

How many are they and how much do they spend?

	Poland	All markets
TOURISTS		
Tourist arrivals (FRONTUR)	n.d.	6,697,165
Tourist arrivals > 15 years old (EGT)	214,755	5,827,892
- book holiday package	136,975	2,549,012
- do not book holiday package	77,780	3,278,880
- % tourists who book holiday package	63.8%	43.7%
Share of total tourist	3.7%	100%

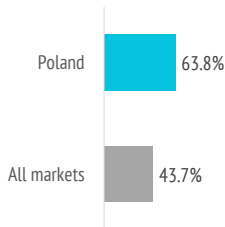
RANKING POSITION BY NUMBER OF TOURISTS



RANKING POSITION BY TURNOVER



% HOLIDAY PACKAGE



50% of Polish travel to Tenerife.

Expenditure per tourist (€)	1,157	1,206
- book holiday package	1,183	1,415
- holiday package	963	1,135
- others	220	280
- do not book holiday package	1,112	1,044
- flight	268	248
- accommodation	374	369
- others	470	427
Average length of stay	8.94	9.54
- book holiday package	7.82	8.59
- do not book holiday package	10.91	10.28
Average daily expenditure (€)	140.9	144.0
- book holiday package	153.7	172.8
- do not book holiday package	118.2	121.6
Total turnover (> 15 years old) (€m)	248	7,028
- book holiday package	162	3,606
- do not book holiday package	86	3,422

Where did they spend their main holiday last year?*

	Poland	All markets
Didn't have holiday	35.3%	35.7%
Canary Islands	13.3%	17.6%
Other destination	51.4%	46.8%

What other destinations do they consider for this trip?*

	Poland	All markets
None	8.6%	29.4%
Canary Islands (other island)	23.5%	25.4%
Other destination	67.9%	45.1%

*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

	Poland	All markets
Climate	80.5%	76.0%
Sea	62.1%	52.0%
Landscapes	61.5%	39.1%
Safety	60.0%	49.0%
European belonging	51.4%	40.2%
Beaches	51.0%	44.6%
Tranquility	49.7%	48.5%
Environment	47.4%	34.7%
Accommodation supply	41.5%	37.8%
Authenticity	36.9%	24.4%
Gastronomy	35.2%	27.9%
Price	34.3%	32.4%
Effortless trip	31.3%	34.9%
Exoticism	30.3%	14.5%
Hiking trail network	12.6%	12.1%
Fun possibilities	11.9%	22.4%
Culture	9.5%	8.7%
Historical heritage	8.7%	9.1%
Nightlife	6.8%	8.4%
Shopping	4.6%	8.8%

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 LANDSCAPES

POLAND
61.5%



ALL MARKETS
39.1%

What is the main motivation for their holidays?

	Poland	All markets
Rest	61.4%	50.7%
Enjoy family time	4.8%	14.0%
Have fun	2.4%	7.3%
Explore the destination	29.7%	23.3%
Practice their hobbies	1.4%	2.6%
Other reasons	0.5%	2.1%



Poland 61.4%

All markets 50.7%

How far in advance do they book their trip?

	Poland	All markets
The same day	1.1%	1.0%
Between 1 and 30 days	54.7%	42.5%
Between 1 and 2 months	24.4%	26.7%
Between 3 and 6 months	11.0%	18.7%
More than 6 months	8.9%	11.1%

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

	Poland	All markets
Previous visits to the Canary Islands	38.3%	45.7%
Friends or relatives	30.3%	30.9%
Internet or social media	68.2%	53.5%
Mass Media	3.1%	2.3%
Travel guides and magazines	12.3%	7.0%
Travel Blogs or Forums	23.6%	8.4%
Travel TV Channels	1.3%	0.5%
Tour Operator or Travel Agency	34.3%	19.4%
Public administrations or similar	1.4%	1.9%
Others	2.1%	2.9%

* Multi-choise question

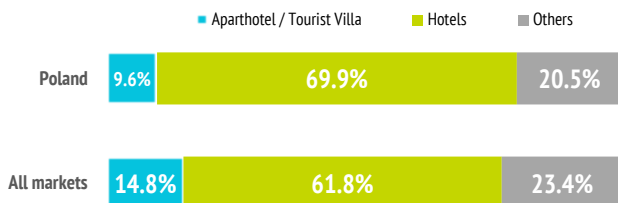
With whom did they book their flight and accommodation?

