

## Tourist profile trend (2017)

### Norway: First Quarter

#### How many are they and how much do they spend?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	--	197,583	166,737	165,346	170,603
Average daily expenditure (€)	--	122.90	127.58	131.18	153.56
. in their place of residence	--	77.73	84.48	88.69	102.09
. in the Canary Islands	--	45.17	43.10	42.48	51.47
Average length of stay	--	11.55	13.30	12.77	12.50
Turnover per tourist (€)	--	1,244	1,353	1,377	1,580
Total turnover (> 16 years old) (€m)	--	246	226	228	269
Share of total turnover	--	45.6%	43.5%	44.8%	--
Share of total tourist	--	45.0%	43.4%	43.9%	--

#### Expenditure in the Canary Islands per tourist and trip (€) (\*)

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Accommodation (**):</b>	--	38.84	63.55	41.62	63.04
- Accommodation	--	35.35	60.16	37.76	46.29
- Additional accommodation expenses	--	3.49	3.39	3.85	16.75
<b>Transport:</b>	--	30.40	30.00	29.07	31.72
- Public transport	--	5.44	7.04	6.11	6.92
- Taxi	--	15.55	14.15	15.49	14.48
- Car rental	--	9.41	8.81	7.46	10.33
<b>Food and drink:</b>	--	291.64	309.83	321.62	354.85
- Food purchases at supermarkets	--	151.67	155.64	165.00	161.02
- Restaurants	--	139.98	154.19	156.62	193.84
<b>Souvenirs:</b>	--	61.23	51.53	44.53	76.05
<b>Leisure:</b>	--	24.33	22.40	18.53	24.28
- Organized excursions	--	9.20	7.98	6.18	6.57
- Leisure, amusement	--	3.10	2.48	0.71	3.45
- Trip to other islands	--	0.63	1.83	3.06	0.98
- Sporting activities	--	3.93	3.39	4.22	5.89
- Cultural activities	--	1.80	1.95	1.64	1.51
- Discos and disco-pubs	--	5.67	4.79	2.73	5.88
<b>Others:</b>	--	30.63	19.98	22.55	17.14
- Wellness	--	1.73	5.09	1.76	4.55
- Medical expenses	--	1.20	2.55	1.30	0.98
- Other expenses	--	27.70	12.34	19.49	11.60

#### How far in advance do they book their trip?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	--	0.3%	0.1%	0.6%	0.2%
Between 2 and 7 days	--	10.4%	8.6%	9.3%	8.2%
Between 8 and 15 days	--	9.9%	8.1%	5.8%	7.7%
Between 16 and 30 days	--	17.6%	17.0%	17.4%	11.8%
Between 31 and 90 days	--	29.6%	32.7%	31.4%	34.5%
More than 90 days	--	32.2%	33.4%	35.6%	37.6%

#### What do they book at their place of residence?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	--	13.8%	14.0%	9.3%	13.4%
Flight and accommodation (room only)	--	47.7%	46.6%	47.7%	48.8%
Flight and accommodation (B&B)	--	13.3%	14.8%	14.5%	16.8%
Flight and accommodation (half board)	--	6.9%	4.9%	10.7%	7.1%
Flight and accommodation (full board)	--	2.3%	3.6%	2.1%	1.7%
Flight and accommodation (all inclusive)	--	16.0%	16.1%	15.6%	12.3%
<b>% Tourists using low-cost airlines</b>	--	37.6%	37.4%	35.6%	42.3%
<b>Other expenses in their place of residence:</b>					
- Car rental	--	3.7%	2.3%	2.0%	4.2%
- Sporting activities	--	2.9%	1.6%	4.6%	4.2%
- Excursions	--	1.6%	1.9%	4.2%	2.0%
- Trip to other islands	--	0.5%	1.4%	1.1%	0.5%

#### How do they book?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Accommodation booking</b>					
<b>Tour Operator</b>	--	62.3%	60.8%	63.0%	52.6%
- Tour Operator's website	--	90.1%	92.6%	92.4%	88.2%
<b>Accommodation</b>	--	13.9%	16.5%	13.4%	19.2%
- Accommodation's website	--	77.8%	60.0%	72.9%	77.6%
<b>Travel agency (High street)</b>	--	5.4%	6.2%	7.2%	4.4%
<b>Online Travel Agency (OTA)</b>	--	9.1%	8.1%	9.8%	12.2%
<b>No need to book accommodation</b>	--	9.2%	8.4%	6.6%	11.5%

