

TOURIST PROFILE BY ISLAND OF STAY (2022)

BELGIUM



How many are they and how much do they spend?



	LZ	FUE	GC	TFE	LP
TOURISTS					
Tourist arrivals (FRONTUR)	50,061	17,543	105,410	229,912	3,699
Tourist arrivals > 15 years old (EGT)	44,708	17,076	94,584	210,037	3,367
- book holiday package	21,722	7,625	49,217	86,004	2,362
- do not book holiday package	22,986	9,451	45,367	124,033	1,005
- % tourists who book holiday package	48.6%	44.7%	52.0%	40.9%	70.2%



	LZ	FUE	GC	TFE	LP
Expenditure per tourist (€)	1,579	1,217	1,543	1,449	1,487
- book holiday package	1,696	1,334	1,719	1,764	1,623
- holiday package	1,505	1,193	1,466	1,477	1,320
- others	190	141	253	287	303
- do not book holiday package	1,468	1,122	1,351	1,230	1,167
- flight	296	341	431	355	343
- accommodation	638	419	461	366	486
- others	534	362	459	509	339
Average length of stay	9.95	9.25	9.11	10.06	9.20
- book holiday package	8.91	7.79	7.94	8.16	9.29
- do not book holiday package	10.94	10.43	10.37	11.38	8.99
Average daily expenditure (€)	166.7	148.1	188.4	170.9	172.4
- book holiday package	199.8	185.6	222.3	224.8	186.6
- do not book holiday package	135.5	117.8	151.6	133.5	139.1
Total turnover (> 15 years old) (€m)	71	21	146	304	5
- book holiday package	37	10	85	152	4
- do not book holiday package	34	11	61	153	1

Where did they spend their main holiday last year?*

	LZ	FUE	GC	TFE	LP
Didn't have holidays	14.4%	11.2%	26.4%	19.3%	17.7%
Canary Islands	20.4%	24.1%	22.8%	26.6%	10.3%
Other destination	65.2%	64.7%	50.9%	54.2%	72.0%

What other destinations did they consider for this trip?*

	LZ	FUE	GC	TFE	LP
None (I was clear about "this Canary Island")	22.5%	27.5%	24.3%	31.0%	20.0%
Canary Islands (other island)	23.5%	31.6%	24.6%	22.9%	24.5%
Other destination	53.9%	40.9%	51.1%	46.1%	55.5%

*Percentage of valid answers

Source: Encuesta sobre el Gasto Turístico (ISTAC).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

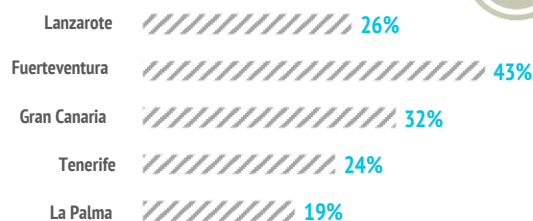
Importance of each factor in the destination choice



	LZ	FUE	GC	TFE	LP
Climate	73.5%	81.3%	73.6%	74.8%	67.7%
Tranquility	39.7%	43.5%	50.2%	50.1%	39.2%
Sea	39.9%	49.4%	41.1%	39.3%	32.5%
Landscapes	43.1%	33.4%	37.0%	40.7%	60.2%
Safety	32.0%	35.7%	39.5%	40.4%	19.8%
European belonging	27.9%	43.6%	36.7%	39.5%	37.4%
Accommodation supply	27.6%	28.9%	39.1%	32.6%	28.5%
Price	21.0%	36.6%	31.1%	28.7%	21.1%
Beaches	26.3%	42.9%	31.8%	24.3%	19.3%
Environment	34.8%	22.4%	24.8%	26.8%	35.0%
Gastronomy	25.0%	18.1%	29.2%	23.8%	9.2%
Fun possibilities	21.8%	19.9%	24.8%	23.0%	11.5%
Authenticity	25.7%	24.9%	27.7%	19.6%	32.4%
Effortless trip	17.5%	22.3%	18.1%	19.3%	18.4%
Exoticism	14.7%	16.2%	20.6%	16.3%	13.3%
Hiking trail network	12.9%	11.5%	16.7%	15.7%	50.3%
Shopping	9.5%	7.8%	11.4%	8.4%	1.1%
Historical heritage	11.0%	3.4%	9.7%	8.3%	8.9%
Culture	10.8%	4.4%	9.0%	5.7%	6.5%
Nightlife	5.0%	0.0%	8.9%	3.0%	0.0%

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important") by tourists who indicate that the factor is "very important" in their choice.

