

Tourist profile trend (2016)

Canary Islands: Polish market



How many are they and how much do they spend?



	2012	2013	2014	2015	2016
Tourist arrivals (> 16 years old)	140,213	--	127,679	138,684	119,090
Average daily expenditure (€)	117.28	--	113.91	112.17	123.46
- in their place of residence	86.59	--	83.81	81.96	91.29
- in the Canary Islands	30.69	--	30.10	30.21	32.16
Average length of stay	8.72	--	8.61	8.61	8.21
Turnover per tourist (€)	970	--	929	925	975
Total turnover (> 16 years old) (€m)	136	--	119	128	116
Polish turnover: year on year change	--	--	--	8.1%	-9.5%
Polish tourist arrivals: year on year change	--	--	--	8.6%	-14.1%

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

Accommodation (**):	14.49	--	16.33	29.37	32.01
- Accommodation	13.15	--	14.74	27.90	30.81
- Additional accommodation expenses	1.35	--	1.58	1.47	1.20
Transport:	25.23	--	24.44	31.46	21.26
- Public transport	5.55	--	6.10	8.42	6.32
- Taxi	2.81	--	2.72	2.68	4.33
- Car rental	16.87	--	15.61	20.36	10.61
Food and drink:	55.33	--	60.84	68.59	64.20
- Food purchases at supermarkets	26.50	--	33.20	36.91	36.02
- Restaurants	28.83	--	27.64	31.69	28.18
Souvenirs:	79.21	--	75.06	71.45	66.53
Leisure:	58.16	--	59.97	59.90	56.98
- Organized excursions	35.81	--	36.00	32.99	33.00
- Leisure, amusement	7.11	--	10.22	8.85	7.17
- Trip to other islands	5.19	--	4.56	7.26	3.18
- Sporting activities	5.79	--	5.96	5.85	8.64
- Cultural activities	0.84	--	1.16	0.94	1.70
- Discos and disco-pubs	3.43	--	2.08	4.02	3.29
Others:	14.89	--	9.09	8.08	11.46
- Wellness	1.79	--	0.97	1.10	5.80
- Medical expenses	0.95	--	0.14	0.92	0.68
- Other expenses	12.15	--	7.97	6.06	4.98

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.6%	--	1.8%	2.1%	1.3%
Between 2 and 7 days	22.4%	--	30.8%	29.6%	19.6%
Between 8 and 15 days	13.5%	--	15.1%	13.1%	14.4%
Between 16 and 30 days	15.0%	--	15.4%	13.9%	16.6%
Between 31 and 90 days	25.6%	--	19.8%	22.6%	23.9%
More than 90 days	23.0%	--	17.1%	18.7%	24.2%

What do they book at their place of residence?



	2012	2013	2014	2015	2016
Flight only	2.7%	--	3.3%	5.2%	4.2%
Flight and accommodation (room only)	5.3%	--	6.1%	10.2%	10.8%
Flight and accommodation (B&B)	1.6%	--	2.2%	2.3%	4.5%
Flight and accommodation (half board)	3.1%	--	3.0%	4.8%	3.4%
Flight and accommodation (full board)	16.4%	--	14.3%	9.4%	12.6%
Flight and accommodation (all inclusive)	70.9%	--	71.1%	68.2%	64.6%
% Tourists using low-cost airlines	40.5%	--	39.6%	52.5%	52.4%
Other expenses in their place of residence:					
- Car rental	4.5%	--	5.0%	11.8%	13.4%
- Sporting activities	2.9%	--	4.7%	8.0%	4.5%
- Excursions	5.8%	--	10.0%	9.5%	10.8%
- Trip to other islands	2.0%	--	3.3%	1.9%	2.3%

(*) Expense is prorated among all the tourists (even those who have not spent in destination).

(**) Accommodation expenses may seem low because most tourists pay the accommodation before traveling.

How do they book?



