

Tourist profile trend (2016)

Belgium: Third Quarter

How many are they and how much do they spend?



| | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|--------------------------------------|--------|--------|--------|--------|--------|
| Tourist arrivals (> 16 years old) | 64,575 | 64,902 | 68,680 | 79,051 | 92,959 |
| Average daily expenditure (€) | 133.82 | 133.31 | 125.29 | 140.30 | 139.47 |
| . in their place of residence | 97.13 | 100.42 | 92.80 | 107.93 | 107.80 |
| . in the Canary Islands | 36.69 | 32.89 | 32.49 | 32.37 | 31.67 |
| Average length of stay | 10.26 | 9.94 | 9.92 | 11.12 | 10.32 |
| Turnover per tourist (€) | 1,267 | 1,180 | 1,161 | 1,335 | 1,275 |
| Total turnover (> 16 years old) (€m) | 81.8 | 76.6 | 79.7 | 105 | 119 |
| Share of total turnover | 26.2% | 23.2% | 24.4% | 27.6% | 27.1% |
| Share of total tourist | 24.9% | 24.5% | 24.9% | 25.4% | 26.2% |

| Expenditure in the Canary Islands per tourist and trip (€) (**) | | | | | |
|---|--------|--------|--------|--------|--------|
| Accommodation (**): | 40.89 | 41.03 | 28.43 | 55.12 | 41.86 |
| - Accommodation | 36.21 | 34.32 | 24.04 | 36.89 | 28.33 |
| - Additional accommodation expenses | 4.68 | 6.71 | 4.39 | 18.23 | 13.53 |
| Transport: | 32.91 | 28.86 | 24.45 | 22.19 | 19.44 |
| - Public transport | 7.18 | 7.22 | 3.15 | 3.59 | 4.15 |
| - Taxi | 8.78 | 6.37 | 5.79 | 5.14 | 3.03 |
| - Car rental | 16.95 | 15.28 | 15.51 | 13.46 | 12.26 |
| Food and drink: | 138.14 | 113.78 | 128.15 | 138.65 | 108.43 |
| - Food purchases at supermarkets | 52.76 | 51.56 | 58.88 | 60.51 | 49.48 |
| - Restaurants | 85.38 | 62.22 | 69.27 | 78.14 | 58.95 |
| Souvenirs: | 67.79 | 71.11 | 71.51 | 77.99 | 84.04 |
| Leisure: | 53.11 | 40.06 | 46.66 | 38.95 | 36.88 |
| - Organized excursions | 25.78 | 18.21 | 27.64 | 20.74 | 23.74 |
| - Leisure, amusement | 6.94 | 5.74 | 6.90 | 4.34 | 4.30 |
| - Trip to other islands | 1.03 | 0.80 | 1.61 | 1.29 | 0.97 |
| - Sporting activities | 6.11 | 4.50 | 3.60 | 3.76 | 5.75 |
| - Cultural activities | 2.70 | 4.05 | 1.27 | 1.97 | 1.22 |
| - Discos and disco-pubs | 10.55 | 6.76 | 5.64 | 6.86 | 0.90 |
| Others: | 51.29 | 13.49 | 13.06 | 10.41 | 13.91 |
| - Wellness | 6.08 | 1.20 | 2.00 | 2.05 | 3.31 |
| - Medical expenses | 1.87 | 0.97 | 0.78 | 2.08 | 3.47 |
| - Other expenses | 43.34 | 11.32 | 10.28 | 6.28 | 7.13 |

How far in advance do they book their trip?



| | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|-------------------------|--------|--------|--------|--------|--------|
| The same day they leave | 0.4% | 0.9% | 1.2% | 0.0% | 0.6% |
| Between 2 and 7 days | 9.4% | 5.5% | 8.5% | 9.1% | 6.9% |
| Between 8 and 15 days | 13.1% | 11.2% | 10.7% | 7.9% | 9.0% |
| Between 16 and 30 days | 16.8% | 17.6% | 14.0% | 16.0% | 16.7% |
| Between 31 and 90 days | 19.8% | 27.4% | 25.4% | 25.6% | 21.1% |
| More than 90 days | 40.4% | 37.5% | 40.2% | 41.3% | 45.7% |

What do they book at their place of residence?



| | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|--|--------|--------|--------|--------|--------|
| Flight only | 13.4% | 13.4% | 16.2% | 13.2% | 10.4% |
| Flight and accommodation (room only) | 15.0% | 14.9% | 11.4% | 12.9% | 12.8% |
| Flight and accommodation (B&B) | 4.7% | 3.0% | 4.5% | 2.0% | 2.7% |
| Flight and accommodation (half board) | 30.6% | 25.1% | 21.6% | 27.2% | 21.8% |
| Flight and accommodation (full board) | 3.3% | 2.2% | 4.4% | 3.1% | 5.5% |
| Flight and accommodation (all inclusive) | 33.0% | 41.4% | 41.9% | 41.6% | 46.8% |
| % Tourists using low-cost airlines | 29.9% | 33.1% | 25.0% | 29.9% | 21.4% |
| Other expenses in their place of residence: | | | | | |
| - Car rental | 8.4% | 9.4% | 7.9% | 9.9% | 11.4% |
| - Sporting activities | 11.7% | 5.3% | 5.6% | 6.9% | 4.2% |
| - Excursions | 9.1% | 10.0% | 9.0% | 11.5% | 9.6% |
| - Trip to other islands | 0.0% | 0.0% | 0.1% | 1.0% | 0.3% |

How do they book?



| | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|--------------------------------------|--------|--------|--------|--------|--------|
| Accommodation booking | | | | | |
| Tour Operator | 41.6% | 47.4% | 53.6% | 48.1% | 47.1% |
| - Tour Operator's website | 81.1% | 70.5% | 74.5% | 65.4% | 85.1% |
| Accommodation | 16.2% | 11.5% | 11.0% | 9.3% | 11.2% |
| - Accommodation's website | 86.1% | 85.1% | 75.4% | 85.2% | 89.2% |
| Travel agency (High street) | 25.1% | 21.7% | 15.4% | 21.3% | 21.9% |
| Online Travel Agency (OTA) | 7.6% | 9.6% | 7.7% | 9.5% | 11.4% |
| No need to book accommodation | 9.6% | 9.7% | 12.2% | 11.7% | 8.3% |

| | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|------------------------------------|--------|--------|--------|--------|--------|
| Flight booking | | | | | |
| Tour Operator | 47.4% | 56.0% | 60.0% | 54.6% | 50.2% |
| - Tour Operator's website | 72.5% | 71.8% | 70.1% | 60.4% | 79.9% |
| Airline | 25.9% | 22.1% | 20.5% | 19.5% | 23.8% |
| - Airline's website | 98.5% | 95.8% | 90.8% | 95.9% | 93.8% |
| Travel agency (High street) | 22.2% | 16.7% | 13.3% | 18.2% | 21.4% |
| Online Travel Agency (OTA) | 4.5% | 5.2% | 6.2% | 7.6% | 4.6% |

Where do they stay?



| | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|---|--------|--------|--------|--------|--------|
| 5* Hotel | 12.7% | 8.2% | 11.4% | 13.5% | 8.9% |
| 4* Hotel | 44.3% | 48.5% | 46.6% | 50.0% | 53.1% |
| 1-2-3* Hotel | 16.7% | 11.9% | 13.3% | 10.0% | 7.5% |
| Apartment | 17.5% | 20.9% | 16.2% | 14.5% | 21.4% |
| Property (privately-owned, friends, family) | 8.1% | 8.1% | 11.3% | 10.8% | 7.0% |
| Others | 0.6% | 2.5% | 1.1% | 1.1% | 2.2% |

Who are they?



| | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|---------------------------------------|--------|--------|--------|--------|--------|
| Gender | | | | | |
| Percentage of men | 47.1% | 42.9% | 55.9% | 51.9% | 52.2% |
| Percentage of women | 52.9% | 57.1% | 44.1% | 48.1% | 47.8% |
| Age | | | | | |
| Average age (tourists > 16 years old) | 38.9 | 41.6 | 40.0 | 42.1 | 44.5 |
| Standard deviation | 13.0 | 13.8 | 13.2 | 13.9 | 15.8 |
| Age range (> 16 years old) | | | | | |
| 16-24 years old | 15.5% | 16.5% | 16.4% | 13.5% | 9.8% |
| 25-30 years old | 19.1% | 11.8% | 13.1% | 13.4% | 15.2% |
| 31-45 years old | 32.5% | 25.8% | 33.1% | 30.8% | 27.1% |
| 46-60 years old | 27.1% | 39.7% | 31.0% | 32.2% | 33.0% |
| Over 60 years old | 5.8% | 6.2% | 6.4% | 10.1% | 14.9% |
| Occupation | | | | | |
| Business owner or self-employed | 17.9% | 15.1% | 17.2% | 19.1% | 14.1% |
| Upper/Middle management employee | 38.9% | 46.1% | 41.5% | 47.9% | 44.9% |
| Auxiliary level employee | 26.3% | 17.3% | 20.2% | 14.4% | 19.8% |
| Students | 9.2% | 11.2% | 11.7% | 8.4% | 6.7% |
| Retired | 5.0% | 5.7% | 6.7% | 8.0% | 13.6% |
| Unemployed / unpaid dom. work | 2.6% | 4.6% | 2.6% | 2.0% | 0.9% |
| Annual household income level | | | | | |
| €12,000 - €24,000 | 21.3% | 18.3% | 18.8% | 16.6% | 14.7% |
| €24,001 - €36,000 | 28.0% | 22.7% | 22.7% | 26.1% | 18.6% |
| €36,001 - €48,000 | 17.8% | 27.8% | 19.8% | 25.7% | 24.7% |
| €48,001 - €60,000 | 14.3% | 11.2% | 16.1% | 11.2% | 23.2% |
| €60,001 - €72,000 | 7.6% | 7.8% | 6.8% | 5.9% | 8.1% |
| €72,001 - €84,000 | 3.4% | 3.5% | 4.4% | 4.7% | 2.7% |
| More than €84,000 | 7.6% | 8.8% | 11.3% | 9.8% | 8.0% |