% TOURISTS WHO CHOOSE BEACHES



What is the main motivation for their holidays?

	LZ	FUE	GC	TFE	LP
Rest	40.0%	38.0%	51.4%	47.9%	29.8%
Enjoy family time	10.7%	25.1%	12.3%	14.4%	17.3%
Have fun	5.2%	10.3%	12.6%	9.4%	2.9%
Explore the destination	38.2%	20.6%	20.9%	23.9%	48.6%
Practice their hobbies	4.7%	5.0%	1.2%	2.1%	-
Other reasons	1.2%	1.1%	1.5%	2.3%	1.4%

How far in advance do they book their trip?

	LZ	FUE	GC	TFE	LP
The same day	1.1%	4.5%	0.5%	1.0%	-
Between 1 and 30 days	32.6%	41.2%	39.5%	31.2%	45.8%
Between 1 and 2 months	23.4%	26.5%	24.8%	22.4%	16.0%
Between 3 and 6 months	29.5%	15.6%	22.7%	30.2%	25.6%
More than 6 months	13.5%	12.2%	12.6%	15.1%	12.6%

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What channels did they use to get information about the trip?

	LZ	FUE	GC	TFE	LP
Previous visits to the Canary Islands	46.8%	50.6%	44.4%	54.4%	34.3%
Friends or relatives	26.1%	34.0%	27.7%	37.4%	10.7%
Internet or social media	65.1%	40.6%	44.4%	45.0%	64.7%
Mass Media	2.1%	2.5%	2.6%	1.7%	5.7%
Travel guides and magazines	16.3%	11.1%	10.5%	10.2%	19.9%
Travel Blogs or Forums	8.6%	4.0%	4.4%	5.1%	9.9%
Travel TV Channels	0.8%	0.0%	0.4%	0.0%	0.0%
Tour Operator or Travel Agency	27.9%	24.0%	30.2%	28.4%	27.7%
Public administrations or similar	0.0%	1.9%	0.0%	0.5%	0.9%
Others	2.2%	0.0%	2.9%	1.9%	0.0%

* Multi-choise question

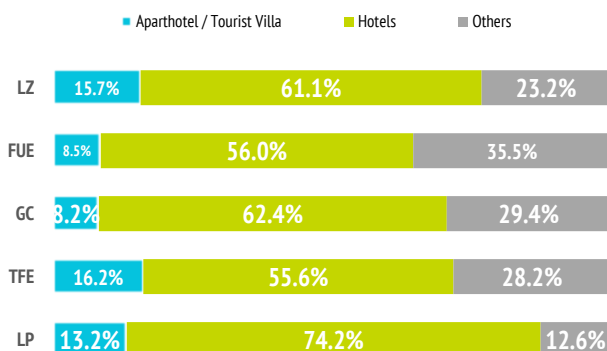
With whom did they book their flight and accomodation?

	LZ	FUE	GC	TFE	LP
Flight					
- Directly with the airline	47.4%	54.0%	46.1%	53.6%	36.8%
- Tour Operator or Travel Agency	52.6%	46.0%	53.9%	46.4%	63.2%
Accommodation					
- Directly with the accommodation	42.4%	37.4%	35.1%	38.9%	30.4%
- Tour Operator or Travel Agency	57.6%	62.6%	64.9%	61.1%	69.6%

Where do they stay?

