

Tourist profile trend (2016)

Netherlands: Fourth Quarter

How many are they and how much do they spend?



| | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|--------------------------------------|---------|---------|---------|---------|---------|
| Tourist arrivals (> 16 years old) | 100,626 | 107,740 | 104,058 | 116,537 | 133,898 |
| Average daily expenditure (€) | 121.82 | 125.67 | 129.87 | 125.33 | 132.30 |
| . in their place of residence | 85.33 | 85.54 | 91.76 | 88.13 | 94.69 |
| . in the Canary Islands | 36.49 | 40.13 | 38.11 | 37.20 | 37.61 |
| Average length of stay | 9.48 | 9.24 | 9.21 | 8.78 | 8.35 |
| Turnover per tourist (€) | 1,083 | 1,048 | 1,064 | 1,011 | 1,073 |
| Total turnover (> 16 years old) (€m) | 109 | 113 | 111 | 118 | 144 |
| Share of total turnover | 24.7% | 26.0% | 25.6% | 25.8% | 25.8% |
| Share of total tourist | 25.6% | 26.4% | 25.9% | 27.4% | 24.8% |

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

| | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|-------------------------------------|--------|--------|--------|--------|--------|
| Accommodation (**): | 29.72 | 66.24 | 33.69 | 35.18 | 37.23 |
| - Accommodation | 24.68 | 60.20 | 28.99 | 29.69 | 30.46 |
| - Additional accommodation expenses | 5.04 | 6.04 | 4.70 | 5.49 | 6.76 |
| Transport: | 22.24 | 27.80 | 25.21 | 26.20 | 21.62 |
| - Public transport | 3.65 | 8.81 | 3.25 | 3.32 | 3.05 |
| - Taxi | 6.00 | 3.77 | 5.58 | 5.23 | 7.78 |
| - Car rental | 12.59 | 15.22 | 16.38 | 17.66 | 10.79 |
| Food and drink: | 177.37 | 129.48 | 174.39 | 160.16 | 150.10 |
| - Food purchases at supermarkets | 70.56 | 51.48 | 66.95 | 67.08 | 42.78 |
| - Restaurants | 106.81 | 78.00 | 107.44 | 93.08 | 107.32 |
| Souvenirs: | 46.75 | 53.30 | 48.22 | 36.73 | 55.17 |
| Leisure: | 38.62 | 58.53 | 26.43 | 30.28 | 25.93 |
| - Organized excursions | 15.76 | 37.61 | 11.96 | 15.18 | 12.91 |
| - Leisure, amusement | 2.40 | 1.84 | 4.45 | 4.09 | 3.35 |
| - Trip to other islands | 0.52 | 0.00 | 0.59 | 0.89 | 0.57 |
| - Sporting activities | 5.49 | 3.43 | 2.39 | 4.69 | 4.59 |
| - Cultural activities | 5.05 | 0.51 | 3.66 | 2.47 | 2.24 |
| - Discos and disco-pubs | 9.41 | 15.14 | 3.37 | 2.96 | 2.26 |
| Others: | 20.15 | 13.00 | 14.44 | 11.52 | 26.95 |
| - Wellness | 2.87 | 2.64 | 3.49 | 2.24 | 4.27 |
| - Medical expenses | 2.99 | 1.35 | 2.30 | 2.11 | 1.18 |
| - Other expenses | 14.29 | 9.01 | 8.65 | 7.17 | 21.50 |

How far in advance do they book their trip?



| | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|-------------------------|--------|--------|--------|--------|--------|
| The same day they leave | 0.3% | 2.3% | 0.5% | 0.9% | 1.4% |
| Between 2 and 7 days | 6.2% | 13.7% | 11.6% | 8.3% | 4.7% |
| Between 8 and 15 days | 17.5% | 18.2% | 13.9% | 14.2% | 3.1% |
| Between 16 and 30 days | 15.8% | 12.6% | 14.4% | 16.6% | 16.1% |
| Between 31 and 90 days | 38.4% | 30.8% | 36.9% | 39.6% | 46.3% |
| More than 90 days | 21.8% | 22.5% | 22.8% | 20.5% | 28.3% |

What do they book at their place of residence?



| | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|--|--------|--------|--------|--------|--------|
| Flight only | 3.8% | 4.2% | 5.2% | 4.4% | 4.7% |
| Flight and accommodation (room only) | 36.7% | 35.7% | 34.3% | 35.3% | 31.7% |
| Flight and accommodation (B&B) | 9.7% | 8.1% | 14.9% | 8.2% | 8.6% |
| Flight and accommodation (half board) | 19.8% | 25.1% | 16.6% | 19.1% | 22.4% |
| Flight and accommodation (full board) | 2.1% | 0.7% | 2.0% | 2.4% | 3.6% |
| Flight and accommodation (all inclusive) | 27.9% | 26.3% | 27.0% | 30.7% | 29.1% |
| % Tourists using low-cost airlines | 22.6% | 37.3% | 28.3% | 36.7% | 35.2% |
| Other expenses in their place of residence: | | | | | |
| - Car rental | 13.4% | 16.9% | 11.8% | 15.6% | 11.9% |
| - Sporting activities | 5.3% | 1.6% | 4.3% | 3.7% | 2.0% |
| - Excursions | 0.6% | 6.2% | 2.1% | 4.5% | 2.2% |
| - Trip to other islands | 0.0% | 0.0% | 0.0% | 1.5% | 1.1% |

How do they book?



| | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|--------------------------------------|--------|--------|--------|--------|--------|
| Accommodation booking | | | | | |
| Tour Operator | 54.7% | 41.6% | 54.8% | 55.5% | 48.4% |
| - Tour Operator's website | 82.4% | 89.3% | 86.4% | 87.4% | 77.0% |
| Accommodation | 9.6% | 10.7% | 8.8% | 8.6% | 9.7% |
| - Accommodation's website | 67.0% | 80.8% | 85.0% | 88.9% | 94.9% |
| Travel agency (High street) | 28.1% | 28.0% | 23.0% | 16.7% | 26.7% |
| Online Travel Agency (OTA) | 6.6% | 18.1% | 11.1% | 16.7% | 13.5% |
| No need to book accommodation | 1.0% | 1.6% | 2.3% | 2.5% | 1.8% |

Flight booking

| | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|------------------------------------|--------|--------|--------|--------|--------|
| Tour Operator | 58.3% | 48.2% | 56.8% | 53.7% | 53.2% |
| - Tour Operator's website | 77.3% | 73.3% | 81.2% | 86.1% | 75.2% |
| Airline | 11.5% | 16.7% | 15.9% | 15.4% | 17.1% |
| - Airline's website | 95.3% | 100.0% | 96.1% | 98.2% | 97.3% |
| Travel agency (High street) | 26.3% | 22.7% | 18.4% | 17.9% | 21.8% |
| Online Travel Agency (OTA) | 3.9% | 12.4% | 8.9% | 13.0% | 7.9% |

Where do they stay?



| | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|---|--------|--------|--------|--------|--------|
| 5* Hotel | 7.3% | 10.3% | 4.4% | 5.3% | 5.5% |
| 4* Hotel | 34.4% | 35.8% | 35.0% | 29.0% | 34.8% |
| 1-2-3* Hotel | 19.4% | 17.4% | 18.5% | 20.1% | 17.8% |
| Apartment | 37.6% | 33.9% | 39.4% | 43.6% | 39.1% |
| Property (privately-owned, friends, family) | 0.4% | 0.6% | 1.3% | 1.2% | 1.5% |
| Others | 0.9% | 2.0% | 1.4% | 0.7% | 1.3% |

Who are they?



| | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|---------------------|--------|--------|--------|--------|--------|
| Gender | | | | | |
| Percentage of men | 44.5% | 64.5% | 48.8% | 51.2% | 47.9% |
| Percentage of women | 55.5% | 35.5% | 51.2% | 48.8% | 52.1% |

Age

| | | | | | |
|---------------------------------------|------|------|------|------|------|
| Average age (tourists > 16 years old) | 47.3 | 43.6 | 46.4 | 47.4 | 45.5 |
| Standard deviation | 14.1 | 13.3 | 13.9 | 14.0 | 15.2 |

Age range (> 16 years old)

| | | | | | |
|-------------------|-------|-------|-------|-------|-------|
| 16-24 years old | 5.1% | 9.7% | 8.0% | 6.0% | 10.3% |
| 25-30 years old | 13.9% | 8.2% | 9.8% | 9.8% | 9.9% |
| 31-45 years old | 20.9% | 38.1% | 26.8% | 25.3% | 28.9% |
| 46-60 years old | 43.6% | 33.7% | 39.5% | 40.8% | 35.3% |
| Over 60 years old | 16.5% | 10.3% | 15.9% | 18.0% | 15.7% |

