

# Market and Trade Profile: Poland

Poland





## Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Polish travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Polish visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at Polish consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by Polish people are also highlighted.
- **Chapter 3: Access and travel trade** shows how Polish people travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Polish travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.



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# Chapter 1: Inbound market statistics





## Chapter 1: Inbound market statistics

### Chapter summary

- The Polish outbound market is forecasted to account for 19.9 million trips abroad with at least one overnight stay by 2020. The UK was the most popular destination, ahead of Italy, for such trips in 2016.
- The Polish rank globally in 35<sup>th</sup> place for international tourism expenditure with US\$8bn.
- Poland was the 8<sup>th</sup> largest inbound source market for the UK for volume and 16<sup>th</sup> most valuable for visitor spending in 2016.
- Visits from Poland to the UK overall set a new record with 1.9 million in 2016.
- The Polish source market has an excellent seasonal spread with October-December and January-March being the strongest quarters for volume of visits.
- 90% of departing Polish visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.

**2016:  
£389m  
spend in  
UK**

Source: International Passenger Survey by ONS, Oxford Economics (overnight trips), UNWTO, CAA 2016 (asked to leisure visitors)



## Chapter 1.1: Key statistics

### Key insights

- Poland is Britain's 8<sup>th</sup> largest source market in terms of visits and 16<sup>th</sup> most valuable for visitor spending (2016). Visits from Poland to the UK overall grew to a record 1.9 million in 2016.
- 41% of spending came courtesy of those visiting family and/or friends in the UK, 26% from business visits and 17% from holiday visits in 2016.
- Polish business visits and those visiting friends and/or family in the UK have led growth in recent years and set new records in 2016 with 872,000 and 760,000 visits respectively.
- London is the leading destination for a trip to Britain but South East, West Midlands and North West are also popular (based on the average nights spent in the UK 2014-2016).
- The most popular activities undertaken by Polish travellers in Britain include shopping, dining in restaurants and going to the pub as well as socialising with the locals and sightseeing famous monuments/buildings.

**The UK is the most visited destination for Polish outbound overnight trips (2016)**

Source: International Passenger Survey by ONS, Oxford Economics (overnight trips)



## 1.1 Key statistics: global context and 10 year trend

### Global context

Measure	2016
International tourism expenditure (US\$bn)	8.0
Global rank for international tourism expenditure	35
Number of outbound overnight visits (m)	15.9
Most visited destination	UK

### Inbound travel to Britain overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
<b>10 year trend</b>			
2007	1,294	15,869	392
2008	1,492	17,308	508
2009	1,041	12,028	362
2010	1,101	10,731	313
2011	1,057	10,141	340
2012	1,222	11,751	337
2013	1,339	11,806	447
2014	1,494	11,948	356
2015	1,707	13,865	438
2016	1,921	15,002	389
<b>Share of UK total in 2016</b>	5.1%	5.4%	1.7%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics (overnight trips)



## 1.1 Key statistics – volume and value

### Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	1,921	13%	8
Nights (000s)	15,002	8%	5
Spend (£m)	389	-11%	16

### Nights per visit, spend

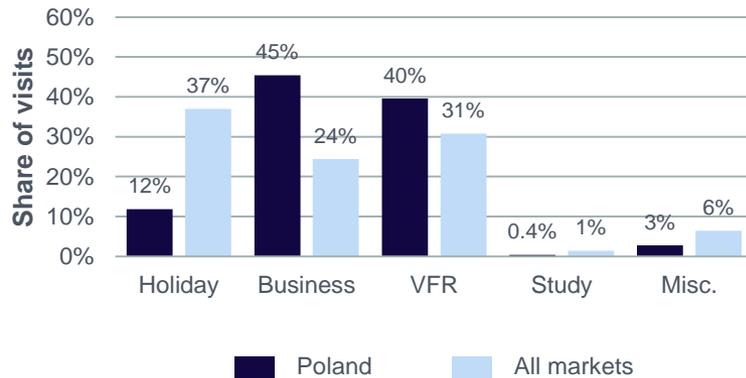
Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	8	£35	£288
Business	3	£36	£115
Visiting Friends/Relatives	11	£19	£212
All visits	8	£26	£203

Source: International Passenger Survey by ONS

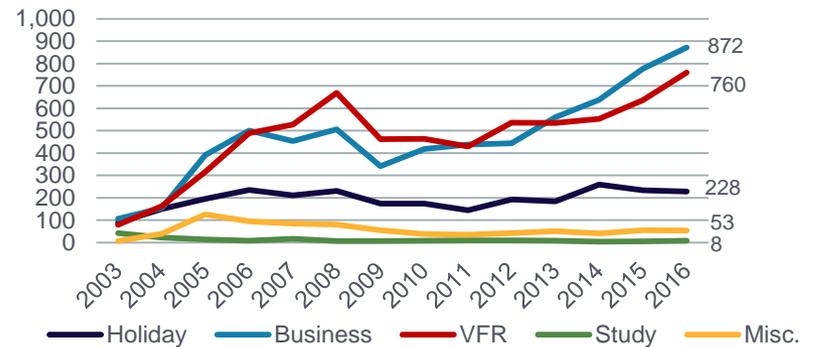


# 1.1 Key statistics: journey purpose

Journey purpose 2016



Journey purpose trend (visits 000s)



- 45% of all visits to the UK from Poland were made for business purposes, followed by 40% of visits made to visit friends and/or relatives in 2016. The proportion of holiday visits is well below average.
- 46% of holiday visits from Poland to the UK in 2015 (excl. UK nationals) were made by repeat visitors (well below the European average of 67%). These repeat visitors came on average between two and three times (a medium average visit frequency compared to other markets) and spent on average £799 in the UK in the past ten years.

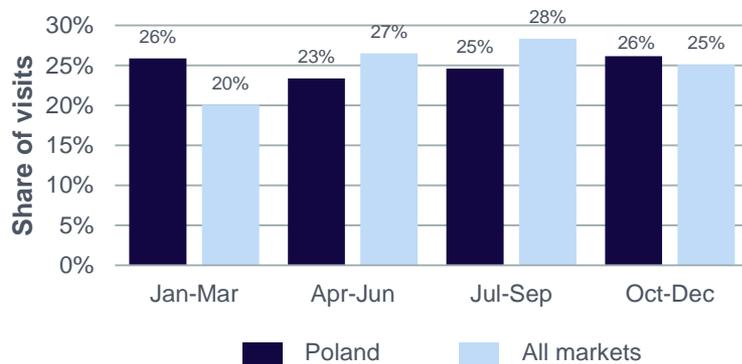
- Business visits and those visiting friends and/or family have led growth in recent years and set new records in 2016 with 872,000 and 760,000 visits respectively. 78% of Polish business visits to the UK came by lorry in 2016 (delivery/pick up of goods).
- In 2016, 41% of spending came courtesy of visits to friends and/or relatives, 26% from business visits and 17% from holiday visits.
- 94% of those coming to the UK for business visits (excl. expats) had been to the UK before, followed by those coming to visit friends or relatives who live in the UK (73%).

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015



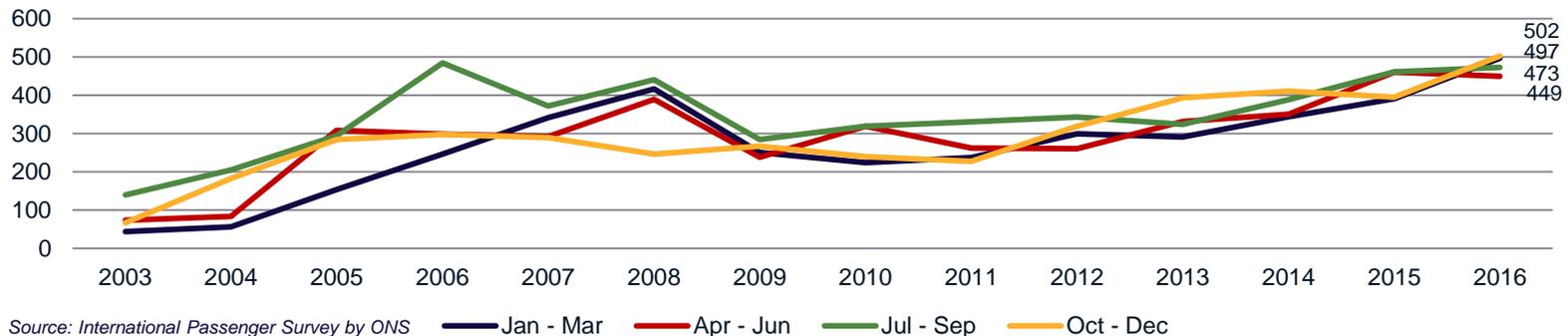
# 1.1 Key statistics: seasonality

## Seasonality 2016



- Visitors from Poland show excellent seasonal spread supporting tourism in the UK in high but also low and shoulder season. With Polish visits fairly evenly distributed throughout the year, the strongest quarters for visits are the first and the last quarter of the year.
- The volume of visits is fairly similar for the first and last quarter which both peaked in 2016 at new record levels. The summer months also showed growth and closed not far off pre-financial crisis records by volume. The April-June period set a record in 2015 with 460,000 visits which was almost matched in 2016.

## Seasonality trend (visits 000s)



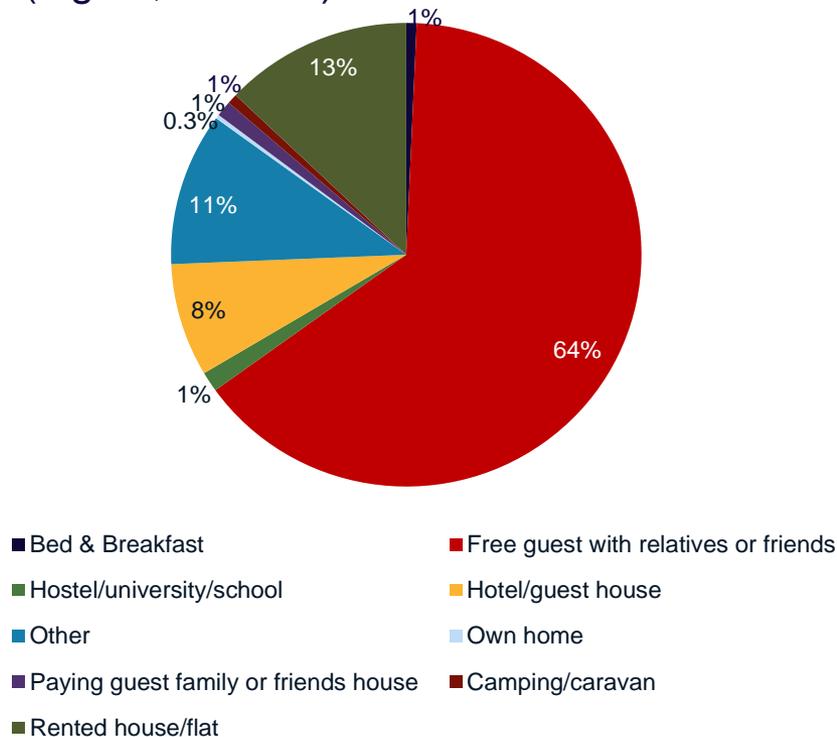
Source: International Passenger Survey by ONS

— Jan - Mar    — Apr - Jun    — Jul - Sep    — Oct - Dec



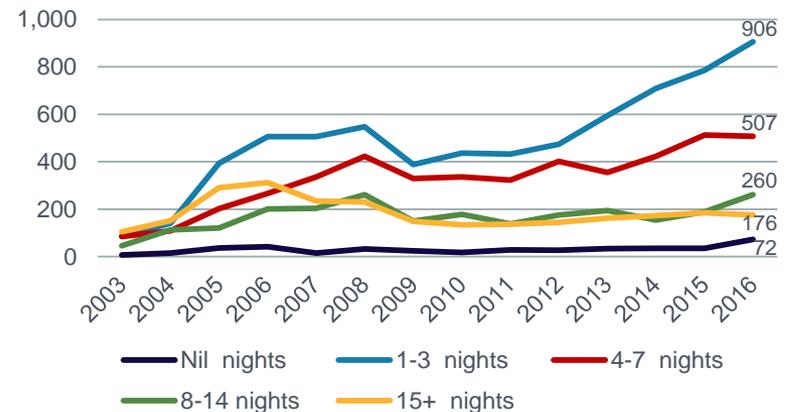
# 1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2016  
(nights, %share)



Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



- Short trips of 1-3 nights are the most popular duration of stay among Polish visitors (accounting for 47% of Polish visits), followed by 4-7 nights (26%). 23% of Polish visitors stayed longer than a week.
- One form of accommodation clearly dominates the picture with more than three out of five visitor nights spent staying for free with relatives or friends. Rented houses/flats and other forms of accommodation were also popular, making up 13% and 11% of nights in 2016. Less than one in ten nights were spent in a hotel/guest house in the same year.