	LZ	FUE	GC	TFE	LP
1-2-3* Hotel	6.4%	6.7%	12.3%	4.0%	-
4* Hotel	37.9%	47.6%	33.7%	38.6%	74.2%
5* Hotel / 5* Luxury Hotel	16.9%	1.8%	16.3%	12.9%	-
Aparthotel / Tourist Villa	15.7%	8.5%	8.2%	16.2%	13.2%
House/room rented in a private dwelling	3.8%	2.9%	7.3%	8.4%	6.2%
Private accommodation (1)	6.1%	17.6%	6.7%	10.1%	1.9%
Others (Cottage, cruise, camping,...)	13.2%	15.0%	15.4%	9.8%	4.5%

(1) Own property /House of friends or relatives / Free housing exchange / Other private accommodation.



What do they book?

	LZ	FUE	GC	TFE	LP
Room only	22.7%	14.5%	21.8%	27.7%	16.4%
Bed and Breakfast	7.1%	3.3%	9.7%	6.8%	13.7%
Half board	23.2%	25.4%	27.3%	32.4%	37.3%
Full board	3.1%	9.6%	3.9%	3.7%	6.3%
All inclusive	43.8%	47.3%	37.4%	29.3%	26.3%

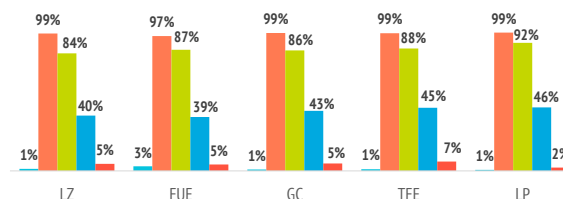
Other expenses

	LZ	FUE	GC	TFE	LP
Restaurants or cafes	68.1%	51.4%	61.7%	70.8%	63.8%
Supermarkets	51.7%	61.3%	45.3%	54.2%	77.5%
Car rental	52.0%	41.8%	28.3%	37.6%	64.8%
Organized excursions	28.0%	16.1%	16.7%	32.9%	26.1%
Taxi, transfer, chauffeur service	38.1%	32.1%	57.6%	49.7%	23.9%
Theme Parks	6.0%	5.6%	4.8%	13.5%	4.3%
Sport activities	18.1%	13.3%	5.9%	10.3%	3.3%
Museums	21.6%	4.5%	3.9%	1.7%	9.7%
Flights between islands	7.2%	5.3%	1.7%	6.2%	0.2%

Activities in the Canary Islands

Outdoor time per day	LZ	FUE	GC	TFE	LP
0 hours	1.4%	3.3%	1.0%	1.2%	0.7%
1 - 2 hours	14.2%	9.8%	12.5%	11.0%	7.3%
3 - 6 hours	44.6%	48.2%	43.4%	42.5%	46.4%
7 - 12 hours	34.6%	34.1%	37.8%	38.6%	43.1%
More than 12 hours	5.1%	4.6%	5.3%	6.7%	2.4%

0 hours More than 1 hour More than 3 hours More than 7 hours More than 12 hours



Activities in the Canary Islands

	LZ	FUE	GC	TFE	LP
Walk, wander	71.3%	68.0%	74.1%	81.8%	81.0%
Swimming pool, hotel facilities	67.1%	56.2%	67.4%	67.7%	64.6%
Beach	62.9%	71.2%	64.0%	56.2%	58.7%
Explore the island on their own	60.3%	67.2%	44.9%	50.5%	79.3%
Hiking	35.9%	33.1%	37.6%	42.4%	61.6%
Taste Canarian gastronomy	22.3%	9.8%	21.1%	27.9%	15.1%
Organized excursions	18.0%	12.4%	15.3%	22.0%	19.8%
Swim	16.5%	16.5%	14.0%	16.9%	9.7%
Sea excursions / whale watching	3.1%	9.1%	11.7%	20.6%	11.3%
Theme parks	8.0%	5.5%	6.9%	18.4%	1.2%
Museums / exhibitions	33.4%	8.9%	8.6%	4.9%	27.0%
Nightlife / concerts / shows	8.4%	3.9%	13.8%	5.9%	0.2%
Running	16.0%	13.8%	6.8%	6.4%	5.2%
Wineries / markets / popular festi	18.9%	3.6%	6.1%	6.3%	5.1%
Other Nature Activities	10.5%	8.2%	7.2%	6.0%	8.8%
Beauty and health treatments	1.7%	5.6%	4.7%	8.9%	2.3%
Cycling / Mountain bike	14.7%	4.0%	3.6%	4.5%	2.4%
Practice other sports	10.6%	2.7%	4.7%	3.6%	2.1%
Scuba Diving	6.9%	0.0%	2.6%	3.3%	1.2%
Astronomical observation	0.0%	2.6%	1.3%	4.4%	3.7%
Surf	2.3%	18.5%	0.7%	2.3%	0.2%
Golf	0.5%	1.8%	0.8%	2.1%	0.5%
Windsurf / Kitesurf	0.0%	9.2%	0.2%	1.1%	0.0%

