

Tourist profile trend (2017)

POLAND

How many are they and how much do they spend?



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR)	n.d.	n.d.	n.d.	n.d.	n.d.
Tourist arrivals (> 16 years old)	--	127,679	138,684	119,090	266,514
Average daily expenditure (€)	--	113.91	112.17	123.46	132.10
. in their place of residence	--	83.81	81.96	91.29	97.24
. in the Canary Islands	--	30.10	30.21	32.16	34.86
Average length of stay	--	8.61	8.61	8.21	7.94
Turnover per tourist (€)	--	929	925	975	985
Total turnover (> 16 years old) (€m)	--	119	128	116	263
Tourist arrivals: year on year change	--	--	8.6%	-14.1%	123.8%
Turnover: year on year change	--	--	8.1%	-9.5%	126.2%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	--	9.1%	12.4%	16.6%	12.4%
- Additional accommodation expenses	--	1.8%	1.7%	2.4%	3.6%
Transport:					
- Public transport	--	21.4%	20.8%	21.0%	18.6%
- Taxi	--	12.3%	12.4%	13.3%	10.4%
- Car rental	--	27.3%	29.8%	21.3%	27.8%
Food and drink:					
- Food purchases at supermarkets	--	49.7%	45.6%	50.9%	49.8%
- Restaurants	--	34.1%	37.7%	35.2%	39.7%
Souvenirs:	--	78.0%	69.1%	68.0%	68.0%
Leisure:					
- Organized excursions	--	38.5%	31.4%	28.1%	34.5%
- Leisure, amusement	--	16.9%	14.9%	13.3%	12.2%
- Trip to other islands	--	6.6%	7.1%	5.3%	5.0%
- Sporting activities	--	7.2%	10.3%	11.4%	8.1%
- Cultural activities	--	4.0%	3.8%	4.6%	4.6%
- Discos and disco-pubs	--	4.3%	6.6%	5.8%	5.4%
Others:					
- Wellness	--	2.0%	2.9%	4.7%	2.6%
- Medical expenses	--	1.4%	3.4%	2.1%	2.0%
- Other expenses	--	12.7%	8.9%	4.7%	9.9%

2017



+124%
TOURISTS*
266,514



+1%
TRAVEL EXPENSES
€985



+126%
TURNOVER
€263 MILL

What do they book at their place of residence?



	2013	2014	2015	2016	2017
Flight only	--	3.3%	5.2%	4.2%	4.2%
Flight and accommodation (room only)	--	6.1%	10.2%	10.8%	11.9%
Flight and accommodation (B&B)	--	2.2%	2.3%	4.5%	3.2%
Flight and accommodation (half board)	--	3.0%	4.8%	3.4%	3.9%
Flight and accommodation (full board)	--	14.3%	9.4%	12.6%	16.6%
Flight and accommodation (all inclusive)	--	71.1%	68.2%	64.6%	60.2%
<u>% Tourists using low-cost airlines</u>	--	39.6%	52.5%	52.4%	53.6%
<u>Other expenses in their place of residence:</u>					
- Car rental	--	5.0%	11.8%	13.4%	14.3%
- Sporting activities	--	4.7%	8.0%	4.5%	4.7%
- Excursions	--	10.0%	9.5%	10.8%	10.2%
- Trip to other islands	--	3.3%	1.9%	2.3%	1.6%

* Tourists over 16 years old.

How do they book?



	2013	2014	2015	2016	2017
Accommodation booking					
Tour Operator	--	57.2%	47.9%	44.2%	44.3%
- Tour Operator's website	--	40.9%	62.6%	51.2%	53.4%
Accommodation	--	4.6%	10.4%	11.7%	8.6%
- Accommodation's website	--	78.9%	82.5%	89.3%	83.5%
Travel agency (High street)	--	31.1%	31.1%	29.4%	31.9%
Online Travel Agency (OTA)	--	6.2%	8.1%	13.1%	13.8%
No need to book accommodation	--	0.8%	2.5%	1.6%	1.4%
Flight booking					
Tour Operator	--	59.7%	49.0%	46.4%	48.3%
- Tour Operator's website	--	38.2%	59.7%	52.9%	51.4%
Airline	--	8.9%	18.1%	19.5%	18.9%
- Airline's website	--	73.7%	87.7%	88.7%	92.6%
Travel agency (High street)	--	28.8%	28.6%	28.8%	29.4%
Online Travel Agency (OTA)	--	2.6%	4.3%	5.3%	3.5%

How far in advance do they book their trip?



