

Tourist profile trend (2017)

Belgium: Third Quarter

How many are they and how much do they spend?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	64,902	68,680	79,051	92,959	96,870
Average daily expenditure (€)	133.31	125.29	140.30	139.47	140.72
. in their place of residence	100.42	92.80	107.93	107.80	103.83
. in the Canary Islands	32.89	32.49	32.37	31.67	36.89
Average length of stay	9.94	9.92	11.12	10.32	9.74
Turnover per tourist (€)	1,180	1,161	1,335	1,275	1,209
Total turnover (> 16 years old) (€m)	77	80	105	119	117
Share of total turnover	23.2%	24.4%	27.6%	27.1%	--
Share of total tourist	24.5%	24.9%	25.4%	26.2%	--

Expenditure in the Canary Islands per tourist and trip (€) (**)					
Accommodation (**):	41.03	28.43	55.12	41.86	60.82
- Accommodation	34.32	24.04	36.89	28.33	51.89
- Additional accommodation expenses	6.71	4.39	18.23	13.53	8.93
Transport:	28.86	24.45	22.19	19.44	27.79
- Public transport	7.22	3.15	3.59	4.15	6.69
- Taxi	6.37	5.79	5.14	3.03	6.45
- Car rental	15.28	15.51	13.46	12.26	14.64
Food and drink:	113.78	128.15	138.65	108.43	130.65
- Food purchases at supermarkets	51.56	58.88	60.51	49.48	61.65
- Restaurants	62.22	69.27	78.14	58.95	69.00
Souvenirs:	71.11	71.51	77.99	84.04	65.23
Leisure:	40.06	46.66	38.95	36.88	49.99
- Organized excursions	18.21	27.64	20.74	23.74	26.58
- Leisure, amusement	5.74	6.90	4.34	4.30	6.98
- Trip to other islands	0.80	1.61	1.29	0.97	1.46
- Sporting activities	4.50	3.60	3.76	5.75	7.43
- Cultural activities	4.05	1.27	1.97	1.22	1.92
- Discos and disco-pubs	6.76	5.64	6.86	0.90	5.62
Others:	13.49	13.06	10.41	13.91	14.15
- Wellness	1.20	2.00	2.05	3.31	3.02
- Medical expenses	0.97	0.78	2.08	3.47	1.51
- Other expenses	11.32	10.28	6.28	7.13	9.62

How far in advance do they book their trip?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.9%	1.2%	0.0%	0.6%	0.4%
Between 2 and 7 days	5.5%	8.5%	9.1%	6.9%	6.5%
Between 8 and 15 days	11.2%	10.7%	7.9%	9.0%	16.9%
Between 16 and 30 days	17.6%	14.0%	16.0%	16.7%	16.0%
Between 31 and 90 days	27.4%	25.4%	25.6%	21.1%	25.1%
More than 90 days	37.5%	40.2%	41.3%	45.7%	35.2%

What do they book at their place of residence?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	13.4%	16.2%	13.2%	10.4%	18.5%
Flight and accommodation (room only)	14.9%	11.4%	12.9%	12.8%	16.4%
Flight and accommodation (B&B)	3.0%	4.5%	2.0%	2.7%	3.1%
Flight and accommodation (half board)	25.1%	21.6%	27.2%	21.8%	22.6%
Flight and accommodation (full board)	2.2%	4.4%	3.1%	5.5%	0.1%
Flight and accommodation (all inclusive)	41.4%	41.9%	41.6%	46.8%	39.4%
% Tourists using low-cost airlines	33.1%	25.0%	29.9%	21.4%	33.4%
Other expenses in their place of residence:					
- Car rental	9.4%	7.9%	9.9%	11.4%	7.8%
- Sporting activities	5.3%	5.6%	6.9%	4.2%	6.5%
- Excursions	10.0%	9.0%	11.5%	9.6%	5.5%
- Trip to other islands	0.0%	0.1%	1.0%	0.3%	0.7%

