Tourist profile trend (2017)

Belgium: First Quarter

How many are they and how much do they spend?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	72,048	72,129	75,059	84,623	90,825
Average daily expenditure (€)	135.32	143.42	138.13	145.69	160.13
. in their place of residence	98.61	105.53	96.61	106.99	120.47
. in the Canary Islands	36.71	37.89	41.53	38.71	39.67
Average lenght of stay	11.29	9.67	11.45	10.86	10.83
Turnover per tourist (€)	1,303	1,297	1,272	1,260	1,455
Total turnover (> 16 years old) (€m)	93.9	93.5	95.5	107	132
Share of total turnover	28.5%	28.6%	25.0%	24.4%	--
Share of total tourist	27.2%	26.1%	24.1%	23.8%	--
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	39.12	98.95	110.45	70.75	93.06
- Accommodation	34.86	93.89	99.67	58.74	72.07
- Additional accommodation expenses	4.26	5.06	10.78	12.00	21.00
Transport:	30.91	39.56	37.73	29.69	28.48
- Public transport	6.56	12.70	11.77	7.93	3.35
- Taxi	6.31	8.89	3.90	7.29	7.68
- Car rental	18.04	17.97	22.06	14.46	17.46
Food and drink:	153.42	124.80	185.39	154.41	172.67
- Food purchases at supermarkets	67.95	47.88	85.51	68.85	61.40
- Restaurants	85.47	76.92	99.87	85.57	111.27
Souvenirs:	85.21	58.58	66.10	51.97	65.84
Leisure:	31.54	30.11	31.24	25.08	23.99
- Organized excursions	14.26	13.25	13.32	11.95	10.69
- Leisure, amusement	1.53	2.17	2.41	2.58	2.75
- Trip to other islands	0.91	0.61	0.62	1.18	3.66
- Sporting activities	10.13	8.78	7.38	5.68	3.08
- Cultural activities	0.87	1.69	2.09	2.02	0.87
- Discos and disco-pubs	3.84	3.60	5.42	1.67	2.94
Others:	17.66	20.46	14.01	17.28	13.85
- Wellness	5.16	3.36	3.56	3.13	3.50
- Medical expenses	1.57	1.57	0.70	5.18	4.93
- Other expenses	10.94	15.52	9.76	8.97	5.42

How far in advance do they book their trip?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.5%	0.0%	0.6%	0.5%	0.0%
Between 2 and 7 days	6.8%	10.8%	6.6%	4.1%	4.9%
Between 8 and 15 days	9.4%	10.4%	9.4%	12.1%	6.6%
Between 16 and 30 days	19.4%	16.7%	19.3%	14.0%	10.8%
Between 31 and 90 days	27.6%	30.4%	35.4%	34.8%	31.2%
More than 90 days	36.3%	31.8%	28.7%	34.3%	46.6%

What do they book at their place of residence?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	3.7%	17.9%	22.9%	14.3%	14.9%
Flight and accommodation (room only)	20.8%	13.1%	21.6%	16.7%	22.1%
Flight and accommodation (B&B)	4.4%	5.5%	2.8%	5.2%	7.1%
Flight and accommodation (half board)	37.1%	21.8%	22.3%	31.0%	29.5%
Flight and accommodation (full board)	4.4%	7.1%	3.2%	5.3%	5.0%
Flight and accommodation (all inclusive)	29.6%	34.6%	27.3%	27.5%	21.4%
% Tourists using low-cost airlines	30.0%	28.1%	48.4%	37.7%	29.8%
Other expenses in their place of residence:					
- Car rental	14.7%	11.4%	17.7%	14.2%	15.2%
- Sporting activities	5.4%	4.1%	3.0%	4.7%	4.1%
- Excursions	3.2%	4.4%	4.5%	7.7%	7.6%
- Trip to other islands	1.2%	1.0%	0.5%	0.7%	2.0%

How do they book?

Accommodation booking	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tour Operator	54.1%	44.6%	33.0%	44.9%	36.7%
- Tour Operator´s website	61.2%	62.4%	76.2%	68.0%	64.4%
Accommodation	17.5%	12.4%	23.1%	16.7%	17.4%
- Accommodation´s website	72.9%	82.4%	83.6%	79.0%	81.5%
Travel agency (High street)	15.8%	20.4%	13.4%	18.7%	21.3%
Online Travel Agency (OTA)	11.5%	9.7%	16.6%	12.0%	15.2%
No need to book accommodation	1.1%	12.9%	13.9%	7.8%	9.3%

Flight booking	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tour Operator	59.0%	55.7%	41.7%	55.2%	50.6%
- Tour Operator´s website	60.2%	59.0%	78.4%	70.6%	67.4%
Airline	21.1%	22.0%	35.3%	22.4%	24.6%
- Airline´s website	98.6%	94.9%	100.0%	98.4%	100.0%
Travel agency (High street)	13.9%	16.8%	10.8%	15.6%	18.7%
Online Travel Agency (OTA)	6.0%	5.5%	12.2%	6.7%	6.1%

Where do they stay?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	13.0%	12.6%	8.9%	10.6%	10.4%
4* Hotel	48.0%	46.5%	40.7%	50.3%	46.0%
1-2-3* Hotel	15.1%	10.7%	9.3%	9.4%	6.8%
Apartment	23.8%	18.5%	29.4%	21.1%	25.3%
Property (privately-owned,friends,family)	0.1%	10.7%	9.2%	5.9%	7.8%
Others	0.1%	1.0%	2.5%	2.7%	3.7%

Who are they?

