

# Tourist profile trend (2017)

## NETHERLANDS

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



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR)	474,811	474,749	502,253	619,675	648,508
Tourist arrivals (> 16 years old)	407,559	402,089	425,859	540,656	569,002
Average daily expenditure (€)	122.15	117.92	121.50	121.05	129.35
. in their place of residence	83.61	82.90	86.17	86.53	94.91
. in the Canary Islands	38.54	35.02	35.33	34.52	34.44
Average length of stay	9.46	10.38	9.56	9.01	9.14
Turnover per tourist (€)	1,065	1,075	1,074	1,032	1,099
Total turnover (€m)	506	511	540	640	712
Tourist arrivals: year on year change	--	0.0%	5.8%	23.4%	4.7%
Turnover: year on year change	--	1.0%	5.7%	18.5%	11.4%
<u>% tourists who pay in the Canary Islands:</u>					
<b>Accommodation:</b>					
- Accommodation	18.7%	11.9%	13.3%	14.3%	13.2%
- Additional accommodation expenses	11.0%	8.6%	8.4%	7.1%	7.8%
<b>Transport:</b>					
- Public transport	19.8%	14.6%	15.2%	14.6%	15.7%
- Taxi	20.7%	24.1%	23.1%	24.1%	21.6%
- Car rental	24.2%	21.6%	22.4%	21.2%	22.3%
<b>Food and drink:</b>					
- Food purchases at supermarkets	61.4%	64.0%	62.6%	62.5%	61.1%
- Restaurants	60.0%	60.1%	60.8%	56.8%	61.3%
<b>Souvenirs:</b>	60.7%	60.0%	55.3%	55.0%	58.9%
<b>Leisure:</b>					
- Organized excursions	20.3%	22.6%	24.1%	21.6%	20.8%
- Leisure, amusement	8.0%	7.3%	7.6%	7.4%	9.3%
- Trip to other islands	0.5%	1.2%	1.4%	2.1%	1.8%
- Sporting activities	6.9%	5.9%	6.1%	5.5%	6.6%
- Cultural activities	4.3%	7.2%	6.0%	6.6%	7.0%
- Discos and disco-pubs	5.0%	6.2%	5.1%	4.9%	5.5%
<b>Others:</b>					
- Wellness	5.0%	4.5%	3.0%	5.5%	4.4%
- Medical expenses	4.6%	3.7%	4.0%	2.9%	3.7%
- Other expenses	10.6%	11.3%	10.5%	10.5%	9.2%

2017



+5%  
TOURISTS  
648,508



+6%  
TRAVEL EXPENSES  
€1,099



+11%  
TURNOVER  
€712 MILL

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



	2013	2014	2015	2016	2017
Flight only	7.2%	6.3%	4.1%	4.4%	3.5%
Flight and accommodation (room only)	33.2%	33.5%	33.3%	31.1%	33.9%
Flight and accommodation (B&B)	9.7%	10.6%	10.4%	10.6%	9.3%
Flight and accommodation (half board)	21.1%	18.9%	19.4%	20.1%	19.1%
Flight and accommodation (full board)	2.1%	2.2%	2.1%	2.1%	1.9%
Flight and accommodation (all inclusive)	26.7%	28.5%	30.6%	31.7%	32.4%
<u>% Tourists using low-cost airlines</u>	38.0%	30.5%	29.1%	39.8%	33.3%
<u>Other expenses in their place of residence:</u>					
- Car rental	14.8%	10.7%	11.3%	11.8%	13.4%
- Sporting activities	4.2%	3.3%	3.0%	3.3%	4.2%
- Excursions	3.9%	2.3%	3.1%	3.3%	3.9%
- Trip to other islands	1.6%	0.3%	0.9%	0.8%	0.2%

### How do they book?



	2013	2014	2015	2016	2017
<u>Accommodation booking</u>					
<b>Tour Operator</b>	46.9%	55.1%	53.5%	42.9%	49.3%
- Tour Operator's website	81.4%	84.6%	86.5%	77.8%	86.7%
<b>Accommodation</b>	13.7%	8.6%	7.7%	11.1%	10.0%
- Accommodation's website	71.5%	86.5%	91.5%	85.5%	82.8%
<b>Travel agency (High street)</b>	24.2%	23.3%	22.1%	26.1%	24.2%
<b>Online Travel Agency (OTA)</b>	12.7%	9.8%	14.8%	17.6%	14.9%
<b>No need to book accommodation</b>	2.5%	3.2%	1.9%	2.3%	1.6%
<u>Flight booking</u>					
<b>Tour Operator</b>	50.4%	55.3%	54.2%	45.9%	51.3%
- Tour Operator's website	75.1%	80.9%	82.0%	72.4%	85.1%
<b>Airline</b>	20.6%	16.6%	14.0%	18.2%	16.9%
- Airline's website	98.9%	94.6%	97.2%	97.0%	95.2%
<b>Travel agency (High street)</b>	21.4%	20.6%	19.7%	21.6%	22.7%
<b>Online Travel Agency (OTA)</b>	7.6%	7.5%	12.1%	14.3%	9.1%

