

Tourist profile by quarter of trip (2023)

BELGIUM



How many are they and how much do they spend?



	2023Q1	2023Q2	2023Q3	2023Q4	2023	% tourists who book holiday package	Average daily expenditure (€) (without flight)
TOURISTS							
Tourist arrivals (FRONTUR) (*)	102	106	105	119	432	2023Q1	44.6%
Tourist arrivals ≥ 16 years old (EGT) (*)	93	88	88	113	382	2023Q2	47.5%
- book holiday package (*)	42	42	48	52	183	2023Q3	54.7%
- do not book holiday package (*)	52	46	40	61	199	2023Q4	45.9%
- % tourists who book holiday package	44.6%	47.5%	54.7%	45.9%	48.0%	2023	48.0%
Children < 16 years old (FRONTUR - EGT) (*)	8	18	17	6	50	2023	132.0
(*) Thousand of tourists							
Expenditure per tourist (€)							
Expenditure per tourist (€)	1,731	1,450	1,610	1,550	1,585	Average lenght of stay	
- book holiday package	311	336	325	406	344	2023Q1	11.60
- holiday package	263	282	270	357	293	2023Q2	11.89
- others	48	55	55	49	51	2023Q3	11.06
- do not book holiday package	290	346	246	257	281	2023Q4	9.66
- flight	76	75	75	76	75	2023	10.97
- accommodation	114	147	48	77	95		
- others	100	124	124	104	111		
Average lenght of stay	11.60	11.89	11.06	9.66	10.97		
Average daily expenditure (€)	189.7	156.6	181.6	195.8	182.0		
Average daily expenditure (without flight)	139.5	120.5	129.4	136.6	132.0		
Average cost of the flight (€)	75.9	73.1	85.9	101.0	84.9		
Total turnover (≥ 16 years old) (€m)	162	128	141	175	605		

% Tourists whose spending has been greater than €0 in each item

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Accommodation:					
- Accommodation	79.5%	81.7%	72.8%	73.9%	76.8%
- Additional accommodation expenses	9.8%	8.5%	4.5%	7.6%	7.6%
Transport:					
- National/International Transport	93.5%	94.8%	90.4%	93.5%	93.1%
- Flights between islands	9.8%	1.9%	4.2%	3.8%	4.9%
- Taxi	47.5%	59.4%	52.6%	50.3%	52.3%
- Car rental	45.8%	37.1%	25.0%	37.5%	36.5%
- Public transport	9.8%	13.5%	12.6%	11.4%	11.8%
Food and drink:					
- Food purchases at supermarkets	57.9%	62.7%	47.2%	54.1%	55.4%
- Restaurants	75.1%	69.2%	65.1%	64.9%	68.4%
Leisure:					
- Organized excursions	25.3%	27.1%	33.3%	24.3%	27.2%
- Sport activities	13.6%	8.6%	8.2%	11.0%	10.5%
- Cultural activities	2.5%	2.3%	2.6%	6.0%	3.5%
- Museums	9.8%	6.3%	4.8%	6.8%	7.0%
- Theme Parks	8.3%	5.8%	15.7%	7.7%	9.3%
- Discos and pubs	7.0%	6.8%	9.5%	3.2%	6.4%
- Wellness	8.6%	10.7%	7.8%	9.7%	9.2%
Purchases of goods:					
- Souvenirs	41.2%	52.5%	45.4%	41.6%	44.9%
- Real state	0.5%	0.7%	1.4%	0.0%	0.6%
- Other expenses	0.5%	0.5%	1.1%	0.4%	0.6%
Other:					
- Medical or pharmaceutical expenses	11.2%	13.7%	7.7%	8.6%	10.2%
- Other expenses	4.9%	9.3%	6.7%	5.1%	6.4%

Source: Encuesta sobre el Gasto Turístico (ISTAC).

