

Tourist profile by islands (2016)

Belgian market



How many are they and how much do they spend?

| | Lanzarote | Fuerteventura | Gran Canaria | Tenerife | La Palma |
|--|-----------|---------------|--------------|----------|----------|
| Tourist arrivals (> 16 years old) | 35,148 | 15,239 | 100,151 | 192,249 | 8,952 |
| Average daily expenditure (€) | 147.68 | 142.76 | 149.53 | 144.63 | 118.89 |
| - in their place of residence | 113.82 | 106.47 | 117.54 | 106.22 | 84.51 |
| - in the Canary Islands | 33.85 | 36.29 | 31.99 | 38.41 | 34.38 |
| Average length of stay | 8.50 | 9.88 | 9.89 | 10.27 | 10.60 |
| Turnover per tourist (€) | 1,198 | 1,181 | 1,307 | 1,209 | 1,089 |
| Total turnover (> 16 years old) (€m) | 42.1 | 18.0 | 130.9 | 232 | 9.75 |
| Belgian turnover: share by islands | 9.7% | 4.2% | 30.2% | 53.7% | 2.2% |
| Belgian tourist arrivals: share by islands | 10.0% | 4.3% | 28.5% | 54.7% | 2.5% |

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

| | Lanzarote | Fuerteventura | Gran Canaria | Tenerife | La Palma |
|-------------------------------------|-----------|---------------|--------------|----------|----------|
| Accommodation (**): | 60.02 | 27.53 | 43.63 | 54.40 | 51.08 |
| - Accommodation | 57.93 | 24.78 | 34.22 | 42.35 | 47.77 |
| - Additional accommodation expenses | 2.09 | 2.75 | 9.41 | 12.05 | 3.31 |
| Transport: | 32.06 | 24.92 | 19.93 | 22.30 | 66.78 |
| - Public transport | 3.66 | 4.62 | 4.52 | 5.36 | 13.33 |
| - Taxi | 4.82 | 4.17 | 6.62 | 4.48 | 3.52 |
| - Car rental | 23.58 | 16.12 | 8.79 | 12.46 | 49.93 |
| Food and drink: | 100.92 | 126.43 | 112.92 | 152.97 | 157.85 |
| - Food purchases at supermarkets | 40.83 | 32.27 | 46.80 | 62.37 | 77.88 |
| - Restaurants | 60.08 | 94.16 | 66.12 | 90.60 | 79.97 |
| Souvenirs: | 30.71 | 50.38 | 74.13 | 75.42 | 42.31 |
| Leisure: | 45.95 | 43.99 | 24.78 | 24.09 | 29.15 |
| - Organized excursions | 18.93 | 27.64 | 11.53 | 14.84 | 19.09 |
| - Leisure, amusement | 6.68 | 0.90 | 2.86 | 2.98 | 2.79 |
| - Trip to other islands | 1.05 | 2.15 | 1.27 | 0.56 | 0.03 |
| - Sporting activities | 12.87 | 5.59 | 3.67 | 3.59 | 1.44 |
| - Cultural activities | 6.38 | 1.40 | 0.47 | 1.31 | 5.81 |
| - Discos and disco-pubs | 0.05 | 6.31 | 4.98 | 0.82 | 0.00 |
| Others: | 10.08 | 28.98 | 12.32 | 13.12 | 25.51 |
| - Wellness | 2.77 | 2.54 | 3.34 | 2.65 | 4.26 |
| - Medical expenses | 0.82 | 18.12 | 1.55 | 3.03 | 1.11 |
| - Other expenses | 6.49 | 8.32 | 7.42 | 7.44 | 20.14 |

How far in advance do they book their trip?

