

Tourist profile trend (2017)

Netherlands: Third Quarter

How many are they and how much do they spend?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	106,389	102,452	114,586	150,406	149,052
Average daily expenditure (€)	119.65	115.74	122.55	122.36	129.89
. in their place of residence	77.92	80.64	87.53	85.40	95.69
. in the Canary Islands	41.73	35.10	35.02	36.97	34.20
Average length of stay	10.29	11.44	10.01	10.00	9.67
Turnover per tourist (€)	1,118	1,128	1,152	1,118	1,178
Total turnover (> 16 years old) (€m)	119	116	132	168	176
Share of total turnover	27.4%	26.7%	28.9%	30.1%	--
Share of total tourist	26.1%	25.5%	26.9%	27.8%	--

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

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation (**):	59.21	33.98	27.66	47.44	36.78
- Accommodation	49.04	28.23	22.43	34.20	29.51
- Additional accommodation expenses	10.17	5.75	5.23	13.24	7.27
Transport:	21.15	26.78	23.46	27.01	24.73
- Public transport	1.83	3.94	3.93	5.43	3.87
- Taxi	6.25	9.30	8.72	6.83	6.22
- Car rental	13.07	13.54	10.81	14.74	14.64
Food and drink:	114.57	148.93	155.63	163.25	145.81
- Food purchases at supermarkets	41.81	61.10	56.94	59.73	50.88
- Restaurants	72.75	87.83	98.70	103.52	94.94
Souvenirs:	170.22	66.74	50.80	43.83	51.35
Leisure:	42.65	55.01	52.84	45.30	52.93
- Organized excursions	23.54	31.58	27.92	24.62	26.07
- Leisure, amusement	6.64	4.37	7.59	5.82	7.13
- Trip to other islands	0.00	0.36	1.36	1.89	1.38
- Sporting activities	6.88	4.41	4.89	2.87	6.00
- Cultural activities	2.38	2.68	4.33	2.74	2.85
- Discos and disco-pubs	3.23	11.61	6.75	7.35	9.49
Others:	14.76	14.25	9.74	8.60	6.18
- Wellness	1.32	1.56	0.65	2.33	1.61
- Medical expenses	3.27	0.12	2.01	0.30	0.46
- Other expenses	10.17	12.57	7.09	5.97	4.11

How far in advance do they book their trip?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.0%	1.5%	0.4%	0.1%	0.7%
Between 2 and 7 days	14.2%	7.3%	4.4%	4.4%	8.0%
Between 8 and 15 days	11.8%	22.7%	19.1%	16.0%	17.0%
Between 16 and 30 days	21.8%	13.9%	12.5%	8.0%	11.2%
Between 31 and 90 days	19.8%	23.5%	21.7%	27.4%	20.7%
More than 90 days	32.4%	31.1%	42.1%	44.1%	42.3%

What do they book at their place of residence?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	6.9%	7.1%	2.3%	3.5%	1.9%
Flight and accommodation (room only)	27.6%	31.5%	31.6%	34.4%	31.1%
Flight and accommodation (B&B)	9.4%	9.8%	13.3%	11.5%	10.2%
Flight and accommodation (half board)	14.8%	19.0%	17.9%	18.9%	19.7%
Flight and accommodation (full board)	5.5%	1.9%	2.0%	0.6%	2.5%
Flight and accommodation (all inclusive)	35.8%	30.7%	32.9%	31.1%	34.7%
% Tourists using low-cost airlines	37.4%	28.0%	19.9%	31.9%	31.6%
Other expenses in their place of residence:					
- Car rental	8.4%	6.0%	6.0%	8.5%	12.3%
- Sporting activities	3.8%	3.3%	2.1%	1.0%	4.3%
- Excursions	4.1%	2.1%	4.2%	3.1%	5.9%
- Trip to other islands	0.0%	0.3%	0.7%	1.3%	0.5%

How do they book?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation booking					
Tour Operator	48.3%	62.9%	54.0%	40.5%	58.7%
- Tour Operator's website	70.5%	89.6%	86.0%	89.7%	93.1%
Accommodation	12.0%	6.5%	4.9%	8.7%	9.6%
- Accommodation's website	70.6%	85.8%	86.4%	85.2%	78.4%
Travel agency (High street)	20.5%	21.1%	27.7%	28.8%	22.0%
Online Travel Agency (OTA)	13.8%	5.2%	11.8%	18.9%	8.9%
No need to book accommodation	5.4%	4.3%	1.6%	3.2%	0.8%

