

How many are they and how much do they spend?

	Poland	All markets
TOURISTS		
Tourist arrivals (FRONTUR)	n.d.	15,110,866
Tourist arrivals > 15 years old (EGT)	292,805	13,271,035
- book holiday package	204,231	7,426,022
- do not book holiday package	88,574	5,845,014
- % tourists who book holiday package	69.7%	56.0%
Share of total tourist	2.2%	100%

RANKING POSITION BY
NUMBER OF TOURISTS

RANKING POSITION BY
TURNOVER



40% of Polish travel to Tenerife.

Expenditure per tourist (€)	1,040	1,136
- book holiday package	1,142	1,268
- holiday package	946	1,031
- others	195	237
- do not book holiday package	807	967
- flight	218	263
- accommodation	237	321
- others	352	383
Average length of stay	8.50	9.09
- book holiday package	8.06	8.64
- do not book holiday package	9.50	9.68
Average daily expenditure (€)	128.2	138.9
- book holiday package	141.6	155.4
- do not book holiday package	97.2	117.9
Total turnover (> 15 years old) (€m)	305	15,070
- book holiday package	233	9,416
- do not book holiday package	71	5,655

AVERAGE LENGTH OF STAY
(nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice

	Poland	All markets
Climate	82.9%	78.4%
Safety	70.0%	51.9%
Landscapes	63.5%	33.1%
Sea	60.4%	44.4%
Tranquility	57.5%	47.6%
European belonging	52.4%	36.1%
Beaches	50.0%	37.7%
Environment	47.3%	33.2%
Accommodation supply	43.2%	42.9%
Authenticity	39.3%	20.3%
Price	38.4%	37.4%
Effortless trip	35.5%	35.2%
Exoticism	32.3%	11.4%
Gastronomy	31.4%	23.2%
Fun possibilities	16.4%	21.1%
Hiking trail network	10.8%	9.6%
Culture	9.8%	8.0%
Historical heritage	7.8%	8.2%
Shopping	6.7%	9.4%
Nightlife	6.3%	8.0%

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
63.5%



ALL MARKETS
33.1%

What is the main motivation for their holidays?

	Poland	All markets
Rest	55.7%	55.5%
Enjoy family time	7.4%	14.4%
Have fun	3.7%	8.6%
Explore the destination	31.0%	17.8%
Practice their hobbies	1.4%	1.9%
Other reasons	0.7%	1.8%

EXPLORE THE
DESTINATION



How far in advance do they book their trip?

	Poland	All markets
The same day	1.1%	0.7%
Between 1 and 30 days	39.2%	23.8%
Between 1 and 2 months	21.5%	22.8%
Between 3 and 6 months	25.3%	32.7%
More than 6 months	12.8%	20.0%

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.

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

	Poland	All markets
Previous visits to the Canary Islands	39.6%	51.9%
Friends or relatives	29.4%	27.1%
Internet or social media	63.0%	54.7%
Mass Media	3.7%	1.6%
Travel guides and magazines	13.0%	8.4%
Travel Blogs or Forums	17.5%	5.7%
Travel TV Channels	1.1%	0.8%
Tour Operator or Travel Agency	32.9%	22.6%
Public administrations or similar	0.1%	0.4%
Others	1.7%	2.4%

* Multi-choise question

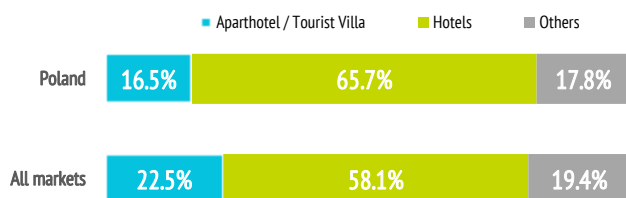
With whom did they book their flight and accommodation?

	Poland	All markets
Flight		
- Directly with the airline	27.1%	42.9%
- Tour Operator or Travel Agency	72.9%	57.1%
Accommodation		
- Directly with the accommodation	18.3%	31.5%
- Tour Operator or Travel Agency	81.7%	68.5%

Where do they stay?

	Poland	All markets
1-2-3* Hotel	14.9%	11.5%
4* Hotel	48.4%	37.6%
5* Hotel / 5* Luxury Hotel	2.4%	9.0%
Aparthotel / Tourist Villa	16.5%	22.5%
House/room rented in a private dwelling	6.6%	5.9%
Private accommodation (1)	3.5%	7.2%
Others (Cottage, cruise, camping...)	7.7%	6.3%

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



What do they book?

