

Tourist profile trend (2016)

Poland: First Quarter

How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	32,340	--	22,134	30,393	27,970
Average daily expenditure (€)	113.13	--	109.52	103.10	120.26
. in their place of residence	80.94	--	77.40	75.72	92.48
. in the Canary Islands	32.19	--	32.12	27.38	27.78
Average length of stay	9.13	--	8.13	8.35	7.91
Turnover per tourist (€)	941	--	871	836	954
Total turnover (> 16 years old) (€m)	30.4	--	19.3	25.4	26.7
Share of total turnover	22.4%	--	16.2%	19.8%	23.0%
Share of total tourist	23.1%	--	17.3%	21.9%	23.5%

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

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation (**):	12.95	--	20.34	18.43	38.22
- Accommodation	12.72	--	19.56	16.20	35.49
- Additional accommodation expenses	0.23	--	0.78	2.23	2.73
Transport:	28.93	--	23.62	36.59	17.68
- Public transport	3.74	--	3.67	11.36	6.79
- Taxi	1.67	--	1.77	0.94	4.75
- Car rental	23.52	--	18.18	24.29	6.14
Food and drink:	42.96	--	59.33	45.19	69.66
- Food purchases at supermarkets	30.32	--	35.41	24.68	45.70
- Restaurants	12.64	--	23.91	20.52	23.96
Souvenirs:	108.35	--	61.54	82.56	49.80
Leisure:	48.29	--	71.78	45.87	42.24
- Organized excursions	31.10	--	33.72	23.27	24.17
- Leisure, amusement	7.29	--	10.69	4.61	7.59
- Trip to other islands	5.97	--	10.40	8.13	0.99
- Sporting activities	1.23	--	13.29	4.24	7.60
- Cultural activities	1.33	--	0.80	1.96	0.21
- Discos and disco-pubs	1.36	--	2.88	3.66	1.68
Others:	17.39	--	10.39	6.08	5.88
- Wellness	1.36	--	0.66	2.07	1.87
- Medical expenses	0.40	--	0.07	0.29	0.00
- Other expenses	15.63	--	9.65	3.72	4.01

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	0.0%	--	0.9%	3.6%	1.4%
Between 2 and 7 days	25.3%	--	25.1%	42.7%	16.7%
Between 8 and 15 days	14.0%	--	19.4%	11.6%	12.4%
Between 16 and 30 days	15.5%	--	11.8%	11.7%	15.7%
Between 31 and 90 days	29.6%	--	24.7%	19.5%	31.1%
More than 90 days	15.6%	--	18.1%	10.9%	22.7%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	3.7%	--	3.4%	6.1%	5.8%
Flight and accommodation (room only)	2.6%	--	7.8%	4.5%	14.3%
Flight and accommodation (B&B)	2.8%	--	0.0%	0.9%	6.5%
Flight and accommodation (half board)	4.8%	--	6.3%	2.9%	0.9%
Flight and accommodation (full board)	11.0%	--	11.0%	11.6%	13.8%
Flight and accommodation (all inclusive)	75.1%	--	71.5%	74.0%	58.7%
% Tourists using low-cost airlines	45.2%	--	44.6%	39.0%	55.2%
Other expenses in their place of residence:					
- Car rental	2.0%	--	2.7%	13.4%	12.7%
- Sporting activities	0.3%	--	2.1%	7.1%	1.7%
- Excursions	7.7%	--	6.5%	11.6%	9.4%
- Trip to other islands	2.6%	--	5.4%	0.5%	2.1%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	55.9%	--	62.3%	49.6%	54.7%
- Tour Operator's website	44.7%	--	37.9%	70.2%	52.5%
Accommodation	2.4%	--	3.3%	10.3%	11.6%
- Accommodation's website	67.1%	--	26.5%	90.0%	83.7%
Travel agency (High street)	30.9%	--	26.0%	30.4%	17.7%
Online Travel Agency (OTA)	7.2%	--	7.4%	6.6%	12.2%
No need to book accommodation	3.6%	--	1.0%	3.3%	3.8%

