

TOURIST PROFILE BY ISLAND OF STAY (2022)

POLAND

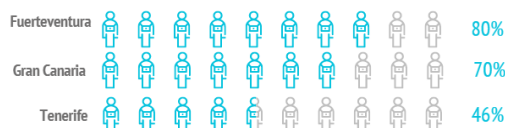
How many are they and how much do they spend?



| | LZ | FUE | GC | TFE | LP |
|---|---------------|---------------|---------------|---------------|-------------|
| TOURISTS | | | | | |
| Tourist arrivals (FRONTUR) | n.a. | n.a. | n.a. | n.a. | n.a. |
| Tourist arrivals > 15 years old (EGT) | 15,266 | 75,239 | 58,857 | 97,849 | 967 |
| - book holiday package | 8,809 | 60,153 | 41,117 | 45,467 | 0 |
| - do not book holiday package | 6,457 | 15,086 | 17,739 | 52,382 | 967 |
| - % tourists who book holiday package | 57.7% | 79.9% | 69.9% | 46.5% | 0.0% |



% TOURISTS WHO BOOK HOLIDAY PACKAGE



| | LZ | FUE | GC | TFE | LP |
|--|----|--------------|--------------|--------------|----|
| Expenditure per tourist (€) | -- | 1,129 | 1,290 | 1,140 | -- |
| - book holiday package | -- | 1,163 | 1,440 | 1,346 | -- |
| - holiday package | -- | 998 | 1,222 | 1,072 | -- |
| - others | -- | 164 | 218 | 274 | -- |
| - do not book holiday package | -- | 995 | 941 | 962 | -- |
| - flight | -- | 295 | 257 | 281 | -- |
| - accommodation | -- | 454 | 295 | 290 | -- |
| - others | -- | 246 | 389 | 391 | -- |
| Average lenght of stay | -- | 8.17 | 8.44 | 8.44 | -- |
| - book holiday package | -- | 7.85 | 7.75 | 7.87 | -- |
| - do not book holiday package | -- | 9.41 | 10.04 | 8.93 | -- |
| Average daily expenditure (€) | -- | 144.9 | 163.8 | 143.9 | -- |
| - book holiday package | -- | 152.7 | 189.6 | 177.2 | -- |
| - do not book holiday package | -- | 114.1 | 103.7 | 114.9 | -- |
| Total turnover (> 15 years old) (€m) | -- | 85 | 76 | 112 | -- |
| - book holiday package | -- | 70 | 59 | 61 | -- |
| - do not book holiday package | -- | 15 | 17 | 50 | -- |

Where did they spend their main holiday last year?*

| | LZ | FUE | GC | TFE | LP |
|----------------------|----|-------|-------|-------|----|
| Didn't have holidays | -- | 19.1% | 15.3% | 20.4% | -- |
| Canary Islands | -- | 15.3% | 22.0% | 10.5% | -- |
| Other destination | -- | 65.6% | 62.7% | 69.1% | -- |

What other destinations did they consider for this trip?*

| | LZ | FUE | GC | TFE | LP |
|---|----|-------|-------|-------|----|
| None (I was clear about "this Canary Island") | -- | 6.1% | 7.1% | 8.5% | -- |
| Canary Islands (other island) | -- | 22.6% | 26.4% | 23.3% | -- |
| Other destination | -- | 71.2% | 66.5% | 68.1% | -- |

*Percentage of valid answers

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.

