

# Tourist profile trend (2017)

## Netherlands: Second Quarter

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



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tourist arrivals (> 16 years old)	83,148	80,854	89,526	124,827	126,792
Average daily expenditure (€)	115.05	110.18	115.23	107.71	117.48
. in their place of residence	81.09	81.17	83.69	80.72	86.67
. in the Canary Islands	33.97	29.01	31.54	27.00	30.81
Average length of stay	8.18	9.64	8.88	8.36	8.76
Turnover per tourist (€)	902	977	961	863	975
Total turnover (> 16 years old) (€m)	75.0	79.0	86.1	108	124
Share of total turnover	17.3%	18.3%	18.8%	19.3%	--
Share of total tourist	20.4%	20.1%	21.0%	23.1%	--

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

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
<b>Accommodation (**):</b>	44.29	24.15	41.34	28.86	31.96
- Accommodation	34.44	18.38	32.14	25.24	26.03
- Additional accommodation expenses	9.85	5.77	9.20	3.61	5.93
<b>Transport:</b>	26.02	24.90	21.92	19.20	20.96
- Public transport	5.39	3.42	2.62	2.31	3.64
- Taxi	7.09	4.66	4.70	4.61	5.47
- Car rental	13.54	16.82	14.60	12.28	11.85
<b>Food and drink:</b>	121.05	132.69	122.00	106.31	136.59
- Food purchases at supermarkets	46.50	57.96	42.72	40.54	50.06
- Restaurants	74.56	74.73	79.29	65.77	86.54
<b>Souvenirs:</b>	41.84	38.46	45.77	34.18	39.28
<b>Leisure:</b>	25.36	30.70	23.58	22.01	30.48
- Organized excursions	9.54	13.56	14.22	9.18	16.30
- Leisure, amusement	8.13	5.98	3.07	3.43	4.67
- Trip to other islands	0.51	1.22	0.65	1.67	1.39
- Sporting activities	1.43	5.40	2.30	4.05	1.77
- Cultural activities	2.83	3.08	1.67	3.15	3.77
- Discos and disco-pubs	2.91	1.47	1.66	0.55	2.57
<b>Others:</b>	13.90	6.25	10.62	11.17	10.94
- Wellness	1.62	1.52	1.05	0.62	1.67
- Medical expenses	0.50	0.43	0.69	1.30	0.78
- Other expenses	11.78	4.30	8.88	9.25	8.49

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



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
The same day they leave	1.7%	0.0%	0.4%	0.0%	0.4%
Between 2 and 7 days	8.4%	9.0%	9.0%	8.6%	8.8%
Between 8 and 15 days	13.7%	14.8%	12.9%	7.5%	10.2%
Between 16 and 30 days	14.0%	17.6%	11.7%	7.2%	11.7%
Between 31 and 90 days	28.5%	28.0%	37.1%	36.0%	32.3%
More than 90 days	33.7%	30.7%	28.9%	40.7%	36.6%

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



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight only	10.8%	5.2%	3.5%	3.5%	1.7%
Flight and accommodation (room only)	28.8%	34.3%	27.1%	31.0%	34.6%
Flight and accommodation (B&B)	11.8%	6.4%	10.9%	10.6%	9.5%
Flight and accommodation (half board)	21.7%	22.0%	22.1%	12.2%	21.9%
Flight and accommodation (full board)	1.7%	2.6%	1.9%	2.3%	0.6%
Flight and accommodation (all inclusive)	25.2%	29.5%	34.5%	40.4%	31.8%
<b>% Tourists using low-cost airlines</b>	39.4%	34.4%	27.7%	44.7%	34.1%
<b>Other expenses in their place of residence:</b>					
- Car rental	12.0%	12.1%	11.8%	12.7%	12.9%
- Sporting activities	4.4%	3.5%	4.5%	6.9%	4.0%
- Excursions	6.2%	1.7%	2.0%	3.9%	3.7%
- Trip to other islands	2.1%	0.4%	0.6%	0.4%	0.2%

