

Tourist profile trend (2017)

BELGIUM

How many are they and how much do they spend?



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR)	307,771	326,024	365,454	395,014	411,002
Tourist arrivals (> 16 years old)	264,652	276,226	311,605	355,163	365,868
Average daily expenditure (€)	139.62	137.53	139.87	145.42	149.72
. in their place of residence	103.35	100.62	103.00	109.43	111.13
. in the Canary Islands	36.27	36.91	36.87	35.99	38.59
Average length of stay	10.25	9.70	10.31	10.00	9.61
Turnover per tourist (€)	1,246	1,182	1,226	1,232	1,251
Total turnover (> 16 years old) (€m)	383	386	448	487	514
Tourist arrivals: year on year change	--	5.9%	12.1%	8.1%	4.0%
Turnover: year on year change	--	0.6%	16.2%	8.6%	5.7%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	14.0%	13.8%	13.7%	13.7%	13.0%
- Additional accommodation expenses	5.5%	5.9%	7.6%	5.7%	7.8%
Transport:					
- Public transport	16.8%	16.5%	15.8%	13.3%	13.5%
- Taxi	21.7%	21.6%	16.5%	19.3%	21.1%
- Car rental	22.2%	21.0%	20.7%	19.4%	20.9%
Food and drink:					
- Food purchases at supermarkets	48.8%	49.3%	47.2%	45.8%	48.6%
- Restaurants	49.3%	49.6%	47.7%	48.0%	50.3%
Souvenirs:	59.5%	58.7%	56.5%	54.7%	54.6%
Leisure:					
- Organized excursions	20.2%	19.7%	18.1%	17.8%	18.8%
- Leisure, amusement	5.9%	6.6%	5.3%	5.5%	6.7%
- Trip to other islands	2.3%	2.2%	1.6%	1.3%	1.8%
- Sporting activities	6.8%	7.2%	5.3%	5.4%	7.8%
- Cultural activities	3.7%	3.9%	4.1%	4.0%	4.1%
- Discos and disco-pubs	4.6%	3.5%	4.5%	2.2%	3.1%
Others:					
- Wellness	6.8%	5.0%	4.4%	4.7%	5.6%
- Medical expenses	4.7%	5.9%	4.9%	5.6%	5.9%
- Other expenses	10.6%	10.1%	7.9%	7.4%	8.5%

2017



+4%
TOURISTS
411,002



+2%
TRAVEL EXPENSES
€1,251



+6%
TURNOVER
€514 MILL

What do they book at their place of residence?



	2013	2014	2015	2016	2017
Flight only	12.0%	17.1%	16.8%	12.8%	16.5%
Flight and accommodation (room only)	16.6%	14.5%	15.0%	15.6%	18.2%
Flight and accommodation (B&B)	3.9%	5.0%	3.7%	4.5%	5.1%
Flight and accommodation (half board)	29.6%	23.2%	27.4%	28.2%	24.8%
Flight and accommodation (full board)	3.2%	4.4%	3.5%	4.4%	3.6%
Flight and accommodation (all inclusive)	34.7%	35.8%	33.6%	34.4%	31.8%
<u>% Tourists using low-cost airlines</u>	30.5%	30.2%	35.1%	31.6%	30.1%
<u>Other expenses in their place of residence:</u>					
- Car rental	13.4%	11.7%	14.2%	12.7%	12.7%
- Sporting activities	5.0%	4.7%	4.5%	4.5%	4.3%
- Excursions	6.6%	6.5%	7.5%	8.3%	6.3%
- Trip to other islands	0.8%	0.5%	0.7%	0.6%	0.8%

How do they book?



	2013	2014	2015	2016	2017
Accommodation booking					
Tour Operator	44.6%	46.7%	45.3%	44.7%	41.4%
- Tour Operator's website	66.4%	71.6%	69.4%	72.0%	73.9%
Accommodation	16.1%	15.2%	15.1%	15.5%	14.8%
- Accommodation's website	81.1%	82.4%	80.1%	85.7%	81.5%
Travel agency (High street)	20.2%	16.4%	17.2%	19.3%	20.5%
Online Travel Agency (OTA)	11.3%	9.4%	11.6%	12.2%	12.2%
No need to book accommodation	7.9%	12.3%	10.7%	8.3%	11.2%
Flight booking					
Tour Operator	53.3%	56.0%	51.6%	53.6%	52.8%
- Tour Operator's website	62.9%	69.4%	67.5%	69.5%	71.3%
Airline	23.3%	22.6%	25.7%	24.2%	23.6%
- Airline's website	98.3%	96.0%	97.1%	95.8%	96.0%
Travel agency (High street)	16.9%	14.8%	15.1%	16.1%	17.3%
Online Travel Agency (OTA)	6.5%	6.5%	7.6%	6.1%	6.3%

How far in advance do they book their trip?



