

Tourist profile trend (2016)

Netherlands: First Quarter

How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	107,364	110,281	114,725	105,210	131,526
Average daily expenditure (€)	121.90	126.47	114.48	121.45	120.74
. in their place of residence	85.24	89.11	78.09	84.63	85.01
. in the Canary Islands	36.66	37.36	36.40	36.82	35.72
Average length of stay	11.32	9.82	11.03	10.52	9.17
Turnover per tourist (€)	1,187	1,153	1,107	1,156	1,053
Total turnover (> 16 years old) (€m)	127	127	127	122	139
Share of total turnover	28.9%	29.3%	29.4%	26.6%	24.8%
Share of total tourist	27.3%	27.1%	28.5%	24.7%	24.3%

Expenditure in the Canary Islands per tourist and trip (€) ^(*)					
Accommodation (**):	45.61	43.80	55.94	50.82	37.06
- Accommodation	37.66	38.22	50.43	44.58	31.93
- Additional accommodation expenses	7.94	5.58	5.51	6.24	5.13
Transport:	32.35	30.70	23.53	36.18	27.37
- Public transport	5.40	8.93	5.83	7.06	3.07
- Taxi	8.45	2.12	5.66	7.47	5.66
- Car rental	18.50	19.66	12.04	21.65	18.65
Food and drink:	180.61	180.82	177.46	192.26	145.81
- Food purchases at supermarkets	72.31	63.47	73.41	85.05	70.10
- Restaurants	108.30	117.35	104.05	107.21	75.71
Souvenirs:	49.82	62.46	61.01	51.98	51.81
Leisure:	31.01	16.30	26.52	27.53	28.35
- Organized excursions	14.06	4.56	10.29	12.93	15.13
- Leisure, amusement	2.73	0.37	2.07	2.08	0.53
- Trip to other islands	1.00	0.21	0.90	1.23	1.55
- Sporting activities	3.31	9.64	6.47	5.51	6.90
- Cultural activities	2.35	1.09	2.40	1.55	3.19
- Discos and disco-pubs	7.56	0.42	4.37	4.24	1.06
Others:	31.65	14.60	12.83	8.77	11.63
- Wellness	2.97	1.92	2.55	1.21	3.99
- Medical expenses	1.52	2.92	2.27	2.76	0.55
- Other expenses	27.16	9.75	8.01	4.80	7.09

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	1.1%	0.0%	0.6%	0.0%	0.8%
Between 2 and 7 days	8.6%	9.5%	5.6%	9.0%	9.7%
Between 8 and 15 days	16.3%	9.3%	11.7%	18.9%	11.9%
Between 16 and 30 days	18.7%	12.8%	15.8%	13.9%	19.0%
Between 31 and 90 days	31.0%	43.6%	33.9%	32.9%	39.5%
More than 90 days	24.4%	24.8%	32.4%	25.4%	19.2%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	7.1%	7.7%	7.3%	6.3%	5.9%
Flight and accommodation (room only)	34.2%	39.7%	34.0%	38.2%	26.7%
Flight and accommodation (B&B)	8.2%	9.9%	10.4%	9.3%	11.5%
Flight and accommodation (half board)	25.4%	22.9%	18.7%	19.2%	26.4%
Flight and accommodation (full board)	3.0%	0.5%	2.4%	2.2%	2.3%
Flight and accommodation (all inclusive)	22.1%	19.3%	27.2%	24.8%	27.2%
% Tourists using low-cost airlines	20.7%	38.1%	32.1%	32.0%	49.2%
Other expenses in their place of residence:					
- Car rental	13.5%	20.7%	13.0%	11.9%	14.5%
- Sporting activities	4.2%	6.7%	2.3%	2.1%	4.2%
- Excursions	1.5%	0.2%	3.2%	1.1%	4.1%
- Trip to other islands	0.4%	4.0%	0.4%	0.5%	0.3%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	66.5%	57.1%	51.9%	48.8%	41.5%
- Tour Operator's website	77.3%	89.9%	81.6%	82.7%	71.2%
Accommodation	5.5%	14.5%	12.0%	9.9%	13.0%
- Accommodation's website	75.4%	55.8%	84.0%	91.2%	79.9%
Travel agency (High street)	17.5%	20.2%	22.2%	21.9%	18.3%
Online Travel Agency (OTA)	8.0%	8.0%	10.0%	17.7%	25.2%
No need to book accommodation	2.5%	0.2%	3.9%	1.8%	2.1%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight booking					
Tour Operator	74.3%	61.0%	51.4%	47.3%	42.8%
- Tour Operator's website	71.5%	86.3%	78.0%	75.1%	61.7%
Airline	9.6%	21.7%	18.9%	18.1%	21.5%
- Airline's website	97.3%	100.0%	96.4%	96.2%	100.0%
Travel agency (High street)	11.7%	16.4%	20.4%	19.0%	15.3%
Online Travel Agency (OTA)	4.4%	0.9%	9.2%	15.6%	20.4%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	7.2%	10.9%	3.8%	4.9%	3.3%
4* Hotel	32.8%	42.2%	34.6%	28.0%	40.1%
1-2-3* Hotel	14.8%	10.6%	16.4%	19.7%	19.0%
Apartment	42.6%	35.8%	41.5%	44.3%	35.1%
Property (privately-owned, friends, family)	1.2%	0.1%	2.8%	1.5%	1.8%
Others	1.4%	0.5%	0.9%	1.5%	0.7%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	50.9%	72.8%	50.2%	54.5%	50.7%
Percentage of women	49.1%	27.2%	49.8%	45.5%	49.3%