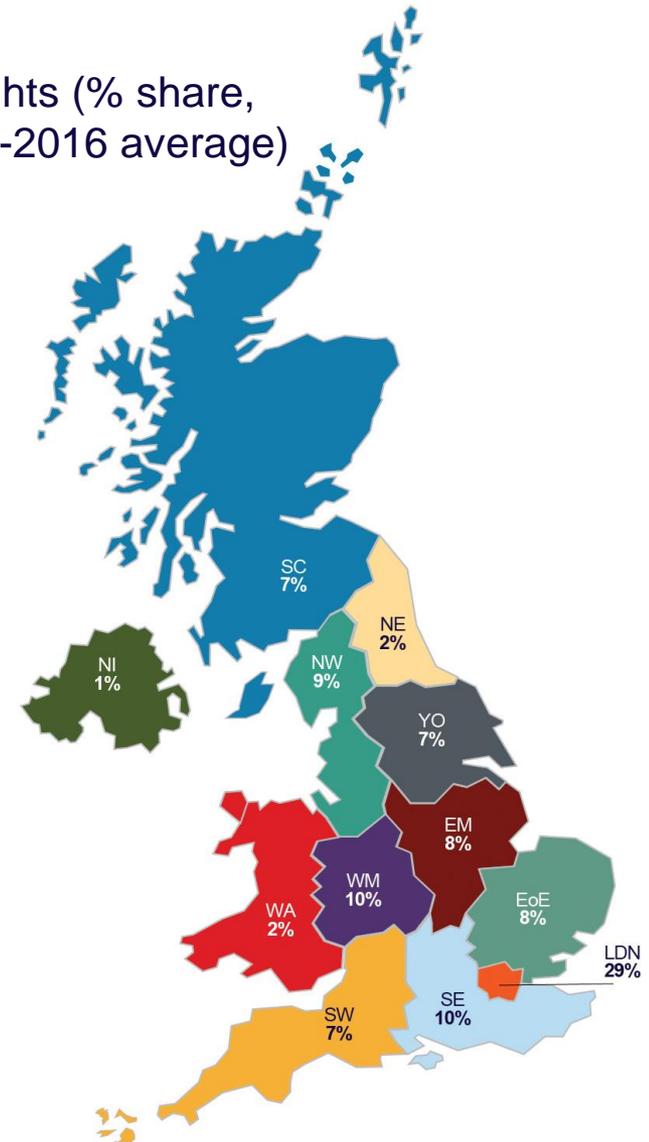
## 1.1 Key statistics: regional spread

### Visits to the UK in (2014-2016 average)

Region	Nights stayed (000)	Visits (000)
Total	13,608	1,708
Scotland (SC)	917	121
Wales (WA)	313	49
Northern Ireland (NI)	119	13
London (LDN)	3,893	504
North East (NE)	226	28
North West (NW)	1,194	179
Yorkshire (YO)	1,008	106
West Midlands (WM)	1,328	224
East Midlands (EM)	1,049	131
East of England (EoE)	1,069	166
South West (SW)	992	125
South East (SE)	1,425	249
Nil nights (Nil)	N/A	47

Source: International Passenger Survey by ONS

Nights (% share, 2014-2016 average)



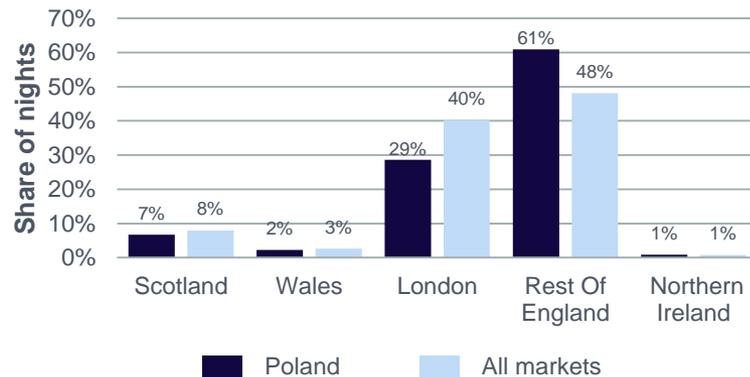


# 1.1 Key statistics: regional spread and top towns and cities

## Top towns and cities visited

Town	Visits (000s, 2014-2016 average)
London	504
Birmingham	149
Manchester	77
Bristol	49
Edinburgh	48

## Regional spread (2014-2016)



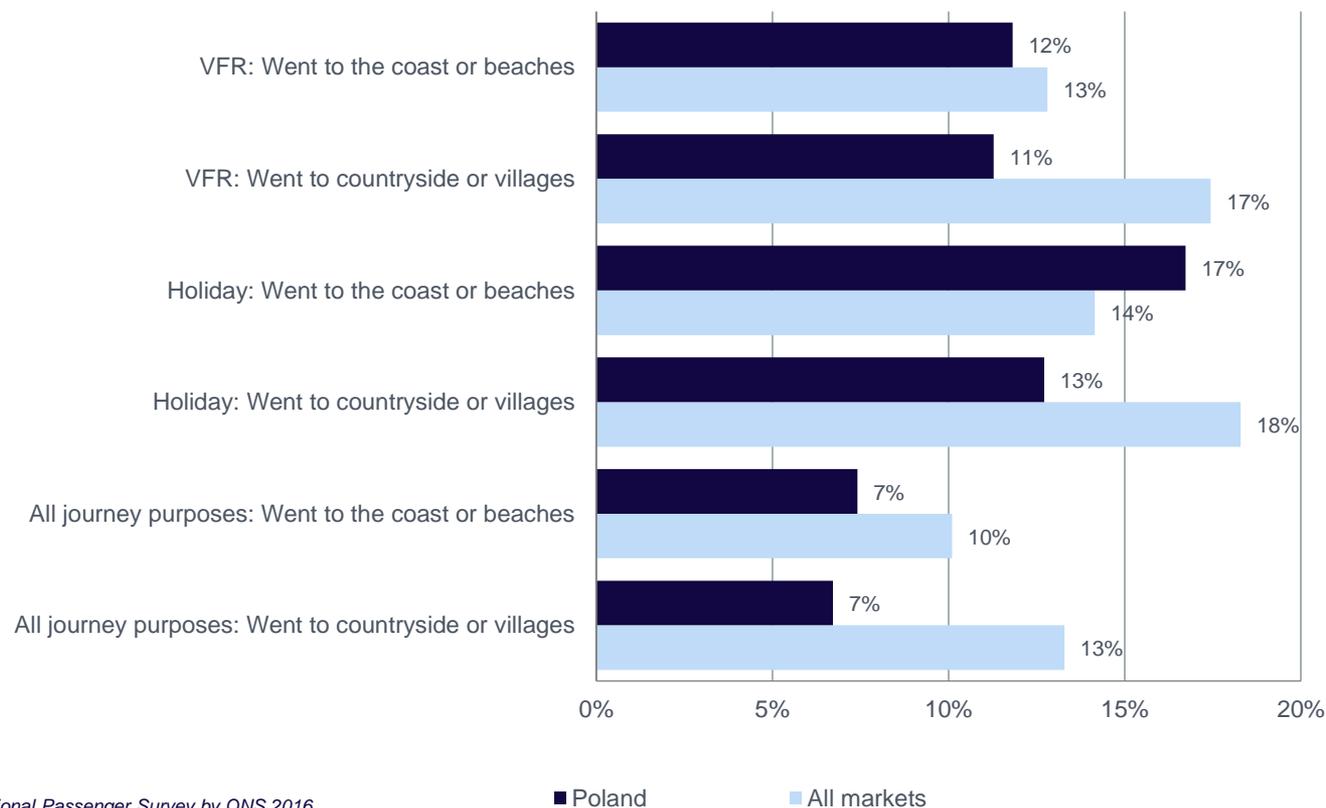
- London is the leading destination for a trip to Britain, accounting for 29% of visitor nights, although this is well below the 40% share of nights London receives from all visitors to the UK.
- South East, West Midlands and North West are also popular, based on the average nights spent in the UK from 2014-2016. Poles are more likely to stay in the Rest of England, with 61% of visitor nights spent there, against 48% from all markets.
- Polish visits in general have a below average propensity to feature rural areas of Britain. Holiday visits have a slightly above average propensity to involve some time on the coast/beach.
- A below average proportion of Polish visits to the UK have been bought as a package or all-inclusive tour. Most Polish visits were organised independently in 2016 (please note ONS definition of package holiday on page 16).
- Polish travellers have an above-average propensity to bring their own vehicle when they visit the UK.

Source: International Passenger Survey by ONS



# 1.1 Key statistics: visits to coast, countryside and villages

## Propensity to visit coast, countryside and villages

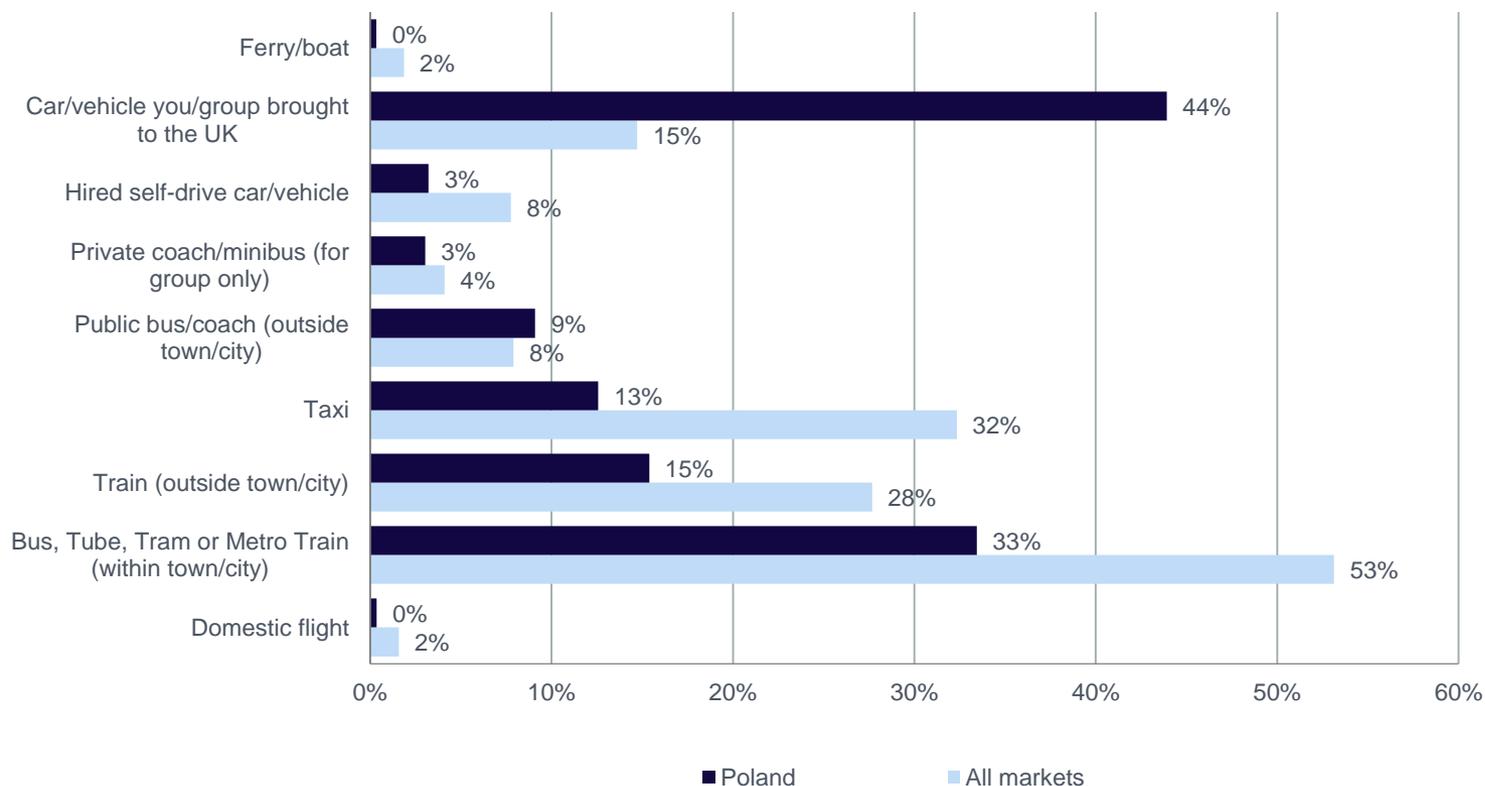


Source: International Passenger Survey by ONS 2016



# 1.1 Key statistics: use of internal modes of transport

## Propensity to use internal modes of transport

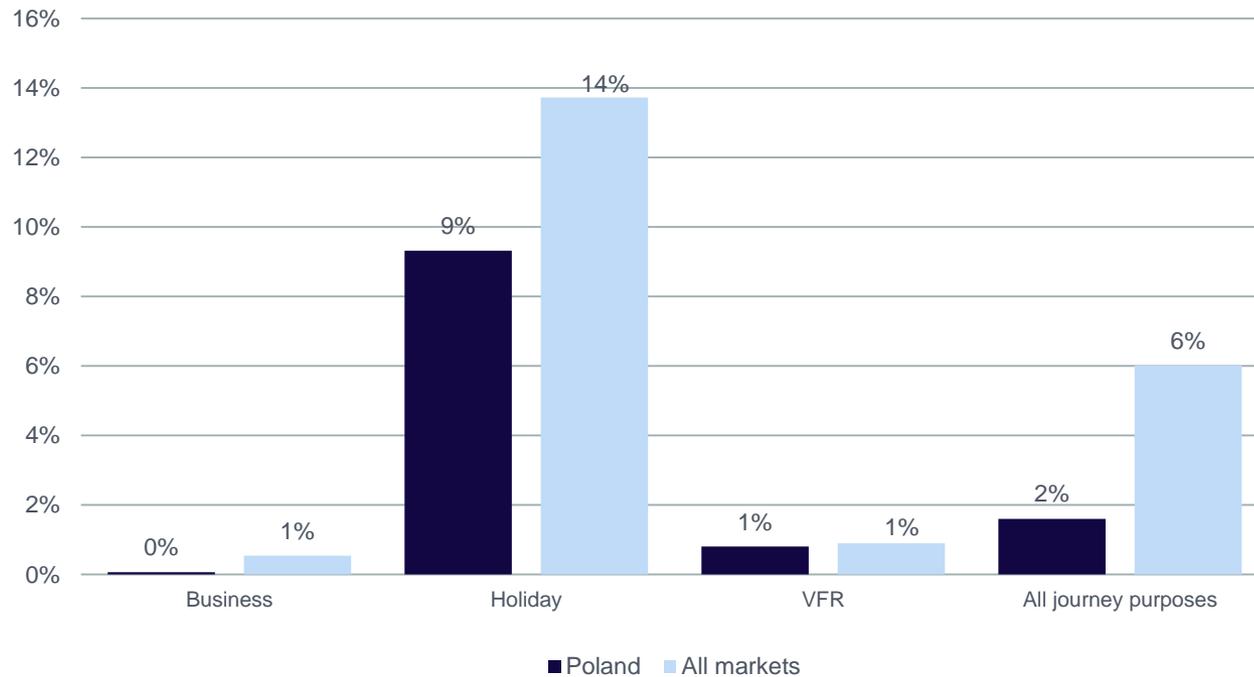


Source: International Passenger Survey by ONS, 2013



## 1.1 Key statistics: purchase of package tours

Proportion of visits that are bought as part of a package or all-inclusive tour in 2016



International Passenger Survey by ONS

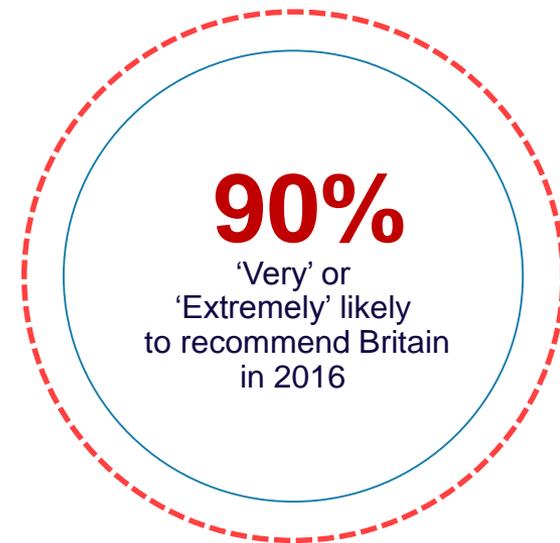
*To be defined as a package, a trip must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. While some respondents may not know the separate costs of their fares and their hotel because they bought several air tickets and several sets of hotel accommodation from their travel agent, the ONS definition of a package is that the costs cannot be separated.*



## 1.2 Visitor demographics

### Visitor characteristics

- Almost all business visitors from Poland are male but Britain attracts more female than male leisure visitors.
- Less than half of holiday visitors are making a repeat visit to Britain (excl. UK nationals).
- Almost all visits from Poland to the UK were made by Polish nationals (98%) and fewer than 1% by British nationals in 2016.
- 90% of departing Polish travellers are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.
- 87% of departing Polish felt 'Very' or 'Extremely' welcome in Britain.