### How do they book?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
<b>Accommodation booking</b>					
<b>Tour Operator</b>	38.5%	50.3%	55.7%	41.2%	48.7%
- Tour Operator's website	74.5%	78.3%	89.2%	70.8%	82.7%
<b>Accommodation</b>	18.4%	6.3%	7.8%	13.8%	9.7%
- Accommodation's website	81.6%	96.7%	100.0%	83.5%	82.5%
<b>Travel agency (High street)</b>	29.3%	27.8%	22.1%	30.4%	26.8%
<b>Online Travel Agency (OTA)</b>	10.7%	13.7%	12.7%	12.5%	14.0%
<b>No need to book accommodation</b>	3.0%	1.9%	1.8%	2.1%	0.8%

### Flight booking

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
<b>Tour Operator</b>	43.1%	52.7%	61.6%	45.7%	49.3%
- Tour Operator's website	62.6%	71.5%	82.9%	65.3%	82.1%
<b>Airline</b>	24.1%	18.4%	12.4%	15.7%	14.0%
- Airline's website	95.1%	95.5%	97.4%	96.3%	96.1%
<b>Travel agency (High street)</b>	24.0%	22.1%	18.0%	25.0%	26.9%
<b>Online Travel Agency (OTA)</b>	8.8%	6.8%	8.1%	13.6%	9.7%

### Where do they stay?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
5* Hotel	6.2%	6.0%	5.5%	3.7%	4.6%
4* Hotel	35.3%	32.4%	38.4%	33.5%	40.0%
1-2-3* Hotel	16.3%	16.2%	15.5%	17.3%	13.4%
Apartment	39.3%	42.5%	38.7%	44.0%	40.2%
Property (privately-owned, friends, family)	1.7%	1.9%	1.1%	0.9%	0.7%
Others	1.3%	1.0%	0.9%	0.5%	1.1%

### Who are they?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
<b>Gender</b>					
Percentage of men	47.5%	52.5%	44.9%	50.8%	47.6%
Percentage of women	52.5%	47.5%	55.1%	49.2%	52.4%
<b>Age</b>					
Average age (tourists > 16 years old)	44.6	46.0	47.3	46.3	47.1
Standard deviation	13.4	14.0	14.5	13.4	14.7
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	7.4%	7.3%	7.7%	4.0%	7.6%
25-30 years old	6.0%	10.4%	7.2%	8.1%	9.3%
31-45 years old	44.3%	30.0%	28.1%	39.1%	28.4%
46-60 years old	28.4%	35.2%	36.1%	33.7%	32.6%
Over 60 years old	13.8%	17.1%	20.8%	15.1%	22.2%
<b>Occupation</b>					
Business owner or self-employed	17.8%	17.8%	20.2%	25.8%	19.1%
Upper/Middle management employee	51.4%	55.0%	51.9%	45.9%	51.2%
Auxiliary level employee	12.1%	8.1%	7.4%	10.0%	9.6%
Students	6.6%	4.9%	3.5%	2.9%	3.6%
Retired	10.0%	12.6%	14.0%	11.8%	15.3%
Unemployed / unpaid dom. work	2.1%	1.6%	3.0%	3.6%	1.2%
<b>Annual household income level</b>					
€12,000 - €24,000	13.6%	10.8%	9.8%	4.7%	11.2%
€24,001 - €36,000	12.6%	22.0%	18.7%	16.0%	19.0%
€36,001 - €48,000	19.6%	16.0%	18.1%	13.4%	14.6%
€48,001 - €60,000	23.9%	16.8%	19.3%	20.4%	19.4%
€60,001 - €72,000	8.4%	13.2%	8.6%	10.1%	9.7%
€72,001 - €84,000	7.4%	6.7%	6.6%	7.1%	8.2%
More than €84,000	14.5%	14.4%	18.9%	28.2%	17.9%

(\*) 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)

## Netherlands: Second Quarter

### Which island do they choose?



Tourists (> 16 years old)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	12,058	13,345	13,367	20,909	18,429
- Fuerteventura	8,241	6,885	10,091	14,110	15,124
- Gran Canaria	34,819	30,968	34,063	44,821	48,101
- Tenerife	25,417	27,738	28,941	39,926	38,710
- La Palma	2,613	1,918	2,834	4,616	5,838

Share (%)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	14.5%	16.5%	15.0%	16.8%	14.6%
- Fuerteventura	9.9%	8.5%	11.3%	11.3%	12.0%
- Gran Canaria	41.9%	38.3%	38.1%	36.0%	38.1%
- Tenerife	30.6%	34.3%	32.4%	32.1%	30.7%
- La Palma	3.1%	2.4%	3.2%	3.7%	4.6%