Age					
Average age (tourists > 16 years old)	52.8	50.7	50.9	53.5	50.4
Standard deviation	13.6	14.4	14.1	14.5	16.3

Age range (> 16 years old)					
16-24 years old	2.2%	2.0%	4.3%	4.6%	5.2%
25-30 years old	5.4%	8.9%	6.4%	5.3%	12.0%
31-45 years old	21.4%	24.3%	23.0%	18.5%	21.8%
46-60 years old	37.5%	31.6%	39.6%	34.3%	25.8%
Over 60 years old	33.4%	33.3%	26.7%	37.2%	35.2%

Occupation					
Business owner or self-employed	21.0%	44.2%	24.4%	21.4%	23.8%
Upper/Middle management employee	39.3%	19.6%	42.6%	37.8%	33.5%
Auxiliary level employee	5.9%	9.4%	6.2%	9.3%	7.3%
Students	1.4%	2.7%	1.6%	1.6%	10.8%
Retired	30.6%	20.9%	21.7%	26.5%	23.1%
Unemployed / unpaid dom. work	1.7%	3.2%	3.5%	3.4%	1.5%

Annual household income level					
€12,000 - €24,000	10.1%	7.0%	10.1%	6.4%	11.1%
€24,001 - €36,000	20.6%	18.7%	16.2%	18.5%	16.1%
€36,001 - €48,000	20.7%	8.4%	21.4%	29.3%	22.4%
€48,001 - €60,000	19.6%	17.0%	13.7%	18.9%	15.7%
€60,001 - €72,000	8.5%	4.1%	13.6%	9.4%	10.7%
€72,001 - €84,000	6.6%	6.1%	6.6%	6.2%	8.8%
More than €84,000	14.0%	38.8%	18.4%	11.3%	15.3%

(*) 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.

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Which island do they choose?



Tourists (> 16 years old)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	14,775	15,217	16,638	16,365	21,248
- Fuerteventura	10,598	15,881	10,152	11,204	14,439
- Gran Canaria	43,871	41,386	45,013	40,524	48,354
- Tenerife	33,561	33,651	38,284	32,093	41,116
- La Palma	4,189	4,000	3,784	4,087	5,370

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	13.8%	13.8%	14.6%	15.7%	16.3%
- Fuerteventura	9.9%	14.4%	8.9%	10.7%	11.1%
- Gran Canaria	41.0%	37.6%	39.5%	38.9%	37.0%
- Tenerife	31.4%	30.6%	33.6%	30.8%	31.5%
- La Palma	3.9%	3.6%	3.3%	3.9%	4.1%

Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	5.8%	5.0%	10.0%	9.6%	9.3%
Only with partner	65.9%	67.1%	50.9%	64.7%	63.9%
Only with children (under the age of 13)	0.5%	0.0%	0.6%	0.5%	0.0%
Partner + children (under the age of 13)	6.3%	5.5%	8.9%	5.8%	7.0%
Other relatives	4.6%	1.8%	3.8%	3.7%	4.9%
Friends	4.4%	4.5%	5.8%	6.0%	5.2%
Work colleagues	0.0%	0.1%	0.0%	0.0%	0.7%
Other combinations ⁽¹⁾	12.4%	16.0%	19.9%	9.7%	8.9%

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

How do they rate the destination?



