

Tourist profile trend (2017) POLAND: Fourth Quarter

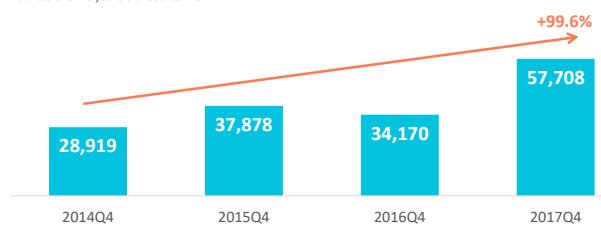


How many are they and how much do they spend?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	--	n.d.	n.d.	n.d.	n.d.
Tourist arrivals (<u>> 16 years old</u>)	--	28,919	37,878	34,170	57,708
Average daily expenditure (€)	--	113.76	104.40	128.51	138.49
. in their place of residence	--	80.20	77.53	91.85	103.70
. in the Canary Islands	--	33.56	26.87	36.66	34.78
Average length of stay	--	8.59	7.79	7.70	7.51
Turnover per tourist (€)	--	884	776	951	956
Total turnover (<u>> 16 years old</u>) (€m)	--	25.6	29.4	32.5	55.2
Share of annual tourist	--	22.6%	27.3%	28.7%	21.7%
Share of annual turnover	--	21.6%	22.9%	28.0%	21.0%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	--	7.3%	12.3%	12.3%	9.5%
- Additional accommodation expenses	--	2.2%	0.8%	3.4%	3.4%
Transport:					
- Public transport	--	20.0%	20.2%	21.3%	22.1%
- Taxi	--	13.8%	14.4%	17.0%	6.9%
- Car rental	--	26.9%	23.7%	23.6%	25.1%
Food and drink:					
- Food purchases at supermarkets	--	52.0%	42.8%	49.2%	50.8%
- Restaurants	--	36.4%	41.1%	40.7%	36.4%
Souvenirs:					
--	79.0%	59.4%	67.1%	68.6%	
Leisure:					
- Organized excursions	--	37.8%	31.0%	30.7%	27.8%
- Leisure, amusement	--	18.5%	11.7%	15.4%	15.6%
- Trip to other islands	--	6.8%	6.9%	10.9%	4.8%
- Sporting activities	--	7.2%	9.8%	12.3%	10.6%
- Cultural activities	--	3.0%	3.8%	5.8%	6.2%
- Discos and disco-pubs	--	6.7%	5.9%	3.8%	3.6%
Others:					
- Wellness	--	0.6%	1.5%	3.3%	2.1%
- Medical expenses	--	0.0%	2.5%	3.6%	1.5%
- Other expenses	--	9.6%	12.4%	4.3%	6.8%

TOURIST ARRIVALS

Tourists over 16 years old. Source: EGT



What do they book at their place of residence?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	--	2.2%	4.1%	2.2%	1.7%
Flight and accommodation (room only)	--	4.6%	11.2%	12.4%	10.1%
Flight and accommodation (B&B)	--	4.8%	3.8%	5.3%	3.0%
Flight and accommodation (half board)	--	3.7%	5.3%	6.6%	2.4%
Flight and accommodation (full board)	--	14.5%	8.0%	18.1%	16.1%
Flight and accommodation (all inclusive)	--	70.2%	67.5%	55.4%	66.7%
<u>% Tourists using low-cost airlines</u>	--	35.0%	58.6%	46.0%	44.8%
<u>Other expenses in their place of residence:</u>					
- Car rental	--	5.2%	9.9%	13.2%	13.1%
- Sporting activities	--	4.6%	6.9%	3.1%	1.8%
- Excursions	--	8.7%	4.7%	9.7%	7.0%
- Trip to other islands	--	5.4%	1.1%	3.4%	1.7%

How do they book?

