

## Tourist profile trend (2015)

### Canary Islands: Belgian



#### How many they are and how much do they spend?



	2011	2012	2013	2014	2015
Tourist arrivals (> 16 years old)	295,174	276,997	298,581	320,768	344,091
Average daily expenditure (€)	133.77	135.02	136.46	136.37	133.74
- in their place of residence	99.04	98.28	99.59	99.23	96.04
- in the Canary Islands	34.73	36.74	36.87	37.13	37.70
Average length of stay	10.37	9.58	10.50	9.54	10.42
Turnover per tourist (€)	1,166	1,174	1,218	1,158	1,192
Total turnover (> 16 years old) (€m)	344	325	364	371	410
Year on year variation of turnover	--	-5.5%	11.8%	2.1%	10.4%
Year on year variation of tourist	--	-6.2%	7.8%	7.4%	7.3%

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

<b>Accommodation (*):</b>	38.92	45.84	42.63	55.17	64.18
- Accommodation	29.97	41.50	36.69	50.08	55.13
- Additional accommodation expenses	8.96	4.33	5.94	5.09	9.05
<b>Transport:</b>	30.29	28.00	32.09	31.83	28.90
- Public transport	4.80	4.09	7.44	7.33	6.24
- Taxi	8.02	8.27	6.37	7.83	6.13
- Car rental	17.46	15.64	18.28	16.67	16.52
<b>Food and drink:</b>	131.01	127.82	173.23	138.53	161.73
- Food purchases at supermarkets	53.15	49.24	92.77	65.39	74.87
- Restaurants	77.85	78.58	80.46	73.14	86.85
<b>Souvenirs:</b>	57.80	71.69	71.39	64.48	71.03
<b>Leisure:</b>	28.87	33.65	36.44	30.57	31.02
- Organized excursions	14.21	17.22	15.16	15.48	13.34
- Leisure, amusement	4.21	4.55	2.70	4.45	2.87
- Trip to other islands	1.38	0.68	1.69	1.04	1.13
- Sporting activities	3.67	4.04	9.58	4.62	5.08
- Cultural activities	1.87	1.74	2.21	1.78	2.53
- Discos and disco-pubs	3.52	5.40	5.09	3.20	6.08
<b>Others:</b>	26.62	29.09	91.32	17.77	11.23
- Wellness	2.58	3.43	3.88	2.59	1.93
- Medical expenses	1.43	1.16	1.59	1.66	1.71
- Other expenses	22.61	24.50	85.85	13.51	7.59

#### How far in advance do they book their trip?



	2011	2012	2013	2014	2015
The same day they leave	0.1%	1.0%	0.3%	0.7%	0.3%
Between 2 and 7 days	9.2%	8.9%	8.5%	10.2%	7.5%
Between 8 and 15 days	9.8%	10.8%	9.4%	9.7%	6.6%
Between 16 and 30 days	15.8%	17.8%	16.1%	16.3%	17.6%
Between 31 and 90 days	29.1%	31.9%	30.8%	29.2%	35.0%
More than 90 days	36.1%	29.6%	34.9%	34.0%	33.1%

#### What do they book at their place of residence?



	2011	2012	2013	2014	2015
Flight only	16.8%	17.4%	16.1%	15.9%	19.6%
Flight and accommodation (room only)	15.4%	13.2%	17.0%	16.6%	18.1%
Flight and accommodation (B&B)	5.1%	5.2%	3.9%	5.0%	3.3%
Flight and accommodation (half board)	24.4%	29.7%	28.7%	23.7%	25.0%
Flight and accommodation (full board)	3.7%	2.4%	2.9%	4.1%	3.2%
Flight and accommodation (all inclusive)	34.5%	32.1%	31.4%	34.8%	30.8%
<b>% Tourists using low-cost airlines</b>	<b>31.8%</b>	<b>32.0%</b>	<b>31.3%</b>	<b>31.0%</b>	<b>38.8%</b>
<b>Other expenses in their place of residence:</b>					
- Car rental	11.1%	10.0%	12.7%	12.3%	14.4%
- Sporting activities	6.3%	5.7%	4.7%	4.8%	5.0%
- Excursions	6.1%	7.1%	6.0%	6.2%	7.6%
- Combined trip to other islands	0.2%	0.7%	0.7%	0.6%	0.7%

