

TOURIST PROFILE BY QUARTER OF TRIP (2018)

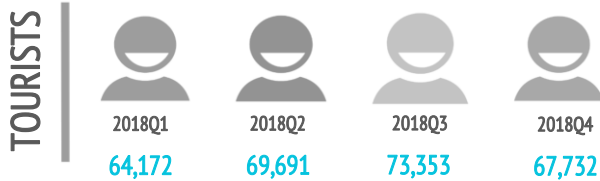
POLAND

How many are they and how much do they spend?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
TOURISTS					
Tourist arrivals (FRONTUR)	n.d.	n.d.	n.d.	n.d.	n.d.
Tourist arrivals > 15 years old (EGT) (*)	64.2	69.7	75.4	67.7	276.9
- book holiday package (*)	47.4	58.0	63.1	53.1	221.6
- do not book holiday package (*)	16.8	11.7	12.2	14.7	55.4
- % tourists who book holiday package	73.9%	83.2%	83.8%	78.4%	80.0%

(*) Thousand of tourists

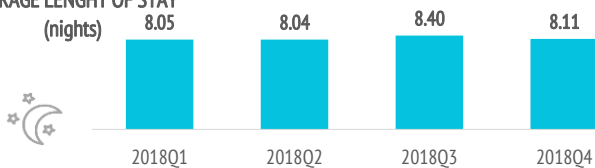


% TOURISTS WHO BOOK HOLIDAY PACKAGE

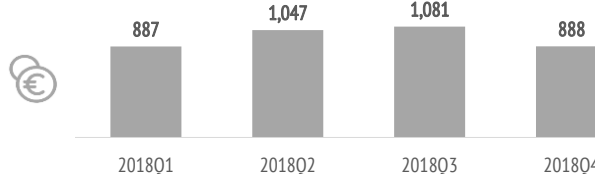


	2018Q1	2018Q2	2018Q3	2018Q4	2018
Expenditure per tourist (€)	887	1,047	1,081	888	980
- book holiday package	969	1,098	1,139	981	1,054
- holiday package	789	881	914	802	852
- others	179	216	225	178	202
- do not book holiday package	657	796	784	554	687
- flight	186	250	189	139	188
- accommodation	207	209	170	130	179
- others	264	337	425	285	321
Average length of stay	8.05	8.04	8.40	8.11	8.16
- book holiday package	7.79	7.93	8.22	7.82	7.96
- do not book holiday package	8.78	8.59	9.29	9.14	8.95
Average daily expenditure (€)	116.8	134.8	134.0	115.6	125.7
- book holiday package	127.6	142.6	143.9	128.7	136.4
- do not book holiday package	86.4	96.2	82.9	68.0	82.8
Total turnover (> 15 years old) (€m)	57	73	81	60	272
- book holiday package	46	64	72	52	233
- do not book holiday package	11	9	10	8	38

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Climate	81.2%	73.9%	71.9%	82.3%	77.1%
Safety	70.7%	64.1%	72.6%	68.8%	69.1%
Landscapes	56.9%	64.6%	59.5%	53.4%	58.7%
Sea	54.6%	54.3%	57.0%	60.4%	56.6%
Tranquility	58.8%	49.9%	47.3%	54.3%	52.3%
European belonging	56.5%	40.0%	46.5%	54.2%	49.0%
Beaches	43.6%	46.1%	47.6%	48.8%	46.6%
Environment	48.2%	55.1%	37.9%	39.2%	44.9%
Accommodation supply	41.8%	40.0%	52.3%	44.2%	44.8%
Price	43.8%	31.2%	36.6%	31.5%	35.6%
Authenticity	33.0%	34.1%	37.3%	35.3%	35.0%
Gastronomy	33.3%	29.6%	33.3%	27.0%	30.8%
Exoticism	33.3%	26.6%	30.3%	30.9%	30.2%
Effortless trip	40.4%	27.8%	25.1%	27.0%	29.7%
Fun possibilities	10.2%	12.8%	13.7%	14.3%	12.8%
Hiking trail network	9.6%	8.4%	4.3%	11.4%	8.3%
Culture	7.1%	5.8%	10.1%	6.1%	7.3%
Historical heritage	8.4%	5.3%	6.2%	6.1%	6.4%
Shopping	3.8%	6.0%	5.1%	8.1%	5.8%
Nightlife	6.0%	5.5%	6.1%	4.7%	5.6%

