

PROFILE OF TOURIST VISITING THE CANARY ISLANDS (2018)

POLAND

How many are they and how much do they spend?



	Poland	All markets
TOURISTS		
Tourist arrivals (FRONTUR)	n.d.	15,559,787
Tourist arrivals > 15 years old (EGT)	276,948	13,485,651
- book holiday package	221,553	7,848,516
- do not book holiday package	55,395	5,637,135
- % tourists who book holiday package	80.0%	58.2%
Share of total tourist	2.1%	100%

RANKING POSITION BY
NUMBER OF TOURISTS

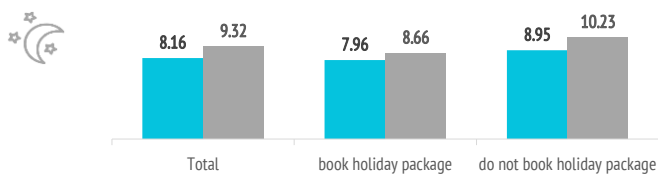
RANKING POSITION BY
TURNOVER



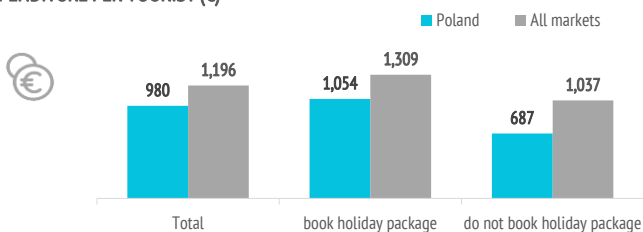
42% of Polish travel
to Tenerife.

	Poland	All markets
Expenditure per tourist (€)	980	1,196
- book holiday package	1,054	1,309
- holiday package	852	1,064
- others	202	246
- do not book holiday package	687	1,037
- flight	188	288
- accommodation	179	350
- others	321	399
Average length of stay	8.16	9.32
- book holiday package	7.96	8.66
- do not book holiday package	8.95	10.23
Average daily expenditure (€)	125.7	143.6
- book holiday package	136.4	159.8
- do not book holiday package	82.8	121.0
Total turnover (> 15 years old) (€m)	272	16,124
- book holiday package	233	10,277
- do not book holiday package	38	5,848

AVERAGE LENGTH OF STAY
(nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



	Poland	All markets
Climate	77.1%	78.1%
Safety	69.1%	51.4%
Landscapes	58.7%	31.6%
Sea	56.6%	43.3%
Tranquility	52.3%	46.2%
European belonging	49.0%	35.8%
Beaches	46.6%	37.1%
Environment	44.9%	30.6%
Accommodation supply	44.8%	41.7%
Price	35.6%	36.5%
Authenticity	35.0%	19.1%
Gastronomy	30.8%	22.6%
Exoticism	30.2%	10.5%
Effortless trip	29.7%	34.8%
Fun possibilities	12.8%	20.7%
Hiking trail network	8.3%	9.0%
Culture	7.3%	7.3%
Historical heritage	6.4%	7.1%
Shopping	5.8%	9.6%
Nightlife	5.6%	7.5%

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
58.7%



ALL MARKETS
31.6%

What is the main motivation for their holidays?



	Poland	All markets
Rest	57.6%	55.1%
Enjoy family time	5.8%	14.7%
Have fun	2.8%	7.8%
Explore the destination	31.4%	18.5%
Practice their hobbies	1.3%	1.8%
Other reasons	1.0%	2.1%

EXPLORE THE
DESTINATION



How far in advance do they book their trip?



	Poland	All markets
The same day	1.9%	0.7%
Between 1 and 30 days	45.3%	23.2%
Between 1 and 2 months	19.2%	23.0%
Between 3 and 6 months	21.2%	32.4%
More than 6 months	12.3%	20.7%

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POLAND



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

	Poland	All markets
Previous visits to the Canary Islands	33.4%	50.9%
Friends or relatives	30.0%	27.8%
Internet or social media	67.6%	56.1%
Mass Media	3.3%	1.7%
Travel guides and magazines	14.5%	9.5%
Travel Blogs or Forums	16.4%	5.4%
Travel TV Channels	1.7%	0.7%
Tour Operator or Travel Agency	40.4%	24.7%
Public administrations or similar	0.5%	0.4%
Others	2.1%	2.3%

* Multi-choice question

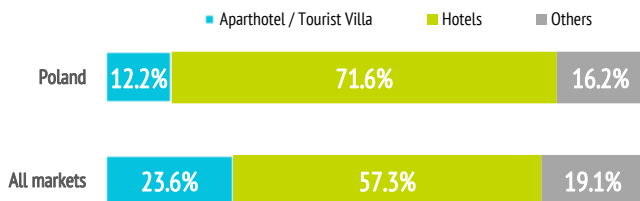
With whom did they book their flight and accommodation? 👁

	Poland	All markets
Flight		
- Directly with the airline	16.9%	39.5%
- Tour Operator or Travel Agency	83.1%	60.5%
Accommodation		
- Directly with the accommodation	12.3%	28.8%
- Tour Operator or Travel Agency	87.7%	71.2%