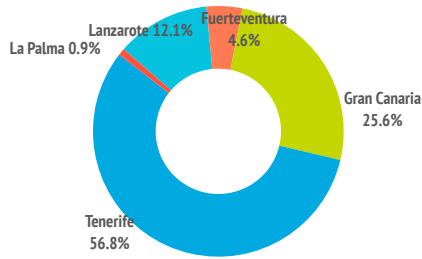
* Multi-choise question

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Which island do they choose?

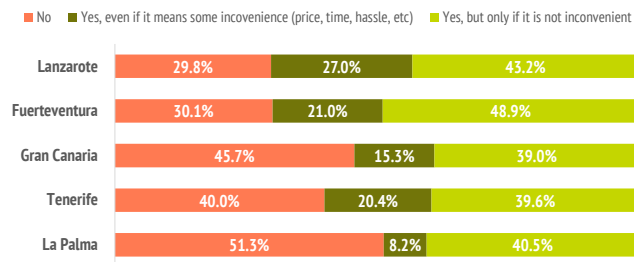


How many islands do they visit during their trip?

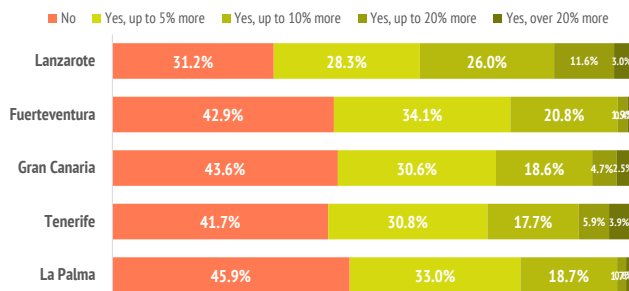
	LZ	FUE	GC	TFE	LP
One island	92.8%	91.1%	92.5%	92.7%	95.7%
Two islands	5.1%	8.9%	5.3%	6.5%	4.3%
Three or more islands	2.1%	-	2.1%	0.8%	-

Sustainable destination

When booking a trip, do they tend to choose the most sustainable options?



Would they be willing to spend more on travel to reduce their carbon footprint?



Perception during their stay*

	LZ	FUE	GC	TFE	LP
Quality of life on the island	8.02	7.97	8.10	8.07	7.71
Tolerance towards tourism	8.23	8.31	8.45	8.39	8.25
Cleanliness of the island	8.64	8.45	8.40	8.15	8.46
Air quality	8.36	8.48	8.38	8.25	8.53
Rational water consumption	7.35	7.28	7.48	7.43	7.57
Energy saving	6.79	6.95	7.01	7.01	6.77
Use of renewable energy	7.10	6.97	7.27	7.03	6.89
Recycling	7.14	7.02	7.17	7.16	7.09
Easy to get around by public transport	6.73	6.67	7.57	7.49	6.94
Overcrowding in tourist areas	6.69	6.79	6.79	6.78	7.02
Supply of local products	7.27	7.33	7.24	7.22	7.51

* Scale 0 - 10 (0 = Not important and 10 = Very important)

Which is the most visited place on each island?



The data refers to % of tourists on each island who have visited the place.

