

Tourist profile trend (2017)

Belgium: Second Quarter

How many are they and how much do they spend?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tourist arrivals (> 16 years old)	55,668	61,345	72,479	83,624	83,131
Average daily expenditure (€)	142.69	144.25	133.57	135.30	145.71
. in their place of residence	105.06	110.62	99.62	100.00	109.68
. in the Canary Islands	37.63	33.63	33.96	35.30	36.03
Average length of stay	9.27	9.44	9.99	9.43	8.83
Turnover per tourist (€)	1,268	1,141	1,146	1,116	1,183
Total turnover (> 16 years old) (€m)	70.6	70.0	83.0	93.3	98.3
Share of total turnover	21.4%	21.4%	21.7%	21.3%	--
Share of total tourist	21.0%	22.2%	23.3%	23.5%	--

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

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Accommodation (**):	44.60	39.46	44.24	44.86	42.68
- Accommodation	39.25	35.98	39.42	36.61	38.42
- Additional accommodation expenses	5.35	3.48	4.82	8.25	4.26
Transport:	23.76	24.90	25.80	21.58	22.54
- Public transport	4.99	4.30	2.98	4.17	4.28
- Taxi	6.14	6.73	4.43	3.97	6.71
- Car rental	12.63	13.87	18.39	13.44	11.56
Food and drink:	279.07	123.26	114.84	127.44	129.59
- Food purchases at supermarkets	215.95	70.45	58.83	48.89	54.25
- Restaurants	63.12	52.81	56.01	78.55	75.34
Souvenirs:	62.83	61.58	68.47	72.68	55.68
Leisure:	39.47	24.53	26.96	21.46	29.36
- Organized excursions	15.79	13.60	13.86	11.10	17.78
- Leisure, amusement	2.21	3.40	2.07	2.83	2.46
- Trip to other islands	0.42	0.13	1.71	1.38	1.15
- Sporting activities	17.63	3.15	2.91	3.59	2.99
- Cultural activities	0.89	1.38	1.93	1.74	3.27
- Discos and disco-pubs	2.52	2.87	4.49	0.80	1.70
Others:	15.91	12.90	10.95	8.56	15.53
- Wellness	3.32	1.76	1.38	2.85	4.71
- Medical expenses	0.68	2.92	4.14	2.57	3.71
- Other expenses	11.91	8.22	5.43	3.14	7.11

How far in advance do they book their trip?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
The same day they leave	0.0%	0.9%	0.0%	0.0%	0.9%
Between 2 and 7 days	12.3%	8.8%	8.4%	8.3%	5.7%
Between 8 and 15 days	10.7%	9.0%	7.1%	5.1%	8.0%
Between 16 and 30 days	14.8%	15.7%	16.8%	9.7%	14.7%
Between 31 and 90 days	35.2%	28.4%	37.6%	40.0%	31.1%
More than 90 days	27.1%	37.3%	30.0%	36.9%	39.6%

What do they book at their place of residence?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight only	15.4%	13.1%	16.1%	15.2%	12.9%
Flight and accommodation (room only)	14.4%	12.6%	12.4%	14.6%	16.6%
Flight and accommodation (B&B)	3.9%	5.4%	3.4%	2.0%	3.6%
Flight and accommodation (half board)	29.4%	27.7%	28.9%	32.0%	29.2%
Flight and accommodation (full board)	3.6%	2.2%	2.3%	2.1%	5.9%
Flight and accommodation (all inclusive)	33.3%	38.9%	36.9%	34.1%	31.8%
% Tourists using low-cost airlines	38.8%	29.1%	29.4%	38.5%	29.9%
Other expenses in their place of residence:					
- Car rental	15.9%	11.9%	13.8%	12.7%	10.7%
- Sporting activities	4.8%	7.0%	3.1%	4.2%	3.7%
- Excursions	11.4%	5.5%	8.3%	9.6%	6.9%
- Trip to other islands	0.7%	0.0%	0.8%	0.6%	0.7%