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 LANDSCAPES



What is the main motivation for their holidays?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Rest	66.3%	54.8%	52.1%	58.7%	57.6%
Enjoy family time	3.1%	8.3%	6.8%	4.6%	5.8%
Have fun	3.5%	2.4%	4.2%	1.0%	2.8%
Explore the destination	27.1%	32.5%	33.9%	31.7%	31.4%
Practice their hobbies	0.0%	1.0%	1.6%	2.4%	1.3%
Other reasons	0.0%	1.0%	1.4%	1.5%	1.0%

How far in advance do they book their trip?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
The same day	1.6%	1.4%	3.9%	0.6%	1.9%
Between 1 and 30 days	42.5%	36.5%	51.6%	50.3%	45.3%
Between 1 and 2 months	23.3%	20.7%	12.8%	20.8%	19.2%
Between 3 and 6 months	24.9%	26.1%	17.7%	16.5%	21.2%
More than 6 months	7.7%	15.3%	14.1%	11.8%	12.3%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



Picture: 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.

TOURIST PROFILE BY QUARTER OF TRIP (2018)

POLAND



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

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Previous visits to the Canary Islands	40.1%	34.7%	25.4%	34.5%	33.4%
Friends or relatives	26.9%	30.1%	24.2%	39.4%	30.0%
Internet or social media	67.3%	65.5%	71.3%	66.0%	67.6%
Mass Media	2.6%	2.7%	4.4%	3.4%	3.3%
Travel guides and magazines	16.1%	15.1%	16.7%	9.8%	14.5%
Travel Blogs or Forums	13.7%	15.1%	20.4%	15.9%	16.4%
Travel TV Channels	1.9%	1.6%	1.7%	1.6%	1.7%
Tour Operator or Travel Agency	35.1%	37.8%	51.5%	35.9%	40.4%
Public administrations or similar	0.0%	0.6%	1.1%	0.0%	0.5%
Others	1.5%	2.8%	3.0%	0.9%	2.1%

* Multi-choice question

With whom did they book their flight and accommodation? 👁

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Flight					
- Directly with the airline	24.7%	14.7%	11.6%	17.7%	16.9%
- Tour Operator or Travel Agency	75.3%	85.3%	88.4%	82.3%	83.1%
Accommodation					
- Directly with the accommodation	16.8%	11.8%	9.0%	12.5%	12.3%
- Tour Operator or Travel Agency	83.2%	88.2%	91.0%	87.5%	87.7%

Where do they stay? 🏠

	2018Q1	2018Q2	2018Q3	2018Q4	2018
1-2-3* Hotel	22.3%	19.1%	21.0%	15.5%	19.5%
4* Hotel	45.4%	50.3%	52.7%	51.4%	50.1%
5* Hotel / 5* Luxury Hotel	1.2%	2.3%	1.8%	2.6%	2.0%
Aparthotel / Tourist Villa	11.0%	13.3%	13.9%	10.3%	12.2%
House/room rented in a private dwelling	6.4%	4.2%	4.7%	5.3%	5.1%
Private accommodation ⁽¹⁾	5.0%	2.4%	0.4%	2.6%	2.5%
Others (Cottage, cruise, camping,...)	8.8%	8.3%	5.4%	12.3%	8.6%

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

What do they book? 🍽

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Room only	16.1%	11.2%	7.7%	7.9%	10.5%
Bed and Breakfast	2.4%	2.5%	2.3%	4.4%	2.8%
Half board	7.4%	11.8%	13.3%	10.6%	11.0%
Full board	1.4%	1.1%	0.4%	2.1%	1.2%
All inclusive	72.7%	73.4%	76.3%	74.9%	74.4%

74.4% of Polish book all inclusive.



72.7%
2018Q1



76.3%
2018Q3



73.4%
2018Q2



74.9%
2018Q4

Other expenses 📍

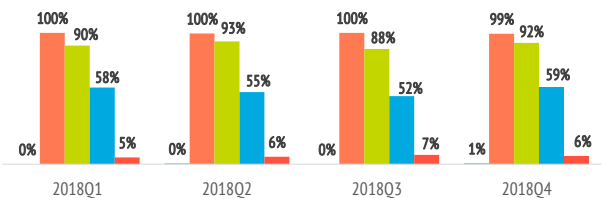
	2018Q1	2018Q2	2018Q3	2018Q4	TOTAL
Restaurants or cafes	36.4%	40.0%	38.5%	35.9%	37.7%
Supermarkets	49.8%	37.0%	47.4%	40.8%	43.7%
Car rental	24.6%	34.4%	29.1%	28.2%	29.2%
Organized excursions	32.6%	34.3%	45.3%	38.7%	38.0%
Taxi, transfer, chauffeur service	67.9%	49.5%	70.6%	48.8%	59.4%
Theme Parks	9.6%	11.3%	13.2%	8.9%	10.8%
Sport activities	4.3%	4.4%	5.8%	4.7%	4.8%
Museums	6.6%	4.8%	4.9%	5.9%	5.5%
Flights between islands	5.6%	3.7%	8.8%	5.6%	6.0%