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	LZ	FUE	GC	TFE	LP
Average rating	8.57	8.46	8.68	8.72	8.51

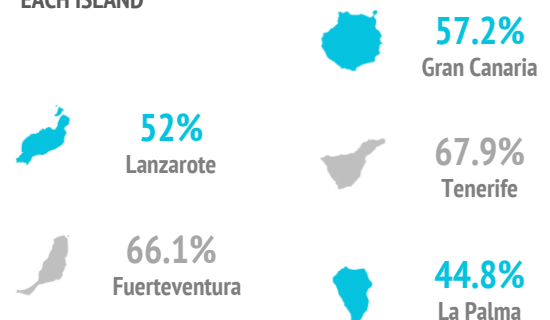
Experience in the Canary Islands	LZ	FUE	GC	TFE	LP
Worse or much worse than expected	4.8%	5.2%	3.2%	1.9%	0.0%
Lived up to expectations	57.4%	66.5%	62.3%	61.4%	58.6%
Better or much better than expected	37.8%	28.3%	34.5%	36.8%	41.4%

Future intentions (scale 1-10)	LZ	FUE	GC	TFE	LP
Return to the Canary Islands	8.60	8.71	8.50	8.70	7.94
Recommend visiting the Canary Islands	8.79	8.74	8.75	8.90	8.55

How many are loyal to the Canary Islands?

	LZ	FUE	GC	TFE	LP
Repeat tourists of the island	52.0%	66.1%	57.2%	67.9%	44.8%
At least 10 previous visits	9.7%	12.5%	11.1%	16.8%	12.5%
Repeat tourists	60.0%	70.0%	64.2%	72.3%	51.4%
At least 10 previous visits	22.7%	26.7%	21.2%	23.2%	14.9%

REPEAT TOURIST OF EACH ISLAND



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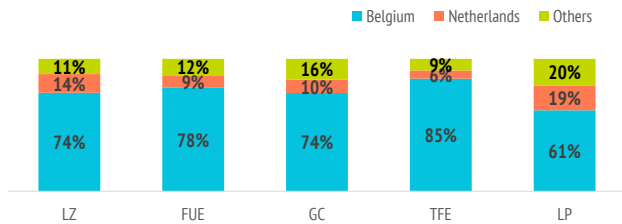


Where does the flight come from?



	LZ	FUE	GC	TFE	LP
Belgium	74.4%	78.4%	74.2%	85.0%	61.1%
Netherlands	14.1%	9.1%	10.1%	6.2%	18.8%
Mainland Spain	3.4%	-	3.8%	3.8%	9.2%
Germany	1.8%	1.5%	3.2%	1.5%	8.0%
Luxembourg	2.3%	9.3%	2.5%	1.0%	-
Portugal	-	-	4.6%	0.8%	2.9%
France	3.4%	-	0.8%	1.2%	-

SHARE OF TOURIST BY ORIGIN OF THE FLIGHT



Who do they come with?

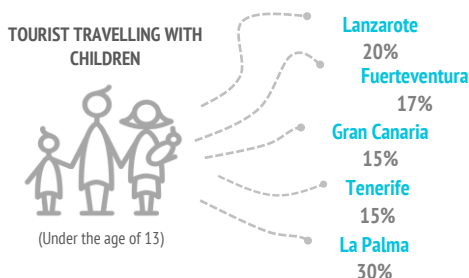


	LZ	FUE	GC	TFE	LP
Unaccompanied	6.0%	22.3%	11.9%	5.2%	7.2%
Only with partner	50.5%	33.7%	47.1%	47.8%	41.4%
Only with children (< 13 years old)	2.4%	13.3%	4.1%	3.5%	12.7%
Partner + children (< 13 years old)	12.7%	2.5%	5.1%	8.5%	13.1%
Other relatives	5.8%	11.4%	12.1%	8.6%	5.2%
Friends	7.9%	7.1%	6.1%	5.8%	2.2%
Work colleagues	0.0%	0.0%	0.0%	0.1%	0.0%
Organized trip	0.0%	0.0%	0.4%	0.3%	0.0%
Other combinations ⁽¹⁾	14.7%	9.7%	13.0%	20.2%	18.3%

