

Tourist profile trend (2016)

Netherlands: Second Quarter

How many are they and how much do they spend?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Tourist arrivals (> 16 years old)	75,412	83,148	80,854	89,526	124,827
Average daily expenditure (€)	115.71	115.05	110.18	115.23	107.71
. in their place of residence	82.43	81.09	81.17	83.69	80.72
. in the Canary Islands	33.28	33.97	29.01	31.54	27.00
Average length of stay	9.51	8.18	9.64	8.88	8.36
Turnover per tourist (€)	1,013	902	977	961	863
Total turnover (> 16 years old) (€m)	76	75	79	86	108
Share of total turnover	17.3%	17.3%	18.3%	18.8%	19.3%
Share of total tourist	19.2%	20.4%	20.1%	21.0%	23.1%

Expenditure in the Canary Islands per tourist and trip (€) (**)					
Accommodation (**):	23.17	44.29	24.15	41.34	28.86
- Accommodation	18.46	34.44	18.38	32.14	25.24
- Additional accommodation expenses	4.71	9.85	5.77	9.20	3.61
Transport:	24.86	26.02	24.90	21.92	19.20
- Public transport	2.61	5.39	3.42	2.62	2.31
- Taxi	7.87	7.09	4.66	4.70	4.61
- Car rental	14.39	13.54	16.82	14.60	12.28
Food and drink:	147.95	121.05	132.69	122.00	106.31
- Food purchases at supermarkets	59.79	46.50	57.96	42.72	40.54
- Restaurants	88.16	74.56	74.73	79.29	65.77
Souvenirs:	46.82	41.84	38.46	45.77	34.18
Leisure:	35.40	25.36	30.70	23.58	22.01
- Organized excursions	17.86	9.54	13.56	14.22	9.18
- Leisure, amusement	5.06	8.13	5.98	3.07	3.43
- Trip to other islands	1.41	0.51	1.22	0.65	1.67
- Sporting activities	3.39	1.43	5.40	2.30	4.05
- Cultural activities	2.32	2.83	3.08	1.67	3.15
- Discos and disco-pubs	5.36	2.91	1.47	1.66	0.55
Others:	21.60	13.90	6.25	10.62	11.17
- Wellness	2.48	1.62	1.52	1.05	0.62
- Medical expenses	1.25	0.50	0.43	0.69	1.30
- Other expenses	17.87	11.78	4.30	8.88	9.25

How far in advance do they book their trip?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
The same day they leave	0.2%	1.7%	0.0%	0.4%	0.0%
Between 2 and 7 days	11.7%	8.4%	9.0%	9.0%	8.6%
Between 8 and 15 days	17.5%	13.7%	14.8%	12.9%	7.5%
Between 16 and 30 days	10.8%	14.0%	17.6%	11.7%	7.2%
Between 31 and 90 days	33.2%	28.5%	28.0%	37.1%	36.0%
More than 90 days	26.6%	33.7%	30.7%	28.9%	40.7%

What do they book at their place of residence?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Flight only	4.9%	10.8%	5.2%	3.5%	3.5%
Flight and accommodation (room only)	31.0%	28.8%	34.3%	27.1%	31.0%
Flight and accommodation (B&B)	10.2%	11.8%	6.4%	10.9%	10.6%
Flight and accommodation (half board)	26.0%	21.7%	22.0%	22.1%	12.2%
Flight and accommodation (full board)	1.4%	1.7%	2.6%	1.9%	2.3%
Flight and accommodation (all inclusive)	26.6%	25.2%	29.5%	34.5%	40.4%
% Tourists using low-cost airlines	21.0%	39.4%	34.4%	27.7%	44.7%
Other expenses in their place of residence:					
- Car rental	11.0%	12.0%	12.1%	11.8%	12.7%
- Sporting activities	2.2%	4.4%	3.5%	4.5%	6.9%
- Excursions	1.1%	6.2%	1.7%	2.0%	3.9%
- Trip to other islands	0.5%	2.1%	0.4%	0.6%	0.4%