Activities in the Canary Islands 🚶

Outdoor time per day	2018Q1	2018Q2	2018Q3	2018Q4	2018
0 hours	0.0%	0.5%	0.0%	0.6%	0.3%
1 - 2 hours	9.7%	6.1%	12.2%	7.0%	8.8%
3 - 6 hours	31.9%	38.5%	36.0%	33.6%	35.1%
7 - 12 hours	53.2%	49.2%	44.7%	52.5%	49.7%
More than 12 hours	5.2%	5.7%	7.1%	6.3%	6.1%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

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



Activities in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Beach	74.9%	84.2%	85.1%	82.2%	81.8%
Walk, wander	77.5%	78.4%	74.1%	75.9%	76.4%
Swimming pool, hotel facilities	58.9%	67.8%	71.1%	59.7%	64.7%
Explore the island on their own	62.3%	58.4%	58.6%	61.3%	60.1%
Organized excursions	33.6%	41.6%	48.8%	40.2%	41.4%
Theme parks	23.9%	28.6%	26.3%	20.4%	24.9%
Taste Canarian gastronomy	24.1%	18.5%	25.8%	23.3%	23.0%
Sea excursions / whale watching	15.2%	21.5%	23.3%	22.5%	20.8%
Sport activities	19.3%	14.3%	17.5%	20.0%	17.7%
Wineries/markets/popular festival:	12.5%	9.6%	12.9%	11.0%	11.5%
Nature activities	17.0%	12.1%	6.3%	9.2%	11.0%
Nightlife / concerts / shows	12.2%	5.8%	12.0%	9.3%	9.8%
Museums / exhibitions	9.9%	8.6%	9.2%	9.3%	9.2%
Activities at sea	9.0%	12.0%	6.7%	9.2%	9.2%
Astronomical observation	1.8%	3.0%	3.3%	2.3%	2.6%
Beauty and health treatments	4.0%	1.1%	2.0%	3.2%	2.6%

* Multi-choice question



TOURIST PROFILE BY QUARTER OF TRIP (2018)

POLAND



Which island do they choose?

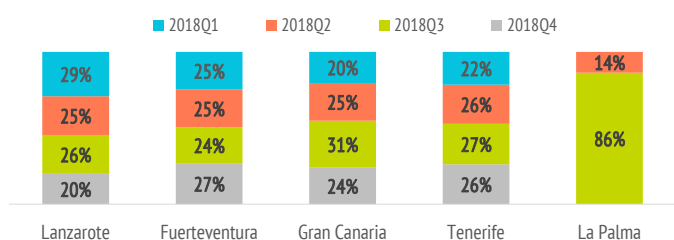
Tourists (> 15 years old)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	12,455	10,882	10,917	8,508	42,761
Fuerteventura	14,953	14,991	14,244	16,281	60,469
Gran Canaria	10,805	13,208	16,351	12,734	53,098
Tenerife	24,867	29,599	30,721	30,209	115,396
La Palma	0	493	3,121	0	3,614

Share by islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	19.7%	15.7%	14.5%	12.6%	15.5%
Fuerteventura	23.7%	21.7%	18.9%	24.0%	22.0%
Gran Canaria	17.1%	19.1%	21.7%	18.8%	19.3%
Tenerife	39.4%	42.8%	40.8%	44.6%	41.9%
La Palma	0.0%	0.7%	4.1%	0.0%	1.3%

How many islands do they visit during their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
One island	82.4%	84.2%	81.5%	81.6%	82.4%
Two islands	12.6%	14.7%	16.8%	17.1%	15.4%
Three or more islands	5.0%	1.1%	1.7%	1.3%	2.2%