(1) Different situations have been isolated

Tourists with children	20.0%	17.5%	14.7%	15.0%	29.5%
- Between 0 and 2 years old	0.0%	0.0%	0.8%	0.8%	6.2%
- Between 3 and 12 years old	19.2%	17.5%	13.9%	13.2%	23.3%
- Between 0-2 and 3-12 years	0.7%	0.0%	0.0%	1.0%	0.0%
Tourists without children	80.0%	82.5%	85.3%	85.0%	70.5%
Group composition:					
- 1 person	7.7%	25.9%	14.9%	9.1%	7.2%
- 2 people	57.1%	42.4%	61.2%	56.1%	44.8%
- 3 people	8.4%	13.9%	9.8%	14.9%	29.1%
- 4 or 5 people	21.6%	16.7%	10.2%	17.6%	15.6%
- 6 or more people	5.2%	1.0%	3.9%	2.4%	3.3%
Average group size:	2.76	2.28	2.38	2.57	2.70

*People who share the main expenses of the trip



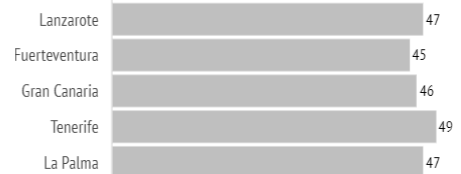
Who are they?



	LZ	FUE	GC	TFE	LP
Gender					
Men	68.7%	55.2%	58.6%	42.9%	47.3%
Women	31.3%	44.8%	41.4%	57.1%	52.7%
Age					
Average age (tourist > 15 years old)	47.2	45.0	46.1	48.5	47.2
Standard deviation	15.9	14.4	16.6	14.7	12.3
Age range (> 15 years old)					
16 - 24 years old	8.4%	14.3%	13.6%	6.2%	1.1%
25 - 30 years old	12.2%	5.3%	8.9%	7.7%	13.0%
31 - 45 years old	24.7%	26.8%	26.4%	28.6%	29.0%
46 - 60 years old	32.6%	38.7%	27.1%	35.5%	39.5%
Over 60 years old	22.1%	15.0%	23.9%	21.9%	17.4%
Occupation					
Salaried worker	57.1%	50.5%	49.7%	49.1%	72.5%
Self-employed	14.0%	4.9%	10.9%	13.2%	7.3%
Unemployed	0.0%	1.3%	0.0%	1.0%	0.0%
Business owner	7.2%	15.9%	14.1%	14.8%	9.1%
Student	5.8%	9.4%	5.0%	4.2%	4.4%
Retired	15.9%	14.9%	18.4%	15.8%	6.5%
Unpaid domestic work	0.0%	0.0%	0.5%	0.6%	0.0%
Others	0.0%	3.1%	1.4%	1.2%	0.2%
Annual household income level					
Less than €25,000	9.0%	27.0%	15.2%	13.1%	12.8%
€25,000 - €49,999	41.1%	29.3%	42.2%	41.6%	48.1%
€50,000 - €74,999	26.9%	29.3%	23.6%	26.0%	26.5%
More than €74,999	23.0%	14.4%	19.0%	19.3%	12.6%
Education level					
No studies	0.5%	1.5%	0.5%	0.0%	0.7%
Primary education	0.6%	1.4%	0.7%	0.7%	0.0%
Secondary education	20.3%	26.2%	31.5%	35.4%	19.7%
Higher education	78.6%	70.8%	67.4%	63.9%	79.5%

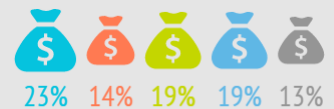


AVERAGE AGE (> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999

Legend: Lanzarote (blue), Fuerteventura (red), Gran Canaria (green), Tenerife (light blue), La Palma (grey)



% OF TOURISTS TRAVEL ONLY WITH PARTNER



Source: Encuesta sobre el Gasto Turístico (ISTAC).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.