How do they book?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Accommodation booking					
Tour Operator	36.8%	50.5%	55.9%	44.2%	44.5%
- Tour Operator's website	71.1%	75.0%	70.3%	70.0%	77.6%
Accommodation	18.6%	12.1%	14.6%	15.1%	13.0%
- Accommodation's website	88.1%	88.3%	65.5%	87.0%	82.1%
Travel agency (High street)	21.8%	18.5%	13.5%	16.7%	22.2%
Online Travel Agency (OTA)	14.3%	9.9%	8.7%	12.7%	11.1%
No need to book accommodation	8.5%	9.0%	7.4%	11.3%	9.3%

Flight booking

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tour Operator	44.4%	55.4%	60.2%	52.9%	55.3%
- Tour Operator's website	55.9%	69.7%	68.9%	67.9%	75.3%
Airline	30.1%	19.2%	23.0%	27.5%	20.9%
- Airline's website	100.0%	96.5%	96.4%	92.7%	89.2%
Travel agency (High street)	16.7%	18.9%	13.2%	13.4%	18.0%
Online Travel Agency (OTA)	8.8%	6.5%	3.7%	6.2%	5.8%

Where do they stay?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
5* Hotel	15.5%	12.8%	17.7%	9.3%	13.3%
4* Hotel	44.2%	50.8%	43.4%	48.6%	44.3%
1-2-3* Hotel	12.0%	9.7%	12.0%	9.5%	10.8%
Apartment	19.4%	17.7%	17.7%	24.5%	21.4%
Property (privately-owned, friends, family)	7.6%	8.4%	6.9%	6.4%	8.6%
Others	1.4%	0.5%	2.4%	1.8%	1.7%

Who are they?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Gender					
Percentage of men	47.2%	53.7%	49.4%	53.1%	49.9%
Percentage of women	52.8%	46.3%	50.6%	46.9%	50.1%

Age

Average age (tourists > 16 years old)	46.1	46.2	48.3	50.1	49.3
Standard deviation	13.8	13.7	15.4	14.2	14.6

Age range (> 16 years old)

16-24 years old	5.9%	3.4%	8.8%	5.1%	5.0%
25-30 years old	9.7%	10.8%	11.1%	9.6%	6.1%
31-45 years old	30.5%	39.0%	18.8%	17.6%	29.0%
46-60 years old	36.6%	31.7%	39.4%	45.2%	35.2%
Over 60 years old	17.4%	15.1%	21.9%	22.5%	24.7%

Occupation

Business owner or self-employed	16.7%	18.7%	13.8%	18.2%	18.0%
Upper/Middle management employee	43.2%	46.8%	34.2%	31.4%	41.8%
Auxiliary level employee	18.0%	14.7%	19.5%	19.0%	10.3%
Students	4.4%	2.6%	4.0%	4.8%	3.2%
Retired	16.6%	15.9%	24.7%	25.4%	24.4%
Unemployed / unpaid dom. work	1.0%	1.3%	3.9%	1.3%	2.4%

Annual household income level

€12,000 - €24,000	14.4%	11.6%	20.1%	14.8%	10.0%
€24,001 - €36,000	31.5%	23.5%	20.5%	24.0%	27.7%
€36,001 - €48,000	12.2%	19.7%	13.8%	22.4%	19.1%
€48,001 - €60,000	17.1%	19.1%	20.9%	13.6%	11.2%
€60,001 - €72,000	9.1%	7.3%	8.3%	8.3%	13.0%
€72,001 - €84,000	6.1%	6.6%	6.2%	7.4%	4.7%
More than €84,000	9.8%	12.1%	10.2%	9.5%	14.3%

(*) 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)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	5,628	6,246	7,474	7,154	8,554
- Fuerteventura	2,714	3,377	2,820	3,492	3,568
- Gran Canaria	14,625	14,813	19,195	23,790	24,321
- Tenerife	31,029	35,684	40,634	47,188	43,676
- La Palma	1,052	276	1,855	1,619	1,832

Share (%)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	10.2%	10.3%	10.4%	8.6%	10.4%
- Fuerteventura	4.9%	5.6%	3.9%	4.2%	4.4%
- Gran Canaria	26.6%	24.5%	26.7%	28.6%	29.7%
- Tenerife	56.4%	59.1%	56.5%	56.7%	53.3%
- La Palma	1.9%	0.5%	2.6%	1.9%	2.2%