Accommodation booking	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tour Operator	--	57.6%	43.0%	39.5%	52.1%
- Tour Operator's website	--	14.3%	61.3%	56.2%	51.0%
Accommodation	--	5.6%	13.3%	11.9%	8.3%
- Accommodation's website	--	84.9%	86.8%	100.0%	80.5%
Travel agency (High street)	--	30.6%	30.9%	33.6%	28.1%
Online Travel Agency (OTA)	--	6.1%	11.0%	13.7%	11.3%
No need to book accommodation	--	0.0%	1.7%	1.3%	0.3%

Flight booking

Flight booking	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tour Operator	--	56.0%	43.6%	46.3%	56.5%
- Tour Operator's website	--	29.0%	46.1%	57.1%	53.0%
Airline	--	9.9%	24.7%	16.8%	14.8%
- Airline's website	--	77.7%	88.6%	100.0%	90.1%
Travel agency (High street)	--	32.7%	29.8%	33.0%	24.7%
Online Travel Agency (OTA)	--	1.4%	1.9%	4.0%	4.1%

How far in advance do they book their trip?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	--	2.9%	1.8%	0.7%	1.1%
Between 2 and 7 days	--	37.7%	25.2%	20.7%	14.3%
Between 8 and 15 days	--	16.1%	16.3%	18.0%	18.1%
Between 16 and 30 days	--	14.5%	14.4%	14.2%	20.2%
Between 31 and 90 days	--	20.8%	32.4%	29.6%	28.2%
More than 90 days	--	8.0%	9.9%	16.7%	18.2%

Who are they?

Gender	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Men	--	46.1%	48.2%	52.1%	61.3%
Women	--	53.9%	51.8%	47.9%	38.7%
<u>Age</u>					
Average age (tourists > 16 years old)	--	35.8	34.1	37.8	40.7
Standard deviation	--	9.9	11.6	14.5	13.8
<u>Age range (> 16 years old)</u>					
16-24 years old	--	7.4%	9.3%	13.3%	7.2%
25-30 years old	--	30.9%	44.5%	25.3%	23.7%
31-45 years old	--	47.2%	33.4%	36.8%	36.9%
46-60 years old	--	12.8%	7.9%	14.4%	17.2%
Over 60 years old	--	1.7%	5.0%	10.1%	15.0%
<u>Occupation</u>					
Business owner or self-employed	--	40.6%	42.6%	36.5%	42.3%
Upper/Middle management employee	--	33.1%	32.9%	31.6%	31.1%
Auxiliary level employee	--	14.0%	12.4%	11.2%	11.7%
Students	--	5.7%	6.2%	8.4%	3.3%
Retired	--	2.5%	2.1%	7.4%	8.7%
Unemployed / unpaid dom. work	--	4.2%	3.8%	4.8%	2.9%
<u>Annual household income level</u>					
€12,000 - €24,000	--	48.5%	45.1%	42.9%	47.9%
€24,001 - €36,000	--	19.7%	23.6%	21.5%	23.9%
€36,001 - €48,000	--	11.8%	11.6%	15.0%	9.2%
€48,001 - €60,000	--	12.3%	6.4%	6.7%	6.3%
€60,001 - €72,000	--	1.1%	5.7%	6.4%	3.5%
€72,001 - €84,000	--	0.0%	3.6%	0.0%	2.5%
More than €84,000	--	6.5%	4.0%	7.5%	6.6%

Tourist profile trend (2017)

POLAND: Fourth Quarter



Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	--	5,937	8,069	6,576	10,013
- Fuerteventura	--	7,807	10,554	8,245	12,881
- Gran Canaria	--	4,166	4,859	7,666	14,156
- Tenerife	--	10,764	14,159	11,683	20,555
- La Palma	--	106	0	0	0

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	--	20.6%	21.4%	19.2%	17.4%
- Fuerteventura	--	27.1%	28.0%	24.1%	22.4%
- Gran Canaria	--	14.5%	12.9%	22.4%	24.6%
- Tenerife	--	37.4%	37.6%	34.2%	35.7%
- La Palma	--	0.4%	0.0%	0.0%	0.0%

