

Tourist profile. Historical data (2019 - 2025)

BELGIUM: First Quarter



How many are they and how much do they spend?

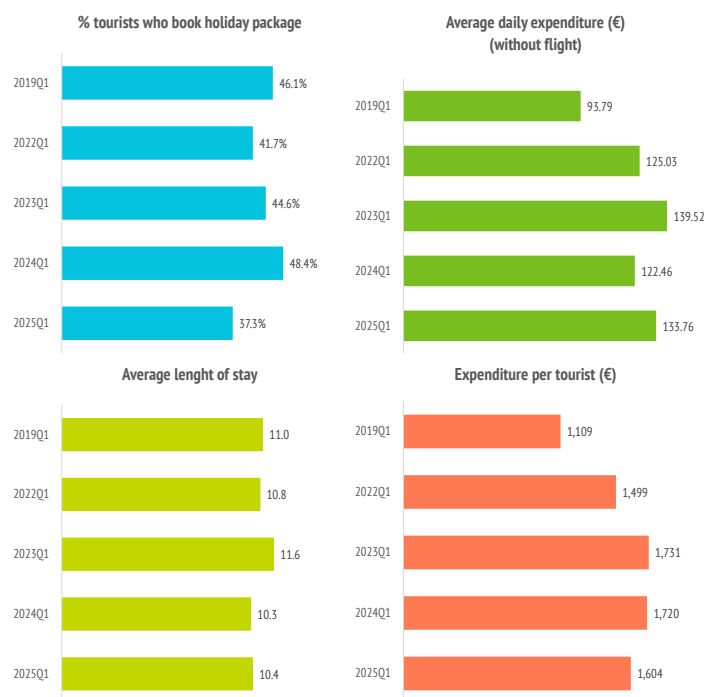


	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
TOURISTS					
Tourist arrivals (FRONTUR) (*)	95	91	102	124	125
Tourist arrivals ≥ 16 years old (EGT) (*)	83	85	93	114	109
- book holiday package (*)	38	36	42	55	41
- do not book holiday package (*)	45	50	52	59	68
- % tourists who book holiday package	46.1%	41.7%	44.6%	48.4%	37.3%
Children < 16 years old (FRONTUR - EGT) (*)	12	6	8	9	16
Expenditure per tourist (€)	1,109	1,499	1,731	1,720	1,604
- book holiday package	1,363	1,762	1,871	2,267	1,970
- holiday package	1,109	1,490	1,581	1,946	1,684
- others	254	273	290	322	287
- do not book holiday package	892	1,311	1,619	1,206	1,386
- flight	229	431	422	384	379
- accommodation	290	391	637	373	477
- others	373	489	560	450	530
Average lenght of stay	11.0	10.8	11.6	10.3	10.4
- Median	7.0	7.0	7.4	7.0	7.0
Average daily expenditure (€)	122.77	175.91	189.74	191.58	190.43
- Median	112.86	155.15	173.33	174.56	197.52
Average daily expenditure (without flight)	93.79	125.03	139.52	122.46	133.76
- Median	89.64	115.43	117.14	115.18	141.61
Average cost of the flight (€)	267.42	466.07	438.30	611.45	470.44
Total turnover (≥ 16 years old) (€m)	92	128	162	197	175
Turnover without flight (≥ 16 years old) (€m)	70	88	121	127	123

(*) Thousands of tourists

% Tourists whose spending has been greater than €0 in each item

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Accommodation:					
- Accommodation	77.9%	83.3%	79.5%	84.5%	76.8%
- Additional accommodation expenses	6.3%	6.8%	9.8%	8.0%	7.1%
Transport:					
- National/International Transport	93.3%	95.0%	93.5%	96.1%	96.5%
- Flights between islands	3.9%	7.2%	9.8%	5.2%	7.6%
- Taxi	40.6%	48.7%	47.5%	54.9%	37.6%
- Car rental	27.3%	33.4%	45.8%	36.8%	41.1%
- Public transport	10.5%	12.8%	9.8%	12.8%	12.4%
Food and drink:					
- Food purchases at supermarkets	55.4%	52.6%	57.9%	58.6%	57.6%
- Restaurants	61.6%	73.2%	75.1%	67.3%	73.4%
Leisure:					
- Organized excursions	13.2%	25.7%	25.3%	31.5%	26.5%
- Sport activities	6.6%	9.2%	13.6%	13.0%	11.2%
- Cultural activities	3.6%	0.0%	2.5%	2.1%	3.1%
- Museums	5.6%	4.5%	9.8%	6.2%	6.4%
- Theme Parks	3.7%	9.4%	8.3%	10.2%	5.8%
- Discos and pubs	2.6%	3.6%	7.0%	8.3%	5.7%
- Wellness	4.1%	5.6%	8.6%	5.6%	7.0%
Purchases of goods:					
- Souvenirs	46.7%	43.6%	41.2%	36.5%	47.6%
- Other expenses	0.0%	0.8%	0.5%	2.5%	0.7%
Other:					
- Medical or pharmaceutical expenses	7.9%	9.7%	11.2%	9.3%	5.8%
- Other expenses	4.6%	6.1%	4.9%	5.2%	5.1%