Importance of each factor in the destination choice

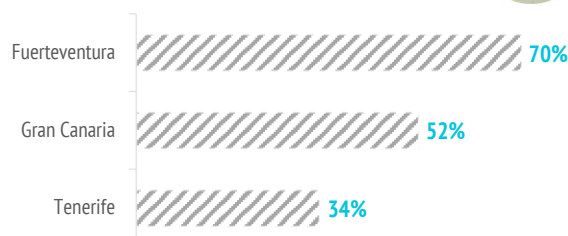


| | LZ | FUE | GC | TFE | LP |
|----------------------|----|-------|-------|-------|----|
| Climate | -- | 75.4% | 81.5% | 73.9% | -- |
| Landscapes | -- | 62.2% | 61.7% | 65.9% | -- |
| Safety | -- | 70.6% | 58.8% | 58.0% | -- |
| Sea | -- | 71.8% | 52.7% | 49.4% | -- |
| Tranquility | -- | 62.2% | 53.1% | 47.9% | -- |
| European belonging | -- | 51.2% | 56.0% | 50.3% | -- |
| Beaches | -- | 70.3% | 51.6% | 33.7% | -- |
| Environment | -- | 39.4% | 47.7% | 56.4% | -- |
| Accommodation supply | -- | 51.3% | 48.8% | 34.4% | -- |
| Authenticity | -- | 40.3% | 41.7% | 39.6% | -- |
| Price | -- | 44.0% | 33.6% | 35.6% | -- |
| Gastronomy | -- | 43.7% | 39.0% | 25.9% | -- |
| Effortless trip | -- | 37.2% | 35.4% | 31.6% | -- |
| Exoticism | -- | 31.4% | 31.6% | 31.0% | -- |
| Hiking trail network | -- | 11.8% | 16.5% | 22.9% | -- |
| Fun possibilities | -- | 13.4% | 19.3% | 13.5% | -- |
| Culture | -- | 8.9% | 11.5% | 6.7% | -- |
| Historical heritage | -- | 7.7% | 11.4% | 6.5% | -- |
| Nightlife | -- | 6.6% | 9.9% | 4.3% | -- |
| Shopping | -- | 4.5% | 6.9% | 6.6% | -- |

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.

% TOURISTS WHO CHOOSE BEACHES



What is the main motivation for their holidays?



| | LZ | FUE | GC | TFE | LP |
|-------------------------|----|-------|-------|-------|----|
| Rest | -- | 59.9% | 60.9% | 38.6% | -- |
| Enjoy family time | -- | 4.2% | 7.0% | 7.3% | -- |
| Have fun | -- | 1.2% | 3.4% | 2.5% | -- |
| Explore the destination | -- | 33.4% | 26.9% | 49.2% | -- |
| Practice their hobbies | -- | 0.2% | 0.5% | 0.3% | -- |
| Other reasons | -- | 1.2% | 1.4% | 2.0% | -- |

How far in advance do they book their trip?



| | LZ | FUE | GC | TFE | LP |
|------------------------|----|-------|-------|-------|----|
| The same day | -- | 0.5% | 1.3% | - | -- |
| Between 1 and 30 days | -- | 36.1% | 41.3% | 41.8% | -- |
| Between 1 and 2 months | -- | 31.1% | 28.6% | 26.9% | -- |
| Between 3 and 6 months | -- | 20.0% | 20.6% | 19.7% | -- |
| More than 6 months | -- | 12.3% | 8.3% | 11.6% | -- |

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POLAND



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

| | LZ | FUE | GC | TFE | LP |
|---------------------------------------|----|-------|-------|-------|----|
| Previous visits to the Canary Islands | -- | 34.1% | 49.0% | 33.6% | -- |
| Friends or relatives | -- | 21.3% | 23.9% | 29.2% | -- |
| Internet or social media | -- | 64.3% | 62.1% | 67.4% | -- |
| Mass Media | -- | 6.1% | 2.3% | 1.8% | -- |
| Travel guides and magazines | -- | 13.4% | 12.4% | 13.2% | -- |
| Travel Blogs or Forums | -- | 17.9% | 13.6% | 24.8% | -- |
| Travel TV Channels | -- | 2.6% | 1.4% | 2.1% | -- |
| Tour Operator or Travel Agency | -- | 41.2% | 32.6% | 22.5% | -- |
| Public administrations or similar | -- | 0.6% | 0.8% | 0.5% | -- |
| Others | -- | 2.9% | 2.0% | 2.1% | -- |

* Multi-choice question

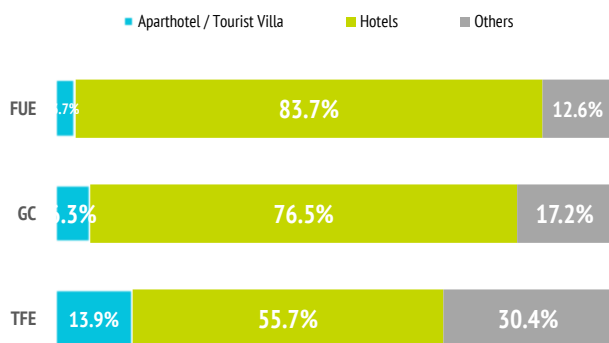
With whom did they book their flight and accommodation?

| | LZ | FUE | GC | TFE | LP |
|-----------------------------------|----|-------|-------|-------|----|
| Flight | | | | | |
| - Directly with the airline | -- | 17.1% | 23.7% | 44.8% | -- |
| - Tour Operator or Travel Agency | -- | 82.9% | 76.3% | 55.2% | -- |
| Accommodation | | | | | |
| - Directly with the accommodation | -- | 9.4% | 16.1% | 33.9% | -- |
| - Tour Operator or Travel Agency | -- | 90.6% | 83.9% | 66.1% | -- |

