

## Tourist profile trend (2015)

### Canary Islands: Polish



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



	2011	2012	2013	2014	2015
Tourist arrivals (> 16 years old)	136,015	141,656	--	148,274	193,622
Average daily expenditure (€)	119.04	119.15	--	115.31	114.64
. in their place of residence	87.15	87.23	--	85.82	85.08
. in the Canary Islands	31.88	31.92	--	29.49	29.56
Average length of stay	8.81	8.70	--	8.34	8.27
Turnover per tourist (€)	1,000	1,005	--	926	915
Total turnover (> 16 years old) (€m)	136	142	--	137	177
Year on year variation of turnover	--	4.7%	--	--	29.1%
Year on year variation of tourist	--	4.1%	--	--	30.6%

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

<b>Accommodation (*):</b>	21.22	21.00	--	12.05	21.14
- Accommodation	18.61	14.27	--	10.67	20.38
- Additional accommodation expenses	2.61	6.73	--	1.38	0.76
<b>Transport:</b>	35.59	26.83	--	24.00	27.55
- Public transport	9.49	5.56	--	5.72	5.23
- Taxi	5.21	3.14	--	2.39	2.75
- Car rental	20.88	18.13	--	15.89	19.56
<b>Food and drink:</b>	55.20	55.07	--	54.43	54.07
- Food purchases at supermarkets	30.14	22.94	--	28.48	25.04
- Restaurants	25.06	32.13	--	25.95	29.02
<b>Souvenirs:</b>	63.47	80.87	--	75.15	73.72
<b>Leisure:</b>	72.52	60.07	--	63.24	59.58
- Organized excursions	42.30	36.18	--	37.12	32.30
- Leisure, amusement	12.27	6.18	--	10.33	8.37
- Trip to other islands	6.90	5.65	--	4.03	7.17
- Sporting activities	6.67	7.78	--	8.45	6.02
- Cultural activities	1.27	0.75	--	1.06	1.02
- Discos and disco-pubs	3.10	3.54	--	2.24	4.70
<b>Others:</b>	19.35	15.68	--	8.62	7.50
- Wellness	1.89	1.52	--	0.90	1.18
- Medical expenses	0.96	1.36	--	0.20	1.00
- Other expenses	16.49	12.80	--	7.51	5.32

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



	2011	2012	2013	2014	2015
The same day they leave	0.7%	0.6%	--	1.8%	2.1%
Between 2 and 7 days	23.9%	22.6%	--	31.6%	28.9%
Between 8 and 15 days	24.0%	13.3%	--	15.6%	14.9%
Between 16 and 30 days	20.0%	16.0%	--	15.8%	14.7%
Between 31 and 90 days	14.9%	23.8%	--	18.8%	22.5%
More than 90 days	16.4%	23.7%	--	16.4%	17.0%

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



	2011	2012	2013	2014	2015
Flight only	3.7%	1.7%	--	2.5%	2.7%
Flight and accommodation (room only)	3.8%	3.6%	--	3.3%	7.7%
Flight and accommodation (B&B)	2.7%	2.0%	--	1.6%	2.6%
Flight and accommodation (half board)	4.1%	3.0%	--	3.9%	4.6%
Flight and accommodation (full board)	15.1%	16.2%	--	12.4%	9.3%
Flight and accommodation (all inclusive)	70.6%	73.5%	--	76.4%	73.0%
<b>% Tourists using low-cost airlines</b>	43.8%	40.4%	--	38.1%	50.0%
<b>Other expenses in their place of residence:</b>					
- Car rental	6.0%	3.3%	--	4.7%	10.2%
- Sporting activities	5.3%	3.7%	--	3.9%	7.9%
- Excursions	7.7%	5.2%	--	9.4%	7.8%
- Combined trip to other islands	1.8%	1.7%	--	3.8%	1.9%

(\*) Bear in mind that 97% of Polish tourists in 2015 paid the accommodation before travelling.

#### How do they book?



	2011	2012	2013	2014	2015
<b>Accommodation booking</b>					
<b>Tour Operator</b>	51.7%	60.0%	--	57.4%	50.8%
- Tour Operator's website	34.5%	36.1%	--	36.7%	57.7%
<b>Accommodation</b>	4.6%	3.4%	--	4.3%	9.2%
- Accommodation's website	80.8%	76.1%	--	78.3%	88.2%
<b>Travel agency (High street)</b>	38.0%	31.9%	--	33.6%	32.1%
<b>Online Travel Agency (OTA)</b>	3.7%	3.6%	--	4.3%	6.5%
<b>No need to book accommodation</b>	2.0%	1.2%	--	0.4%	1.3%