	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	57.1%	--	57.2%	47.9%	44.2%
- Tour Operator's website	35.1%	--	40.9%	62.6%	51.2%
Accommodation	3.5%	--	4.6%	10.4%	11.7%
- Accommodation's website	83.5%	--	78.9%	82.5%	89.3%
Travel agency (High street)	32.4%	--	31.1%	31.1%	29.4%
Online Travel Agency (OTA)	5.0%	--	6.2%	8.1%	13.1%
No need to book accommodation	1.9%	--	0.8%	2.5%	1.6%

	2012	2013	2014	2015	2016
Flight booking					
Tour Operator	57.4%	--	59.7%	49.0%	46.4%
- Tour Operator's website	33.1%	--	38.2%	59.7%	52.9%
Airline	6.8%	--	8.9%	18.1%	19.5%
- Airline's website	81.2%	--	73.7%	87.7%	88.7%
Travel agency (High street)	31.9%	--	28.8%	28.6%	28.8%
Online Travel Agency (OTA)	3.8%	--	2.6%	4.3%	5.3%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	5.1%	--	2.5%	2.7%	3.9%
4* Hotel	48.6%	--	56.9%	52.4%	49.2%
1-2-3* Hotel	22.1%	--	22.6%	18.0%	20.5%
Apartment	21.8%	--	15.7%	22.3%	23.4%
Property (privately-owned, friends, family)	1.3%	--	1.5%	2.6%	1.1%
Others	1.2%	--	0.8%	2.0%	1.8%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	47.7%	--	48.7%	51.1%	50.8%
Percentage of women	52.3%	--	51.3%	48.9%	49.2%

	2012	2013	2014	2015	2016
Age					
Average age (tourists > 16 years old)	38.6	--	36.3	35.8	37.6
Standard deviation	12.5	--	10.9	10.7	12.5

	2012	2013	2014	2015	2016
Age range (> 16 years old)					
16-24 years old	9.5%	--	9.0%	9.0%	9.3%
25-30 years old	25.1%	--	29.2%	31.0%	24.7%
31-45 years old	36.5%	--	42.4%	44.5%	44.7%
46-60 years old	23.3%	--	16.4%	12.0%	14.1%
Over 60 years old	5.6%	--	3.0%	3.5%	7.3%

	2012	2013	2014	2015	2016
Occupation					
Business owner or self-employed	38.6%	--	37.9%	39.4%	41.1%
Upper/Middle management employee	39.4%	--	37.6%	36.3%	31.0%
Auxiliary level employee	8.7%	--	13.8%	12.4%	12.8%
Students	7.2%	--	7.3%	5.9%	6.0%
Retired	4.2%	--	1.1%	3.3%	4.6%
Unemployed / unpaid dom. work	1.8%	--	2.2%	2.6%	4.5%

	2012	2013	2014	2015	2016
Annual household income level					
€12,000 - €24,000	40.1%	--	42.0%	41.6%	38.1%
€24,001 - €36,000	24.5%	--	24.2%	22.6%	23.0%
€36,001 - €48,000	12.4%	--	12.4%	16.9%	12.4%
€48,001 - €60,000	4.7%	--	11.0%	7.8%	10.4%
€60,001 - €72,000	7.4%	--	2.7%	5.7%	7.8%
€72,001 - €84,000	3.8%	--	1.6%	2.7%	0.0%
More than €84,000	7.1%	--	6.0%	2.7%	8.3%

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Which island do they choose?

Tourists (> 16 years old)	2012	2013	2014	2015	2016
- Lanzarote	14,910	--	22,422	25,311	14,218
- Fuerteventura	51,637	--	38,863	44,822	31,782
- Gran Canaria	22,703	--	18,833	18,905	26,077
- Tenerife	49,242	--	47,012	49,408	46,214
- La Palma	1,723	--	106	0	800

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	10.6%	--	17.6%	18.3%	11.9%
- Fuerteventura	36.8%	--	30.5%	32.4%	26.7%
- Gran Canaria	16.2%	--	14.8%	13.7%	21.9%
- Tenerife	35.1%	--	36.9%	35.7%	38.8%
- La Palma	1.2%	--	0.1%	0.0%	0.7%

Who do they come with?

	2012	2013	2014	2015	2016
Unaccompanied	4.9%	--	5.5%	5.8%	3.4%
Only with partner	48.8%	--	50.7%	47.7%	43.6%
Only with children (under the age of 13)	1.9%	--	2.1%	1.5%	1.0%
Partner + children (under the age of 13)	14.8%	--	12.8%	15.1%	14.1%
Other relatives	6.8%	--	5.8%	7.1%	8.1%
Friends	4.5%	--	6.6%	5.6%	5.4%
Work colleagues	0.8%	--	0.9%	1.2%	0.6%
Other combinations ⁽¹⁾	17.5%	--	15.6%	16.1%	23.8%

* Multi-choice question (different situations have been isolated)

How do they rate the destination?