	Poland	All markets
Flight		
- Directly with the airline	33.2%	52.8%
- Tour Operator or Travel Agency	66.8%	47.2%
Accommodation		
- Directly with the accommodation	25.0%	39.9%
- Tour Operator or Travel Agency	75.0%	60.1%

Where do they stay?

	Poland	All markets
1-2-3* Hotel	15.0%	11.5%
4* Hotel	50.9%	39.4%
5* Hotel / 5* Luxury Hotel	4.0%	10.9%
Aparthotel / Tourist Villa	9.6%	14.8%
House/room rented in a private dwelling	8.5%	6.9%
Private accommodation (1)	3.4%	9.9%
Others (Cottage, cruise, camping,...)	8.6%	6.6%

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



What do they book?

	Poland	All markets
Room only	19.6%	28.1%
Bed and Breakfast	7.1%	15.3%
Half board	14.7%	19.5%
Full board	0.7%	3.2%
All inclusive	57.9%	33.8%

57.9% of Polish book all inclusive.
(Canary Islands: 33.8%)

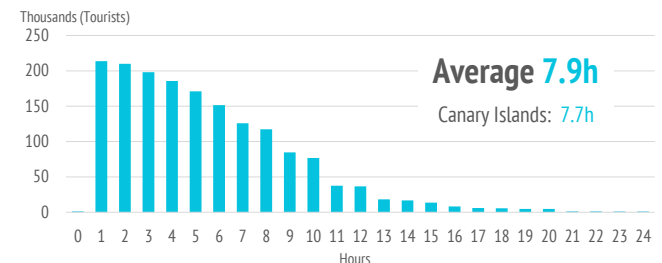
Other expenses

	Poland	All markets
Restaurants or cafes	50.8%	66.9%
Supermarkets	55.4%	55.6%
Car rental	43.8%	37.3%
Organized excursions	38.3%	23.7%
Taxi, transfer, chauffeur service	53.2%	46.0%
Theme Parks	12.9%	8.6%
Sport activities	6.9%	9.3%
Museums	4.4%	4.7%
Flights between islands	8.5%	6.3%

Activities in the Canary Islands

Outdoor time per day	Poland	All markets
0 hours	0.5%	2.4%
1 - 2 hours	7.2%	10.0%
3 - 6 hours	33.7%	30.1%
7 - 12 hours	50.1%	47.1%
More than 12 hours	8.5%	10.5%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



Activities in the Canary Islands	Poland	All markets
Beach	88.3%	75.1%
Walk, wander	79.8%	72.2%
Swimming pool, hotel facilities	62.5%	57.5%
Explore the island on their own	69.0%	52.5%
Swim	40.6%	38.8%
Taste Canarian gastronomy	29.7%	30.2%
Hiking	29.8%	22.5%
Organized excursions	30.5%	16.0%
Sea excursions / whale watching	21.5%	13.5%
Nightlife / concerts / shows	5.6%	12.3%
Theme parks	18.4%	12.2%
Museums / exhibitions	9.4%	10.7%
Wineries / markets / popular festivals	10.1%	10.0%
Other Nature Activities	5.9%	9.5%
Running	8.1%	7.6%
Practice other sports	5.4%	5.9%
Beauty and health treatments	1.8%	5.6%
Surf	4.0%	4.8%
Astronomical observation	4.2%	4.2%
Cycling / Mountain bike	5.3%	4.2%
Scuba Diving	7.0%	4.2%
Golf	0.8%	2.3%
Windsurf / Kitesurf	1.6%	1.5%

* Multi-choise question

Which island do they choose?

