

Tourist profile trend (2016)

Canary Islands: Dutch market



How many are they and how much do they spend?



How do they book?



| | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---------|---------|---------|---------|---------|
| Tourist arrivals (> 16 years old) | 392,763 | 407,559 | 402,089 | 425,859 | 540,656 |
| Average daily expenditure (€) | 119.57 | 122.15 | 117.92 | 121.50 | 121.05 |
| - in their place of residence | 83.90 | 83.61 | 82.90 | 86.17 | 86.53 |
| - in the Canary Islands | 35.67 | 38.54 | 35.02 | 35.33 | 34.52 |
| Average length of stay | 10.27 | 9.46 | 10.38 | 9.56 | 9.01 |
| Turnover per tourist (€) | 1,124 | 1,065 | 1,075 | 1,074 | 1,032 |
| Total turnover (> 16 years old) (€m) | 442 | 434 | 432 | 458 | 558 |
| Dutch turnover: year on year change | -- | -1.7% | -0.4% | 5.8% | 22.0% |
| Dutch tourist arrivals: year on year change | -- | 3.8% | -1.3% | 5.9% | 27.0% |

| Accommodation booking | 2012 | 2013 | 2014 | 2015 | 2016 |
|--------------------------------------|-------|-------|-------|-------|-------|
| Tour Operator | 58.3% | 46.9% | 55.1% | 53.5% | 42.9% |
| - Tour Operator's website | 80.5% | 81.4% | 84.6% | 86.5% | 77.8% |
| Accommodation | 6.0% | 13.7% | 8.6% | 7.7% | 11.1% |
| - Accommodation's website | 71.4% | 71.5% | 86.5% | 91.5% | 85.5% |
| Travel agency (High street) | 26.9% | 24.2% | 23.3% | 22.1% | 26.1% |
| Online Travel Agency (OTA) | 7.0% | 12.7% | 9.8% | 14.8% | 17.6% |
| No need to book accommodation | 1.8% | 2.5% | 3.2% | 1.9% | 2.3% |

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

| | | | | | |
|-------------------------------------|--------|--------|--------|--------|--------|
| Accommodation (**): | 34.64 | 53.85 | 38.19 | 38.32 | 38.10 |
| - Accommodation | 28.16 | 46.08 | 32.78 | 31.93 | 30.66 |
| - Additional accommodation expenses | 6.47 | 7.77 | 5.41 | 6.38 | 7.44 |
| Transport: | 26.97 | 26.48 | 25.07 | 27.03 | 23.96 |
| - Public transport | 3.82 | 6.32 | 4.19 | 4.26 | 3.55 |
| - Taxi | 7.98 | 4.65 | 6.37 | 6.61 | 6.27 |
| - Car rental | 15.18 | 15.51 | 14.51 | 16.16 | 14.15 |
| Food and drink: | 167.25 | 137.76 | 160.39 | 158.85 | 142.61 |
| - Food purchases at supermarkets | 65.43 | 51.18 | 65.50 | 63.67 | 53.62 |
| - Restaurants | 101.82 | 86.58 | 94.90 | 95.18 | 88.98 |
| Souvenirs: | 49.93 | 83.96 | 54.63 | 46.18 | 46.35 |
| Leisure: | 42.89 | 36.19 | 34.59 | 34.26 | 31.00 |
| - Organized excursions | 19.60 | 19.27 | 16.80 | 17.85 | 15.85 |
| - Leisure, amusement | 4.07 | 3.98 | 4.06 | 4.32 | 3.37 |
| - Trip to other islands | 0.88 | 0.16 | 0.75 | 1.05 | 1.43 |
| - Sporting activities | 4.37 | 5.60 | 4.67 | 4.45 | 4.55 |
| - Cultural activities | 3.31 | 1.63 | 2.94 | 2.58 | 2.82 |
| - Discos and disco-pubs | 10.65 | 5.55 | 5.37 | 4.02 | 2.99 |
| Others: | 23.08 | 14.07 | 12.28 | 10.17 | 14.48 |
| - Wellness | 2.50 | 1.89 | 2.33 | 1.31 | 2.82 |
| - Medical expenses | 2.26 | 2.10 | 1.36 | 1.94 | 0.81 |
| - Other expenses | 18.31 | 10.08 | 8.59 | 6.92 | 10.85 |

| Flight booking | 2012 | 2013 | 2014 | 2015 | 2016 |
|------------------------------------|-------|-------|-------|-------|-------|
| Tour Operator | 63.1% | 50.4% | 55.3% | 54.2% | 45.9% |
| - Tour Operator's website | 75.8% | 75.1% | 80.9% | 82.0% | 72.4% |
| Airline | 10.2% | 20.6% | 16.6% | 14.0% | 18.2% |
| - Airline's website | 95.8% | 98.9% | 94.6% | 97.2% | 97.0% |
| Travel agency (High street) | 22.3% | 21.4% | 20.6% | 19.7% | 21.6% |
| Online Travel Agency (OTA) | 4.4% | 7.6% | 7.5% | 12.1% | 14.3% |