% TOURISTS BY ISLAND AND QUARTER OF TRIP



MOST VISITED PLACES IN EACH ISLAND



Internet usage during their trip

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Research					
- Tourist package	21.1%	20.8%	26.0%	25.3%	23.5%
- Flights	10.6%	13.2%	15.0%	18.1%	14.2%
- Accommodation	19.9%	21.5%	27.2%	29.0%	24.6%
- Transport	18.2%	18.2%	32.2%	25.3%	24.0%
- Restaurants	29.2%	30.3%	35.3%	36.8%	33.1%
- Excursions	46.8%	45.5%	46.2%	41.6%	45.0%
- Activities	61.0%	53.1%	50.0%	51.7%	53.6%
Book or purchase					
- Tourist package	40.3%	39.4%	32.2%	33.7%	36.1%
- Flights	47.4%	49.0%	34.9%	43.5%	43.4%
- Accommodation	39.9%	46.0%	33.6%	39.6%	39.5%
- Transport	34.7%	46.8%	26.6%	34.6%	35.3%
- Restaurants	7.8%	13.3%	8.1%	8.8%	9.4%
- Excursions	8.8%	16.0%	16.3%	17.9%	15.0%
- Activities	9.1%	17.3%	16.3%	12.4%	14.1%

* Multi-choice question

Internet usage in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Did not use the Internet	10.7%	7.5%	8.3%	10.4%	9.2%
Used the Internet	89.3%	92.5%	91.7%	89.6%	90.8%
- Own Internet connection	48.1%	48.9%	54.3%	52.5%	51.0%
- Free Wifi connection	24.3%	26.5%	26.3%	23.5%	25.2%
Applications*					
- Search for locations or maps	78.4%	78.9%	81.6%	87.0%	81.5%
- Search for destination info	55.8%	59.9%	61.4%	67.3%	61.2%
- Share pictures or trip videos	52.8%	43.9%	49.8%	51.9%	49.5%
- Download tourist apps	11.2%	4.8%	7.3%	12.6%	8.8%
- Others	12.4%	12.1%	11.9%	16.6%	13.2%

* Multi-choice question

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

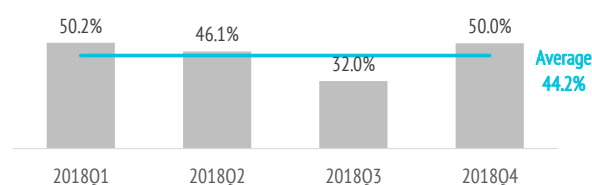
How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Average rating	8.83	8.80	8.83	8.76	8.81
Experience in the Canary Islands					
Worse or much worse than expected	2.8%	7.0%	3.8%	2.2%	4.0%
Lived up to expectations	58.2%	52.8%	51.8%	56.2%	54.6%
Better or much better than expected	39.0%	40.2%	44.3%	41.6%	41.4%
Future intentions (scale 1-10)					
Return to the Canary Islands	8.64	8.51	8.22	8.42	8.44
Recommend visiting the Canary Islands	9.11	9.02	8.95	9.06	9.03

How many are loyal to the Canary Islands?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Repeat tourists	50.2%	46.1%	32.0%	50.0%	44.2%
Repeat tourists (last 5 years)	46.5%	44.1%	29.0%	45.9%	41.0%
Repeat tourists (last 5 years)(5 or more visits)	4.5%	5.2%	3.4%	6.5%	4.9%
At least 10 previous visits	2.5%	1.9%	0.9%	4.3%	2.4%

REPEAT TOURISTS



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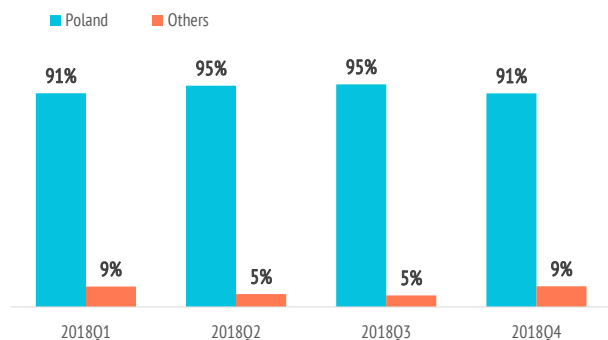
POLAND

Where does the flight come from?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Poland	91.3%	94.5%	95.1%	91.2%	93.1%
Germany	6.0%	3.8%	3.3%	6.7%	4.9%
United Kingdom	1.8%	1.3%	0.7%	0.6%	1.1%
Others	0.9%	0.4%	0.9%	1.5%	0.9%