Flight booking

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tour Operator	46.9%	60.3%	55.3%	42.1%	59.7%
- Tour Operator's website	71.0%	89.1%	82.6%	84.5%	91.0%
Airline	20.7%	13.2%	10.2%	18.2%	15.1%
- Airline's website	100.0%	89.0%	96.9%	94.3%	94.6%
Travel agency (High street)	23.4%	21.6%	23.4%	24.0%	22.0%
Online Travel Agency (OTA)	9.1%	4.9%	11.1%	15.6%	3.2%

Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	6.5%	4.8%	2.9%	11.8%	4.4%
4* Hotel	25.0%	32.0%	35.8%	34.7%	41.2%
1-2-3* Hotel	27.3%	19.8%	26.3%	13.2%	13.6%
Apartment	39.2%	37.9%	33.8%	37.4%	39.5%
Property (privately-owned, friends, family)	2.1%	4.8%	1.0%	2.0%	0.6%
Others	0.0%	0.6%	0.2%	0.9%	0.8%

Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Gender					
Percentage of men	48.2%	53.4%	51.1%	55.9%	46.7%
Percentage of women	51.8%	46.6%	48.9%	44.1%	53.3%

Age

Average age (tourists > 16 years old)	37.9	35.8	37.0	37.4	38.7
Standard deviation	12.4	13.3	14.6	15.3	14.5

Age range (> 16 years old)

16-24 years old	21.3%	28.4%	32.1%	31.2%	24.0%
25-30 years old	14.8%	18.7%	11.1%	13.8%	14.8%
31-45 years old	31.0%	24.0%	22.1%	22.5%	21.9%
46-60 years old	31.1%	25.5%	29.2%	22.8%	33.5%
Over 60 years old	1.7%	3.4%	5.6%	9.6%	5.7%

Occupation

Business owner or self-employed	9.9%	18.9%	11.0%	22.0%	14.1%
Upper/Middle management employee	51.2%	51.2%	50.1%	43.5%	54.2%
Auxiliary level employee	16.9%	11.3%	13.4%	9.8%	10.2%
Students	19.6%	14.8%	20.4%	18.2%	16.0%
Retired	0.3%	1.0%	2.8%	5.6%	4.5%
Unemployed / unpaid dom. work	2.0%	2.8%	2.3%	0.9%	1.0%

Annual household income level

€12,000 - €24,000	15.2%	20.8%	23.1%	26.4%	21.4%
€24,001 - €36,000	18.5%	23.7%	21.2%	18.9%	22.6%
€36,001 - €48,000	18.3%	15.3%	17.8%	8.6%	17.0%
€48,001 - €60,000	17.1%	16.9%	18.0%	7.3%	13.4%
€60,001 - €72,000	13.7%	7.2%	7.0%	17.2%	7.2%
€72,001 - €84,000	1.8%	4.5%	3.4%	6.4%	4.5%
More than €84,000	15.4%	11.7%	9.7%	15.3%	13.9%

(*) 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.

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Which island do they choose?



Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	16,389	13,759	16,440	20,812	21,499
- Fuerteventura	11,449	8,828	7,901	12,926	22,295
- Gran Canaria	42,722	42,384	50,618	63,136	56,882
- Tenerife	31,789	34,163	35,692	47,603	41,847
- La Palma	4,040	3,317	3,300	5,208	6,314

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	15.4%	13.4%	14.4%	13.9%	14.4%
- Fuerteventura	10.8%	8.6%	6.9%	8.6%	15.0%
- Gran Canaria	40.2%	41.4%	44.4%	42.2%	38.2%
- Tenerife	29.9%	33.3%	31.3%	31.8%	28.1%
- La Palma	3.8%	3.2%	2.9%	3.5%	4.2%

Who do they come with?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	8.5%	8.6%	2.2%	5.0%	3.5%
Only with partner	36.7%	49.8%	51.4%	50.9%	45.8%
Only with children (under the age of 13)	0.0%	3.1%	0.5%	2.3%	2.9%
Partner + children (under the age of 13)	11.9%	9.4%	11.8%	12.1%	13.5%
Other relatives	7.5%	2.9%	4.0%	2.7%	8.2%
Friends	7.8%	6.9%	5.8%	5.7%	8.0%
Work colleagues	0.0%	0.3%	0.2%	0.0%	0.0%
Other combinations ⁽¹⁾	27.6%	18.9%	24.1%	21.2%	18.1%

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

How do they rate the destination?



Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	94.4%	92.8%	95.2%	94.4%	93.8%
Average rating (scale 1-10)	8.53	8.36	8.53	8.48	8.58

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	64.3%	53.2%	56.7%	59.4%	60.8%
In love (at least 10 previous visits)	11.1%	7.6%	4.8%	8.9%	5.0%

Where does the flight come from?



Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Netherlands	43.2%	91.2%	81.3%	60.7%	86.4%
Germany	38.1%	4.3%	11.9%	24.0%	10.6%
Belgium	12.3%	1.7%	1.9%	6.7%	1.8%
Spanish Mainland	6.4%	2.6%	4.3%	7.4%	0.8%
United Kingdom	0.0%	0.0%	0.4%	0.0%	0.4%
France	0.0%	0.0%	0.2%	0.0%	0.0%
Ireland	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%
Switzerland	0.0%	0.0%	0.0%	0.0%	0.0%
Poland	0.0%	0.0%	0.0%	0.0%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	90.2%	93.7%	96.9%	91.7%	96.3%
Beaches	47.6%	49.8%	47.6%	47.2%	47.3%
Tranquillity/rest/relaxation	36.3%	31.8%	32.8%	29.4%	41.7%
Scenery	9.9%	19.6%	21.9%	16.0%	19.1%
Visiting new places	9.0%	12.8%	17.4%	17.5%	15.9%
Price	16.6%	15.1%	13.2%	13.6%	14.0%
Security	3.4%	3.1%	6.8%	13.7%	7.6%
Culture	4.5%	3.2%	4.1%	5.1%	5.9%
Suitable destination for children	2.9%	8.3%	7.4%	7.9%	5.8%
Shopping	2.7%	8.0%	7.8%	5.4%	4.9%
Nightlife/fun	7.2%	6.6%	4.9%	7.2%	3.7%
Active tourism	6.8%	6.6%	4.8%	4.9%	3.7%
Nautical activities	4.5%	4.6%	3.1%	1.9%	3.7%
Quality of the environment	3.7%	2.2%	5.0%	2.1%	3.5%
Theme parks	1.0%	4.2%	3.0%	1.5%	2.9%
Security against natural catastrophes	0.0%	0.7%	0.0%	0.0%	1.4%

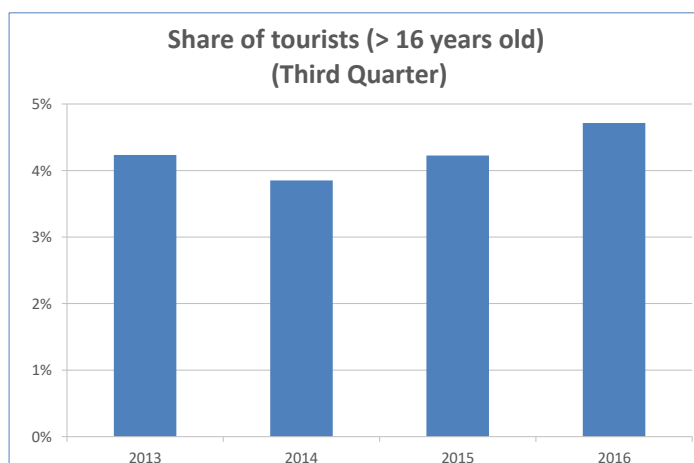
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	54.5%	44.6%	44.3%	41.9%	49.4%
Recommendation by friends or relatives	26.9%	29.8%	29.5%	35.0%	29.4%
The Canary Islands television channel	0.0%	1.4%	0.8%	0.0%	0.8%
Other television or radio channels	0.0%	1.5%	0.3%	0.5%	2.3%
Information in the press/magazines/books	5.7%	5.0%	2.1%	5.1%	4.0%
Attendance at a tourism fair	1.4%	0.7%	1.1%	0.8%	1.1%
Tour Operator's brochure or catalogue	6.8%	8.6%	13.2%	6.2%	6.0%
Recommendation by Travel Agency	20.6%	12.0%	16.5%	11.1%	16.2%
Information obtained via the Internet	42.8%	40.8%	42.3%	41.9%	41.9%
Senior Tourism programme	0.0%	0.3%	0.2%	0.0%	0.3%
Others	9.1%	5.3%	2.9%	3.3%	3.6%

* 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.