	2013	2014	2015	2016	2017
The same day they leave	0.4%	0.6%	0.4%	0.4%	0.3%
Between 2 and 7 days	8.0%	9.4%	7.6%	6.3%	5.2%
Between 8 and 15 days	9.8%	9.5%	7.0%	7.3%	10.2%
Between 16 and 30 days	16.4%	16.3%	16.8%	14.5%	13.3%
Between 31 and 90 days	30.8%	30.2%	34.6%	33.0%	31.5%
More than 90 days	34.6%	34.1%	33.5%	38.6%	39.5%

Who are they?



	2013	2014	2015	2016	2017
Gender					
Men	47.1%	54.8%	54.9%	52.5%	52.9%
Women	52.9%	45.2%	45.1%	47.5%	47.1%
Age					
Average age (tourists > 16 years old)	46.5	46.4	47.2	49.1	48.7
Standard deviation	14.4	14.4	14.6	15.1	15.2
Age range (> 16 years old)					
16-24 years old	8.4%	6.7%	7.4%	5.9%	7.0%
25-30 years old	9.3%	10.4%	10.6%	9.5%	7.4%
31-45 years old	27.5%	30.8%	24.4%	24.1%	26.3%
46-60 years old	36.8%	34.8%	38.6%	38.0%	35.4%
Over 60 years old	18.0%	17.3%	19.0%	22.6%	24.0%
Occupation					
Business owner or self-employed	18.5%	21.7%	20.6%	18.6%	20.4%
Upper/Middle management employee	40.2%	38.1%	39.1%	37.8%	36.3%
Auxiliary level employee	14.7%	15.0%	15.8%	15.4%	15.2%
Students	5.8%	5.1%	4.2%	4.0%	4.1%
Retired	17.8%	18.4%	18.1%	22.8%	22.8%
Unemployed / unpaid dom. work	3.0%	1.7%	2.2%	1.4%	1.3%
Annual household income level					
€12,000 - €24,000	16.6%	15.2%	17.3%	14.6%	14.3%
€24,001 - €36,000	26.7%	21.2%	21.4%	20.7%	24.3%
€36,001 - €48,000	19.1%	21.3%	19.3%	20.5%	17.0%
€48,001 - €60,000	15.9%	16.4%	17.9%	16.6%	14.9%
€60,001 - €72,000	7.0%	7.4%	8.1%	10.1%	10.8%
€72,001 - €84,000	5.1%	5.4%	5.1%	5.2%	6.0%
More than €84,000	9.5%	13.1%	10.9%	12.4%	12.9%

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Which island do they choose?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	23,717	25,736	31,990	35,148	42,791
- Fuerteventura	22,924	11,426	13,324	15,239	12,547
- Gran Canaria	71,013	74,078	82,320	100,151	103,260
- Tenerife	139,978	158,374	174,755	192,249	196,542
- La Palma	5,781	3,543	6,807	8,952	6,675

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	9.0%	9.4%	10.3%	10.0%	11.8%
- Fuerteventura	8.7%	4.2%	4.3%	4.3%	3.5%
- Gran Canaria	27.0%	27.1%	26.6%	28.5%	28.5%
- Tenerife	53.1%	58.0%	56.5%	54.7%	54.3%
- La Palma	2.2%	1.3%	2.2%	2.5%	1.8%

Where do they stay?

	2013	2014	2015	2016	2017
5* Hotel	12.0%	12.1%	13.8%	9.7%	10.0%
4* Hotel	47.7%	46.2%	46.0%	50.1%	43.6%
1-2-3* Hotel	12.0%	10.4%	9.9%	10.1%	10.3%
Apartment	20.8%	19.2%	19.4%	22.3%	25.2%
Property (privately-owned, friends, family)	5.9%	10.5%	9.3%	6.0%	8.7%
Others	1.6%	1.6%	1.7%	1.8%	2.3%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	95.5%	95.6%	94.2%	96.9%	95.4%
Tranquillity/rest/relaxation	45.4%	44.3%	45.5%	45.0%	41.3%
Scenery	24.9%	30.3%	29.8%	28.2%	27.5%
Beaches	24.8%	23.2%	21.5%	20.7%	23.2%
Security	7.3%	7.8%	12.0%	15.1%	14.2%
Visiting new places	13.6%	14.2%	12.3%	12.7%	12.7%
Price	12.0%	10.9%	12.4%	10.5%	10.0%
Quality of the environment	7.3%	7.1%	9.3%	7.5%	7.5%
Active tourism	5.8%	6.2%	5.4%	5.9%	7.1%
Suitable destination for children	5.1%	6.5%	5.4%	4.0%	6.2%
Shopping	7.5%	7.0%	5.3%	6.8%	5.4%
Ease of travel	2.7%	2.3%	1.3%	3.0%	3.2%
Nautical activities	3.1%	2.4%	2.7%	2.9%	3.1%
Nightlife/fun	3.4%	2.2%	2.2%	2.1%	2.6%
Golf	0.7%	1.1%	1.0%	0.7%	1.9%
Theme parks	2.0%	1.7%	1.3%	1.5%	1.7%

