



Polski Związek Organizatorów Turystyki
Polish Tour Operators Association

Polish Tourism 2016/17 from the perspective of Polish Tour Operators Association &



Data source: MerlinX*

** MerlinX is one of the most popular reservation systems used by Polish travel agents*

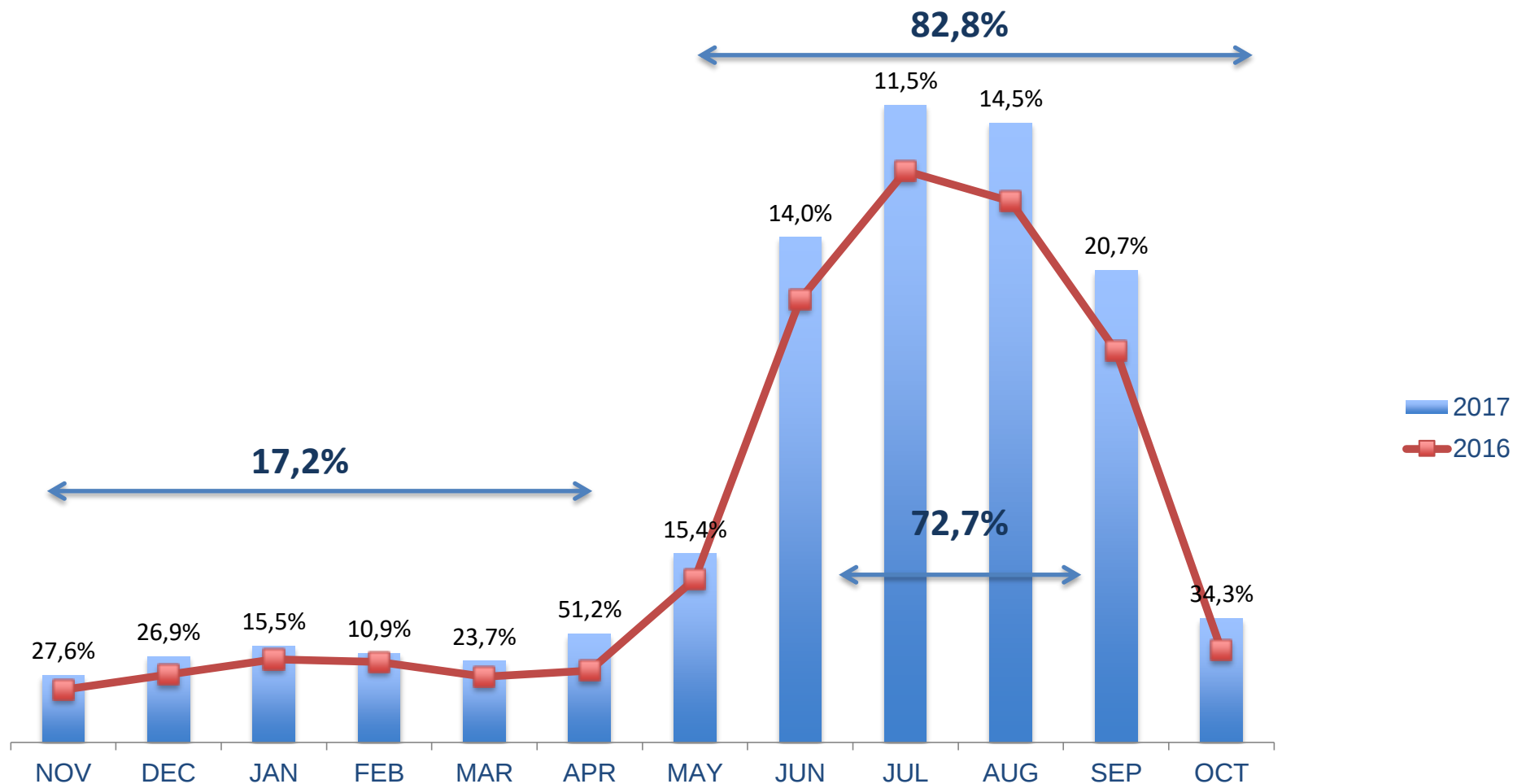


Polish tourism in numbers

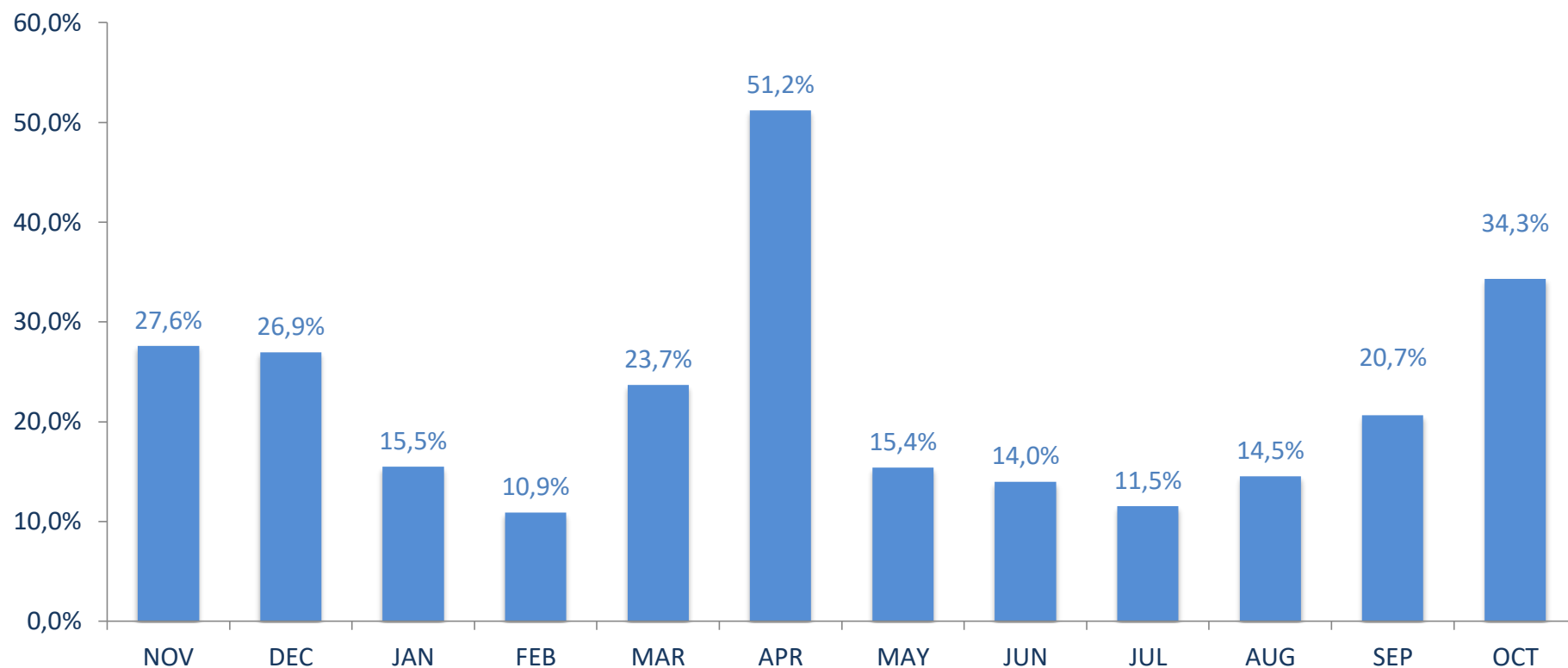


- > 4.400 organisers in central register
- < 2.000 retailers/travel agents
- > 100 tour operators bookable in MerlinX
- Total sales $\approx$ < 7 mld. PLN
- Number of clients $\approx$ < 3 mln