Average expenditure of tourists whose spending has been greater than €0 in each item

Expenditure per tourist and trip (€)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Accommodation:					
- Accommodation	788	792	1,112	869	955
- Additional accommodation expenses	646	715	1,009	806	864
Transport:					
- National/International Transport	521	811	811	929	887
- Flights between islands	287	491	469	636	488
- Flights between islands	67	66	55	63	113
- Taxi	60	93	114	78	94
- Car rental	84	142	149	122	153
- Public transport	24	20	25	30	40
Food and drink:					
- Food purchases at supermarkets	321	339	335	349	364
- Food purchases at supermarkets	143	95	99	136	131
- Restaurants	178	244	236	213	233
Leisure:					
- Organized excursions	439	423	466	582	495
- Organized excursions	65	98	84	74	94
- Sport activities	94	119	128	112	97
- Cultural activities	28	0	34	134	48
- Museums	32	28	28	36	42
- Theme Parks	31	42	65	51	50
- Discos and pubs	78	64	56	114	88
- Wellness	111	71	71	61	77
Purchases of goods:					
- Souvenirs	118	168	153	150	393
- Souvenirs	118	113	120	92	96
- Other expenses	0	56	33	58	297
Other:					
- Medical or pharmaceutical expenses	127	85	105	117	96
- Medical or pharmaceutical expenses	45	18	44	41	28
- Other expenses	82	67	60	76	67

Source: Encuesta sobre Gasto Turístico (EGT, ISTAC).

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

Tourist profile. Historical data (2019 - 2025)

BELGIUM: First Quarter



What is the main purpose of their trip?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Holiday, leisure	91.4%	91.6%	93.6%	90.9%	91.0%
Visiting family or friends	5.0%	7.0%	5.4%	7.6%	7.1%
Business and work	0.4%	0.8%	0.6%	0.0%	0.3%
Education and training	0.0%	0.0%	0.0%	0.3%	0.0%
Sports training	0.7%	0.0%	0.0%	0.4%	1.1%
Health or medical care	0.3%	0.0%	0.5%	0.7%	0.4%
Fairs and congresses	0.0%	0.0%	0.0%	0.0%	0.0%
Others	2.2%	0.5%	0.0%	0.0%	0.0%

What is the main motivation for their holidays?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Rest	55.2%	51.5%	49.6%	47.0%	39.7%
Enjoy family time	8.4%	11.6%	16.3%	9.4%	16.6%
Have fun	7.5%	6.0%	7.0%	10.4%	7.6%
Explore the destination	22.4%	22.2%	21.1%	26.8%	27.7%
Practice their hobbies	3.7%	4.6%	4.1%	4.3%	5.3%
Other reasons	2.8%	4.2%	1.8%	2.1%	3.1%

Where did they spend their main holiday last year? *

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Didn't have holidays	--	16.6%	6.9%	7.7%	4.1%
Canary Islands	--	16.2%	30.4%	21.6%	27.1%
Other destination	--	67.2%	62.7%	70.7%	68.8%
- Balearic Islands	--	2.7%	2.3%	0.9%	0.6%
- Rest of Spain	--	12.0%	11.3%	16.0%	13.3%
- Italy	--	6.5%	7.4%	8.0%	8.6%
- France	--	22.7%	16.0%	9.5%	15.5%
- Turkey	--	0.8%	1.4%	2.5%	1.5%
- Greece	--	4.4%	5.2%	5.7%	4.8%
- Portugal	--	6.6%	4.0%	3.3%	2.2%
- Croatia	--	4.0%	0.6%	1.0%	1.3%
- Egypt	--	0.0%	0.6%	1.5%	1.0%
- Tunisia	--	0.0%	0.0%	1.6%	0.9%
- Morocco	--	0.5%	0.7%	1.2%	2.7%
- Others	--	6.8%	13.3%	19.5%	16.3%