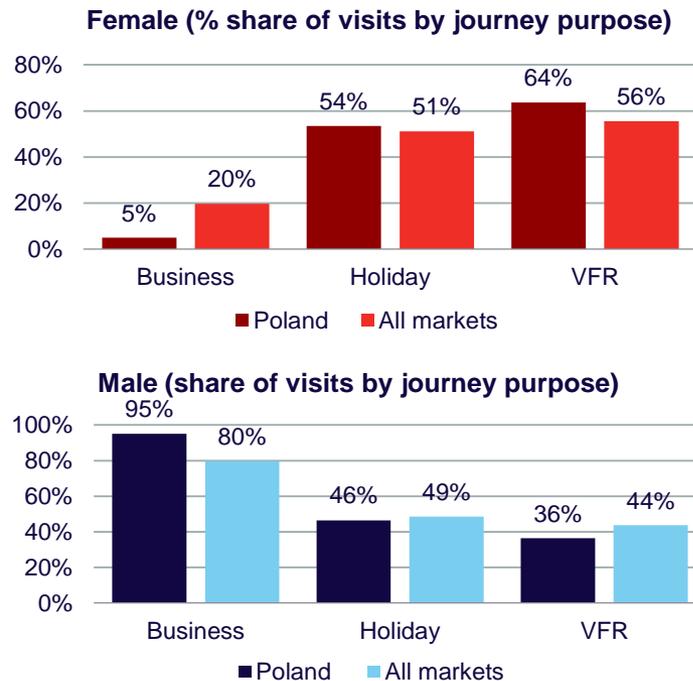


Source: International Passenger Survey by ONS, CAA 2016 (asked to leisure visitors)



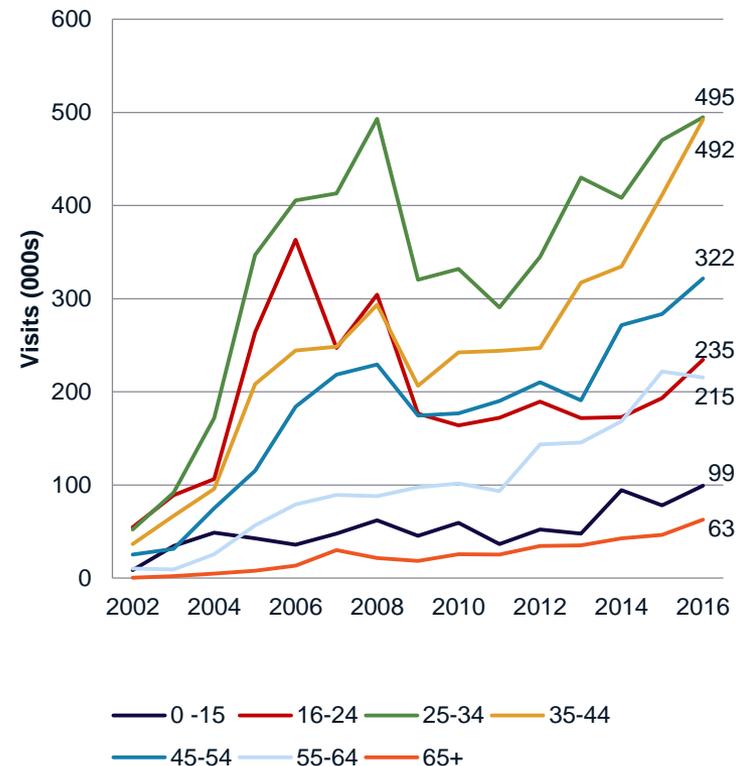
## 1.2 Visitor demographics: gender and age groups

Visitor demographics:  
gender ratio of visits from Poland:  
35% female, 65% male



Source: International Passenger Survey by ONS

### Age group trend



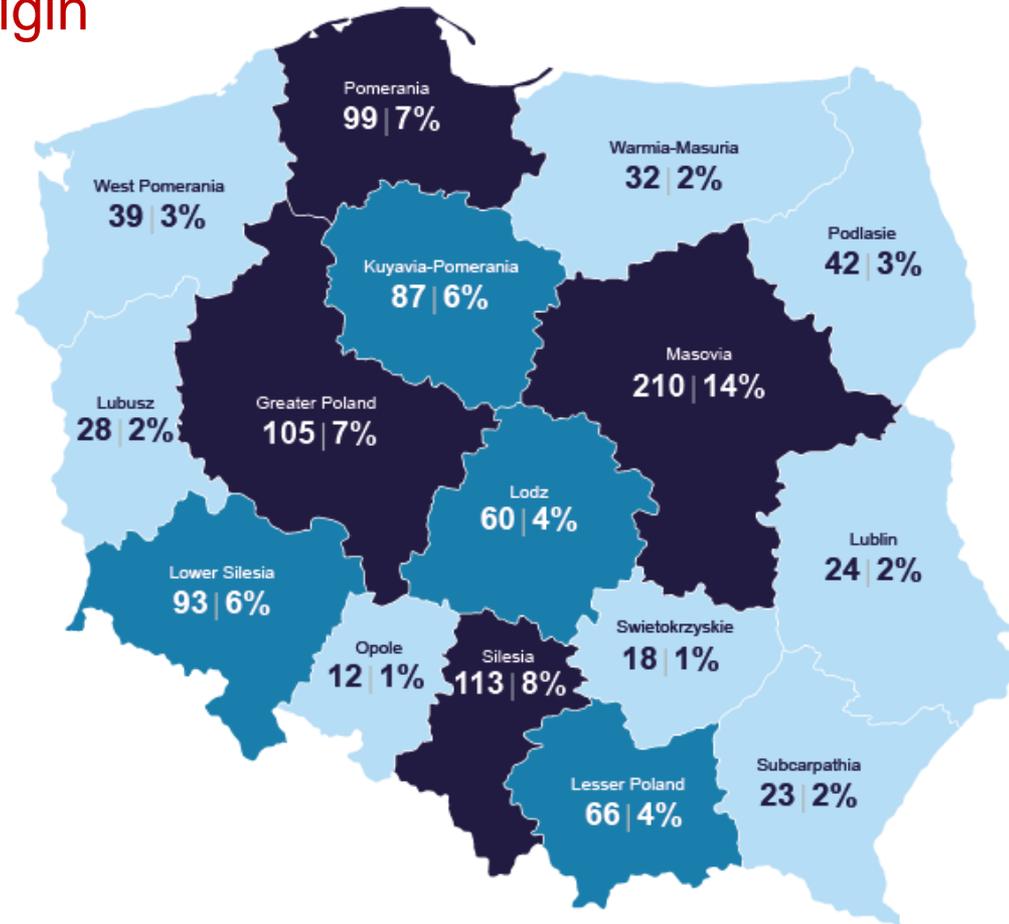
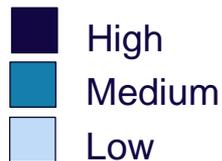


## 1.2 Visitor demographics: origin

### Visits to the UK in (000) 2008

- The largest proportion of Polish visitors who came to the UK reside in the regions of Masovia (incl. Warsaw), Silesia, Greater Poland, Pomerania, Lower Silesia and Kuyavia-Pomerania.
- The population in general tends to be concentrated most in the southern area around Krakow and the central areas around Warsaw and Lodz as well as in the northern coastal city of Gdansk.

Visits in 000s | % share of visits

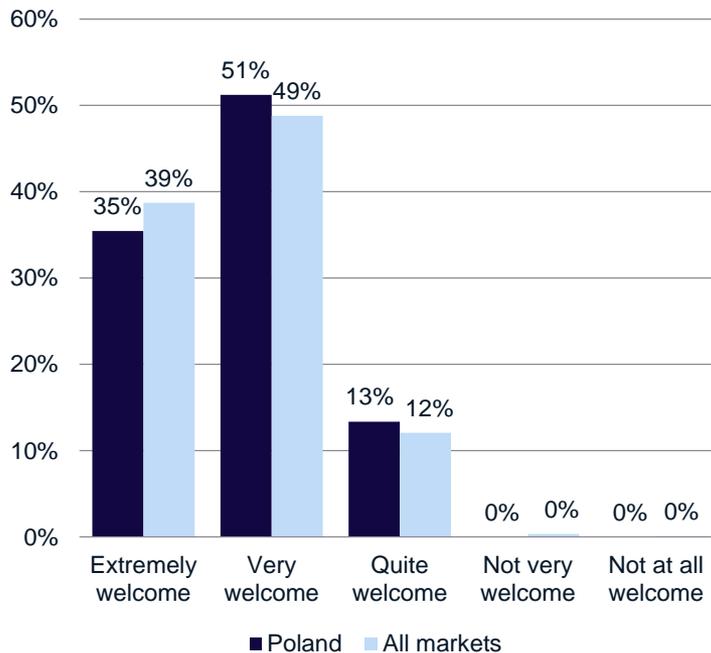


Source: International Passenger Survey by ONS, CIA World Factbook 2018 % share of visits calculated incl. unknown

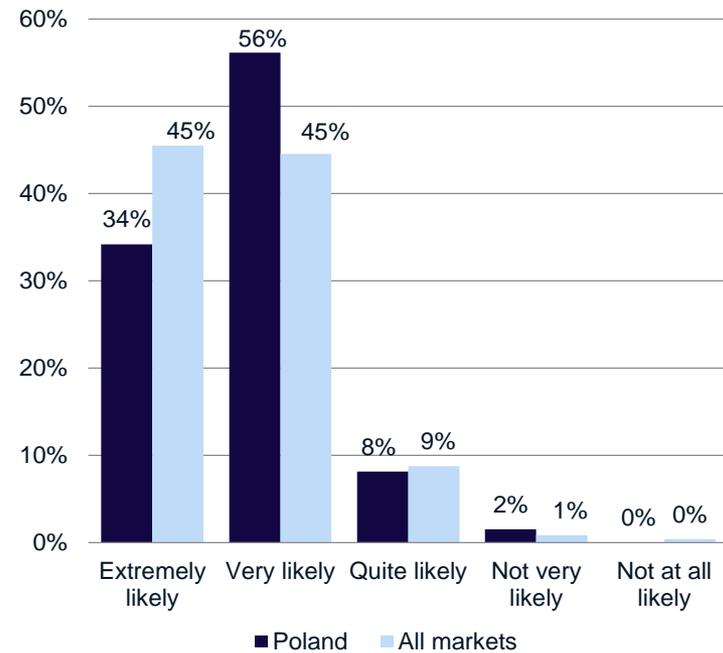


# 1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: CAA 2016 (asked to leisure visitors) (don't know excluded)



## 1.3 Britain and competitors

### Market size, share and growth potential

- Britain was the most visited destination by Polish travellers in 2016, ahead of Italy.
- Forecasts suggest that overnight trips from Poland to Britain will increase further by 28% over the next several years (2016-2025). The overall volume of outbound trips from Poland is forecasted to grow strongly by 63% in the same timeframe.
- An increasing proportion of the Polish resident population aged 15+ participates in tourism with at least one private trip per year. In 2016 18.4 million took part (5% growth on 2015).
- The overall volume of trips taken by Polish residents aged 15 or above also grew by 8% year-on-year in 2016. Domestic trips dominated the picture with about 44 million of trips taken within Poland – almost 61% of these were short trips of a duration of two to four days.

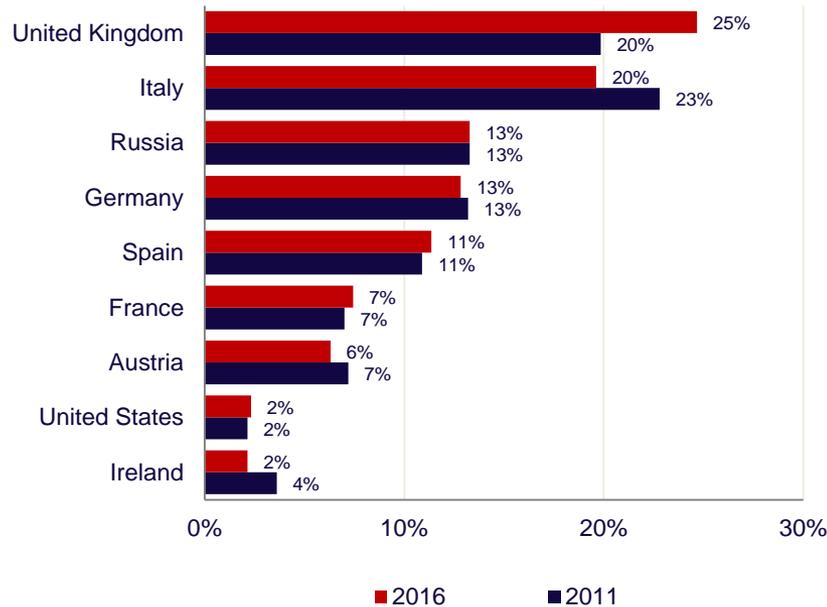


Source: Oxford Economics (outbound overnight trips), "Tourism in 2016" by Polish Central Statistics Office GUS

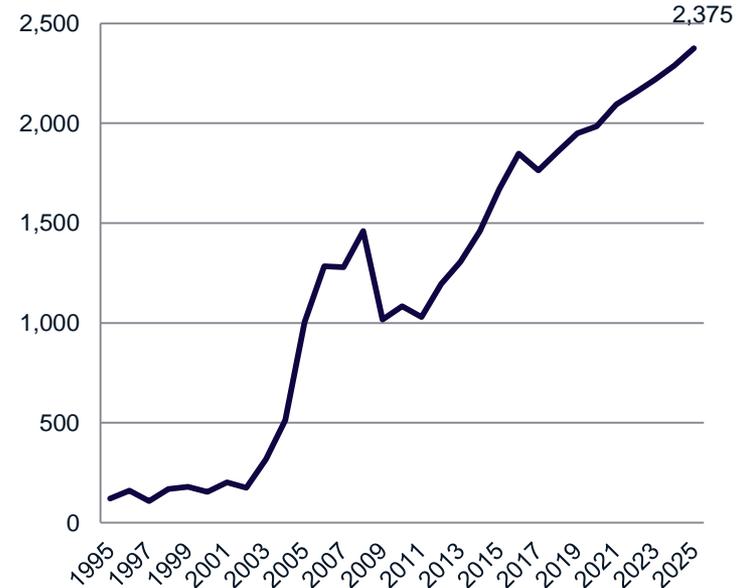


## 1.3 Britain and competitors

Britain's market share of Polish visits among competitor set



Historic and potential visits to Britain (000s)



Source: Oxford Economics (outbound overnight trips)



## 1.4 Inbound activities

### Inbound Britain activities

- Shopping is the most popular activity, included in more than three in five holiday visits from Poland.
- Many Polish holiday visitors like to dine in a restaurant or visit a pub while in Britain, although they have a lower propensity to do so than the average visitor to the UK.
- Almost half of Polish holiday visits involve time in a park or garden.
- Built heritage sites, and especially museums, are important attractions for many Polish holiday visitors. Sightseeing features in over two in five such visits.
- More than one in four holidaymakers like to socialise with the locals during their trip.
- Almost 13,000 visits per annum from Poland feature time watching football.

