

Tourist profile by quarter of trip (2023)

POLAND

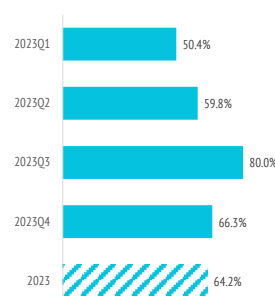


How many are they and how much do they spend?

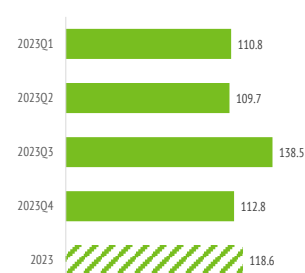


	2023Q1	2023Q2	2023Q3	2023Q4	2023
TOURISTS					
Tourist arrivals ≥ 16 years old (EGT) (*)	70	61	70	54	254
- book holiday package (*)	35	37	56	36	163
- do not book holiday package (*)	35	25	14	18	91
- % tourists who book holiday package	50.4%	59.8%	80.0%	66.3%	64.2%
(*) Thousand of tourists					
Expenditure per tourist (€)					
- book holiday package	263	221	301	223	258
- holiday package	221	184	251	190	216
- others	42	36	51	33	42
- do not book holiday package	164	313	293	156	214
- flight	44	86	100	42	62
- accommodation	47	99	74	52	63
- others	72	128	119	62	89
Average lenght of stay	12.17	8.26	8.77	7.83	9.38
Average daily expenditure (€)	159.3	156.4	205.2	163.9	172.2
Average daily expenditure (without flight)	110.8	109.7	138.5	112.8	118.6
Average cost of the flight (€)	62.6	74.8	96.3	62.1	74.2
Total turnover (≥ 16 years old) (€m)	97	76	121	66	359

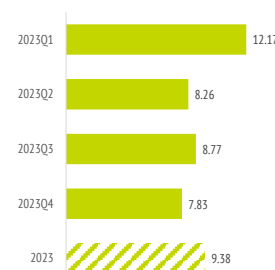
% tourists who book holiday package



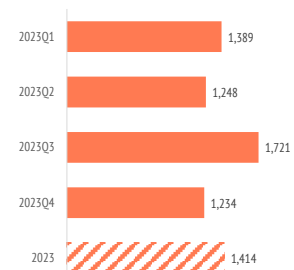
Average daily expenditure (€) (without flight)



Average lenght of stay



Expenditure per tourist (€)



% Tourists whose spending has been greater than €0 in each item

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Accommodation:					
- Accommodation	82.0%	87.2%	90.1%	92.2%	87.6%
- Additional accommodation expenses	8.5%	6.1%	4.8%	4.1%	6.0%
Transport:					
- National/International Transport	93.5%	95.7%	96.8%	98.1%	95.9%
- Flights between islands	13.6%	8.8%	8.5%	6.3%	9.5%
- Taxi	46.6%	55.4%	69.5%	55.7%	56.9%
- Car rental	39.4%	43.9%	34.5%	41.3%	39.5%
- Public transport	19.3%	9.6%	8.7%	11.1%	12.3%
Food and drink:					
- Food purchases at supermarkets	62.2%	53.7%	49.0%	48.4%	53.6%
- Restaurants	54.8%	49.2%	47.5%	44.0%	49.2%
Leisure:					
- Organized excursions	28.7%	33.6%	51.3%	38.2%	38.1%
- Sport activities	3.8%	8.3%	3.3%	4.6%	4.9%
- Cultural activities	4.7%	6.4%	1.8%	1.9%	3.7%
- Museums	5.2%	2.5%	4.3%	4.7%	4.2%
- Theme Parks	10.8%	16.0%	19.6%	12.1%	14.8%
- Discos and pubs	2.6%	4.9%	3.9%	5.2%	4.0%
- Wellness	1.7%	0.7%	1.9%	2.4%	1.6%
Purchases of goods:					
- Souvenirs	45.1%	56.0%	56.9%	37.9%	49.4%
- Real state	1.0%	0.0%	0.0%	0.0%	0.3%
- Other expenses	0.0%	1.3%	1.1%	2.2%	1.1%
Other:					
- Medical or pharmaceutical expenses	5.3%	2.8%	3.3%	5.4%	4.2%
- Other expenses	7.6%	7.4%	7.5%	4.9%	7.0%