Tourists (> 15 years old)	Poland	All markets
Lanzarote	9,143	963,331
Fuerteventura	54,834	843,805
Gran Canaria	40,362	1,545,237
Tenerife	106,919	2,320,313
La Palma	3,237	102,576

How many islands do they visit during their trip?

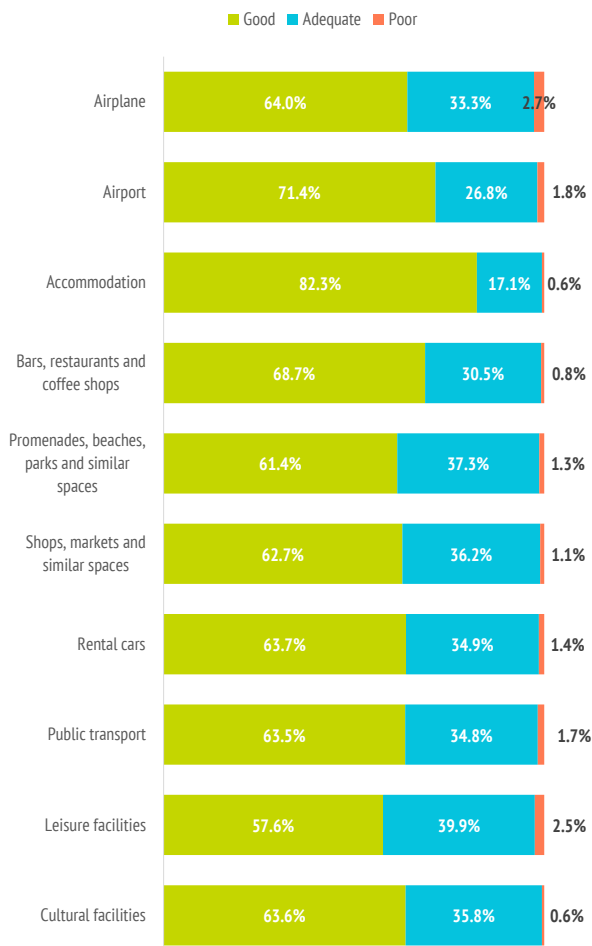
	Poland	All markets
One island	85.3%	90.9%
Two islands	13.6%	7.8%
Three or more islands	1.1%	1.3%

Health safety

Planning the trip: Importance	Poland	All markets
Average rating (scale 0-10)	7.88	7.99

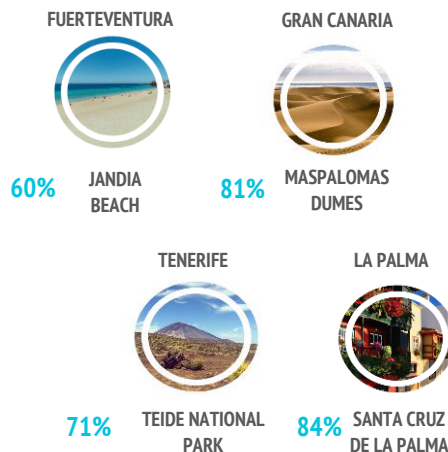
During the stay: Rate	Poland	All markets
Average rating (scale 0-10)	9.09	8.42

HEALTH SAFETY MEASURES (RATE)



Share by islands	Poland	All markets
Lanzarote	4.3%	16.7%
Fuerteventura	25.6%	14.6%
Gran Canaria	18.8%	26.8%
Tenerife	49.8%	40.2%
La Palma	1.5%	1.8%

MOST VISITED PLACES IN EACH ISLAND



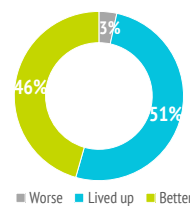
The data refers to % of tourists on each island who have visited the place.