| | LZ | FUE | GC | TFE | LP |
|-------------------------|-------|-------|-------|-------|-------|
| The same day they leave | 0.0% | 0.0% | 1.0% | 0.2% | 0.0% |
| Between 2 and 7 days | 5.2% | 8.2% | 7.9% | 5.2% | 9.7% |
| Between 8 and 15 days | 4.4% | 14.9% | 8.2% | 6.4% | 10.2% |
| Between 16 and 30 days | 10.5% | 27.3% | 16.3% | 13.5% | 12.9% |
| Between 31 and 90 days | 43.1% | 25.7% | 30.6% | 32.4% | 42.9% |
| More than 90 days | 36.7% | 24.0% | 36.0% | 42.2% | 24.3% |

What do they book at their place of residence?

| | LZ | FUE | GC | TFE | LP |
|--|-------|-------|-------|-------|-------|
| Flight only | 3.8% | 12.0% | 8.6% | 16.5% | 18.6% |
| Flight & accommodation (room only) | 16.0% | 17.1% | 11.2% | 17.4% | 16.3% |
| Flight & accommodation (B&B) | 5.3% | 3.9% | 4.7% | 4.0% | 8.3% |
| Flight & accommodation (half board) | 21.3% | 18.9% | 28.9% | 29.5% | 29.6% |
| Flight & accommodation (full board) | 2.8% | 2.8% | 6.5% | 3.9% | 2.3% |
| Flight & accommodation (all inclusive) | 50.7% | 45.3% | 40.1% | 28.7% | 24.8% |
| % Tourists using low-cost airlines | 51.6% | 44.9% | 22.0% | 31.7% | 29.6% |
| Other expenses in their place of residence: | | | | | |
| - Car rental | 21.3% | 14.0% | 7.8% | 12.3% | 28.3% |
| - Sporting activities | 11.5% | 11.7% | 1.3% | 4.1% | 2.9% |
| - Excursions | 16.7% | 11.8% | 5.0% | 8.2% | 6.8% |
| - Trip to other islands | 1.8% | 0.6% | 0.5% | 0.2% | 0.0% |

(*) 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.



How do they book?

| | LZ | FUE | GC | TFE | LP |
|--------------------------------------|-------|-------|-------|-------|-------|
| Accommodation booking | | | | | |
| Tour Operator | 45.2% | 46.9% | 46.9% | 42.5% | 58.2% |
| - Tour Operator's website | 72.4% | 68.8% | 73.2% | 69.9% | 92.2% |
| Accommodation | 17.4% | 18.3% | 14.4% | 16.0% | 8.9% |
| - Accommodation's website | 84.4% | 94.1% | 88.5% | 83.3% | 93.4% |
| Travel agency (High street) | 12.8% | 10.2% | 21.5% | 20.6% | 11.5% |
| Online Travel Agency (OTA) | 23.1% | 17.4% | 12.7% | 9.1% | 8.0% |
| No need to book accommodation | 1.5% | 7.2% | 4.5% | 11.8% | 13.4% |

| | LZ | FUE | GC | TFE | LP |
|------------------------------------|-------|--------|-------|-------|--------|
| Flight booking | | | | | |
| Tour Operator | 46.6% | 52.8% | 56.1% | 53.3% | 65.2% |
| - Tour Operator's website | 74.5% | 76.4% | 63.2% | 70.9% | 87.1% |
| Airline | 31.7% | 22.1% | 22.0% | 24.3% | 16.8% |
| - Airline's website | 98.0% | 100.0% | 94.5% | 95.4% | 100.0% |
| Travel agency (High street) | 13.1% | 12.9% | 17.4% | 16.2% | 14.1% |
| Online Travel Agency (OTA) | 8.5% | 12.2% | 4.4% | 6.2% | 3.9% |

Where do they stay?

| | LZ | FUE | GC | TFE | LP |
|---|-------|-------|-------|-------|-------|
| 5* Hotel | 6.7% | 4.7% | 13.6% | 9.3% | 0.0% |
| 4* Hotel | 51.4% | 59.8% | 48.2% | 50.8% | 41.3% |
| 1-2-3* Hotel | 13.5% | 14.2% | 15.2% | 6.4% | 12.8% |
| Apartment | 27.4% | 13.7% | 19.1% | 23.1% | 29.5% |
| Property (privately-owned, friends, family) | 0.5% | 4.0% | 2.9% | 8.5% | 9.8% |
| Others | 0.4% | 3.5% | 1.1% | 1.9% | 6.6% |