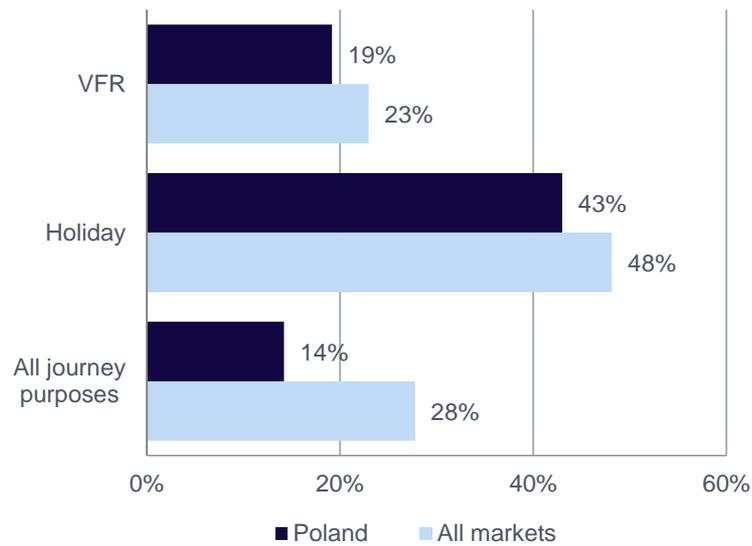


Source: International Passenger Survey by ONS

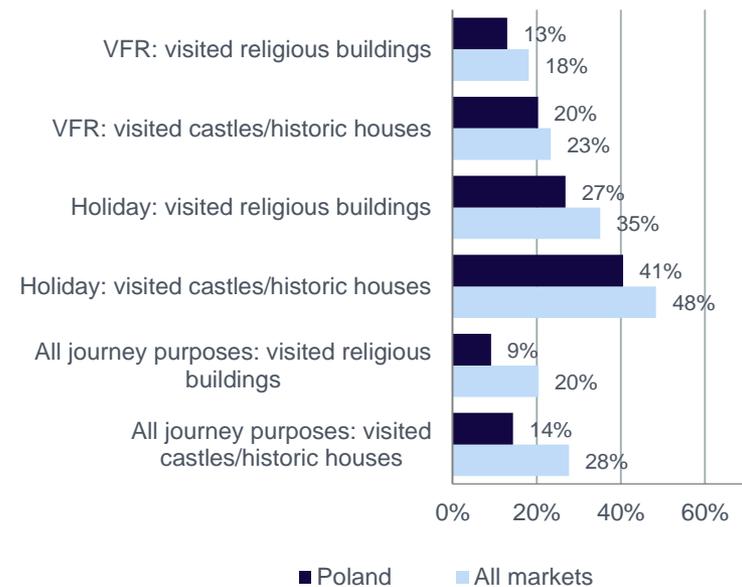


## 1.4 Inbound activities

Propensity to visit museums and galleries



Propensity to visit built heritage sites

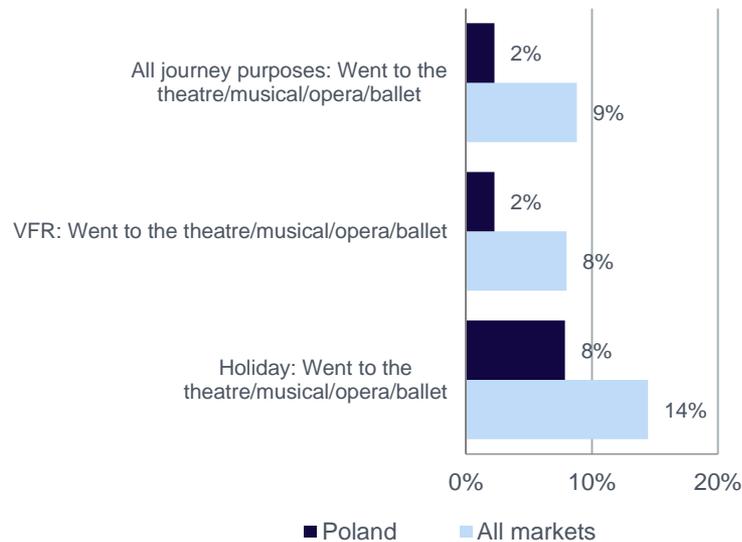


Source: International Passenger Survey by ONS 2016

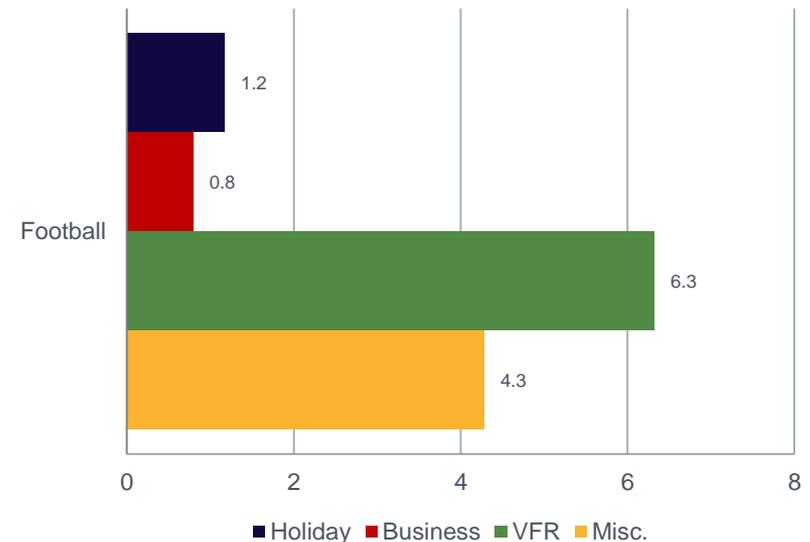


# 1.4 Inbound activities

Propensity to attend the performing arts



Number who went to watch sport live during trip (000s)

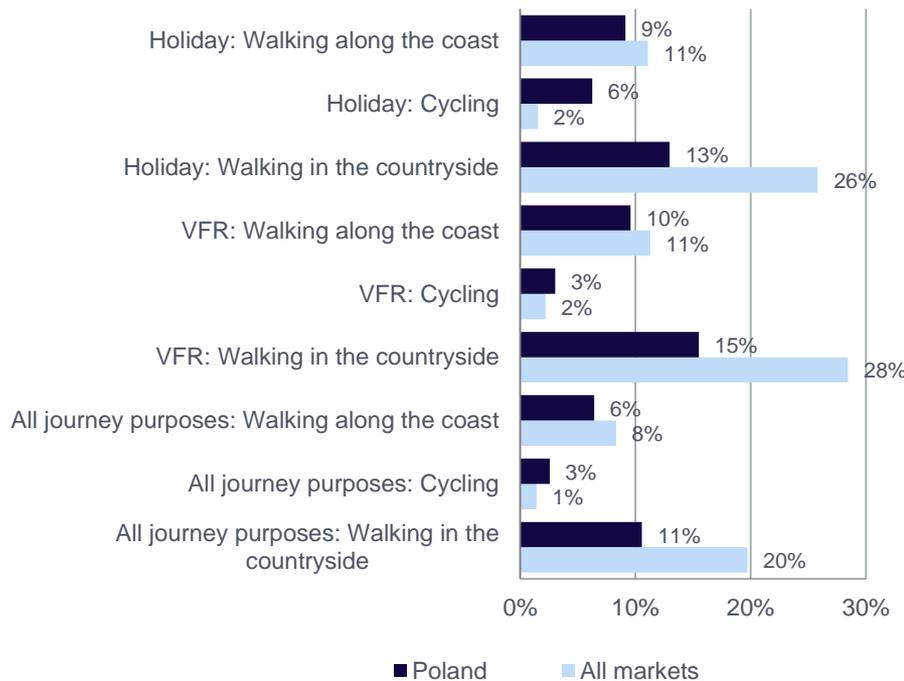


Source: International Passenger Survey by ONS 2011 and 2016

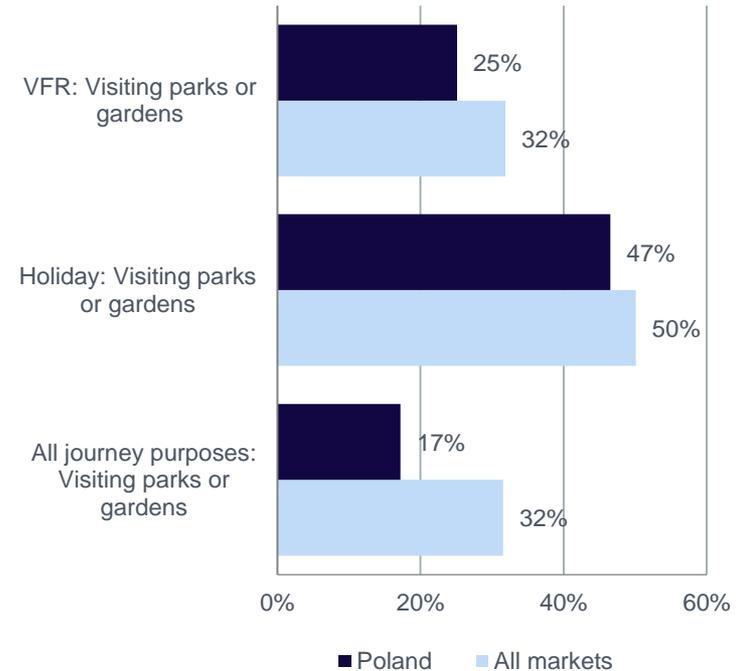


## 1.4 Inbound activities

Propensity to go for a walk or cycle



Propensity to visit a park or garden

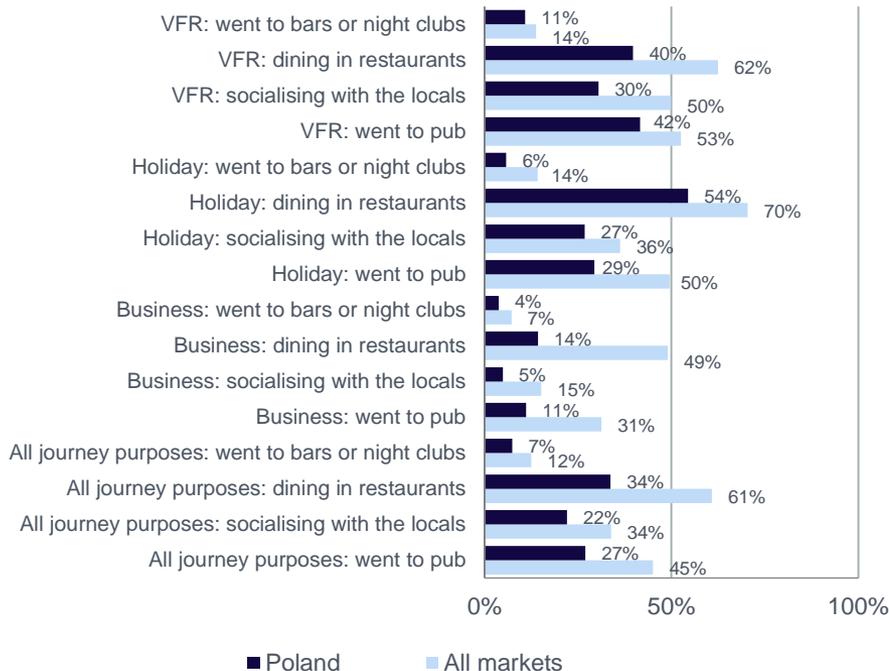


Source: International Passenger Survey by ONS 2007, 2010 and 2016

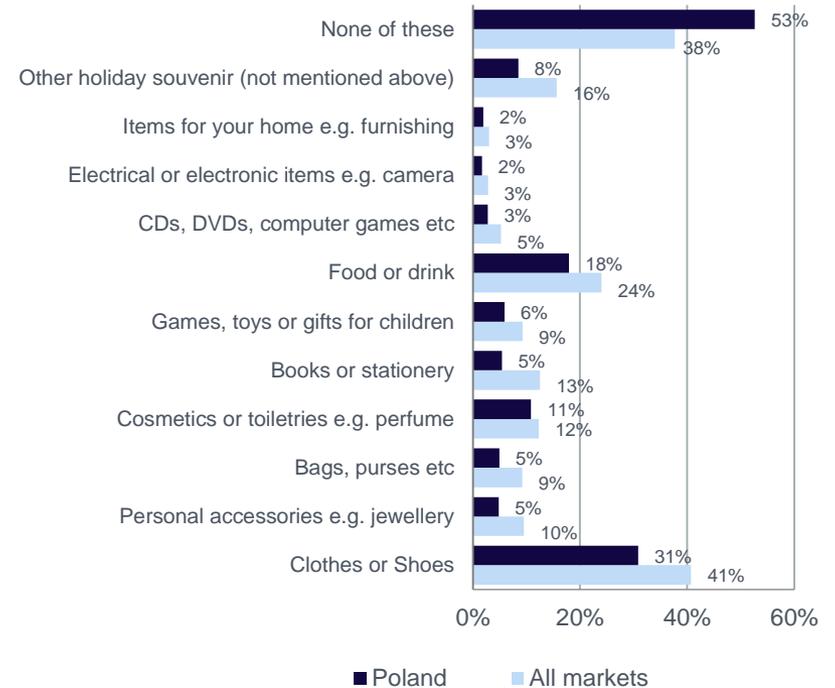


## 1.4 Inbound activities

Propensity to go to restaurants, pubs, night clubs and socialise with locals



Propensity to purchase selected items (%)



Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2013



# Chapter 2: Understanding the market





## 2. Understanding the market

### Chapter summary

- Poland has a population of about 38 million.
- The Polish outbound market is continuously growing and travel is becoming more and more important. 57% of Polish residents aged 15 and over took at least one private trip for tourism in 2016.
- 46% of Polish people state that they used online commercial services to make their holiday booking.
- Friends, family and colleagues are the most influential source when making a travel decision, followed by information online and personal experience.
- Views of Britain tend to be positive: Polish respondents ranked the UK second out of 50 countries in 2017. They rate Britain highly for its contemporary culture, sports and vibrant cities. Music and films are the cultural products or services most associated with Britain, closely followed by sports and museums.
- Activities that appeal to potential Polish visitors include a visit to Buckingham Palace and spotting wildlife in the Scottish Highlands.



