

Tourist profile trend (2017)

SWITZERLAND

How many are they and how much do they spend?



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR)	237,642	258,328	270,032	292,442	331,169
Tourist arrivals (> 16 years old)	202,357	217,679	230,503	256,194	289,835
Average daily expenditure (€)	168.86	169.99	176.60	176.54	179.50
. in their place of residence	125.39	123.04	130.84	130.39	130.28
. in the Canary Islands	43.47	46.95	45.76	46.15	49.22
Average length of stay	8.72	9.08	9.55	9.47	9.40
Turnover per tourist (€)	1,383	1,434	1,520	1,512	1,513
Total turnover (€m)	329	371	410	442	501
Tourist arrivals: year on year change	--	8.7%	4.5%	8.3%	13.2%
Turnover: year on year change	--	12.7%	10.7%	7.8%	13.3%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	14.3%	17.2%	14.9%	16.9%	18.0%
- Additional accommodation expenses	9.3%	8.4%	7.7%	8.8%	8.9%
Transport:					
- Public transport	16.0%	15.3%	17.4%	13.5%	16.9%
- Taxi	19.3%	21.0%	20.3%	17.2%	19.2%
- Car rental	23.6%	24.1%	26.3%	22.6%	25.2%
Food and drink:					
- Food purchases at supermarkets	51.2%	53.1%	53.2%	49.8%	51.3%
- Restaurants	56.7%	60.3%	53.3%	56.4%	58.7%
Souvenirs:					
	62.0%	60.1%	57.3%	56.1%	55.1%
Leisure:					
- Organized excursions	21.1%	21.8%	21.1%	18.4%	18.9%
- Leisure, amusement	9.7%	9.2%	10.7%	7.4%	9.1%
- Trip to other islands	2.4%	3.1%	2.4%	1.6%	1.8%
- Sporting activities	11.2%	11.5%	10.3%	10.9%	10.4%
- Cultural activities	4.9%	5.2%	4.9%	5.3%	4.3%
- Discos and disco-pubs	7.1%	4.7%	7.2%	6.4%	5.8%
Others:					
- Wellness	8.4%	10.9%	10.2%	8.9%	6.8%
- Medical expenses	3.9%	4.4%	3.1%	4.1%	4.4%
- Other expenses	12.1%	10.4%	9.8%	10.0%	8.9%

2017



+13%
TOURISTS
331,169



+0.1%
TRAVEL EXPENSES
€1,513



+13%
TURNOVER
€501 MILL

What do they book at their place of residence?



	2013	2014	2015	2016	2017
Flight only	6.9%	9.5%	8.4%	7.6%	9.2%
Flight and accommodation (room only)	15.5%	19.2%	16.4%	17.3%	20.0%
Flight and accommodation (B&B)	13.3%	15.6%	14.7%	17.3%	17.1%
Flight and accommodation (half board)	38.5%	32.4%	28.9%	28.9%	30.1%
Flight and accommodation (full board)	3.8%	4.2%	3.7%	4.8%	4.8%
Flight and accommodation (all inclusive)	22.0%	19.1%	27.8%	24.1%	18.7%
<u>% Tourists using low-cost airlines</u>	28.5%	25.7%	35.0%	39.8%	42.0%
<u>Other expenses in their place of residence:</u>					
- Car rental	15.6%	15.0%	18.1%	18.5%	18.2%
- Sporting activities	6.8%	8.5%	9.9%	8.2%	10.4%
- Excursions	7.6%	8.2%	8.9%	9.1%	9.4%
- Trip to other islands	1.1%	1.6%	2.2%	2.8%	2.1%

How do they book?



	2013	2014	2015	2016	2017
Accommodation booking					
Tour Operator	40.7%	35.8%	41.2%	38.5%	35.1%
- Tour Operator's website	66.9%	70.2%	78.6%	81.1%	74.6%
Accommodation	11.9%	14.2%	14.6%	16.0%	15.2%
- Accommodation's website	85.7%	90.5%	85.4%	87.0%	90.5%
Travel agency (High street)	25.1%	25.4%	16.6%	19.4%	18.0%
Online Travel Agency (OTA)	18.8%	19.1%	22.4%	21.8%	26.8%
No need to book accommodation	3.4%	5.5%	5.1%	4.2%	4.8%
Flight booking					
Tour Operator	42.1%	36.4%	42.5%	38.9%	34.5%
- Tour Operator's website	67.1%	69.8%	75.2%	76.9%	68.4%
Airline	16.0%	21.5%	22.5%	24.5%	28.0%
- Airline's website	94.4%	98.2%	95.7%	96.5%	98.3%
Travel agency (High street)	23.2%	24.9%	16.3%	19.2%	15.9%
Online Travel Agency (OTA)	18.6%	17.2%	18.7%	17.5%	21.6%

How far in advance do they book their trip?