#### How do they book?



	2011	2012	2013	2014	2015
<b>Accommodation booking</b>					
<b>Tour Operator</b>	46.3%	46.4%	42.6%	45.2%	42.1%
- Tour Operator's website	58.3%	66.0%	67.3%	71.9%	66.3%
<b>Accommodation</b>	13.8%	15.1%	15.9%	17.0%	16.9%
- Accommodation's website	76.2%	77.9%	81.3%	78.9%	77.8%
<b>Travel agency (High street)</b>	18.0%	19.3%	19.2%	16.3%	15.8%
<b>Online Travel Agency (OTA)</b>	10.1%	9.3%	10.5%	10.2%	11.8%
<b>No need to book accommodation</b>	11.8%	9.9%	11.8%	11.2%	13.3%

#### Flight booking

	2011	2012	2013	2014	2015
<b>Tour Operator</b>	61.6%	55.7%	51.9%	54.1%	48.8%
- Tour Operator's website	59.8%	67.0%	64.0%	69.9%	64.7%
<b>Airline</b>	21.3%	23.8%	25.4%	24.7%	28.9%
- Airline's website	96.2%	95.3%	98.9%	96.9%	98.1%
<b>Travel agency (High street)</b>	13.4%	16.5%	16.4%	15.3%	14.4%
<b>Online Travel Agency (OTA)</b>	3.6%	4.0%	6.4%	5.9%	7.9%

#### Where do they stay?



	2011	2012	2013	2014	2015
5* Hotel	11.6%	10.6%	11.3%	11.2%	12.0%
4* Hotel	43.9%	47.5%	44.7%	45.2%	42.0%
1-2-3* Hotel	11.6%	15.7%	10.9%	10.2%	8.9%
Apartment	21.7%	16.5%	21.7%	23.0%	22.8%
Property (privately-owned, friends, family)	7.9%	8.4%	8.3%	9.0%	11.6%
Others	3.2%	1.4%	3.0%	1.5%	2.8%

#### How are they?



	2011	2012	2013	2014	2015
<b>Gender</b>					
Percentage of men	55.7%	51.9%	49.3%	55.3%	54.3%
Percentage of women	44.3%	48.1%	50.7%	44.7%	45.7%

#### Age

Average age (tourists > 16 years old)	46.9	46.1	46.6	45.0	47.2
Standard deviation	14.9	15.0	14.9	14.5	14.9
<b>Age range</b>	0.0	0.0	0.0	0.0	0.0
16-24 years old	5.3%	6.1%	8.0%	6.2%	6.4%
25-30 years old	10.7%	12.8%	10.4%	12.7%	11.8%
31-45 years old	34.2%	33.3%	28.9%	35.9%	27.9%
46-60 years old	27.2%	26.4%	32.3%	29.0%	32.8%
Over 60 years old	22.7%	21.4%	20.4%	16.3%	21.2%

#### Occupation

Business owner or self-employed	22.0%	21.1%	18.3%	21.3%	21.0%
Upper/Middle management employee	36.0%	35.8%	39.2%	39.4%	38.5%
Auxiliary level employee	13.6%	15.6%	15.4%	16.8%	15.2%
Students	4.7%	4.7%	5.3%	4.6%	3.9%
Retired	21.9%	20.7%	18.8%	16.4%	19.4%
Unemployed / unpaid dom. work	1.8%	2.1%	3.0%	1.6%	2.1%

#### Annual household income level

€12,000 - €24,000	16.8%	19.0%	17.4%	15.2%	19.3%
€24,001 - €36,000	30.1%	26.4%	25.7%	21.7%	20.3%
€36,001 - €48,000	17.0%	19.1%	19.3%	21.9%	18.6%
€48,001 - €60,000	13.2%	16.3%	17.0%	15.7%	17.9%
€60,001 - €72,000	5.1%	7.5%	6.9%	7.2%	8.0%
€72,001 - €84,000	4.4%	4.4%	4.4%	5.7%	5.0%
More than €84,000	13.4%	7.3%	9.3%	12.7%	10.9%

(\*) Bear in mind that 80% of belgian tourists in 2015 paid the accommodation before travelling.