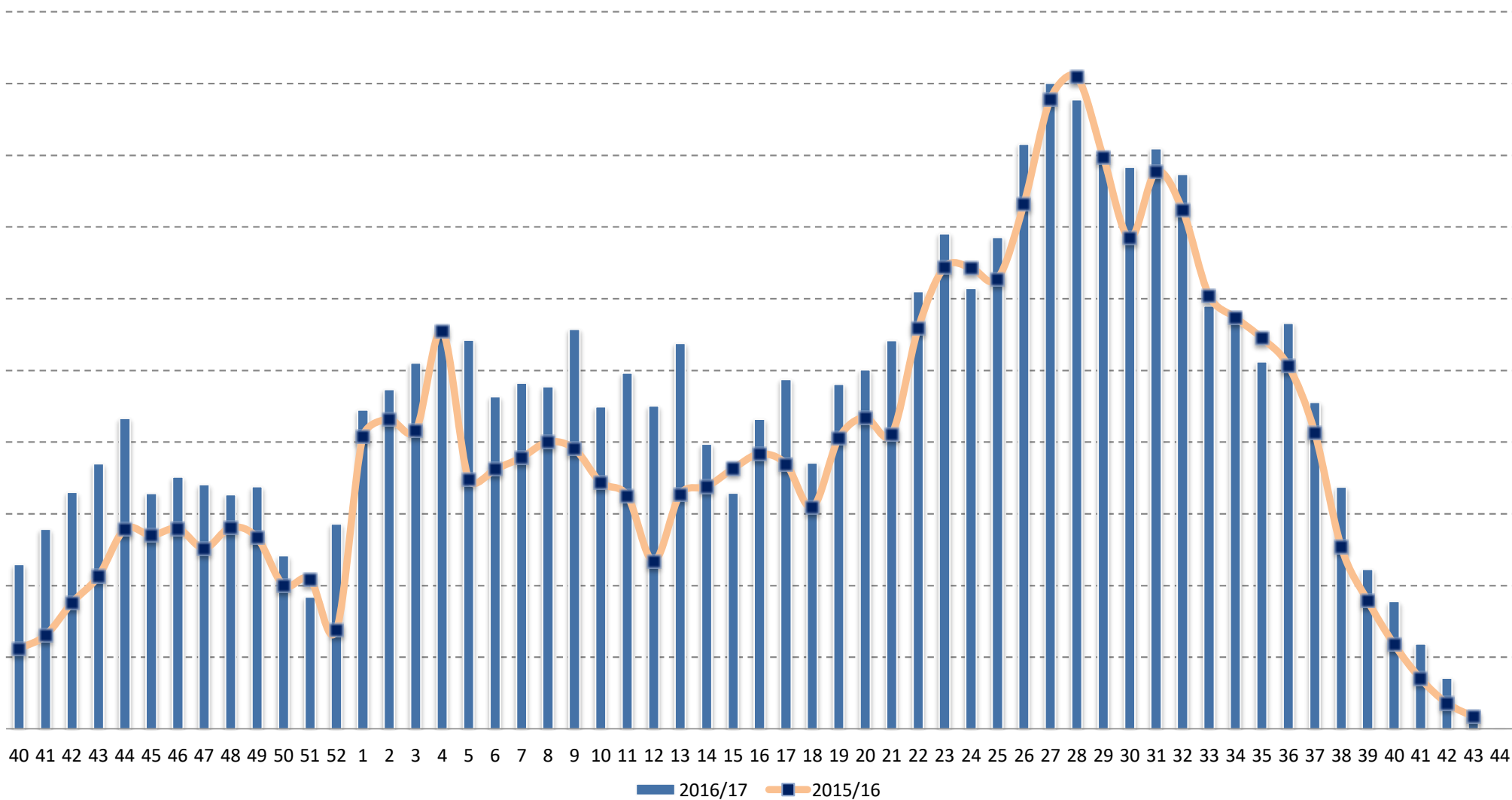
Seasonality remains challenging in 2017



Departures per month +/-%



Bookings weekly 2016/17 v. 2015/16



Cumulative number of clients in 2016/17

compared with 2015/16

Clients +/- %

Bus

15,5%



Own journey

21,5%



Flight

16,77%

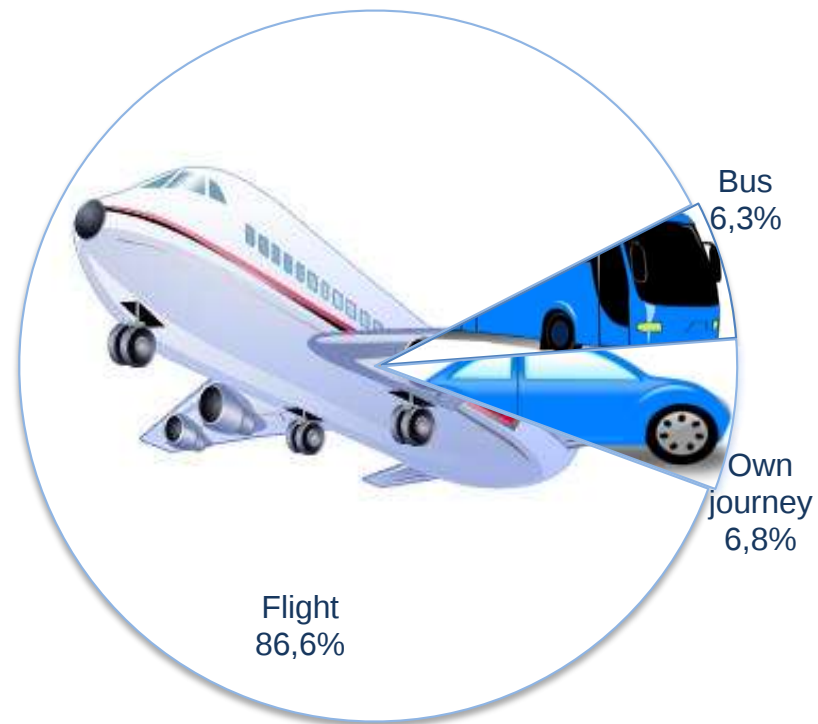


Total

17,1%



Share %



Ranking of the most popular destinations in 2017

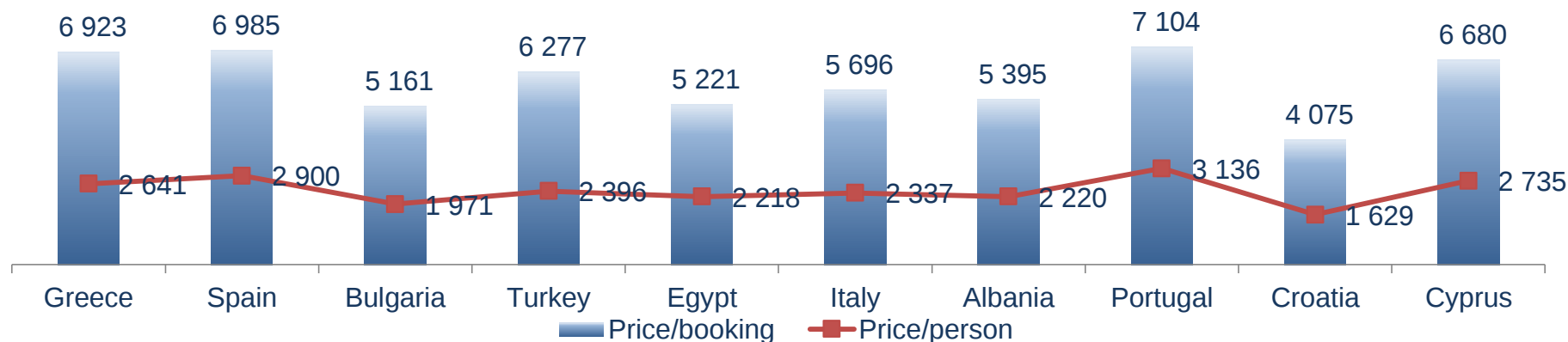
Rank	Country	+/- % last year	Share %
1	Greece	7,9%	31,5%
2	Spain	1,3%	16,5%
3	Bulgaria	11,0%	9,0%
4	Turkey	37,5%	7,9%
5	Egypt	111,7%	6,6%
6	Italy	15,7%	6,3%
7	Albania	99,5%	2,6%
8	Portugal	10,8%	2,4%
9	Croatia	-1,2%	2,2%
10	Cyprus	5,7%	1,4%
11	Poland	20,6%	0,9%
12	Cuba	53,7%	0,8%
13	Morocco	20,0%	0,7%
14	Austria	3,5%	0,7%
15	UAE	31,6%	0,7%
16	Tunisia	41,1%	0,7%
17	Malta	120,5%	0,7%
18	Dom. Rep.	-1,0%	0,5%
19	Czechia	29,1%	0,5%
20	Oman	++	0,5%

