

# Tourist profile trend (2016)

## Belgium: Fourth Quarter

### How many are they and how much do they spend?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	68,072	72,034	74,073	85,016	93,957
Average daily expenditure (€)	131.01	147.21	137.59	146.37	160.07
. in their place of residence	95.05	109.40	94.82	106.93	121.64
. in the Canary Islands	35.95	37.81	42.77	39.44	38.43
Average length of stay	10.14	10.24	9.74	8.83	9.42
Turnover per tourist (€)	1,211	1,231	1,125	1,154	1,267
Total turnover (> 16 years old) (€m)	82.5	88.7	83.3	98.1	119
Share of total turnover	26.4%	26.9%	25.5%	25.7%	27.2%
Share of total tourist	26.2%	27.2%	26.8%	27.3%	26.5%

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

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
<b>Accommodation (**):</b>	41.30	43.44	60.39	55.20	48.24
- Accommodation	36.26	36.70	52.84	48.25	42.46
- Additional accommodation expenses	5.04	6.74	7.55	6.96	5.78
<b>Transport:</b>	27.26	34.63	40.76	27.01	25.93
- Public transport	3.84	7.05	12.61	7.71	5.07
- Taxi	7.58	5.34	10.21	6.49	6.06
- Car rental	15.84	22.24	17.94	12.81	14.81
<b>Food and drink:</b>	151.92	155.11	159.32	136.52	152.79
- Food purchases at supermarkets	56.36	67.60	73.79	56.28	54.35
- Restaurants	95.56	87.50	85.52	80.24	98.45
<b>Souvenirs:</b>	79.04	64.12	64.28	66.86	66.74
<b>Leisure:</b>	23.95	33.08	26.55	23.12	25.53
- Organized excursions	11.88	13.61	10.84	10.88	12.35
- Leisure, amusement	2.43	1.50	4.63	1.37	2.96
- Trip to other islands	0.20	2.61	2.35	1.01	0.44
- Sporting activities	3.44	7.64	5.78	3.64	3.10
- Cultural activities	1.39	1.50	1.39	1.34	1.76
- Discos and disco-pubs	4.61	6.21	1.55	4.88	4.92
<b>Others:</b>	66.77	35.14	17.38	10.78	14.09
- Wellness	2.99	5.67	3.15	2.54	2.22
- Medical expenses	0.93	2.59	1.68	0.74	0.81
- Other expenses	62.85	26.89	12.55	7.50	11.06

### How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	1.0%	0.3%	0.4%	1.0%	0.5%
Between 2 and 7 days	8.0%	8.1%	9.3%	6.4%	5.8%
Between 8 and 15 days	10.1%	8.4%	7.8%	4.0%	3.1%
Between 16 and 30 days	18.2%	13.7%	18.4%	15.2%	16.9%
Between 31 and 90 days	33.4%	33.6%	35.9%	39.8%	36.9%
More than 90 days	29.4%	35.9%	28.2%	33.5%	36.9%

### What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	20.1%	16.6%	20.4%	15.2%	11.8%
Flight and accommodation (room only)	13.2%	15.6%	20.3%	13.4%	18.4%
Flight and accommodation (B&B)	5.8%	4.3%	4.7%	6.6%	7.9%
Flight and accommodation (half board)	32.3%	26.4%	22.2%	31.0%	28.3%
Flight and accommodation (full board)	2.1%	2.5%	3.4%	5.2%	4.6%
Flight and accommodation (all inclusive)	26.6%	34.7%	29.0%	28.6%	29.0%
<b>% Tourists using low-cost airlines</b>	23.0%	22.6%	37.9%	33.0%	29.8%
<b>Other expenses in their place of residence:</b>					
- Car rental	8.6%	13.9%	15.3%	15.3%	12.7%
- Sporting activities	4.6%	4.3%	2.4%	4.7%	5.0%
- Excursions	4.4%	3.2%	7.0%	5.7%	6.4%
- Trip to other islands	0.6%	1.2%	1.0%	0.8%	0.9%

### How do they book?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
<b>Accommodation booking</b>					
<b>Tour Operator</b>	47.3%	38.5%	38.8%	44.1%	42.4%
- Tour Operator's website	61.8%	66.6%	73.9%	67.4%	63.0%
<b>Accommodation</b>	17.8%	16.6%	24.7%	14.3%	19.2%
- Accommodation's website	80.1%	80.9%	82.4%	85.2%	87.8%
<b>Travel agency (High street)</b>	17.9%	22.0%	11.3%	19.8%	19.6%
<b>Online Travel Agency (OTA)</b>	6.6%	10.2%	10.4%	11.8%	12.8%
<b>No need to book accommodation</b>	10.4%	12.6%	14.7%	10.0%	6.1%

