

# Tourist profile trend (2017)

## Poland: Third Quarter

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



|                                      | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|--------------------------------------|--------|--------|--------|--------|--------|
| Tourist arrivals (> 16 years old)    | --     | 41,847 | 41,942 | 33,839 | 76,135 |
| Average daily expenditure (€)        | --     | 114.96 | 128.27 | 117.63 | 132.43 |
| . in their place of residence        | --     | 88.86  | 93.50  | 89.15  | 101.87 |
| . in the Canary Islands              | --     | 26.11  | 34.76  | 28.47  | 30.56  |
| Average length of stay               | --     | 9.42   | 9.27   | 8.92   | 8.22   |
| Turnover per tourist (€)             | --     | 1,028  | 1,127  | 1,005  | 1,029  |
| Total turnover (> 16 years old) (€m) | --     | 43.0   | 47.3   | 34.0   | 78.4   |
| Share of total turnover              | --     | 36.3%  | 36.9%  | 29.3%  | --     |
| Share of total tourist               | --     | 32.8%  | 30.2%  | 28.4%  | --     |

| Expenditure in the Canary Islands per tourist and trip (€) (*) |    |       |        |       |       |
|--|----|-------|--------|-------|-------|
| <b>Accommodation (**):</b>                                     | -- | 16.32 | 21.05  | 24.83 | 25.40 |
| - Accommodation  | -- | 15.66 | 18.20  | 24.83 | 22.17 |
| - Additional accommodation expenses                            | -- | 0.66  | 2.85   | 0.00  | 3.23  |
| <b>Transport:</b>  | -- | 23.77 | 32.31  | 23.48 | 20.73 |
| - Public transport   | -- | 5.40  | 6.61   | 7.08  | 8.56  |
| - Taxi   | -- | 1.94  | 3.32   | 4.62  | 1.74  |
| - Car rental   | -- | 16.44 | 22.38  | 11.79 | 10.43 |
| <b>Food and drink:</b>   | -- | 61.06 | 83.00  | 72.39 | 55.77 |
| - Food purchases at supermarkets                               | -- | 34.77 | 41.01  | 38.82 | 21.74 |
| - Restaurants  | -- | 26.29 | 41.99  | 33.58 | 34.03 |
| <b>Souvenirs:</b>  | -- | 69.38 | 112.41 | 72.49 | 69.89 |
| <b>Leisure:</b>  | -- | 64.74 | 65.56  | 38.65 | 66.24 |
| - Organized excursions   | -- | 45.08 | 36.29  | 24.07 | 41.25 |
| - Leisure, amusement   | -- | 9.75  | 13.41  | 3.20  | 7.26  |
| - Trip to other islands  | -- | 1.48  | 5.53   | 4.47  | 5.26  |
| - Sporting activities  | -- | 6.63  | 5.07   | 3.53  | 8.31  |
| - Cultural activities  | -- | 0.77  | 0.59   | 1.82  | 2.02  |
| - Discos and disco-pubs  | -- | 1.03  | 4.66   | 1.57  | 2.14  |
| <b>Others:</b>   | -- | 7.80  | 10.85  | 6.52  | 10.42 |
| - Wellness   | -- | 1.51  | 1.74   | 1.93  | 0.98  |
| - Medical expenses   | -- | 0.22  | 1.87   | 0.14  | 0.48  |
| - Other expenses   | -- | 6.07  | 7.25   | 4.46  | 8.95  |

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



|                         | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|-------------------------|--------|--------|--------|--------|--------|
| The same day they leave | --     | 2.9%   | 1.5%   | 0.7%   | 0.5%   |
| Between 2 and 7 days    | --     | 30.8%  | 23.5%  | 26.1%  | 27.7%  |
| Between 8 and 15 days   | --     | 10.3%  | 12.2%  | 12.6%  | 10.5%  |
| Between 16 and 30 days  | --     | 13.5%  | 14.1%  | 16.3%  | 11.0%  |
| Between 31 and 90 days  | --     | 14.2%  | 19.8%  | 16.3%  | 25.1%  |
| More than 90 days       | --     | 28.3%  | 28.9%  | 28.1%  | 25.2%  |