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	Poland	All markets
Average rating	9.09	8.86

Experience in the Canary Islands	Poland	All markets
Worse or much worse than expected	3.4%	2.7%
Lived up to expectations	51.0%	51.4%
Better or much better than expected	45.6%	45.9%

Future intentions (scale 1-10)	Poland	All markets
Return to the Canary Islands	8.63	8.86
Recommend visiting the Canary Island	9.20	9.10



Experience in the Canary Islands

8.63/10

Return to the Canary Islands



9.20/10

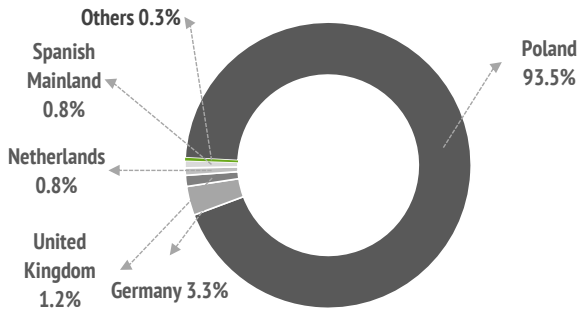
Recommend visiting the Canary Islands

How many are loyal to the Canary Islands?

	Poland	All markets
Repeat tourists	52.6%	68.0%
Repeat tourists (last 5 years)	48.3%	61.9%
Repeat tourists (last 5 years) (5 or more)	6.0%	15.0%
At least 10 previous visits	3.5%	18.3%

Where does the flight come from?

	%	Absolute
Poland	93.5%	200,811
Germany	3.3%	7,048
United Kingdom	1.2%	2,683
Netherlands	0.8%	1,787
Spanish Mainland	0.8%	1,764
Others	0.3%	661



Who do they come with?

	Poland	All markets
Unaccompanied	6.2%	13.5%
Only with partner	48.0%	48.2%
Only with children (< 13 years old)	5.1%	3.9%
Partner + children (< 13 years old)	6.1%	4.9%
Other relatives	11.6%	8.4%
Friends	6.6%	8.5%
Work colleagues	0.7%	0.8%
Organized trip	0.4%	0.2%
Other combinations (1)	15.2%	11.5%

(1) Different situations have been isolated

Tourists with children	20.1%	12.5%
- Between 0 and 2 years old	1.5%	1.2%
- Between 3 and 12 years old	17.1%	10.2%
- Between 0 -2 and 3-12 years	1.5%	1.0%
Tourists without children	79.9%	87.5%
Group composition:		
- 1 person	9.4%	16.5%
- 2 people	56.1%	56.7%
- 3 people	14.6%	10.7%
- 4 or 5 people	18.3%	13.6%
- 6 or more people	1.6%	2.5%
Average group size:	2.54	2.37

*People who share the main expenses of the trip



(Under the age of 13)

20.1% of Polish travel with children.

(Canary Islands: 12.5%)

Who are they?

	Poland	All markets
Gender		
Men	49.3%	49.6%
Women	50.7%	50.4%
Age		
Average age (tourist > 15 years old)	38.1	43.3
Standard deviation	12.0	15.6
Age range (> 15 years old)		
16 - 24 years old	9.8%	11.9%
25 - 30 years old	22.4%	14.8%
31 - 45 years old	44.5%	30.2%
46 - 60 years old	17.7%	26.6%
Over 60 years old	5.6%	16.4%
Occupation		
Salaried worker	43.6%	57.8%
Self-employed	27.5%	11.1%
Unemployed	2.7%	1.7%
Business owner	18.8%	10.0%
Student	4.1%	5.9%
Retired	2.8%	12.2%
Unpaid domestic work	0.5%	0.5%
Others	0.1%	0.9%
Annual household income level		
Less than €25,000	32.1%	16.1%
€25,000 - €49,999	41.5%	37.0%
€50,000 - €74,999	15.5%	23.4%
More than €74,999	10.9%	23.5%
Education level		
No studies	0.1%	2.2%
Primary education	0.4%	2.2%
Secondary education	13.1%	18.8%
Higher education	86.4%	76.9%



5 IN 10 TOURISTS ARE REPEATERS

38 YEARS OLD

AVERAGE AGE

48% ONLY WITH PARTNER



Pictures: Freepik.com