Where do they stay?



| | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|-------|-------|-------|-------|-------|
| 5* Hotel | 5.8% | 8.6% | 4.7% | 4.6% | 6.3% |
| 4* Hotel | 33.4% | 34.6% | 33.6% | 32.6% | 35.8% |
| 1-2-3* Hotel | 18.5% | 17.9% | 17.8% | 20.7% | 16.7% |
| Apartment | 40.2% | 36.9% | 40.3% | 40.1% | 38.8% |
| Property (privately-owned, friends, family) | 1.2% | 1.1% | 2.7% | 1.2% | 1.6% |
| Others | 0.9% | 0.9% | 1.0% | 0.8% | 0.9% |

Who are they?



| Gender | 2012 | 2013 | 2014 | 2015 | 2016 |
|---------------------|-------|-------|-------|-------|-------|
| Percentage of men | 48.0% | 59.0% | 51.1% | 50.7% | 51.5% |
| Percentage of women | 52.0% | 41.0% | 48.9% | 49.3% | 48.5% |

| Age | 2012 | 2013 | 2014 | 2015 | 2016 |
|---------------------------------------|------|------|------|------|------|
| Average age (tourists > 16 years old) | 46.4 | 44.3 | 44.9 | 46.1 | 44.6 |
| Standard deviation | 14.9 | 14.2 | 15.0 | 15.6 | 15.9 |

| Age range (> 16 years old) | 2012 | 2013 | 2014 | 2015 | 2016 |
|----------------------------|-------|-------|-------|-------|-------|
| 16-24 years old | 9.8% | 10.2% | 12.0% | 13.0% | 13.4% |
| 25-30 years old | 10.7% | 9.7% | 11.2% | 8.5% | 11.1% |
| 31-45 years old | 23.1% | 33.8% | 25.7% | 23.4% | 27.8% |
| 46-60 years old | 37.8% | 31.4% | 35.1% | 35.1% | 29.2% |
| Over 60 years old | 18.6% | 15.0% | 16.0% | 20.0% | 18.6% |

| Occupation | 2012 | 2013 | 2014 | 2015 | 2016 |
|----------------------------------|-------|-------|-------|-------|-------|
| Business owner or self-employed | 18.8% | 25.7% | 21.0% | 18.9% | 23.0% |
| Upper/Middle management employee | 47.2% | 39.1% | 49.4% | 46.5% | 41.9% |
| Auxiliary level employee | 9.9% | 12.7% | 8.9% | 10.3% | 8.8% |
| Students | 5.6% | 8.9% | 6.1% | 8.1% | 10.9% |
| Retired | 15.9% | 10.5% | 11.9% | 13.7% | 13.2% |
| Unemployed / unpaid dom. work | 2.5% | 3.1% | 2.7% | 2.6% | 2.2% |

| Annual household income level | 2012 | 2013 | 2014 | 2015 | 2016 |
|-------------------------------|-------|-------|-------|-------|-------|
| €12,000 - €24,000 | 13.0% | 11.7% | 12.6% | 13.6% | 14.4% |
| €24,001 - €36,000 | 21.9% | 17.8% | 19.0% | 19.0% | 17.3% |
| €36,001 - €48,000 | 19.5% | 16.5% | 17.6% | 20.3% | 15.7% |
| €48,001 - €60,000 | 17.5% | 16.9% | 16.5% | 18.9% | 15.1% |
| €60,001 - €72,000 | 8.5% | 9.1% | 10.7% | 8.7% | 12.3% |
| €72,001 - €84,000 | 6.3% | 5.1% | 6.3% | 6.0% | 7.3% |
| More than €84,000 | 13.3% | 23.0% | 17.2% | 13.5% | 17.9% |

How far in advance do they book their trip?



| | 2012 | 2013 | 2014 | 2015 | 2016 |
|-------------------------|-------|-------|-------|-------|-------|
| The same day they leave | 0.5% | 0.9% | 0.7% | 0.4% | 0.6% |
| Between 2 and 7 days | 8.4% | 11.6% | 8.3% | 7.5% | 6.7% |
| Between 8 and 15 days | 17.0% | 13.2% | 15.7% | 16.4% | 9.8% |
| Between 16 and 30 days | 14.8% | 15.3% | 15.3% | 13.8% | 12.5% |
| Between 31 and 90 days | 30.6% | 31.1% | 30.8% | 32.6% | 37.0% |
| More than 90 days | 28.7% | 27.9% | 29.2% | 29.3% | 33.3% |

What do they book at their place of residence?



