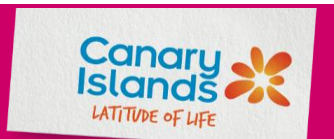


# Tourist profile by islands (2016)

## Polish market



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



### How do they book?



	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma	800
Tourist arrivals (> 16 years old)	14,218	31,782	26,077	46,214		
Average daily expenditure (€)	141.18	112.00	131.75	119.92	--	
. in their place of residence	100.76	84.63	91.99	91.26	--	
. in the Canary Islands	40.43	27.37	39.76	28.66	--	
Average length of stay	7.99	7.94	8.76	8.18	--	
Turnover per tourist (€)	1,135	868	1,068	939	--	
Total turnover (> 16 years old) (€m)	16.1	27.6	27.8	43	--	
Polish turnover: share by islands	13.9%	23.8%	24.0%	37.4%	--	
Polish tourist arrivals: share by islands	11.9%	26.7%	21.9%	38.8%	0.7%	

	LZ	FUE	GC	TFE	LP
<b>Accommodation booking</b>					
<b>Tour Operator</b>	51.2%	42.7%	44.4%	43.6%	--
- Tour Operator's website	51.3%	44.9%	49.1%	57.6%	--
<b>Accommodation</b>	17.4%	14.1%	9.1%	7.9%	--
- Accommodation's website	78.7%	100.0%	60.4%	100.0%	--
<b>Travel agency (High street)</b>	21.8%	27.8%	30.6%	33.0%	--
<b>Online Travel Agency (OTA)</b>	9.6%	14.7%	14.2%	12.6%	--
<b>No need to book accommodation</b>	0.0%	0.6%	1.7%	2.9%	--

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

	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma	800
<b>Accommodation (**):</b>	63.60	27.28	46.89	16.85	--	
- Accommodation	58.24	26.82	45.32	16.60	--	
- Additional accommodation expenses	5.36	0.46	1.57	0.25	--	
<b>Transport:</b>	26.97	21.87	29.88	13.30	--	
- Public transport	3.20	3.98	12.40	5.14	--	
- Taxi	9.27	3.03	6.15	1.89	--	
- Car rental	14.50	14.86	11.33	6.26	--	
<b>Food and drink:</b>	90.99	53.67	73.43	58.38	--	
- Food purchases at supermarkets	52.93	23.49	45.14	34.20	--	
- Restaurants	38.06	30.18	28.29	24.18	--	
<b>Souvenirs:</b>	58.54	50.87	68.98	79.54	--	
<b>Leisure:</b>	68.18	48.06	76.42	48.82	--	
- Organized excursions	50.15	12.95	51.88	30.55	--	
- Leisure, amusement	2.43	7.59	7.22	8.44	--	
- Trip to other islands	1.57	5.38	2.36	2.68	--	
- Sporting activities	9.27	16.56	4.21	5.64	--	
- Cultural activities	0.77	4.48	1.40	0.27	--	
- Discos and disco-pubs	3.99	1.09	9.33	1.24	--	
<b>Others:</b>	24.50	9.02	20.95	3.98	--	
- Wellness	24.27	1.20	11.45	0.20	--	
- Medical expenses	0.20	0.10	0.30	1.45	--	
- Other expenses	0.04	7.71	9.19	2.33	--	

	LZ	FUE	GC	TFE	LP
<b>Flight booking</b>					
<b>Tour Operator</b>	64.2%	44.7%	45.7%	42.4%	--
- Tour Operator's website	63.9%	30.5%	60.5%	57.5%	--
<b>Airline</b>	10.1%	24.2%	13.8%	21.8%	--
- Airline's website	100.0%	91.7%	92.4%	83.0%	--
<b>Travel agency (High street)</b>	21.5%	24.7%	34.7%	31.2%	--
<b>Online Travel Agency (OTA)</b>	4.3%	6.4%	5.8%	4.5%	--

### Where do they stay?



	LZ	FUE	GC	TFE	LP
5* Hotel	11.2%	2.0%	2.1%	4.1%	--
4* Hotel	56.5%	47.2%	47.9%	48.1%	--
1-2-3* Hotel	4.1%	28.8%	29.5%	15.2%	--
Apartment	27.3%	21.3%	16.5%	27.9%	--
Property (privately-owned, friends, family)	0.0%	0.3%	0.5%	2.4%	--
Others	0.9%	0.4%	3.4%	2.3%	--

### Who are they?



	LZ	FUE	GC	TFE	LP
<b>Gender</b>					
Percentage of men	49.3%	57.4%	52.7%	44.7%	--
Percentage of women	50.7%	42.6%	47.3%	55.3%	--

	LZ	FUE	GC	TFE	LP
<b>Age</b>					
Average age (tourists > 16 years old)	40.5	36.6	38.2	37.2	--
Standard deviation	16.0	11.0	13.5	11.5	--

