

Tourist profile trend (2016)

Poland: Fourth Quarter

How many are they and how much do they spend?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	29,271	--	28,919	37,878	34,170
Average daily expenditure (€)	120.03	--	113.76	104.40	128.51
. in their place of residence	89.39	--	80.20	77.53	91.85
. in the Canary Islands	30.64	--	33.56	26.87	36.66
Average length of stay	8.45	--	8.59	7.79	7.70
Turnover per tourist (€)	996	--	884	776	951
Total turnover (> 16 years old) (€m)	29.2	--	25.6	29.4	32.5
Share of total turnover	21.4%	--	21.6%	22.9%	28.0%
Share of total tourist	20.9%	--	22.6%	27.3%	28.7%
Expenditure in the Canary Islands per tourist and trip (€) ^(*)					
Accommodation (**):	14.92	--	18.86	26.82	25.25
- Accommodation	14.92	--	13.99	26.61	24.71
- Additional accommodation expenses	0.00	--	4.87	0.21	0.55
Transport:	26.91	--	21.70	22.20	24.84
- Public transport	9.24	--	6.12	4.50	7.97
- Taxi	1.47	--	3.28	3.01	5.26
- Car rental	16.19	--	12.30	14.69	11.61
Food and drink:	78.59	--	58.89	54.80	57.52
- Food purchases at supermarkets	31.27	--	24.18	23.42	24.72
- Restaurants	47.31	--	34.71	31.39	32.80
Souvenirs:	63.80	--	98.29	37.59	72.41
Leisure:	44.96	--	55.95	52.59	82.11
- Organized excursions	21.42	--	31.25	24.30	46.01
- Leisure, amusement	4.17	--	10.02	8.17	12.34
- Trip to other islands	5.13	--	5.24	9.75	5.44
- Sporting activities	10.31	--	5.44	6.77	10.39
- Cultural activities	0.85	--	0.57	0.69	1.37
- Discos and disco-pubs	3.08	--	3.42	2.91	6.56
Others:	14.83	--	7.58	7.97	16.13
- Wellness	3.29	--	1.17	0.29	10.30
- Medical expenses	0.11	--	0.00	0.60	2.14
- Other expenses	11.43	--	6.41	7.08	3.69

How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	0.8%	--	2.9%	1.8%	0.7%
Between 2 and 7 days	24.8%	--	37.7%	25.2%	20.7%
Between 8 and 15 days	19.1%	--	16.1%	16.3%	18.0%
Between 16 and 30 days	21.8%	--	14.5%	14.4%	14.2%
Between 31 and 90 days	23.8%	--	20.8%	32.4%	29.6%
More than 90 days	9.7%	--	8.0%	9.9%	16.7%

What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	2.5%	--	2.2%	4.1%	2.2%
Flight and accommodation (room only)	12.0%	--	4.6%	11.2%	12.4%
Flight and accommodation (B&B)	1.1%	--	4.8%	3.8%	5.3%
Flight and accommodation (half board)	3.5%	--	3.7%	5.3%	6.6%
Flight and accommodation (full board)	17.2%	--	14.5%	8.0%	18.1%
Flight and accommodation (all inclusive)	63.8%	--	70.2%	67.5%	55.4%
% Tourists using low-cost airlines	48.8%	--	35.0%	58.6%	46.0%
Other expenses in their place of residence:					
- Car rental	13.8%	--	5.2%	9.9%	13.2%
- Sporting activities	7.1%	--	4.6%	6.9%	3.1%
- Excursions	5.3%	--	8.7%	4.7%	9.7%
- Trip to other islands	4.5%	--	5.4%	1.1%	3.4%

How do they book?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation booking					
Tour Operator	53.2%	--	57.6%	43.0%	39.5%
- Tour Operator's website	35.8%	--	14.3%	61.3%	56.2%
Accommodation	6.9%	--	5.6%	13.3%	11.9%
- Accommodation's website	100.0%	--	84.9%	86.8%	100.0%
Travel agency (High street)	29.9%	--	30.6%	30.9%	33.6%
Online Travel Agency (OTA)	7.6%	--	6.1%	11.0%	13.7%
No need to book accommodation	2.3%	--	0.0%	1.7%	1.3%