	2013	2014	2015	2016	2017
The same day they leave	--	1.8%	2.1%	1.3%	1.0%
Between 2 and 7 days	--	30.8%	29.6%	19.6%	17.8%
Between 8 and 15 days	--	15.1%	13.1%	14.4%	13.7%
Between 16 and 30 days	--	15.4%	13.9%	16.6%	13.8%
Between 31 and 90 days	--	19.8%	22.6%	23.9%	29.5%
More than 90 days	--	17.1%	18.7%	24.2%	24.2%

Who are they?



	2013	2014	2015	2016	2017
Gender					
Men	--	48.7%	51.1%	50.8%	53.4%
Women	--	51.3%	48.9%	49.2%	46.6%
Age					
Average age (tourists > 16 years old)	--	36.3	35.8	37.6	38.9
Standard deviation	--	10.9	10.7	12.5	12.3
Age range (> 16 years old)					
16-24 years old	--	9.0%	9.0%	9.3%	9.9%
25-30 years old	--	29.2%	31.0%	24.7%	20.5%
31-45 years old	--	42.4%	44.5%	44.7%	43.9%
46-60 years old	--	16.4%	12.0%	14.1%	17.6%
Over 60 years old	--	3.0%	3.5%	7.3%	8.1%
Occupation					
Business owner or self-employed	--	37.9%	39.4%	41.1%	40.6%
Upper/Middle management employee	--	37.6%	36.3%	31.0%	34.7%
Auxiliary level employee	--	13.8%	12.4%	12.8%	12.4%
Students	--	7.3%	5.9%	6.0%	6.0%
Retired	--	1.1%	3.3%	4.6%	4.2%
Unemployed / unpaid dom. work	--	2.2%	2.6%	4.5%	2.2%
Annual household income level					
€12,000 - €24,000	--	42.0%	41.6%	38.1%	38.7%
€24,001 - €36,000	--	24.2%	22.6%	23.0%	26.0%
€36,001 - €48,000	--	12.4%	16.9%	12.4%	13.7%
€48,001 - €60,000	--	11.0%	7.8%	10.4%	9.0%
€60,001 - €72,000	--	2.7%	5.7%	7.8%	3.1%
€72,001 - €84,000	--	1.6%	2.7%	0.0%	2.8%
More than €84,000	--	6.0%	2.7%	8.3%	6.6%

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Which island do they choose?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	--	22,422	25,311	14,218	45,239
- Fuerteventura	--	38,863	44,822	31,782	61,181
- Gran Canaria	--	18,833	18,905	26,077	50,769
- Tenerife	--	47,012	49,408	46,214	94,159
- La Palma	--	106	0	800	14,503

Where do they stay?

	2013	2014	2015	2016	2017
5* Hotel	--	2.5%	2.7%	3.9%	2.0%
4* Hotel	--	56.9%	52.4%	49.2%	52.3%
1-2-3* Hotel	--	22.6%	18.0%	20.5%	15.4%
Apartment	--	15.7%	22.3%	23.4%	27.2%
Property (privately-owned, friends, family)	--	1.5%	2.6%	1.1%	1.4%
Others	--	0.8%	2.0%	1.8%	1.7%

Who do they come with?

	2013	2014	2015	2016	2017
Unaccompanied	--	5.5%	5.8%	3.4%	4.8%
Only with partner	--	50.7%	47.7%	43.6%	44.3%
Only with children (under the age of 13)	--	2.1%	1.5%	1.0%	1.0%
Partner + children (under the age of 13)	--	12.8%	15.1%	14.1%	15.6%
Other relatives	--	5.8%	7.1%	8.1%	6.9%
Friends	--	6.6%	5.6%	5.4%	5.9%
Work colleagues	--	0.9%	1.2%	0.6%	0.6%
Other combinations ⁽¹⁾	--	15.6%	16.1%	23.8%	20.9%

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

How do they rate the Canary Islands?

