

Tourist profile trend (2017)

NORWAY: Fourth Quarter



How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	--	181,660	171,761	171,137	174,211
Tourist arrivals (> 16 years old)	--	151,943	148,990	150,047	153,448
Average daily expenditure (€)	--	128.45	144.80	151.83	150.41
. in their place of residence	--	82.00	96.66	100.13	101.28
. in the Canary Islands	--	46.45	48.14	51.70	49.13
Average lenght of stay	--	10.65	9.94	10.15	11.38
Turnover per tourist (€)	--	1,247	1,300	1,345	1,509
Total turnover (€m)	--	226	223	230	263
Share of annual tourist	--	35.2%	38.6%	39.4%	37.3%
Share of annual turnover	--	35.8%	37.2%	39.3%	37.6%

% tourists who pay in the Canary Islands:

Accommodation:

- Accommodation	--	8.8%	8.5%	13.0%	11.8%
- Additional accommodation expenses	--	4.1%	4.0%	1.4%	2.7%

Transport:

- Public transport	--	15.2%	15.0%	20.3%	14.9%
- Taxi	--	27.2%	31.0%	32.5%	32.1%
- Car rental	--	9.0%	10.5%	13.3%	13.8%

Food and drink:

- Food purchases at supermarkets	--	62.0%	67.7%	69.4%	63.3%
- Restaurants	--	65.9%	65.7%	65.3%	77.6%

Souvenirs:	--	45.7%	39.3%	41.5%	34.4%
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Leisure:

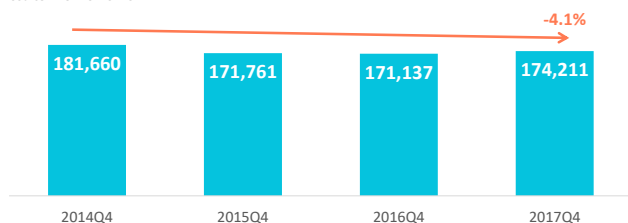
- Organized excursions	--	11.0%	5.2%	7.6%	8.3%
- Leisure, amusement	--	5.4%	5.3%	4.8%	4.8%
- Trip to other islands	--	0.5%	1.4%	2.4%	1.0%
- Sporting activities	--	4.4%	3.3%	4.7%	4.8%
- Cultural activities	--	1.0%	2.7%	3.4%	3.9%
- Discos and disco-pubs	--	5.4%	5.1%	9.9%	2.7%

Others:

- Wellness	--	5.5%	4.1%	4.9%	3.3%
- Medical expenses	--	1.5%	2.3%	3.3%	1.8%
- Other expenses	--	9.0%	10.3%	8.9%	7.7%

TOURIST ARRIVALS

Source: FRONTUR ISTAT



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	--	10.8%	11.4%	7.0%	10.5%
Flight and accommodation (room only)	--	42.1%	46.3%	56.2%	54.5%
Flight and accommodation (B&B)	--	18.3%	13.0%	14.5%	17.0%
Flight and accommodation (half board)	--	7.6%	9.9%	6.0%	7.2%
Flight and accommodation (full board)	--	2.5%	2.0%	2.3%	1.6%
Flight and accommodation (all inclusive)	--	18.6%	17.4%	14.1%	9.3%
% Tourists using low-cost airlines	--	30.1%	35.1%	33.1%	36.3%
Other expenses in their place of residence:					
- Car rental	--	3.4%	2.6%	4.7%	2.5%
- Sporting activities	--	1.4%	1.5%	1.9%	3.1%
- Excursions	--	1.5%	1.7%	2.3%	0.7%
- Trip to other islands	--	0.9%	0.7%	0.0%	0.5%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	--	67.6%	61.5%	59.3%	61.7%
- Tour Operator's website	--	95.3%	95.3%	92.1%	98.9%
Accommodation	--	8.8%	12.1%	15.2%	13.3%
- Accommodation's website	--	60.7%	66.6%	68.6%	66.5%
Travel agency (High street)	--	10.5%	7.6%	7.0%	5.6%
Online Travel Agency (OTA)	--	6.2%	9.9%	11.2%	11.1%
No need to book accommodation	--	6.9%	8.9%	7.4%	8.4%