* Percentage of valid answers

What other destinations did they consider for this trip? *

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
None (I was clear about "this Canary Island")	--	37.3%	37.0%	29.0%	39.9%
Canary Islands (other island)	--	23.7%	25.9%	24.4%	25.7%
Other destination	--	39.0%	37.2%	46.5%	34.4%
- Balearic Islands	--	2.3%	3.1%	4.7%	3.2%
- Rest of Spain	--	10.1%	7.8%	11.2%	7.4%
- Italy	--	2.1%	4.0%	3.6%	4.3%
- France	--	2.7%	3.0%	2.7%	2.8%
- Turkey	--	2.4%	2.8%	2.7%	1.3%
- Greece	--	4.6%	5.2%	5.3%	3.5%
- Portugal	--	4.7%	2.8%	4.5%	5.1%
- Croatia	--	1.5%	2.2%	2.2%	0.4%
- Egypt	--	3.0%	3.4%	5.8%	3.4%
- Others	--	5.4%	2.9%	3.8%	3.0%

* Percentage of valid answers

Importance of each factor in the destination choice

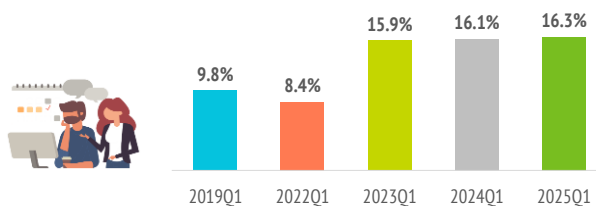
	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Climate	78.1%	78.8%	74.6%	74.9%	76.4%
Tranquility	53.2%	51.4%	48.5%	50.4%	54.3%
European belonging	39.5%	44.7%	37.6%	38.0%	40.1%
Sea	40.8%	46.9%	40.3%	41.4%	40.0%
Safety	39.6%	38.4%	38.7%	44.3%	39.9%
Landscapes	35.2%	40.1%	39.9%	39.9%	37.3%
Accommodation supply	34.0%	34.1%	33.5%	36.8%	36.3%
Price	33.5%	33.1%	28.6%	30.9%	31.3%
Beaches	27.4%	33.9%	27.2%	25.8%	27.4%
Gastronomy	23.7%	28.1%	24.9%	26.8%	25.5%
Environment	26.3%	26.3%	27.1%	29.1%	24.0%
Fun possibilities	21.4%	22.6%	23.0%	20.3%	23.6%
Effortless trip	18.0%	16.5%	18.9%	22.3%	23.5%
Authenticity	20.7%	21.1%	22.8%	21.8%	21.7%
Exoticism	16.5%	20.7%	17.1%	18.8%	16.4%
Hiking trail network	17.0%	16.2%	15.8%	15.5%	15.8%
Shopping	7.9%	9.4%	9.2%	10.4%	10.9%
Historical heritage	8.0%	6.5%	8.8%	9.3%	8.7%
Culture	5.7%	5.0%	7.1%	7.9%	6.0%
Nightlife	4.4%	5.1%	4.5%	3.9%	5.4%

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

How far in advance do they book their trip?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
The same day	0.6%	0.7%	1.7%	1.2%	2.0%
Between 1 and 30 days	26.1%	44.5%	24.0%	32.7%	27.9%
Between 1 and 2 months	31.9%	19.4%	27.0%	21.2%	25.9%
Between 3 and 6 months	31.6%	27.1%	31.3%	28.8%	28.0%
More than 6 months	9.8%	8.4%	15.9%	16.1%	16.3%

% TOURISTS WHO BOOK MORE THAN 6 MONTHS IN ADVANCE



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

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Previous visits to the Canary Islands	55.9%	46.7%	55.5%	42.5%	47.3%
Friends or relatives	25.4%	36.2%	27.0%	33.0%	30.0%
Internet or social media	44.5%	48.7%	40.4%	47.1%	46.6%
Mass Media	1.0%	1.8%	0.8%	1.1%	0.9%
Travel guides and magazines	13.2%	9.9%	9.1%	14.1%	10.5%
Travel Blogs or Forums	3.1%	5.2%	4.2%	4.7%	3.7%
Travel TV Channels	0.3%	0.0%	0.3%	0.7%	0.0%
Tour Operator or Travel Agency	21.6%	28.9%	26.5%	22.5%	19.9%
Public administrations or similar	0.3%	0.5%	0.0%	0.0%	0.2%
Others	0.5%	1.3%	2.2%	2.9%	3.6%