#### Flight booking

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Tour Operator</b>	--	64.1%	62.5%	61.5%	55.1%
- Tour Operator's website	--	89.1%	91.0%	91.1%	91.9%
<b>Airline</b>	--	22.8%	23.4%	20.9%	32.4%
- Airline's website	--	97.1%	96.5%	96.3%	97.7%
<b>Travel agency (High street)</b>	--	5.7%	7.5%	6.6%	4.2%
<b>Online Travel Agency (OTA)</b>	--	7.3%	6.6%	11.0%	8.3%

#### Where do they stay?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	--	3.8%	4.5%	6.8%	3.4%
4* Hotel	--	21.5%	24.0%	25.3%	21.7%
1-2-3* Hotel	--	16.0%	16.8%	16.6%	11.2%
Apartment	--	49.2%	47.7%	46.6%	52.2%
Property (privately-owned, friends, family)	--	5.4%	5.4%	3.5%	6.8%
Others	--	4.2%	1.6%	1.1%	4.7%

#### Who are they?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Gender</b>					
Percentage of men	--	53.2%	51.3%	54.5%	51.3%
Percentage of women	--	46.8%	48.7%	45.5%	48.7%
<b>Age</b>					
Average age (tourists > 16 years old)	--	49.0	52.4	52.2	50.2
Standard deviation	--	16.2	16.5	16.1	16.1
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	--	9.2%	8.4%	4.7%	6.8%
25-30 years old	--	9.2%	5.8%	7.1%	6.7%
31-45 years old	--	21.5%	18.7%	21.9%	27.0%
46-60 years old	--	31.1%	30.1%	27.9%	29.6%
Over 60 years old	--	29.0%	36.9%	38.5%	29.9%
<b>Occupation</b>					
Business owner or self-employed	--	12.9%	14.2%	11.5%	19.6%
Upper/Middle management employee	--	37.2%	30.9%	37.4%	34.9%
Auxiliary level employee	--	18.8%	18.0%	17.4%	17.2%
Students	--	7.2%	7.2%	8.4%	4.7%
Retired	--	23.5%	27.3%	24.4%	22.0%
Unemployed / unpaid dom. work	--	0.4%	2.6%	0.8%	1.6%
<b>Annual household income level</b>					
€12,000 - €24,000	--	7.7%	4.9%	6.1%	3.7%
€24,001 - €36,000	--	6.4%	8.0%	6.5%	9.3%
€36,001 - €48,000	--	14.9%	15.8%	22.1%	11.0%
€48,001 - €60,000	--	21.5%	22.0%	17.5%	19.7%
€60,001 - €72,000	--	11.9%	12.3%	11.5%	13.4%
€72,001 - €84,000	--	8.8%	10.6%	10.5%	12.6%
More than €84,000	--	28.7%	26.3%	25.9%	30.3%

(\*) Expense is prorated among all the tourists (even those who have not spent in destination).

(\*\*) Accommodation expenses may seem low because most tourists pay the accommodation before traveling.

## Tourist profile trend (2017)

### Norway: First Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	--	17,462	11,760	4,619	10,856
- Fuerteventura	--	3,205	3,126	20,933	4,037
- Gran Canaria	--	124,728	100,083	114,897	118,602
- Tenerife	--	51,768	50,807	24,897	36,315
- La Palma	--	0	255	0	159

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	--	8.9%	7.1%	2.8%	6.4%
- Fuerteventura	--	1.6%	1.9%	12.7%	2.4%
- Gran Canaria	--	63.3%	60.3%	69.5%	69.8%
- Tenerife	--	26.3%	30.6%	15.1%	21.4%
- La Palma	--	0.0%	0.2%	0.0%	0.1%

#### Who do they come with?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	--	9.4%	9.5%	11.2%	10.5%
Only with partner	--	46.6%	53.1%	56.1%	41.8%
Only with children (under the age of 13)	--	2.4%	1.0%	1.7%	2.5%
Partner + children (under the age of 13)	--	7.1%	8.9%	7.2%	10.8%
Other relatives	--	5.8%	5.2%	3.5%	6.9%
Friends	--	7.6%	7.5%	7.4%	6.6%
Work colleagues	--	0.6%	0.2%	0.0%	0.0%
Other combinations <sup>(1)</sup>	--	20.5%	14.6%	12.9%	21.0%

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

#### How do they rate the destination?



Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	--	91.3%	87.5%	86.9%	93.9%
Average rating (scale 1-10)	--	8.77	8.54	8.63	8.79

#### How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	--	88.4%	92.3%	92.2%	90.0%
In love (at least 10 previous visits)	--	24.9%	29.0%	28.2%	32.8%