Occupation

| | | | | | |
|----------------------------------|-------|-------|-------|-------|-------|
| Business owner or self-employed | 19.4% | 26.6% | 22.1% | 23.9% | 20.8% |
| Upper/Middle management employee | 48.6% | 39.1% | 50.0% | 45.6% | 44.0% |
| Auxiliary level employee | 9.4% | 12.8% | 10.0% | 10.2% | 8.1% |
| Students | 4.5% | 7.6% | 3.5% | 4.4% | 10.3% |
| Retired | 15.3% | 9.1% | 11.7% | 14.2% | 13.7% |
| Unemployed / unpaid dom. work | 2.9% | 4.8% | 2.7% | 1.7% | 3.0% |

Annual household income level

| | | | | | |
|-------------------|-------|-------|-------|-------|-------|
| €12,000 - €24,000 | 12.3% | 12.8% | 9.0% | 12.9% | 12.7% |
| €24,001 - €36,000 | 25.2% | 20.1% | 15.3% | 17.6% | 18.0% |
| €36,001 - €48,000 | 17.6% | 22.3% | 17.4% | 17.5% | 19.5% |
| €48,001 - €60,000 | 15.0% | 10.9% | 18.6% | 19.5% | 18.4% |
| €60,001 - €72,000 | 10.0% | 11.4% | 9.3% | 9.8% | 10.1% |
| €72,001 - €84,000 | 7.7% | 5.0% | 7.3% | 7.8% | 7.2% |
| More than €84,000 | 12.2% | 17.5% | 23.1% | 14.8% | 14.1% |

(*) 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 (2016)

Netherlands: Fourth Quarter

Which island do they choose?



| Tourists (> 16 years old) | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|---------------------------|--------|--------|--------|--------|--------|
| - Lanzarote | 11,773 | 14,978 | 16,379 | 20,098 | 22,574 |
| - Fuerteventura | 10,633 | 10,424 | 10,338 | 11,418 | 13,224 |
| - Gran Canaria | 41,812 | 44,673 | 40,222 | 45,656 | 53,569 |
| - Tenerife | 32,022 | 34,438 | 33,254 | 34,560 | 39,008 |
| - La Palma | 3,552 | 3,227 | 3,595 | 3,792 | 5,523 |

| Share (%) | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|-----------------|--------|--------|--------|--------|--------|
| - Lanzarote | 11.8% | 13.9% | 15.8% | 17.4% | 16.9% |
| - Fuerteventura | 10.7% | 9.7% | 10.0% | 9.9% | 9.9% |
| - Gran Canaria | 41.9% | 41.5% | 38.8% | 39.5% | 40.0% |
| - Tenerife | 32.1% | 32.0% | 32.0% | 29.9% | 29.1% |
| - La Palma | 3.6% | 3.0% | 3.5% | 3.3% | 4.1% |

Who do they come with?



| | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|--|--------|--------|--------|--------|--------|
| Unaccompanied | 6.1% | 18.1% | 7.4% | 4.9% | 7.1% |
| Only with partner | 58.8% | 41.9% | 53.6% | 57.8% | 47.8% |
| Only with children (under the age of 13) | 0.4% | 3.5% | 1.1% | 0.8% | 0.3% |
| Partner + children (under the age of 13) | 7.0% | 12.2% | 14.4% | 10.1% | 12.8% |
| Other relatives | 5.1% | 2.8% | 4.6% | 6.5% | 7.2% |
| Friends | 8.1% | 3.3% | 3.2% | 4.6% | 6.1% |
| Work colleagues | 0.5% | 0.0% | 0.5% | 0.0% | 0.0% |
| Other combinations ⁽¹⁾ | 14.0% | 18.2% | 15.3% | 15.2% | 18.7% |

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

How do they rate the destination?



| Impression of their stay | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|--------------------------------|--------|--------|--------|--------|--------|
| Good or very good (% tourists) | 94.1% | 92.8% | 96.2% | 92.4% | 94.5% |
| Average rating (scale 1-10) | 8.37 | 8.50 | 8.57 | 8.42 | 8.56 |

How many are loyal to the destination?

| Repeat tourists of the Canary Islands | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|---------------------------------------|--------|--------|--------|--------|--------|
| Repeat tourists | 74.4% | 70.8% | 73.7% | 76.4% | 76.2% |
| In love (at least 10 previous visits) | 17.3% | 14.4% | 18.5% | 12.2% | 15.3% |

Where does the flight come from?