Gender	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Percentage of men	49.2%	56.1%	62.2%	49.1%	53.3%
Percentage of women	50.8%	43.9%	37.8%	50.9%	46.7%
Age					
Average age (tourists > 16 years old)	51.5	49.9	49.3	52.2	53.1
Standard deviation	15.2	14.5	14.2	15.3	14.9
Age range (> 16 years old)					
16-24 years old	7.3%	3.7%	3.5%	4.6%	3.9%
25-30 years old	4.7%	7.4%	10.9%	6.4%	4.2%
31-45 years old	22.0%	27.6%	24.1%	23.2%	23.7%
46-60 years old	32.8%	37.3%	37.8%	35.2%	33.2%
Over 60 years old	33.2%	24.0%	23.8%	30.6%	34.9%
Occupation					
Business owner or self-employed	22.0%	28.7%	27.4%	19.5%	21.2%
Upper/Middle management employee	28.6%	32.6%	34.8%	35.4%	32.4%
Auxiliary level employee	10.0%	11.0%	15.1%	9.4%	9.4%
Students	5.9%	2.8%	2.9%	3.3%	3.6%
Retired	32.2%	23.6%	18.6%	30.4%	32.7%
Unemployed / unpaid dom. work	1.4%	1.2%	1.2%	2.1%	0.8%
Annual household income level					
€12,000 - €24,000	16.8%	18.0%	16.1%	15.1%	16.1%
€24,001 - €36,000	28.1%	16.9%	13.1%	19.6%	22.3%
€36,001 - €48,000	19.6%	22.3%	18.1%	19.9%	17.4%
€48,001 - €60,000	15.4%	12.7%	22.5%	13.8%	12.0%
€60,001 - €72,000	2.7%	9.7%	10.4%	10.2%	13.4%
€72,001 - €84,000	4.9%	7.5%	5.4%	3.6%	8.5%
More than €84,000	12.5%	13.0%	14.3%	17.7%	10.5%

(*) 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 (2017)

Belgium: First Quarter

Which island do they choose?

Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	5,480	4,432	7,231	8,818	10,166
- Fuerteventura	13,067	2,666	2,114	3,974	2,743
- Gran Canaria	16,378	19,112	17,241	19,682	22,677
- Tenerife	35,115	44,446	46,418	47,621	53,087
- La Palma	1,988	1,272	1,158	3,214	1,294

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	7.6%	6.2%	9.7%	10.6%	11.3%
- Fuerteventura	18.1%	3.7%	2.9%	4.8%	3.0%
- Gran Canaria	22.7%	26.6%	23.2%	23.6%	25.2%
- Tenerife	48.8%	61.8%	62.6%	57.2%	59.0%
- La Palma	2.8%	1.8%	1.6%	3.9%	1.4%

Who do they come with?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	8.8%	9.6%	7.8%	8.3%	9.1%
Only with partner	60.8%	56.1%	59.5%	56.6%	53.3%
Only with children (under the age of 13)	0.4%	1.6%	2.0%	0.3%	2.0%
Partner + children (under the age of 13)	7.8%	8.5%	10.0%	7.8%	11.7%
Other relatives	4.0%	3.2%	3.5%	4.8%	5.0%
Friends	7.0%	5.2%	5.3%	7.1%	2.0%
Work colleagues	0.4%	0.5%	0.0%	0.3%	0.0%
Other combinations [1]	10.7%	15.2%	11.9%	14.9%	16.9%

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

How do they rate the destination?

Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	95.7%	94.4%	93.1%	94.0%	96.5%
Average rating (scale 1-10)	8.88	8.84	8.90	8.95	9.05

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	82.8%	84.4%	82.3%	80.4%	80.7%
In love (at least 10 previous visits)	23.6%	19.4%	20.4%	20.7%	24.3%

Where does the flight come from?

Ten main origin markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Belgium	96.0%	88.4%	87.2%	90.4%	85.4%
Germany	2.2%	1.8%	3.0%	3.6%	4.7%
Spanish Mainland	1.0%	4.3%	2.6%	2.2%	4.6%
Netherlands	0.5%	2.9%	6.3%	0.6%	3.2%
France	0.0%	0.4%	0.2%	0.0%	0.5%
Sweden	0.0%	0.0%	0.0%	0.0%	0.3%
United Kingdom	0.2%	0.0%	0.0%	0.0%	0.2%
Ireland	0.0%	0.0%	0.1%	0.3%	0.0%
Switzerland	0.0%	1.1%	0.0%	0.0%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%

Why do they choose the Canary Islands?