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



	2013	2014	2015	2016	2017
The same day they leave	0.9%	0.7%	0.4%	0.6%	0.3%
Between 2 and 7 days	11.6%	8.3%	7.5%	6.7%	7.6%
Between 8 and 15 days	13.2%	15.7%	16.4%	9.8%	13.0%
Between 16 and 30 days	15.3%	15.3%	13.8%	12.5%	13.3%
Between 31 and 90 days	31.1%	30.8%	32.6%	37.0%	31.6%
More than 90 days	27.9%	29.2%	29.3%	33.3%	34.2%

### Who are they?



	2013	2014	2015	2016	2017
<u>Gender</u>					
Men	59.0%	51.1%	50.7%	51.5%	46.5%
Women	41.0%	48.9%	49.3%	48.5%	53.5%
<u>Age</u>					
Average age (tourists > 16 years old)	44.3	44.9	46.1	44.6	47.2
Standard deviation	14.2	15.0	15.6	15.9	15.8
<u>Age range (&gt; 16 years old)</u>					
16-24 years old	10.2%	12.0%	13.0%	13.4%	11.0%
25-30 years old	9.7%	11.2%	8.5%	11.1%	9.1%
31-45 years old	33.8%	25.7%	23.4%	27.8%	22.6%
46-60 years old	31.4%	35.1%	35.1%	29.2%	34.6%
Over 60 years old	15.0%	16.0%	20.0%	18.6%	22.7%
<u>Occupation</u>					
Business owner or self-employed	25.7%	21.0%	18.9%	23.0%	18.4%
Upper/Middle management employee	39.1%	49.4%	46.5%	41.9%	47.0%
Auxiliary level employee	12.7%	8.9%	10.3%	8.8%	9.1%
Students	8.9%	6.1%	8.1%	10.9%	6.6%
Retired	10.5%	11.9%	13.7%	13.2%	17.0%
Unemployed / unpaid dom. work	3.1%	2.7%	2.6%	2.2%	2.0%
<u>Annual household income level</u>					
€12,000 - €24,000	11.7%	12.6%	13.6%	14.4%	14.6%
€24,001 - €36,000	17.8%	19.0%	19.0%	17.3%	17.7%
€36,001 - €48,000	16.5%	17.6%	20.3%	15.7%	16.4%
€48,001 - €60,000	16.9%	16.5%	18.9%	15.1%	17.8%
€60,001 - €72,000	9.1%	10.7%	8.7%	12.3%	10.4%
€72,001 - €84,000	5.1%	6.3%	6.0%	7.3%	5.8%
More than €84,000	23.0%	17.2%	13.5%	17.9%	17.3%

# Tourist profile trend (2017)

## NETHERLANDS

### Which island do they choose?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	58,642	60,122	66,270	85,543	95,367
- Fuerteventura	45,996	36,203	40,614	54,698	72,203
- Gran Canaria	163,600	158,587	170,860	209,880	207,963
- Tenerife	125,295	133,439	131,287	167,653	166,631
- La Palma	13,879	12,615	14,013	20,718	24,346

### Where do they stay?

	2013	2014	2015	2016	2017
5* Hotel	8.6%	4.7%	4.6%	6.3%	5.4%
4* Hotel	34.6%	33.6%	32.6%	35.8%	37.8%
1-2-3* Hotel	17.9%	17.8%	20.7%	16.7%	13.8%
Apartment	36.9%	40.3%	40.1%	38.8%	40.6%
Property (privately-owned, friends, family)	1.1%	2.7%	1.2%	1.6%	1.1%
Others	0.9%	1.0%	0.8%	0.9%	1.3%

### Who do they come with?

	2013	2014	2015	2016	2017
Unaccompanied	10.1%	8.7%	5.7%	6.1%	5.1%
Only with partner	47.4%	50.9%	55.8%	47.1%	50.2%
Only with children (under the age of 13)	1.3%	1.7%	1.0%	1.3%	2.2%
Partner + children (under the age of 13)	11.3%	11.3%	10.4%	14.1%	12.3%
Other relatives	5.0%	3.9%	5.4%	5.2%	5.9%
Friends	5.0%	5.0%	5.5%	5.9%	5.5%
Work colleagues	0.1%	0.2%	0.1%	0.2%	0.0%
Other combinations <sup>(1)</sup>	19.7%	18.3%	16.1%	20.2%	18.9%