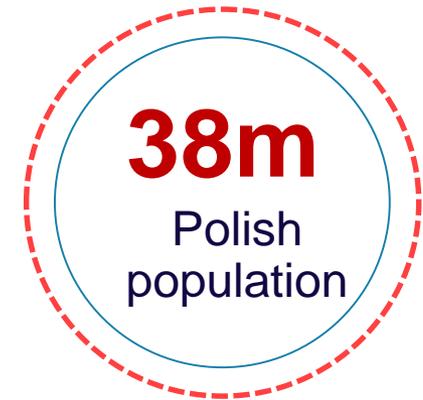
Source: Oxford Economics, GfK Anholt Nation Brands Index 2013 and 2017, Flash Eurobarometer 432 by EC 2016, "Tourism in 2016" by Polish Central Statistics Office GUS



## 2.1 Structural drivers

### Demographics & society

- Population of about 38 million.
- Poland is a republic.
- There are 16 provinces: Lower Silesia, Kuyavia-Pomerania, Lodz, Lublin, Lubusz, Lesser Poland, Masovia, Opole, Subcarpathia, Podlaskie, Pomerania, Silesia, Holy Cross (Swietokrzyskie), Warmia-Masuria, Greater Poland, and West Pomerania.
- The population tends to be concentrated most in the southern area around Krakow and the central area around Warsaw and Lodz as well as in the northern coastal city of Gdansk.
- The official language is Polish. English is the most common foreign language taught in school.
- Polish employees receive usually between 20 and 26 days of annual leave (depending on the length of their employment).



Source: Oxford Economics, CIA World Factbook 2018, EURES 2018, Eurostat 2017



## 2.1 Structural drivers: population and economic indicators

### Population dynamics

Measure	2017 estimate
Total population	37,964,000
Net migrant rate (migrants per 1,000 population)	-0.4
Average annual rate of population change in 2017 - 2022	-0.1%

### Economic indicators

Indicator	2017	2018	2019
Real GDP	4.5%	4.2%	3.3%
Consumer spending	4.8%	4.0%	3.1%
Unemployment rate	7.3%	6.9%	6.7%
Wage index	5.6%	5.3%	5.3%
Consumer prices	2.0%	2.5%	2.4%

Source: Oxford Economics, CIA World Factbook 2018



## 2.1 Structural drivers: general market overview

### General market conditions

- Poland was Britain's 8<sup>th</sup> largest source market in terms of visits and 16<sup>th</sup> most valuable for visitor spending in 2016.
- The Polish economy is forecasted to remain strong in 2018 with real GDP growth expected to stand at 4.2%. Consumer spending is expected to remain strong.
- The country has a population of about 38 million with a median age of 41.
- Most people in Poland are well-educated; however, GDP per capita in purchasing power parity terms is around US\$26,350, lower than the Eurozone average.
- Exchange rate: comparing the monthly average for March 2018 and March 2016, when GBP was very strong vs. PLN, the cost of GBP has become 13% more affordable for Polish visitors to the UK.

### Key demographic and economic data

Measure (2017 data)	Poland	Eurozone
Population (m)	38.0	337.7
GDP per capita PPP (US\$)	26,353	38,994
Annual average GDP growth over past decade (%)	3.3	0.6
Annual average GDP growth in 2017 (%)	4.5	2.5

Source: Oxford Economics, CIA World Factbook 2018



## 2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in PLN)



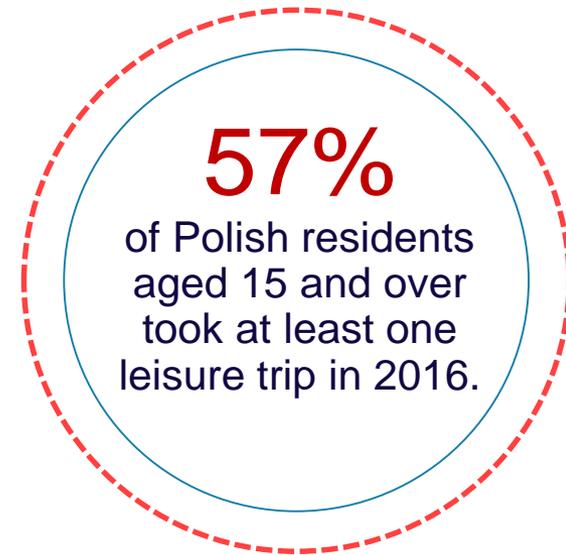
Please find the most up-to-date exchange rate trend based on monthly averages at [visitbritain.org/visitor-economy-facts](https://www.visitbritain.org/visitor-economy-facts).

Source: Bank of England



## 2.2 Consumer trends

- In 2016, 57% of Polish residents aged 15 or over took at least one leisure trip, i.e. 18.4 million people participated (5% more than in 2015). The volume of trips taken increased by 8%. Domestic trips dominated the picture with about 44 million of trips taken within Poland – 61% of these were short trips (2-4 days). Expenditure by Polish travellers also increased for both domestic and trips abroad in 2016.
- Nature, city trips and visiting friends and/or family are the most important reasons for Poles to go on a holiday, just ahead of sun and beach.
- Asked for reasons which would make them come back to a holiday destination, almost three in five value the “natural features”. The general level of prices and the quality of accommodation were also key reasons for many Polish respondents.
- Many Polish consumers are comfortable buying goods or services online. However, while their share is growing, it remains below the European average in 2017.



Sources: *"Tourism in 2016"* by Polish Central Statistics Office GUS, *Flash Eurobarometer 432* by EC 2016, *Eurostat 2017*



## 2.2 Consumer trends: overall travel trends

### Travel trends

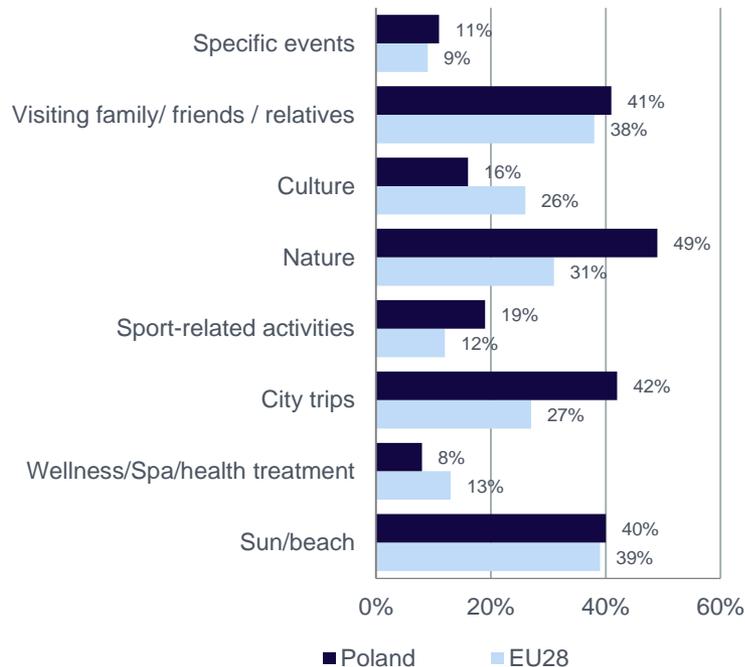
- An increasing proportion of the Polish resident population aged 15+ participates in tourism with at least one leisure trip per year. In 2016 18.4 million took a trip, which represents 5% growth on 2015.
- The overall volume of trips taken also grew by 8% year-on-year in 2016. Domestic trips dominated the picture with about 44 million of trips taken within Poland – 61% of these were short trips of two to four day duration. Outbound trips have a much higher tendency to be longer trips of 5 days and over.
- Most of the domestic trips were taken to visit friends and/or relatives, followed by trips for holidays, leisure and recreation.
- Expenditure on trips by Polish residents aged 15+ also increased, both for domestic and outbound trips amounting to just under 60bn PLN in 2016 (a 11% increase on 2015) – around £11bn at 2016 average exchange rates.
- The average expenditure per person on a domestic trip of two to four days was 287 PLN (c.£54) and 884 PLN (c.£166) for trips of five days and over. For an outbound trip the average Polish traveller spent 1,203 PLN (c.£225) on a short trip of two to four days and 2,484 PLN (c.£465) on a longer one of five days or more. Most of the Polish tourism expenditure goes to transport followed by accommodation and food and drink.
- Many Polish consumers are comfortable buying goods or services online. In 2017, 45% of Poles aged between 16 and 74 had done so during the past 12 months. While this proportion is below the EU average (57%), the share of those ordering online has grown consistently over the past decade.
- Polish travellers were most likely to travel with their partner or spouse (34%), followed by travelling with children under 18 (31%) or travelling with friends (23%).

Source: "Tourism in 2016" by Polish Central Statistics Office GUS, Eurostat 2017, Flash Eurobarometer 432 by EC 2016

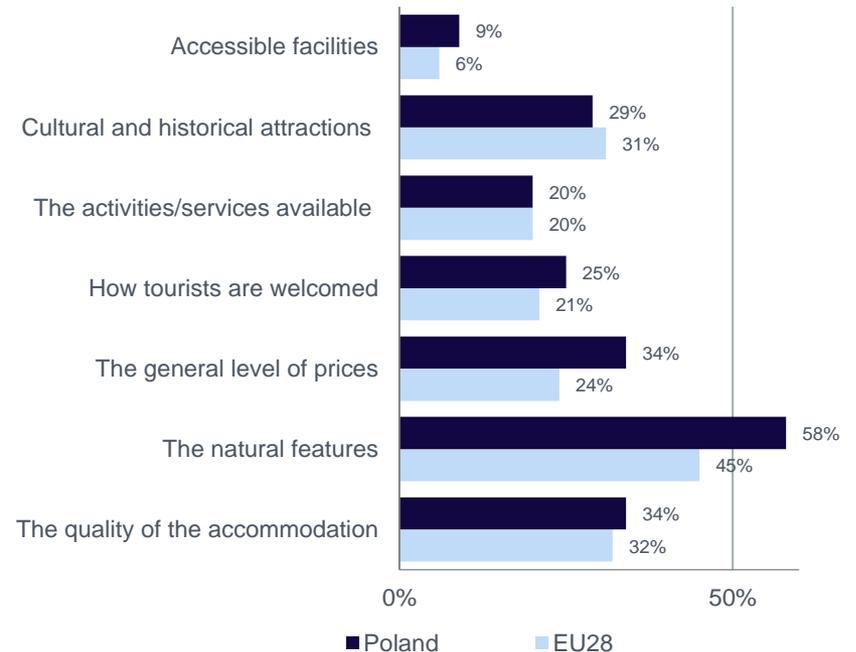


## 2.2 Consumer trends: reasons for holidays

Main reasons for going on holiday (%)



Reasons to return to the same destination for a holiday



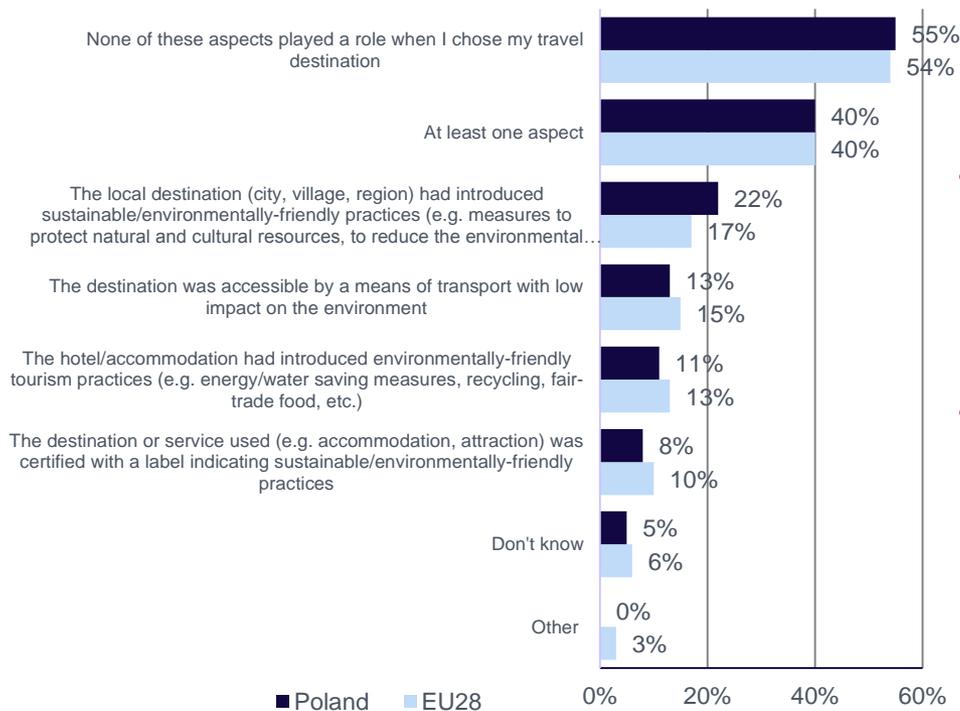
- Amongst the main reasons for going on a holiday for Polish travellers are: nature, city trips, visiting family/friends/relatives and sun/beach (all above European average). Sport-related activities were above the average stated by almost one in five.
- Asked for reasons which would make them come back, almost three in five value the “natural features”. The general level of prices and the quality of accommodation were key reasons for about one in three Polish respondents.