* Multi-chose question

Who do they come with?

	2013	2014	2015	2016	2017
Unaccompanied	7.6%	9.0%	9.6%	8.0%	8.3%
Only with partner	52.4%	50.1%	54.3%	52.0%	50.6%
Only with children (under the age of 13)	1.1%	1.4%	2.1%	1.0%	2.3%
Partner + children (under the age of 13)	11.5%	12.5%	9.5%	10.4%	10.6%
Other relatives	5.1%	4.4%	4.1%	3.7%	4.1%
Friends	6.1%	5.2%	5.5%	6.3%	3.9%
Work colleagues	0.4%	0.5%	0.1%	0.1%	0.5%
Other combinations ⁽¹⁾	15.9%	16.9%	14.8%	18.6%	19.7%

* Multi-chose 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)	95.5%	95.0%	93.7%	96.0%	96.0%
Average rating (scale 1-10)	8.92	8.89	8.86	9.01	8.98

How many are loyal to the Canary Islands?

Repeat tourists	2013	2014	2015	2016	2017
At least 1 previous visit	73.9%	76.1%	76.7%	75.1%	75.3%
At least 10 previous visits	17.2%	16.5%	17.5%	18.2%	18.0%

Where does the flight come from?

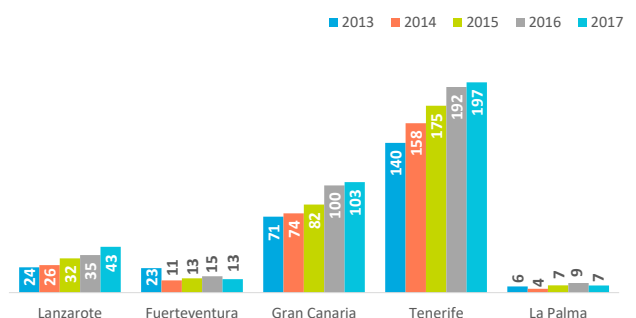
Tourists (> 16 years old)	2013	2014	2015	2016	2017
Belgium	89.9%	86.2%	88.0%	90.6%	82.6%
Netherlands	1.0%	6.0%	4.3%	1.1%	6.2%
Germany	3.2%	2.5%	2.7%	2.1%	4.0%
Spanish Mainland	4.2%	2.9%	3.4%	4.0%	3.5%
France	0.2%	0.6%	0.1%	0.3%	1.0%
United Kingdom	0.1%	0.1%	0.2%	0.2%	0.2%
Italy	0.0%	0.0%	0.0%	0.0%	0.1%
Sweden	0.0%	0.1%	0.0%	0.0%	0.1%
Ireland	0.0%	0.1%	0.0%	0.1%	0.0%
Others	1.4%	1.7%	1.1%	1.6%	2.3%

What did motivate them to come?

Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	62.1%	65.0%	63.5%	61.9%	62.3%
Recommendation by friends/relatives	35.7%	36.6%	34.6%	35.7%	37.3%
The Canary Islands television channel	0.5%	0.3%	0.5%	0.5%	0.1%
Other television or radio channels	1.4%	0.8%	0.5%	0.2%	0.5%
Information in press/magazines/books	4.2%	4.3%	5.8%	3.1%	3.4%
Attendance at a tourism fair	1.2%	1.1%	0.8%	0.8%	0.5%
Tour Operator's brochure or catalogue	17.1%	14.1%	12.3%	12.9%	11.6%
Recommendation by Travel Agency	10.3%	9.3%	11.3%	11.1%	11.8%
Information obtained via the Internet	19.3%	19.0%	19.6%	20.4%	18.7%
Senior Tourism programme	0.0%	0.0%	0.0%	0.2%	0.3%
Others	4.8%	4.2%	3.8%	3.5%	4.3%

* Multi-chose 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.