Who are they?

| | LZ | FUE | GC | TFE | LP |
|---------------------|-------|-------|-------|-------|-------|
| Gender | | | | | |
| Percentage of men | 53.3% | 47.4% | 50.5% | 53.5% | 54.0% |
| Percentage of women | 46.7% | 52.6% | 49.5% | 46.5% | 46.0% |

| | LZ | FUE | GC | TFE | LP |
|---------------------------------------|------|------|------|------|------|
| Age | | | | | |
| Average age (tourists > 16 years old) | 47.4 | 45.1 | 51.8 | 48.3 | 49.3 |
| Standard deviation | 13.6 | 14.3 | 16.1 | 14.7 | 13.2 |

| | LZ | FUE | GC | TFE | LP |
|--------------------------------------|-------|-------|-------|-------|-------|
| Age range (> 16 years old) | | | | | |
| 16-24 years old | 3.3% | 3.9% | 4.3% | 7.5% | 3.0% |
| 25-30 years old | 12.0% | 17.8% | 7.5% | 9.5% | 7.8% |
| 31-45 years old | 29.9% | 31.5% | 23.0% | 23.0% | 26.8% |
| 46-60 years old | 35.8% | 34.5% | 33.9% | 40.5% | 40.4% |
| Over 60 years old | 19.1% | 12.3% | 31.3% | 19.5% | 21.9% |

| | LZ | FUE | GC | TFE | LP |
|----------------------------------|-------|-------|-------|-------|-------|
| Occupation | | | | | |
| Business owner or self-employed | 20.7% | 21.7% | 16.2% | 19.4% | 15.0% |
| Upper/Middle management employee | 50.3% | 50.9% | 31.5% | 37.6% | 43.2% |
| Auxiliary level employee | 7.3% | 10.2% | 17.6% | 16.4% | 16.3% |
| Students | 2.7% | 3.4% | 3.5% | 4.7% | 1.5% |
| Retired | 18.0% | 13.8% | 30.4% | 19.9% | 21.0% |
| Unemployed / unpaid dom. work | 1.0% | 0.0% | 0.8% | 2.0% | 2.9% |

| | LZ | FUE | GC | TFE | LP |
|--------------------------------------|-------|-------|-------|-------|-------|
| Annual household income level | | | | | |
| €12,000 - €24,000 | 11.0% | 5.8% | 14.0% | 15.8% | 16.9% |
| €24,001 - €36,000 | 15.2% | 22.1% | 23.8% | 20.4% | 26.0% |
| €36,001 - €48,000 | 17.6% | 25.3% | 21.6% | 20.5% | 19.4% |
| €48,001 - €60,000 | 21.9% | 18.7% | 14.8% | 16.5% | 9.6% |
| €60,001 - €72,000 | 15.5% | 14.9% | 8.1% | 9.5% | 11.1% |
| €72,001 - €84,000 | 7.3% | 4.4% | 6.1% | 3.8% | 5.5% |
| More than €84,000 | 11.3% | 8.9% | 11.6% | 13.6% | 11.5% |



Tourist profile by islands (2016)

Belgian market



Which island do they choose?

| Tourists (> 16 years old) | LZ | FUE | GC | TFE | LP |
|---------------------------|--------|--------|---------|---------|-------|
| - 2012 | 23,329 | 12,092 | 71,530 | 145,174 | 5,011 |
| - 2013 | 23,717 | 22,924 | 71,013 | 139,978 | 5,781 |
| - 2014 | 25,736 | 11,426 | 74,078 | 158,374 | 3,543 |
| - 2015 | 31,990 | 13,324 | 82,320 | 174,755 | 6,807 |
| - 2016 | 35,148 | 15,239 | 100,151 | 192,249 | 8,952 |

| Share (%) | LZ | FUE | GC | TFE | LP |
|-----------|-------|------|-------|-------|------|
| - 2012 | 9.1% | 4.7% | 27.8% | 56.5% | 1.9% |
| - 2013 | 9.0% | 8.7% | 27.0% | 53.1% | 2.2% |
| - 2014 | 9.4% | 4.2% | 27.1% | 58.0% | 1.3% |
| - 2015 | 10.3% | 4.3% | 26.6% | 56.5% | 2.2% |
| - 2016 | 10.0% | 4.3% | 28.5% | 54.7% | 2.5% |

