

Tourist profile trend (2016)

Canary Islands: Belgian market

How many are they and how much do they spend?



How do they book?



	2012	2013	2014	2015	2016
Tourist arrivals (> 16 years old)	259,762	264,652	276,226	311,605	355,163
Average daily expenditure (€)	135.31	139.62	137.53	139.87	145.42
- in their place of residence	97.82	103.35	100.62	103.00	109.43
- in the Canary Islands	37.49	36.27	36.91	36.87	35.99
Average length of stay	9.86	10.25	9.70	10.31	10.00
Turnover per tourist (€)	1,201	1,246	1,182	1,226	1,232
Total turnover (> 16 years old) (€m)	312	330	327	382	438
Belgian turnover: year on year change	--	5.6%	-0.9%	17.0%	14.5%
Belgian tourist arrivals: year on year change	--	1.9%	4.4%	12.8%	14.0%

	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	45.4%	44.6%	46.7%	45.3%	44.7%
- Tour Operator's website	66.8%	66.4%	71.6%	69.4%	72.0%
Accommodation	16.0%	16.1%	15.2%	15.1%	15.5%
- Accommodation's website	79.6%	81.1%	82.4%	80.1%	85.7%
Travel agency (High street)	19.3%	20.2%	16.4%	17.2%	19.3%
Online Travel Agency (OTA)	9.0%	11.3%	9.4%	11.6%	12.2%
No need to book accommodation	10.4%	7.9%	12.3%	10.7%	8.3%

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

	2012	2013	2014	2015	2016
Accommodation (**):	46.76	41.92	57.86	65.94	51.14
- Accommodation	42.19	36.15	52.65	55.70	41.26
- Additional accommodation expenses	4.58	5.77	5.21	10.24	9.88
Transport:	29.32	29.91	32.87	28.09	24.10
- Public transport	4.69	6.53	8.44	6.54	5.30
- Taxi	7.94	6.02	7.99	5.04	5.07
- Car rental	16.69	17.37	16.44	16.50	13.74
Food and drink:	135.10	170.59	134.55	143.79	135.60
- Food purchases at supermarkets	51.73	94.97	62.58	64.99	55.24
- Restaurants	83.37	75.62	71.97	78.80	80.36
Souvenirs:	76.24	71.30	63.99	69.87	69.15
Leisure:	33.59	35.72	32.03	29.99	27.43
- Organized excursions	16.00	15.38	16.26	14.66	14.94
- Leisure, amusement	4.18	2.70	4.28	2.54	3.19
- Trip to other islands	1.02	1.24	1.22	1.15	0.98
- Sporting activities	4.21	9.65	5.44	4.40	4.52
- Cultural activities	1.89	1.83	1.44	1.82	1.68
- Discos and disco-pubs	6.30	4.92	3.40	5.42	2.12
Others:	41.04	21.03	16.11	11.50	13.50
- Wellness	3.90	3.94	2.61	2.39	2.87
- Medical expenses	1.41	1.51	1.70	1.86	2.96
- Other expenses	35.73	15.58	11.80	7.25	7.67

	2012	2013	2014	2015	2016
Flight booking					
Tour Operator	57.4%	53.3%	56.0%	51.6%	53.6%
- Tour Operator's website	66.4%	62.9%	69.4%	67.5%	69.5%
Airline	22.1%	23.3%	22.6%	25.7%	24.2%
- Airline's website	96.4%	98.3%	96.0%	97.1%	95.8%
Travel agency (High street)	15.9%	16.9%	14.8%	15.1%	16.1%
Online Travel Agency (OTA)	4.6%	6.5%	6.5%	7.6%	6.1%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	11.3%	12.0%	12.1%	13.8%	9.7%
4* Hotel	45.6%	47.7%	46.2%	46.0%	50.1%
1-2-3* Hotel	14.2%	12.0%	10.4%	9.9%	10.1%
Apartment	18.7%	20.8%	19.2%	19.4%	22.3%
Property (privately-owned, friends, family)	8.6%	5.9%	10.5%	9.3%	6.0%
Others	1.5%	1.6%	1.6%	1.7%	1.8%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	51.7%	47.1%	54.8%	54.9%	52.5%
Percentage of women	48.3%	52.9%	45.2%	45.1%	47.5%

	2012	2013	2014	2015	2016
Age					
Average age (tourists > 16 years old)	46.5	46.5	46.4	47.2	49.1
Standard deviation	14.8	14.4	14.4	14.6	15.1

	2012	2013	2014	2015	2016
Age range (> 16 years old)					
16-24 years old	7.3%	8.4%	6.7%	7.4%	5.9%
25-30 years old	11.9%	9.3%	10.4%	10.6%	9.5%
31-45 years old	28.7%	27.5%	30.8%	24.4%	24.1%
46-60 years old	32.8%	36.8%	34.8%	38.6%	38.0%
Over 60 years old	19.4%	18.0%	17.3%	19.0%	22.6%