How do they book?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation booking					
Tour Operator	47.4%	53.6%	48.1%	47.1%	47.2%
- Tour Operator's website	70.5%	74.5%	65.4%	85.1%	76.4%
Accommodation	11.5%	11.0%	9.3%	11.2%	10.9%
- Accommodation's website	85.1%	75.4%	85.2%	89.2%	81.1%
Travel agency (High street)	21.7%	15.4%	21.3%	21.9%	17.4%
Online Travel Agency (OTA)	9.6%	7.7%	9.5%	11.4%	11.9%
No need to book accommodation	9.7%	12.2%	11.7%	8.3%	12.5%

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight booking					
Tour Operator	56.0%	60.0%	54.6%	50.2%	60.9%
- Tour Operator's website	71.8%	70.1%	60.4%	79.9%	70.0%
Airline	22.1%	20.5%	19.5%	23.8%	19.4%
- Airline's website	95.8%	90.8%	95.9%	93.8%	95.5%
Travel agency (High street)	16.7%	13.3%	18.2%	21.4%	12.0%
Online Travel Agency (OTA)	5.2%	6.2%	7.6%	4.6%	7.7%

Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	8.2%	11.4%	13.5%	8.9%	9.4%
4* Hotel	48.5%	46.6%	50.0%	53.1%	42.4%
1-2-3* Hotel	11.9%	13.3%	10.0%	7.5%	11.4%
Apartment	20.9%	16.2%	14.5%	21.4%	26.6%
Property (privately-owned, friends, family)	8.1%	11.3%	10.8%	7.0%	8.7%
Others	2.5%	1.1%	1.1%	2.2%	1.5%

Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Gender					
Percentage of men	42.9%	55.9%	51.9%	52.2%	52.2%
Percentage of women	57.1%	44.1%	48.1%	47.8%	47.8%

Age					
Average age (tourists > 16 years old)	41.6	40.0	42.1	44.5	42.2
Standard deviation	13.8	13.2	13.9	15.8	15.2

Age range (> 16 years old)					
16-24 years old	16.5%	16.4%	13.5%	9.8%	15.2%
25-30 years old	11.8%	13.1%	13.4%	15.2%	14.8%
31-45 years old	25.8%	33.1%	30.8%	27.1%	26.1%
46-60 years old	39.7%	31.0%	32.2%	33.0%	30.9%
Over 60 years old	6.2%	6.4%	10.1%	14.9%	12.9%

Occupation					
Business owner or self-employed	15.1%	17.2%	19.1%	14.1%	15.7%
Upper/Middle management employee	46.1%	41.5%	47.9%	44.9%	38.8%
Auxiliary level employee	17.3%	20.2%	14.4%	19.8%	27.0%
Students	11.2%	11.7%	8.4%	6.7%	8.7%
Retired	5.7%	6.7%	8.0%	13.6%	8.7%
Unemployed / unpaid dom. work	4.6%	2.6%	2.0%	0.9%	1.1%

Annual household income level					
€12,000 - €24,000	18.3%	18.8%	16.6%	14.7%	15.3%
€24,001 - €36,000	22.7%	22.7%	26.1%	18.6%	28.1%
€36,001 - €48,000	27.8%	19.8%	25.7%	24.7%	16.9%
€48,001 - €60,000	11.2%	16.1%	11.2%	23.2%	19.0%
€60,001 - €72,000	7.8%	6.8%	5.9%	8.1%	6.8%
€72,001 - €84,000	3.5%	4.4%	4.7%	2.7%	3.7%
More than €84,000	8.8%	11.3%	9.8%	8.0%	10.3%

(*) 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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Belgium: Third Quarter

Which island do they choose?



Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	6,335	7,336	8,594	9,252	12,849
- Fuerteventura	4,177	3,138	3,883	3,741	3,077
- Gran Canaria	19,939	20,310	23,197	30,536	30,370
- Tenerife	32,889	35,991	41,752	46,431	48,464
- La Palma	1,323	984	1,625	1,973	2,110

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	9.8%	10.8%	10.9%	10.1%	13.3%
- Fuerteventura	6.5%	4.6%	4.9%	4.1%	3.2%
- Gran Canaria	30.8%	30.0%	29.3%	33.2%	31.4%
- Tenerife	50.9%	53.1%	52.8%	50.5%	50.0%
- La Palma	2.0%	1.5%	2.1%	2.1%	2.2%

Who do they come with?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	5.5%	8.6%	8.6%	4.4%	8.8%
Only with partner	46.9%	40.2%	43.7%	50.1%	46.2%
Only with children (under the age of 13)	2.1%	1.6%	3.9%	1.8%	3.4%
Partner + children (under the age of 13)	13.7%	19.9%	13.3%	13.9%	12.3%
Other relatives	5.6%	3.8%	5.1%	3.5%	3.6%
Friends	5.2%	5.3%	3.0%	4.2%	3.6%
Work colleagues	0.0%	0.3%	0.0%	0.0%	0.8%
Other combinations ⁽¹⁾	21.1%	20.3%	22.4%	22.2%	21.3%

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

How do they rate the destination?



Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	94.2%	94.6%	93.7%	94.2%	96.5%
Average rating (scale 1-10)	8.83	8.88	8.80	8.90	8.85

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	64.0%	61.0%	68.6%	66.3%	64.8%
In love (at least 10 previous visits)	10.9%	10.2%	13.2%	9.8%	12.5%

Where does the flight come from?



Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Belgium	94.3%	87.1%	86.4%	90.6%	85.1%
Netherlands	0.9%	4.8%	4.6%	1.8%	5.8%
Germany	2.5%	2.2%	3.2%	1.7%	5.1%
France	0.0%	0.8%	0.0%	0.0%	1.4%
Spanish Mainland	1.2%	2.2%	2.6%	3.2%	0.4%
United Kingdom	0.0%	0.0%	0.4%	0.4%	0.4%
Sweden	0.0%	0.4%	0.0%	0.0%	0.0%
Ireland	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%
Norway	0.0%	0.0%	0.0%	0.0%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	92.3%	93.2%	93.2%	97.5%	94.2%
Tranquillity/rest/relaxation	44.9%	40.4%	41.7%	41.9%	39.3%
Beaches	25.3%	30.9%	24.0%	24.5%	28.4%
Scenery	23.5%	32.2%	22.3%	27.0%	27.4%
Visiting new places	15.1%	17.2%	15.7%	19.0%	17.4%
Security	7.9%	5.2%	15.4%	16.9%	13.6%
Price	15.2%	14.3%	12.0%	10.3%	12.6%
Shopping	7.5%	7.3%	6.5%	8.3%	7.5%
Active tourism	5.5%	6.5%	5.9%	4.1%	5.3%
Nightlife/fun	2.4%	4.6%	2.8%	3.8%	5.2%
Suitable destination for children	6.4%	7.3%	8.7%	4.0%	5.1%
Nautical activities	5.2%	5.5%	3.3%	5.1%	4.4%
Theme parks	5.6%	2.2%	2.8%	4.2%	3.1%
Culture	1.5%	2.1%	4.4%	2.0%	2.6%
Quality of the environment	3.3%	3.9%	7.9%	8.1%	2.6%
Ease of travel	0.3%	0.9%	0.3%	4.0%	2.3%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	52.5%	48.7%	58.4%	49.6%	52.8%
Recommendation by friends or relatives	33.8%	40.4%	35.9%	38.1%	43.7%
The Canary Islands television channel	0.9%	0.2%	1.5%	0.2%	0.3%
Other television or radio channels	1.4%	0.9%	0.4%	0.0%	0.9%
Information in the press/magazines/books	3.7%	4.1%	7.3%	3.1%	2.9%
Attendance at a tourism fair	1.2%	2.1%	0.7%	1.0%	1.0%
Tour Operator's brochure or catalogue	22.4%	20.5%	16.9%	16.4%	16.6%
Recommendation by Travel Agency	14.8%	13.1%	15.4%	14.1%	12.8%
Information obtained via the Internet	19.8%	22.9%	24.6%	27.1%	24.0%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	5.5%	3.8%	4.2%	4.7%	4.1%

* 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.