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight booking					
Tour Operator	--	67.8%	63.3%	61.5%	61.7%
- Tour Operator's website	--	93.3%	95.5%	91.4%	94.8%
Airline	--	14.9%	23.3%	25.6%	22.8%
- Airline's website	--	95.6%	97.8%	94.8%	100.0%
Travel agency (High street)	--	10.0%	7.8%	5.4%	6.9%
Online Travel Agency (OTA)	--	7.3%	5.7%	7.5%	8.6%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	--	0.2%	0.4%	0.3%	0.2%
Between 2 and 7 days	--	12.0%	5.7%	11.6%	3.8%
Between 8 and 15 days	--	9.5%	9.5%	5.3%	7.9%
Between 16 and 30 days	--	13.1%	13.6%	14.4%	15.2%
Between 31 and 90 days	--	33.9%	40.9%	35.9%	39.7%
More than 90 days	--	31.3%	29.8%	32.4%	33.2%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	--	50.1%	55.1%	54.5%	51.6%
Women	--	49.9%	44.9%	45.5%	48.4%

Age

Average age (tourists > 16 years old)	--	50.7	51.5	50.9	55.1
Standard deviation	--	14.8	15.3	16.5	14.9

Age range (> 16 years old)

16-24 years old	--	6.3%	7.3%	7.1%	4.9%
25-30 years old	--	6.8%	5.1%	8.3%	5.3%
31-45 years old	--	19.2%	20.3%	21.5%	14.0%
46-60 years old	--	38.5%	34.5%	27.3%	29.3%
Over 60 years old	--	29.2%	32.8%	35.8%	46.6%

Occupation

Business owner or self-employed	--	11.2%	15.0%	15.9%	13.4%
Upper/Middle management employee	--	42.5%	38.1%	32.9%	27.4%
Auxiliary level employee	--	20.1%	21.0%	22.7%	18.8%
Students	--	4.3%	3.5%	4.8%	3.6%
Retired	--	20.6%	20.3%	21.8%	36.6%
Unemployed / unpaid dom. work	--	1.3%	2.0%	1.8%	0.2%

Annual household income level

€12,000 - €24,000	--	4.3%	4.4%	9.2%	3.3%
€24,001 - €36,000	--	9.3%	7.6%	10.1%	10.2%
€36,001 - €48,000	--	17.4%	13.3%	15.7%	14.6%
€48,001 - €60,000	--	16.2%	19.9%	15.8%	19.8%
€60,001 - €72,000	--	12.6%	14.3%	16.4%	15.3%
€72,001 - €84,000	--	9.5%	10.5%	8.7%	10.3%
More than €84,000	--	30.8%	30.0%	24.1%	26.6%

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Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	--	12,589	11,443	10,944	9,117
- Fuerteventura	--	2,406	2,129	5,948	2,115
- Gran Canaria	--	96,056	102,622	110,411	109,973
- Tenerife	--	40,748	31,861	22,743	30,142
- La Palma	--	0	348	0	1,602

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	--	4.8%	7.1%	6.4%	4.2%
4* Hotel	--	27.0%	28.1%	22.6%	18.5%
1-2-3* Hotel	--	17.5%	14.6%	12.7%	17.4%
Apartment	--	43.8%	41.4%	52.0%	54.2%
Property (privately-owned, friends, family)	--	4.6%	5.4%	2.7%	3.6%
Others	--	2.4%	3.3%	3.6%	2.1%

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	--	9.4%	9.8%	12.2%	9.3%
Only with partner	--	53.0%	51.8%	44.5%	53.8%
Only with children (under the age of 13)	--	0.9%	1.4%	2.8%	0.4%
Partner + children (under the age of 13)	--	7.1%	7.1%	4.0%	3.9%
Other relatives	--	6.9%	7.4%	12.2%	5.0%
Friends	--	7.2%	6.6%	6.2%	8.4%
Work colleagues	--	0.2%	0.2%	0.4%	0.9%
Other combinations ⁽¹⁾	--	15.2%	15.7%	17.7%	18.2%

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

How do they rate the Canary Islands?

Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	--	92.4%	90.1%	85.9%	92.3%
Average rating (scale 1-10)	--	8.76	8.65	8.38	8.84

How many are loyal to the Canary Islands?

Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	--	86.5%	90.8%	89.6%	92.5%
At least 10 previous visits	--	25.1%	29.7%	24.5%	35.4%

Where does the flight come from?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Norway	--	99.2%	97.3%	93.3%	98.1%
Spanish Mainland	--	0.0%	1.1%	0.3%	1.0%
Sweden	--	0.0%	0.1%	2.1%	0.5%
Finland	--	0.0%	0.0%	0.0%	0.2%
United Kingdom	--	0.4%	0.3%	2.2%	0.2%
Germany	--	0.0%	0.5%	0.7%	0.0%
Austria	--	0.0%	0.0%	0.2%	0.0%
Denmark	--	0.2%	0.4%	0.6%	0.0%
Ireland	--	0.2%	0.0%	0.0%	0.0%
Others	--	0.0%	0.2%	0.7%	0.0%

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	--	8.3%	7.7%	7.3%	6.0%
- Fuerteventura	--	1.6%	1.4%	4.0%	1.4%
- Gran Canaria	--	63.3%	69.2%	73.6%	71.9%
- Tenerife	--	26.8%	21.5%	15.2%	19.7%
- La Palma	--	0.0%	0.2%	0.0%	1.0%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	--	95.8%	94.5%	92.8%	96.6%
Tranquillity/rest/relaxation	--	54.8%	52.7%	57.5%	55.2%
Beaches	--	43.1%	39.4%	43.3%	43.3%
Security	--	7.5%	9.7%	9.3%	14.3%
Visiting new places	--	11.2%	9.8%	10.2%	9.3%
Active tourism	--	4.9%	7.3%	6.8%	8.9%
Price	--	15.4%	9.7%	9.8%	8.6%
Scenery	--	10.0%	7.8%	3.4%	7.4%
Suitable destination for children	--	3.2%	5.4%	5.0%	3.7%
Ease of travel	--	3.3%	5.2%	1.7%	3.2%
Nightlife/fun	--	3.2%	2.2%	3.2%	2.6%
Shopping	--	4.1%	2.6%	1.6%	2.0%
Culture	--	1.6%	1.9%	2.2%	1.5%
Golf	--	1.1%	1.3%	0.4%	1.3%
Security against natural catastrophes	--	1.0%	1.3%	2.7%	1.2%
Quality of the environment	--	1.6%	1.8%	1.1%	0.9%

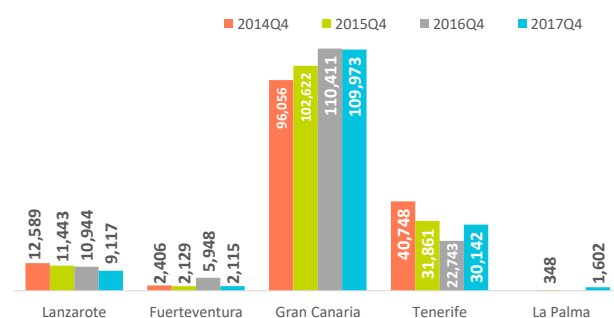
* Multi-choice question

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	--	75.8%	81.6%	77.5%	85.6%
Recommendation by friends/relatives	--	27.3%	22.1%	27.3%	21.5%
The Canary Islands television channel	--	0.6%	0.0%	0.0%	0.0%
Other television or radio channels	--	0.5%	0.4%	0.7%	0.5%
Information in press/magazines/books	--	1.9%	1.3%	2.8%	3.1%
Attendance at a tourism fair	--	0.2%	0.0%	0.5%	0.0%
Tour Operator's brochure or catalogue	--	6.7%	5.3%	6.7%	4.0%
Recommendation by Travel Agency	--	5.7%	3.1%	4.4%	1.0%
Information obtained via the Internet	--	27.2%	28.1%	25.7%	32.2%
Senior Tourism programme	--	0.2%	0.2%	0.0%	0.0%
Others	--	6.5%	6.6%	5.1%	4.8%

* Multi-choice question

Tourist arrivals by islands



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.