

Tourist profile trend (2017)

NETHERLANDS: Fourth Quarter

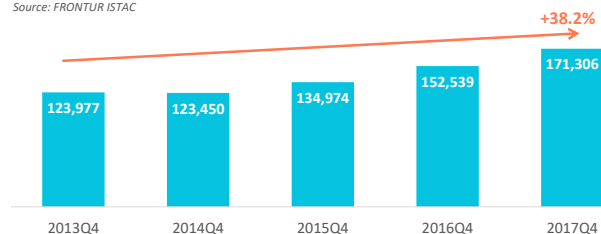
How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	123,977	123,450	134,974	152,539	171,306
Tourist arrivals (> 16 years old)	107,740	104,058	116,537	133,898	150,544
Average daily expenditure (€)	125.67	129.87	125.33	132.30	134.05
. in their place of residence	85.54	91.76	88.13	94.69	97.34
. in the Canary Islands	40.13	38.11	37.20	37.61	36.71
Average length of stay	9.24	9.21	8.78	8.35	9.19
Turnover per tourist (€)	1,048	1,064	1,011	1,073	1,125
Total turnover (€m)	130	131	136	164	193
Share of annual tourist	26.1%	26.0%	26.9%	24.6%	26.4%
Share of annual turnover	25.7%	25.7%	25.3%	25.6%	27.0%
% tourists who pay in the Canary Islands:					
Accommodation:					
- Accommodation	23.8%	11.6%	13.5%	13.4%	14.5%
- Additional accommodation expenses	10.0%	9.5%	5.7%	7.6%	7.7%
Transport:					
- Public transport	21.3%	14.4%	13.0%	16.3%	12.9%
- Taxi	16.8%	22.0%	20.4%	23.6%	19.6%
- Car rental	23.0%	23.9%	24.6%	19.1%	24.6%
Food and drink:					
- Food purchases at supermarkets	64.2%	65.3%	62.8%	55.2%	59.2%
- Restaurants	48.0%	67.5%	58.7%	63.7%	61.0%
Souvenirs:					
	61.5%	55.6%	51.1%	59.0%	60.7%
Leisure:					
- Organized excursions	25.3%	17.1%	23.1%	19.0%	17.7%
- Leisure, amusement	4.7%	7.9%	7.9%	7.6%	7.3%
- Trip to other islands	0.0%	1.3%	0.8%	0.5%	0.4%
- Sporting activities	4.2%	3.9%	5.9%	6.3%	6.0%
- Cultural activities	2.3%	7.3%	6.9%	5.7%	5.8%
- Discos and disco-pubs	6.5%	4.1%	3.1%	4.2%	5.0%
Others:					
- Wellness	2.3%	5.7%	3.8%	7.4%	3.8%
- Medical expenses	4.1%	6.0%	2.9%	4.2%	5.1%
- Other expenses	7.5%	9.3%	10.5%	9.2%	7.8%