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight booking					
Tour Operator	52.2%	--	56.0%	43.6%	46.3%
- Tour Operator's website	41.9%	--	29.0%	46.1%	57.1%
Airline	11.3%	--	9.9%	24.7%	16.8%
- Airline's website	79.0%	--	77.7%	88.6%	100.0%
Travel agency (High street)	30.6%	--	32.7%	29.8%	33.0%
Online Travel Agency (OTA)	5.9%	--	1.4%	1.9%	4.0%

Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	8.7%	--	2.5%	1.7%	7.7%
4* Hotel	41.3%	--	57.2%	51.8%	38.1%
1-2-3* Hotel	23.6%	--	25.3%	16.4%	24.3%
Apartment	26.0%	--	12.2%	25.0%	28.1%
Property (privately-owned, friends, family)	0.5%	--	1.2%	2.1%	0.0%
Others	0.0%	--	1.6%	2.8%	1.8%

Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Gender					
Percentage of men	47.5%	--	46.1%	48.2%	52.1%
Percentage of women	52.5%	--	53.9%	51.8%	47.9%
Age					
Average age (tourists > 16 years old)	39.9	--	35.8	34.1	37.8
Standard deviation	13.0	--	9.9	11.6	14.5
Age range (> 16 years old)					
16-24 years old	2.2%	--	7.4%	9.3%	13.3%
25-30 years old	34.0%	--	30.9%	44.5%	25.3%
31-45 years old	30.9%	--	47.2%	33.4%	36.8%
46-60 years old	25.7%	--	12.8%	7.9%	14.4%
Over 60 years old	7.2%	--	1.7%	5.0%	10.1%
Occupation					
Business owner or self-employed	45.4%	--	40.6%	42.6%	36.5%
Upper/Middle management employee	41.9%	--	33.1%	32.9%	31.6%
Auxiliary level employee	5.6%	--	14.0%	12.4%	11.2%
Students	2.0%	--	5.7%	6.2%	8.4%
Retired	3.4%	--	2.5%	2.1%	7.4%
Unemployed / unpaid dom. work	1.7%	--	4.2%	3.8%	4.8%
Annual household income level					
€12,000 - €24,000	43.4%	--	48.5%	45.1%	42.9%
€24,001 - €36,000	24.6%	--	19.7%	23.6%	21.5%
€36,001 - €48,000	8.7%	--	11.8%	11.6%	15.0%
€48,001 - €60,000	4.8%	--	12.3%	6.4%	6.7%
€60,001 - €72,000	7.4%	--	1.1%	5.7%	6.4%
€72,001 - €84,000	1.9%	--	0.0%	3.6%	0.0%
More than €84,000	9.2%	--	6.5%	4.0%	7.5%

(*) 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.

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Which island do they choose?



Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	3,818	--	5,937	8,069	6,576
- Fuerteventura	9,682	--	7,807	10,554	8,245
- Gran Canaria	3,994	--	4,166	4,859	7,666
- Tenerife	10,545	--	10,764	14,159	11,683
- La Palma	1,232	--	106	0	0

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	13.0%	--	20.6%	21.4%	19.2%
- Fuerteventura	33.1%	--	27.1%	28.0%	24.1%
- Gran Canaria	13.6%	--	14.5%	12.9%	22.4%
- Tenerife	36.0%	--	37.4%	37.6%	34.2%
- La Palma	4.2%	--	0.4%	0.0%	0.0%

Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	8.0%	--	8.0%	6.1%	4.9%
Only with partner	54.6%	--	55.3%	53.1%	45.0%
Only with children (under the age of 13)	0.0%	--	1.2%	1.7%	1.4%
Partner + children (under the age of 13)	8.6%	--	13.9%	12.1%	7.8%
Other relatives	7.8%	--	5.0%	4.3%	12.1%
Friends	3.5%	--	3.1%	7.8%	8.7%
Work colleagues	0.6%	--	1.6%	0.9%	0.5%
Other combinations ⁽¹⁾	16.9%	--	11.9%	14.0%	19.6%

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

How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	86.5%	--	98.8%	96.9%	95.2%
Average rating (scale 1-10)	8.89	--	9.42	9.33	9.10

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	43.7%	--	47.3%	45.6%	62.2%
In love (at least 10 previous visits)	1.7%	--	2.7%	1.5%	4.7%

Where does the flight come from?