| | 2012 | 2013 | 2014 | 2015 | 2016 |
|--|-------|-------|-------|-------|-------|
| Flight only | 5.0% | 7.2% | 6.3% | 4.1% | 4.4% |
| Flight and accommodation (room only) | 34.3% | 33.2% | 33.5% | 33.3% | 31.1% |
| Flight and accommodation (B&B) | 8.4% | 9.7% | 10.6% | 10.4% | 10.6% |
| Flight and accommodation (half board) | 22.8% | 21.1% | 18.9% | 19.4% | 20.1% |
| Flight and accommodation (full board) | 1.9% | 2.1% | 2.2% | 2.1% | 2.1% |
| Flight and accommodation (all inclusive) | 27.6% | 26.7% | 28.5% | 30.6% | 31.7% |
| % Tourists using low-cost airlines | 20.5% | 38.0% | 30.5% | 29.1% | 39.8% |
| Other expenses in their place of residence: | | | | | |
| - Car rental | 11.5% | 14.8% | 10.7% | 11.3% | 11.8% |
| - Sporting activities | 3.9% | 4.2% | 3.3% | 3.0% | 3.3% |
| - Excursions | 1.5% | 3.9% | 2.3% | 3.1% | 3.3% |
| - Trip to other islands | 0.5% | 1.6% | 0.3% | 0.9% | 0.8% |

(*) 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.

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Canary Islands: Dutch market

Which island do they choose?

| Tourists (> 16 years old) | 2012 | 2013 | 2014 | 2015 | 2016 |
|---------------------------|---------|---------|---------|---------|---------|
| - Lanzarote | 52,167 | 58,642 | 60,122 | 66,270 | 85,543 |
| - Fuerteventura | 40,198 | 45,996 | 36,203 | 40,614 | 54,698 |
| - Gran Canaria | 163,162 | 163,600 | 158,587 | 170,860 | 209,880 |
| - Tenerife | 121,761 | 125,295 | 133,439 | 131,287 | 167,653 |
| - La Palma | 13,418 | 13,879 | 12,615 | 14,013 | 20,718 |

| Share (%) | 2012 | 2013 | 2014 | 2015 | 2016 |
|-----------------|-------|-------|-------|-------|-------|
| - Lanzarote | 13.4% | 14.4% | 15.0% | 15.7% | 15.9% |
| - Fuerteventura | 10.3% | 11.3% | 9.0% | 9.6% | 10.2% |
| - Gran Canaria | 41.8% | 40.2% | 39.6% | 40.4% | 39.0% |
| - Tenerife | 31.2% | 30.8% | 33.3% | 31.0% | 31.1% |
| - La Palma | 3.4% | 3.4% | 3.1% | 3.3% | 3.8% |

Who do they come with?

| | 2012 | 2013 | 2014 | 2015 | 2016 |
|--|-------|-------|-------|-------|-------|
| Unaccompanied | 5.5% | 10.1% | 8.7% | 5.7% | 6.1% |
| Only with partner | 57.3% | 47.4% | 50.9% | 55.8% | 47.1% |
| Only with children (under the age of 13) | 0.6% | 1.3% | 1.7% | 1.0% | 1.3% |
| Partner + children (under the age of 13) | 9.0% | 11.3% | 11.3% | 10.4% | 14.1% |
| Other relatives | 4.2% | 5.0% | 3.9% | 5.4% | 5.2% |
| Friends | 6.4% | 5.0% | 5.0% | 5.5% | 5.9% |
| Work colleagues | 0.4% | 0.1% | 0.2% | 0.1% | 0.2% |
| Other combinations ⁽¹⁾ | 16.6% | 19.7% | 18.3% | 16.1% | 20.2% |

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

How do they rate the destination?

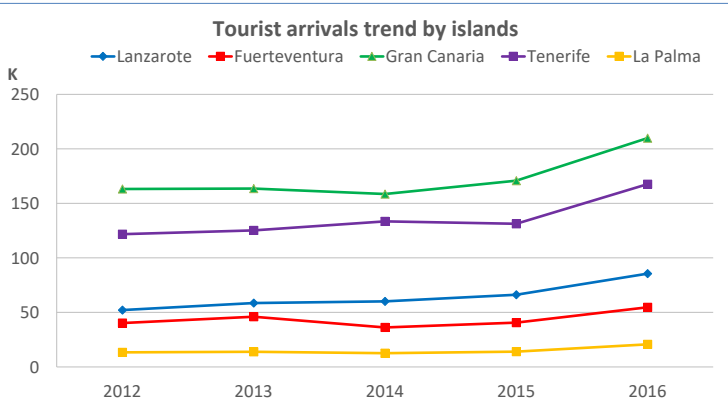
| Impression of their stay | 2012 | 2013 | 2014 | 2015 | 2016 |
|--------------------------------|-------|-------|-------|-------|-------|
| Good or very good (% tourists) | 92.3% | 88.9% | 94.9% | 94.3% | 94.0% |
| Average rating (scale 1-10) | 8.37 | 8.33 | 8.48 | 8.46 | 8.53 |

