

Tourist profile trend (2016)

Belgium: First Quarter

How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	71,532	72,048	72,129	75,059	84,623
Average daily expenditure (€)	140.18	135.32	143.42	138.13	145.69
. in their place of residence	101.43	98.61	105.53	96.61	106.99
. in the Canary Islands	38.74	36.71	37.89	41.53	38.71
Average length of stay	10.20	11.29	9.67	11.45	10.86
Turnover per tourist (€)	1,219	1,303	1,297	1,272	1,260
Total turnover (> 16 years old) (€m)	87.2	93.9	93.5	95.5	107
Share of total turnover	27.9%	28.5%	28.6%	25.0%	24.4%
Share of total tourist	27.5%	27.2%	26.1%	24.1%	23.8%

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

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation (**):	56.88	39.12	98.95	110.45	70.75
- Accommodation	50.47	34.86	93.89	99.67	58.74
- Additional accommodation expenses	6.41	4.26	5.06	10.78	12.00
Transport:	30.05	30.91	39.56	37.73	29.69
- Public transport	4.96	6.56	12.70	11.77	7.93
- Taxi	8.69	6.31	8.89	3.90	7.29
- Car rental	16.40	18.04	17.97	22.06	14.46
Food and drink:	135.91	153.42	124.80	185.39	154.41
- Food purchases at supermarkets	48.33	67.95	47.88	85.51	68.85
- Restaurants	87.58	85.47	76.92	99.87	85.57
Souvenirs:	75.96	85.21	58.58	66.10	51.97
Leisure:	24.24	31.54	30.11	31.24	25.08
- Organized excursions	9.49	14.26	13.25	13.32	11.95
- Leisure, amusement	3.37	1.53	2.17	2.41	2.58
- Trip to other islands	1.23	0.91	0.61	0.62	1.18
- Sporting activities	3.80	10.13	8.78	7.38	5.68
- Cultural activities	1.26	0.87	1.69	2.09	2.02
- Discos and disco-pubs	5.09	3.84	3.60	5.42	1.67
Others:	21.94	17.66	20.46	14.01	17.28
- Wellness	2.40	5.16	3.36	3.56	3.13
- Medical expenses	1.24	1.57	1.57	0.70	5.18
- Other expenses	18.31	10.94	15.52	9.76	8.97

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	0.5%	0.5%	0.0%	0.6%	0.5%
Between 2 and 7 days	11.3%	6.8%	10.8%	6.6%	4.1%
Between 8 and 15 days	11.8%	9.4%	10.4%	9.4%	12.1%
Between 16 and 30 days	20.0%	19.4%	16.7%	19.3%	14.0%
Between 31 and 90 days	29.5%	27.6%	30.4%	35.4%	34.8%
More than 90 days	26.9%	36.3%	31.8%	28.7%	34.3%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	21.2%	3.7%	17.9%	22.9%	14.3%
Flight and accommodation (room only)	10.7%	20.8%	13.1%	21.6%	16.7%
Flight and accommodation (B&B)	4.5%	4.4%	5.5%	2.8%	5.2%
Flight and accommodation (half board)	30.3%	37.1%	21.8%	22.3%	31.0%
Flight and accommodation (full board)	3.6%	4.4%	7.1%	3.2%	5.3%
Flight and accommodation (all inclusive)	29.7%	29.6%	34.6%	27.3%	27.5%
% Tourists using low-cost airlines	37.6%	30.0%	28.1%	48.4%	37.7%
Other expenses in their place of residence:					
- Car rental	10.4%	14.7%	11.4%	17.7%	14.2%
- Sporting activities	4.4%	5.4%	4.1%	3.0%	4.7%
- Excursions	6.4%	3.2%	4.4%	4.5%	7.7%
- Trip to other islands	1.4%	1.2%	1.0%	0.5%	0.7%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	45.4%	54.1%	44.6%	33.0%	44.9%
- Tour Operator's website	70.3%	61.2%	62.4%	76.2%	68.0%
Accommodation	12.8%	17.5%	12.4%	23.1%	16.7%
- Accommodation's website	67.9%	72.9%	82.4%	83.6%	79.0%
Travel agency (High street)	18.4%	15.8%	20.4%	13.4%	18.7%
Online Travel Agency (OTA)	11.7%	11.5%	9.7%	16.6%	12.0%
No need to book accommodation	11.6%	1.1%	12.9%	13.9%	7.8%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight booking					
Tour Operator	60.3%	59.0%	55.7%	41.7%	55.2%
- Tour Operator's website	63.8%	60.2%	59.0%	78.4%	70.6%
Airline	20.4%	21.1%	22.0%	35.3%	22.4%
- Airline's website	96.0%	98.6%	94.9%	100.0%	98.4%
Travel agency (High street)	12.2%	13.9%	16.8%	10.8%	15.6%
Online Travel Agency (OTA)	7.0%	6.0%	5.5%	12.2%	6.7%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	9.4%	13.0%	12.6%	8.9%	10.6%
4* Hotel	47.9%	48.0%	46.5%	40.7%	50.3%
1-2-3* Hotel	15.2%	15.1%	10.7%	9.3%	9.4%
Apartment	15.8%	23.8%	18.5%	29.4%	21.1%
Property (privately-owned, friends, family)	9.2%	0.1%	10.7%	9.2%	5.9%
Others	2.4%	0.1%	1.0%	2.5%	2.7%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	53.4%	49.2%	56.1%	62.2%	49.1%
Percentage of women	46.6%	50.8%	43.9%	37.8%	50.9%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Age					
Average age (tourists > 16 years old)	50.4	51.5	49.9	49.3	52.2
Standard deviation	14.8	15.2	14.5	14.2	15.3