	LZ	FUE	GC	TFE	LP
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	3.4%	9.1%	7.9%	12.2%	--
25-30 years old	29.9%	25.3%	30.4%	19.0%	--
31-45 years old	36.0%	48.0%	38.2%	48.6%	--
46-60 years old	13.0%	13.4%	13.2%	15.7%	--
Over 60 years old	17.7%	4.2%	10.3%	4.6%	--

	LZ	FUE	GC	TFE	LP
<b>Occupation</b>					
Business owner or self-employed	45.3%	42.8%	43.9%	35.8%	--
Upper/Middle management employee	30.8%	22.8%	37.5%	34.2%	--
Auxiliary level employee	6.9%	17.4%	8.8%	13.7%	--
Students	3.7%	9.4%	3.7%	5.6%	--
Retired	7.0%	5.4%	2.2%	4.6%	--
Unemployed / unpaid dom. work	6.3%	2.3%	3.9%	6.1%	--

	LZ	FUE	GC	TFE	LP
<b>Annual household income level</b>					
€12,000 - €24,000	36.0%	34.5%	37.4%	43.6%	--
€24,001 - €36,000	26.4%	23.1%	27.4%	19.5%	--
€36,001 - €48,000	7.4%	12.7%	13.8%	13.9%	--
€48,001 - €60,000	23.6%	6.4%	8.8%	8.0%	--
€60,001 - €72,000	6.6%	16.2%	3.1%	4.2%	--
€72,001 - €84,000	0.0%	0.0%	0.0%	0.0%	--
More than €84,000	0.0%	7.1%	9.5%	10.9%	--

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



	LZ	FUE	GC	TFE	LP
The same day they leave	0.0%	0.0%	2.2%	2.2%	--
Between 2 and 7 days	21.3%	23.6%	21.3%	15.7%	--
Between 8 and 15 days	23.1%	11.6%	16.4%	12.0%	--
Between 16 and 30 days	22.0%	13.9%	20.0%	15.1%	--
Between 31 and 90 days	26.3%	20.9%	19.5%	28.0%	--
More than 90 days	7.4%	30.0%	20.6%	26.9%	--

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



	LZ	FUE	GC	TFE	LP
Flight only	0.0%	2.8%	4.1%	6.6%	--
Flight & accommodation (room only)	12.0%	15.7%	8.2%	8.9%	--
Flight & accommodation (B&B)	10.0%	3.7%	2.8%	4.5%	--
Flight & accommodation (half board)	6.1%	2.9%	5.5%	1.6%	--
Flight & accommodation (full board)	7.9%	10.3%	16.9%	13.2%	--
Flight & accommodation (all inclusive)	64.0%	64.5%	62.5%	65.3%	--
<b>% Tourists using low-cost airlines</b>	41.6%	60.0%	46.9%	54.8%	--
<b>Other expenses in their place of residence:</b>					
- Car rental	9.0%	11.6%	10.0%	19.4%	--
- Sporting activities	0.0%	2.9%	1.7%	9.8%	--
- Excursions	5.7%	7.2%	12.7%	13.6%	--
- Trip to other islands	4.8%	1.5%	1.5%	2.4%	--

(\*) 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 by islands (2016)

## Polish market



### Which island do they choose?

Tourist (> 16 years old)	LZ	FUE	GC	TFE	LP
- 2012	14,910	51,637	22,703	49,242	1,723
- 2013	--	--	--	--	--
- 2014	22,422	38,863	18,833	47,012	106
- 2015	25,311	44,822	18,905	49,408	0
- 2016	14,218	31,782	26,077	46,214	800

Share (%)	LZ	FUE	GC	TFE	LP
- 2012	10.6%	36.8%	16.2%	35.1%	1.2%
- 2013	--	--	--	--	--
- 2014	17.6%	30.5%	14.8%	36.9%	0.1%
- 2015	18.3%	32.4%	13.7%	35.7%	0.0%
- 2016	11.9%	26.7%	21.9%	38.8%	0.7%

### Who do they come with?

	LZ	FUE	GC	TFE	LP
Unaccompanied	0.0%	1.0%	7.7%	3.8%	--
Only with partner	51.3%	33.1%	58.2%	40.2%	--
Only with children (under the age of 13)	6.7%	0.0%	0.9%	0.0%	--
Partner + children (under the age of 13)	4.1%	23.6%	10.8%	12.8%	--
Other relatives	8.6%	6.3%	9.3%	8.5%	--
Friends	12.1%	6.0%	4.1%	3.8%	--
Work colleagues	0.0%	0.5%	0.0%	1.1%	--
Other combinations <sup>(1)</sup>	17.2%	29.4%	9.0%	29.7%	--

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

### How do they rate the destination?

Impression of their stay	LZ	FUE	GC	TFE	LP
Good or very good (% tourists)	100.0%	89.3%	92.9%	97.6%	--
Average rating (scale 1-10)	9.27	8.87	9.12	9.06	--