Flight booking

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tour Operator	61.1%	--	62.2%	57.1%	57.1%
- Tour Operator's website	33.2%	--	34.5%	71.6%	46.0%
Airline	3.9%	--	9.3%	13.9%	26.8%
- Airline's website	79.1%	--	85.7%	86.4%	93.4%
Travel agency (High street)	31.3%	--	24.6%	25.0%	14.1%
Online Travel Agency (OTA)	3.7%	--	3.9%	4.0%	2.1%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	3.5%	--	2.9%	2.7%	1.3%
4* Hotel	49.5%	--	62.2%	57.1%	50.0%
1-2-3* Hotel	23.2%	--	13.4%	17.5%	21.7%
Apartment	19.2%	--	18.8%	18.2%	21.0%
Property (privately-owned, friends, family)	2.4%	--	0.8%	2.7%	2.7%
Others	2.2%	--	1.8%	1.8%	3.3%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	42.4%	--	51.8%	57.8%	47.4%
Percentage of women	57.6%	--	48.2%	42.2%	52.6%

Age

Average age (tourists > 16 years old)	42.3	--	38.6	35.8	38.2
Standard deviation	12.9	--	12.5	9.9	11.5

Age range (> 16 years old)

16-24 years old	6.5%	--	8.8%	9.1%	5.8%
25-30 years old	18.6%	--	25.2%	24.9%	18.6%
31-45 years old	32.3%	--	37.0%	50.0%	56.0%
46-60 years old	33.5%	--	23.4%	13.3%	13.1%
Over 60 years old	9.1%	--	5.7%	2.6%	6.6%

Occupation

Business owner or self-employed	44.3%	--	37.4%	39.8%	49.6%
Upper/Middle management employee	33.3%	--	35.7%	38.9%	26.3%
Auxiliary level employee	5.7%	--	15.7%	9.1%	15.4%
Students	4.4%	--	8.6%	5.1%	5.0%
Retired	10.7%	--	1.0%	2.2%	0.0%
Unemployed / unpaid dom. work	1.5%	--	1.5%	4.9%	3.7%

Annual household income level

€12,000 - €24,000	39.4%	--	36.2%	43.8%	30.6%
€24,001 - €36,000	19.5%	--	21.0%	25.3%	29.6%
€36,001 - €48,000	15.4%	--	13.4%	21.8%	8.0%
€48,001 - €60,000	1.8%	--	17.3%	4.1%	14.7%
€60,001 - €72,000	9.3%	--	1.4%	4.9%	7.0%
€72,001 - €84,000	6.2%	--	2.0%	0.0%	0.0%
More than €84,000	8.4%	--	8.7%	0.0%	10.1%

(*) 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.

Tourist profile trend (2016)

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Which island do they choose?



Tourists (> 16 years old)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	3,552	--	4,803	5,127	3,797
- Fuerteventura	11,733	--	7,599	11,877	7,626
- Gran Canaria	4,936	--	2,720	2,585	4,526
- Tenerife	12,118	--	7,012	10,805	12,022
- La Palma	0	--	0	0	0

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	11.0%	--	21.7%	16.9%	13.6%
- Fuerteventura	36.3%	--	34.3%	39.1%	27.3%
- Gran Canaria	15.3%	--	12.3%	8.5%	16.2%
- Tenerife	37.5%	--	31.7%	35.5%	43.0%
- La Palma	0.0%	--	0.0%	0.0%	0.0%

Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	8.6%	--	5.5%	5.0%	2.4%
Only with partner	49.6%	--	51.8%	52.1%	31.3%
Only with children (under the age of 13)	3.5%	--	2.4%	0.4%	0.0%
Partner + children (under the age of 13)	9.8%	--	8.7%	12.4%	21.8%
Other relatives	4.6%	--	4.4%	4.5%	4.7%
Friends	5.8%	--	11.8%	6.0%	8.3%
Work colleagues	1.0%	--	0.0%	2.3%	1.9%
Other combinations ⁽¹⁾	17.1%	--	15.4%	17.4%	29.6%

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

How do they rate the destination?



Impression of their stay	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Good or very good (% tourists)	97.9%	--	95.3%	95.7%	93.5%
Average rating (scale 1-10)	9.25	--	9.09	9.17	9.02

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	52.4%	--	52.6%	43.0%	49.4%
In love (at least 10 previous visits)	3.5%	--	1.5%	1.3%	1.3%

Where does the flight come from?