Rank	Destination	+/- % last year
1	Heraklion	-1,4%
2	Antalya	48,2%
3	Burgas	10,5%
4	Zakynthos	10,4%
5	Rodos	10,2%
6	Korfu	-1,8%
7	Fuerteventura	-0,1%
8	Varna	9,8%
9	Hurghada	97,7%
10	Chania	3,6%
11	Teneryfa	-3,7%
12	Marsa Alam	85,6%
13	Kos	26,5%
14	Mallorca	-4,0%
15	Tirana	168,1%
16	Gran Canaria	10,2%
17	Lanzarote	12,2%
18	Saloniki	23,0%
19	Madera	10,7%
20	Bodrum	17,7%

Most popular countries, price comparison in 2017 v. 2016

T17 vs T16

Rank	Country	Price/booking	Price/person
1	Greece	8,1%	4,7%
2	Spain	0,0%	-0,7%
3	Bulgaria	7,2%	4,1%
4	Turkey	15,8%	11,6%
5	Egypt	6,2%	1,6%
6	Italy	13,5%	6,9%
7	Albania	14,4%	7,4%
8	Portugal	-1,5%	-2,3%
9	Croatia	-10,1%	-8,7%
10	Cyprus	10,3%	6,8%



Most popular destination, price comparison in 2017 v. 2016

T17 vs T16



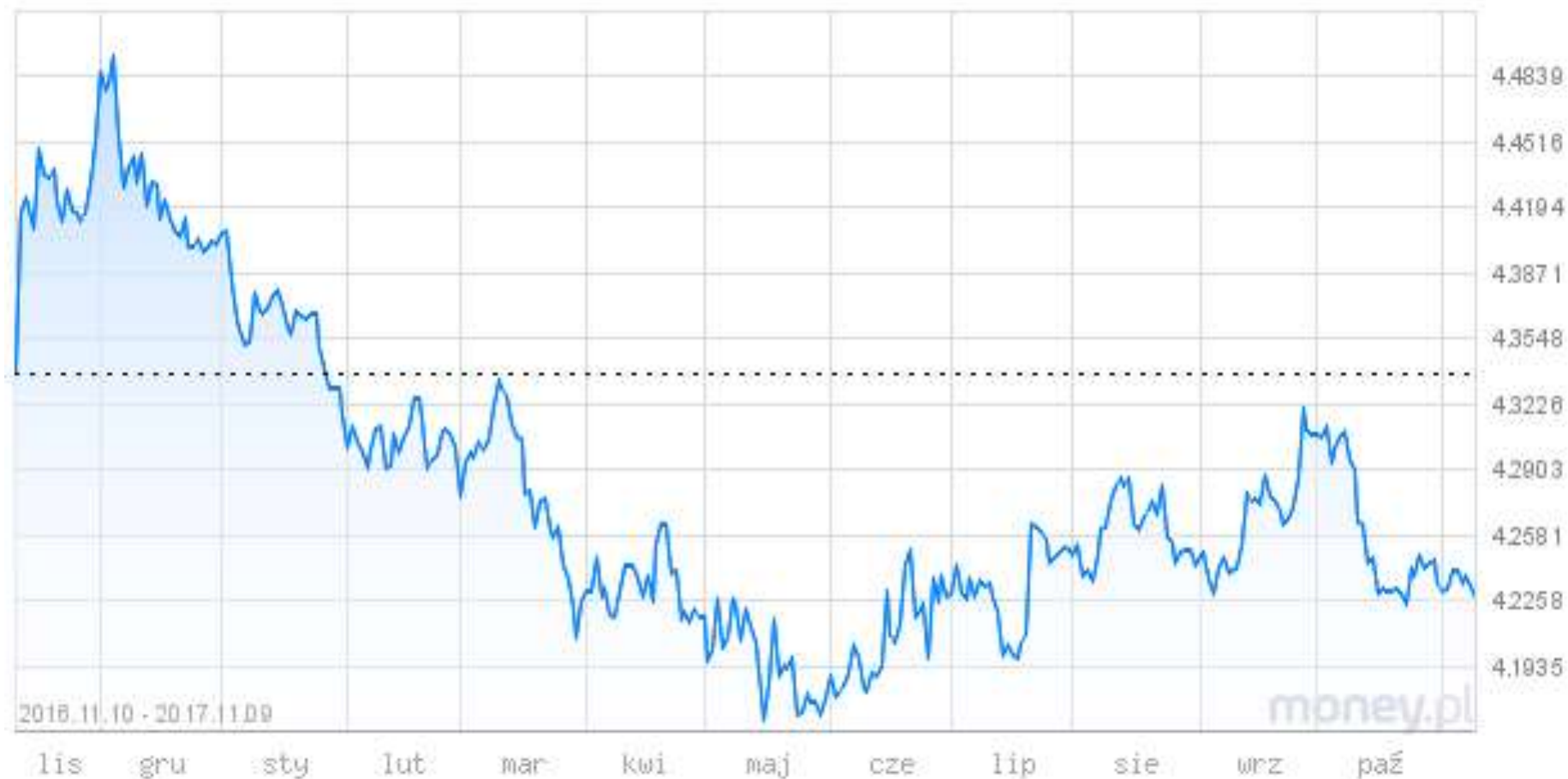
Rank	Country	Price/booking	Price/person
1	Heraklion	14,6%	7,7%
2	Antalya	17,1%	12,4%
3	Burgas	8,7%	3,5%
4	Zakynthos	12,3%	7,3%
5	Rodos	10,9%	6,7%
6	Korfu	7,0%	2,9%
7	Fuerteventura	3,9%	0,2%
8	Varna	14,2%	6,1%
9	Hurghada	9,6%	2,3%
10	Chania	10,1%	5,4%
11	Teneryfa	4,1%	3,1%
12	Marsa Alam	7,8%	3,7%
13	Kos	11,5%	5,2%
14	Mallorca	4,3%	2,8%
15	Tirana	8,8%	3,8%
16	Gran Canaria	2,5%	0,9%
17	Lanzarote	2,1%	-2,6%
18	Saloniki	12,7%	4,8%
19	Madera	1,9%	-1,0%
20	Bodrum	19,1%	13,6%

