

Poland Tourism Report 2016

<https://marketpublishers.com/r/P1AAF268E76EN.html>

Date: April 2016

Pages: 30

Price: US\$ 1,295.00 (Single User License)

ID: P1AAF268E76EN

Abstracts

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BMI View: Poland has a relatively well-established tourism industry, supported by a growing business travel sector and robust domestic tourism market. The country benefits from a positive location in between key source markets in Europe and has an extensive transport network, including cross-border road and rail connections and growing air travel capacity. The hotel market has undergone significant expansion in recent years, benefiting from Poland's openness to foreign investors as well as development in the run-up to Poland's hosting of major sporting events. Moving forward, we expect to see slow growth in international tourism arrivals to Poland. The country faces significant competition from other European destinations, and travel is likely to be impacted by negative regional trends, including a potential economic slowdown and security concerns.

Key Updates And Forecasts

Poland continues to expand international connectivity with the addition of new flight routes to a number of destinations. Airlines that are launching new flight routes to Poland in 2016 include Ryanair, LOT Polish Airlines and Lufthansa Group. Investments are also being made at key airports. Krakow Airport is reportedly spending PLN150mn (EUR32.4mn) on upgrades to terminal buildings in 2016.

Investment is also taking place in Poland's hotel sector, with an increasing focus on mid-to-high-end hotels and second-tier cities where the hotel market is less developed. Hotel groups with new properties under development include Starwood, InterContinental Hotels Group and Carlson Rezidor.

At present we are forecasting relatively slow growth in international arrivals to Poland over the course of the forecast period, with the inbound travel market expected to grow from 16.6mn in 2016 to 17.9mn in 2020.

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