

## Tourist profile trend (2016)

### Poland: Third Quarter

#### How many are they and how much do they spend?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Tourist arrivals (> 16 years old)	46,428	--	41,847	41,942	33,839
Average daily expenditure (€)	119.90	--	114.96	128.27	117.63
. in their place of residence	90.68	--	88.86	93.50	89.15
. in the Canary Islands	29.22	--	26.11	34.76	28.47
Average length of stay	9.32	--	9.42	9.27	8.92
Turnover per tourist (€)	1,043	--	1,028	1,127	1,005
Total turnover (> 16 years old) (€m)	48.4	--	43.0	47.3	34.0
Share of total turnover	35.6%	--	36.3%	36.9%	29.3%
Share of total tourist	33.1%	--	32.8%	30.2%	28.4%

#### Expenditure in the Canary Islands per tourist and trip (€) <sup>(\*)</sup>

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Accommodation (**):</b>	15.76	--	16.32	21.05	24.83
- Accommodation	12.80	--	15.66	18.20	24.83
- Additional accommodation expenses	2.96	--	0.66	2.85	0.00
<b>Transport:</b>	23.46	--	23.77	32.31	23.48
- Public transport	6.14	--	5.40	6.61	7.08
- Taxi	3.31	--	1.94	3.32	4.62
- Car rental	14.00	--	16.44	22.38	11.79
<b>Food and drink:</b>	52.56	--	61.06	83.00	72.39
- Food purchases at supermarkets	23.70	--	34.77	41.01	38.82
- Restaurants	28.86	--	26.29	41.99	33.58
<b>Souvenirs:</b>	70.40	--	69.38	112.41	72.49
<b>Leisure:</b>	72.97	--	64.74	65.56	38.65
- Organized excursions	45.96	--	45.08	36.29	24.07
- Leisure, amusement	6.77	--	9.75	13.41	3.20
- Trip to other islands	7.23	--	1.48	5.53	4.47
- Sporting activities	7.30	--	6.63	5.07	3.53
- Cultural activities	0.52	--	0.77	0.59	1.82
- Discos and disco-pubs	5.18	--	1.03	4.66	1.57
<b>Others:</b>	12.69	--	7.80	10.85	6.52
- Wellness	1.77	--	1.51	1.74	1.93
- Medical expenses	2.29	--	0.22	1.87	0.14
- Other expenses	8.63	--	6.07	7.25	4.46

#### How far in advance do they book their trip?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
The same day they leave	1.2%	--	2.9%	1.5%	0.7%
Between 2 and 7 days	22.8%	--	30.8%	23.5%	26.1%
Between 8 and 15 days	10.2%	--	10.3%	12.2%	12.6%
Between 16 and 30 days	11.4%	--	13.5%	14.1%	16.3%
Between 31 and 90 days	19.6%	--	14.2%	19.8%	16.3%
More than 90 days	34.7%	--	28.3%	28.9%	28.1%

#### What do they book at their place of residence?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight only	3.1%	--	4.5%	5.7%	2.1%
Flight and accommodation (room only)	4.0%	--	3.5%	11.6%	9.5%
Flight and accommodation (B&B)	0.6%	--	1.7%	2.9%	5.0%
Flight and accommodation (half board)	2.9%	--	2.2%	4.3%	1.9%
Flight and accommodation (full board)	18.7%	--	15.3%	9.8%	9.0%
Flight and accommodation (all inclusive)	70.7%	--	72.8%	65.7%	72.6%
<b>% Tourists using low-cost airlines</b>	37.3%	--	42.1%	50.9%	52.6%
<b>Other expenses in their place of residence:</b>					
- Car rental	3.4%	--	3.1%	10.8%	9.1%
- Sporting activities	1.9%	--	3.5%	5.8%	5.9%
- Excursions	5.1%	--	8.9%	8.1%	11.0%
- Trip to other islands	0.8%	--	2.3%	0.5%	3.1%

#### How do they book?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Accommodation booking</b>					
<b>Tour Operator</b>	56.5%	--	57.4%	51.0%	42.3%
- Tour Operator's website	30.1%	--	46.5%	63.9%	41.0%
<b>Accommodation</b>	3.5%	--	4.4%	5.2%	8.3%
- Accommodation's website	68.2%	--	90.0%	77.3%	100.0%
<b>Travel agency (High street)</b>	35.0%	--	32.6%	32.7%	34.5%
<b>Online Travel Agency (OTA)</b>	3.1%	--	5.0%	8.0%	13.8%
<b>No need to book accommodation</b>	1.9%	--	0.6%	3.1%	1.1%