Prices of package holidays in PLN

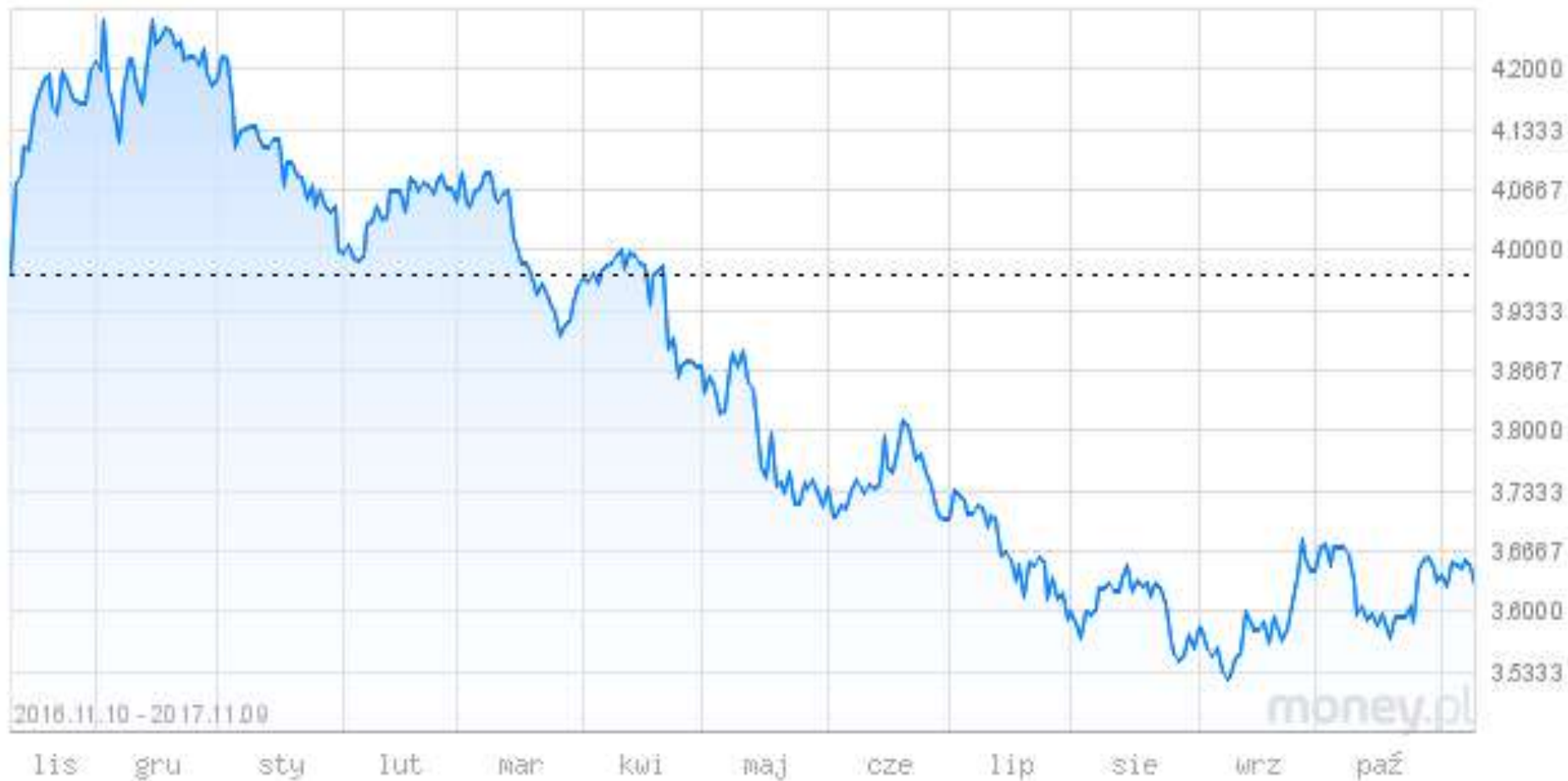
Prices PLN	2017	2016	+/- %
Booking	6 209	6 013	3,26%
Client	2 532	2 488	1,77%
Package by air	2 756	2 698	2,15%
Bus + hotel	1 297	1 319	-1,67%
Own journey	1 293	1 327	-2,56%
Clients per booking	2,45	2,42	1,49%