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	--	2.5%	1.7%	7.7%	3.1%
4* Hotel	--	57.2%	51.8%	38.1%	47.5%
1-2-3* Hotel	--	25.3%	16.4%	24.3%	18.4%
Apartment	--	12.2%	25.0%	28.1%	26.9%
Property (privately-owned, friends, family)	--	1.2%	2.1%	0.0%	0.3%
Others	--	1.6%	2.8%	1.8%	3.8%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	--	92.6%	91.6%	88.5%	95.8%
Scenery	--	41.4%	45.5%	33.9%	35.7%
Beaches	--	40.1%	32.1%	33.4%	32.3%
Tranquillity/rest/relaxation	--	26.8%	35.3%	24.4%	30.5%
Security	--	10.4%	15.3%	20.4%	23.5%
Visiting new places	--	32.1%	21.1%	23.9%	19.2%
Price	--	13.9%	9.0%	11.7%	8.1%
Ease of travel	--	4.3%	3.4%	6.9%	6.9%
Active tourism	--	7.1%	8.9%	10.3%	6.7%
Suitable destination for children	--	4.6%	4.0%	7.7%	4.5%
Quality of the environment	--	1.2%	8.2%	3.1%	4.3%
Shopping	--	1.6%	2.8%	0.9%	4.1%
Nautical activities	--	4.3%	3.6%	4.0%	3.6%
Culture	--	3.4%	2.3%	4.7%	1.9%
Security against natural catastrophes	--	0.0%	0.0%	4.9%	1.2%
Nightlife/fun	--	0.8%	1.3%	0.9%	1.1%

* Multi-choice question

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	--	8.0%	6.1%	4.9%	6.1%
Only with partner	--	55.3%	53.1%	45.0%	51.0%
Only with children (under the age of 13)	--	1.2%	1.7%	1.4%	0.0%
Partner + children (under the age of 13)	--	13.9%	12.1%	7.8%	9.7%
Other relatives	--	5.0%	4.3%	12.1%	7.1%
Friends	--	3.1%	7.8%	8.7%	8.3%
Work colleagues	--	1.6%	0.9%	0.5%	0.9%
Other combinations ⁽¹⁾	--	11.9%	14.0%	19.6%	16.8%

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

How do they rate the Canary Islands?

Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	--	98.8%	96.9%	95.2%	99.1%
Average rating (scale 1-10)	--	9.42	9.33	9.10	9.55

How many are loyal to the Canary Islands?

Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	--	47.3%	45.6%	62.2%	51.6%
At least 10 previous visits	--	2.7%	1.5%	4.7%	3.8%

Where does the flight come from?

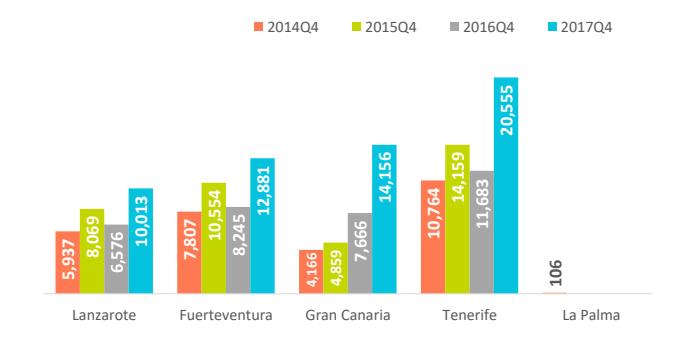
Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Poland	--	91.4%	89.6%	84.0%	95.1%
Germany	--	3.6%	3.1%	4.8%	1.5%
Spanish Mainland	--	3.6%	3.2%	3.4%	1.1%
United Kingdom	--	1.4%	2.4%	4.3%	1.1%
Norway	--	0.0%	0.8%	0.0%	0.7%
Ireland	--	0.0%	0.0%	0.0%	0.6%
Austria	--	0.0%	0.9%	0.0%	0.0%
Belgium	--	0.0%	0.0%	1.4%	0.0%
France	--	0.0%	0.0%	1.1%	0.0%
Others	--	0.0%	0.0%	0.9%	0.0%

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	--	36.0%	37.9%	51.9%	46.7%
Recommendation by friends/relatives	--	39.7%	45.4%	33.0%	37.8%
The Canary Islands television channel	--	2.7%	2.0%	0.0%	0.8%
Other television or radio channels	--	1.8%	2.6%	1.7%	3.7%
Information in press/magazines/books	--	7.9%	10.4%	9.8%	11.7%
Attendance at a tourism fair	--	0.0%	0.0%	1.7%	0.0%
Tour Operator's brochure or catalogue	--	11.5%	4.6%	5.8%	4.8%
Recommendation by Travel Agency	--	29.0%	18.8%	17.6%	11.6%
Information obtained via the Internet	--	31.5%	37.3%	41.9%	44.8%
Senior Tourism programme	--	0.0%	0.9%	0.0%	0.0%
Others	--	5.5%	5.9%	1.2%	4.0%

* Multi-choice question

Tourist arrivals by islands



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.