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

### How do they rate the Canary Islands?

Impression of their stay	2013	2014	2015	2016	2017
Good or very good (% tourists)	88.9%	94.9%	94.3%	94.0%	94.3%
Average rating (scale 1-10)	8.33	8.48	8.46	8.53	8.59

### How many are loyal to the Canary Islands?

Repeat tourists	2013	2014	2015	2016	2017
At least 1 previous visit	74.3%	70.1%	72.3%	70.8%	73.5%
At least 10 previous visits	15.3%	15.8%	12.7%	12.2%	12.2%

### Where does the flight come from?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
Netherlands	36.3%	81.1%	79.6%	48.5%	79.3%
Germany	44.4%	10.3%	11.4%	30.8%	15.2%
Spanish Mainland	9.4%	3.3%	4.2%	8.1%	2.6%
Belgium	9.7%	4.7%	3.8%	10.9%	2.4%
United Kingdom	0.0%	0.3%	0.9%	0.1%	0.2%
Finland	0.0%	0.0%	0.0%	0.0%	0.1%
Austria	0.0%	0.0%	0.0%	0.0%	0.1%
Switzerland	0.0%	0.0%	0.0%	0.6%	0.1%
Denmark	0.0%	0.0%	0.0%	0.1%	0.0%
Others	0.0%	0.3%	0.1%	0.9%	0.1%

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	14.4%	15.0%	15.7%	15.9%	16.8%
- Fuerteventura	11.3%	9.0%	9.6%	10.2%	12.7%
- Gran Canaria	40.2%	39.6%	40.4%	39.0%	36.7%
- Tenerife	30.8%	33.3%	31.0%	31.1%	29.4%
- La Palma	3.4%	3.1%	3.3%	3.8%	4.3%

### Why do they choose the Canary Islands?

Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	94.5%	94.6%	95.9%	94.5%	96.1%
Tranquillity/rest/relaxation	35.2%	35.6%	35.2%	35.1%	39.6%
Beaches	41.0%	40.9%	41.0%	38.2%	39.5%
Scenery	18.1%	25.5%	24.9%	18.9%	23.3%
Visiting new places	8.8%	10.7%	12.9%	12.9%	12.8%
Price	15.1%	13.6%	13.9%	13.1%	11.4%
Security	4.1%	4.8%	7.7%	11.8%	9.1%
Suitable destination for children	6.8%	7.0%	5.1%	7.0%	6.6%
Shopping	3.1%	5.7%	6.5%	4.0%	5.2%
Active tourism	4.5%	4.7%	4.2%	5.3%	5.2%
Quality of the environment	5.6%	3.8%	4.4%	4.7%	3.6%
Nightlife/fun	6.1%	4.0%	3.1%	4.0%	3.5%
Culture	2.6%	3.1%	2.7%	3.8%	3.4%
Ease of travel	3.3%	2.1%	1.7%	4.2%	2.7%
Nautical activities	2.0%	2.9%	1.8%	2.3%	2.7%
Theme parks	1.3%	1.9%	1.6%	1.5%	1.8%

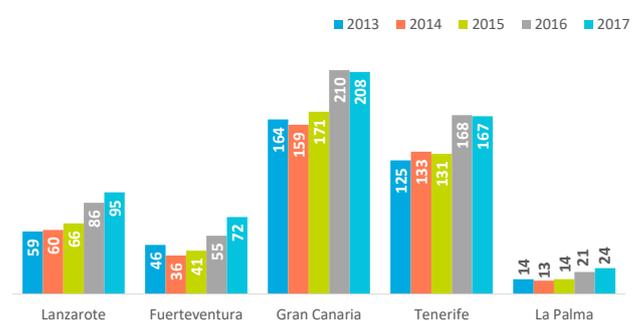
\* Multi-choise question

### What did motivate them to come?

Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	63.8%	60.5%	60.9%	57.5%	62.2%
Recommendation by friends/relatives	28.2%	26.9%	27.2%	28.0%	28.3%
The Canary Islands television channel	0.2%	0.4%	0.3%	0.1%	0.7%
Other television or radio channels	0.2%	0.7%	0.3%	0.6%	0.7%
Information in press/magazines/books	3.5%	4.7%	3.2%	4.9%	3.0%
Attendance at a tourism fair	2.0%	0.7%	0.9%	1.4%	1.1%
Tour Operator's brochure or catalogue	5.4%	6.5%	7.5%	6.5%	5.9%
Recommendation by Travel Agency	14.0%	11.3%	11.6%	12.8%	12.3%
Information obtained via the Internet	29.8%	31.3%	32.1%	34.1%	32.6%
Senior Tourism programme	0.0%	0.1%	0.1%	0.0%	0.1%
Others	7.5%	4.6%	4.6%	4.8%	3.9%

\* Multi-choise question

### Tourist arrivals by islands (thousands)



Tourists over 16 years old.

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.