TOURIST ARRIVALS

Source: FRONTUR ISTAC



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	4.2%	5.2%	4.4%	4.7%	5.5%
Flight and accommodation (room only)	35.7%	34.3%	35.3%	31.7%	36.4%
Flight and accommodation (B&B)	8.1%	14.9%	8.2%	8.6%	6.5%
Flight and accommodation (half board)	25.1%	16.6%	19.1%	22.4%	18.0%
Flight and accommodation (full board)	0.7%	2.0%	2.4%	3.6%	2.3%
Flight and accommodation (all inclusive)	26.3%	27.0%	30.7%	29.1%	31.3%
% Tourists using low-cost airlines	37.3%	28.3%	36.7%	35.2%	33.2%
Other expenses in their place of residence:					
- Car rental	16.9%	11.8%	15.6%	11.9%	14.0%
- Sporting activities	1.6%	4.3%	3.7%	2.0%	4.4%
- Excursions	6.2%	2.1%	4.5%	2.2%	2.1%
- Trip to other islands	0.0%	0.0%	1.5%	1.1%	0.0%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	41.6%	54.8%	55.5%	48.4%	44.3%
- Tour Operator's website	89.3%	86.4%	87.4%	77.0%	81.6%
Accommodation	10.7%	8.8%	8.6%	9.7%	10.8%
- Accommodation's website	80.8%	85.0%	88.9%	94.9%	89.9%
Travel agency (High street)	28.0%	23.0%	16.7%	26.7%	27.1%
Online Travel Agency (OTA)	18.1%	11.1%	16.7%	13.5%	15.4%
No need to book accommodation	1.6%	2.3%	2.5%	1.8%	2.4%
Flight booking					
Tour Operator	48.2%	56.8%	53.7%	53.2%	47.8%
- Tour Operator's website	73.3%	81.2%	86.1%	75.2%	77.8%
Airline	16.7%	15.9%	15.4%	17.1%	18.3%
- Airline's website	100.0%	96.1%	98.2%	97.3%	93.1%
Travel agency (High street)	22.7%	18.4%	17.9%	21.8%	23.2%
Online Travel Agency (OTA)	12.4%	8.9%	13.0%	7.9%	10.7%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	2.3%	0.5%	0.9%	1.4%	0.0%
Between 2 and 7 days	13.7%	11.6%	8.3%	4.7%	6.0%
Between 8 and 15 days	18.2%	13.9%	14.2%	3.1%	14.8%
Between 16 and 30 days	12.6%	14.4%	16.6%	16.1%	17.1%
Between 31 and 90 days	30.8%	36.9%	39.6%	46.3%	34.3%
More than 90 days	22.5%	22.8%	20.5%	28.3%	27.8%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	64.5%	48.8%	51.2%	47.9%	44.3%
Women	35.5%	51.2%	48.8%	52.1%	55.7%
Age					
Average age (tourists > 16 years old)	43.6	46.4	47.4	45.5	51.6
Standard deviation	13.3	13.9	14.0	15.2	16.1
Age range (> 16 years old)					
16-24 years old	9.7%	8.0%	6.0%	10.3%	7.9%
25-30 years old	8.2%	9.8%	9.8%	9.9%	7.9%
31-45 years old	38.1%	26.8%	25.3%	28.9%	17.2%
46-60 years old	33.7%	39.5%	40.8%	35.3%	32.4%
Over 60 years old	10.3%	15.9%	18.0%	15.7%	34.6%
Occupation					
Business owner or self-employed	26.6%	22.1%	23.9%	20.8%	17.6%
Upper/Middle management employee	39.1%	50.0%	45.6%	44.0%	41.9%
Auxiliary level employee	12.8%	10.0%	10.2%	8.1%	8.7%
Students	7.6%	3.5%	4.4%	10.3%	3.6%
Retired	9.1%	11.7%	14.2%	13.7%	25.6%
Unemployed / unpaid dom. work	4.8%	2.7%	1.7%	3.0%	2.6%
Annual household income level					
€12,000 - €24,000	12.8%	9.0%	12.9%	12.7%	15.5%
€24,001 - €36,000	20.1%	15.3%	17.6%	18.0%	18.4%
€36,001 - €48,000	22.3%	17.4%	17.5%	19.5%	18.3%
€48,001 - €60,000	10.9%	18.6%	19.5%	18.4%	17.4%
€60,001 - €72,000	11.4%	9.3%	9.8%	10.1%	12.6%
€72,001 - €84,000	5.0%	7.3%	7.8%	7.2%	4.3%
More than €84,000	17.5%	23.1%	14.8%	14.1%	13.4%

Tourist profile trend (2017)

NETHERLANDS: Fourth Quarter

Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	14,978	16,379	20,098	22,574	28,726
- Fuerteventura	10,424	10,338	11,418	13,224	17,203
- Gran Canaria	44,673	40,222	45,656	53,569	53,735
- Tenerife	34,438	33,254	34,560	39,008	43,461
- La Palma	3,227	3,595	3,792	5,523	6,772

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	13.9%	15.8%	17.4%	16.9%	19.2%
- Fuerteventura	9.7%	10.0%	9.9%	9.9%	11.5%
- Gran Canaria	41.5%	38.8%	39.5%	40.0%	35.8%
- Tenerife	32.0%	32.0%	29.9%	29.1%	29.0%
- La Palma	3.0%	3.5%	3.3%	4.1%	4.5%