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

Average expenditure of tourists whose spending has been greater than €0 in each item

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Accommodation:					
Expenditure per tourist and trip (€)	1,112	958	934	1,014	1,007
- Accommodation	1,009	876	827	874	898
- Additional accommodation expenses	103	82	107	141	109
Transport:					
Expenditure per tourist and trip (€)	811	612	902	836	789
- National/International Transport	469	327	528	519	464
- Flights between islands	55	58	82	80	66
- Taxi	114	79	116	86	97
- Car rental	149	115	145	127	134
- Public transport	25	32	31	24	28
Food and drink:					
Expenditure per tourist and trip (€)	335	291	417	305	333
- Food purchases at supermarkets	99	99	162	85	107
- Restaurants	236	192	255	220	225
Leisure:					
Expenditure per tourist and trip (€)	466	466	696	596	566
- Organized excursions	84	92	122	119	106
- Sport activities	128	100	83	77	98
- Cultural activities	34	26	98	60	57
- Museums	28	29	38	55	38
- Theme Parks	65	49	63	81	66
- Discos and pubs	56	87	175	115	113
- Wellness	71	84	118	89	89
Purchases of goods:					
Expenditure per tourist and trip (€)	203	1,637	2,005	184	1,379
- Souvenirs	120	106	128	125	119
- Real state	50	30	1,352	0	746
- Other expenses	33	1,500	525	59	514
Other:					
Expenditure per tourist and trip (€)	105	102	136	124	117
- Medical or pharmaceutical expenses	44	23	38	32	34
- Other expenses	60	80	98	92	83

Tourist profile by quarter of trip (2023)

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What is the main purpose of their trip?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Holiday, leisure	93.6%	95.2%	93.5%	91.0%	93.2%
Visiting family or friends	5.4%	3.1%	5.7%	7.0%	5.4%
Business and work	0.6%	1.3%	0.4%	1.4%	0.9%
Education and training	0.0%	0.0%	0.0%	0.0%	0.0%
Sports training	0.0%	0.0%	0.1%	0.7%	0.2%
Health or medical care	0.5%	0.4%	0.0%	0.0%	0.2%
Fairs and congresses	0.0%	0.0%	0.2%	0.0%	0.0%
Others	0.0%	0.0%	0.0%	0.0%	0.0%

What is the main motivation for their holidays?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Rest	49.6%	51.6%	42.8%	51.2%	49.0%
Enjoy family time	16.3%	10.1%	13.6%	10.1%	12.4%
Have fun	7.0%	5.1%	13.5%	7.3%	8.2%
Explore the destination	21.1%	27.0%	27.7%	27.4%	25.9%
Practice their hobbies	4.1%	3.1%	1.6%	2.1%	2.7%
Other reasons	1.8%	3.2%	0.7%	1.8%	1.9%

Where did they spend their main holiday last year? *

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Didn't have holidays	10.8%	12.0%	9.1%	6.9%	9.6%
Canary Islands	30.7%	25.1%	24.8%	30.4%	27.6%
Other destination	58.5%	63.0%	66.0%	62.7%	62.8%
Balearic Islands	2.2%	4.9%	2.2%	2.3%	2.8%
Rest of Spain	10.3%	9.1%	8.6%	11.3%	9.8%
Italy	5.8%	6.0%	10.3%	7.4%	7.6%
France	16.6%	11.7%	13.9%	16.0%	14.5%
Turkey	0.7%	3.1%	2.8%	1.4%	2.0%
Greece	5.0%	8.0%	6.1%	5.2%	6.1%
Portugal	3.1%	3.0%	3.5%	4.0%	3.4%
Croatia	2.8%	0.4%	2.5%	0.6%	1.6%
Egypt	2.5%	0.5%	0.6%	0.6%	1.0%
Tunisia	0.7%	1.3%	0.3%	0.0%	0.5%
Morocco	0.0%	1.5%	1.0%	0.7%	0.8%
Others	8.8%	13.5%	14.2%	13.3%	12.6%

* Percentage of valid answers

What other destinations did they consider for this trip? *

	2023Q1	2023Q2	2023Q3	2023Q4	2023
None (I was clear about "this Canary Island")	37.0%	24.3%	21.6%	34.7%	29.2%
Canary Islands (other island)	25.9%	23.5%	16.6%	24.5%	22.4%
Other destination	37.2%	52.2%	61.8%	40.8%	48.4%
Balearic Islands	3.1%	4.9%	5.4%	3.7%	4.3%
Rest of Spain	7.8%	12.8%	12.5%	8.1%	10.4%
Italy	4.0%	6.5%	5.9%	5.3%	5.5%
France	3.0%	2.6%	2.6%	2.6%	2.7%
Turkey	2.8%	2.2%	6.0%	2.7%	3.5%
Greece	5.2%	10.1%	15.2%	6.4%	9.4%
Portugal	2.8%	5.6%	5.7%	4.0%	4.6%
Croatia	2.2%	1.3%	4.2%	1.3%	2.3%
Egypt	3.4%	2.7%	2.1%	3.3%	2.8%
Others	2.9%	3.5%	2.1%	3.4%	3.0%