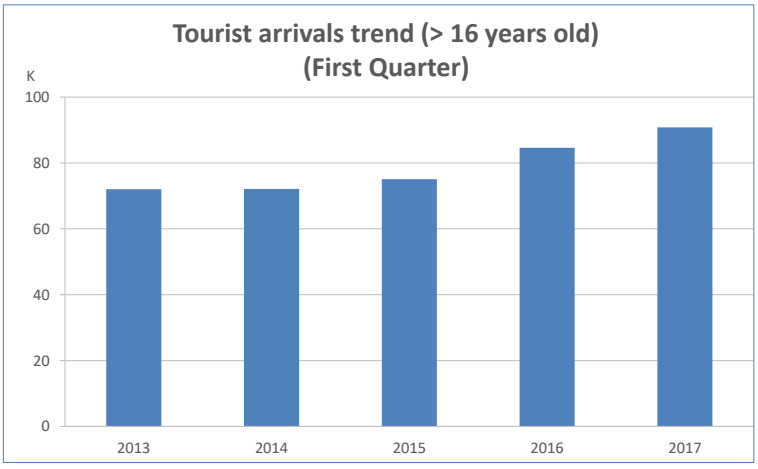
Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	97.0%	96.7%	95.5%	97.1%	95.7%
Tranquillity/rest/relaxation	43.7%	45.4%	43.3%	44.8%	41.5%
Scenery	24.5%	31.6%	33.6%	32.8%	32.1%
Beaches	23.9%	17.3%	18.0%	21.2%	17.5%
Security	5.4%	9.7%	9.4%	12.7%	15.2%
Active tourism	6.8%	6.2%	4.9%	9.3%	9.0%
Price	11.5%	8.6%	13.9%	12.3%	8.6%
Quality of the environment	9.4%	8.4%	11.2%	7.2%	7.8%
Suitable destination for children	3.9%	6.3%	5.4%	2.6%	7.4%
Visiting new places	8.3%	11.5%	10.3%	9.9%	7.2%
Golf	1.6%	1.6%	1.8%	1.1%	2.9%
Shopping	6.0%	7.8%	3.9%	5.2%	2.7%
Ease of travel	5.4%	3.5%	2.1%	1.7%	2.3%
Nautical activities	2.3%	0.5%	2.2%	2.0%	2.0%
Nightlife/fun	4.8%	1.2%	2.3%	0.8%	1.5%
Rural tourism	0.9%	0.8%	1.4%	1.2%	1.4%

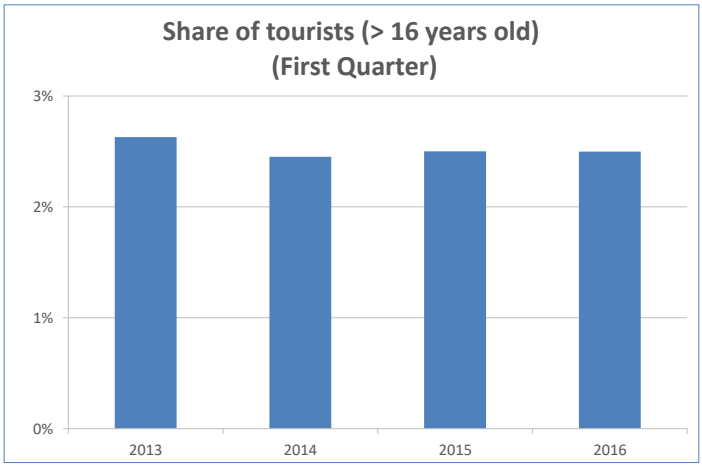
** Multi-choise question*

What did motivate them to come?

Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	70.1%	71.4%	69.4%	68.1%	71.3%
Recommendation by friends or relatives	31.5%	35.4%	36.1%	34.0%	32.0%
The Canary Islands television channel	0.5%	0.6%	0.2%	0.0%	0.0%
Other television or radio channels	1.8%	0.6%	0.4%	0.2%	0.4%
Information in the press/magazines/books	3.8%	3.3%	5.8%	3.3%	6.9%
Attendance at a tourism fair	0.9%	0.9%	1.6%	0.3%	0.3%
Tour Operator's brochure or catalogue	13.5%	14.8%	8.9%	10.9%	7.7%
Recommendation by Travel Agency	4.9%	8.9%	7.3%	10.3%	8.9%
Information obtained via the Internet	19.5%	13.4%	16.9%	19.3%	14.9%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	3.1%	3.6%	3.6%	3.2%	3.9%

** Multi-choise 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.