### Flight booking

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
<b>Tour Operator</b>	59.8%	52.1%	53.2%	50.3%	56.2%
- Tour Operator's website	68.8%	62.0%	79.1%	65.7%	60.8%
<b>Airline</b>	20.5%	21.2%	28.2%	25.2%	23.3%
- Airline's website	92.6%	98.6%	100.0%	95.0%	99.1%
<b>Travel agency (High street)</b>	16.9%	20.4%	11.0%	17.7%	13.7%
<b>Online Travel Agency (OTA)</b>	2.7%	6.3%	7.5%	6.8%	6.8%

### Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	12.7%	11.9%	11.8%	14.9%	10.1%
4* Hotel	44.4%	49.3%	41.6%	49.0%	48.4%
1-2-3* Hotel	12.2%	9.0%	8.0%	8.4%	13.8%
Apartment	20.0%	18.9%	23.7%	16.6%	22.4%
Property (privately-owned, friends, family)	9.5%	8.2%	11.2%	10.0%	4.5%
Others	1.2%	2.6%	3.7%	1.1%	0.8%

### Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
<b>Gender</b>					
Percentage of men	51.0%	48.8%	53.5%	55.9%	55.3%
Percentage of women	49.0%	51.2%	46.5%	44.1%	44.7%

### Age

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Average age (tourists > 16 years old)	49.7	46.2	49.0	49.2	50.2
Standard deviation	14.2	12.9	14.1	13.7	13.8

### Age range (> 16 years old)

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
16-24 years old	2.6%	3.9%	3.3%	4.2%	3.9%
25-30 years old	9.5%	11.2%	10.5%	7.2%	6.3%
31-45 years old	26.4%	32.4%	25.0%	23.4%	27.9%
46-60 years old	38.7%	38.4%	38.6%	44.5%	38.9%
Over 60 years old	22.8%	14.1%	22.5%	20.7%	23.0%

### Occupation

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Business owner or self-employed	25.0%	19.1%	21.5%	22.0%	22.0%
Upper/Middle management employee	27.1%	44.4%	33.1%	38.6%	39.4%
Auxiliary level employee	14.9%	14.7%	14.4%	14.4%	14.3%
Students	3.7%	2.3%	3.2%	1.4%	1.5%
Retired	27.8%	14.9%	26.1%	21.7%	21.4%
Unemployed / unpaid dom. work	1.5%	4.6%	1.6%	1.9%	1.4%

### Annual household income level

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
€12,000 - €24,000	19.8%	16.7%	11.9%	16.4%	13.9%
€24,001 - €36,000	27.6%	25.5%	22.3%	25.1%	20.7%
€36,001 - €48,000	19.4%	16.1%	23.1%	19.2%	15.8%
€48,001 - €60,000	16.6%	19.8%	18.3%	17.6%	16.1%
€60,001 - €72,000	5.1%	8.7%	5.7%	8.0%	13.2%
€72,001 - €84,000	2.8%	5.9%	3.1%	4.2%	6.7%
More than €84,000	8.6%	7.3%	15.6%	9.5%	13.6%

(\*) 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.

# Tourist profile trend (2016)

## Belgium: Fourth Quarter

### Which island do they choose?



Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	5,570	6,273	7,721	8,692	9,924
- Fuerteventura	2,444	2,966	2,245	4,507	4,032
- Gran Canaria	18,750	20,071	19,843	22,686	26,143
- Tenerife	39,321	40,945	42,253	45,952	51,009
- La Palma	1,600	1,418	1,012	2,168	2,145

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	8.2%	8.8%	10.6%	10.3%	10.6%
- Fuerteventura	3.6%	4.1%	3.1%	5.4%	4.3%
- Gran Canaria	27.7%	28.0%	27.2%	27.0%	28.0%
- Tenerife	58.1%	57.1%	57.8%	54.7%	54.7%
- La Palma	2.4%	2.0%	1.4%	2.6%	2.3%

### Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	8.9%	8.2%	9.4%	11.4%	10.1%
Only with partner	60.1%	56.0%	58.0%	53.6%	45.8%
Only with children (under the age of 13)	0.8%	1.0%	0.8%	1.9%	0.3%
Partner + children (under the age of 13)	8.5%	11.6%	7.0%	10.0%	11.4%
Other relatives	5.3%	3.8%	4.7%	3.7%	3.5%
Friends	5.3%	5.9%	5.4%	5.2%	6.4%
Work colleagues	0.0%	1.0%	1.0%	0.5%	0.0%
Other combinations <sup>(1)</sup>	11.1%	12.6%	13.7%	13.8%	22.5%