(*) 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: Third Quarter

Which island do they choose?



| Tourists (> 16 years old) | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|---------------------------|--------|--------|--------|--------|--------|
| - Lanzarote | 5,676 | 6,335 | 7,336 | 8,594 | 9,252 |
| - Fuerteventura | 3,265 | 4,177 | 3,138 | 3,883 | 3,741 |
| - Gran Canaria | 19,933 | 19,939 | 20,310 | 23,197 | 30,536 |
| - Tenerife | 34,451 | 32,889 | 35,991 | 41,752 | 46,431 |
| - La Palma | 969 | 1,323 | 984 | 1,625 | 1,973 |

| Share (%) | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|-----------------|--------|--------|--------|--------|--------|
| - Lanzarote | 8.8% | 9.8% | 10.8% | 10.9% | 10.1% |
| - Fuerteventura | 5.1% | 6.5% | 4.6% | 4.9% | 4.1% |
| - Gran Canaria | 31.0% | 30.8% | 30.0% | 29.3% | 33.2% |
| - Tenerife | 53.6% | 50.9% | 53.1% | 52.8% | 50.5% |
| - La Palma | 1.5% | 2.0% | 1.5% | 2.1% | 2.1% |

Who do they come with?



| | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|--|--------|--------|--------|--------|--------|
| Unaccompanied | 4.7% | 5.5% | 8.6% | 8.6% | 4.4% |
| Only with partner | 43.1% | 46.9% | 40.2% | 43.7% | 50.1% |
| Only with children (under the age of 13) | 2.2% | 2.1% | 1.6% | 3.9% | 1.8% |
| Partner + children (under the age of 13) | 17.5% | 13.7% | 19.9% | 13.3% | 13.9% |
| Other relatives | 4.3% | 5.6% | 3.8% | 5.1% | 3.5% |
| Friends | 8.4% | 5.2% | 5.3% | 3.0% | 4.2% |
| Work colleagues | 0.2% | 0.0% | 0.3% | 0.0% | 0.0% |
| Other combinations ⁽¹⁾ | 19.7% | 21.1% | 20.3% | 22.4% | 22.2% |

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

How do they rate the destination?



| Impression of their stay | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|--------------------------------|--------|--------|--------|--------|--------|
| Good or very good (% tourists) | 94.9% | 94.2% | 94.6% | 93.7% | 94.2% |
| Average rating (scale 1-10) | 8.93 | 8.83 | 8.88 | 8.80 | 8.90 |

How many are loyal to the destination?

| Repeat tourists of the Canary Islands | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|---------------------------------------|--------|--------|--------|--------|--------|
| Repeat tourists | 64.8% | 64.0% | 61.0% | 68.6% | 66.3% |
| In love (at least 10 previous visits) | 9.6% | 10.9% | 10.2% | 13.2% | 9.8% |

Where does the flight come from?



| Ten main origin countries | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|---------------------------|--------|--------|--------|--------|--------|
| Belgium | 92.5% | 94.3% | 87.1% | 86.4% | 90.6% |
| Spanish Mainland | 0.5% | 1.2% | 2.2% | 2.6% | 3.2% |
| Netherlands | 2.7% | 0.9% | 4.8% | 4.6% | 1.8% |
| Germany | 1.4% | 2.5% | 2.2% | 3.2% | 1.7% |
| United Kingdom | 0.0% | 0.0% | 0.0% | 0.4% | 0.4% |
| France | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% |
| Sweden | 0.0% | 0.0% | 0.4% | 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% |
| Finland | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Why do they choose the Canary Islands?