Where do they stay?

| | LZ | FUE | GC | TFE | LP |
|---|----|-------|-------|-------|----|
| 1-2-3* Hotel | -- | 18.5% | 22.1% | 11.3% | -- |
| 4* Hotel | -- | 62.3% | 48.8% | 40.9% | -- |
| 5* Hotel / 5* Luxury Hotel | -- | 2.9% | 5.6% | 3.5% | -- |
| Aparthotel / Tourist Villa | -- | 3.7% | 6.3% | 13.9% | -- |
| House/room rented in a private dwelling | -- | 3.5% | 4.1% | 8.9% | -- |
| Private accommodation (1) | -- | 2.5% | 5.9% | 7.9% | -- |
| Others (Cottage, cruise, camping,...) | -- | 6.6% | 7.2% | 13.6% | -- |

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



What do they book?

| | LZ | FUE | GC | TFE | LP |
|-------------------|----|-------|-------|-------|----|
| Room only | -- | 8.6% | 17.6% | 31.4% | -- |
| Bed and Breakfast | -- | 2.8% | 5.5% | 7.9% | -- |
| Half board | -- | 6.2% | 12.7% | 20.2% | -- |
| Full board | -- | 0.9% | 2.7% | 1.2% | -- |
| All inclusive | -- | 81.4% | 61.5% | 39.3% | -- |

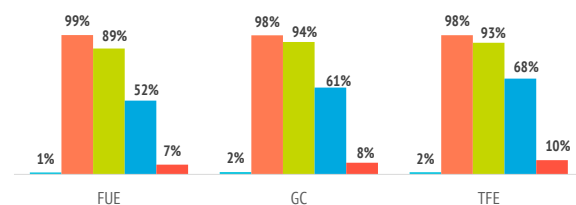
Other expenses

| | LZ | FUE | GC | TFE | LP |
|-----------------------------------|----|-------|-------|-------|----|
| Restaurants or cafes | -- | 34.2% | 46.9% | 67.9% | -- |
| Supermarkets | -- | 40.9% | 53.3% | 65.7% | -- |
| Car rental | -- | 33.2% | 35.6% | 53.2% | -- |
| Organized excursions | -- | 30.3% | 28.3% | 44.2% | -- |
| Taxi, transfer, chauffeur service | -- | 68.4% | 61.8% | 50.0% | -- |
| Theme Parks | -- | 4.5% | 8.8% | 26.4% | -- |
| Sport activities | -- | 3.4% | 3.6% | 9.1% | -- |
| Museums | -- | 3.0% | 6.3% | 4.4% | -- |
| Flights between islands | -- | 8.8% | 3.3% | 8.9% | -- |

Activities in the Canary Islands

| | LZ | FUE | GC | TFE | LP |
|-----------------------------|----|-------|-------|-------|----|
| Outdoor time per day | | | | | |
| 0 hours | -- | 1.4% | 1.6% | 1.5% | -- |
| 1 - 2 hours | -- | 9.6% | 4.7% | 5.3% | -- |
| 3 - 6 hours | -- | 36.9% | 32.2% | 25.4% | -- |
| 7 - 12 hours | -- | 45.3% | 53.2% | 57.7% | -- |
| More than 12 hours | -- | 6.9% | 8.3% | 10.1% | -- |

■ 0 hours
 ■ More than 1 hour
 ■ More than 3 hours
 ■ More than 7 hours
 ■ More than 12 hours