Average expenditure of tourists whose spending has been greater than €0 in each item

Expenditure per tourist and trip (€)	2023Q1	2023Q2	2023Q3	2023Q4	2023
Accommodation:					
- Accommodation	840	731	864	688	791
- Additional accommodation expenses	134	174	90	119	132
Transport:					
- National/International Transport	429	389	572	389	450
- Flights between islands	72	123	129	48	94
- Taxi	103	105	125	99	110
- Car rental	130	113	135	99	120
- Public transport	34	24	16	55	33
Food and drink:					
- Food purchases at supermarkets	136	81	135	85	113
- Restaurants	151	154	148	128	146
Leisure:					
- Organized excursions	142	112	140	128	132
- Sport activities	83	193	107	92	134
- Cultural activities	43	46	44	47	45
- Museums	35	67	48	40	45
- Theme Parks	86	73	92	63	81
- Discos and pubs	76	62	53	56	60
- Wellness	72	41	103	85	82
Purchases of goods:					
- Souvenirs	112	101	108	113	108
- Real state	13	0	0	0	13
- Other expenses	0	31	55	89	62
Other:					
- Medical or pharmaceutical expenses	23	78	47	72	50
- Other expenses	60	103	264	62	132

Source: Encuesta sobre el Gasto Turístico (ISTAC).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

Tourist profile by quarter of trip (2023)

POLAND



What is the main purpose of their trip?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Holiday, leisure	87.4%	93.0%	93.7%	93.8%	91.8%
Visiting family or friends	9.0%	4.6%	3.7%	2.4%	5.1%
Business and work	1.6%	1.5%	1.0%	2.5%	1.6%
Education and training	0.2%	0.0%	0.0%	0.0%	0.1%
Sports training	0.5%	0.9%	0.0%	0.0%	0.3%
Health or medical care	0.0%	0.0%	0.0%	0.0%	0.0%
Fairs and congresses	0.0%	0.0%	0.9%	0.0%	0.2%
Others	1.3%	0.0%	0.7%	1.3%	0.8%

What is the main motivation for their holidays?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Rest	43.8%	50.2%	56.6%	47.5%	49.6%
Enjoy family time	11.6%	7.1%	7.5%	3.8%	7.7%
Have fun	4.1%	2.1%	1.2%	2.9%	2.6%
Explore the destination	39.6%	37.6%	34.3%	40.7%	37.9%
Practice their hobbies	0.9%	2.0%	0.2%	3.0%	1.4%
Other reasons	0.0%	1.1%	0.3%	2.1%	0.8%

Where did they spend their main holiday last year? *

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Didn't have holidays	13.3%	23.9%	15.8%	13.7%	16.6%
Canary Islands	15.7%	13.9%	11.0%	22.6%	16.3%
Other destination	70.9%	62.1%	73.2%	63.7%	67.1%
Balearic Islands	2.1%	3.2%	2.9%	3.3%	2.9%
Rest of Spain	7.3%	4.6%	6.6%	5.1%	5.8%
Italy	12.4%	4.7%	10.7%	9.5%	9.3%
France	4.9%	1.2%	0.8%	1.3%	2.1%
Turkey	7.6%	8.8%	7.8%	6.1%	7.5%
Greece	10.3%	15.4%	15.7%	8.9%	12.3%
Portugal	1.5%	1.6%	3.2%	0.9%	1.7%
Croatia	4.0%	4.3%	7.2%	8.9%	6.1%
Egypt	3.7%	2.7%	1.7%	2.5%	2.7%
Tunisia	1.0%	0.9%	0.8%	0.4%	0.8%
Morocco	0.0%	0.0%	1.2%	0.2%	0.3%
Others	16.1%	14.7%	14.7%	16.5%	15.6%