### Who do they come with?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Unaccompanied	8.6%	8.3%	6.6%	2.7%	4.3%
Only with partner	41.8%	49.1%	48.4%	23.7%	48.3%
Only with children (under the age of 13)	2.0%	2.1%	2.2%	2.6%	2.3%
Partner + children (under the age of 13)	17.4%	13.2%	14.4%	25.2%	16.2%
Other relatives	9.0%	4.4%	7.8%	6.5%	5.3%
Friends	4.4%	4.0%	5.7%	6.6%	4.3%
Work colleagues	0.5%	0.0%	0.3%	0.0%	0.0%
Other combinations <sup>(1)</sup>	16.3%	18.9%	14.6%	32.5%	19.4%

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

### How do they rate the destination?



Impression of their stay	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Good or very good (% tourists)	88.9%	93.9%	97.3%	94.0%	94.8%
Average rating (scale 1-10)	8.24	8.49	8.53	8.63	8.59

### How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Repeat tourists	75.5%	70.2%	74.0%	69.4%	73.1%
In love (at least 10 previous visits)	13.0%	15.2%	13.8%	12.1%	12.3%

### Where does the flight come from?



Ten main origin markets	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Netherlands	24.2%	73.8%	78.9%	21.0%	76.1%
Germany	55.1%	16.7%	9.5%	49.1%	14.4%
Belgium	8.9%	6.4%	5.0%	17.7%	4.8%
Spanish Mainland	11.7%	2.8%	2.8%	10.9%	4.1%
Switzerland	0.0%	0.0%	0.0%	0.0%	0.2%
United Kingdom	0.0%	0.4%	3.8%	0.4%	0.1%
Ireland	0.0%	0.0%	0.0%	0.3%	0.0%
Austria	0.0%	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	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Climate/sun	94.2%	92.6%	94.8%	95.8%	96.1%
Beaches	42.7%	39.0%	39.6%	37.0%	43.2%
Tranquillity/rest/relaxation	34.5%	36.4%	36.5%	32.9%	34.2%
Scenery	25.0%	27.7%	19.0%	18.3%	23.1%
Visiting new places	8.8%	13.6%	13.9%	11.6%	15.1%
Security	3.8%	6.3%	7.2%	14.4%	12.4%
Price	18.1%	16.7%	16.3%	10.1%	10.6%
Suitable destination for children	12.2%	7.7%	6.4%	15.4%	10.4%
Quality of the environment	2.0%	5.2%	2.5%	5.9%	4.7%
Active tourism	3.6%	3.8%	4.0%	6.7%	4.5%
Culture	4.0%	3.9%	1.8%	3.1%	3.9%
Shopping	4.0%	4.1%	6.7%	2.9%	3.7%
Nightlife/fun	1.8%	2.2%	2.3%	1.2%	2.6%
Ease of travel	1.4%	2.0%	3.1%	3.3%	2.4%
Nautical activities	0.2%	3.6%	1.6%	1.1%	2.3%
Theme parks	2.8%	1.1%	1.8%	1.8%	0.9%

\* Multi-choice question

### What did motivate them to come?



Aspects motivating the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Previous visits to the Canary Islands	56.6%	59.1%	61.4%	58.6%	63.8%
Recommendation by friends or relatives	25.5%	25.1%	32.0%	30.1%	29.4%
The Canary Islands television channel	1.0%	0.0%	0.0%	0.3%	0.9%
Other television or radio channels	1.0%	0.3%	0.3%	0.1%	0.1%
Information in the press/magazines/books	6.4%	5.8%	2.4%	5.6%	2.8%
Attendance at a tourism fair	3.8%	0.3%	0.7%	1.9%	2.3%
Tour Operator's brochure or catalogue	9.1%	5.8%	5.6%	6.1%	6.8%
Recommendation by Travel Agency	15.1%	17.5%	10.0%	15.0%	12.7%
Information obtained via the Internet	35.0%	31.0%	33.7%	32.3%	33.4%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	7.6%	3.5%	4.5%	6.8%	1.8%

\* 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.