| Activities in the Canary Islands | LZ | FUE | GC | TFE | LP |
|------------------------------------|----|-------|-------|-------|----|
| Beach | -- | 92.8% | 85.2% | 85.4% | -- |
| Walk, wander | -- | 81.0% | 78.0% | 85.3% | -- |
| Explore the island on their own | -- | 59.7% | 66.3% | 76.5% | -- |
| Swimming pool, hotel facilities | -- | 64.7% | 58.2% | 57.0% | -- |
| Hiking | -- | 32.5% | 29.3% | 40.7% | -- |
| Organized excursions | -- | 36.4% | 25.6% | 35.9% | -- |
| Taste Canarian gastronomy | -- | 25.3% | 28.8% | 38.6% | -- |
| Theme parks | -- | 9.1% | 15.7% | 34.4% | -- |
| Sea excursions / whale watching | -- | 14.1% | 7.2% | 20.1% | -- |
| Swim | -- | 17.4% | 10.7% | 14.4% | -- |
| Wineries / markets / popular festi | -- | 9.8% | 10.6% | 9.8% | -- |
| Museums / exhibitions | -- | 7.5% | 13.2% | 9.9% | -- |
| Running | -- | 9.0% | 7.4% | 7.4% | -- |
| Other Nature Activities | -- | 4.8% | 6.0% | 11.3% | -- |
| Nightlife / concerts / shows | -- | 10.3% | 10.2% | 5.3% | -- |
| Practice other sports | -- | 6.4% | 6.2% | 7.7% | -- |
| Astronomical observation | -- | 3.6% | 1.6% | 5.2% | -- |
| Cycling / Mountain bike | -- | 2.6% | 2.8% | 3.1% | -- |
| Scuba Diving | -- | 0.7% | 6.1% | 3.0% | -- |
| Surf | -- | 2.9% | 1.7% | 3.1% | -- |
| Windsurf / Kitesurf | -- | 2.5% | 0.6% | 0.1% | -- |
| Beauty and health treatments | -- | 1.1% | 1.2% | 0.7% | -- |
| Golf | -- | 0.9% | 1.7% | 0.0% | -- |

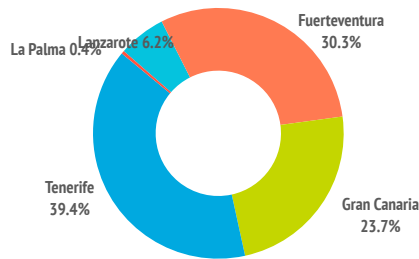
* Multi-choice question

TOURIST PROFILE BY ISLAND OF STAY (2022)

POLAND



Which island do they choose?



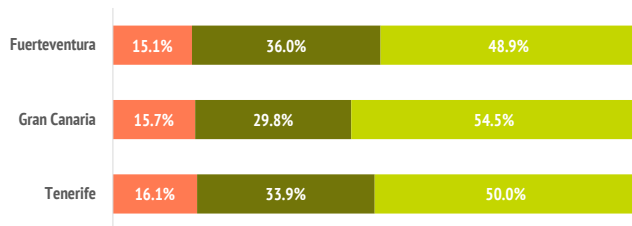
How many islands do they visit during their trip?

| | LZ | FUE | GC | TFE | LP |
|-----------------------|----|-------|-------|-------|----|
| One island | -- | 77.0% | 89.1% | 88.8% | -- |
| Two islands | -- | 21.4% | 9.7% | 8.9% | -- |
| Three or more islands | -- | 1.6% | 1.2% | 2.3% | -- |

Sustainable destination

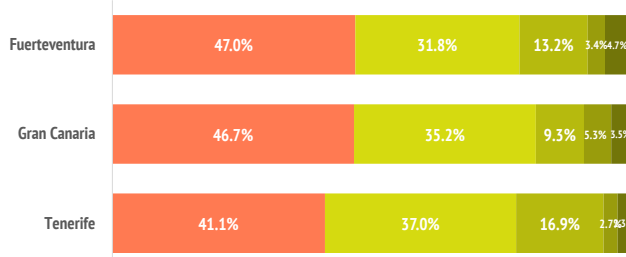
When booking a trip, do they tend to choose the most sustainable options?

■ No
 ■ Yes, even if it means some inconvenience (price, time, hassle, etc)
 ■ Yes, but only if it is not inconvenient



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

■ No
 ■ Yes, up to 5% more
 ■ Yes, up to 10% more
 ■ Yes, up to 20% more
 ■ Yes, over 20% more



| Perception during their stay* | LZ | FUE | GC | TFE | LP |
|--|----|------|------|------|----|
| Quality of life on the island | -- | 7.66 | 7.98 | 7.92 | -- |
| Tolerance towards tourism | -- | 9.00 | 8.81 | 8.66 | -- |
| Cleanliness of the island | -- | 8.56 | 8.36 | 8.54 | -- |
| Air quality | -- | 9.08 | 8.50 | 8.86 | -- |
| Rational water consumption | -- | 7.68 | 7.25 | 7.36 | -- |
| Energy saving | -- | 7.18 | 6.89 | 7.02 | -- |
| Use of renewable energy | -- | 7.48 | 7.51 | 6.95 | -- |
| Recycling | -- | 7.49 | 7.41 | 7.14 | -- |
| Easy to get around by public transport | -- | 7.44 | 7.89 | 7.69 | -- |
| Overcrowding in tourist areas | -- | 6.86 | 6.96 | 7.27 | -- |
| Supply of local products | -- | 7.39 | 7.48 | 7.68 | -- |

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

Which is the most visited place on each island?