* Percentage of valid answers

What other destinations did they consider for this trip? *

	2023Q1	2023Q2	2023Q3	2023Q4	2023
None (I was clear about "this Canary Island")	10.5%	9.0%	5.4%	7.6%	8.0%
Canary Islands (other island)	28.9%	21.1%	18.1%	18.3%	21.5%
Other destination	60.6%	69.8%	76.4%	74.1%	70.4%
Balearic Islands	5.2%	4.4%	3.0%	4.3%	4.1%
Rest of Spain	10.9%	11.3%	12.3%	11.4%	11.5%
Italy	6.3%	11.4%	13.7%	12.1%	11.0%
France	3.9%	3.2%	0.8%	2.7%	2.5%
Turkey	4.7%	7.1%	6.8%	7.6%	6.5%
Greece	5.5%	10.9%	17.7%	11.5%	11.8%
Portugal	9.1%	7.9%	8.2%	10.3%	8.8%
Croatia	4.0%	6.5%	6.6%	4.0%	5.4%
Egypt	8.8%	5.1%	3.3%	4.6%	5.4%
Others	2.1%	2.0%	3.9%	5.5%	3.3%

* Percentage of valid answers

Importance of each factor in the destination choice



	2023Q1	2023Q2	2023Q3	2023Q4	2023
Climate	83.3%	78.5%	64.8%	77.5%	75.8%
Safety	67.9%	62.7%	69.9%	64.2%	66.4%
Landscapes	67.0%	66.5%	61.0%	62.8%	64.3%
Sea	58.1%	57.3%	53.5%	63.1%	57.7%
Tranquility	57.8%	50.0%	59.7%	52.1%	55.3%
Environment	47.9%	56.7%	46.6%	46.8%	49.4%
European belonging	53.1%	50.8%	53.3%	37.8%	49.4%
Beaches	46.6%	49.0%	45.4%	54.0%	48.4%
Accommodation supply	26.9%	37.1%	50.9%	44.7%	39.7%
Authenticity	34.1%	33.2%	37.5%	36.8%	35.4%
Gastronomy	36.4%	34.4%	31.9%	32.6%	33.9%
Price	34.0%	27.9%	34.1%	36.6%	33.1%
Effortless trip	35.7%	31.8%	30.4%	27.5%	31.6%
Exoticism	27.6%	27.0%	35.6%	30.4%	30.2%
Hiking trail network	22.1%	13.8%	13.1%	17.1%	16.6%
Fun possibilities	15.2%	12.3%	13.3%	10.1%	12.9%
Culture	7.2%	9.0%	8.8%	10.4%	8.7%
Historical heritage	5.6%	9.0%	8.6%	8.9%	7.9%
Nightlife	4.6%	4.4%	8.6%	4.2%	5.6%
Shopping	5.5%	6.2%	4.7%	4.0%	5.2%

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important")

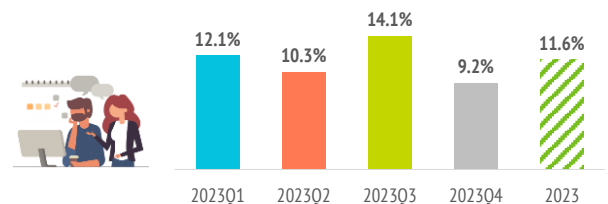
% of tourists who indicate that the factor is "very important" in their choice.

How far in advance do they book their trip?