% TOURISTS BY QUARTER OF TRIP



Who do they come with?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Unaccompanied	5.7%	2.0%	2.8%	6.6%	4.2%
Only with partner	43.5%	42.2%	45.1%	45.7%	44.2%
Only with children (< 13 years old)	6.4%	6.7%	4.7%	3.5%	5.3%
Partner + children (< 13 years old)	10.2%	10.7%	8.4%	6.9%	9.0%
Other relatives	5.7%	11.4%	14.6%	10.5%	10.7%
Friends	10.9%	3.9%	4.9%	6.6%	6.5%
Work colleagues	0.7%	0.9%	0.4%	0.4%	0.6%
Organized trip	0.0%	0.0%	0.0%	0.5%	0.1%
Other combinations ⁽¹⁾	17.0%	22.2%	19.0%	19.3%	19.4%

(1) Different situations have been isolated

Tourists with children	2018Q1	2018Q2	2018Q3	2018Q4	2018
- Between 0 and 2 years old	3.8%	3.8%	2.3%	3.2%	3.3%
- Between 3 and 12 years old	16.7%	24.0%	20.6%	16.3%	19.5%
- Between 0 -2 and 3-12 years	2.5%	2.7%	0.4%	0.8%	1.6%

Tourists without children	2018Q1	2018Q2	2018Q3	2018Q4	2018
Tourists without children	77.0%	69.5%	76.6%	79.7%	75.7%
Group composition:					
- 1 person	8.7%	8.4%	5.8%	12.5%	8.8%
- 2 people	55.6%	45.4%	51.6%	48.0%	50.1%
- 3 people	13.9%	14.6%	23.2%	15.0%	16.9%
- 4 or 5 people	17.7%	25.1%	17.5%	19.1%	19.8%
- 6 or more people	4.1%	6.4%	2.0%	5.4%	4.4%
Average group size:	2.65	2.96	2.72	2.76	2.77



24.3% of Polish travel with children.



Who are they?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Gender					
Men	47.5%	50.4%	56.9%	58.8%	53.5%
Women	52.5%	49.6%	43.1%	41.2%	46.5%
Age					
Average age (tourist > 15 years old)	40.2	40.2	35.5	39.2	38.7
Standard deviation	13.2	13.5	11.3	14.4	13.3
Age range (> 15 years old)					
16 - 24 years old	5.6%	8.8%	15.3%	9.1%	9.9%
25 - 30 years old	21.3%	21.8%	25.4%	27.2%	24.0%
31 - 45 years old	45.4%	41.7%	40.7%	37.8%	41.4%
46 - 60 years old	17.7%	15.9%	14.1%	12.0%	14.9%
Over 60 years old	9.9%	11.8%	4.4%	13.9%	9.9%
Occupation					
Salaried worker	38.1%	41.0%	44.3%	53.9%	44.4%
Self-employed	20.0%	14.3%	10.7%	9.3%	13.4%
Unemployed	1.1%	1.2%	3.3%	0.6%	1.6%
Business owner	25.6%	30.7%	19.6%	20.1%	23.9%
Student	4.8%	5.4%	20.2%	6.7%	9.6%
Retired	10.4%	7.1%	1.9%	8.7%	6.8%
Unpaid domestic work	0.0%	0.4%	0.0%	0.0%	0.1%
Others	0.0%	0.0%	0.0%	0.6%	0.2%
Annual household income level					
Less than €25,000	35.3%	41.2%	46.1%	44.5%	42.0%
€25,000 - €49,999	45.4%	36.3%	32.9%	40.7%	38.6%
€50,000 - €74,999	18.2%	12.7%	15.8%	9.6%	14.1%
More than €74,999	1.0%	9.8%	5.2%	5.1%	5.4%
Education level					
No studies	0.0%	0.0%	0.3%	0.7%	0.2%
Primary education	0.5%	0.9%	2.5%	0.9%	1.3%
Secondary education	20.5%	15.5%	21.7%	16.8%	18.7%
Higher education	79.0%	83.6%	75.5%	81.6%	79.8%



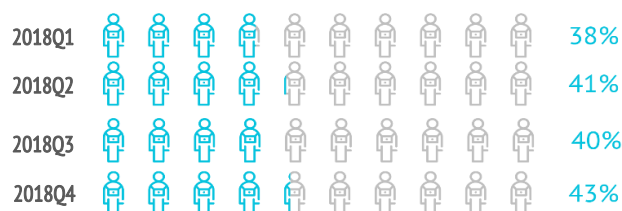
AVERAGE AGE (> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999



% SALARIED WORKED TOURISTS



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.