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



|  | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|--|--------|--------|--------|--------|--------|
| Flight only  | --     | 4.5%   | 5.7%   | 2.1%   | 3.1%   |
| Flight and accommodation (room only)               | --     | 3.5%   | 11.6%  | 9.5%   | 5.4%   |
| Flight and accommodation (B&B)                     | --     | 1.7%   | 2.9%   | 5.0%   | 3.0%   |
| Flight and accommodation (half board)              | --     | 2.2%   | 4.3%   | 1.9%   | 2.3%   |
| Flight and accommodation (full board)              | --     | 15.3%  | 9.8%   | 9.0%   | 18.7%  |
| Flight and accommodation (all inclusive)           | --     | 72.8%  | 65.7%  | 72.6%  | 67.4%  |
| <b>% Tourists using low-cost airlines</b>          | --     | 42.1%  | 50.9%  | 52.6%  | 48.3%  |
| <b>Other expenses in their place of residence:</b> |        |        |        |        |        |
| - Car rental                                       | --     | 3.1%   | 10.8%  | 9.1%   | 9.2%   |
| - Sporting activities                              | --     | 3.5%   | 5.8%   | 5.9%   | 4.3%   |
| - Excursions                                       | --     | 8.9%   | 8.1%   | 11.0%  | 11.8%  |
| - Trip to other islands                            | --     | 2.3%   | 0.5%   | 3.1%   | 2.8%   |

### How do they book?



|                                      | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|--------------------------------------|--------|--------|--------|--------|--------|
| <b>Accommodation booking</b>         |        |        |        |        |        |
| <b>Tour Operator</b>                 | --     | 57.4%  | 51.0%  | 42.3%  | 44.2%  |
| - Tour Operator's website            | --     | 46.5%  | 63.9%  | 41.0%  | 49.8%  |
| <b>Accommodation</b>                 | --     | 4.4%   | 5.2%   | 8.3%   | 4.7%   |
| - Accommodation's website            | --     | 90.0%  | 77.3%  | 100.0% | 84.0%  |
| <b>Travel agency (High street)</b>   | --     | 32.6%  | 32.7%  | 34.5%  | 43.2%  |
| <b>Online Travel Agency (OTA)</b>    | --     | 5.0%   | 8.0%   | 13.8%  | 6.4%   |
| <b>No need to book accommodation</b> | --     | 0.6%   | 3.1%   | 1.1%   | 1.6%   |

|                                    | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|------------------------------------|--------|--------|--------|--------|--------|
| <b>Flight booking</b>              |        |        |        |        |        |
| <b>Tour Operator</b>               | --     | 65.9%  | 48.6%  | 37.5%  | 45.9%  |
| - Tour Operator's website          | --     | 40.9%  | 66.5%  | 52.6%  | 52.9%  |
| <b>Airline</b>                     | --     | 7.0%   | 11.9%  | 18.3%  | 9.3%   |
| - Airline's website                | --     | 57.4%  | 94.2%  | 72.5%  | 96.6%  |
| <b>Travel agency (High street)</b> | --     | 24.7%  | 34.7%  | 35.5%  | 41.2%  |
| <b>Online Travel Agency (OTA)</b>  | --     | 2.5%   | 4.8%   | 8.7%   | 3.6%   |

### Where do they stay?



|  | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|--|--------|--------|--------|--------|--------|
| <b>5* Hotel</b>                                    | --     | 2.6%   | 3.5%   | 2.5%   | 0.0%   |
| <b>4* Hotel</b>                                    | --     | 55.0%  | 53.1%  | 53.1%  | 59.7%  |
| <b>1-2-3* Hotel</b>                                | --     | 23.0%  | 16.7%  | 21.0%  | 13.3%  |
| <b>Apartment</b>                                   | --     | 17.1%  | 22.1%  | 21.8%  | 24.7%  |
| <b>Property (privately-owned, friends, family)</b> | --     | 2.0%   | 3.8%   | 1.0%   | 2.0%   |
| <b>Others</b>                                      | --     | 0.3%   | 0.8%   | 0.6%   | 0.3%   |