	2023Q1	2023Q2	2023Q3	2023Q4	2023
The same day	1.6%	1.2%	2.2%	0.0%	1.3%
Between 1 and 30 days	31.6%	33.5%	34.4%	37.4%	34.0%
Between 1 and 2 months	32.0%	32.5%	21.3%	29.9%	28.7%
Between 3 and 6 months	22.8%	22.6%	28.0%	23.5%	24.4%
More than 6 months	12.1%	10.3%	14.1%	9.2%	11.6%

% TOURISTS WHO BOOK MORE THAN 6 MONTHS IN ADVANCE



What channels did they use to get information about the trip?



	2023Q1	2023Q2	2023Q3	2023Q4	2023
Previous visits to the Canary Islands	47.5%	38.5%	22.5%	32.1%	35.2%
Friends or relatives	27.8%	28.0%	25.3%	30.6%	27.7%
Internet or social media	63.3%	65.0%	66.2%	65.3%	64.9%
Mass Media	1.2%	4.7%	4.7%	2.9%	3.4%
Travel guides and magazines	11.3%	10.2%	10.4%	11.7%	10.9%
Travel Blogs or Forums	18.3%	19.2%	16.1%	24.1%	19.2%
Travel TV Channels	2.9%	1.1%	0.6%	0.0%	1.2%
Tour Operator or Travel Agency	23.0%	31.7%	48.2%	31.7%	33.9%
Public administrations or similar	0.6%	0.0%	0.3%	0.5%	0.3%
Others	2.7%	3.8%	1.9%	4.4%	3.1%

* Multi-choice question

Tourist profile by quarter of trip (2023)

POLAND



With whom did they book their flight and accommodation?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Flight					
- Directly with the airline	43.6%	36.4%	18.5%	33.0%	32.8%
- Tour Operator or Travel Agency	56.4%	63.6%	81.5%	67.0%	67.2%
Accommodation					
- Directly with the accommodation	27.5%	19.8%	10.9%	21.1%	19.6%
- Tour Operator or Travel Agency	72.5%	80.2%	89.1%	78.9%	80.4%

Where does the flight come from?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Poland	70.8%	83.8%	96.2%	87.4%	84.4%
Germany	9.5%	6.9%	1.9%	6.5%	6.2%
United Kingdom	14.9%	4.1%	0.5%	0.0%	5.2%
Spanish Mainland	3.3%	1.8%	0.9%	3.5%	2.3%
Switzerland	0.0%	0.0%	0.0%	2.6%	0.5%
Austria	0.2%	0.6%	0.0%	0.1%	0.2%
Others	1.3%	2.8%	0.5%	0.0%	1.2%

Where do they stay?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
1-2-3* Hotel	9.9%	11.3%	8.4%	10.9%	10.1%
4* Hotel	43.7%	52.8%	66.6%	52.1%	54.0%
5* Hotel / 5* Luxury Hotel	2.1%	5.6%	7.1%	3.5%	4.6%
Aparthotel / Tourist Villa	10.0%	9.9%	5.7%	9.1%	8.6%
House/room rented in a private dwelling	12.3%	8.7%	3.0%	9.1%	8.2%
Private accommodation (1)	10.1%	5.1%	5.3%	3.2%	6.1%
Others (Cottage, cruise, camping,...)	11.9%	6.5%	3.7%	12.1%	8.4%

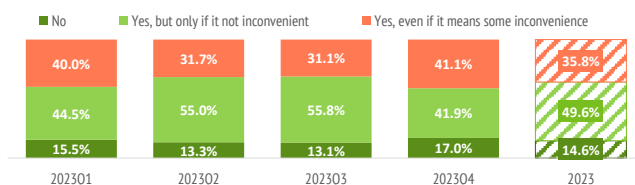
(1) Own property / House of friends or relatives / Free housing exchange / Other private accommodation.

What do they book?