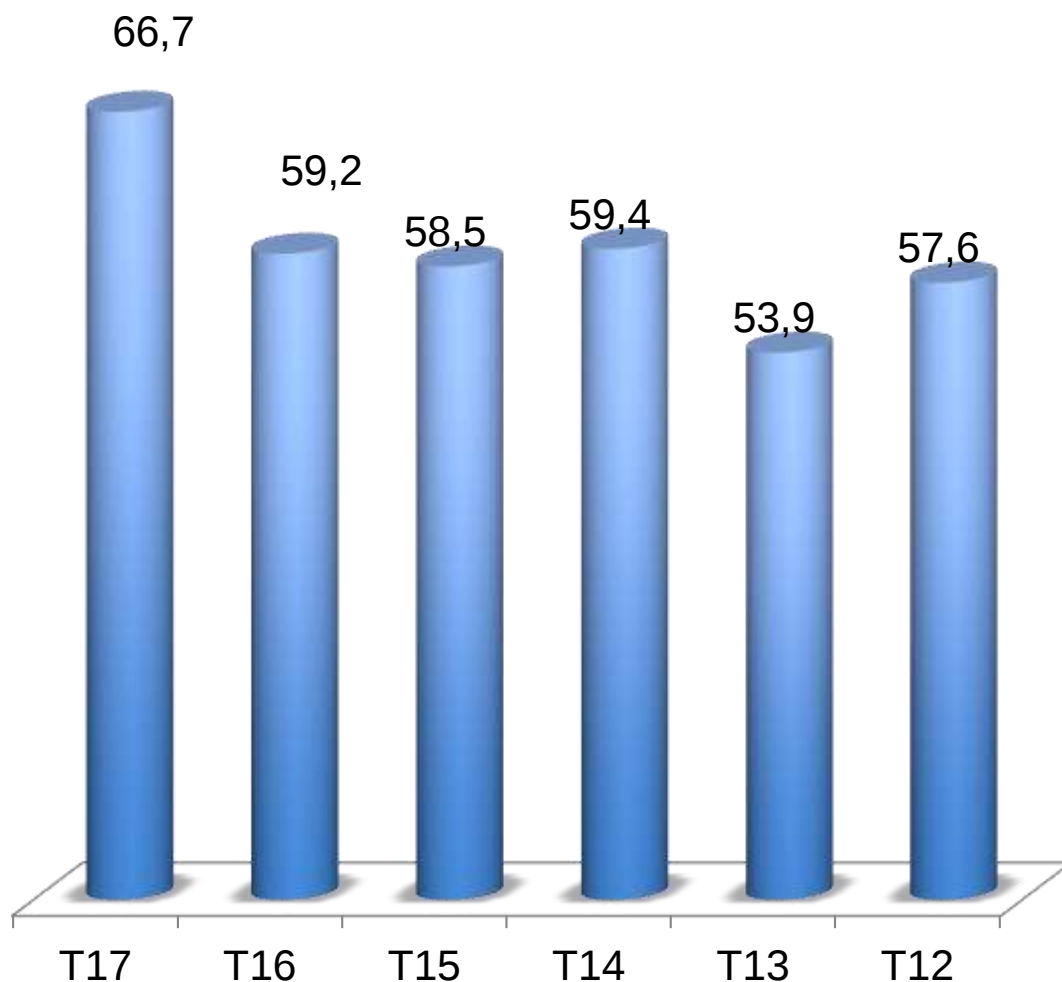
Purchasing power of PLN/EUR



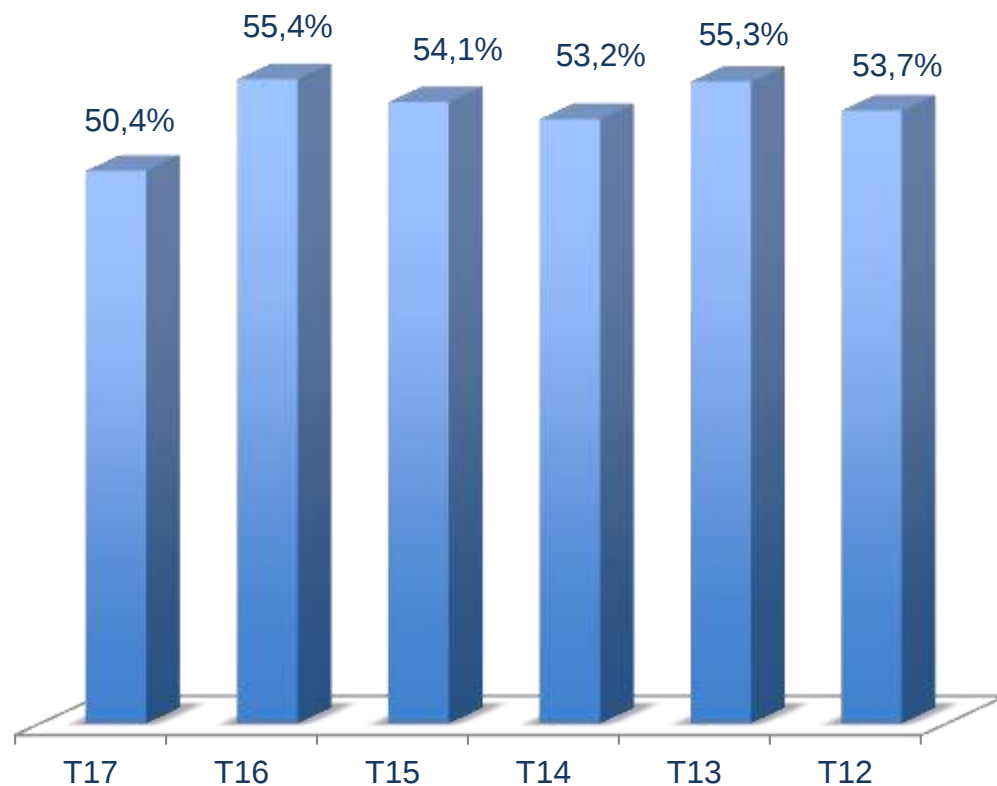
Purchasing power of PLN/USD



Booking in advance - # days prior to departure

