

Outlook for Travel to Britain

- According to the statistics of the Civil Aviation Office, in the first six months of 2009 Polish airports served 6.8 million passengers which is 13.4 % less than a year ago. Great Britain and London are still the most popular flight destinations (over 2 million Polish passengers flew to the UK during the first two quarters of 2009, of which 1.3 million passengers flew to London).

Britain in the News

- Most of tourism media coverage was positive or neutral in tone describing British attractions, products or events (in many articles, London was recommended for Christmas shopping or Christmas and New Year city breaks).
- Information about H1N1 (swine) flu and flooding in Cumbria did not impact on the perception of Britain as a holiday destination.

General Market Mood

- In Q3/2009 Poland's GDP increased by 1.7% , slightly above expectations, making Poland the only EU member-state noting economic growth at that time. According to Prime Minister Donald Tusk, if the second wave of the global economic crisis does not occur, Poland should be in for a more peaceful period. Tusk stated that Poland had already emerged from what was the worst in the global crisis (Source: the Central Statistical Office, IntelliNews).
- This year's growth figures highlight Poland as clearly the best performing of the emerging countries in Central and Eastern Europe. Explanatory factors include the relatively modest share of trade as proportion of GDP, a relatively modest sound financial sector and continued growth in consumer spending (Source: Oxford Economics).

Consumer Behaviour

- According to the survey of the Polish Institute of Tourism, number of individual trips has increased during the 3 quarters of 2009. As a result, number of visitors staying as free guests with family and friends has increased as well. It means that number of Polish VFR travellers in the UK might increase in 2010.
- According to the survey of the Polish Institute of Tourism, the number of leisure trips abroad decreased by 12% from January to September 2009. However, the average spend per day increased by 27%.

Media Matters

- The percentage of households with internet access or broadband connections rose in Poland to 59% in 2009 from last year's 48%, the EU statistical office Eurostat has reported. It added that Broadband connections are available at 51% of Polish households compared to 38% in 2008 (IntelliNews).
- In September, ZenithOptimedia expected the Polish advertising market to decrease by 5.9% this year to PLN 7.29bn. Earlier, it saw the Polish market's decline at 4.2% in 2009.
- The government adopted a strategy for the transition from analogue to digital broadcasting via 'digital islands' until the complete analogue switch-off in 2014. Launch of digital TV broadcasting will start in Warsaw (multiplex 1) and in five towns of Wielkopolska province (multiplex 2).

Routes and Fares

- Wizz Air is going to increase capacity on its Polish network by 30% in 2010. It carried 3.6 million passengers in Poland in 2009 and plans to fly 4.7 million passengers in 2010. From 17th July 2010, the carrier will also re-open services to Dortmund and Doncaster-Sheffield and increase weekly frequency on Wroclaw – London Luton route from 4 to 7.
- In October, Aer Lingus opened a new route from Okecie Airport in Warsaw to London Gatwick. WizzAir is the second low cost carrier which operates flights from Okecie (at the end of March all low cost airlines were moved from Etiuda terminal to terminal 1 at Warsaw's Okęcie airport, which is more expensive for the airlines. As a result, Ryanair and EasyJet decided to withdraw from Warsaw airport).

Business Tourism

- According to the survey of the Polish Institute of Tourism, the number of business trips has decreased in 2009 due to budget cuts in companies and institutions. The number of business trips is forecast to grow slightly in 2010.

Leisure Travel Trade

- Itaka (one of the largest wholesalers of tours) is going to launch luxury sub-brand in 2010 (source: www.tur-info.pl). The luxury market is still developing in Poland but according to online travel agencies: EasyGo.pl i Wakacje.pl about 28% clients made reservations over 5 000 PLN (£1110) in 2009 (the trips over 5000 PLN are considered as luxury products in Poland).

Competitor Activity

- Interest in Slovakia has decreased after Slovakia joined euro zone in 2009). The number of trips to Greece, Egypt and Turkey has also decreased this year.
- The number of tourists travelling to Italy, Germany and Austria has increased in 2009 (Polish Institute of Tourism).
- Slovakia ran a large campaign promoting skiing.
- TAP Portugal and the Portuguese Tourist Board run a campaign promoting flights to Lisbon – the campaign includes outdoor, press and online activities.
- The Moroccan Tourist Board ran an outdoor campaign since October.

VisitBritain Activity Update

- 17 September – 30 November - 'Britain Rocks' campaign (data capture: 9900 emails, page visits: 28688, page views: 52,145).
- 27 November Development session in the British Embassy on the campaign: 'Olympics 2012 - See Britain Through My Eyes'.
- November / December – a joint campaign with Ryanair (still in progress).

Upcoming activity

- 14 January – 'Meet Polish travel trade and press' in Warsaw (press breakfast and travel trade workshop for UK suppliers and Polish travel trade).
- Mid February – March 'Cities Britain' campaign.
- Best of Britain and Ireland arrangements (January – February).
- Scottish EXPO arrangements (February – March).

Who's in Town?

- Greg Wilson from Liverpool who began his career as a DJ in 1975 and is regarded as one of the most important figures on the UK dance scene was a special guest of the British event organized in Warsaw as a part of 'Britain Rocks' campaign in Poland.