	Poland	All markets
Room only	17.6%	27.9%
Bed and Breakfast	5.6%	12.4%
Half board	12.4%	21.2%
Full board	2.0%	3.6%
All inclusive	62.4%	34.9%

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62.4% of Polish book all inclusive.
(Canary Islands: 34.9%)

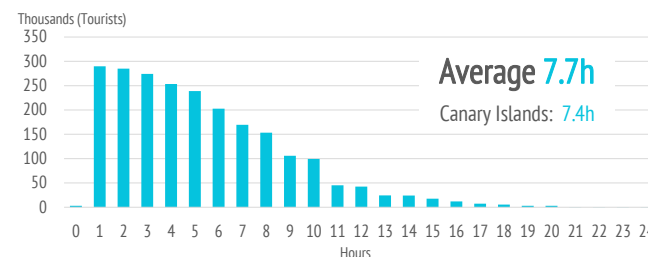
Other expenses

	Poland	All markets
Restaurants or cafes	40.9%	59.1%
Supermarkets	44.7%	52.1%
Car rental	31.3%	26.3%
Organized excursions	36.4%	20.6%
Taxi, transfer, chauffeur service	58.2%	50.0%
Theme Parks	13.0%	7.5%
Sport activities	3.7%	5.7%
Museums	3.9%	4.6%
Flights between islands	7.1%	4.4%

Activities in the Canary Islands

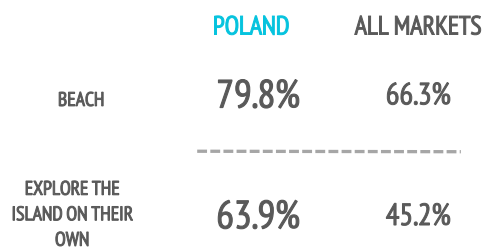
Outdoor time per day	Poland	All markets
0 hours	1.0%	2.1%
1 - 2 hours	5.3%	9.8%
3 - 6 hours	35.8%	32.6%
7 - 12 hours	49.5%	47.1%
More than 12 hours	8.3%	8.4%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



Activities in the Canary Islands	Poland	All markets
Beach	79.8%	66.3%
Walk, wander	74.3%	69.8%
Explore the island on their own	63.9%	45.2%
Swimming pool, hotel facilities	57.8%	58.2%
Organized excursions	34.9%	16.9%
Theme parks	25.7%	14.1%
Taste Canarian gastronomy	22.7%	24.2%
Sea excursions / whale watching	17.8%	11.1%
Sport activities	14.1%	13.4%
Nature activities	11.9%	10.4%
Museums / exhibitions	11.7%	10.1%
Wineries / markets / popular festivals	10.0%	11.6%
Nightlife / concerts / shows	9.4%	15.5%
Activities at sea	7.6%	10.0%
Astronomical observation	3.7%	3.5%
Beauty and health treatments	1.7%	5.4%

* Multi-choise question



Which island do they choose?

Tourists (> 15 years old)	Poland	All markets
Lanzarote	31,207	2,521,668
Fuerteventura	62,964	1,659,115
Gran Canaria	75,233	3,698,127
Tenerife	117,321	5,040,382
La Palma	5,183	235,409

How many islands do they visit during their trip?

	Poland	All markets
One island	84.4%	91.4%
Two islands	13.6%	7.2%
Three or more islands	2.1%	1.4%

Internet usage during their trip

	Poland	All markets
Research		
- Tourist package	19.2%	14.8%
- Flights	12.3%	13.0%
- Accommodation	21.6%	16.9%
- Transport	21.2%	15.7%
- Restaurants	32.8%	28.4%
- Excursions	40.0%	26.2%
- Activities	48.2%	30.1%
Book or purchase		
- Tourist package	40.2%	39.4%
- Flights	56.3%	66.7%
- Accommodation	50.3%	57.3%
- Transport	46.5%	47.6%
- Restaurants	13.8%	12.1%
- Excursions	19.9%	13.0%
- Activities	20.9%	14.7%

* Multi-choice question

Internet usage in the Canary Island	Poland	All markets
Did not use the Internet	6.5%	8.3%
Used the Internet	93.5%	91.7%
- Own Internet connection	49.4%	37.4%
- Free Wifi connection	25.1%	39.5%
Applications*		
- Search for locations or maps	80.0%	61.7%
- Search for destination info	59.6%	44.8%
- Share pictures or trip videos	51.9%	56.0%
- Download tourist apps	8.3%	7.0%
- Others	12.2%	22.6%

* Multi-choice question



80% of Polish search for locations or maps during their stay in the Canary Islands

(Canary Islands: 61.7%)



Picture: Freepik.com

Share by islands	Poland	All markets
Lanzarote	10.7%	19.2%
Fuerteventura	21.6%	12.6%
Gran Canaria	25.8%	28.1%
Tenerife	40.2%	38.3%
La Palma	1.8%	1.8%

MOST VISITED PLACES IN EACH ISLAND

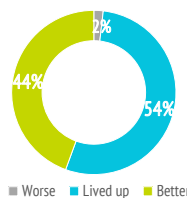


The data refers to % of tourists on each island who have visited the place.