* Percentage of valid answers

Importance of each factor in the destination choice

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Climate	81.0%	78.7%	62.2%	76.8%	74.9%
Tranquility	52.2%	48.8%	50.9%	49.9%	50.4%
Safety	45.5%	43.4%	46.3%	42.3%	44.3%
Sea	41.1%	42.4%	42.0%	40.5%	41.4%
Landscapes	41.5%	41.1%	36.2%	40.3%	39.9%
European belonging	37.6%	41.8%	31.7%	40.4%	38.0%
Accommodation supply	38.3%	34.4%	37.3%	37.0%	36.8%
Price	27.2%	32.6%	27.9%	35.0%	30.9%
Environment	28.3%	31.5%	26.6%	30.1%	29.1%
Gastronomy	26.3%	29.3%	25.1%	26.8%	26.8%
Beaches	23.2%	23.6%	27.5%	28.3%	25.8%
Effortless trip	21.2%	24.3%	22.9%	21.3%	22.3%
Authenticity	21.1%	25.7%	20.3%	20.6%	21.8%
Fun possibilities	17.5%	16.7%	28.1%	19.5%	20.3%
Exoticism	15.3%	20.8%	19.0%	19.9%	18.8%
Hiking trail network	21.0%	13.3%	11.3%	15.9%	15.5%
Shopping	8.6%	13.5%	9.5%	10.2%	10.4%
Historical heritage	10.9%	11.7%	4.5%	9.7%	9.3%
Culture	8.5%	6.3%	5.8%	10.4%	7.9%
Nightlife	2.6%	3.8%	7.0%	2.7%	3.9%

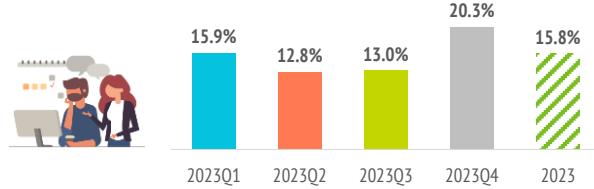
Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important")

% of tourists who indicate that the factor is "very important" in their choice.

How far in advance do they book their trip?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
The same day	1.7%	0.2%	2.8%	1.4%	1.5%
Between 1 and 30 days	24.0%	28.6%	36.1%	26.0%	28.4%
Between 1 and 2 months	27.0%	29.5%	18.1%	21.1%	23.8%
Between 3 and 6 months	31.3%	29.0%	30.0%	31.3%	30.5%
More than 6 months	15.9%	12.8%	13.0%	20.3%	15.8%

% TOURISTS WHO BOOK MORE THAN 6 MONTHS IN ADVANCE



What channels did they use to get information about the trip?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Previous visits to the Canary Islands	55.5%	50.0%	40.5%	42.5%	46.9%
Friends or relatives	27.0%	25.8%	30.7%	30.5%	28.6%
Internet or social media	40.4%	49.3%	44.9%	38.8%	43.0%
Mass Media	0.8%	0.4%	2.9%	1.4%	1.4%
Travel guides and magazines	9.1%	7.3%	8.0%	8.6%	8.3%
Travel Blogs or Forums	4.2%	6.6%	5.4%	4.0%	5.0%
Travel TV Channels	0.3%	1.1%	2.0%	0.5%	0.9%
Tour Operator or Travel Agency	26.5%	29.6%	29.4%	27.1%	28.1%
Public administrations or similar	0.0%	0.0%	0.2%	0.5%	0.2%
Others	2.2%	3.2%	5.1%	1.3%	2.9%

* Multi-choice question

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With whom did they book their flight and accommodation? 🕳️

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Flight					
- Directly with the airline	47.3%	42.5%	43.7%	50.7%	46.4%
- Tour Operator or Travel Agency	52.7%	57.5%	56.3%	49.3%	53.6%
Accommodation					
- Directly with the accommodation	38.1%	34.9%	30.3%	30.2%	33.4%
- Tour Operator or Travel Agency	61.9%	65.1%	69.7%	69.8%	66.6%