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Age range (> 16 years old)					
16-24 years old	4.1%	7.3%	3.7%	3.5%	4.6%
25-30 years old	8.0%	4.7%	7.4%	10.9%	6.4%
31-45 years old	26.1%	22.0%	27.6%	24.1%	23.2%
46-60 years old	34.1%	32.8%	37.3%	37.8%	35.2%
Over 60 years old	27.7%	33.2%	24.0%	23.8%	30.6%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Occupation					
Business owner or self-employed	21.9%	22.0%	28.7%	27.4%	19.5%
Upper/Middle management employee	32.0%	28.6%	32.6%	34.8%	35.4%
Auxiliary level employee	10.8%	10.0%	11.0%	15.1%	9.4%
Students	3.7%	5.9%	2.8%	2.9%	3.3%
Retired	28.0%	32.2%	23.6%	18.6%	30.4%
Unemployed / unpaid dom. work	3.5%	1.4%	1.2%	1.2%	2.1%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Annual household income level					
€12,000 - €24,000	21.4%	16.8%	18.0%	16.1%	15.1%
€24,001 - €36,000	27.4%	28.1%	16.9%	13.1%	19.6%
€36,001 - €48,000	14.4%	19.6%	22.3%	18.1%	19.9%
€48,001 - €60,000	14.9%	15.4%	12.7%	22.5%	13.8%
€60,001 - €72,000	9.7%	2.7%	9.7%	10.4%	10.2%
€72,001 - €84,000	5.7%	4.9%	7.5%	5.4%	3.6%
More than €84,000	6.5%	12.5%	13.0%	14.3%	17.7%

(*) 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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Belgium: First Quarter

Which island do they choose?



Tourists (> 16 years old)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	6,466	5,480	4,432	7,231	8,818
- Fuerteventura	3,448	13,067	2,666	2,114	3,974
- Gran Canaria	17,209	16,378	19,112	17,241	19,682
- Tenerife	41,326	35,115	44,446	46,418	47,621
- La Palma	1,463	1,988	1,272	1,158	3,214

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	9.2%	7.6%	6.2%	9.7%	10.6%
- Fuerteventura	4.9%	18.1%	3.7%	2.9%	4.8%
- Gran Canaria	24.6%	22.7%	26.6%	23.2%	23.6%
- Tenerife	59.1%	48.8%	61.8%	62.6%	57.2%
- La Palma	2.1%	2.8%	1.8%	1.6%	3.9%

Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	9.9%	8.8%	9.6%	7.8%	8.3%
Only with partner	54.9%	60.8%	56.1%	59.5%	56.6%
Only with children (under the age of 13)	2.1%	0.4%	1.6%	2.0%	0.3%
Partner + children (under the age of 13)	10.7%	7.8%	8.5%	10.0%	7.8%
Other relatives	2.3%	4.0%	3.2%	3.5%	4.8%
Friends	6.1%	7.0%	5.2%	5.3%	7.1%
Work colleagues	0.0%	0.4%	0.5%	0.0%	0.3%
Other combinations ⁽¹⁾	14.0%	10.7%	15.2%	11.9%	14.9%

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

How do they rate the destination?



Impression of their stay	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Good or very good (% tourists)	93.5%	95.7%	94.4%	93.1%	94.0%
Average rating (scale 1-10)	8.81	8.88	8.84	8.90	8.95

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	82.7%	82.8%	84.4%	82.3%	80.4%
In love (at least 10 previous visits)	19.4%	23.6%	19.4%	20.4%	20.7%

Where does the flight come from?



Ten main origin countries	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Belgium	95.7%	96.0%	88.4%	87.2%	90.4%
Germany	1.4%	2.2%	1.8%	3.0%	3.6%
Spanish Mainland	0.1%	1.0%	4.3%	2.6%	2.2%
Netherlands	1.1%	0.5%	2.9%	6.3%	0.6%
Ireland	0.0%	0.0%	0.0%	0.1%	0.3%
France	0.0%	0.0%	0.4%	0.2%	0.0%
United Kingdom	0.0%	0.2%	0.0%	0.0%	0.0%
Switzerland	0.0%	0.0%	1.1%	0.0%	0.0%
Austria	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	97.2%	97.0%	96.7%	95.5%	97.1%
Tranquillity/rest/relaxation	43.4%	43.7%	45.4%	43.3%	44.8%
Scenery	24.1%	24.5%	31.6%	33.6%	32.8%
Beaches	19.2%	23.9%	17.3%	18.0%	21.2%
Security	12.0%	5.4%	9.7%	9.4%	12.7%
Price	14.8%	11.5%	8.6%	13.9%	12.3%
Visiting new places	9.4%	8.3%	11.5%	10.3%	9.9%
Active tourism	3.5%	6.8%	6.2%	4.9%	9.3%
Quality of the environment	6.2%	9.4%	8.4%	11.2%	7.2%
Shopping	6.5%	6.0%	7.8%	3.9%	5.2%
Suitable destination for children	3.5%	3.9%	6.3%	5.4%	2.6%
Culture	1.4%	3.4%	1.7%	0.6%	2.3%
Nautical activities	1.8%	2.3%	0.5%	2.2%	2.0%
Ease of travel	4.2%	5.4%	3.5%	2.1%	1.7%
Rural tourism	1.5%	0.9%	0.8%	1.4%	1.2%
Security against natural catastrophes	0.6%	0.0%	0.8%	0.5%	1.1%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	74.7%	70.1%	71.4%	69.4%	68.1%
Recommendation by friends or relatives	31.8%	31.5%	35.4%	36.1%	34.0%
The Canary Islands television channel	0.5%	0.5%	0.6%	0.2%	0.0%
Other television or radio channels	0.8%	1.8%	0.6%	0.4%	0.2%
Information in the press/magazines/books	3.1%	3.8%	3.3%	5.8%	3.3%
Attendance at a tourism fair	0.0%	0.9%	0.9%	1.6%	0.3%
Tour Operator's brochure or catalogue	10.5%	13.5%	14.8%	8.9%	10.9%
Recommendation by Travel Agency	11.7%	4.9%	8.9%	7.3%	10.3%
Information obtained via the Internet	17.0%	19.5%	13.4%	16.9%	19.3%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	4.1%	3.1%	3.6%	3.6%	3.2%

* 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.