How many are loyal to the destination?

| Repeat tourists of the Canary Islands | 2012 | 2013 | 2014 | 2015 | 2016 |
|---------------------------------------|-------|-------|-------|-------|-------|
| Repeat tourists | 71.7% | 74.3% | 70.1% | 72.3% | 70.8% |
| In love (at least 10 previous visits) | 13.6% | 15.3% | 15.8% | 12.7% | 12.2% |

Where does the flight come from?

| Ten main origin countries | 2012 | 2013 | 2014 | 2015 | 2016 |
|---------------------------|---------|---------|---------|---------|---------|
| Netherlands | 328,924 | 147,976 | 326,176 | 338,880 | 262,199 |
| Germany | 31,340 | 181,137 | 41,576 | 48,530 | 166,770 |
| Belgium | 17,456 | 39,714 | 18,898 | 16,066 | 58,795 |
| Spanish Mainland | 13,676 | 38,428 | 13,176 | 17,839 | 43,622 |
| Switzerland | 341 | 0 | 0 | 0 | 3,475 |
| Ireland | 237 | 0 | 0 | 0 | 1,140 |
| Italy | 0 | 0 | 0 | 0 | 1,087 |
| Denmark | 0 | 0 | 0 | 0 | 548 |
| United Kingdom | 0 | 190 | 1,232 | 4,041 | 511 |
| France | 0 | 0 | 0 | 281 | 0 |



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.

Why do they choose the Canary Islands?

| Aspects influencing the choice | 2012 | 2013 | 2014 | 2015 | 2016 |
|-----------------------------------|-------|-------|-------|-------|-------|
| Climate/sun | 95.5% | 94.5% | 94.6% | 95.9% | 94.5% |
| Beaches | 41.7% | 41.0% | 40.9% | 41.0% | 38.2% |
| Tranquillity/rest/relaxation | 35.1% | 35.2% | 35.6% | 35.2% | 35.1% |
| Scenery | 22.1% | 18.1% | 25.5% | 24.9% | 18.9% |
| Price | 13.4% | 15.1% | 13.6% | 13.9% | 13.1% |
| Visiting new places | 12.7% | 8.8% | 10.7% | 12.9% | 12.9% |
| Security | 2.9% | 4.1% | 4.8% | 7.7% | 11.8% |
| Suitable destination for children | 5.4% | 6.8% | 7.0% | 5.1% | 7.0% |
| Active tourism | 3.5% | 4.5% | 4.7% | 4.2% | 5.3% |
| Quality of the environment | 5.2% | 5.6% | 3.8% | 4.4% | 4.7% |
| Ease of travel | 1.2% | 3.3% | 2.1% | 1.7% | 4.2% |
| Nightlife/fun | 6.4% | 6.1% | 4.0% | 3.1% | 4.0% |
| Shopping | 7.7% | 3.1% | 5.7% | 6.5% | 4.0% |
| Culture | 3.1% | 2.6% | 3.1% | 2.7% | 3.8% |
| Nautical activities | 2.0% | 2.0% | 2.9% | 1.8% | 2.3% |
| Theme parks | 1.0% | 1.3% | 1.9% | 1.6% | 1.5% |

* Multi-choice question

What did motivate them to come?

| Aspects motivating the choice | 2012 | 2013 | 2014 | 2015 | 2016 |
|--|-------|-------|-------|-------|-------|
| Previous visits to the Canary Islands | 63.5% | 63.8% | 60.5% | 60.9% | 57.5% |
| Recommendation by friends or relatives | 27.7% | 28.2% | 26.9% | 27.2% | 28.0% |
| The Canary Islands television channel | 0.5% | 0.2% | 0.4% | 0.3% | 0.1% |
| Other television or radio channels | 0.6% | 0.2% | 0.7% | 0.3% | 0.6% |
| Information in the press/magazines/books | 5.2% | 3.5% | 4.7% | 3.2% | 4.9% |
| Attendance at a tourism fair | 0.7% | 2.0% | 0.7% | 0.9% | 1.4% |
| Tour Operator's brochure or catalogue | 8.9% | 5.4% | 6.5% | 7.5% | 6.5% |
| Recommendation by Travel Agency | 12.4% | 14.0% | 11.3% | 11.6% | 12.8% |
| Information obtained via the Internet | 30.7% | 29.8% | 31.3% | 32.1% | 34.1% |
| Senior Tourism programme | 0.0% | 0.0% | 0.1% | 0.1% | 0.0% |
| Others | 5.1% | 7.5% | 4.6% | 4.6% | 4.8% |

* Multi-choice question