Where does the flight come from? 🌎

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Belgium	84.2%	84.7%	85.2%	69.2%	80.1%
Netherlands	4.0%	3.2%	4.8%	13.2%	6.7%
Spanish Mainland	3.0%	3.4%	2.3%	6.3%	3.9%
Luxembourg	1.5%	3.3%	1.9%	6.9%	3.6%
Germany	4.1%	3.0%	1.7%	1.9%	2.6%
France	2.3%	1.5%	0.4%	0.0%	1.0%
Others	0.9%	0.9%	3.6%	2.5%	2.0%

Where do they stay? 🏨

	2023Q1	2023Q2	2023Q3	2023Q4	2023
1-2-3* Hotel	7.8%	5.3%	7.2%	3.2%	5.7%
4* Hotel	34.1%	45.7%	38.9%	40.8%	39.9%
5* Hotel / 5* Luxury Hotel	15.2%	14.5%	14.8%	9.8%	13.4%
Aparthotel / Tourist Villa	8.4%	12.4%	10.3%	10.2%	10.3%
House/room rented in a private dwelling	8.7%	5.0%	2.4%	6.8%	5.9%
Private accommodation (1)	10.7%	8.8%	11.6%	17.2%	12.4%
Others (Cottage, cruise, camping,...)	15.1%	8.1%	14.7%	12.0%	12.5%

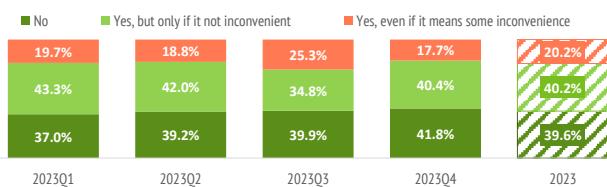
(1) Own property / House of friends or relatives / Free housing exchange / Other private accommodation.

What do they book? 🎪

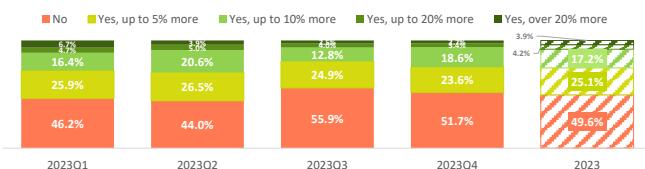
	2023Q1	2023Q2	2023Q3	2023Q4	2023
Room only	26.8%	17.4%	13.6%	21.9%	20.2%
Bed and Breakfast	11.4%	14.9%	12.9%	8.5%	11.8%
Half board	35.3%	32.5%	29.0%	30.1%	31.7%
Full board	1.6%	2.2%	5.3%	5.3%	3.6%
All inclusive	24.9%	33.0%	39.3%	34.2%	32.7%

Sustainable Destination

When booking a trip, do they tend to choose the most sustainable options?

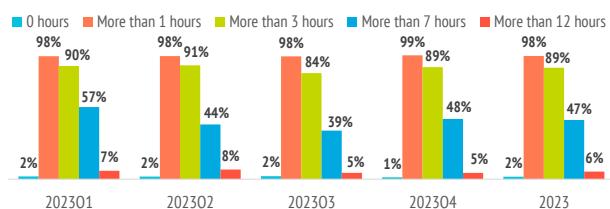


Would they be willing to spend more on travel to reduce their carbon footprint?



Activities in the Canary Islands

Outdoor time per day	2023Q1	2023Q2	2023Q3	2023Q4	2023
0 hours	2.2%	2.1%	2.3%	1.5%	2.0%
1 - 2 hours	7.8%	7.4%	13.3%	9.4%	9.4%
3 - 6 hours	32.7%	47.1%	45.7%	41.2%	41.5%
7 - 12 hours	50.7%	35.8%	33.7%	42.9%	41.1%
More than 12 hours	6.6%	7.7%	5.0%	5.0%	6.0%
Outdoor time per day	7.1	6.8	6.2	6.9	6.7