### Who are they?



|                     | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|---------------------|--------|--------|--------|--------|--------|
| <b>Gender</b>       |        |        |        |        |        |
| Percentage of men   | --     | 50.1%  | 49.6%  | 49.0%  | 49.7%  |
| Percentage of women | --     | 49.9%  | 50.4%  | 51.0%  | 50.3%  |

| Age                                   |    |      |      |      |      |
|---------------------------------------|----|------|------|------|------|
| Average age (tourists > 16 years old) | -- | 34.8 | 37.1 | 36.3 | 36.8 |
| Standard deviation                    | -- | 10.4 | 10.3 | 10.9 | 11.5 |

| Age range (> 16 years old) |    |       |       |       |       |
|----------------------------|----|-------|-------|-------|-------|
| 16-24 years old            | -- | 14.3% | 7.1%  | 11.8% | 16.0% |
| 25-30 years old            | -- | 28.0% | 25.4% | 25.7% | 20.1% |
| 31-45 years old            | -- | 42.0% | 52.0% | 40.7% | 44.3% |
| 46-60 years old            | -- | 13.7% | 12.2% | 17.6% | 15.5% |
| Over 60 years old          | -- | 2.0%  | 3.3%  | 4.2%  | 4.1%  |

| Occupation                       |    |       |       |       |       |
|----------------------------------|----|-------|-------|-------|-------|
| Business owner or self-employed  | -- | 32.8% | 33.6% | 39.7% | 32.3% |
| Upper/Middle management employee | -- | 39.8% | 43.6% | 33.1% | 36.6% |
| Auxiliary level employee         | -- | 14.2% | 14.6% | 11.7% | 15.8% |
| Students                         | -- | 10.7% | 3.4%  | 7.4%  | 12.0% |
| Retired                          | -- | 0.6%  | 4.2%  | 5.6%  | 1.4%  |
| Unemployed / unpaid dom. work    | -- | 1.9%  | 0.6%  | 2.5%  | 2.0%  |

| Annual household income level |    |       |       |       |       |
|-------------------------------|----|-------|-------|-------|-------|
| €12,000 - €24,000             | -- | 45.2% | 36.4% | 42.1% | 44.7% |
| €24,001 - €36,000             | -- | 29.2% | 26.9% | 17.9% | 32.0% |
| €36,001 - €48,000             | -- | 11.3% | 13.8% | 11.4% | 11.0% |
| €48,001 - €60,000             | -- | 4.9%  | 10.9% | 11.3% | 5.4%  |
| €60,001 - €72,000             | -- | 4.5%  | 5.0%  | 8.2%  | 2.4%  |
| €72,001 - €84,000             | -- | 1.6%  | 2.8%  | 0.0%  | 0.7%  |
| More than €84,000             | -- | 3.4%  | 4.2%  | 9.2%  | 3.8%  |

(\*) 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 (2017)

### Poland: Third Quarter

#### Which island do they choose?



| Tourists (> 16 years old) | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|---------------------------|--------|--------|--------|--------|--------|
| - Lanzarote               | --     | 6,698  | 6,022  | 3,218  | 11,812 |
| - Fuerteventura           | --     | 12,283 | 11,543 | 10,516 | 19,912 |
| - Gran Canaria            | --     | 7,284  | 7,448  | 8,634  | 14,276 |
| - Tenerife                | --     | 15,277 | 16,929 | 10,671 | 26,685 |
| - La Palma                | --     | 0      | 0      | 800    | 2,889  |

| Share (%)       | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|-----------------|--------|--------|--------|--------|--------|
| - Lanzarote     | --     | 16.1%  | 14.4%  | 9.5%   | 15.6%  |
| - Fuerteventura | --     | 29.6%  | 27.5%  | 31.1%  | 26.3%  |
| - Gran Canaria  | --     | 17.5%  | 17.8%  | 25.5%  | 18.9%  |
| - Tenerife      | --     | 36.8%  | 40.4%  | 31.5%  | 35.3%  |
| - La Palma      | --     | 0.0%   | 0.0%   | 2.4%   | 3.8%   |