How do they book?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Accommodation booking					
Tour Operator	57.6%	38.5%	50.3%	55.7%	41.2%
- Tour Operator's website	76.7%	74.5%	78.3%	89.2%	70.8%
Accommodation	4.2%	18.4%	6.3%	7.8%	13.8%
- Accommodation's website	92.3%	81.6%	96.7%	100.0%	83.5%
Travel agency (High street)	28.2%	29.3%	27.8%	22.1%	30.4%
Online Travel Agency (OTA)	8.5%	10.7%	13.7%	12.7%	12.5%
No need to book accommodation	1.5%	3.0%	1.9%	1.8%	2.1%

	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Flight booking					
Tour Operator	64.6%	43.1%	52.7%	61.6%	45.7%
- Tour Operator's website	71.9%	62.6%	71.5%	82.9%	65.3%
Airline	9.5%	24.1%	18.4%	12.4%	15.7%
- Airline's website	98.3%	95.1%	95.5%	97.4%	96.3%
Travel agency (High street)	21.7%	24.0%	22.1%	18.0%	25.0%
Online Travel Agency (OTA)	4.2%	8.8%	6.8%	8.1%	13.6%

Where do they stay?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
5* Hotel	5.6%	6.2%	6.0%	5.5%	3.7%
4* Hotel	35.4%	35.3%	32.4%	38.4%	33.5%
1-2-3* Hotel	16.1%	16.3%	16.2%	15.5%	17.3%
Apartment	41.1%	39.3%	42.5%	38.7%	44.0%
Property (privately-owned, friends, family)	1.2%	1.7%	1.9%	1.1%	0.9%
Others	0.6%	1.3%	1.0%	0.9%	0.5%

Who are they?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Gender					
Percentage of men	48.1%	47.5%	52.5%	44.9%	50.8%
Percentage of women	51.9%	52.5%	47.5%	55.1%	49.2%
Age					
Average age (tourists > 16 years old)	48.2	44.6	46.0	47.3	46.3
Standard deviation	13.9	13.4	14.0	14.5	13.4
Age range (> 16 years old)					
16-24 years old	5.7%	7.4%	7.3%	7.7%	4.0%
25-30 years old	8.1%	6.0%	10.4%	7.2%	8.1%
31-45 years old	24.7%	44.3%	30.0%	28.1%	39.1%
46-60 years old	40.3%	28.4%	35.2%	36.1%	33.7%
Over 60 years old	21.2%	13.8%	17.1%	20.8%	15.1%
Occupation					
Business owner or self-employed	18.7%	17.8%	17.8%	20.2%	25.8%
Upper/Middle management employee	49.4%	51.4%	55.0%	51.9%	45.9%
Auxiliary level employee	11.3%	12.1%	8.1%	7.4%	10.0%
Students	3.8%	6.6%	4.9%	3.5%	2.9%
Retired	15.2%	10.0%	12.6%	14.0%	11.8%
Unemployed / unpaid dom. work	1.6%	2.1%	1.6%	3.0%	3.6%
Annual household income level					
€12,000 - €24,000	7.9%	13.6%	10.8%	9.8%	4.7%
€24,001 - €36,000	19.4%	12.6%	22.0%	18.7%	16.0%
€36,001 - €48,000	22.7%	19.6%	16.0%	18.1%	13.4%
€48,001 - €60,000	18.7%	23.9%	16.8%	19.3%	20.4%
€60,001 - €72,000	6.5%	8.4%	13.2%	8.6%	10.1%
€72,001 - €84,000	6.4%	7.4%	6.7%	6.6%	7.1%
More than €84,000	18.6%	14.5%	14.4%	18.9%	28.2%

(*) 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)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	9,784	12,058	13,345	13,367	20,909
- Fuerteventura	6,785	8,241	6,885	10,091	14,110
- Gran Canaria	31,772	34,819	30,968	34,063	44,821
- Tenerife	24,568	25,417	27,738	28,941	39,926
- La Palma	2,315	2,613	1,918	2,834	4,616

Share (%)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	13.0%	14.5%	16.5%	15.0%	16.8%
- Fuerteventura	9.0%	9.9%	8.5%	11.3%	11.3%
- Gran Canaria	42.2%	41.9%	38.3%	38.1%	36.0%
- Tenerife	32.7%	30.6%	34.3%	32.4%	32.1%
- La Palma	3.1%	3.1%	2.4%	3.2%	3.7%