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	Poland	All markets
Average rating	9.01	8.70
Experience in the Canary Islands		
Worse or much worse than expected	1.8%	2.3%
Lived up to expectations	53.7%	55.6%
Better or much better than expected	44.4%	42.1%

Future intentions (scale 1-10)	Poland	All markets
Return to the Canary Islands	8.68	8.73
Recommend visiting the Canary Island	9.26	8.95



Experience in the Canary Islands



Return to the Canary Islands



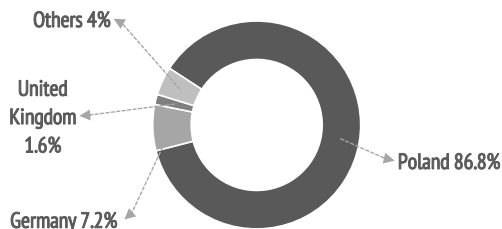
Recommend visiting the Canary Islands

How many are loyal to the Canary Islands?

	Poland	All markets
Repeat tourists	52.9%	72.2%
Repeat tourists (last 5 years)	49.9%	66.7%
Repeat tourists (last 5 years) (5 or mor	7.4%	19.5%
At least 10 previous visits	2.0%	18.6%

Where does the flight come from?

	%	Absolute
Poland	86.8%	254,233
Germany	7.2%	21,017
United Kingdom	1.6%	4,643
Spanish Mainland	1.4%	4,058
Netherlands	0.7%	2,074
Switzerland	0.2%	654
Others	2.1%	6,126



Who do they come with?

	Poland	All markets
Unaccompanied	5.3%	9.6%
Only with partner	45.1%	48.1%
Only with children (< 13 years old)	5.6%	5.6%
Partner + children (< 13 years old)	10.5%	6.5%
Other relatives	12.3%	9.3%
Friends	5.3%	6.4%
Work colleagues	0.3%	0.5%
Organized trip	0.2%	0.3%
Other combinations (1)	15.4%	13.7%
<i>(1) Different situations have been isolated</i>		
Tourists with children	26.2%	17.7%
- Between 0 and 2 years old	2.6%	1.6%
- Between 3 and 12 years old	21.8%	14.8%
- Between 0 -2 and 3-12 years	1.8%	1.4%
Tourists without children	73.8%	82.3%
Group composition:		
- 1 person	9.9%	13.2%
- 2 people	48.1%	55.1%
- 3 people	17.9%	12.0%
- 4 or 5 people	20.5%	16.3%
- 6 or more people	3.6%	3.5%
Average group size:	2.71	2.54



(Under the age of 13)

26.2% of Polish travel with children.

(Canary Islands: 17.7%)

Who are they?

	Poland	All markets
Gender		
Men	51.2%	48.6%
Women	48.8%	51.4%
Age		
Average age (tourist > 15 years old)	39.1	47.1
Standard deviation	12.6	15.4
Age range (> 15 years old)		
16 - 24 years old	8.9%	7.3%
25 - 30 years old	20.8%	10.9%
31 - 45 years old	44.1%	28.0%
46 - 60 years old	18.0%	31.8%
Over 60 years old	8.2%	22.1%
Occupation		
Salaried worker	40.1%	55.0%
Self-employed	20.9%	11.5%
Unemployed	4.9%	1.1%
Business owner	22.8%	9.4%
Student	5.3%	3.5%
Retired	5.3%	17.9%
Unpaid domestic work	0.5%	0.8%
Others	0.4%	0.8%
Annual household income level		
Less than €25,000	35.0%	17.5%
€25,000 - €49,999	47.6%	37.5%
€50,000 - €74,999	11.2%	22.8%
More than €74,999	6.2%	22.2%
Education level		
No studies	1.3%	5.0%
Primary education	1.2%	2.6%
Secondary education	19.5%	23.6%
Higher education	78.0%	68.9%



5 IN 10 TOURISTS ARE REPEATERS

39 YEARS OLD

AVERAGE AGE

45% ONLY WITH PARTNER



Pictures: Freepik.com

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.