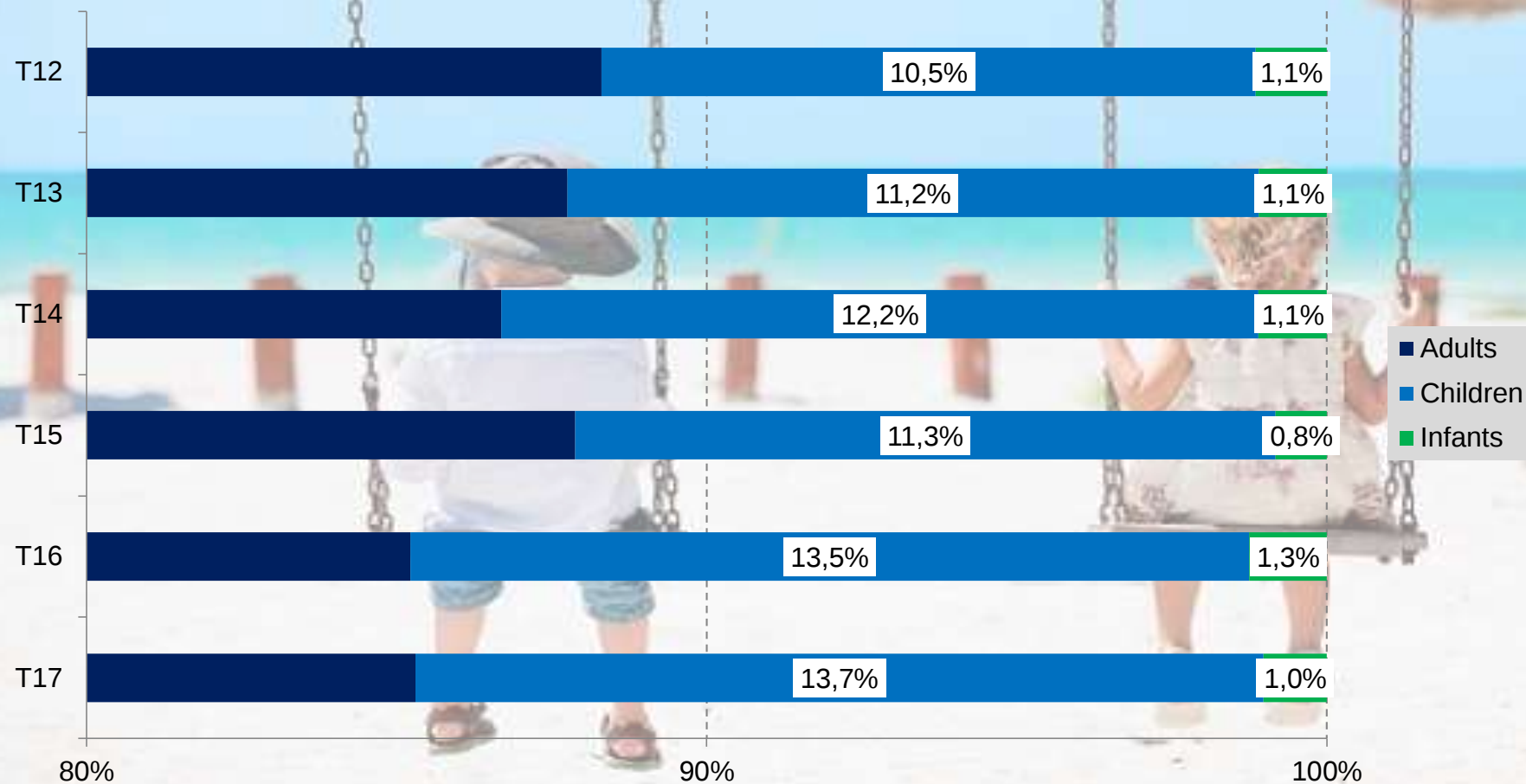


Last Minute* share



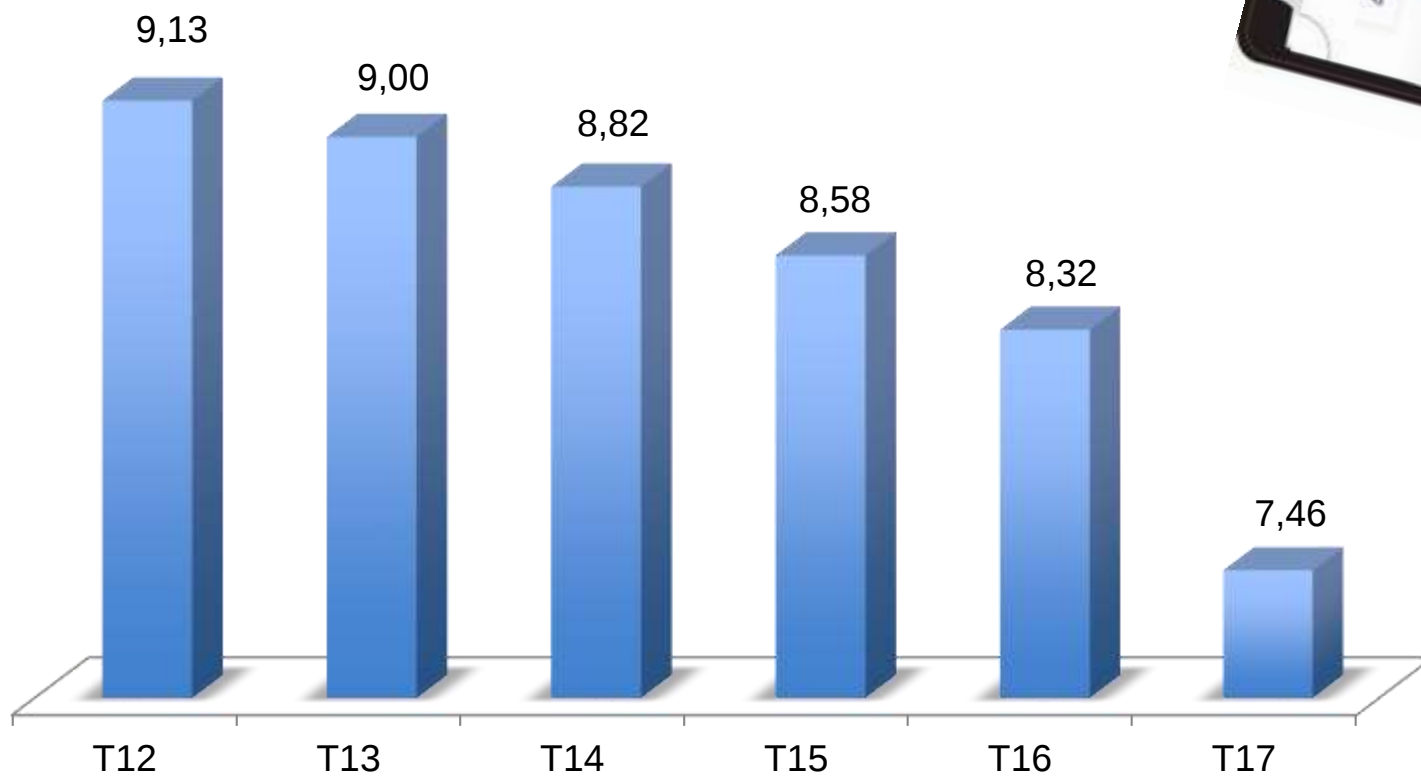
* Bookings less than 30 days prior to departure date