Who do they come with?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Unaccompanied	3.8%	8.6%	8.3%	6.6%	2.7%
Only with partner	56.4%	41.8%	49.1%	48.4%	23.7%
Only with children (under the age of 13)	0.6%	2.0%	2.1%	2.2%	2.6%
Partner + children (under the age of 13)	12.7%	17.4%	13.2%	14.4%	25.2%
Other relatives	2.6%	9.0%	4.4%	7.8%	6.5%
Friends	4.4%	4.4%	4.0%	5.7%	6.6%
Work colleagues	1.3%	0.5%	0.0%	0.3%	0.0%
Other combinations ⁽¹⁾	18.0%	16.3%	18.9%	14.6%	32.5%

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

How do they rate the destination?



Impression of their stay	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Good or very good (% tourists)	92.6%	88.9%	93.9%	97.3%	94.0%
Average rating (scale 1-10)	8.42	8.24	8.49	8.53	8.63

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Repeat tourists	73.8%	75.5%	70.2%	74.0%	69.4%
In love (at least 10 previous visits)	13.6%	13.0%	15.2%	13.8%	12.1%

Where does the flight come from?



Ten main origin countries	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Germany	14.3%	55.1%	16.7%	9.5%	49.1%
Netherlands	77.5%	24.2%	73.8%	78.9%	21.0%
Belgium	6.1%	8.9%	6.4%	5.0%	17.7%
Spanish Mainland	2.0%	11.7%	2.8%	2.8%	10.9%
Others	0.0%	0.0%	0.0%	0.0%	0.6%
United Kingdom	0.0%	0.0%	0.4%	3.8%	0.4%
Ireland	0.0%	0.0%	0.0%	0.0%	0.3%
Switzerland	0.1%	0.0%	0.0%	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	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Climate/sun	96.9%	94.2%	92.6%	94.8%	95.8%
Beaches	45.3%	42.7%	39.0%	39.6%	37.0%
Tranquillity/rest/relaxation	40.6%	34.5%	36.4%	36.5%	32.9%
Scenery	24.5%	25.0%	27.7%	19.0%	18.3%
Suitable destination for children	7.2%	12.2%	7.7%	6.4%	15.4%
Security	2.1%	3.8%	6.3%	7.2%	14.4%
Visiting new places	12.7%	8.8%	13.6%	13.9%	11.6%
Price	12.0%	18.1%	16.7%	16.3%	10.1%
Active tourism	2.3%	3.6%	3.8%	4.0%	6.7%
Quality of the environment	3.5%	2.0%	5.2%	2.5%	5.9%
Ease of travel	2.0%	1.4%	2.0%	3.1%	3.3%
Culture	2.0%	4.0%	3.9%	1.8%	3.1%
Shopping	8.0%	4.0%	4.1%	6.7%	2.9%
Theme parks	1.1%	2.8%	1.1%	1.8%	1.8%
Golf	0.1%	0.0%	0.7%	1.2%	1.4%
Nightlife/fun	2.1%	1.8%	2.2%	2.3%	1.2%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Previous visits to the Canary Islands	66.1%	56.6%	59.1%	61.4%	58.6%
Recommendation by friends or relatives	26.0%	25.5%	25.1%	32.0%	30.1%
The Canary Islands television channel	0.0%	1.0%	0.0%	0.0%	0.3%
Other television or radio channels	0.6%	1.0%	0.3%	0.3%	0.1%
Information in the press/magazines/books	5.8%	6.4%	5.8%	2.4%	5.6%
Attendance at a tourism fair	0.4%	3.8%	0.3%	0.7%	1.9%
Tour Operator's brochure or catalogue	9.5%	9.1%	5.8%	5.6%	6.1%
Recommendation by Travel Agency	14.9%	15.1%	17.5%	10.0%	15.0%
Information obtained via the Internet	29.9%	35.0%	31.0%	33.7%	32.3%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	1.9%	7.6%	3.5%	4.5%	6.8%

* 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.