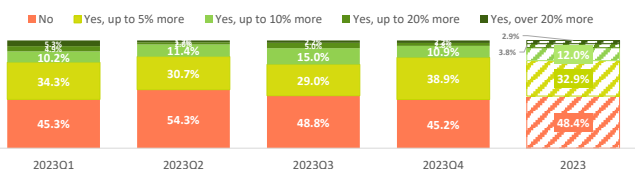
	2023Q1	2023Q2	2023Q3	2023Q4	2023
Room only	31.2%	19.8%	6.1%	19.8%	18.8%
Bed and Breakfast	6.7%	8.1%	7.5%	6.6%	7.2%
Half board	10.6%	11.4%	15.9%	8.3%	11.8%
Full board	1.1%	1.4%	1.4%	0.6%	1.1%
All inclusive	50.4%	59.2%	69.2%	64.8%	61.0%

Sustainable Destination

When booking a trip, do they tend to choose the most sustainable options?

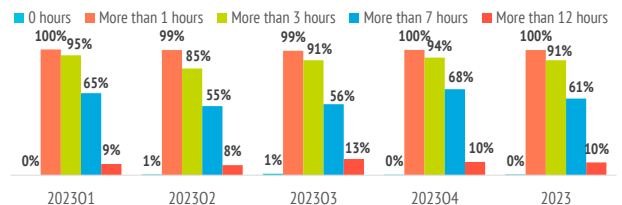


Would they be willing to spend more on travel to reduce their carbon footprint?



Activities in the Canary Islands

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Outdoor time per day					
0 hours	0.0%	0.5%	1.1%	0.3%	0.5%
1 - 2 hours	4.6%	14.7%	7.5%	6.1%	8.1%
3 - 6 hours	30.2%	29.9%	34.9%	25.2%	30.4%
7 - 12 hours	56.3%	46.9%	43.6%	57.9%	50.9%
More than 12 hours	8.9%	8.0%	12.8%	10.5%	10.1%
Outdoor time per day	7.9	7.2	8.0	8.4	7.9



Activities in the Canary Islands	2023Q1	2023Q2	2023Q3	2023Q4	2023
Beach	82.0%	77.3%	82.7%	81.4%	80.9%
Walk, wander	81.0%	75.6%	76.1%	78.9%	77.9%
Explore the island on their own	72.3%	64.7%	62.5%	64.3%	66.1%
Swimming pool, hotel facilities	48.0%	61.9%	68.5%	56.2%	58.7%
Hiking	38.9%	25.2%	28.5%	34.6%	31.8%
Organized excursions	20.9%	26.0%	45.1%	28.6%	30.4%
Taste Canarian gastronomy	30.2%	24.9%	28.5%	19.5%	26.2%
Theme parks	19.4%	23.8%	25.4%	17.4%	21.7%
Sea excursions / whale watching	14.3%	17.3%	23.4%	15.8%	17.8%
Wineries / markets / popular festivals	16.3%	11.8%	14.2%	8.4%	13.0%
Swim	8.4%	11.1%	18.3%	7.5%	11.6%
Museums / exhibitions	14.3%	8.5%	9.6%	8.5%	10.4%
Nightlife / concerts / shows	6.3%	5.7%	8.9%	7.1%	7.0%
Running	10.5%	4.4%	3.5%	6.6%	6.3%
Other Nature Activities	6.8%	5.9%	2.6%	9.3%	5.9%
Scuba Diving	3.4%	3.4%	10.9%	2.1%	5.2%
Practice other sports	4.0%	3.6%	5.0%	4.6%	4.3%
Astronomical observation	1.9%	2.0%	4.9%	3.0%	3.0%
Surf	3.3%	2.1%	2.3%	3.4%	2.7%
Cycling / Mountain bike	1.6%	2.5%	1.1%	4.9%	2.4%
Beauty and health treatments	--	1.7%	4.2%	0.7%	1.7%
Golf	1.8%	1.6%	0.9%	1.1%	1.3%
Windsurf / Kitesurf	0.5%	1.2%	1.2%	1.0%	0.9%

