

Tourist profile trend (2016)

Poland: Second Quarter

How many are they and how much do they spend?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Tourist arrivals (> 16 years old)	32,175	--	34,779	28,470	23,110
Average daily expenditure (€)	115.17	--	115.57	108.49	128.39
. in their place of residence	83.82	--	84.81	77.53	92.17
. in the Canary Islands	31.34	--	30.76	30.96	36.22
Average length of stay	7.68	--	7.97	9.00	8.30
Turnover per tourist (€)	869	--	885	920	990
Total turnover (> 16 years old) (€m)	28.0	--	30.8	26.2	22.9
Share of total turnover	20.6%	--	25.9%	20.4%	19.7%
Share of total tourist	22.9%	--	27.2%	20.5%	19.4%

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

	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Accommodation (**):	13.82	--	11.68	56.69	45.02
- Accommodation	12.46	--	11.20	56.40	42.94
- Additional accommodation expenses	1.35	--	0.48	0.29	2.08
Transport:	22.54	--	28.05	37.06	17.06
- Public transport	3.15	--	8.49	13.18	2.21
- Taxi	4.46	--	3.81	3.16	2.04
- Car rental	14.93	--	15.74	20.71	12.81
Food and drink:	50.62	--	63.15	90.70	55.48
- Food purchases at supermarkets	22.38	--	37.40	61.87	36.94
- Restaurants	28.24	--	25.75	28.83	18.54
Souvenirs:	76.64	--	71.18	44.29	69.38
Leisure:	58.73	--	50.06	76.29	64.49
- Organized excursions	38.99	--	30.46	50.04	37.51
- Leisure, amusement	10.07	--	10.65	7.55	4.85
- Trip to other islands	1.50	--	3.97	5.59	0.61
- Sporting activities	4.08	--	0.92	7.50	14.78
- Cultural activities	0.79	--	2.35	0.68	3.80
- Discos and disco-pubs	3.29	--	1.73	4.93	2.94
Others:	15.60	--	11.06	6.28	18.57
- Wellness	0.90	--	0.37	0.23	9.58
- Medical expenses	0.31	--	0.21	0.60	0.15
- Other expenses	14.40	--	10.49	5.45	8.83

How far in advance do they book their trip?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
The same day they leave	0.0%	--	0.0%	1.8%	3.2%
Between 2 and 7 days	16.7%	--	28.7%	30.4%	12.1%
Between 8 and 15 days	12.5%	--	17.4%	11.8%	14.3%
Between 16 and 30 days	13.5%	--	20.7%	15.5%	21.8%
Between 31 and 90 days	31.8%	--	22.6%	17.5%	17.2%
More than 90 days	25.5%	--	10.6%	23.0%	31.5%

What do they book at their place of residence?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Flight only	1.3%	--	2.6%	4.8%	8.0%
Flight and accommodation (room only)	4.0%	--	9.5%	12.4%	6.2%
Flight and accommodation (B&B)	2.5%	--	2.2%	0.9%	0.6%
Flight and accommodation (half board)	1.4%	--	1.5%	6.8%	3.8%
Flight and accommodation (full board)	17.5%	--	14.7%	8.3%	8.0%
Flight and accommodation (all inclusive)	73.3%	--	69.5%	66.9%	73.5%
% Tourists using low-cost airlines	32.9%	--	37.2%	61.2%	57.5%
Other expenses in their place of residence:					
- Car rental	1.0%	--	8.4%	14.2%	19.8%
- Sporting activities	3.5%	--	7.7%	13.5%	8.2%
- Excursions	5.4%	--	14.2%	15.5%	13.7%
- Trip to other islands	1.2%	--	1.7%	6.4%	0.0%

How do they book?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Accommodation booking					
Tour Operator	63.0%	--	53.5%	47.8%	40.8%
- Tour Operator's website	33.5%	--	59.0%	52.2%	60.8%
Accommodation	1.4%	--	4.8%	14.8%	16.7%
- Accommodation's website	100.0%	--	82.8%	74.0%	74.8%
Travel agency (High street)	32.4%	--	33.0%	29.6%	30.4%
Online Travel Agency (OTA)	3.3%	--	7.0%	6.2%	12.2%
No need to book accommodation	0.0%	--	1.7%	1.5%	0.0%