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	10.3%	4.4%	5.3%	5.5%	5.9%
4* Hotel	35.8%	35.0%	29.0%	34.8%	35.2%
1-2-3* Hotel	17.4%	18.5%	20.1%	17.8%	14.2%
Apartment	33.9%	39.4%	43.6%	39.1%	41.0%
Property (privately-owned, friends, family)	0.6%	1.3%	1.2%	1.5%	2.0%
Others	2.0%	1.4%	0.7%	1.3%	1.7%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	94.0%	94.3%	96.8%	96.9%	96.0%
Tranquillity/rest/relaxation	36.0%	39.2%	36.0%	40.4%	42.6%
Beaches	40.9%	35.0%	44.6%	37.5%	35.1%
Scenery	17.6%	26.0%	28.9%	18.0%	24.0%
Visiting new places	7.5%	11.9%	11.7%	10.9%	10.2%
Price	9.3%	12.1%	13.1%	16.4%	9.5%
Shopping	1.3%	5.4%	4.8%	5.5%	8.0%
Security	6.1%	5.1%	11.0%	9.9%	6.2%
Active tourism	5.8%	3.9%	4.1%	4.5%	5.7%
Nightlife/fun	6.4%	4.2%	1.7%	5.3%	4.1%
Suitable destination for children	7.8%	8.2%	4.2%	3.6%	3.2%
Ease of travel	4.6%	1.4%	1.1%	4.0%	3.1%
Nautical activities	2.4%	1.8%	1.2%	2.8%	3.0%
Quality of the environment	9.5%	3.9%	4.8%	5.6%	3.0%
Theme parks	1.7%	1.8%	1.2%	2.2%	1.5%
Golf	0.6%	0.0%	0.8%	0.0%	1.2%

* Multi-choice question

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	18.1%	7.4%	4.9%	7.1%	6.2%
Only with partner	41.9%	53.6%	57.8%	47.8%	58.5%
Only with children (under the age of 13)	3.5%	1.1%	0.8%	0.3%	0.7%
Partner + children (under the age of 13)	12.2%	14.4%	10.1%	12.8%	7.5%
Other relatives	2.8%	4.6%	6.5%	7.2%	5.3%
Friends	3.3%	3.2%	4.6%	6.1%	4.7%
Work colleagues	0.0%	0.5%	0.0%	0.0%	0.0%
Other combinations ⁽¹⁾	18.2%	15.3%	15.2%	18.7%	17.1%

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

How do they rate the Canary Islands?

Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	92.8%	96.2%	92.4%	94.5%	95.9%
Average rating (scale 1-10)	8.50	8.57	8.42	8.56	8.65

How many are loyal to the Canary Islands?

Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	70.8%	73.7%	76.4%	76.2%	78.2%
At least 10 previous visits	14.4%	18.5%	12.2%	15.3%	16.0%

Where does the flight come from?

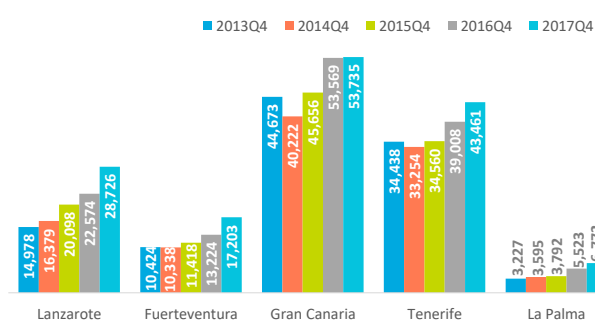
Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Netherlands	36.5%	75.8%	76.7%	66.7%	87.9%
Germany	39.2%	11.4%	15.0%	16.8%	8.5%
Spanish Mainland	6.5%	4.9%	4.6%	4.3%	2.7%
Belgium	17.7%	7.6%	3.4%	11.0%	0.3%
Finland	0.0%	0.0%	0.0%	0.0%	0.3%
Austria	0.0%	0.0%	0.0%	0.0%	0.1%
Denmark	0.0%	0.0%	0.0%	0.4%	0.0%
Italy	0.0%	0.0%	0.0%	0.8%	0.0%
Poland	0.0%	0.0%	0.2%	0.0%	0.0%
Others	0.1%	0.4%	0.2%	0.0%	0.2%

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	63.2%	62.6%	64.4%	66.0%	66.5%
Recommendation by friends/relatives	34.9%	27.0%	24.5%	23.1%	27.8%
The Canary Islands television channel	0.0%	0.2%	0.0%	0.0%	0.3%
Other television or radio channels	0.0%	0.3%	0.3%	0.1%	0.2%
Information in press/magazines/books	1.2%	4.2%	4.8%	2.0%	1.6%
Attendance at a tourism fair	1.9%	1.2%	0.5%	1.6%	0.7%
Tour Operator's brochure or catalogue	3.7%	5.6%	5.8%	6.2%	5.6%
Recommendation by Travel Agency	12.1%	10.5%	9.5%	11.9%	10.7%
Information obtained via the Internet	23.2%	30.7%	34.3%	30.7%	26.6%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	10.2%	5.6%	5.3%	4.3%	4.9%

* Multi-choice question

Tourist arrivals by islands



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.