#### Who do they come with?



|  | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|--|--------|--------|--------|--------|--------|
| Unaccompanied                            | --     | 2.5%   | 6.4%   | 4.5%   | 4.6%   |
| Only with partner                        | --     | 46.1%  | 44.2%  | 45.2%  | 45.1%  |
| Only with children (under the age of 13) | --     | 2.5%   | 2.0%   | 2.1%   | 0.8%   |
| Partner + children (under the age of 13) | --     | 16.4%  | 20.8%  | 16.0%  | 17.2%  |
| Other relatives                          | --     | 5.6%   | 8.1%   | 7.2%   | 6.2%   |
| Friends                                  | --     | 7.0%   | 1.9%   | 2.1%   | 4.1%   |
| Work colleagues                          | --     | 0.0%   | 0.0%   | 0.0%   | 0.0%   |
| Other combinations <sup>(1)</sup>        | --     | 19.8%  | 16.6%  | 23.0%  | 21.9%  |

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

#### How do they rate the destination?



| Impression of their stay       | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|--------------------------------|--------|--------|--------|--------|--------|
| Good or very good (% tourists) | --     | 95.3%  | 96.4%  | 94.2%  | 94.0%  |
| Average rating (scale 1-10)    | --     | 9.16   | 9.27   | 8.96   | 9.24   |

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

| Repeat tourists of the Canary Islands | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|---------------------------------------|--------|--------|--------|--------|--------|
| Repeat tourists                       | --     | 32.5%  | 30.0%  | 27.1%  | 32.9%  |
| In love (at least 10 previous visits) | --     | 0.5%   | 0.6%   | 0.9%   | 1.0%   |

#### Where does the flight come from?



| Ten main origin markets | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|-------------------------|--------|--------|--------|--------|--------|
| Poland                  | --     | 89.4%  | 96.4%  | 84.9%  | 97.1%  |
| Spanish Mainland        | --     | 0.9%   | 1.0%   | 5.3%   | 1.5%   |
| United Kingdom          | --     | 1.0%   | 1.2%   | 3.2%   | 1.4%   |
| Germany                 | --     | 5.8%   | 0.0%   | 5.3%   | 0.0%   |
| Netherlands             | --     | 0.6%   | 0.0%   | 0.0%   | 0.0%   |
| Ireland                 | --     | 1.3%   | 0.0%   | 1.2%   | 0.0%   |
| Norway                  | --     | 0.5%   | 0.0%   | 0.0%   | 0.0%   |
| Switzerland             | --     | 0.4%   | 0.0%   | 0.0%   | 0.0%   |
| Austria                 | --     | 0.0%   | 0.0%   | 0.0%   | 0.0%   |
| France                  | --     | 0.0%   | 0.0%   | 0.0%   | 0.0%   |

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



| Aspects influencing the choice    | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|-----------------------------------|--------|--------|--------|--------|--------|
| Climate/sun                       | --     | 85.5%  | 83.0%  | 76.7%  | 87.9%  |
| Scenery                           | --     | 36.7%  | 43.8%  | 36.9%  | 45.2%  |
| Beaches                           | --     | 43.7%  | 39.0%  | 43.8%  | 41.6%  |
| Security                          | --     | 5.7%   | 23.2%  | 24.0%  | 28.5%  |
| Visiting new places               | --     | 30.4%  | 30.3%  | 25.3%  | 28.5%  |
| Tranquillity/rest/relaxation      | --     | 33.8%  | 30.5%  | 26.9%  | 28.2%  |
| Active tourism                    | --     | 6.5%   | 6.3%   | 9.8%   | 6.2%   |
| Shopping                          | --     | 2.8%   | 3.4%   | 5.4%   | 4.6%   |
| Price                             | --     | 7.2%   | 3.5%   | 5.4%   | 4.3%   |
| Theme parks                       | --     | 7.3%   | 8.4%   | 3.3%   | 4.1%   |
| Suitable destination for children | --     | 7.2%   | 4.6%   | 3.8%   | 4.0%   |
| Quality of the environment        | --     | 5.5%   | 3.4%   | 1.8%   | 3.3%   |
| Nautical activities               | --     | 3.8%   | 2.0%   | 4.0%   | 2.8%   |
| Nightlife/fun                     | --     | 5.6%   | 2.2%   | 2.4%   | 2.2%   |
| Culture                           | --     | 2.4%   | 2.7%   | 0.0%   | 1.5%   |
| Ease of travel                    | --     | 0.2%   | 0.5%   | 0.9%   | 0.7%   |