Flight booking

	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Tour Operator	55.2%	--	54.0%	47.9%	46.9%
- Tour Operator's website	35.6%	--	44.0%	50.5%	58.2%
Airline	4.8%	--	10.0%	23.1%	16.7%
- Airline's website	100.0%	--	77.4%	82.4%	89.6%
Travel agency (High street)	37.5%	--	33.1%	21.9%	30.6%
Online Travel Agency (OTA)	2.5%	--	3.0%	7.1%	5.9%

Where do they stay?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
5* Hotel	7.0%	--	2.1%	2.8%	3.6%
4* Hotel	60.2%	--	55.6%	47.2%	58.9%
1-2-3* Hotel	17.3%	--	25.8%	22.4%	12.8%
Apartment	13.7%	--	14.9%	23.5%	21.6%
Property (privately-owned, friends, family)	0.0%	--	1.7%	1.3%	1.1%
Others	1.7%	--	0.0%	2.7%	2.1%

Who are they?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Gender					
Percentage of men	52.5%	--	47.2%	50.2%	55.3%
Percentage of women	47.5%	--	52.8%	49.8%	44.7%

Age

Average age (tourists > 16 years old)	38.0	--	37.1	35.9	38.6
Standard deviation	12.4	--	11.0	10.9	12.3

Age range (> 16 years old)

16-24 years old	6.7%	--	3.9%	11.3%	3.7%
25-30 years old	27.1%	--	31.8%	27.9%	29.8%
31-45 years old	41.6%	--	42.4%	42.2%	48.4%
46-60 years old	18.4%	--	18.4%	15.8%	9.8%
Over 60 years old	6.2%	--	3.5%	2.7%	8.3%

Occupation

Business owner or self-employed	38.6%	--	41.8%	43.9%	39.9%
Upper/Middle management employee	40.6%	--	39.7%	26.9%	32.5%
Auxiliary level employee	9.5%	--	12.2%	12.6%	13.5%
Students	6.3%	--	4.2%	10.3%	2.2%
Retired	2.9%	--	0.5%	4.4%	4.5%
Unemployed / unpaid dom. work	2.1%	--	1.6%	2.0%	7.6%

Annual household income level

€12,000 - €24,000	31.0%	--	37.9%	43.0%	35.9%
€24,001 - €36,000	29.9%	--	23.7%	10.7%	23.2%
€36,001 - €48,000	16.4%	--	13.5%	23.2%	15.8%
€48,001 - €60,000	7.3%	--	12.9%	8.8%	9.0%
€60,001 - €72,000	7.2%	--	2.8%	8.2%	10.1%
€72,001 - €84,000	3.1%	--	2.3%	4.5%	0.0%
More than €84,000	5.1%	--	6.8%	1.5%	6.0%

(*) 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)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	2,942	--	4,984	6,093	627
- Fuerteventura	13,486	--	11,173	10,848	5,395
- Gran Canaria	5,994	--	4,663	4,013	5,251
- Tenerife	9,474	--	13,959	7,516	11,837
- La Palma	279	--	0	0	0

Share (%)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	9.1%	--	14.3%	21.4%	2.7%
- Fuerteventura	41.9%	--	32.1%	38.1%	23.3%
- Gran Canaria	18.6%	--	13.4%	14.1%	22.7%
- Tenerife	29.4%	--	40.1%	26.4%	51.2%
- La Palma	0.9%	--	0.0%	0.0%	0.0%

Who do they come with?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Unaccompanied	1.3%	--	6.9%	5.3%	1.1%
Only with partner	52.5%	--	51.6%	41.2%	54.3%
Only with children (under the age of 13)	1.0%	--	2.0%	1.4%	0.0%
Partner + children (under the age of 13)	17.0%	--	10.2%	13.7%	11.6%
Other relatives	7.8%	--	7.5%	11.9%	7.3%
Friends	5.0%	--	5.7%	7.7%	1.9%
Work colleagues	0.9%	--	2.1%	2.1%	0.0%
Other combinations ⁽¹⁾	14.5%	--	13.9%	16.6%	23.9%

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

How do they rate the destination?



Impression of their stay	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Good or very good (% tourists)	90.9%	--	96.9%	97.4%	96.4%
Average rating (scale 1-10)	8.89	--	9.24	9.23	9.15

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Repeat tourists	29.0%	--	40.7%	33.3%	52.9%
In love (at least 10 previous visits)	0.2%	--	0.6%	1.4%	0.0%

Where does the flight come from?