## Tourist profile trend (2015)

### Canary Islands: Belgian



#### Which island do they choose?

Tourists (> 16 years old)	2011	2012	2013	2014	2015
- Lanzarote	32,588	23,365	27,351	32,264	38,477
- Fuerteventura	16,098	12,165	18,307	18,500	17,857
- Gran Canaria	75,934	76,515	83,626	82,494	80,920
- Tenerife	159,578	156,233	160,624	177,671	194,810
- La Palma	6,445	5,721	6,396	6,294	8,235

Share (%)	2011	2012	2013	2014	2015
- Lanzarote	11.2%	8.5%	9.2%	10.2%	11.3%
- Fuerteventura	5.5%	4.4%	6.2%	5.8%	5.2%
- Gran Canaria	26.1%	27.9%	28.2%	26.0%	23.8%
- Tenerife	54.9%	57.0%	54.2%	56.0%	57.2%
- La Palma	2.2%	2.1%	2.2%	2.0%	2.4%

#### Who do they come with?



	2011	2012	2013	2014	2015
Unaccompanied	7.1%	8.4%	8.3%	9.0%	10.8%
Only with partner	52.1%	50.8%	51.1%	47.3%	51.5%
Only with children (under the age of 13)	2.7%	1.7%	1.0%	1.5%	2.4%
Partner + children (under the age of 13)	13.1%	13.8%	12.5%	13.5%	10.1%
Other relatives	4.7%	4.4%	5.3%	5.7%	4.0%
Friends	5.6%	5.8%	5.4%	5.3%	5.6%
Work colleagues	0.2%	0.1%	0.5%	0.4%	0.1%

#### Why do they choose the Canary Islands?



Aspects influencing the choice	2011	2012	2013	2014	2015
Climate/sun	95.1%	95.7%	93.8%	95.4%	93.7%
Tranquility/rest/relaxation	48.8%	47.3%	44.8%	44.1%	44.6%
Scenery	28.6%	22.9%	25.1%	29.8%	28.9%
Beaches	23.1%	20.0%	22.7%	24.8%	21.6%
Visiting new places	12.2%	12.9%	13.6%	14.0%	11.9%
Price	11.1%	13.3%	11.8%	10.5%	11.4%
Security	6.3%	7.7%	7.8%	7.8%	11.1%
Quality of the environment	8.8%	6.0%	7.0%	6.8%	9.2%
Shopping	7.8%	7.6%	6.8%	7.2%	6.7%
Active tourism	4.9%	3.7%	6.4%	6.6%	6.3%
Suitable destination for children	6.5%	6.0%	4.9%	6.4%	5.7%
Nautical activities	2.5%	2.4%	3.3%	2.6%	2.8%
Nightlife/fun	1.7%	3.1%	4.1%	2.1%	2.5%
Culture	1.5%	1.2%	1.7%	1.5%	2.3%
Rural tourism	1.4%	0.8%	1.4%	0.6%	2.1%
Ease of travel	3.1%	2.7%	2.8%	2.4%	1.2%

\* Multi-choice question

#### How do they value the destination?



Impression of their stay	2011	2012	2013	2014	2015
Good or very good (% tourists)	94.0%	95.0%	95.5%	94.8%	93.5%
Average rating (scale 1-10)	8.88	8.87	8.95	8.87	8.88