Who do they come with?



| | LZ | FUE | GC | TFE | LP |
|--|-------|-------|-------|-------|-------|
| Unaccompanied | 6.4% | 13.9% | 8.7% | 6.8% | 15.3% |
| Only with partner | 54.2% | 52.7% | 54.3% | 49.9% | 58.1% |
| Only with children (under the age of 13) | 0.0% | 0.0% | 1.7% | 0.8% | 1.8% |
| Partner + children (under the age of 13) | 19.6% | 11.4% | 9.2% | 9.5% | 6.5% |
| Other relatives | 3.2% | 4.4% | 3.5% | 3.8% | 4.2% |
| Friends | 4.2% | 10.7% | 4.5% | 7.6% | 3.0% |
| Work colleagues | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% |
| Other combinations ⁽¹⁾ | 12.4% | 6.9% | 18.1% | 21.5% | 11.0% |

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

How do they rate the destination?



| Impression of their stay | LZ | FUE | GC | TFE | LP |
|--------------------------------|-------|-------|-------|-------|-------|
| Good or very good (% tourists) | 95.5% | 94.7% | 96.5% | 95.6% | 98.7% |
| Average rating (scale 1-10) | 9.02 | 9.10 | 9.02 | 8.97 | 9.22 |

How many are loyal to the destination?

| Repeat tourists of each island | LZ | FUE | GC | TFE | LP |
|---------------------------------------|-------|-------|-------|-------|-------|
| Repeat tourists | 38.8% | 37.0% | 49.9% | 58.4% | 39.5% |
| In love (at least 10 previous visits) | 0.0% | 3.5% | 6.1% | 10.0% | 7.2% |

Where does the flight come from?



| Ten main origin markets | LZ | FUE | GC | TFE | LP |
|-------------------------|-------|-------|-------|-------|-------|
| Belgium | 89.5% | 73.9% | 90.9% | 92.4% | 82.1% |
| Spanish Mainland | 2.5% | 11.1% | 5.4% | 2.5% | 11.1% |
| Germany | 0.0% | 3.5% | 1.1% | 2.8% | 3.1% |
| Netherlands | 3.6% | 7.4% | 0.0% | 0.7% | 3.7% |
| France | 2.2% | 0.9% | 0.0% | 0.1% | 0.0% |
| United Kingdom | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% |
| Ireland | 0.0% | 1.6% | 0.0% | 0.0% | 0.0% |
| Sweden | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Norway | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Italy | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Why do they choose the Canary Islands?



| Aspects influencing the choice | LZ | FUE | GC | TFE | LP |
|-----------------------------------|-------|-------|-------|-------|-------|
| Climate/sun | 98.3% | 93.7% | 97.6% | 97.1% | 90.4% |
| Tranquillity/rest/relaxation | 38.4% | 41.0% | 49.3% | 44.2% | 48.4% |
| Scenery | 31.8% | 19.1% | 22.8% | 28.9% | 56.0% |
| Beaches | 8.9% | 54.9% | 26.9% | 17.9% | 4.9% |
| Security | 12.6% | 11.6% | 17.9% | 14.9% | 8.7% |
| Visiting new places | 22.4% | 10.1% | 10.9% | 12.2% | 11.2% |
| Price | 13.2% | 10.9% | 10.9% | 10.1% | 9.0% |
| Quality of the environment | 13.8% | 2.9% | 6.5% | 6.5% | 20.5% |
| Shopping | 0.0% | 0.0% | 5.6% | 9.5% | 2.4% |
| Active tourism | 8.5% | 12.5% | 2.9% | 5.7% | 21.7% |
| Suitable destination for children | 6.2% | 5.1% | 4.5% | 3.3% | 2.0% |
| Ease of travel | 6.9% | 4.7% | 3.5% | 2.0% | 1.4% |
| Nautical activities | 7.6% | 2.9% | 1.4% | 3.0% | 0.0% |
| Culture | 6.5% | 0.0% | 1.2% | 2.1% | 2.0% |
| Nightlife/fun | 0.0% | 1.8% | 3.2% | 2.1% | 0.0% |
| Rural tourism | 3.9% | 0.0% | 1.6% | 1.4% | 2.5% |