* Multi-choice question

Tourist profile. Historical data (2019 - 2025)

BELGIUM: First Quarter



With whom did they book their flight and accommodation?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Flight					
- Directly with the airline	51.3%	53.6%	47.3%	51.3%	57.7%
- Tour Operator or Travel Agency	48.7%	46.4%	52.7%	48.7%	42.3%
Accommodation					
- Directly with the accommodation	41.6%	40.9%	38.1%	36.8%	41.0%
- Tour Operator or Travel Agency	58.4%	59.1%	61.9%	63.2%	59.0%

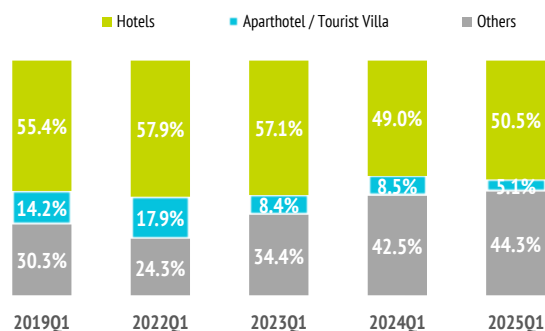
Where does the flight come from?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Belgium	83.3%	80.5%	80.4%	80.1%	76.5%
Netherlands	6.9%	3.9%	8.4%	6.7%	8.1%
Germany	2.8%	3.9%	2.1%	2.6%	6.4%
Luxembourg	1.0%	2.1%	1.9%	3.6%	3.5%
Spanish Mainland	3.1%	7.1%	3.6%	3.9%	3.3%
France	1.4%	0.7%	1.3%	1.0%	1.0%
Portugal	0.2%	0.9%	1.6%	1.0%	0.9%
Switzerland	0.5%	0.2%	0.1%	0.0%	0.2%
Others	0.0%	0.0%	0.1%	0.3%	0.1%
Slovakia	0.0%	0.0%	0.0%	0.2%	0.0%
Others	1.0%	0.7%	0.5%	0.5%	0.0%

Where do they stay?

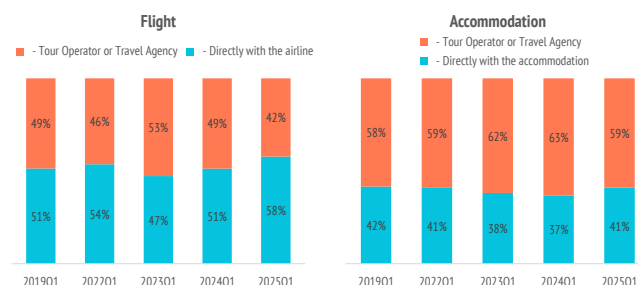
	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
1-2-3* Hotel	4.5%	6.8%	7.8%	8.0%	7.0%
4* Hotel	38.8%	39.3%	34.1%	27.9%	34.8%
5* Hotel / 5* Luxury Hotel	12.1%	11.7%	15.2%	13.1%	8.7%
Aparthotel / Tourist Villa	14.2%	17.9%	8.4%	8.5%	5.1%
House/room rented in a private dwelling	12.6%	5.1%	8.7%	23.6%	24.0%
Private accommodation (1)	9.6%	8.0%	10.7%	6.8%	16.4%
Others (Cottage, cruise, camping,...)	8.2%	11.2%	15.1%	12.1%	4.0%

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



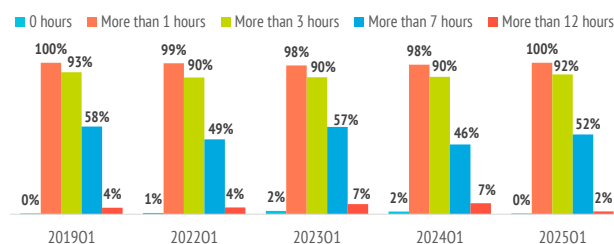
What do they book?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Room only	27.6%	26.2%	26.8%	30.2%	39.4%
Bed and Breakfast	13.6%	8.6%	11.4%	9.1%	13.1%
Half board	28.7%	31.8%	35.3%	26.8%	21.6%
Full board	4.6%	5.6%	1.6%	4.1%	3.7%
All inclusive	25.5%	27.7%	24.9%	29.8%	22.2%