Impression of their stay	2013	2014	2015	2016	2017
Good or very good (% tourists)	--	96.5%	96.6%	94.7%	95.5%
Average rating (scale 1-10)	--	9.22	9.25	9.05	9.31

How many are loyal to the Canary Islands?

Repeat tourists	2013	2014	2015	2016	2017
At least 1 previous visit	--	41.6%	37.7%	47.3%	47.0%
At least 10 previous visits	--	1.2%	1.1%	1.9%	2.4%

Where does the flight come from?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
Poland	--	87.2%	90.6%	84.3%	90.7%
United Kingdom	--	2.4%	3.0%	5.3%	3.6%
Germany	--	5.2%	3.0%	5.2%	3.0%
Spanish Mainland	--	2.1%	1.6%	3.2%	2.3%
Norway	--	0.4%	0.2%	0.3%	0.1%
Ireland	--	1.6%	0.4%	0.3%	0.1%
Belgium	--	0.0%	0.0%	0.4%	0.1%
Austria	--	0.3%	0.4%	0.0%	0.0%
Denmark	--	0.0%	0.0%	0.4%	0.0%
Others	--	0.9%	0.7%	0.6%	0.0%

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	--	17.6%	18.3%	11.9%	17.0%
- Fuerteventura	--	30.5%	32.4%	26.7%	23.0%
- Gran Canaria	--	14.8%	13.7%	21.9%	19.1%
- Tenerife	--	36.9%	35.7%	38.8%	35.4%
- La Palma	--	0.1%	0.0%	0.7%	5.5%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	--	89.1%	86.7%	85.2%	90.8%
Scenery	--	38.1%	42.8%	37.0%	42.0%
Beaches	--	39.3%	33.6%	30.8%	33.7%
Tranquility/rest/relaxation	--	34.1%	29.6%	27.9%	29.4%
Security	--	7.3%	16.0%	24.6%	23.6%
Visiting new places	--	29.8%	27.6%	24.0%	21.2%
Active tourism	--	7.7%	8.1%	10.6%	9.8%
Price	--	9.6%	8.5%	11.1%	6.5%
Quality of the environment	--	3.7%	6.2%	4.5%	4.8%
Suitable destination for children	--	5.9%	4.4%	5.2%	4.6%
Nautical activities	--	3.5%	4.3%	5.7%	4.0%
Ease of travel	--	2.7%	2.4%	3.3%	3.9%
Theme parks	--	5.0%	5.5%	2.2%	3.4%
Shopping	--	2.7%	3.5%	2.0%	3.3%
Nightlife/fun	--	3.3%	1.8%	2.0%	2.1%
Culture	--	2.5%	3.2%	1.8%	1.7%

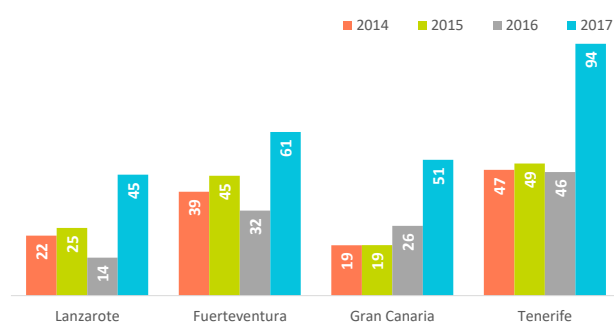
* Multi-choice question

What did motivate them to come?

Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	--	37.0%	31.5%	38.1%	40.6%
Recommendation by friends/relatives	--	34.7%	39.4%	35.2%	38.4%
The Canary Islands television channel	--	0.8%	0.6%	0.4%	0.4%
Other television or radio channels	--	4.9%	5.1%	3.8%	3.8%
Information in press/magazines/books	--	12.6%	11.6%	8.9%	10.7%
Attendance at a tourism fair	--	0.5%	0.0%	1.7%	0.9%
Tour Operator's brochure or catalogue	--	13.3%	10.1%	8.9%	8.3%
Recommendation by Travel Agency	--	21.6%	18.9%	20.5%	15.0%
Information obtained via the Internet	--	41.7%	45.0%	44.2%	43.6%
Senior Tourism programme	--	0.2%	0.3%	0.0%	0.0%
Others	--	4.0%	3.5%	4.0%	3.1%

* Multi-choice question

Tourist arrivals by islands (thousands)



Tourists over 16 years old.

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

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