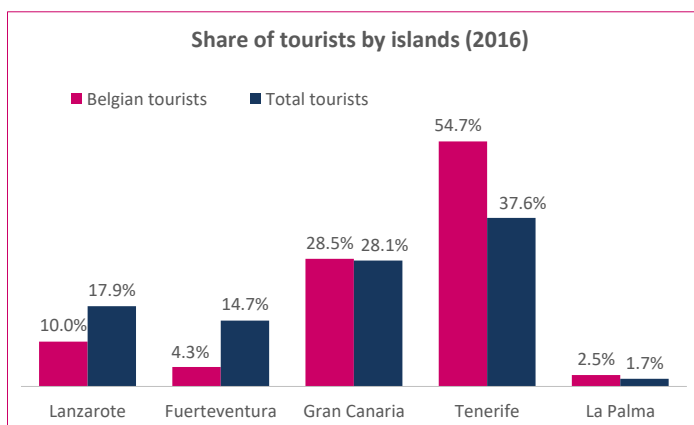
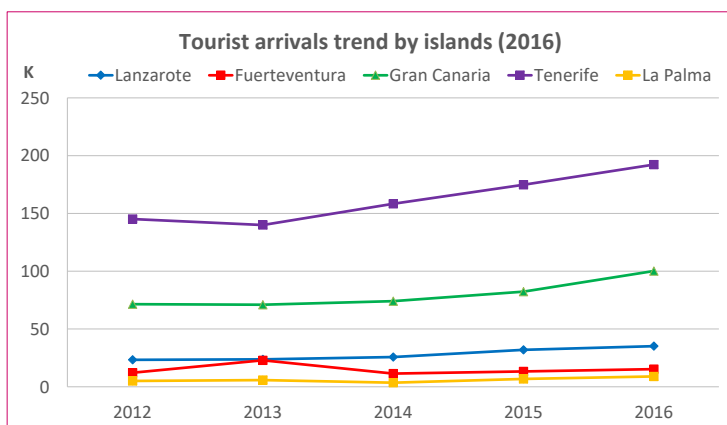
* Multi-choice question

What did motivate them to come?



| Aspects motivating the choice | LZ | FUE | GC | TFE | LP |
|--|-------|-------|-------|-------|-------|
| Previous visits to the Canary Islands | 58.3% | 64.0% | 63.8% | 61.4% | 62.8% |
| Recommendation by friends or relatives | 32.4% | 24.3% | 29.8% | 40.7% | 17.5% |
| The Canary Islands television channel | 0.0% | 0.0% | 0.8% | 0.5% | 0.0% |
| Other television or radio channels | 0.7% | 0.0% | 0.0% | 0.3% | 0.9% |
| Information in the press/magazines/books | 7.0% | 7.5% | 3.0% | 1.9% | 5.5% |
| Attendance at a tourism fair | 0.0% | 0.0% | 1.2% | 0.8% | 1.3% |
| Tour Operator's brochure or catalogue | 25.1% | 14.7% | 15.9% | 9.0% | 16.5% |
| Recommendation by Travel Agency | 9.1% | 7.6% | 13.0% | 11.0% | 9.0% |
| Information obtained via the Internet | 28.3% | 36.8% | 20.5% | 17.3% | 27.0% |
| Senior Tourism programme | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% |
| Others | 2.0% | 3.1% | 2.5% | 3.9% | 7.4% |

* 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.