Source: Flash Eurobarometer 432 by EC 2016: What were your main reasons for going on holiday in 2015? Firstly? And then? and Which of the following would make you go back to the same place for a holiday? Firstly? And then?



## 2.2 Consumer trends: motivation and attitudes to holidays

### Role of sustainable/environmentally-friendly aspects when choosing travel destinations



### Motivation and attitudes to holidays

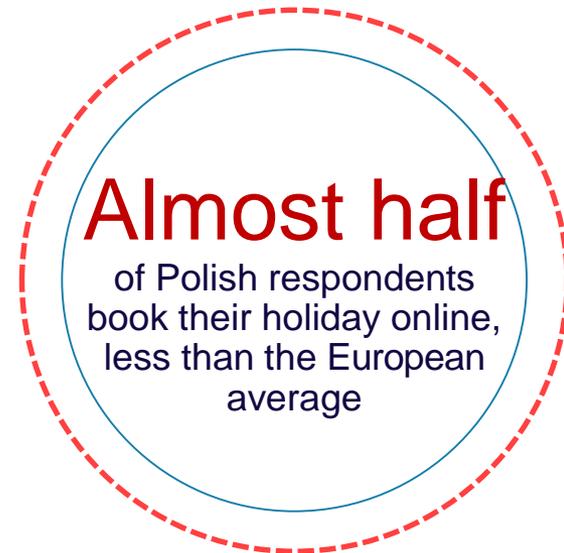
- When asked about the impact of the economic situation on their holiday plans, almost half of Polish travellers said that they were unlikely to amend their holiday plans (46%) and 13% said that they would still go on holiday but were likely to spend less. These trends are broadly in line with the European average.
- When choosing a travel destination, Polish respondents were also broadly in line with the overall European average when it came to the influence of environmental or sustainability factors. Whilst 55% said none of these factors stated had any influence on their decision, two out of five said that at least one aspect played a role.
- The environmental factor most likely to influence the destination decision was whether “The local destination (city, village, region) had introduced sustainable/ environmentally-friendly practices (e.g. measures to protect natural and cultural resources, to reduce the environmental impact of tourism, or to involve the local population in tourist services and the benefits of tourism)”.

Sources: Flash Eurobarometer 432 by EC 2016: Were any of the following aspects relevant for you when you chose the destination(s) to visit during your main holiday in 2015? (max. 3 answers)



## 2.3 Booking and planning

- Almost half of Polish use some type of online channel to book their holiday, a little below the European average.
- Nearly one in four booked their holiday over the phone (above the European average). 10% booked their holiday face-to-face over the counter at a travel agency and 8% over the counter with a transportation company.
- About one in five booked through someone they know and 17% said they did not need to book anything which might include those who planned to stay with family and/or friends in the destination.

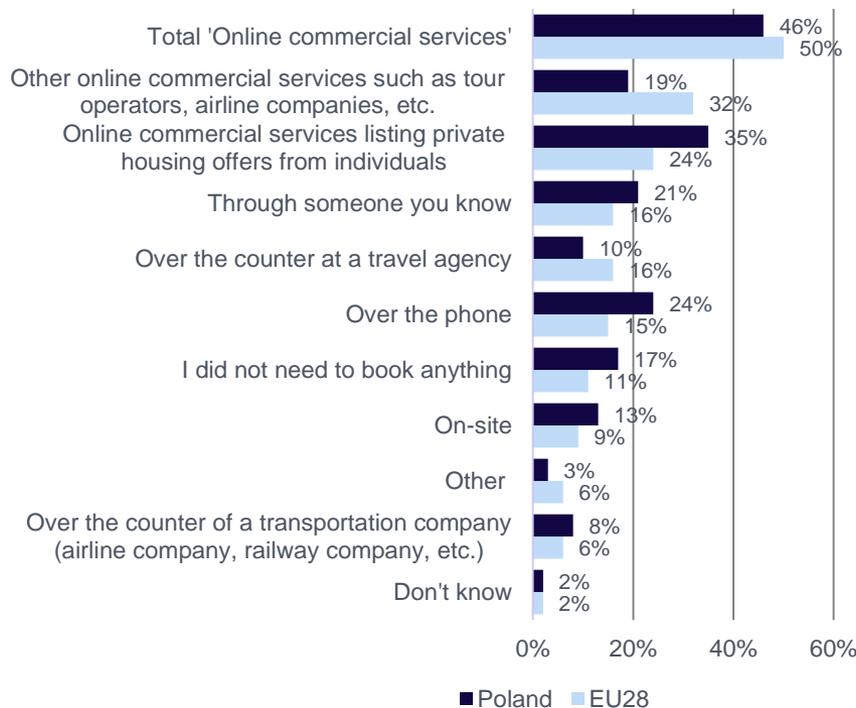


Source: Flash Eurobarometer 432 by EC 2016



## 2.3 Booking and planning: booking channels

### Methods used to book a holiday



- Almost half of Polish respondents used some sort of online channel to make their holiday booking, slightly below the European average (50%). More than one in three used online channels listing private housing offers from individuals.
- Nearly one in four booked their holiday over the phone (above the European average). 10% booked their holiday face-to-face over the counter at a travel agency and 8% over the counter with a transportation company.
- About one in five booked through someone they know and 17% stated they did not need to book anything which might include those staying with friends and/or relatives in the destination.

Source: Flash Eurobarometer 432 by EC 2016: Did you book your holiday in 2015 by any of the following methods? (multiple answers possible)



## 2.4 Reaching the consumer

- The most influential source for travel decision-making for Polish travellers are friends, family and colleagues followed by websites.
- The influence of social media pages, newspapers, TV and radio is slightly above the European average in the Polish market.
- Personal experience is key for almost one in three Polish travellers when making their travel decisions and more than a third rely on websites collecting and presenting comments, reviews and ratings by other travellers.
- TV reaches about four in five Polish people on a weekly basis, radio more than two in five and print has a weekly reach of about one in three in Poland.
- 76% of the Polish population have access to the Internet (according to Eurostat).

**Friends, family  
& colleagues**

#1 Influence for the  
destination choice  
of Polish travellers

Source: Flash Eurobarometer 432 by EC 2016, Reuters Institute/ University of Oxford Digital News Report Poland, Eurostat 2017



## 2.4 Reaching the consumer: broadcast media, radio and papers



### Broadcast media

- TV reaches about four in five Poles on a weekly basis.
- National public TV channels include: TVP 1, TVP 2 and TVP Info.
- Commercial TV landscape includes: Polsat (most-watched general interest station), TVN, TVN 24, incl. several lifestyle channels and travel programmes such as Travel Channel or Food Network.



### Radio

- Radio reaches more than two in five Poles on a weekly basis.
- The most popular radio operators include: Polish Radio (operates 5 national networks and many regional stations), TheNews.pl, FMF FM and Radio Zet.



### Newspapers/ Magazines

- There are more than 300 newspapers in Poland; most are local or regional.
- Some of the most-read papers includes Fakt, Gazeta Wyborcza, Rzeczpospolita, Super Express, Dziennik Gazeta Prawna. Weekly newspapers include: Polityka, Wprost and Newsweek Polska. There are also some in English-language: The Warsaw Voice, Warsaw Business Journal and New Poland Express.

- Print media reaches about a third of Poles on a weekly basis.

### Online media/Social media



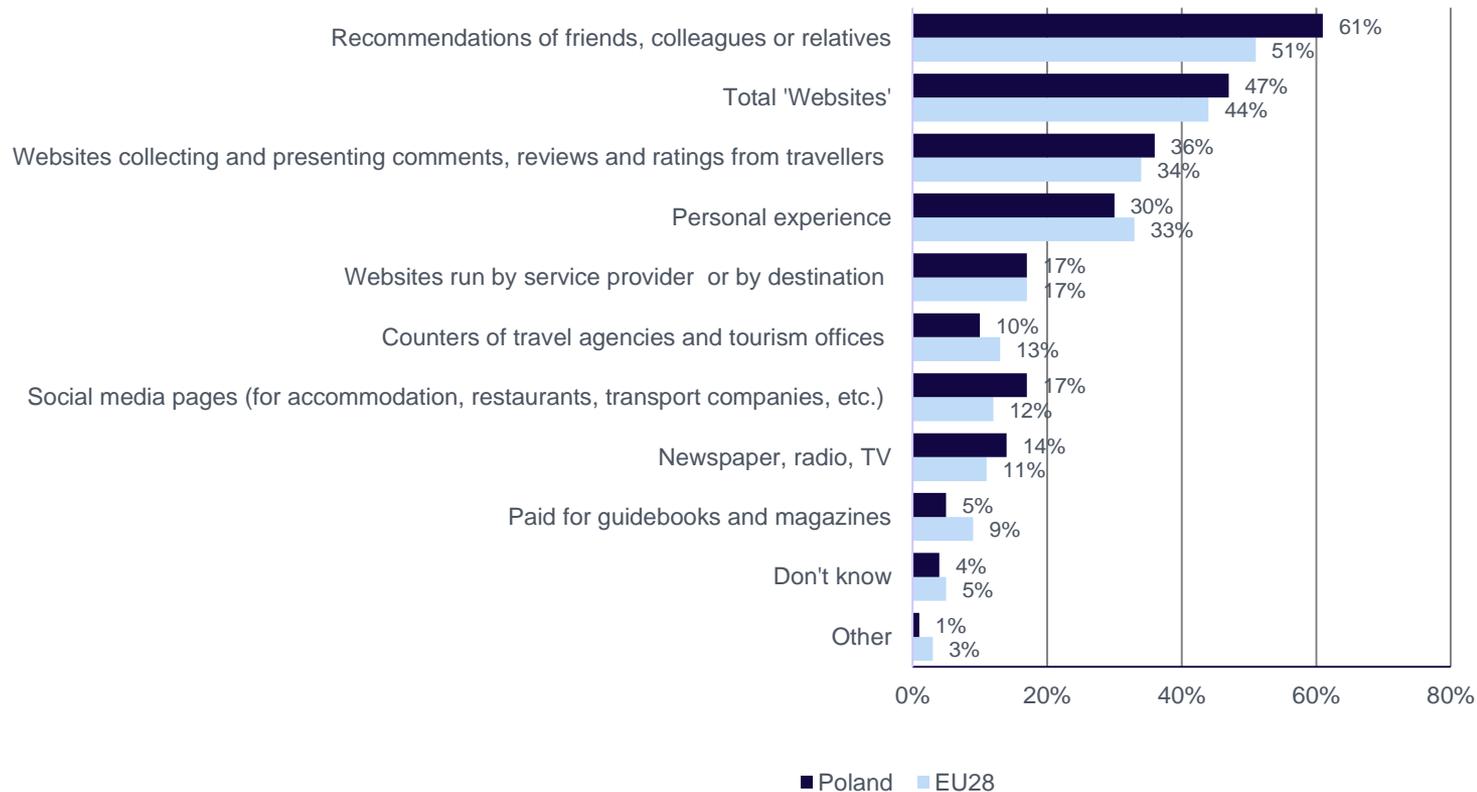
- 76% of Poles have access to the Internet.
- Many media outlets have digital versions. Gazeta Wyborcza reported 100,000 active digital-only subscribers at the end of 2016.
- In recent years online outlets like Onet and Wirtualna Polska have become the main source of news and increased their market share. Some have also launched digital TV channels.
- Many Polish people rely more on computer and portals than smartphones on average than other Europeans which might explain why new mobile messaging apps are not as popular than in many other countries. Poles have an above-average use of ad-blockers.
- 48% of Poles used social networks on the Internet in 2017 (below EU average, but growing in recent years). Facebook and YouTube are the most used social media channels in Poland, then Twitter. About half of Polish people said they trust social media and search engines as a source for general news and information.

Source: *BBC Poland profile – Media*, *Reuters Institute/ University of Oxford Digital News Report Poland 2016 and 2017*, *Eurostat 2017*, *The 2018 Edelman Trust Barometer/Foresight Factory*,



## 2.4 Reaching the consumer: influences

### Influences on decision-making about travel plans



Source: Flash Eurobarometer 432 by EC 2016: Which of the following information sources do you think are most important when you make a decision about your travel plans? (max. 3 answers per respondent)



## 2.5 Perceptions of Britain

- The Polish rate Britain highly for culture in general, contemporary culture and sports, but less for welcome and scenic natural beauty; Britain was rated 23<sup>rd</sup> and 40<sup>th</sup> out of fifty nations respectively on these latter two attributes in 2017.
- Music, films, museums and sports are the cultural products or services most strongly associated with Britain among Polish people.
- A trip to Britain would be expected to be 'Fascinating' and 'Educational' by Poles.
- Activities that appeal to potential Polish visitors include a visit to Buckingham Palace and spotting wildlife in the Scottish Highlands.