Impression of their stay	2012	2013	2014	2015	2016
Good or very good (% tourists)	92.9%	--	96.5%	96.6%	94.7%
Average rating (scale 1-10)	9.04	--	9.22	9.25	9.05

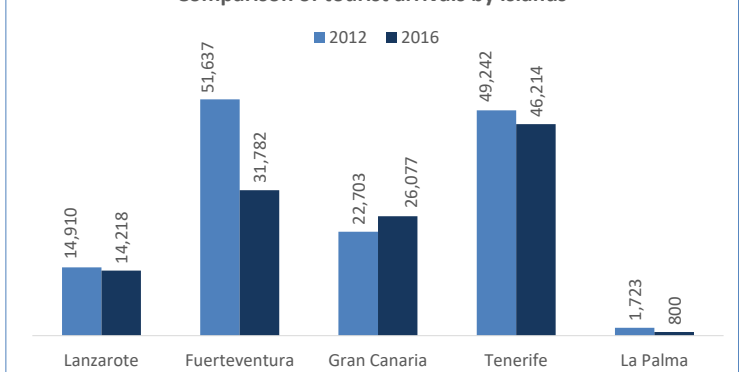
How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	37.0%	--	41.6%	37.7%	47.3%
In love (at least 10 previous visits)	1.6%	--	1.2%	1.1%	1.9%

Where does the flight come from?

Ten main origin countries	2012	2013	2014	2015	2016
Poland	121,397	--	111,314	125,579	100,402
United Kingdom	2,093	--	3,004	4,211	6,301
Germany	8,630	--	6,659	4,116	6,226
Spanish Mainland	4,099	--	2,653	2,270	3,785
Belgium	446	--	0	0	494
Denmark	743	--	0	0	492
Ireland	472	--	2,033	590	399
France	0	--	0	0	379
Norway	860	--	491	322	314
Austria	588	--	356	578	0

Comparison of tourist arrivals by islands



Source: Encuesta sobre el Gasto Turístico (ISTAC). The information of 2013 is not shown due to sample failure. (1) Combination of some groups previously analyzed.

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

Why do they choose the Canary Islands?

Aspects influencing the choice	2012	2013	2014	2015	2016
Climate/sun	89.3%	--	89.1%	86.7%	85.2%
Scenery	35.3%	--	38.1%	42.8%	37.0%
Beaches	33.4%	--	39.3%	33.6%	30.8%
Tranquillity/rest/relaxation	33.0%	--	34.1%	29.6%	27.9%
Security	11.1%	--	7.3%	16.0%	24.6%
Visiting new places	31.3%	--	29.8%	27.6%	24.0%
Price	8.7%	--	9.6%	8.5%	11.1%
Active tourism	9.8%	--	7.7%	8.1%	10.6%
Nautical activities	3.6%	--	3.5%	4.3%	5.7%
Suitable destination for children	6.4%	--	5.9%	4.4%	5.2%
Quality of the environment	4.8%	--	3.7%	6.2%	4.5%
Ease of travel	3.9%	--	2.7%	2.4%	3.3%
Security against natural catastrophes	0.4%	--	0.7%	0.5%	3.1%
Theme parks	3.3%	--	5.0%	5.5%	2.2%
Shopping	1.2%	--	2.7%	3.5%	2.0%
Nightlife/fun	2.5%	--	3.3%	1.8%	2.0%

* Multi-choice question

What did motivate them to come?

Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	30.1%	--	37.0%	31.5%	38.1%
Recommendation by friends or relatives	38.4%	--	34.7%	39.4%	35.2%
The Canary Islands television channel	0.4%	--	0.8%	0.6%	0.4%
Other television or radio channels	3.7%	--	4.9%	5.1%	3.8%
Information in the press/magazines/books	12.4%	--	12.6%	11.6%	8.9%
Attendance at a tourism fair	1.2%	--	0.5%	0.0%	1.7%
Tour Operator's brochure or catalogue	14.8%	--	13.3%	10.1%	8.9%
Recommendation by Travel Agency	24.8%	--	21.6%	18.9%	20.5%
Information obtained via the Internet	39.6%	--	41.7%	45.0%	44.2%
Senior Tourism programme	0.2%	--	0.2%	0.3%	0.0%
Others	3.8%	--	4.0%	3.5%	4.0%

* Multi-choice question

Share of tourists by islands (2016)