#### Flight booking

	2011	2012	2013	2014	2015
<b>Tour Operator</b>	59.3%	59.7%	--	59.4%	51.4%
- Tour Operator's website	34.6%	30.6%	--	36.5%	57.7%
<b>Airline</b>	6.8%	5.5%	--	7.0%	15.2%
- Airline's website	82.8%	85.2%	--	61.4%	84.7%
<b>Travel agency (High street)</b>	30.9%	32.2%	--	30.9%	30.2%
<b>Online Travel Agency (OTA)</b>	3.1%	2.6%	--	2.7%	3.2%

#### Where do they stay?



	2011	2012	2013	2014	2015
5* Hotel	5.8%	6.0%	--	2.3%	2.9%
4* Hotel	62.5%	57.1%	--	64.0%	60.8%
1-2-3* Hotel	19.7%	26.7%	--	24.6%	21.2%
Apartment	9.4%	8.9%	--	8.0%	12.3%
Property (privately-owned, friends, family)	1.2%	0.5%	--	0.7%	1.4%
Others	1.4%	0.7%	--	0.3%	1.4%

#### How are they?



	2011	2012	2013	2014	2015
<b>Gender</b>					
Percentage of men	45.7%	50.0%	--	50.0%	51.3%
Percentage of women	54.3%	50.0%	--	50.0%	48.7%

#### Age

Average age (tourists > 16 years old)	36.9	38.4	--	35.7	36.3
Standard deviation	12.3	12.6	--	10.2	11.8

#### Age range

16-24 years old	9.3%	6.6%	--	8.0%	7.5%
25-30 years old	29.6%	29.3%	--	30.6%	33.2%
31-45 years old	40.0%	39.4%	--	45.9%	43.4%
46-60 years old	14.7%	17.0%	--	12.8%	9.8%
Over 60 years old	6.5%	7.6%	--	2.7%	6.0%

#### Occupation

Business owner or self-employed	42.1%	42.9%	--	37.4%	39.5%
Upper/Middle management employee	35.3%	37.1%	--	39.7%	35.1%
Auxiliary level employee	7.3%	9.3%	--	13.3%	11.6%
Students	7.5%	5.2%	--	6.0%	4.9%
Retired	4.6%	4.1%	--	1.1%	6.1%
Unemployed / unpaid dom. work	3.1%	1.3%	--	2.4%	2.8%

#### Annual household income level

€12,000 - €24,000	40.9%	37.7%	--	39.9%	40.9%
€24,001 - €36,000	21.7%	23.0%	--	25.2%	24.2%
€36,001 - €48,000	14.9%	12.7%	--	12.7%	16.5%
€48,001 - €60,000	8.7%	4.5%	--	10.9%	7.4%
€60,001 - €72,000	5.6%	7.1%	--	2.8%	5.7%
€72,001 - €84,000	2.4%	3.2%	--	1.9%	2.6%
More than €84,000	5.9%	11.8%	--	6.5%	2.8%

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### Which island do they choose?



Tourists (> 16 years old)	2011	2012	2013	2014	2015
- Lanzarote	13,307	13,430	--	25,144	35,600
- Fuerteventura	37,125	52,218	--	51,549	62,173
- Gran Canaria	37,126	27,081	--	21,792	27,223
- Tenerife	47,902	48,805	--	49,326	68,181
- La Palma	160	122	--	132	0

Share (%)	2011	2012	2013	2014	2015
- Lanzarote	9.8%	9.5%	--	17.0%	18.4%
- Fuerteventura	27.4%	36.9%	--	34.8%	32.2%
- Gran Canaria	27.4%	19.1%	--	14.7%	14.1%
- Tenerife	35.3%	34.5%	--	33.3%	35.3%
- La Palma	0.1%	0.1%	--	0.1%	0.0%

### Who do they come with?



	2011	2012	2013	2014	2015
Unaccompanied	3.9%	5.1%	--	5.3%	5.6%
Only with partner	49.5%	47.2%	--	53.0%	50.5%
Only with children (under the age of 13)	1.5%	1.7%	--	1.8%	1.5%
Partner + children (under the age of 13)	12.4%	17.9%	--	12.9%	14.5%
Other relatives	6.2%	6.1%	--	5.1%	6.3%
Friends	8.6%	4.2%	--	6.3%	5.7%
Work colleagues	1.1%	0.7%	--	0.8%	0.7%

### Why do they choose the Canary Islands?



Aspects influencing the choice	2011	2012	2013	2014	2015
Climate/sun	89.7%	89.7%	--	89.1%	87.1%
Scenery	43.6%	34.9%	--	36.9%	42.1%
Tranquillity/rest/relaxation	30.3%	31.8%	--	35.3%	31.4%
Beaches	30.2%	33.5%	--	40.3%	30.2%
Visiting new places	31.7%	31.8%	--	27.8%	26.3%
Security	8.8%	10.9%	--	7.1%	18.4%
Price	8.2%	8.0%	--	9.2%	8.8%
Active tourism	6.1%	7.8%	--	8.6%	7.0%
Quality of the environment	6.8%	6.7%	--	3.4%	6.1%
Theme parks	4.6%	3.2%	--	4.6%	5.3%
Nautical activities	3.2%	3.8%	--	4.1%	4.6%
Suitable destination for children	7.4%	5.9%	--	6.4%	4.3%
Shopping	3.3%	1.9%	--	2.5%	3.7%
Culture	2.2%	1.2%	--	2.2%	2.9%
Nightlife/fun	1.8%	2.6%	--	3.1%	2.4%
Ease of travel	4.0%	3.6%	--	3.1%	2.4%