	2012	2013	2014	2015	2016
Occupation					
Business owner or self-employed	21.2%	18.5%	21.7%	20.6%	18.6%
Upper/Middle management employee	35.0%	40.2%	38.1%	39.1%	37.8%
Auxiliary level employee	15.9%	14.7%	15.0%	15.8%	15.4%
Students	5.1%	5.8%	5.1%	4.2%	4.0%
Retired	20.4%	17.8%	18.4%	18.1%	22.8%
Unemployed / unpaid dom. work	2.4%	3.0%	1.7%	2.2%	1.4%

	2012	2013	2014	2015	2016
Annual household income level					
€12,000 - €24,000	19.6%	16.6%	15.2%	17.3%	14.6%
€24,001 - €36,000	26.1%	26.7%	21.2%	21.4%	20.7%
€36,001 - €48,000	18.7%	19.1%	21.3%	19.3%	20.5%
€48,001 - €60,000	15.5%	15.9%	16.4%	17.9%	16.6%
€60,001 - €72,000	7.9%	7.0%	7.4%	8.1%	10.1%
€72,001 - €84,000	4.4%	5.1%	5.4%	5.1%	5.2%
More than €84,000	7.8%	9.5%	13.1%	10.9%	12.4%

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.7%	0.4%	0.6%	0.4%	0.4%
Between 2 and 7 days	9.2%	8.0%	9.4%	7.6%	6.3%
Between 8 and 15 days	11.4%	9.8%	9.5%	7.0%	7.3%
Between 16 and 30 days	18.0%	16.4%	16.3%	16.8%	14.5%
Between 31 and 90 days	28.9%	30.8%	30.2%	34.6%	33.0%
More than 90 days	31.8%	34.6%	34.1%	33.5%	38.6%

What do they book at their place of residence?



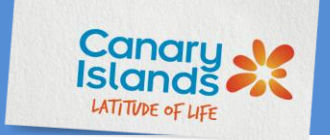
	2012	2013	2014	2015	2016
Flight only	17.6%	12.0%	17.1%	16.8%	12.8%
Flight and accommodation (room only)	13.9%	16.6%	14.5%	15.0%	15.6%
Flight and accommodation (B&B)	4.9%	3.9%	5.0%	3.7%	4.5%
Flight and accommodation (half board)	29.8%	29.6%	23.2%	27.4%	28.2%
Flight and accommodation (full board)	2.8%	3.2%	4.4%	3.5%	4.4%
Flight and accommodation (all inclusive)	30.9%	34.7%	35.8%	33.6%	34.4%
% Tourists using low-cost airlines	31.4%	30.5%	30.2%	35.1%	31.6%
Other expenses in their place of residence:					
- Car rental	10.4%	13.4%	11.7%	14.2%	12.7%
- Sporting activities	6.2%	5.0%	4.7%	4.5%	4.5%
- Excursions	6.4%	6.6%	6.5%	7.5%	8.3%
- Trip to other islands	0.7%	0.8%	0.5%	0.7%	0.6%

(*) 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)	2012	2013	2014	2015	2016
- Lanzarote	23,329	23,717	25,736	31,990	35,148
- Fuerteventura	12,092	22,924	11,426	13,324	15,239
- Gran Canaria	71,530	71,013	74,078	82,320	100,151
- Tenerife	145,174	139,978	158,374	174,755	192,249
- La Palma	5,011	5,781	3,543	6,807	8,952

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	9.1%	9.0%	9.4%	10.3%	10.0%
- Fuerteventura	4.7%	8.7%	4.2%	4.3%	4.3%
- Gran Canaria	27.8%	27.0%	27.1%	26.6%	28.5%
- Tenerife	56.5%	53.1%	58.0%	56.5%	54.7%
- La Palma	1.9%	2.2%	1.3%	2.2%	2.5%

Who do they come with?



Why do they choose the Canary Islands?



	2012	2013	2014	2015	2016
Unaccompanied	8.3%	7.6%	9.0%	9.6%	8.0%
Only with partner	52.1%	52.4%	50.1%	54.3%	52.0%
Only with children (under the age of 13)	1.6%	1.1%	1.4%	2.1%	1.0%
Partner + children (under the age of 13)	11.9%	11.5%	12.5%	9.5%	10.4%
Other relatives	3.9%	5.1%	4.4%	4.1%	3.7%
Friends	6.4%	6.1%	5.2%	5.5%	6.3%
Work colleagues	0.1%	0.4%	0.5%	0.1%	0.1%
Other combinations ⁽¹⁾	15.6%	15.9%	16.9%	14.8%	18.6%