Activities in the Canary Islands

Outdoor time per day	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
0 hours	0.4%	0.8%	2.2%	1.7%	0.5%
1 - 2 hours	6.2%	9.3%	7.8%	8.0%	7.6%
3 - 6 hours	35.6%	40.6%	32.7%	44.4%	39.6%
7 - 12 hours	53.4%	44.8%	50.7%	38.7%	50.6%
More than 12 hours	4.3%	4.5%	6.6%	7.2%	1.8%
Outdoor time per day	7.4	6.9	7.1	7.0	6.9



Activities in the Canary Islands	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Walk, wander	71.0%	75.9%	77.9%	81.0%	78.4%
Swimming pool, hotel facilities	59.0%	66.8%	66.9%	65.9%	61.2%
Beach	50.2%	62.1%	59.8%	56.9%	58.8%
Explore the island on their own	43.5%	44.4%	51.3%	50.8%	50.4%
Hiking	--	36.6%	40.2%	43.3%	39.4%
Taste Canarian gastronomy	19.2%	22.8%	24.5%	21.8%	21.6%
Organized excursions	16.4%	15.0%	19.3%	19.3%	18.8%
Sea excursions / whale watching	11.9%	10.7%	15.6%	13.5%	13.1%
Theme parks	10.4%	11.7%	13.4%	12.4%	11.2%
Museums / exhibitions	8.7%	7.7%	9.7%	10.5%	11.1%
Swim	--	34.7%	16.0%	11.3%	10.5%
Beauty and health treatments	5.0%	7.9%	6.8%	8.2%	8.8%
Nightlife / concerts / shows	9.0%	5.7%	8.1%	8.8%	7.8%
Wineries / markets / popular festivals	9.4%	3.9%	7.6%	8.3%	7.1%
Running	--	7.1%	8.0%	6.4%	6.6%
Other Nature Activities	--	5.8%	7.0%	5.2%	6.6%
Practice other sports	--	2.8%	4.7%	5.3%	5.3%
Astronomical observation	2.6%	2.5%	3.0%	4.9%	4.8%
Cycling / Mountain bike	--	4.3%	5.5%	3.7%	4.0%
Scuba Diving	--	4.4%	3.4%	2.9%	3.4%
Surf	--	3.4%	2.6%	2.5%	3.0%
Golf	--	2.0%	1.6%	2.8%	2.4%
Windsurf / Kitesurf	--	1.4%	1.1%	0.6%	0.7%

* Multi-choice question

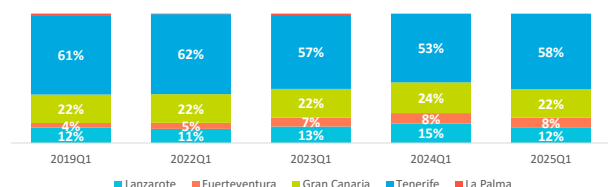
Tourist profile. Historical data (2019 - 2025)

BELGIUM: First Quarter



Which island do they choose?

Tourists (≥ 16 year old)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Lanzarote	9,756	9,360	11,843	17,088	12,688
Fuerteventura	2,976	3,917	6,461	9,254	8,616
Gran Canaria	18,187	18,909	20,683	26,986	23,984
Tenerife	50,086	52,799	53,201	60,492	63,070
La Palma	1,463	329	1,031	118	242



How many are loyal to the Canary Islands?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Repeat tourists	77.1%	66.4%	76.8%	67.0%	76.1%
At least 10 previous visits	27.4%	19.9%	19.6%	19.1%	24.8%
Repeat tourists (last 5 years)	75.6%	64.5%	70.8%	61.5%	70.0%
Repeat tourists (last 5 years)(5 or more visits)	23.2%	19.1%	20.2%	20.0%	24.9%