Where do they stay? 🏠

	Poland	All markets
1-2-3* Hotel	19.5%	12.8%
4* Hotel	50.1%	37.7%
5* Hotel / 5* Luxury Hotel	2.0%	6.8%
Aparthotel / Tourist Villa	12.2%	23.6%
House/room rented in a private dwelling	5.1%	5.3%
Private accommodation (1)	2.5%	7.0%
Others (Cottage, cruise, camping,...)	8.6%	6.8%

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



What do they book? 🍽

	Poland	All markets
Room only	10.5%	28.8%
Bed and Breakfast	2.8%	11.7%
Half board	11.0%	22.4%
Full board	1.2%	3.0%
All inclusive	74.4%	34.1%

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74.4% of Polish book all inclusive.
 (Canary Islands: 34.1%)

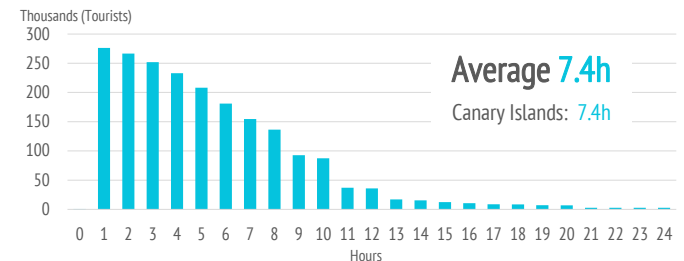
Other expenses 📍

	Poland	All markets
Restaurants or cafes	37.7%	63.2%
Supermarkets	43.7%	55.9%
Car rental	29.2%	26.6%
Organized excursions	38.0%	21.8%
Taxi, transfer, chauffeur service	59.4%	51.7%
Theme Parks	10.8%	8.8%
Sport activities	4.8%	6.4%
Museums	5.5%	5.0%
Flights between islands	6.0%	4.8%

Activities in the Canary Islands 🚶

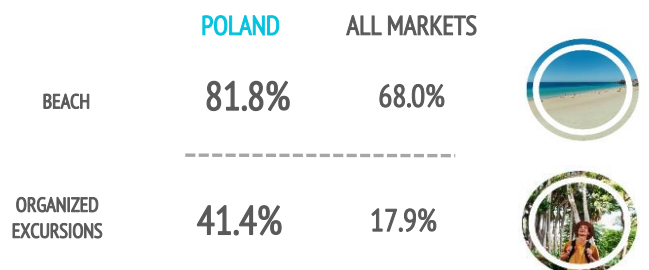
Outdoor time per day	Poland	All markets
0 hours	0.3%	2.2%
1 - 2 hours	8.8%	10.0%
3 - 6 hours	35.1%	32.6%
7 - 12 hours	49.7%	46.5%
More than 12 hours	6.1%	8.7%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



Activities in the Canary Islands	Poland	All markets
Beach	81.8%	68.0%
Walk, wander	76.4%	71.0%
Swimming pool, hotel facilities	64.7%	58.9%
Explore the island on their own	60.1%	46.5%
Organized excursions	41.4%	17.9%
Theme parks	24.9%	15.5%
Taste Canarian gastronomy	23.0%	25.4%
Sea excursions / whale watching	20.8%	11.3%
Sport activities	17.7%	14.3%
Wineries / markets / popular festivals	11.5%	12.0%
Nature activities	11.0%	10.0%
Nightlife / concerts / shows	9.8%	15.5%
Museums / exhibitions	9.2%	9.8%
Activities at sea	9.2%	9.8%
Astronomical observation	2.6%	3.4%
Beauty and health treatments	2.6%	5.7%

* Multi-choice question



Which island do they choose?

Tourists (> 15 years old)	Poland	All markets
Lanzarote	42,761	2,457,120
Fuerteventura	60,469	1,856,705
Gran Canaria	53,098	3,825,110
Tenerife	115,396	4,991,173
La Palma	3,614	249,069

How many islands do they visit during their trip?

	Poland	All markets
One island	82.4%	90.9%
Two islands	15.4%	7.7%
Three or more islands	2.2%	1.4%

Internet usage during their trip

	Poland	All markets
Research		
- Tourist package	23.5%	15.4%
- Flights	14.2%	13.0%
- Accommodation	24.6%	17.7%
- Transport	24.0%	15.6%
- Restaurants	33.1%	27.0%
- Excursions	45.0%	26.3%
- Activities	53.6%	31.0%

	Poland	All markets
Book or purchase		
- Tourist package	36.1%	38.1%
- Flights	43.4%	64.4%
- Accommodation	39.5%	54.5%
- Transport	35.3%	44.7%
- Restaurants	9.4%	10.5%
- Excursions	15.0%	11.4%
- Activities	14.1%	12.5%