Ten main origin countries	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Poland	82.2%	--	91.4%	89.6%	84.0%
Germany	4.3%	--	3.6%	3.1%	4.8%
United Kingdom	1.6%	--	1.4%	2.4%	4.3%
Spanish Mainland	6.7%	--	3.6%	3.2%	3.4%
Belgium	0.0%	--	0.0%	0.0%	1.4%
France	0.0%	--	0.0%	0.0%	1.1%
Austria	0.0%	--	0.0%	0.9%	0.0%
Denmark	2.5%	--	0.0%	0.0%	0.0%
Ireland	0.0%	--	0.0%	0.0%	0.0%
Norway	1.9%	--	0.0%	0.8%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	94.4%	--	92.6%	91.6%	88.5%
Scenery	36.0%	--	41.4%	45.5%	33.9%
Beaches	34.1%	--	40.1%	32.1%	33.4%
Tranquility/rest/relaxation	29.5%	--	26.8%	35.3%	24.4%
Visiting new places	26.4%	--	32.1%	21.1%	23.9%
Security	14.1%	--	10.4%	15.3%	20.4%
Price	4.6%	--	13.9%	9.0%	11.7%
Active tourism	8.6%	--	7.1%	8.9%	10.3%
Suitable destination for children	4.0%	--	4.6%	4.0%	7.7%
Ease of travel	3.7%	--	4.3%	3.4%	6.9%
Security against natural catastrophes	0.0%	--	0.0%	0.0%	4.9%
Culture	0.4%	--	3.4%	2.3%	4.7%
Nautical activities	4.8%	--	4.3%	3.6%	4.0%
Quality of the environment	7.6%	--	1.2%	8.2%	3.1%
Shopping	1.9%	--	1.6%	2.8%	0.9%
Nightlife/fun	2.5%	--	0.8%	1.3%	0.9%

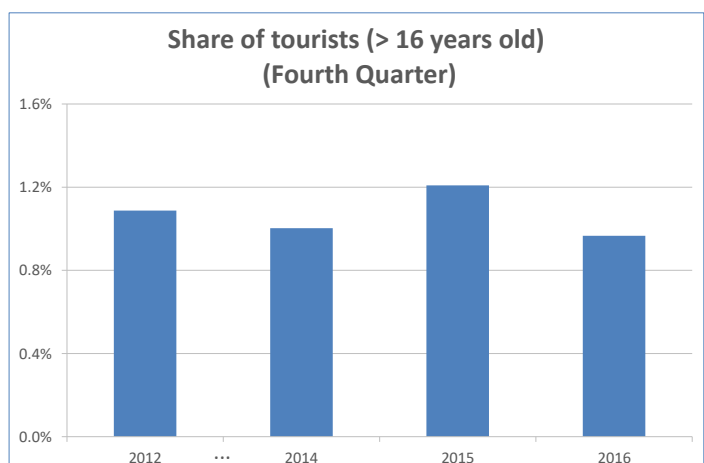
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	34.7%	--	36.0%	37.9%	51.9%
Recommendation by friends or relatives	42.3%	--	39.7%	45.4%	33.0%
The Canary Islands television channel	0.9%	--	2.7%	2.0%	0.0%
Other television or radio channels	3.8%	--	1.8%	2.6%	1.7%
Information in the press/magazines/books	10.0%	--	7.9%	10.4%	9.8%
Attendance at a tourism fair	1.5%	--	0.0%	0.0%	1.7%
Tour Operator's brochure or catalogue	12.3%	--	11.5%	4.6%	5.8%
Recommendation by Travel Agency	24.6%	--	29.0%	18.8%	17.6%
Information obtained via the Internet	36.7%	--	31.5%	37.3%	41.9%
Senior Tourism programme	0.0%	--	0.0%	0.9%	0.0%
Others	4.8%	--	5.5%	5.9%	1.2%

* Multi-choice question



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.