Children share

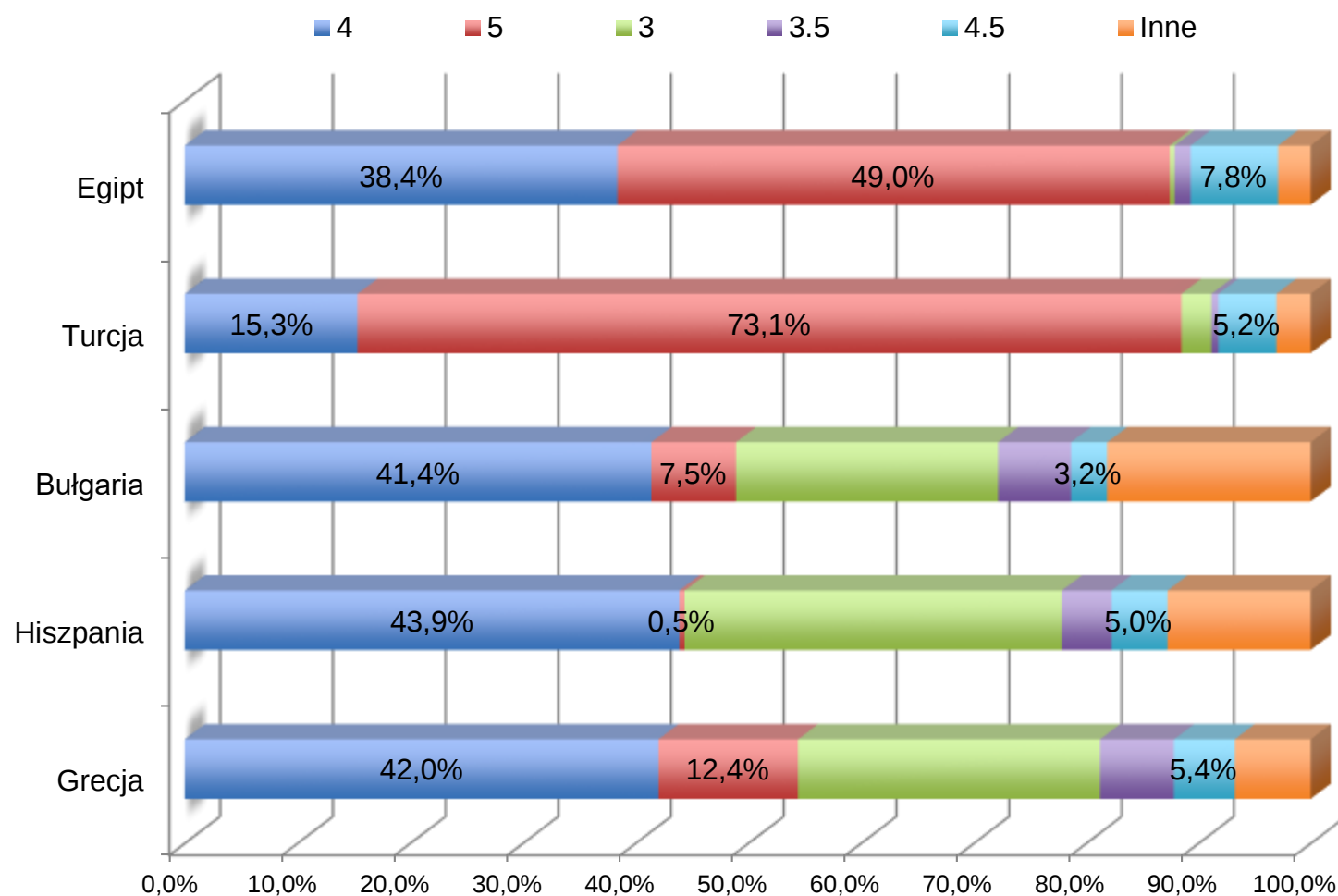


Length of stay

Stay in days



Preferred hotel category



Categ. > 4,0

95%

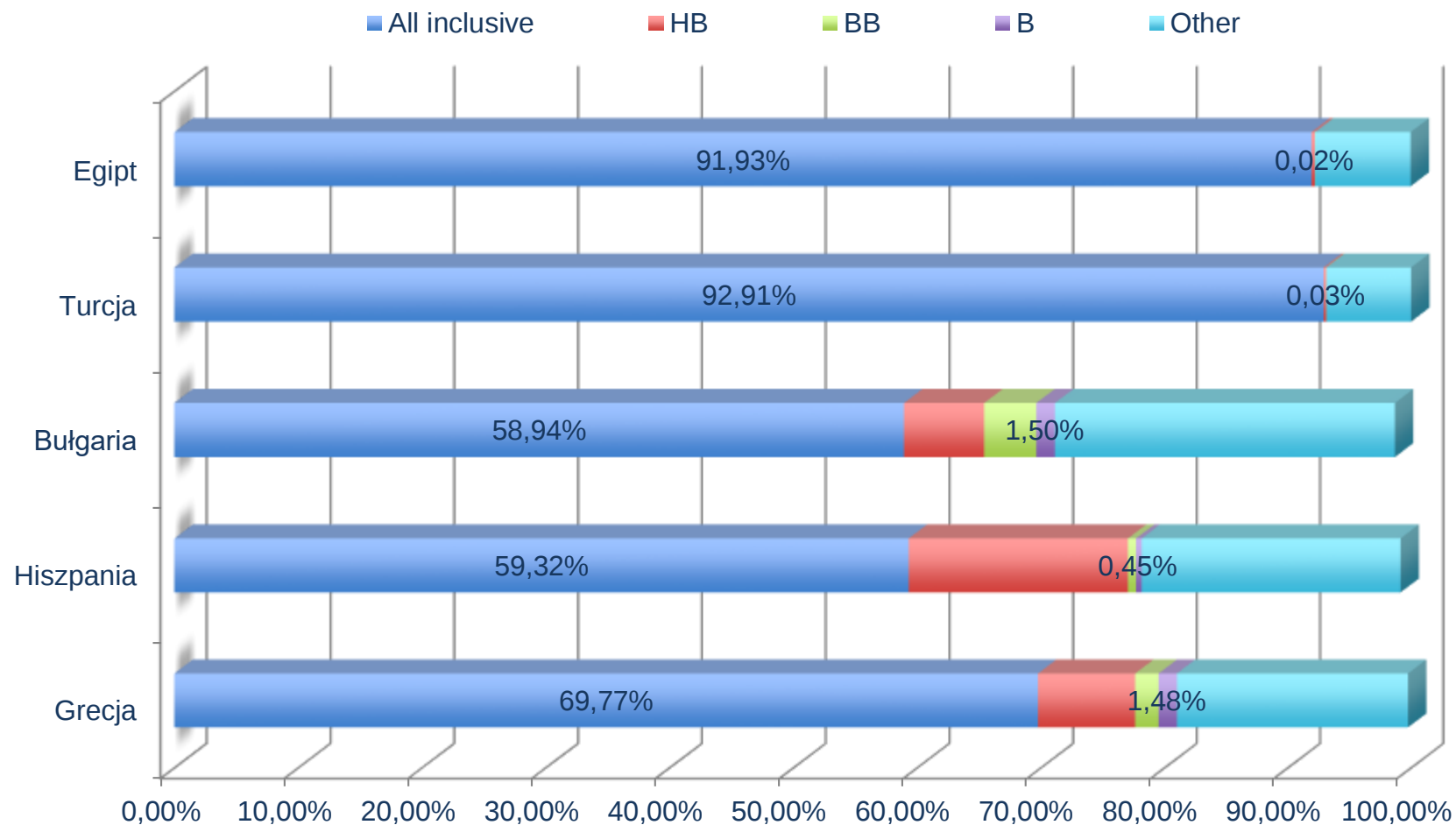
94%

52%

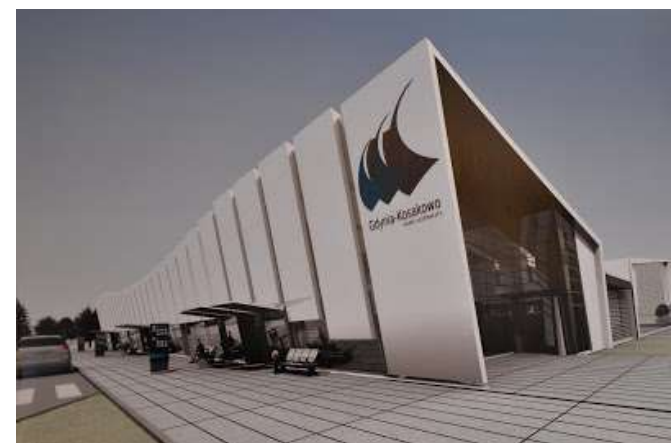
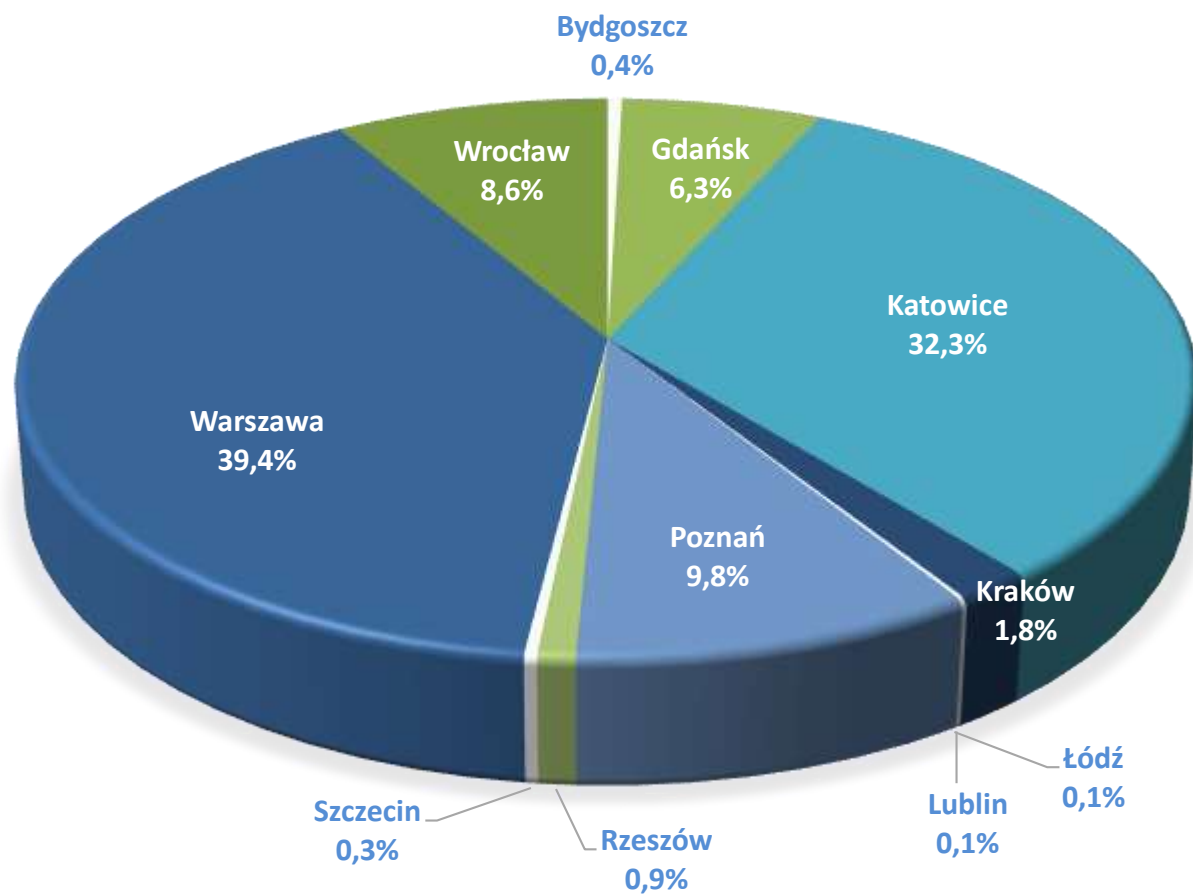
49%