* Multi-choise question

Percepcion of the following sustainability measures during their stay *

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Quality of life on the island	7.6	7.9	7.7	7.9	7.8
Tolerance towards tourism	8.8	8.8	9.0	9.1	8.9
Cleanliness of the island	8.5	8.5	8.3	8.4	8.4
Air quality	8.7	8.9	8.6	9.0	8.8
Rational water consumption	7.1	7.5	7.9	7.9	7.6
Energy saving	6.7	7.1	7.0	7.4	7.0
Use of renewable energy	7.2	7.3	7.0	7.3	7.2
Recycling	7.2	7.5	7.1	7.0	7.2
Easy to get around by public transport	8.0	7.7	7.8	7.3	7.7
Overcrowding in tourist areas	7.0	7.0	6.8	6.4	6.8
Supply of local products	7.3	7.9	7.5	7.3	7.5

* Scale 0 - 10 (0 = Not important and 10 = Very important)

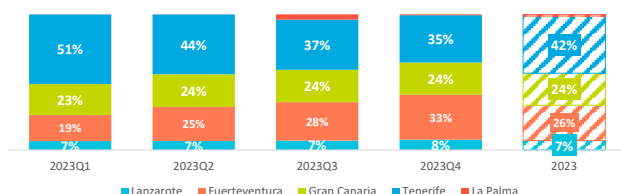
Tourist profile by quarter of trip (2023)

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Which island do they choose?

Tourists (≥ 16 year old)	2023Q1	2023Q2	2023Q3	2023Q4	2023
Lanzarote	4,562	4,050	4,842	4,060	17,513
Fuerteventura	13,326	15,261	19,787	17,773	66,146
Gran Canaria	15,896	14,740	16,685	12,698	60,018
Tenerife	35,739	26,927	25,893	18,623	107,182
La Palma	31	36	2,703	337	3,106



How many are loyal to the Canary Islands?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Repeat tourists	70.9%	47.4%	45.0%	46.3%	53.0%
At least 10 previous visits	11.9%	3.9%	3.2%	5.1%	6.1%
Repeat tourists (last 5 years)	67.0%	43.5%	41.5%	39.5%	48.5%
Repeat tourists (last 5 years) (5 or more)	13.5%	10.5%	4.7%	4.6%	8.5%

Who are they?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Gender					
Men	48.1%	51.0%	51.1%	46.5%	49.3%
Women	51.9%	49.0%	48.9%	53.5%	50.7%
Age					
Average age	39.3	36.9	37.4	37.3	37.8
Standard deviation	13.3	11.4	13.7	12.2	12.8
Age range					
16 - 24 years old	18.4%	11.7%	19.5%	20.1%	17.5%
25 - 30 years old	8.5%	20.6%	18.4%	15.5%	15.6%
31 - 45 years old	44.1%	52.0%	37.6%	43.5%	44.1%
46 - 60 years old	18.7%	11.1%	17.4%	15.3%	15.8%
Over 60 years old	10.3%	4.6%	7.0%	5.6%	7.0%
Occupation					
Salaried worker	45.0%	38.9%	62.0%	44.8%	48.2%
Self-employed	25.8%	27.9%	13.1%	23.4%	22.3%
Unemployed	2.4%	0.0%	1.0%	2.9%	1.6%
Business owner	16.1%	25.1%	15.4%	15.2%	17.9%
Student	5.0%	4.6%	4.5%	6.1%	5.0%
Retired	4.4%	3.1%	3.9%	6.2%	4.3%
Unpaid domestic work	0.3%	0.0%	0.0%	1.4%	0.4%
Others	0.9%	0.4%	0.0%	0.0%	0.4%
Annual household income level					
Less than €25,000	22.0%	29.9%	27.1%	28.8%	26.7%
€25,000 - €49,999	33.2%	39.6%	38.3%	55.3%	40.8%
€50,000 - €74,999	25.9%	14.2%	25.6%	10.3%	19.7%
More than €74,999	0.0%	0.0%	0.0%	0.0%	0.0%
Education level					
No studies	0.0%	0.0%	0.5%	0.0%	0.1%
Primary education	0.6%	1.8%	0.3%	2.1%	1.1%
Secondary education	17.4%	15.6%	19.2%	22.4%	18.5%
Higher education	82.0%	82.6%	79.9%	75.5%	80.2%