	2013	2014	2015	2016	2017
The same day they leave	0.3%	0.2%	0.5%	0.3%	0.3%
Between 2 and 7 days	8.4%	8.7%	6.9%	5.5%	6.5%
Between 8 and 15 days	12.7%	9.3%	8.5%	7.4%	10.2%
Between 16 and 30 days	16.7%	15.3%	15.3%	14.1%	17.7%
Between 31 and 90 days	34.3%	31.5%	34.1%	37.8%	31.8%
More than 90 days	27.6%	35.0%	34.7%	34.9%	33.6%

Who are they?



	2013	2014	2015	2016	2017
Gender					
Men	49.8%	49.9%	53.2%	53.2%	56.0%
Women	50.2%	50.1%	46.8%	46.8%	44.0%
Age					
Average age (tourists > 16 years old)	41.8	41.9	43.2	44.7	44.8
Standard deviation	14.4	14.2	15.5	15.6	16.3
Age range (> 16 years old)					
16-24 years old	14.0%	12.8%	14.2%	11.4%	13.7%
25-30 years old	12.5%	14.8%	12.6%	12.5%	12.6%
31-45 years old	33.1%	31.1%	28.2%	28.9%	24.2%
46-60 years old	29.1%	30.3%	29.2%	31.3%	30.9%
Over 60 years old	11.3%	11.0%	15.8%	16.0%	18.6%
Occupation					
Business owner or self-employed	15.6%	18.6%	16.0%	17.2%	18.1%
Upper/Middle management employee	52.9%	51.5%	50.8%	50.9%	45.7%
Auxiliary level employee	10.6%	14.3%	11.0%	10.4%	12.1%
Students	8.4%	6.1%	8.1%	7.3%	6.0%
Retired	8.7%	6.9%	11.3%	12.3%	15.5%
Unemployed / unpaid dom. work	3.8%	2.6%	2.7%	1.9%	2.5%
Annual household income level					
€12,000 - €24,000	7.9%	5.3%	6.5%	7.0%	7.0%
€24,001 - €36,000	5.4%	4.9%	3.5%	3.5%	4.4%
€36,001 - €48,000	8.4%	10.5%	6.5%	7.0%	8.0%
€48,001 - €60,000	16.5%	16.6%	14.3%	13.2%	13.2%
€60,001 - €72,000	12.6%	11.9%	12.4%	16.4%	15.8%
€72,001 - €84,000	11.8%	11.6%	11.3%	9.8%	13.1%
More than €84,000	37.4%	39.3%	45.5%	43.1%	38.5%

Tourist profile trend (2017)

SWITZERLAND

Which island do they choose?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	20,843	23,972	28,840	30,955	39,425
- Fuerteventura	43,116	32,213	34,325	42,060	48,868
- Gran Canaria	70,885	75,248	82,807	97,243	107,885
- Tenerife	63,100	80,825	79,718	80,202	85,325
- La Palma	905	1,752	1,734	1,528	5,405

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	10.5%	11.2%	12.7%	12.3%	13.7%
- Fuerteventura	21.7%	15.1%	15.1%	16.7%	17.0%
- Gran Canaria	35.6%	35.2%	36.4%	38.6%	37.6%
- Tenerife	31.7%	37.8%	35.1%	31.8%	29.7%
- La Palma	0.5%	0.8%	0.8%	0.6%	1.9%

Where do they stay?

	2013	2014	2015	2016	2017
5* Hotel	15.5%	17.0%	14.7%	15.3%	18.1%
4* Hotel	40.2%	41.3%	41.2%	45.0%	40.1%
1-2-3* Hotel	17.6%	12.2%	14.0%	12.9%	12.1%
Apartment	22.8%	23.5%	22.2%	20.4%	23.8%
Property (privately-owned, friends, family)	3.1%	4.0%	5.4%	3.5%	3.8%
Others	0.9%	2.0%	2.5%	2.9%	2.0%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	92.9%	92.8%	88.2%	92.1%	89.8%
Beaches	46.5%	37.7%	38.8%	41.9%	39.4%
Tranquillity/rest/relaxation	40.3%	35.8%	35.8%	36.0%	35.1%
Scenery	23.4%	28.6%	27.2%	22.6%	28.4%
Visiting new places	14.7%	18.0%	16.4%	17.5%	19.7%
Security	4.7%	6.1%	10.1%	14.4%	13.2%
Price	11.2%	12.3%	11.8%	8.2%	8.1%
Active tourism	6.0%	7.3%	5.0%	7.6%	7.9%
Ease of travel	9.1%	9.8%	8.9%	10.2%	7.8%
Nautical activities	4.8%	5.3%	5.6%	4.4%	7.2%
Quality of the environment	3.1%	3.1%	4.3%	3.6%	5.1%
Suitable destination for children	4.1%	5.6%	5.4%	4.2%	4.1%
Rural tourism	0.9%	1.3%	1.8%	0.9%	2.7%
Shopping	2.1%	1.1%	1.6%	2.4%	1.9%
Nightlife/fun	4.3%	3.9%	4.4%	3.6%	1.8%
Golf	2.0%	3.2%	2.8%	1.4%	1.1%

* Multi-choice question

Who do they come with?

