



Market Brief: December 2012

Poland Outbound

- Over the past two decades, Poland's economic growth and subsequent rise in consumer disposable income has made outbound travel more accessible to its citizens. By Western standards, however, outbound travel is still a developing market with much opportunity for growth.
- Traditionally, foreign travel was limited to nearby countries, particularly in Eastern Europe and Germany, which are easily accessible by car and relatively cheap to visit.
- Polish citizens stay close to home when travelling abroad, largely remaining within the confines of Europe. Eastern European markets sharing borders with Poland, namely Lithuania, Belarus, Ukraine, Slovakia, Germany and the Czech Republic, are the most traditional destinations visited by Poles.
- The liberalization of the airline industry and expansion of low-cost flights from 2004 onwards has radically altered destination choice, making travel within the EU more affordable and many countries more accessible.
- Southern European and North African countries are very popular with Poles – Egypt, Spain, Croatia, Turkey and the Greek Islands are all principal destinations attracting more Polish tourists in search of combination of sun, landscapes and culture.
- The Greek islands – notably Zakynthos, Crete and Rhodes – are a major draw during the summer months. All three islands saw a significant rise in 2011. The situation has changed markedly in 2012 following the collapse of several Polish tour operators. Rhodes witnessed a 30% decline in Polish tourists by air between January to September 2012, compared to the same period in 2011, according to Rhodes Airport.
- Social unrest and protests against the Greek austerity reforms may have dissuaded some Polish travellers from visiting Greece. However, the majority of Poles visit the Greek islands, which have had little issues with rioting.