Share by islands	2023Q1	2023Q2	2023Q3	2023Q4	2023
Lanzarote	6.6%	6.6%	6.9%	7.6%	6.9%
Fuerteventura	19.2%	25.0%	28.3%	33.2%	26.0%
Gran Canaria	22.9%	24.2%	23.9%	23.7%	23.6%
Tenerife	51.4%	44.1%	37.0%	34.8%	42.2%
La Palma	0.0%	0.1%	3.9%	0.6%	1.2%

How many islands do they visit during their trip?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
One island	79.9%	87.4%	78.1%	88.7%	83.1%
Two islands	16.1%	11.4%	20.8%	10.5%	15.1%
Three or more islands	4.0%	1.2%	1.1%	0.9%	1.9%

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2023Q1	2023Q2	2023Q3	2023Q4	2023
Average rating	9.20	9.13	8.81	9.14	9.07

Experience in the Canary Islands	2023Q1	2023Q2	2023Q3	2023Q4	2023
Worse or much worse than expected	1.9%	1.3%	6.8%	2.4%	3.2%
Lived up to expectations	52.5%	47.7%	53.3%	49.6%	51.0%
Better or much better than expected	45.5%	51.0%	39.9%	47.9%	45.8%

Future intentions (scale 1-10)	2023Q1	2023Q2	2023Q3	2023Q4	2023
Return to the Canary Islands	9.06	9.02	8.30	8.98	8.82
Recommend visiting the Canary Islands	9.41	9.27	8.86	9.37	9.21

Who do they come with?

	2023Q1	2023Q2	2023Q3	2023Q4	2023
Unaccompanied	5.4%	6.7%	3.3%	7.6%	5.6%
Only with partner	36.0%	43.6%	44.0%	37.4%	40.3%
Only with children (< 13 years old)	5.5%	3.5%	5.3%	5.3%	4.9%
Partner + children (< 13 years old)	10.0%	11.5%	7.9%	10.2%	9.8%
Other relatives	17.7%	13.6%	16.1%	10.2%	14.7%
Friends	10.8%	5.6%	5.2%	8.3%	7.5%
Work colleagues	0.5%	0.0%	1.0%	2.7%	1.0%
Organized trip	0.0%	0.0%	0.0%	0.8%	0.2%
Other combinations (2)	14.0%	15.5%	17.3%	17.4%	16.0%

(2) Combination of some of the groups previously analyzed

Tourists with children	31.3%	25.7%	20.2%	18.8%	24.3%
- Between 0 and 2 years old	0.9%	2.8%	0.0%	0.7%	1.1%
- Between 3 and 12 years old	29.3%	21.8%	19.4%	16.8%	22.1%
- Between 0 - 2 and 3-12 years old	1.1%	1.1%	0.9%	1.3%	1.1%
Tourists without children	68.7%	74.3%	79.8%	81.2%	75.7%
Group composition:					
- 1 person	6.7%	9.4%	3.9%	11.0%	7.5%
- 2 people	50.7%	52.4%	53.9%	48.6%	51.6%
- 3 people	22.0%	17.9%	20.1%	15.6%	19.1%
- 4 or 5 people	16.8%	16.0%	19.2%	22.4%	18.4%
- 6 or more people	3.8%	4.3%	3.0%	2.4%	3.4%
Average group size:	2.80	2.73	2.70	2.64	2.72

*People who share the main expenses of the trip

Source: Encuesta sobre el Gasto Turístico (ISTAC).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.