Who do they come with?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Unaccompanied	7.8%	8.2%	10.5%	9.3%	6.4%
Only with partner	43.0%	44.7%	61.1%	56.7%	52.0%
Only with children (under the age of 13)	0.9%	1.7%	0.6%	1.4%	1.4%
Partner + children (under the age of 13)	13.4%	15.6%	4.4%	7.9%	8.4%
Other relatives	7.5%	6.1%	3.9%	3.0%	5.8%
Friends	6.3%	4.9%	8.9%	7.9%	5.6%
Work colleagues	0.4%	0.0%	0.0%	0.0%	0.6%
Other combinations ⁽¹⁾	20.6%	18.7%	10.6%	13.9%	19.8%

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

How do they rate the destination?



Impression of their stay	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Good or very good (% tourists)	94.7%	95.5%	92.1%	98.7%	94.3%
Average rating (scale 1-10)	8.93	8.93	8.84	9.13	9.00

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Repeat tourists	69.5%	80.8%	77.9%	73.1%	79.7%
In love (at least 10 previous visits)	15.2%	13.6%	20.5%	24.7%	17.6%

Where does the flight come from?



Ten main origin markets	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Belgium	81.5%	77.5%	92.1%	93.7%	74.2%
Netherlands	0.8%	14.1%	3.1%	0.5%	11.3%
Germany	6.5%	2.1%	1.7%	1.2%	3.7%
Spanish Mainland	5.9%	4.0%	2.9%	4.0%	3.3%
France	0.9%	0.7%	0.0%	0.2%	1.0%
United Kingdom	0.0%	0.4%	0.0%	0.0%	0.4%
Italy	0.0%	0.0%	0.0%	0.0%	0.4%
Ireland	0.0%	0.3%	0.0%	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	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Climate/sun	96.6%	93.4%	91.6%	95.5%	95.4%
Tranquillity/rest/relaxation	48.6%	45.7%	49.9%	48.1%	39.1%
Scenery	24.0%	26.8%	26.7%	25.3%	28.8%
Beaches	26.3%	23.4%	22.7%	17.4%	26.4%
Security	11.7%	11.5%	10.7%	14.6%	14.2%
Visiting new places	14.3%	16.1%	16.0%	12.6%	11.6%
Price	11.5%	9.6%	14.6%	10.5%	11.4%
Quality of the environment	7.3%	8.7%	7.0%	7.3%	10.2%
Shopping	7.2%	6.4%	4.8%	7.4%	5.5%
Active tourism	3.7%	5.3%	6.5%	5.0%	4.9%
Ease of travel	3.4%	1.9%	0.6%	2.4%	4.4%
Suitable destination for children	4.0%	9.6%	4.0%	3.8%	4.2%
Rural tourism	2.1%	1.3%	1.8%	3.5%	2.9%
Security against natural catastrophes	0.7%	0.4%	0.9%	1.2%	2.7%
Nightlife/fun	3.0%	1.1%	1.3%	2.3%	2.2%
Nautical activities	1.7%	1.4%	3.0%	1.4%	2.1%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Previous visits to the Canary Islands	58.3%	69.0%	60.4%	62.4%	64.9%
Recommendation by friends or relatives	41.4%	33.7%	31.9%	38.0%	32.6%
The Canary Islands television channel	0.0%	0.3%	0.4%	0.5%	0.0%
Other television or radio channels	1.5%	1.6%	0.7%	0.1%	0.5%
Information in the press/magazines/books	4.8%	3.8%	4.3%	2.0%	2.6%
Attendance at a tourism fair	1.6%	1.3%	0.5%	1.2%	0.8%
Tour Operator's brochure or catalogue	21.8%	11.5%	11.6%	13.7%	12.6%
Recommendation by Travel Agency	12.8%	8.7%	14.5%	7.6%	10.2%
Information obtained via the Internet	21.7%	20.4%	19.0%	15.9%	21.2%
Senior Tourism programme	0.0%	0.0%	0.0%	0.8%	0.4%
Others	1.4%	4.5%	4.1%	4.0%	5.6%

* 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.