Source: GfK Anholt Nation Brands Index 2013 and 2017



## 2.5 Perceptions of Britain

Britain's ranking (out of 50 nations)

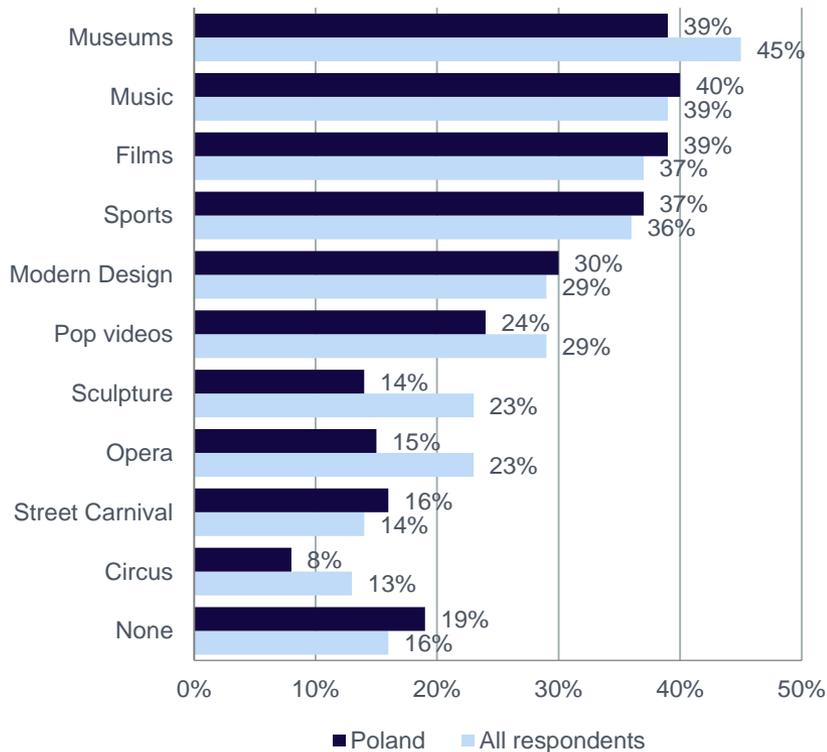
Measure	Polish respondents	All respondents
Overall Nation Brand	2	3
Culture (overall)	2	5
The country has a rich cultural heritage	9	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	3	3
The country excels at sports	3	4
People (overall)	17	6
If I visited the country, the people would make me feel welcome	23	13
Tourism (overall)	9	3
Would like to visit the country if money was no object	14	6
The country is rich in natural beauty	40	24
The country is rich in historic buildings and monuments	8	5
The country has a vibrant city life and urban attractions	5	4

Source: GfK Anholt Nation Brands Index 2017

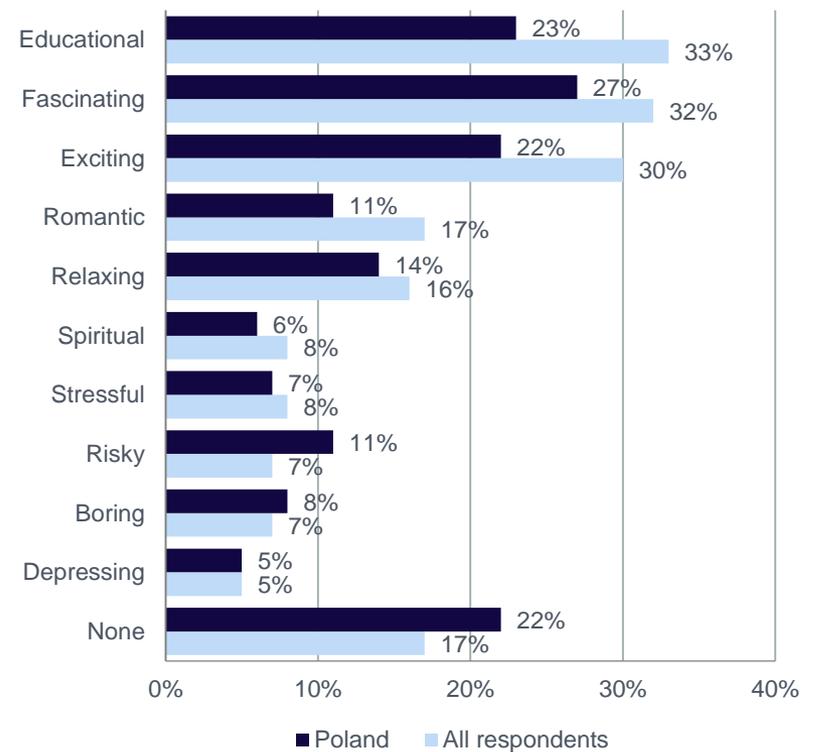


## 2.5 Perceptions of Britain

### Cultural associations



### Adjectives describing a potential trip to Britain

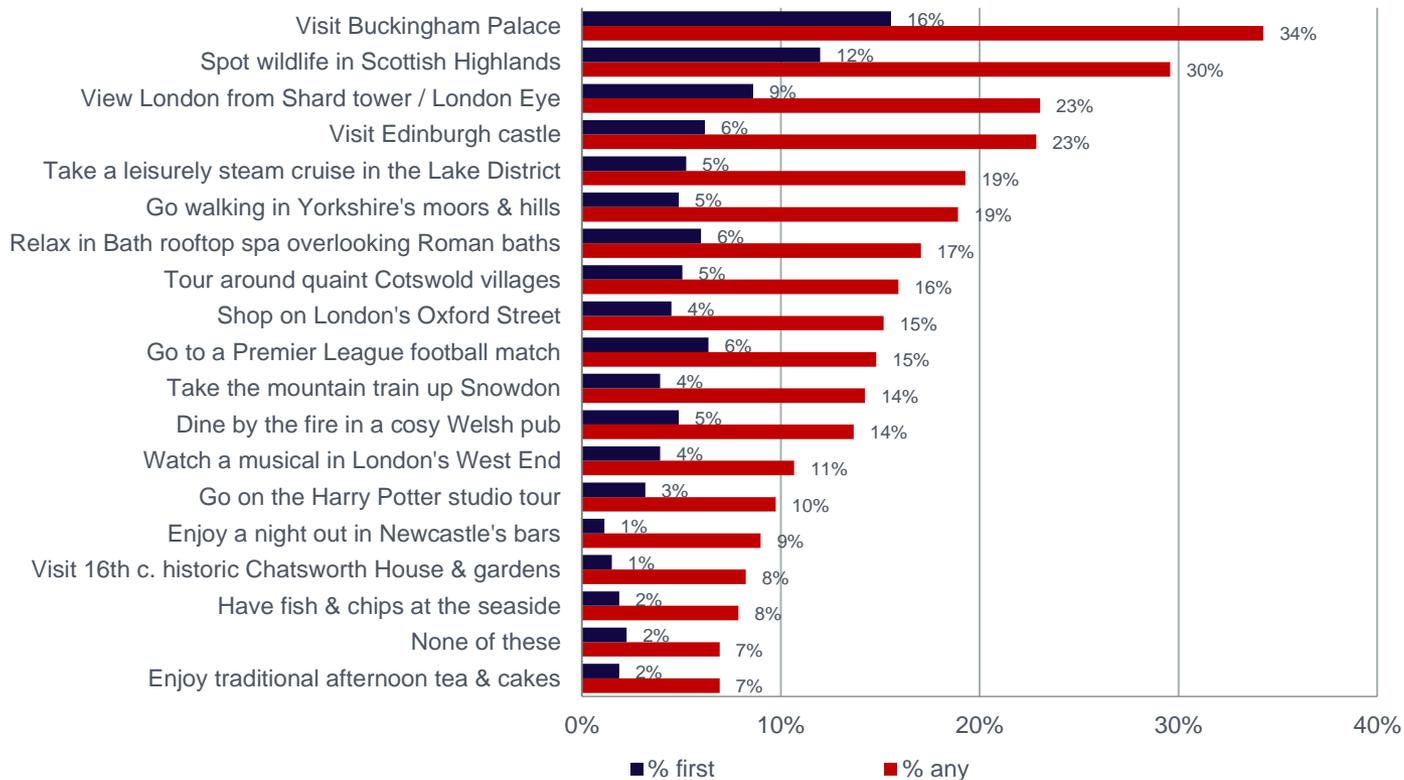


Source: GfK Anholt Nation Brands Index 2017



## 2.5 Perceptions of Britain

### Sought-after Britain activities



Source: GfK Anholt Nation Brands Index 2013; If you went on a holiday/vacation to Britain which of the following activities would you most like to do? Please choose a first, second and third choice



# Chapter 3: Access and travel trade

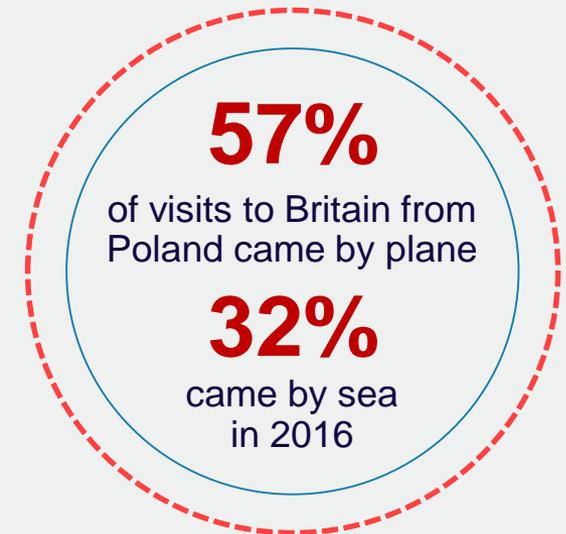




### 3. Access and travel trade

- Poland and Britain are well connected. 57% of visits to Britain from Poland came by plane in 2016, roughly a third by ferry and just over one in ten through the Channel Tunnel.
- Annual seat capacity has shown strong growth after a decline in financial crisis years. Whilst 55% of annual seat capacity came into London in 2017, the remaining proportion flew into regional airports which helped support the good regional spread of Polish visitors.
- A large proportion of Polish visitors coming via ferry or through the Tunnel are driving a lorry to/from Britain to deliver and/or pick up goods.
- The Polish tourism trade landscape is diverse and dominated by many small businesses and the source market is becoming increasingly important with growth of Polish outbound travel. A few key players hold the biggest market share of the Polish travel market but Britain is often featured as a more niche destination by smaller players.

Source: Apex Rdc 2017 non-stop flights only





## 3.1 Access: key facts

- Just under three in five Polish visits to the UK were made by plane in 2016. It is a short non-stop flight: usually between 2.5-3.5 hrs flight time, depending on the departure and arrival airports.
- Annual seat capacity has shown strong growth after a decline in financial crisis years. Whilst 55% of annual seat capacity came into London in 2017, the remaining proportion flew into regional airports which helped support the good regional spread of Polish visitors.
- Polish visitors departing Britain by air pay £13 in Air Passenger Duty.
- Roughly a third of Polish visits came by ferry and just over one in ten through the Channel Tunnel in 2016. 681,000 visits of the annual 1.9 million visits from Poland are those who drive a lorry to/from, Britain often delivering/picking up goods, making up the majority of those visits who come by ferry or through the Tunnel.

Source: International Passenger Survey by ONS, Apex RdC 2017, non-stop flights only

◀ Just under 3-in-5 Polish visits are made by plane and about 1-in-3 by ferry

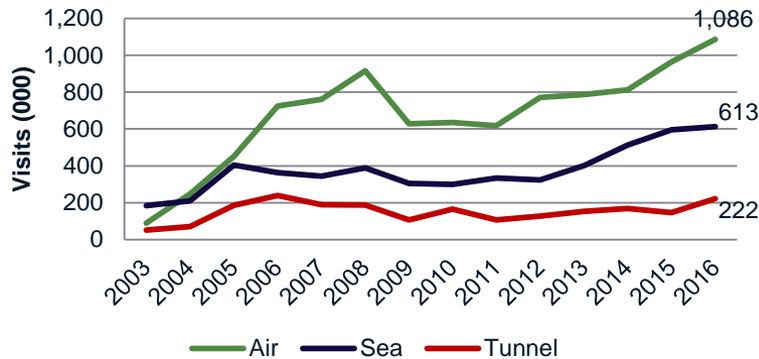
### Access to Britain

Measure	2017
Weekly aircraft departures	451
Weekly aircraft seat capacity	84,141
Airports with direct routes in Poland	13
Airports with direct routes in Britain	20

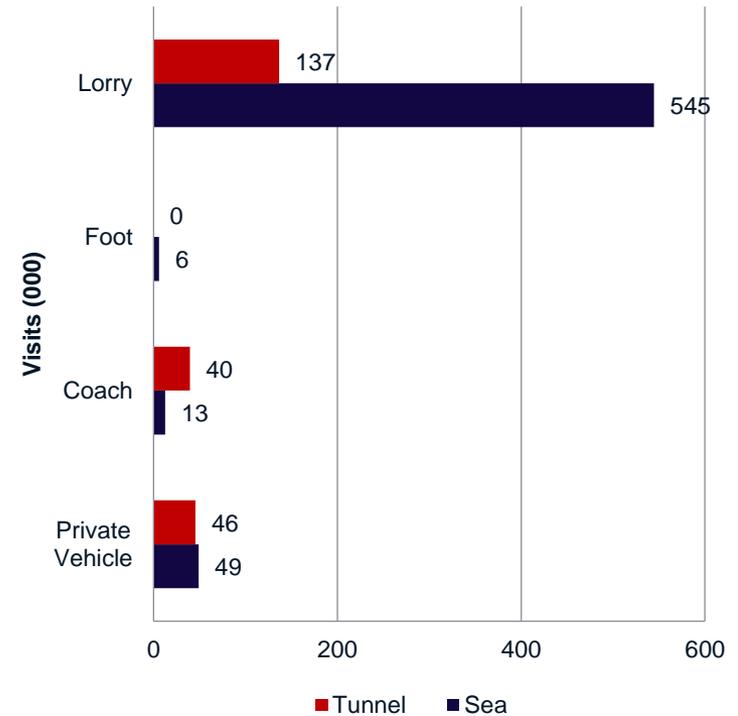


## 3.1 Access: mode of transport and capacity

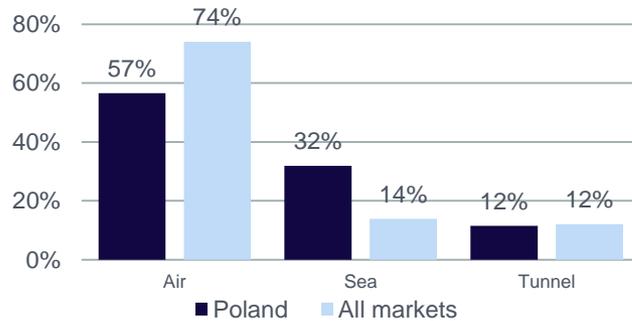
Visits by mode of transport



Sea and tunnel travel (000s) in 2016



Annual share by mode (2016)