	2013	2014	2015	2016	2017
Unaccompanied	11.2%	12.4%	12.8%	12.5%	12.8%
Only with partner	49.0%	47.7%	48.1%	46.5%	47.6%
Only with children (under the age of 13)	1.0%	1.2%	0.7%	1.8%	1.6%
Partner + children (under the age of 13)	11.3%	10.5%	10.8%	9.4%	6.8%
Other relatives	5.7%	4.6%	5.4%	5.8%	5.6%
Friends	9.6%	9.5%	7.9%	9.5%	12.1%
Work colleagues	0.1%	0.2%	1.1%	0.5%	0.2%
Other combinations ⁽¹⁾	12.1%	13.8%	13.2%	14.0%	13.4%

* Multi-choice question (different situations have been isolated)

How do they rate the Canary Islands?

Impression of their stay	2013	2014	2015	2016	2017
Good or very good (% tourists)	92.4%	91.9%	92.7%	93.9%	92.2%
Average rating (scale 1-10)	8.64	8.65	8.75	8.79	8.73

How many are loyal to the Canary Islands?

Repeat tourists	2013	2014	2015	2016	2017
At least 1 previous visit	64.8%	67.1%	70.6%	72.4%	69.6%
At least 10 previous visits	11.1%	10.2%	9.7%	13.6%	13.0%

Where does the flight come from?

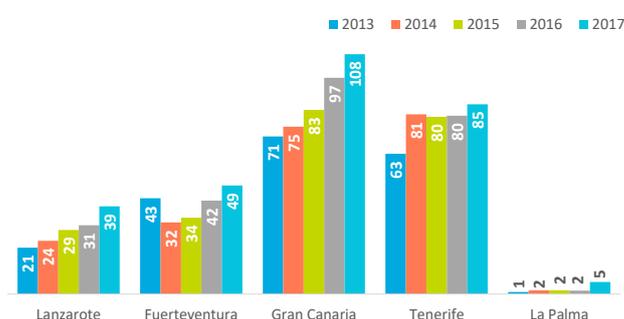
Tourists (> 16 years old)	2013	2014	2015	2016	2017
Switzerland	77.4%	78.4%	76.5%	75.4%	76.9%
Spanish Mainland	15.5%	15.1%	14.8%	18.1%	15.9%
Germany	5.2%	2.3%	4.7%	2.6%	3.1%
Italy	1.3%	2.9%	2.2%	3.1%	2.2%
France	0.0%	0.3%	0.6%	0.3%	0.9%
Austria	0.2%	0.0%	0.0%	0.0%	0.3%
Poland	0.0%	0.0%	0.0%	0.0%	0.1%
United Kingdom	0.4%	0.2%	0.4%	0.2%	0.1%
Belgium	0.0%	0.0%	0.6%	0.1%	0.1%
Others	0.0%	0.9%	0.2%	0.1%	0.5%

What did motivate them to come?

Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	52.3%	54.3%	57.0%	57.8%	58.6%
Recommendation by friends/relatives	32.7%	32.0%	33.9%	35.5%	30.1%
The Canary Islands television channel	0.4%	0.5%	0.7%	0.4%	0.2%
Other television or radio channels	0.6%	0.7%	0.2%	0.5%	1.2%
Information in press/magazines/books	4.2%	4.3%	3.6%	5.3%	5.4%
Attendance at a tourism fair	1.1%	1.2%	0.3%	0.8%	0.9%
Tour Operator's brochure or catalogue	12.8%	11.3%	9.9%	10.4%	7.3%
Recommendation by Travel Agency	15.7%	16.6%	12.2%	12.0%	12.6%
Information obtained via the Internet	30.9%	28.7%	33.7%	30.1%	34.8%
Senior Tourism programme	0.1%	0.0%	0.4%	0.1%	0.0%
Others	7.5%	8.0%	7.8%	5.9%	5.6%

* Multi-choice question

Tourist arrivals by islands (thousands)



Tourists over 16 years old.

Source: Encuesta sobre el Gasto Turístico (ISTAC). (1) Combination of some groups previously analyzed.

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.