| Ten main origin countries | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|---------------------------|--------|--------|--------|--------|--------|
| Netherlands | 86.1% | 36.5% | 75.8% | 76.7% | 66.7% |
| Germany | 5.4% | 39.2% | 11.4% | 15.0% | 16.8% |
| Belgium | 3.5% | 17.7% | 7.6% | 3.4% | 11.0% |
| Spanish Mainland | 5.0% | 6.5% | 4.9% | 4.6% | 4.3% |
| Italy | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% |
| Denmark | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% |
| Poland | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% |
| United Kingdom | 0.0% | 0.1% | 0.2% | 0.2% | 0.0% |
| Others | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% |
| Finland | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |



Why do they choose the Canary Islands?



| Aspects influencing the choice | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|-----------------------------------|--------|--------|--------|--------|--------|
| Climate/sun | 94.2% | 94.0% | 94.3% | 96.8% | 96.9% |
| Tranquillity/rest/relaxation | 35.3% | 36.0% | 39.2% | 36.0% | 40.4% |
| Beaches | 36.0% | 40.9% | 35.0% | 44.6% | 37.5% |
| Scenery | 22.2% | 17.6% | 26.0% | 28.9% | 18.0% |
| Price | 14.0% | 9.3% | 12.1% | 13.1% | 16.4% |
| Visiting new places | 10.5% | 7.5% | 11.9% | 11.7% | 10.9% |
| Security | 2.6% | 6.1% | 5.1% | 11.0% | 9.9% |
| Quality of the environment | 5.9% | 9.5% | 3.9% | 4.8% | 5.6% |
| Shopping | 9.1% | 1.3% | 5.4% | 4.8% | 5.5% |
| Nightlife/fun | 6.5% | 6.4% | 4.2% | 1.7% | 5.3% |
| Active tourism | 3.6% | 5.8% | 3.9% | 4.1% | 4.5% |
| Ease of travel | 1.0% | 4.6% | 1.4% | 1.1% | 4.0% |
| Suitable destination for children | 3.9% | 7.8% | 8.2% | 4.2% | 3.6% |
| Nautical activities | 2.8% | 2.4% | 1.8% | 1.2% | 2.8% |
| Culture | 3.7% | 0.7% | 2.2% | 2.7% | 2.4% |
| Theme parks | 1.1% | 1.7% | 1.8% | 1.2% | 2.2% |

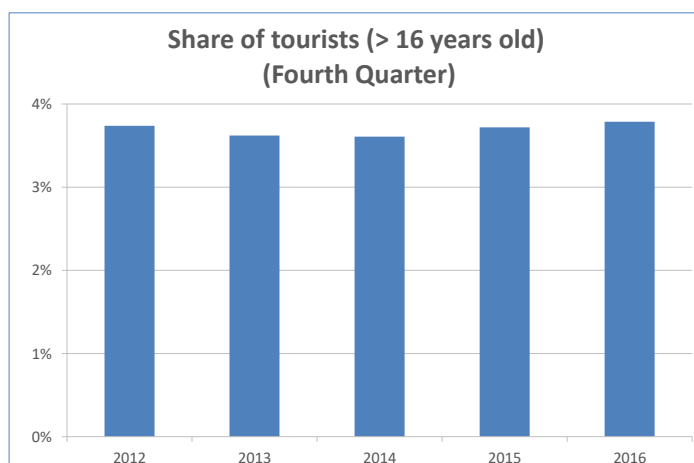
* Multi-choice question

What did motivate them to come?



| Aspects motivating the choice | 2012Q4 | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 |
|--|--------|--------|--------|--------|--------|
| Previous visits to the Canary Islands | 65.4% | 63.2% | 62.6% | 64.4% | 66.0% |
| Recommendation by friends or relatives | 27.3% | 34.9% | 27.0% | 24.5% | 23.1% |
| The Canary Islands television channel | 0.6% | 0.0% | 0.2% | 0.0% | 0.0% |
| Other television or radio channels | 0.7% | 0.0% | 0.3% | 0.3% | 0.1% |
| Information in the press/magazines/books | 4.8% | 1.2% | 4.2% | 4.8% | 2.0% |
| Attendance at a tourism fair | 0.3% | 1.9% | 1.2% | 0.5% | 1.6% |
| Tour Operator's brochure or catalogue | 10.2% | 3.7% | 5.6% | 5.8% | 6.2% |
| Recommendation by Travel Agency | 11.3% | 12.1% | 10.5% | 9.5% | 11.9% |
| Information obtained via the Internet | 31.3% | 23.2% | 30.7% | 34.3% | 30.7% |
| Senior Tourism programme | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Others | 4.8% | 10.2% | 5.6% | 5.3% | 4.3% |

* Multi-choice question



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.