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

### How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	96.2%	97.0%	95.3%	95.7%	97.1%
Average rating (scale 1-10)	8.86	9.03	8.91	8.91	9.05

### How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	81.6%	77.1%	78.0%	78.1%	80.7%
In love (at least 10 previous visits)	24.9%	18.2%	21.9%	16.5%	18.4%

### Where does the flight come from?



Ten main origin countries	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Belgium	94.9%	86.4%	90.4%	86.8%	88.0%
Spanish Mainland	0.1%	8.6%	1.1%	5.4%	6.5%
Germany	1.2%	2.3%	3.8%	3.0%	1.9%
Netherlands	2.1%	1.9%	3.2%	3.2%	1.6%
France	0.0%	0.0%	0.3%	0.3%	1.1%
United Kingdom	0.0%	0.0%	0.0%	0.4%	0.3%
Norway	0.0%	0.0%	0.3%	0.0%	0.0%
Austria	0.0%	0.0%	0.0%	0.0%	0.0%
Ireland	0.0%	0.0%	0.0%	0.0%	0.0%
Italy	0.0%	0.0%	0.0%	0.0%	0.0%



### Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	95.8%	96.1%	98.4%	96.2%	97.5%
Tranquillity/rest/relaxation	41.1%	45.2%	45.7%	47.4%	45.6%
Scenery	26.7%	27.4%	30.0%	36.1%	27.9%
Beaches	22.2%	24.0%	21.4%	21.3%	19.4%
Security	7.0%	5.2%	5.4%	12.4%	16.1%
Visiting new places	12.0%	16.8%	12.4%	7.7%	9.2%
Price	11.7%	9.9%	11.2%	9.6%	9.2%
Quality of the environment	8.3%	8.9%	7.3%	10.7%	7.2%
Shopping	9.8%	9.2%	6.6%	6.0%	6.0%
Suitable destination for children	5.0%	5.9%	3.6%	3.6%	5.4%
Active tourism	2.8%	6.8%	6.8%	4.6%	5.2%
Ease of travel	2.0%	1.4%	2.6%	2.0%	3.6%
Security against natural catastrophes	0.4%	0.9%	0.0%	0.8%	3.5%
Nautical activities	1.7%	3.0%	2.2%	2.4%	2.9%
Culture	1.3%	1.0%	1.1%	1.0%	2.2%
Rural tourism	1.2%	1.1%	0.4%	2.4%	1.7%

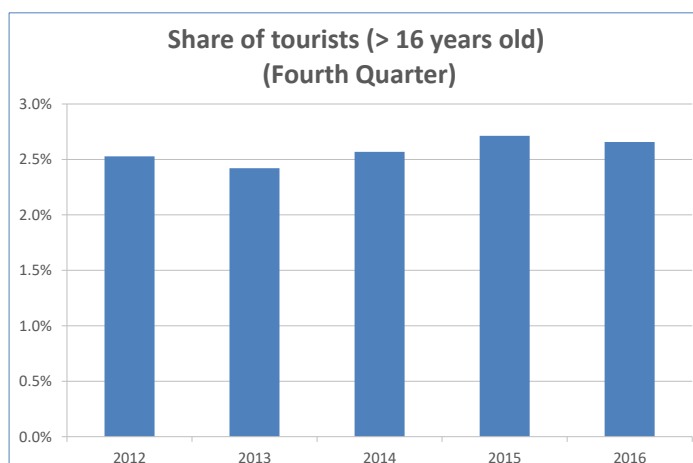
\* Multi-choice question

### What did motivate them to come?



Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	72.6%	65.6%	70.4%	65.8%	68.2%
Recommendation by friends or relatives	34.9%	37.5%	36.5%	34.5%	32.8%
The Canary Islands television channel	0.0%	0.4%	0.0%	0.0%	1.2%
Other television or radio channels	0.9%	0.9%	0.4%	0.6%	0.6%
Information in the press/magazines/books	4.7%	4.7%	5.9%	5.7%	3.8%
Attendance at a tourism fair	0.6%	1.1%	0.4%	0.7%	0.7%
Tour Operator's brochure or catalogue	8.9%	12.1%	9.5%	11.6%	10.6%
Recommendation by Travel Agency	7.7%	9.8%	6.7%	8.1%	12.1%
Information obtained via the Internet	18.2%	16.8%	19.9%	17.8%	18.9%
Senior Tourism programme	0.7%	0.0%	0.0%	0.0%	0.0%
Others	6.5%	8.5%	5.1%	3.3%	2.2%

\* 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.