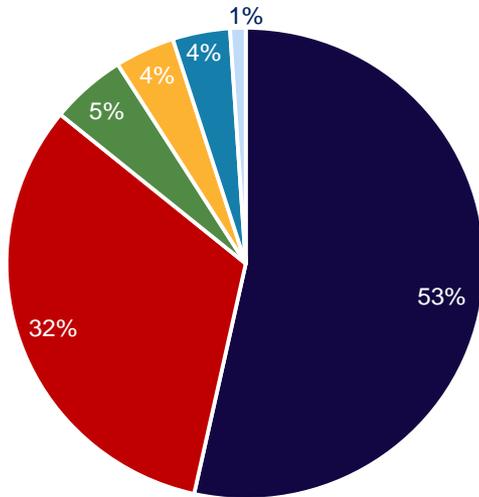


Source: International Passenger Survey by ONS



### 3.1 Access: capacity

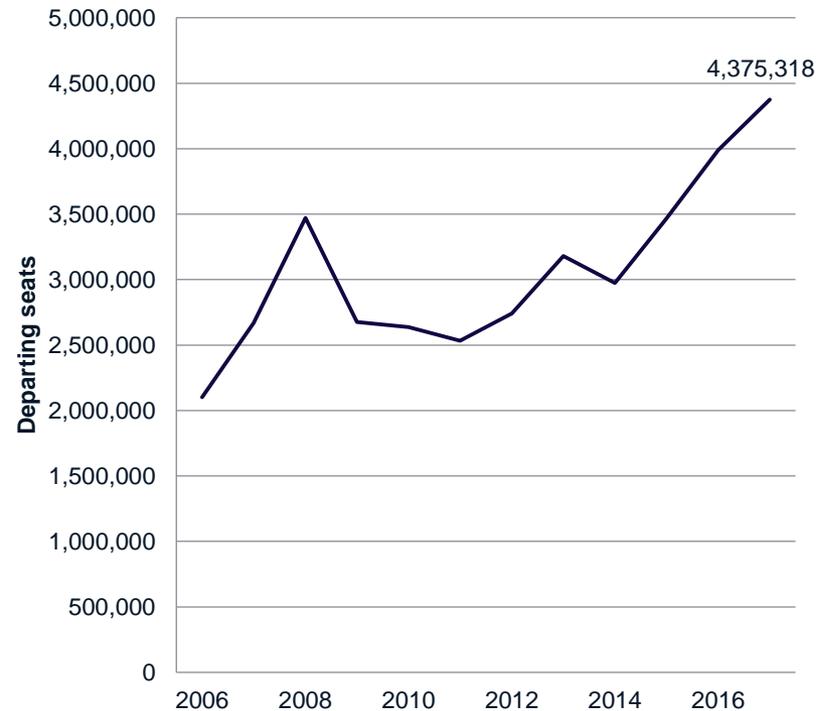
Airline seat capacity by carrier (2017)



- Ryanair
- Wizz Air
- easyJet
- LOT Polish Airlines
- British Airways
- Other\*

Source: Apex Rdc: non-stop flights only

Annual airline seat capacity trends

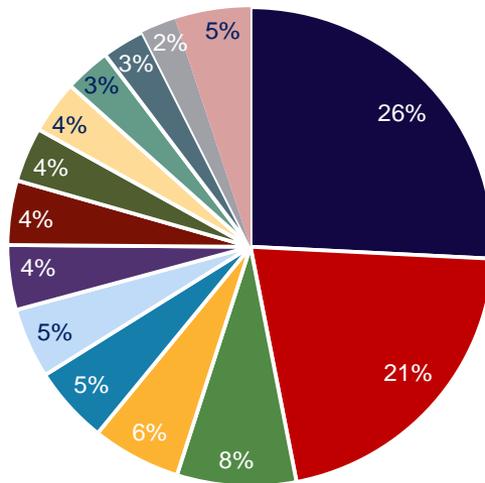


\*Other groups all airlines with less than 2% annual seat share: Jet2, Norwegian Air International, Thomas Cook Airlines, Thomson Airways

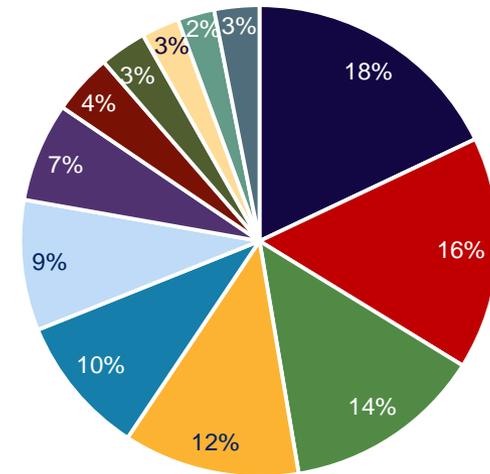


### 3.1 Access: capacity

Destination airport annual seat capacity



Origin airport annual seat capacity



- London - Stansted
- London - Luton
- London - Heathrow
- Liverpool John Lennon
- Bristol
- Doncaster Sheffield
- Manchester International
- Birmingham International
- Edinburgh
- East Midlands
- Glasgow International
- Belfast International
- Leeds/Bradford
- Other\*

- Krakow-Balice - J. Paul II Balice International
- Warsaw - Frederic Chopin
- Gdansk Lech Walesa
- Warsaw - Modlin
- Wroclaw Copernicus
- Katowice International
- Poznan - Lawica
- Rzeszow - Jasionka
- Lublin
- Bydgoszcz
- Szczecin - Goleniow
- Other\*\*

Source: Apex Rdc 2017: non-stop flights only

\*Airports with less than 2% annual seat share grouped in other: London-Gatwick, Newcastle, Aberdeen, Bournemouth International, Glasgow Prestwick, Exeter International and Cardiff

\*\*Airports with less than 2% annual seat share grouped in other: Lodz Lublinek and Olsztyn-Mazury



## 3.2 Travel trade: general overview

- The Polish trade structure is fragmented with many small businesses making up the bulk of the sector.
- Tour operators are spread throughout Poland but there is a concentration in larger cities such as Warsaw, Poznan, Wroclaw, Opole, Krakow and Gdansk.
- The large tour operators tend to research their main programmes between February and April.
- Britain is a destination which is often featured among the smaller niche operators and by a few of the larger tour operators.

**The Polish trade structure is fragmented with many small businesses.**



## 3.2 Travel trade: Polish holidays

### National public holidays in 2018

Date	National Holiday
1 January	New Year's Day
6 January	Epiphany
1-2 April	Easter
1 May	Labour Day
3 May	Constitution Day
20 May	Pentecost
31 May	Corpus Christi
15 August	Assumption Day
1 November	All Saints Day
11 November	Independence Day
25 December	Christmas Day
26 December	St. Stephen's Day



## 3.2 Travel trade: practical information

### General practical information:

- Business hours are typically 08:00/09:00 – 16:00/17:00. There is usually a half an hour lunchbreak.
- A firm handshake is the most traditional form of greeting, it is quite common for women to have their hands kissed. It is better to start using a person's title and surname until invited to use their first name. Please avoid placing hands in pockets as it might be regarded as disrespectful and rude.
- Please avoid scheduling meetings coinciding with a public holiday and check if there is a large trade fair happening in the city you are visiting as it may be difficult to find accommodation.
- Dress code: Business dress tends to be smart casual conservative, in larger companies often suits and tie for men.
- Business Meeting Etiquette: Appointments are mandatory and should be made in advance and reconfirmed a few days before. Please phone if you get delayed and try not to cancel a meeting at short notice. Punctuality is very important.
- Communication is straightforward and to the point. The culture in Polish companies tends to be hierarchical and negotiations tend to be held with a direct and forthright approach. Business presentations are most successful when they are clear, concise and easily understood and kept strictly to business rather than a Western-style sales pitch.
- Relationships in Poland are important. Try to visit your contacts at least once a year and keep in regular contact with them even when you are back in Britain.
- Try to provide your printed material in advance and available in Polish wherever possible, and English.



## 3.2 Travel trade: sales calls

### Sales calls

The Polish trade structure is fragmented. Tour operators are spread throughout Poland but there is a concentration in larger cities such as Warsaw, Poznan, Wroclaw, Opole, Krakow and Gdansk. Therefore, before you embark on a sales visit to Poland, VisitBritain recommends that you take the following steps:

- Provide the operators you are visiting with a comprehensive information pack about your products, ideally in advance. Make information available in English and Polish wherever possible. It is often appreciated.
- If you are driving between Polish towns to visit your contacts allow for plenty of time as road conditions might require more time than driving the same distance in Britain, particularly in rural areas. Local airports also operate a comprehensive network of domestic routes and most cities are well connected via rail.
- On your return to Britain ensure that you follow up quickly and renew contact regularly.
- The large tour operators research their main programmes between February and April. These programmes are often costed between May and July and launched in the period between September and November. Smaller specialist tour operators tend to research their programmes later in August/September for a launch in January/March. Off-season/city break operators tend to research their winter programmes in March/April and launch them in June/July/August.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Britain players attend the VisitBritain's ExploreGB workshop, Best of Britain, BIM Marketplace and VisitScotland Expo. Please contact [VisitBritain London](#) for details of those attending. Some operators also visit World Travel Market but register with the organisers independently.



## 3.2 Travel trade: hospitality etiquette

### Hospitality etiquette

If there is the opportunity it is definitely a good idea to take your Polish business partner out for a meal or coffee – either to build up a relationship or to thank for business given in the past. Here are some practical tips to help you plan this:

- When choosing a restaurant ensure beforehand that credit cards are accepted or bring enough cash. Many Polish restaurants do not take credit cards.
- Arrive on time and if possible, before the invite, as punctuality indicates reliability.
- If you order water you will be asked if you want still or sparkling mineral water.
- Service charge and VAT are included in the price, but ‘rounding up’ the amount as tip is very common. If you are paying for more than one person you might go higher. A rule of thumb is to add 5-10%.
- If you are not paying for everyone, then splitting a bill is quite common in Poland.



## 3.3 Caring for the consumer

### Caring for the consumer

- Whilst Polish travellers would usually not expect their British hosts to speak Polish as many of them have good command of English (especially the younger generations), signage and information in Polish helps make them feel much more welcome.
- Polish travellers are often spontaneous and may ask for some recommendations once they are on location.
- Communication tends to be direct and to the point.
- Polish travellers think that value for money is really important. As the level of prices for accommodation tends to be higher in Britain than in Poland, it raises expectations for very good standard and service. Polish holidaymakers value spacious rooms – often they think of British rooms as quite small.
- Many prefer beds with duvets rather than tucked-in sheets with blankets and central heating. They often appreciate that British hotels offer tea making facilities in hotel rooms. Individual travellers often book B&Bs, hostels and mid-star range hotels; for tour groups often 4-5 star hotels are booked.

Source: International Passenger Survey by ONS

### Language basics

English	Polish
Please	Proszę
Thank you	Dziękuję
Yes	Tak
No	Nie
Sorry! (apology)	Przepraszam
Excuse me!	Przepraszam
Sorry, I do not speak Polish.	Przepraszam, nie mówię po polsku.



## 3.3 Caring for the Consumer

### Caring for the Consumer:

- Whilst perceptions of British food tend to be below average many Polish travellers are keen to try local food and produce. British pubs are generally loved and pub food usually goes down well.
- Poles often eat bread, bread rolls with a good selection of jam, cold cuts, cheese/cottage cheese or eggs for breakfast. Cooked breakfast is not very common in Poland.
- Lunch tends to be the most substantial meal of the day, usually eaten sometime between 1pm and 5pm, either at home or at the workplace. You could say it is a dinner at lunchtime but many in urban areas are now making dinner their main meal of the day, especially when both parents in a family work.
- The evening meal is supper/dinner. The time and menu vary greatly: sometimes it can be nearly as substantial as lunch but more often it is just sliced meats with some salad or even lighter, a pastry and a glass of tea. Supper is usually eaten between 6pm and 7pm.
- Poles are passionate tea drinkers but seldom drink it with milk, instead, a slice of lemon is added plus sugar to taste. Coffee is another popular drink and they often like it strong.
- These days drinking habits of Poles are changing; increasingly Poles are turning to beer and wine instead of vodka. In spite of the stereotypes, Poles are often not large consumers of alcohol, and excessive drinking is frowned upon.
- Propensity to use a credit card tends to be lower than average among Polish visitors, especially among business visitors.



## 3.3 Caring for the consumer: Polish language tips

### Language tips for arrival and departure

English	Polish
Hello	Cześć
My name is...	Nazywam się...
Welcome to Britain	Witamy w Wielkiej Brytanii
Pleased to meet you!	Miło Pana/Panią poznać
How are you?	Jak się masz?
Enjoy your visit!	Miłego pobytu!
Goodbye	Do widzenia
Did you enjoy your visit?	Jak minął Pani/Panu pobyt?
Have a safe journey home!	Bezpiecznej podróży!
Hope to see you again soon!	Do zobaczenie wkrótce!



## 3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search ([visitbritain.org/opportunities](https://visitbritain.org/opportunities)) or trade website ([trade.visitbritain.com](https://trade.visitbritain.com)) or contact the B2B events team (Email: [events@visitbritain.org](mailto:events@visitbritain.org)) or campaign partnerships team (Email: [partnerships@visitbritain.org](mailto:partnerships@visitbritain.org)) or trade support team (Email: [tradesupport@visitbritain.org](mailto:tradesupport@visitbritain.org))



## 3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS  
([visitbritain.org/latest-monthly-data](https://www.visitbritain.org/latest-monthly-data)  
[visitbritain.org/latest-quarterly-data-uk-overall](https://www.visitbritain.org/latest-quarterly-data-uk-overall)  
[visitbritain.org/latest-quarterly-data-area](https://www.visitbritain.org/latest-quarterly-data-area))
- Inbound Tourism Trends by Market  
[visitbritain.org/inbound-tourism-trends](https://www.visitbritain.org/inbound-tourism-trends)
- Sector-specific research  
[visitbritain.org/sector-specific-research](https://www.visitbritain.org/sector-specific-research)
- 2018 Inbound Tourism Forecast  
[visitbritain.org/forecast](https://www.visitbritain.org/forecast)
- Britain's competitiveness  
[visitbritain.org/britains-competitiveness](https://www.visitbritain.org/britains-competitiveness)

We are here to support you and look forward to working with you.

To find out more about the Polish or other inbound markets browse our markets & segments pages or ([visitbritain.org/markets-segments](https://www.visitbritain.org/markets-segments)) our inbound research & insights or ([visitbritain.org/inbound-research-insights](https://www.visitbritain.org/inbound-research-insights)) contact us directly (Email: [research@visitbritain.org](mailto:research@visitbritain.org))



## 3.5 Useful research resources

We have dedicated research and insights available which include:

- Britain's image overseas  
<https://www.visitbritain.org/britain%E2%80%99s-image-overseas>
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more  
[visitbritain.org/visitor-characteristics-and-behaviour](https://www.visitbritain.org/visitor-characteristics-and-behaviour)

We are here to support you and look forward to working with you.

To find out more about the Polish or other inbound markets browse our markets & segments pages or ([visitbritain.org/markets-segments](https://www.visitbritain.org/markets-segments)) our inbound research & insights or ([visitbritain.org/inbound-research-insights](https://www.visitbritain.org/inbound-research-insights)) contact us directly (Email: [research@visitbritain.org](mailto:research@visitbritain.org))



# Market and Trade Profile: Poland

April 2018