\* Multi-choice question

### How do they value the destination?



Impression of their stay	2011	2012	2013	2014	2015
Good or very good (% tourists)	96.6%	92.4%	--	96.6%	95.3%
Average rating (scale 1-10)	9.26	8.98	--	9.23	9.20

### How many are loyal to the destination?

Percentage of repeat tourists	2011	2012	2013	2014	2015
Repeat tourists	33.9%	37.9%	--	39.8%	37.9%
In love (more than 10 visits)	1.2%	2.1%	--	1.2%	1.3%

### What did motivate them to come?



Aspects motivating the choice	2011	2012	2013	2014	2015
Previous visits to the Canary Islands	27.2%	31.4%	--	35.3%	31.9%
Recommendation by friends or relatives	33.8%	39.1%	--	33.3%	40.4%
The Canary Islands television channel	0.2%	0.5%	--	0.6%	0.5%
Other television or radio channels	4.9%	3.9%	--	4.4%	5.1%
Information in the press/magazines/books	14.3%	12.1%	--	11.7%	10.3%
Attendance at a tourism fair	1.3%	1.1%	--	0.6%	0.0%
Tour Operator's brochure or catalogue	13.8%	13.9%	--	14.2%	10.9%
Recommendation by Travel Agency	29.4%	25.3%	--	23.3%	19.2%
Information obtained via the Internet	43.5%	38.6%	--	42.2%	44.6%
Senior Tourism programme	0.0%	0.2%	--	0.4%	0.2%
Others	3.1%	4.1%	--	4.2%	3.3%

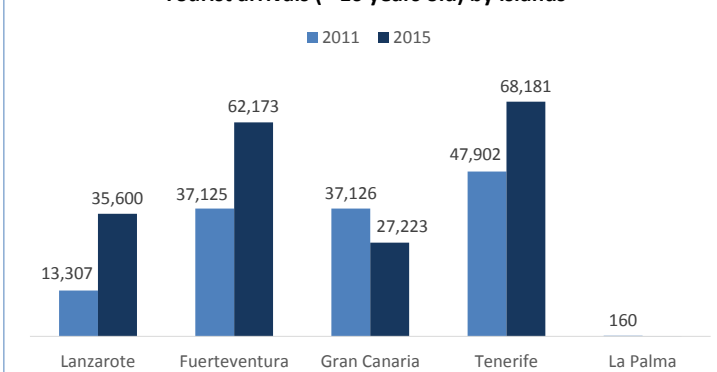
\* Multi-choice question

### Where does the flight come from?

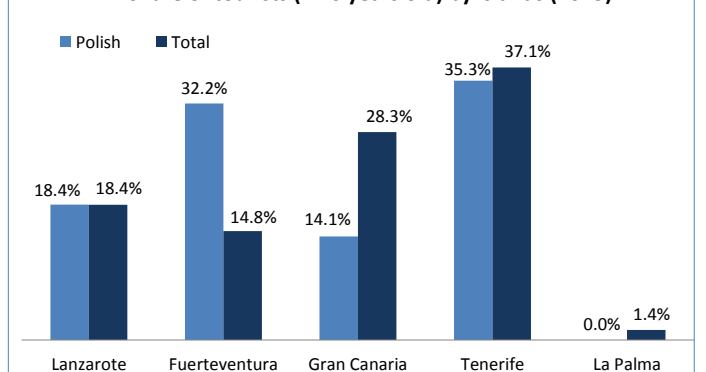


Ten main origin countries	2011	2012	2013	2014	2015
Poland	112,339	125,448	--	133,122	173,569
Germany	11,494	7,937	--	7,480	6,371
United Kingdom	4,615	1,842	--	2,353	5,666
Spain	3,350	2,254	--	2,163	3,978
Ireland	1,320	556	--	1,318	1,298
Austria	0	303	--	350	1,075
Others	876	577	--	0	578
Norway	711	883	--	241	459
Switzerland	326	0	--	789	458
Netherlands	0	0	--	227	170

### Tourist arrivals (> 16 years old) by islands



### Share of tourists (> 16 years old) by islands (2015)



Source: ISTAC (Encuesta sobre el Gasto Turístico). The 2013 data are not shown due to sample failure.

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