60%

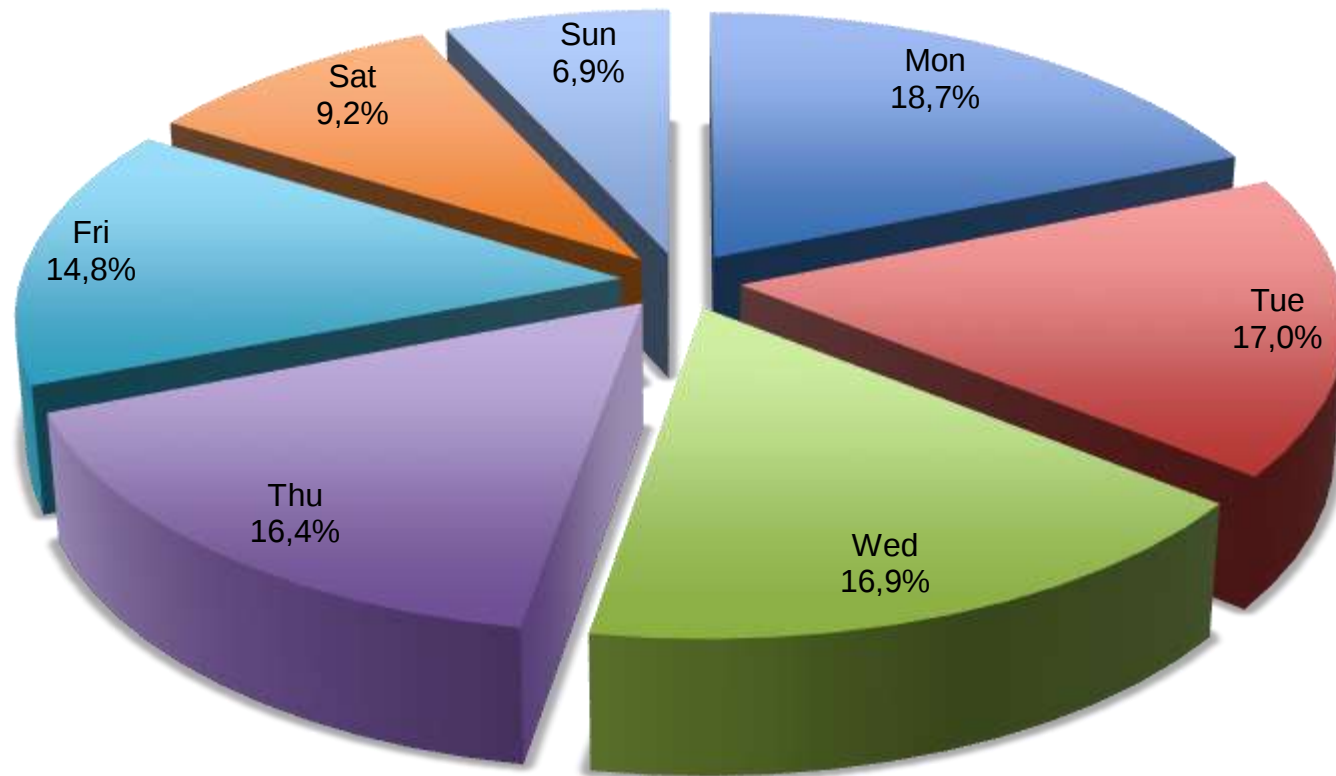
Meals



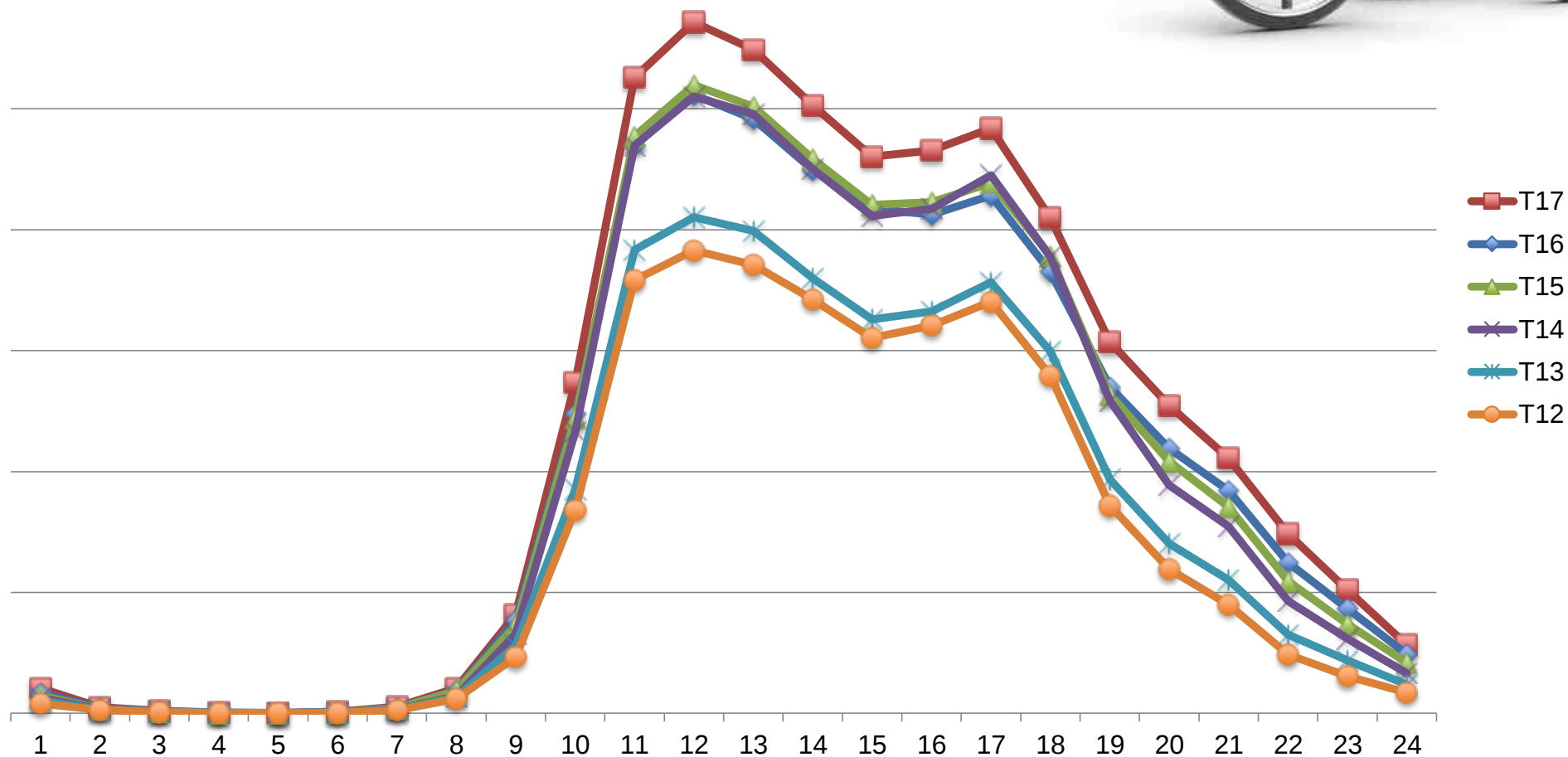
Domestic airports' shares in 2017



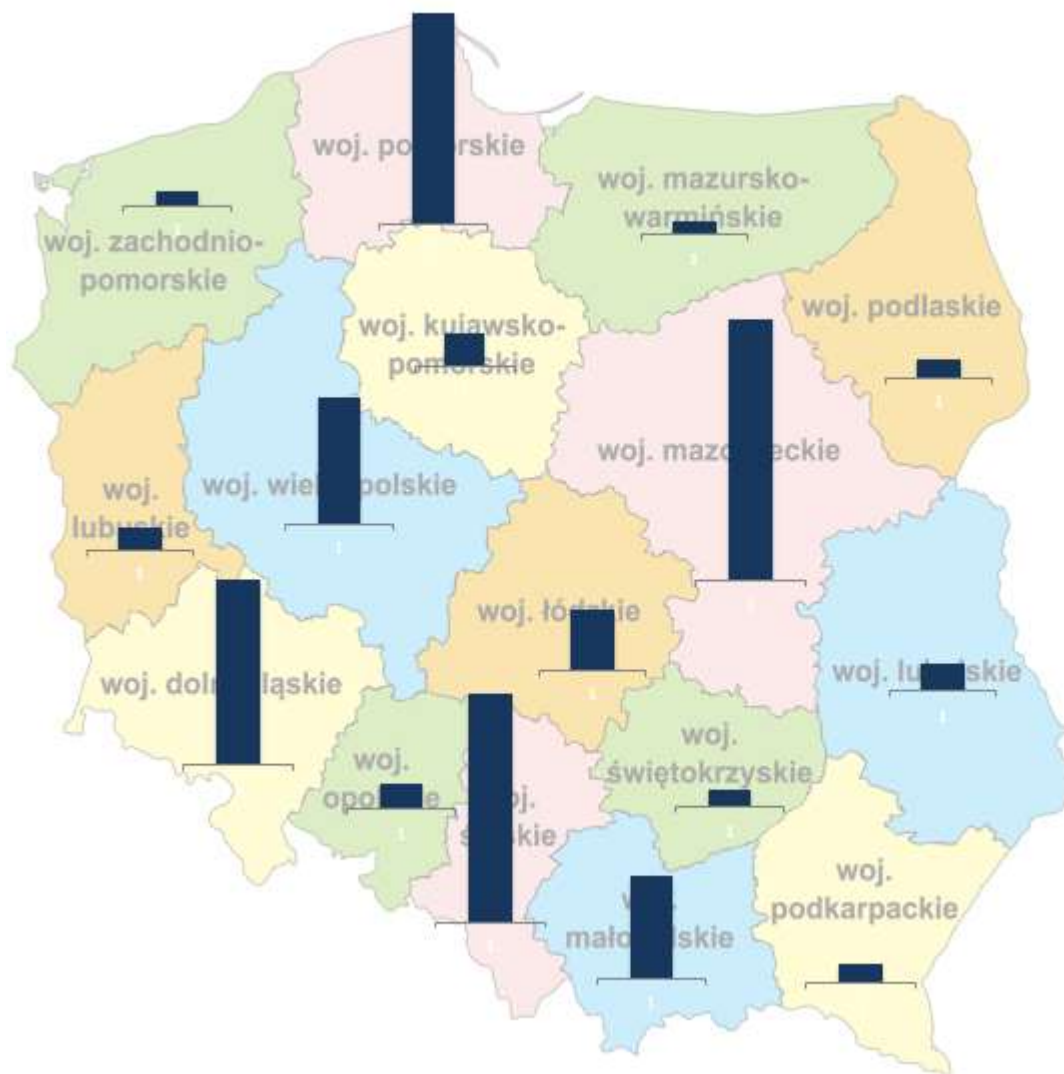
Booking days



Booking time



Ranking of voivodeships - % clients



Voivodeship	Share%
mazowieckie	19,0%
śląskie	16,7%
pomorskie	15,4%
dolnośląskie	13,5%
wielkopolskie	9,3%
małopolskie	7,5%
łódzkie	4,5%
kujawsko-pomorskie	2,5%
lubelskie	1,9%
opolskie	1,9%
podkarpackie	1,5%
lubuskie	1,6%
podlaskie	1,4%
świętokrzyskie	1,3%
zachodniopomorskie	1,1%
warmińsko-mazurskie	1,0%
	100,0%



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Detailed reports are available for
PZOT members

Questions should be addressed to
pzot@pzot.pl