| Aspects influencing the choice | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|-----------------------------------|--------|--------|--------|--------|--------|
| Climate/sun | 95.8% | 92.3% | 93.2% | 93.2% | 97.5% |
| Tranquillity/rest/relaxation | 52.8% | 44.9% | 40.4% | 41.7% | 41.9% |
| Scenery | 17.5% | 23.5% | 32.2% | 22.3% | 27.0% |
| Beaches | 25.6% | 25.3% | 30.9% | 24.0% | 24.5% |
| Visiting new places | 21.4% | 15.1% | 17.2% | 15.7% | 19.0% |
| Security | 4.7% | 7.9% | 5.2% | 15.4% | 16.9% |
| Price | 14.9% | 15.2% | 14.3% | 12.0% | 10.3% |
| Shopping | 7.2% | 7.5% | 7.3% | 6.5% | 8.3% |
| Quality of the environment | 3.9% | 3.3% | 3.9% | 7.9% | 8.1% |
| Nautical activities | 4.2% | 5.2% | 5.5% | 3.3% | 5.1% |
| Theme parks | 2.3% | 5.6% | 2.2% | 2.8% | 4.2% |
| Active tourism | 4.0% | 5.5% | 6.5% | 5.9% | 4.1% |
| Ease of travel | 1.1% | 0.3% | 0.9% | 0.3% | 4.0% |
| Suitable destination for children | 5.8% | 6.4% | 7.3% | 8.7% | 4.0% |
| Nightlife/fun | 3.1% | 2.4% | 4.6% | 2.8% | 3.8% |
| Culture | 2.9% | 1.5% | 2.1% | 4.4% | 2.0% |

* Multi-choice question

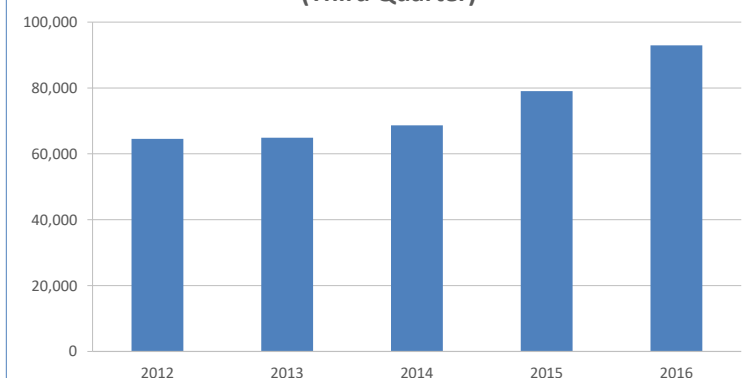
What did motivate them to come?



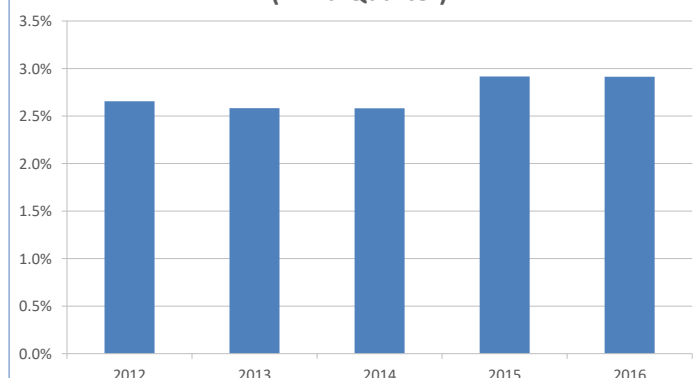
| Aspects motivating the choice | 2012Q3 | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 |
|--|--------|--------|--------|--------|--------|
| Previous visits to the Canary Islands | 55.8% | 52.5% | 48.7% | 58.4% | 49.6% |
| Recommendation by friends or relatives | 43.1% | 33.8% | 40.4% | 35.9% | 38.1% |
| The Canary Islands television channel | 1.2% | 0.9% | 0.2% | 1.5% | 0.2% |
| Other television or radio channels | 1.1% | 1.4% | 0.9% | 0.4% | 0.0% |
| Information in the press/magazines/books | 5.4% | 3.7% | 4.1% | 7.3% | 3.1% |
| Attendance at a tourism fair | 1.8% | 1.2% | 2.1% | 0.7% | 1.0% |
| Tour Operator's brochure or catalogue | 16.0% | 22.4% | 20.5% | 16.9% | 16.4% |
| Recommendation by Travel Agency | 14.4% | 14.8% | 13.1% | 15.4% | 14.1% |
| Information obtained via the Internet | 18.2% | 19.8% | 22.9% | 24.6% | 27.1% |
| Senior Tourism programme | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Others | 4.2% | 5.5% | 3.8% | 4.2% | 4.7% |

* Multi-choice question

Tourist arrivals trend (> 16 years old)
(Third Quarter)



Share of tourists (> 16 years old)
(Third Quarter)



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.