Activities in the Canary Islands	2023Q1	2023Q2	2023Q3	2023Q4	2023
Walk, wander	77.9%	82.0%	83.5%	81.0%	81.0%
Swimming pool, hotel facilities	57.2%	66.4%	78.6%	63.0%	65.9%
Beach	52.0%	52.5%	63.4%	59.4%	56.9%
Explore the island on their own	51.4%	48.8%	53.0%	50.0%	50.8%
Hiking	45.7%	48.8%	35.4%	43.1%	43.3%
Taste Canarian gastronomy	20.1%	20.9%	22.9%	22.9%	21.8%
Organized excursions	16.0%	16.6%	28.9%	16.7%	19.3%
Sea excursions / whale watching	9.7%	9.0%	25.4%	11.1%	13.5%
Theme parks	11.4%	9.1%	19.8%	10.0%	12.4%
Swim	10.2%	13.0%	17.0%	6.5%	11.3%
Museums / exhibitions	9.6%	11.6%	13.3%	8.4%	10.5%
Nightlife / concerts / shows	8.1%	5.9%	15.3%	6.5%	8.8%
Wineries / markets / popular festivals	5.1%	9.6%	10.3%	8.6%	8.3%
Beauty and health treatments	10.6%	9.1%	7.0%	6.5%	8.2%
Running	9.1%	4.0%	8.4%	4.5%	6.4%
Practice other sports	9.9%	2.6%	4.2%	4.4%	5.3%
Other Nature Activities	5.1%	3.5%	7.9%	4.6%	5.2%
Astronomical observation	4.6%	4.6%	5.0%	5.1%	4.9%
Cycling / Mountain bike	6.2%	2.5%	2.7%	3.4%	3.7%
Scuba Diving	1.1%	2.6%	4.8%	3.0%	2.9%
Golf	6.1%	2.1%	2.0%	1.1%	2.8%
Surf	2.8%	0.8%	2.7%	3.4%	2.5%
Windsurf / Kitesurf	1.2%	0.2%	0.8%	0.4%	0.6%

* Multi-choice question

Perception of the following sustainability measures during their stay *

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Quality of life on the island	8.0	7.9	7.9	8.1	8.0
Tolerance towards tourism	8.3	8.5	8.2	8.3	8.3
Cleanliness of the island	8.5	8.3	8.0	7.9	8.1
Air quality	8.3	8.6	8.0	8.2	8.3
Rational water consumption	7.5	7.8	7.6	7.5	7.6
Energy saving	7.2	7.3	7.0	7.1	7.1
Use of renewable energy	7.3	7.3	6.7	6.9	7.0
Recycling	7.2	7.4	7.0	6.8	7.1
Easy to get around by public transport	7.4	7.4	7.7	7.2	7.4
Overcrowding in tourist areas	6.8	7.0	6.7	6.4	6.7
Supply of local products	7.4	7.4	7.3	7.3	7.3

* Scale 0 - 10 (0 = Not important and 10 = Very important)

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Which island do they choose?

Tourists (≥ 16 year old)	2023Q1	2023Q2	2023Q3	2023Q4	2023
Lanzarote	11,843	12,274	12,887	14,149	51,153
Fuerteventura	6,461	4,033	3,448	7,050	20,992
Gran Canaria	20,683	23,310	24,130	26,517	94,640
Tenerife	53,201	47,242	46,646	64,170	211,259
La Palma	1,031	767	696	497	2,991



How many are loyal to the Canary Islands?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Repeat tourists	76.8%	72.6%	70.8%	66.1%	71.3%
At least 10 previous visits	19.6%	22.6%	15.9%	19.4%	19.4%
Repeat tourists (last 5 years)	70.8%	68.1%	62.8%	59.3%	64.9%
Repeat tourists (last 5 years) (5 or more)	20.2%	23.6%	17.0%	18.9%	19.9%