#### How many are loyal to the destination?

Percentage of repeat tourists	2011	2012	2013	2014	2015
Repeat tourists	75.1%	75.9%	75.0%	75.3%	77.8%
In love (more than 10 visits)	16.0%	16.9%	17.3%	14.7%	19.0%

#### Where does the flight come from?



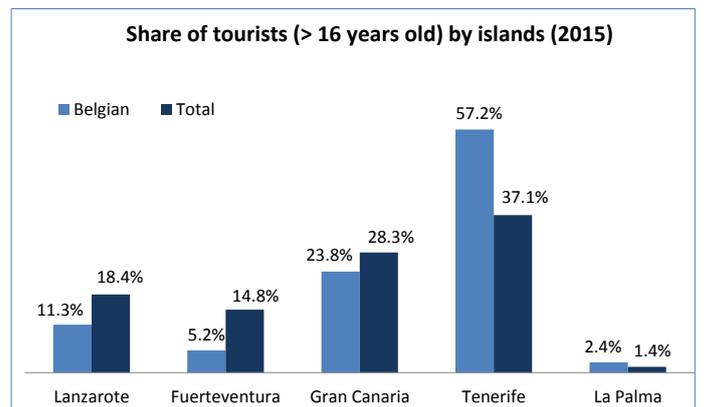
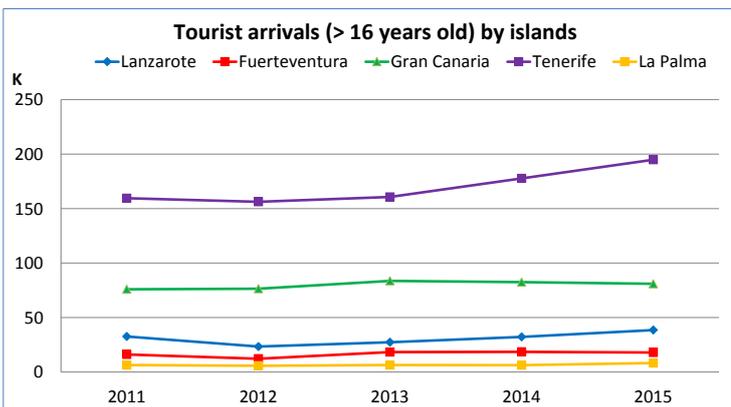
Ten main origin countries	2011	2012	2013	2014	2015
Belgium	264,891	258,080	265,206	274,532	298,006
Netherlands	8,038	6,374	3,375	21,132	16,791
Spain	6,339	1,846	14,393	9,727	14,159
Germany	3,800	4,843	10,166	7,485	10,997
Others	7,520	5,379	4,072	3,569	3,014
United Kingdom	3,535	0	215	210	529
France	891	476	1,154	1,613	358
Ireland	0	0	0	126	238
Austria	0	0	0	0	0
Denmark	161	0	0	0	0

#### What did motivate them to come?



Aspects motivating the choice	2011	2012	2013	2014	2015
Previous visits to the Canary Islands	65.0%	66.8%	61.1%	63.9%	64.6%
Recommendation by friends or relatives	36.3%	36.7%	35.9%	37.8%	35.1%
The Canary Islands television channel	0.3%	1.3%	0.4%	0.3%	0.7%
Other television or radio channels	0.7%	0.8%	1.1%	0.9%	0.6%
Information in the press/magazines/books	4.7%	4.5%	3.9%	3.9%	5.2%
Attendance at a tourism fair	1.3%	1.0%	1.1%	1.0%	0.7%
Tour Operator's brochure or catalogue	16.7%	11.4%	16.5%	13.4%	11.0%
Recommendation by Travel Agency	11.2%	11.1%	9.6%	9.2%	10.2%
Information obtained via the Internet	19.7%	18.3%	18.3%	20.5%	18.8%
Senior Tourism programme	0.0%	0.4%	0.0%	0.0%	0.0%
Others	5.0%	5.4%	6.5%	4.1%	4.2%

\* Multi-choice question



Source: ISTAC (Encuesta sobre el Gasto Turístico).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.