* Multi-choice question

Internet usage in the Canary Island	Poland	All markets
Did not use the Internet	9.2%	9.8%
Used the Internet	90.8%	90.2%
- Own Internet connection	51.0%	36.5%
- Free Wifi connection	25.2%	41.1%
Applications*		
- Search for locations or maps	81.5%	60.7%
- Search for destination info	61.2%	44.7%
- Share pictures or trip videos	49.5%	55.6%
- Download tourist apps	8.8%	6.5%
- Others	13.2%	23.9%

* Multi-choice question



81.5% of Polish search for locations or maps during their stay in the Canary Islands

(Canary Islands: 60.7%)



Imagen: Freepik.com

Share by islands	Poland	All markets
Lanzarote	15.5%	18.4%
Fuerteventura	22.0%	13.9%
Gran Canaria	19.3%	28.6%
Tenerife	41.9%	37.3%
La Palma	1.3%	1.9%

MOST VISITED PLACES IN EACH ISLAND



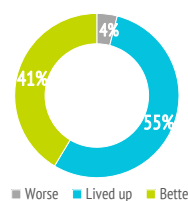
The data refers to % of tourists on each island who have visited the place.

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	Poland	All markets
Average rating	8.81	8.58

Experience in the Canary Islands	Poland	All markets
Worse or much worse than expected	4.0%	2.9%
Lived up to expectations	54.6%	57.4%
Better or much better than expected	41.4%	39.7%

Future intentions (scale 1-10)	Poland	All markets
Return to the Canary Islands	8.44	8.60
Recommend visiting the Canary Island	9.03	8.86



Experience in the Canary Islands



Return to the Canary Islands



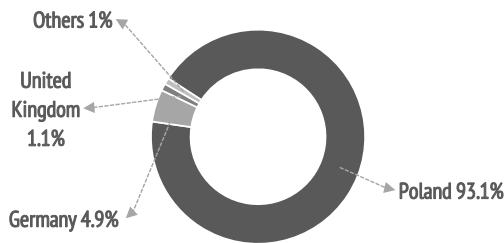
Recommend visiting the Canary Islands

How many are loyal to the Canary Islands?

	Poland	All markets
Repeat tourists	44.2%	71.0%
Repeat tourists (last 5 years)	41.0%	64.6%
Repeat tourists (last 5 years) (5 or mor	4.9%	18.4%
At least 10 previous visits	2.4%	17.8%

Where does the flight come from?

	%	Absolute
Poland	93.1%	257,847
Germany	4.9%	13,542
United Kingdom	1.1%	2,944
Spanish Mainland	0.6%	1,677
Sweden	0.1%	343
Switzerland	0.1%	329
Netherlands	0.1%	266



Who do they come with?

	Poland	All markets
Unaccompanied	4.2%	8.9%
Only with partner	44.2%	47.4%
Only with children (< 13 years old)	5.3%	5.9%
Partner + children (< 13 years old)	9.0%	7.2%
Other relatives	10.7%	9.0%
Friends	6.5%	6.3%
Work colleagues	0.6%	0.5%
Organized trip	0.1%	0.2%
Other combinations (1)	19.4%	14.6%

(1) Different situations have been isolated

Tourists with children	24.3%	19.3%
- Between 0 and 2 years old	3.3%	1.8%
- Between 3 and 12 years old	19.5%	15.8%
- Between 0 -2 and 3-12 years	1.6%	1.6%

Tourists without children	75.7%	80.7%
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Group composition:		
- 1 person	8.8%	12.4%
- 2 people	50.1%	54.1%
- 3 people	16.9%	12.6%
- 4 or 5 people	19.8%	17.1%
- 6 or more people	4.4%	3.8%
Average group size:	2.77	2.58



(Under the age of 13)

24.3% of Polish travel with children.

(Canary Islands: 19.3%)

Who are they?

	Poland	All markets
Gender		
Men	53.5%	48.2%
Women	46.5%	51.8%
Age		
Average age (tourist > 15 years old)	38.7	46.7
Standard deviation	13.3	15.3
Age range (> 15 years old)		
16 - 24 years old	9.9%	7.7%
25 - 30 years old	24.0%	10.8%
31 - 45 years old	41.4%	28.6%
46 - 60 years old	14.9%	31.3%
Over 60 years old	9.9%	21.5%
Occupation		
Salaried worker	44.4%	55.5%
Self-employed	13.4%	11.0%
Unemployed	1.6%	1.1%
Business owner	23.9%	9.2%
Student	9.6%	4.2%
Retired	6.8%	17.3%
Unpaid domestic work	0.1%	0.9%
Others	0.2%	0.8%
Annual household income level		
Less than €25,000	42.0%	17.0%
€25,000 - €49,999	38.6%	36.5%
€50,000 - €74,999	14.1%	25.0%
More than €74,999	5.4%	21.5%
Education level		
No studies	0.2%	4.8%
Primary education	1.3%	2.8%
Secondary education	18.7%	23.1%
Higher education	79.8%	69.3%



4 IN 10 TOURISTS ARE REPEATERS

39 YEARS OLD

AVERAGE AGE

44% ONLY WITH PARTNER



Pictures: Freepik.com

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

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