Who are they?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
<u>Gender</u>					
Men	48.6%	47.7%	52.8%	49.0%	49.5%
Women	51.4%	52.3%	47.2%	51.0%	50.5%
<u>Age</u>					
Average age	52.0	53.6	43.2	51.2	50.1
Standard deviation	16.6	15.6	16.4	15.7	16.5
<u>Age range</u>					
16 - 24 years old	7.5%	3.5%	20.0%	2.8%	8.0%
25 - 30 years old	3.9%	7.6%	8.6%	11.0%	7.9%
31 - 45 years old	26.4%	20.3%	25.8%	21.5%	23.4%
46 - 60 years old	26.0%	27.8%	29.7%	33.0%	29.3%
Over 60 years old	36.3%	40.7%	15.9%	31.8%	31.3%
<u>Occupation</u>					
Salaried worker	34.9%	39.3%	47.4%	54.8%	44.7%
Self-employed	12.8%	11.6%	10.4%	6.1%	10.0%
Unemployed	0.0%	0.0%	1.3%	0.2%	0.4%
Business owner	13.1%	11.1%	16.6%	7.7%	11.8%
Student	5.0%	0.5%	11.2%	2.2%	4.6%
Retired	31.6%	34.2%	13.1%	27.8%	26.8%
Unpaid domestic work	0.5%	1.0%	0.0%	0.0%	0.4%
Others	2.1%	2.3%	0.0%	1.2%	1.4%
<u>Annual household income level</u>					
Less than €25,000	10.7%	8.5%	9.8%	7.2%	9.0%
€25,000 - €49,999	40.7%	51.3%	37.1%	44.7%	43.5%
€50,000 - €74,999	29.0%	26.6%	33.2%	33.9%	30.8%
More than €74,999	0.0%	0.0%	0.0%	0.0%	0.0%
<u>Education level</u>					
No studies	0.2%	0.1%	0.3%	1.6%	0.6%
Primary education	0.3%	2.6%	0.8%	2.4%	1.6%
Secondary education	25.6%	36.5%	30.7%	36.1%	32.4%
Higher education	73.9%	60.8%	68.2%	59.9%	65.4%

How many islands do they visit during their trip?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
One island	87.5%	97.1%	92.5%	93.4%	92.6%
Two islands	10.4%	1.0%	6.7%	5.8%	6.0%
Three or more islands	2.1%	1.8%	0.8%	0.8%	1.4%

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2023Q1	2023Q2	2023Q3	2023Q4	2023
Average rating	8.62	8.77	8.64	8.68	8.68
<u>Experience in the Canary Islands</u>					
Worse or much worse than expected	2.1%	0.7%	4.2%	4.1%	2.8%
Lived up to expectations	62.1%	65.5%	55.0%	58.9%	60.3%
Better or much better than expected	35.8%	33.7%	40.8%	37.0%	36.8%
<u>Future intentions (scale 1-10)</u>					
Return to the Canary Islands	8.67	8.64	8.52	8.53	8.59
Recommend visiting the Canary Islands	8.76	8.86	8.69	8.75	8.77

Who do they come with?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Unaccompanied	7.6%	8.5%	6.3%	11.2%	8.6%
Only with partner	51.0%	61.5%	47.0%	49.0%	51.9%
Only with children (< 13 years old)	3.4%	2.1%	5.0%	3.7%	3.6%
Partner + children (< 13 years old)	8.3%	3.9%	6.1%	5.2%	5.9%
Other relatives	7.2%	5.9%	8.6%	7.9%	7.4%
Friends	5.6%	6.8%	3.8%	5.8%	5.5%
Work colleagues	0.0%	0.0%	0.0%	0.1%	0.0%
Organized trip	0.0%	0.6%	0.0%	0.3%	0.2%
Other combinations (2) (2) Combination of some of the groups previously analyzed	16.9%	10.6%	23.2%	16.8%	16.9%
<u>Tourists with children</u>					
- Between 0 and 2 years old	1.3%	0.7%	2.6%	0.6%	1.3%
- Between 3 and 12 years old	15.1%	6.6%	12.1%	10.4%	11.1%
- Between 0 - 2 and 3-12 years old	1.7%	0.0%	0.3%	1.9%	1.0%
<u>Tourists without children</u>					
<u>Group composition:</u>					
- 1 person	9.5%	12.4%	7.7%	14.6%	11.2%
- 2 people	56.4%	69.5%	60.2%	56.1%	60.2%
- 3 people	10.4%	10.5%	15.9%	11.1%	11.9%
- 4 or 5 people	19.1%	6.5%	12.6%	15.1%	13.5%
- 6 or more people	4.6%	1.1%	3.6%	3.2%	3.1%
<u>Average group size:</u>					
	2.72	2.16	2.51	2.51	2.48

*People who share the main expenses of the trip