Who are they?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Gender					
Men	53.9%	47.7%	48.6%	51.4%	51.3%
Women	46.1%	52.3%	51.4%	48.6%	48.7%
Age					
Average age	55.1	50.7	52.0	50.0	50.3
Standard deviation	14.5	14.9	16.6	16.9	17.3
Age range					
16 - 24 years old	2.7%	4.3%	7.5%	6.9%	8.0%
25 - 30 years old	3.7%	6.3%	3.9%	9.5%	7.2%
31 - 45 years old	19.5%	28.1%	26.4%	25.5%	25.4%
46 - 60 years old	32.0%	30.6%	26.0%	27.7%	23.5%
Over 60 years old	42.0%	30.7%	36.3%	30.3%	35.9%
Occupation					
Salaried worker	34.0%	41.3%	34.9%	43.7%	43.0%
Self-employed	5.2%	20.7%	12.8%	11.9%	15.4%
Unemployed	0.4%	0.3%	0.0%	0.0%	0.3%
Business owner	16.0%	15.4%	13.1%	15.0%	8.2%
Student	1.5%	0.0%	5.0%	3.0%	4.1%
Retired	39.5%	20.6%	31.6%	25.2%	27.6%
Unpaid domestic work	1.1%	0.3%	0.5%	0.5%	0.0%
Others	2.3%	1.4%	2.1%	0.6%	1.5%
Annual household income level					
Less than €25,000	13.5%	12.9%	10.7%	8.2%	13.0%
€25,000 - €49,999	48.4%	39.9%	40.7%	39.1%	34.2%
€50,000 - €74,999	25.9%	26.4%	29.0%	31.8%	20.0%
More than €74,999	12.2%	20.8%	19.5%	20.9%	32.9%
Education level					
No studies	0.8%	0.9%	0.2%	0.3%	0.7%
Primary education	2.3%	0.3%	0.3%	2.2%	1.2%
Secondary education	42.3%	25.3%	25.6%	29.3%	24.9%
Higher education	54.6%	73.5%	73.9%	68.1%	73.3%

Share by islands	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Lanzarote	11.8%	11.0%	12.7%	15.0%	11.7%
Fuerteventura	3.6%	4.6%	6.9%	8.1%	7.9%
Gran Canaria	22.1%	22.2%	22.2%	23.7%	22.1%
Tenerife	60.7%	61.9%	57.1%	53.1%	58.1%
La Palma	1.8%	0.4%	1.1%	0.1%	0.2%

How many islands do they visit during their trip?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
One island	90.1%	90.6%	87.5%	90.7%	88.3%
Two islands	8.0%	8.5%	10.4%	8.6%	10.5%
Three or more islands	1.9%	0.9%	2.1%	0.7%	1.2%

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Average rating	8.55	8.68	8.62	8.45	8.44

Experience in the Canary Islands	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Worse or much worse than expected	3.8%	2.5%	2.1%	3.8%	1.8%
Lived up to expectations	64.8%	61.5%	62.1%	50.3%	69.4%
Better or much better than expected	31.4%	36.0%	35.8%	45.9%	28.8%

Future intentions (scale 0-10)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Return to the Canary Islands	8.70	8.64	8.67	8.53	8.73
Recommend visiting the Canary Islands	8.81	8.80	8.76	8.69	8.69

Who do they come with?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Unaccompanied	6.8%	8.5%	7.6%	8.8%	7.3%
Only with partner	68.4%	51.1%	51.0%	53.8%	52.6%
Only with children (< 13 years old)	3.6%	4.4%	3.4%	2.9%	3.6%
Partner + children (< 13 years old)	3.0%	7.7%	8.3%	4.8%	5.4%
Other relatives	4.6%	6.2%	7.2%	10.5%	9.0%
Friends	3.3%	7.0%	5.6%	6.4%	3.9%
Work colleagues	0.4%	0.2%	0.0%	0.5%	0.5%
Organized trip	0.0%	0.7%	0.0%	0.3%	0.0%
Other combinations (2)	9.9%	14.2%	16.9%	12.1%	17.8%

(2) Combination of some of the groups previously analyzed

Tourists with children	9.6%	13.7%	18.1%	13.9%	17.4%
- Between 0 and 2 years old	2.5%	1.2%	1.3%	0.5%	2.6%
- Between 3 and 12 years old	4.5%	12.1%	15.1%	12.0%	12.4%
- Between 0-2 and 3-12 years old	2.7%	0.5%	1.7%	1.4%	2.4%
Tourists without children	90.4%	86.3%	81.9%	86.1%	82.6%
Group composition:					
- 1 person	9.8%	14.1%	9.5%	9.4%	11.3%
- 2 people	72.0%	58.0%	56.4%	61.9%	55.8%
- 3 people	6.4%	13.5%	10.4%	6.6%	12.4%
- 4 or 5 people	10.4%	11.9%	19.1%	19.0%	12.2%
- 6 or more people	1.3%	2.4%	4.6%	3.1%	8.3%
Average group size:	2.25	2.40	2.72	2.59	2.70

*People who share the main expenses of the trip

Source: Encuesta sobre Gasto Turístico (EGT, ISTAC).

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