FUERTEVENTURA



53% PLAYAS DE JANDÍA

TENERIFE



69% PARQUE NACIONAL DEL TEIDE

GRAN CANARIA



77% DUNAS DE MASPALOMAS

The data refers to % of tourists on each island who have visited the place.

How do they rate the Canary Islands?

| Satisfaction (scale 0-10) | LZ | FUE | GC | TFE | LP |
|---------------------------|----|------|------|------|----|
| Average rating | -- | 9.27 | 9.25 | 9.23 | -- |

| Experience in the Canary Islands | LZ | FUE | GC | TFE | LP |
|-------------------------------------|----|-------|-------|-------|----|
| Worse or much worse than expected | -- | 3.6% | 3.1% | 2.3% | -- |
| Lived up to expectations | -- | 44.7% | 56.3% | 49.1% | -- |
| Better or much better than expected | -- | 51.7% | 40.6% | 48.6% | -- |

| Future intentions (scale 1-10) | LZ | FUE | GC | TFE | LP |
|---------------------------------------|----|------|------|------|----|
| Return to the Canary Islands | -- | 8.63 | 8.73 | 8.85 | -- |
| Recommend visiting the Canary Islands | -- | 9.18 | 9.26 | 9.40 | -- |

How many are loyal to the Canary Islands?

| | LZ | FUE | GC | TFE | LP |
|-------------------------------|----|-------|-------|-------|----|
| Repeat tourists of the island | -- | 45.5% | 57.8% | 42.5% | -- |
| At least 10 previous visits | -- | 1.3% | 4.3% | 2.9% | -- |
| Repeat tourists | -- | 48.5% | 65.2% | 47.4% | -- |
| At least 10 previous visits | -- | 3.7% | 8.4% | 5.7% | -- |

REPEAT TOURIST OF EACH ISLAND



45.5%
Fuerteventura



57.8%
Gran Canaria



42.5%
Tenerife

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POLAND

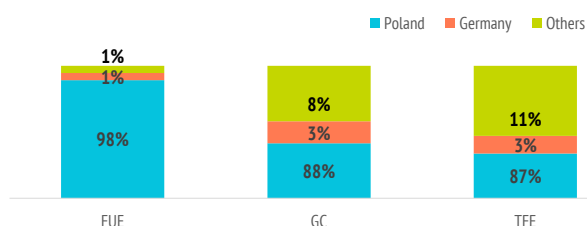


Where does the flight come from?



| | LZ | FUE | GC | TFE | LP |
|----------------|----|-------|-------|-------|----|
| Poland | -- | 97.8% | 88.3% | 86.8% | -- |
| Germany | -- | 1.1% | 3.3% | 2.7% | -- |
| Mainland Spain | -- | -- | 0.7% | 6.4% | -- |
| United Kingdom | -- | -- | 2.9% | 0.9% | -- |
| Denmark | -- | -- | 0.3% | 1.4% | -- |
| Austria | -- | 0.6% | 1.9% | -- | -- |
| Portugal | -- | -- | 0.6% | 0.8% | -- |

SHARE OF TOURIST BY ORIGIN OF THE FLIGHT



Who do they come with?



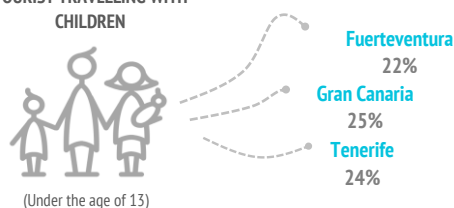
| | LZ | FUE | GC | TFE | LP |
|-------------------------------------|----|-------|-------|-------|----|
| Unaccompanied | -- | 4.7% | 8.5% | 4.5% | -- |
| Only with partner | -- | 46.3% | 45.8% | 45.6% | -- |
| Only with children (< 13 years old) | -- | 5.7% | 5.1% | 6.3% | -- |
| Partner + children (< 13 years old) | -- | 6.6% | 10.0% | 10.4% | -- |
| Other relatives | -- | 12.3% | 7.5% | 13.5% | -- |
| Friends | -- | 4.5% | 7.3% | 6.8% | -- |
| Work colleagues | -- | 0.5% | 0.4% | 0.8% | -- |
| Organized trip | -- | 0.3% | 1.4% | 0.7% | -- |
| Other combinations ⁽¹⁾ | -- | 19.2% | 14.1% | 11.4% | -- |