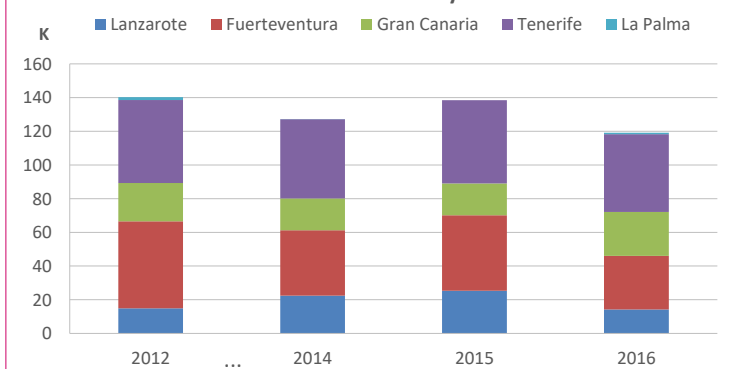
### How many are loyal to the destination?

Repeat tourists of each island	LZ	FUE	GC	TFE	LP
Repeat tourists	31.2%	24.4%	19.0%	21.8%	--
In love (at least 10 previous visits)	0.0%	0.0%	0.0%	0.6%	--

### Where does the flight come from?

Ten main origin markets	LZ	FUE	GC	TFE	LP
Poland	77.6%	78.3%	82.2%	93.1%	--
United Kingdom	4.4%	7.9%	7.1%	2.8%	--
Germany	13.5%	8.3%	4.2%	0.4%	--
Spanish Mainland	4.5%	4.3%	1.8%	2.0%	--
Belgium	0.0%	0.0%	0.5%	0.8%	--
Denmark	0.0%	0.0%	1.9%	0.0%	--
Ireland	0.0%	0.0%	0.0%	0.9%	--
France	0.0%	1.2%	0.0%	0.0%	--
Norway	0.0%	0.0%	1.2%	0.0%	--
Switzerland	0.0%	0.0%	0.0%	0.0%	--

### Tourist arrivals trend by islands



### Why do they choose the Canary Islands?

Aspects influencing the choice	LZ	FUE	GC	TFE	LP
Climate/sun	90.9%	79.4%	79.3%	90.6%	--
Scenery	29.3%	29.0%	36.0%	44.5%	--
Beaches	21.6%	44.2%	46.4%	16.2%	--
Tranquillity/rest/relaxation	28.3%	32.7%	16.1%	31.7%	--
Security	41.2%	24.8%	24.0%	20.1%	--
Visiting new places	29.0%	20.4%	20.2%	26.7%	--
Price	10.1%	17.1%	9.6%	8.2%	--
Active tourism	10.2%	8.9%	0.6%	16.8%	--
Nautical activities	2.8%	14.4%	2.2%	2.7%	--
Suitable destination for children	3.9%	7.8%	3.9%	4.5%	--
Quality of the environment	1.7%	2.9%	6.6%	5.4%	--
Ease of travel	4.5%	2.9%	1.7%	4.1%	--
Security against natural catastrophes	0.0%	5.4%	3.2%	2.4%	--
Theme parks	2.2%	0.8%	0.0%	4.4%	--
Shopping	2.2%	1.7%	4.5%	0.9%	--
Nightlife/fun	0.0%	0.0%	5.4%	2.0%	--

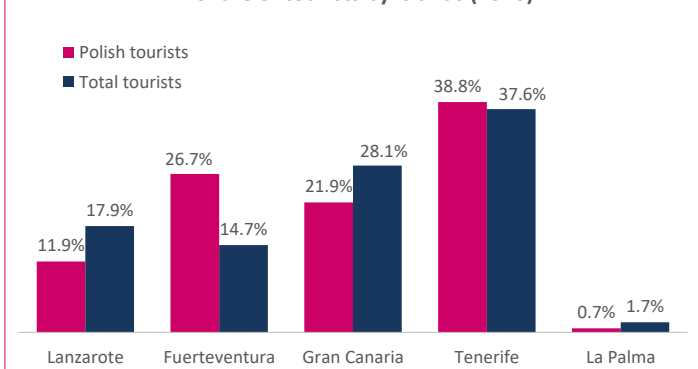
\* Multi-choice question

### What did motivate them to come?

Aspects motivating the choice	LZ	FUE	GC	TFE	LP
Previous visits to the Canary Islands	47.5%	39.4%	39.7%	33.8%	--
Recommendation by friends or relatives	32.0%	34.9%	33.8%	36.1%	--
The Canary Islands television channel	0.0%	0.0%	1.6%	0.0%	--
Other television or radio channels	0.0%	8.4%	4.1%	1.7%	--
Information in the press/magazines/books	3.7%	7.8%	8.6%	11.8%	--
Attendance at a tourism fair	4.5%	3.2%	1.4%	0.0%	--
Tour Operator's brochure or catalogue	6.7%	10.1%	5.0%	11.0%	--
Recommendation by Travel Agency	19.5%	20.9%	21.2%	20.6%	--
Information obtained via the Internet	45.4%	40.8%	41.0%	47.9%	--
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	--
Others	3.6%	3.1%	5.8%	3.7%	--

\* Multi-choice question

### Share of tourists by islands (2016)



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.