#### Where does the flight come from?



Ten main origin markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Norway	--	98.7%	96.6%	98.3%	94.6%
Spanish Mainland	--	0.2%	0.7%	0.9%	2.2%
Sweden	--	0.1%	1.0%	0.4%	1.7%
United Kingdom	--	0.1%	0.3%	0.4%	0.6%
Denmark	--	0.8%	0.7%	0.0%	0.5%
Germany	--	0.0%	0.0%	0.0%	0.3%
Netherlands	--	0.0%	0.2%	0.0%	0.1%
Finland	--	0.0%	0.2%	0.0%	0.0%
Austria	--	0.0%	0.0%	0.0%	0.0%
Ireland	--	0.0%	0.0%	0.0%	0.0%

#### Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	--	95.5%	94.3%	96.3%	97.2%
Tranquillity/rest/relaxation	--	50.5%	55.5%	51.0%	51.1%
Beaches	--	34.1%	32.2%	35.7%	34.4%
Suitable destination for children	--	8.4%	8.0%	7.6%	12.5%
Security	--	8.6%	8.6%	14.0%	12.4%
Scenery	--	11.5%	12.0%	9.9%	11.3%
Active tourism	--	9.3%	10.3%	11.1%	10.5%
Price	--	16.3%	11.8%	11.7%	8.8%
Visiting new places	--	10.1%	9.6%	7.4%	6.0%
Ease of travel	--	3.1%	3.9%	3.7%	4.8%
Shopping	--	3.4%	3.4%	1.8%	3.0%
Nightlife/fun	--	2.4%	2.0%	7.2%	2.7%
Quality of the environment	--	1.9%	1.5%	0.7%	2.2%
Golf	--	1.7%	0.8%	0.2%	1.6%
Culture	--	1.3%	2.0%	2.5%	1.5%
Theme parks	--	0.3%	0.7%	2.5%	1.3%

\* Multi-choice question

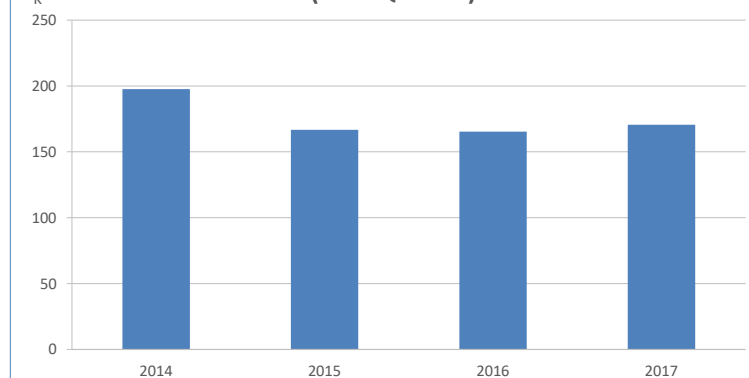
#### What did motivate them to come?



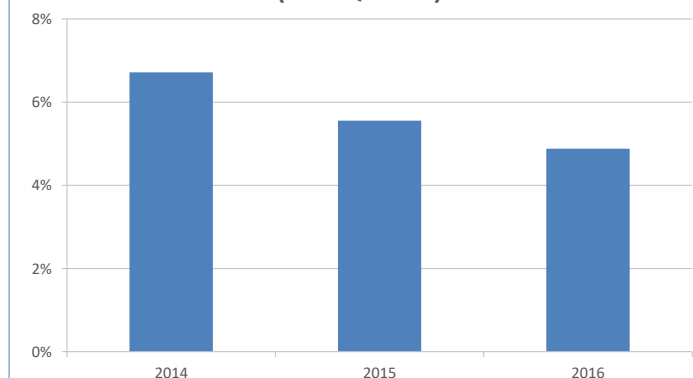
Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	--	79.1%	83.6%	80.3%	80.8%
Recommendation by friends or relatives	--	28.0%	27.3%	27.5%	29.9%
The Canary Islands television channel	--	0.3%	0.0%	0.0%	0.0%
Other television or radio channels	--	0.2%	0.4%	0.2%	0.0%
Information in the press/magazines/books	--	4.0%	4.3%	2.7%	3.8%
Attendance at a tourism fair	--	0.2%	0.0%	0.3%	0.0%
Tour Operator's brochure or catalogue	--	4.8%	5.2%	5.9%	2.7%
Recommendation by Travel Agency	--	3.1%	3.1%	3.4%	2.2%
Information obtained via the Internet	--	32.9%	26.6%	30.9%	24.9%
Senior Tourism programme	--	0.3%	0.3%	0.0%	0.0%
Others	--	6.5%	4.7%	5.3%	7.2%

\* Multi-choice question

Tourist arrivals trend (> 16 years old)  
(First Quarter)



Share of tourists (> 16 years old)  
(First Quarter)



Source: Encuesta sobre el Gasto Turístico (ISTAC). The information of 2013 is not shown due to sample failure. (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.