Impression of their stay	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Good or very good (% tourists)	90.9%	79.6%	96.3%	92.8%	92.8%
Average rating (scale 1-10)	8.29	8.02	8.50	8.36	8.46

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	82.3%	86.3%	82.0%	83.7%	79.4%
In love (at least 10 previous visits)	15.2%	21.7%	21.3%	21.2%	12.9%

Where does the flight come from?



Ten main origin countries	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Netherlands	82.3%	38.6%	82.1%	81.4%	42.0%
Germany	7.1%	47.6%	10.4%	8.5%	35.6%
Spanish Mainland	4.6%	13.6%	2.8%	4.9%	10.1%
Belgium	5.5%	0.1%	3.6%	5.2%	9.1%
Switzerland	0.3%	0.0%	0.0%	0.0%	2.6%
Ireland	0.0%	0.0%	0.0%	0.0%	0.6%
United Kingdom	0.0%	0.0%	0.6%	0.0%	0.0%
Others	0.3%	0.1%	0.5%	0.0%	0.0%
Denmark	0.0%	0.0%	0.0%	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	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	96.1%	99.4%	96.9%	94.7%	94.1%
Tranquillity/rest/relaxation	36.5%	34.0%	35.2%	35.8%	38.5%
Beaches	35.7%	33.6%	39.7%	31.0%	29.6%
Scenery	25.3%	21.5%	28.9%	28.7%	23.7%
Price	13.2%	17.0%	11.4%	13.5%	12.0%
Visiting new places	10.9%	9.9%	5.6%	8.3%	11.0%
Security	3.5%	3.1%	5.0%	5.2%	9.1%
Ease of travel	1.1%	5.3%	4.2%	2.1%	6.2%
Quality of the environment	6.1%	6.4%	4.0%	5.0%	5.9%
Active tourism	3.8%	1.5%	4.5%	3.6%	5.1%
Culture	2.9%	1.6%	3.2%	1.9%	4.3%
Nautical activities	0.7%	0.6%	1.8%	1.2%	3.4%
Shopping	5.9%	4.4%	5.1%	6.7%	2.1%
Nightlife/fun	4.5%	7.9%	2.8%	3.5%	1.8%
Suitable destination for children	4.6%	5.4%	4.2%	2.4%	1.3%
Golf	2.0%	2.3%	1.7%	2.8%	0.9%

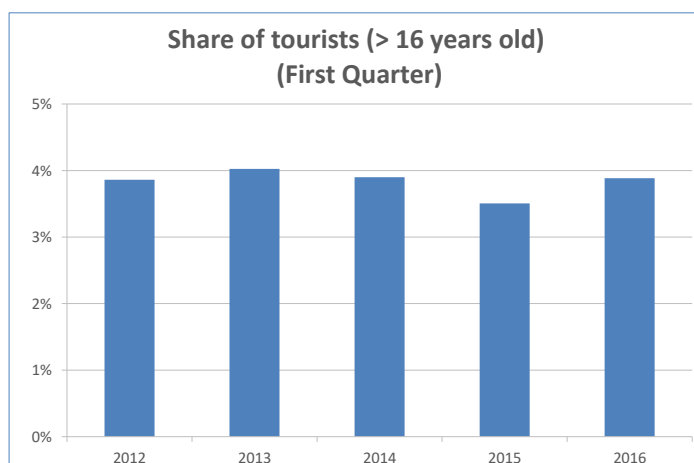
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	73.1%	78.4%	73.9%	74.7%	65.6%
Recommendation by friends or relatives	23.1%	24.9%	25.5%	23.5%	22.8%
The Canary Islands television channel	0.5%	0.0%	0.0%	0.4%	0.0%
Other television or radio channels	0.6%	0.0%	0.6%	0.3%	1.9%
Information in the press/magazines/books	5.9%	1.5%	4.2%	3.4%	6.8%
Attendance at a tourism fair	0.9%	1.4%	0.4%	1.3%	1.4%
Tour Operator's brochure or catalogue	5.6%	3.1%	6.0%	4.9%	7.7%
Recommendation by Travel Agency	10.6%	8.8%	7.0%	9.8%	13.6%
Information obtained via the Internet	27.7%	20.1%	23.6%	17.1%	30.3%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	6.4%	3.2%	4.0%	5.8%	5.4%

* 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.