\* Multi-choice question

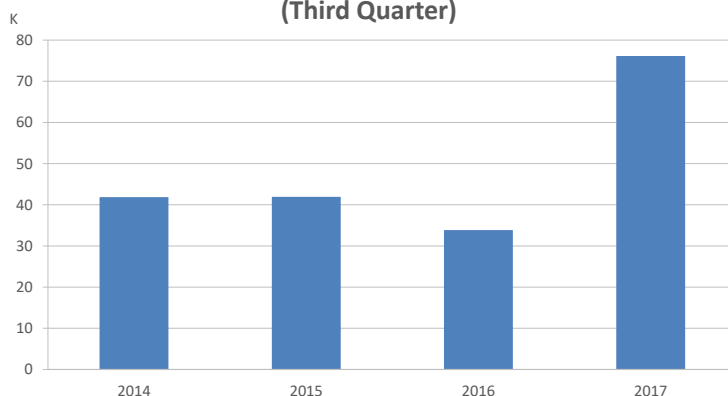
#### What did motivate them to come?



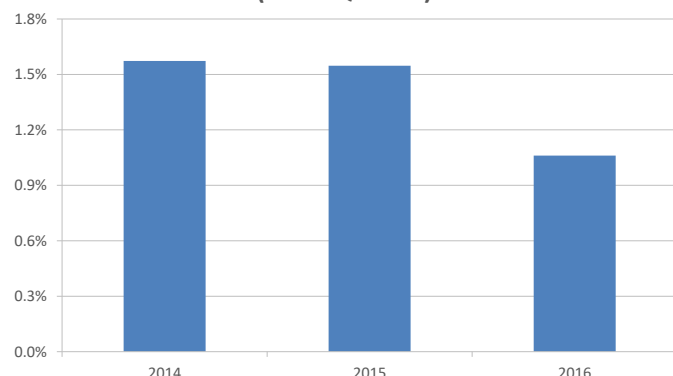
| Aspects motivating the choice            | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|--|--------|--------|--------|--------|--------|
| Previous visits to the Canary Islands    | --     | 31.4%  | 24.9%  | 22.6%  | 28.4%  |
| Recommendation by friends or relatives   | --     | 36.4%  | 40.7%  | 38.4%  | 37.8%  |
| The Canary Islands television channel    | --     | 0.7%   | 0.0%   | 0.7%   | 0.0%   |
| Other television or radio channels       | --     | 4.2%   | 7.4%   | 5.6%   | 5.1%   |
| Information in the press/magazines/books | --     | 18.1%  | 12.9%  | 11.4%  | 13.5%  |
| Attendance at a tourism fair             | --     | 0.0%   | 0.0%   | 1.2%   | 2.8%   |
| Tour Operator's brochure or catalogue    | --     | 16.1%  | 13.7%  | 9.5%   | 10.8%  |
| Recommendation by Travel Agency          | --     | 20.9%  | 16.6%  | 22.6%  | 22.6%  |
| Information obtained via the Internet    | --     | 42.3%  | 48.6%  | 43.5%  | 49.0%  |
| Senior Tourism programme                 | --     | 0.0%   | 0.0%   | 0.0%   | 0.0%   |
| Others                                   | --     | 3.1%   | 3.5%   | 4.6%   | 1.7%   |

\* 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). (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.