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Flight booking</b>					
<b>Tour Operator</b>	59.8%	--	65.9%	48.6%	37.5%
- Tour Operator's website	26.6%	--	40.9%	66.5%	52.6%
<b>Airline</b>	7.4%	--	7.0%	11.9%	18.3%
- Airline's website	75.1%	--	57.4%	94.2%	72.5%
<b>Travel agency (High street)</b>	29.3%	--	24.7%	34.7%	35.5%
<b>Online Travel Agency (OTA)</b>	3.5%	--	2.5%	4.8%	8.7%

#### Where do they stay?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
5* Hotel	2.7%	--	2.6%	3.5%	2.5%
4* Hotel	44.5%	--	55.0%	53.1%	53.1%
1-2-3* Hotel	23.7%	--	23.0%	16.7%	21.0%
Apartment	26.5%	--	17.1%	22.1%	21.8%
Property (privately-owned, friends, family)	1.9%	--	2.0%	3.8%	1.0%
Others	0.8%	--	0.3%	0.8%	0.6%

#### Who are they?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Gender</b>					
Percentage of men	48.1%	--	50.1%	49.6%	49.0%
Percentage of women	51.9%	--	49.9%	50.4%	51.0%
<b>Age</b>					
Average age (tourists > 16 years old)	35.5	--	34.8	37.1	36.3
Standard deviation	11.2	--	10.4	10.3	10.9
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	18.2%	--	14.3%	7.1%	11.8%
25-30 years old	22.5%	--	28.0%	25.4%	25.7%
31-45 years old	39.3%	--	42.0%	52.0%	40.7%
46-60 years old	18.2%	--	13.7%	12.2%	17.6%
Over 60 years old	1.9%	--	2.0%	3.3%	4.2%
<b>Occupation</b>					
Business owner or self-employed	30.1%	--	32.8%	33.6%	39.7%
Upper/Middle management employee	41.3%	--	39.8%	43.6%	33.1%
Auxiliary level employee	12.3%	--	14.2%	14.6%	11.7%
Students	13.3%	--	10.7%	3.4%	7.4%
Retired	1.0%	--	0.6%	4.2%	5.6%
Unemployed / unpaid dom. work	2.0%	--	1.9%	0.6%	2.5%
<b>Annual household income level</b>					
€12,000 - €24,000	44.7%	--	45.2%	36.4%	42.1%
€24,001 - €36,000	23.8%	--	29.2%	26.9%	17.9%
€36,001 - €48,000	10.2%	--	11.3%	13.8%	11.4%
€48,001 - €60,000	4.8%	--	4.9%	10.9%	11.3%
€60,001 - €72,000	6.3%	--	4.5%	5.0%	8.2%
€72,001 - €84,000	3.9%	--	1.6%	2.8%	0.0%
More than €84,000	6.3%	--	3.4%	4.2%	9.2%

(\*) 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)

### Poland: Third Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	4,598	--	6,698	6,022	3,218
- Fuerteventura	16,736	--	12,283	11,543	10,516
- Gran Canaria	7,778	--	7,284	7,448	8,634
- Tenerife	17,104	--	15,277	16,929	10,671
- La Palma	212	--	0	0	800

Share (%)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	9.9%	--	16.1%	14.4%	9.5%
- Fuerteventura	36.0%	--	29.6%	27.5%	31.1%
- Gran Canaria	16.8%	--	17.5%	17.8%	25.5%
- Tenerife	36.8%	--	36.8%	40.4%	31.5%
- La Palma	0.5%	--	0.0%	0.0%	2.4%

#### Who do they come with?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Unaccompanied	2.9%	--	2.5%	6.4%	4.5%
Only with partner	42.0%	--	46.1%	44.2%	45.2%
Only with children (under the age of 13)	2.6%	--	2.5%	2.0%	2.1%
Partner + children (under the age of 13)	20.7%	--	16.4%	20.8%	16.0%
Other relatives	7.1%	--	5.6%	8.1%	7.2%
Friends	3.8%	--	7.0%	1.9%	2.1%
Work colleagues	0.7%	--	0.0%	0.0%	0.0%
Other combinations <sup>(1)</sup>	20.2%	--	19.8%	16.6%	23.0%

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

#### How do they rate the destination?



Impression of their stay	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Good or very good (% tourists)	94.9%	--	95.3%	96.4%	94.2%
Average rating (scale 1-10)	9.10	--	9.16	9.27	8.96

#### How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Repeat tourists	27.6%	--	32.5%	30.0%	27.1%
In love (at least 10 previous visits)	1.2%	--	0.5%	0.6%	0.9%