Ten main origin countries	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Poland	82.3%	--	83.3%	87.0%	81.3%
United Kingdom	4.4%	--	2.7%	6.1%	7.3%
Germany	8.3%	--	5.3%	3.0%	5.0%
Spanish Mainland	1.9%	--	2.4%	2.2%	2.9%
Denmark	0.0%	--	0.0%	0.0%	2.1%
Norway	0.0%	--	0.0%	0.0%	1.4%
Austria	1.8%	--	1.0%	0.0%	0.0%
Belgium	0.0%	--	0.0%	0.0%	0.0%
Ireland	1.2%	--	3.7%	1.0%	0.0%
Italy	0.0%	--	0.7%	0.0%	0.0%

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Climate/sun	89.9%	--	88.4%	83.9%	86.8%
Scenery	32.2%	--	39.6%	35.9%	43.7%
Tranquillity/rest/relaxation	34.7%	--	39.4%	26.7%	27.7%
Security	10.1%	--	7.8%	16.0%	26.9%
Visiting new places	35.7%	--	27.5%	39.8%	24.6%
Beaches	32.6%	--	35.9%	25.4%	22.0%
Nautical activities	4.5%	--	2.8%	7.0%	10.8%
Quality of the environment	2.2%	--	3.2%	6.9%	8.6%
Price	9.6%	--	8.9%	8.9%	7.9%
Active tourism	6.3%	--	8.2%	8.1%	7.2%
Theme parks	4.6%	--	5.9%	4.4%	3.8%
Suitable destination for children	5.8%	--	4.3%	5.4%	3.4%
Security against natural catastrophes	0.0%	--	1.5%	0.9%	1.3%
Culture	0.9%	--	3.0%	6.9%	1.2%
Nightlife/fun	1.0%	--	1.1%	3.0%	1.2%
Ease of travel	5.3%	--	2.9%	1.7%	0.5%

* Multi-choice question

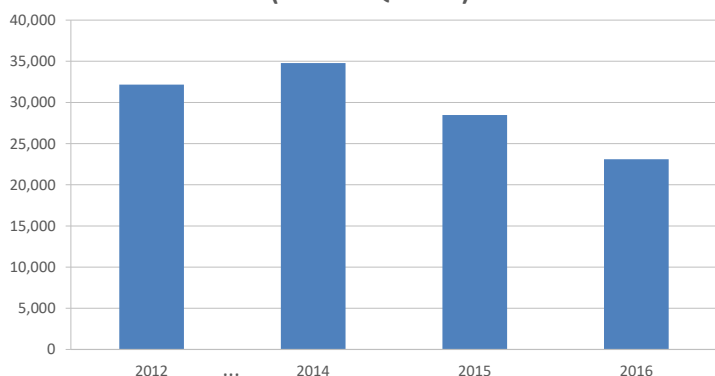
What did motivate them to come?



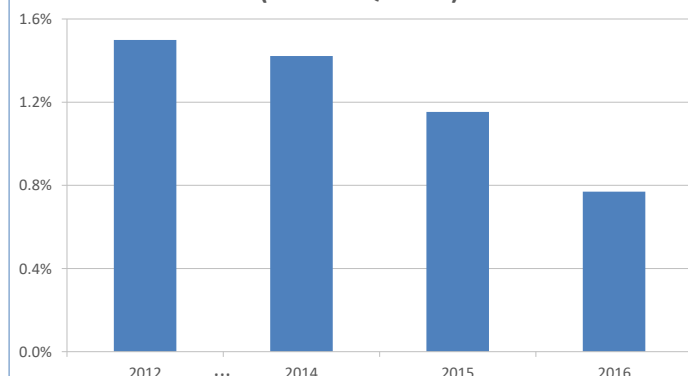
Aspects motivating the choice	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Previous visits to the Canary Islands	26.1%	--	37.2%	28.1%	35.5%
Recommendation by friends or relatives	44.4%	--	30.8%	43.2%	33.1%
The Canary Islands television channel	0.0%	--	0.0%	0.0%	0.0%
Other television or radio channels	0.7%	--	8.8%	5.3%	3.1%
Information in the press/magazines/books	16.4%	--	12.2%	11.4%	4.0%
Attendance at a tourism fair	0.9%	--	0.0%	0.0%	0.0%
Tour Operator's brochure or catalogue	15.3%	--	14.5%	12.7%	17.1%
Recommendation by Travel Agency	29.3%	--	17.2%	25.4%	20.9%
Information obtained via the Internet	36.6%	--	48.6%	45.0%	51.0%
Senior Tourism programme	0.9%	--	0.0%	0.5%	0.0%
Others	2.9%	--	4.2%	0.6%	2.1%

* Multi-choice question

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



Share of tourists (> 16 years old)
(Second 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.