Ten main origin countries	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Poland	87.4%	--	83.5%	87.0%	86.4%
United Kingdom	0.0%	--	5.5%	3.5%	7.4%
Germany	9.2%	--	6.1%	6.9%	5.7%
Spanish Mainland	2.3%	--	1.8%	0.0%	0.5%
Austria	0.0%	--	0.0%	0.8%	0.0%
Belgium	0.4%	--	0.0%	0.0%	0.0%
Netherlands	0.0%	--	0.0%	0.8%	0.0%
Ireland	0.3%	--	0.9%	1.0%	0.0%
Norway	0.0%	--	1.2%	0.0%	0.0%
Switzerland	0.0%	--	0.9%	0.0%	0.0%

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	94.9%	--	92.8%	88.2%	90.3%
Scenery	32.8%	--	33.9%	44.6%	35.6%
Tranquillity/rest/relaxation	31.4%	--	35.9%	23.7%	33.8%
Security	17.1%	--	5.8%	7.0%	28.6%
Visiting new places	24.4%	--	29.2%	20.4%	22.2%
Price	12.7%	--	9.6%	14.6%	19.8%
Beaches	26.6%	--	35.2%	35.5%	19.3%
Active tourism	9.5%	--	9.8%	9.7%	14.8%
Quality of the environment	4.9%	--	4.2%	6.7%	6.2%
Nautical activities	2.3%	--	3.0%	5.9%	5.6%
Suitable destination for children	9.4%	--	7.5%	3.6%	5.1%
Ease of travel	4.2%	--	4.9%	4.5%	3.9%
Security against natural catastrophes	0.0%	--	1.7%	0.0%	3.8%
Nightlife/fun	2.4%	--	5.3%	0.9%	3.3%
Theme parks	0.9%	--	4.7%	2.9%	1.1%
Shopping	0.8%	--	5.2%	6.7%	1.0%

* Multi-choice question

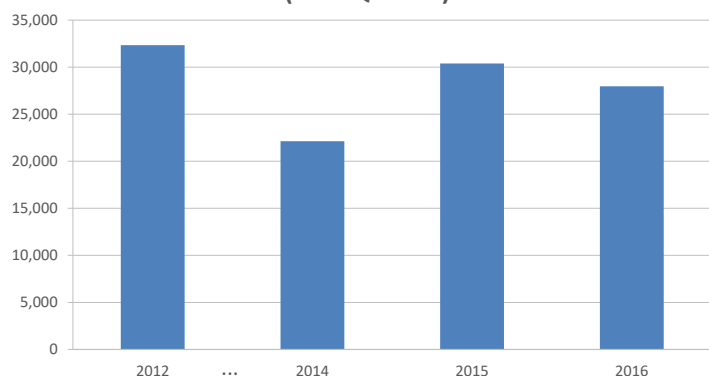
What did motivate them to come?



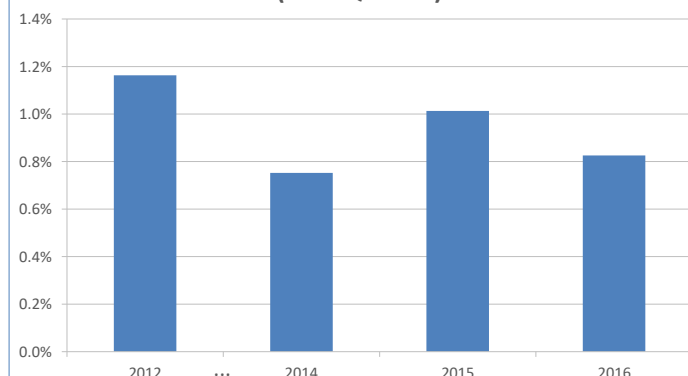
Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	41.0%	--	48.6%	35.7%	41.7%
Recommendation by friends or relatives	36.1%	--	31.0%	26.8%	35.8%
The Canary Islands television channel	0.0%	--	0.0%	0.0%	0.7%
Other television or radio channels	2.8%	--	4.2%	5.1%	4.7%
Information in the press/magazines/books	7.2%	--	9.0%	11.4%	9.0%
Attendance at a tourism fair	0.9%	--	2.8%	0.0%	3.7%
Tour Operator's brochure or catalogue	9.1%	--	8.7%	9.7%	5.2%
Recommendation by Travel Agency	23.5%	--	20.1%	16.1%	21.3%
Information obtained via the Internet	41.5%	--	42.7%	49.8%	42.4%
Senior Tourism programme	0.0%	--	1.1%	0.0%	0.0%
Others	1.9%	--	3.4%	3.0%	8.2%

* Multi-choice question

Tourist arrivals trend (> 16 years old)
(First Quarter)



Share of tourists (> 16 years old)
(First Quarter)



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.