Aspects influencing the choice	2012	2013	2014	2015	2016
Climate/sun	95.7%	95.5%	95.6%	94.2%	96.9%
Tranquillity/rest/relaxation	46.3%	45.4%	44.3%	45.5%	45.0%
Scenery	24.2%	24.9%	30.3%	29.8%	28.2%
Beaches	21.1%	24.8%	23.2%	21.5%	20.7%
Security	8.6%	7.3%	7.8%	12.0%	15.1%
Visiting new places	13.6%	13.6%	14.2%	12.3%	12.7%
Ease of travel	14.0%	12.0%	10.9%	12.4%	10.5%
Quality of the environment	6.4%	7.3%	7.1%	9.3%	7.5%
Shopping	7.7%	7.5%	7.0%	5.3%	6.8%
Active tourism	3.7%	5.8%	6.2%	5.4%	5.9%
Suitable destination for children	5.4%	5.1%	6.5%	5.4%	4.0%
Ease of travel	2.6%	2.7%	2.3%	1.3%	3.0%
Nautical activities	2.6%	3.1%	2.4%	2.7%	2.9%
Culture	1.4%	1.9%	1.4%	1.7%	2.2%
Nightlife/fun	3.0%	3.4%	2.2%	2.2%	2.1%
Rural tourism	0.9%	1.4%	0.6%	1.7%	1.7%

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

* Multi-choice question

How do they rate the destination?



Impression of their stay	2012	2013	2014	2015	2016
Good or very good (% tourists)	94.6%	95.5%	95.0%	93.7%	96.0%
Average rating (scale 1-10)	8.86	8.92	8.89	8.86	9.01

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	76.1%	73.9%	76.1%	76.7%	75.1%
In love (at least 10 previous visits)	17.7%	17.2%	16.5%	17.5%	18.2%

What did motivate them to come?



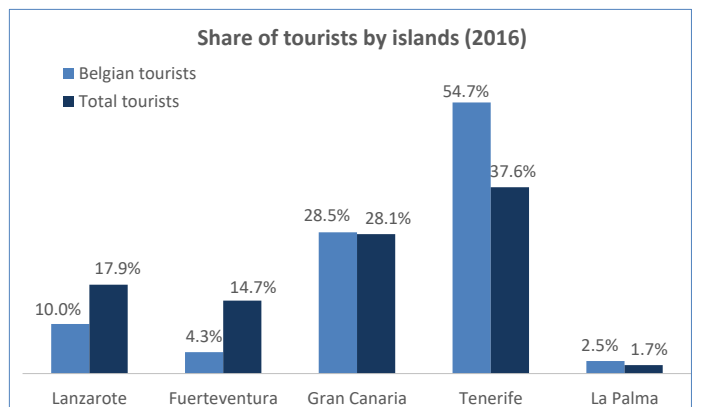
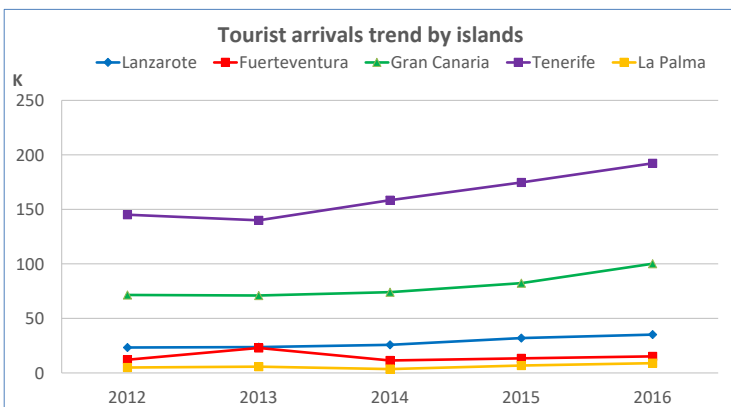
Where does the flight come from?



Ten main origin countries	2012	2013	2014	2015	2016
Belgium	243,317	238,018	238,110	274,306	321,772
Spanish Mainland	1,811	11,042	7,883	10,667	14,331
Germany	3,767	8,484	6,907	8,559	7,405
Netherlands	5,447	2,774	16,456	13,379	4,070
France	765	494	1,549	421	1,134
United Kingdom	0	166	221	682	640
Ireland	0	0	173	95	239
Norway	0	0	211	0	0
Sweden	0	0	244	0	0
Switzerland	0	0	806	0	0

Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	66.6%	62.1%	65.0%	63.5%	61.9%
Recommendation by friends or relatives	36.5%	35.7%	36.6%	34.6%	35.7%
The Canary Islands television channel	0.6%	0.5%	0.3%	0.5%	0.5%
Other television or radio channels	0.9%	1.4%	0.8%	0.5%	0.2%
Information in the press/magazines/books	4.1%	4.2%	4.3%	5.8%	3.1%
Attendance at a tourism fair	1.0%	1.2%	1.1%	0.8%	0.8%
Tour Operator's brochure or catalogue	11.8%	17.1%	14.1%	12.3%	12.9%
Recommendation by Travel Agency	11.9%	10.3%	9.3%	11.3%	11.1%
Information obtained via the Internet	18.2%	19.3%	19.0%	19.6%	20.4%
Senior Tourism programme	0.5%	0.0%	0.0%	0.0%	0.2%
Others	5.5%	4.8%	4.2%	3.8%	3.5%

* 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.