(1) Different situations have been isolated

| | | | | | |
|----------------------------------|----|--------------|--------------|--------------|----|
| Tourists with children | -- | 21.9% | 24.9% | 23.6% | -- |
| - Between 0 and 2 years old | -- | 2.7% | 3.3% | 0.7% | -- |
| - Between 3 and 12 years old | -- | 18.3% | 20.5% | 22.4% | -- |
| - Between 0-2 and 3-12 years | -- | 0.9% | 1.1% | 0.6% | -- |
| Tourists without children | -- | 78.1% | 75.1% | 76.4% | -- |
| Group composition: | | | | | |
| - 1 person | -- | 7.0% | 11.4% | 6.5% | -- |
| - 2 people | -- | 52.4% | 49.1% | 52.2% | -- |
| - 3 people | -- | 14.8% | 17.1% | 17.6% | -- |
| - 4 or 5 people | -- | 18.4% | 18.1% | 21.1% | -- |
| - 6 or more people | -- | 7.4% | 4.4% | 2.7% | -- |
| Average group size: | -- | 2.85 | 2.69 | 2.69 | -- |

*People who share the main expenses of the trip

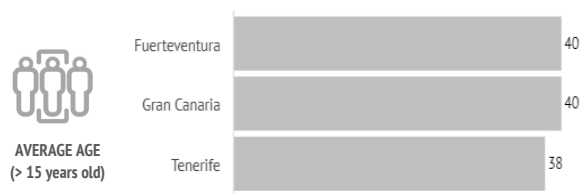
TOURIST TRAVELLING WITH CHILDREN



Who are they?



| | LZ | FUE | GC | TFE | LP |
|--------------------------------------|----|-------|-------|-------|----|
| Gender | | | | | |
| Men | -- | 58.5% | 49.3% | 42.7% | -- |
| Women | -- | 41.5% | 50.7% | 57.3% | -- |
| Age | | | | | |
| Average age (tourist > 15 years old) | -- | 40.5 | 40.1 | 38.0 | -- |
| Standard deviation | -- | 13.7 | 12.9 | 12.0 | -- |
| Age range (> 15 years old) | | | | | |
| 16 - 24 years old | -- | 10.3% | 10.3% | 10.3% | -- |
| 25 - 30 years old | -- | 16.9% | 13.8% | 22.1% | -- |
| 31 - 45 years old | -- | 41.8% | 48.5% | 43.1% | -- |
| 46 - 60 years old | -- | 19.4% | 16.4% | 18.4% | -- |
| Over 60 years old | -- | 11.6% | 11.0% | 6.1% | -- |
| Occupation | | | | | |
| Salaried worker | -- | 43.6% | 32.7% | 45.8% | -- |
| Self-employed | -- | 24.2% | 33.6% | 27.5% | -- |
| Unemployed | -- | 0.8% | 2.2% | 2.1% | -- |
| Business owner | -- | 18.5% | 20.2% | 14.8% | -- |
| Student | -- | 5.0% | 4.4% | 5.4% | -- |
| Retired | -- | 7.0% | 6.4% | 4.0% | -- |
| Unpaid domestic work | -- | 0.4% | 0.3% | 0.0% | -- |
| Others | -- | 0.4% | 0.0% | 0.4% | -- |
| Annual household income level | | | | | |
| Less than €25,000 | -- | 37.0% | 32.0% | 30.1% | -- |
| €25,000 - €49,999 | -- | 37.8% | 35.7% | 40.3% | -- |
| €50,000 - €74,999 | -- | 15.2% | 21.8% | 19.9% | -- |
| More than €74,999 | -- | 10.0% | 10.5% | 9.8% | -- |
| Education level | | | | | |
| No studies | -- | 0.0% | 0.2% | 0.5% | -- |
| Primary education | -- | 0.0% | 0.6% | 2.9% | -- |
| Secondary education | -- | 16.6% | 23.8% | 13.7% | -- |
| Higher education | -- | 83.4% | 75.4% | 82.8% | -- |



% OF TOURISTS WITH INCOMES UNDER €25,000

● Fuerteventura ● Gran Canaria ● Tenerife



% OF TOURISTS TRAVELING WITH CHILDREN UNDER THE AGE OF 13



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.