#### Where does the flight come from?



Ten main origin countries	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Poland	91.8%	--	89.4%	96.4%	84.9%
Spanish Mainland	1.7%	--	0.9%	1.0%	5.3%
Germany	3.6%	--	5.8%	0.0%	5.3%
United Kingdom	0.4%	--	1.0%	1.2%	3.2%
Ireland	0.0%	--	1.3%	0.0%	1.2%
Belgium	0.7%	--	0.0%	0.0%	0.0%
Netherlands	0.0%	--	0.6%	0.0%	0.0%
Norway	0.6%	--	0.5%	0.0%	0.0%
Switzerland	0.0%	--	0.4%	0.0%	0.0%
Austria	0.0%	--	0.0%	0.0%	0.0%

#### Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Climate/sun	81.8%	--	85.5%	83.0%	76.7%
Beaches	38.3%	--	43.7%	39.0%	43.8%
Scenery	38.7%	--	36.7%	43.8%	36.9%
Tranquility/rest/relaxation	35.2%	--	33.8%	30.5%	26.9%
Suitable destination for children	36.2%	--	30.4%	30.3%	25.3%
Security	5.8%	--	5.7%	23.2%	24.0%
Active tourism	13.2%	--	6.5%	6.3%	9.8%
Shopping	1.7%	--	2.8%	3.4%	5.4%
Price	8.0%	--	7.2%	3.5%	5.4%
Nautical activities	3.0%	--	3.8%	2.0%	4.0%
Suitable destination for children	6.3%	--	7.2%	4.6%	3.8%
Theme parks	4.9%	--	7.3%	8.4%	3.3%
Nightlife/fun	3.5%	--	5.6%	2.2%	2.4%
Health-related tourism	0.6%	--	0.0%	0.0%	2.0%
Security against natural catastrophes	1.2%	--	0.0%	1.2%	1.8%
Quality of the environment	4.9%	--	5.5%	3.4%	1.8%

\* Multi-choice question

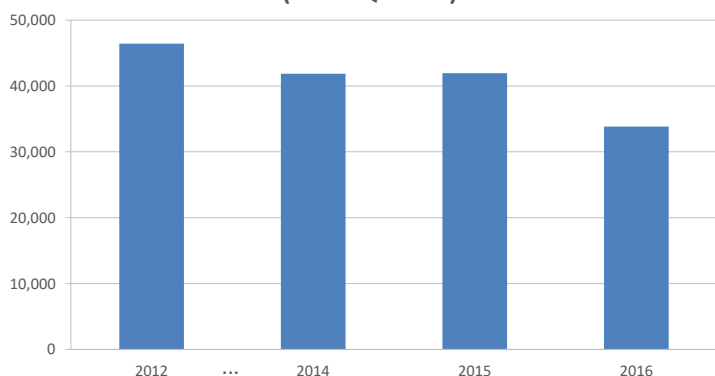
#### What did motivate them to come?



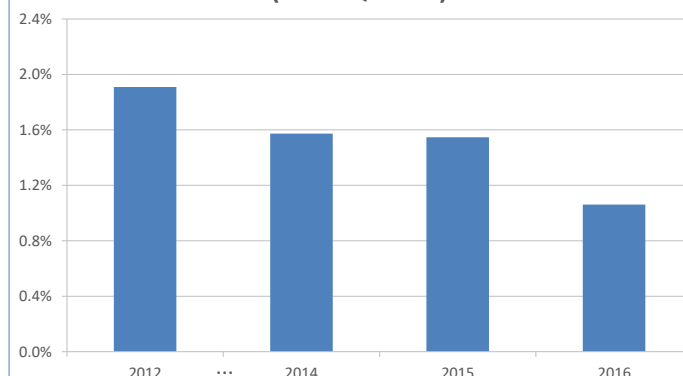
Aspects motivating the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Previous visits to the Canary Islands	22.2%	--	31.4%	24.9%	22.6%
Recommendation by friends or relatives	33.3%	--	36.4%	40.7%	38.4%
The Canary Islands television channel	0.6%	--	0.7%	0.0%	0.7%
Other television or radio channels	6.5%	--	4.2%	7.4%	5.6%
Information in the press/magazines/books	14.8%	--	18.1%	12.9%	11.4%
Attendance at a tourism fair	1.5%	--	0.0%	0.0%	1.2%
Tour Operator's brochure or catalogue	20.0%	--	16.1%	13.7%	9.5%
Recommendation by Travel Agency	22.9%	--	20.9%	16.6%	22.6%
Information obtained via the Internet	42.2%	--	42.3%	48.6%	43.5%
Senior Tourism programme	0.0%	--	0.0%	0.0%	0.0%
Others	5.2%	--	3.1%	3.5%	4.6%

\* Multi-choice question

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



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