

Tourism industry in European Union countries

A brief overview of the tourism industry in Poland

The COVID-19 pandemic had a devastating impact on the Polish tourism industry in 2020

In 2019, the travel and tourism industry reached a record high, with a market value of EUR 37.5bn. However, by 2022, the market size had contracted to EUR 31.6bn. This represents a negative CARC of 5.5% over the period from 2019 to 2022. The number of enterprises operating within the tourism industry was 21.2ths units in 2021.

In the aftermath of the pandemic, Poland adopted an open-door policy, which led to a significant increase in international tourist arrivals. In 2022, the country welcomed 13.9mn tourists, marking a 21.7% year-on-year growth from the 11.4m arrivals recorded in 2021. Germany remained the leading source of inbound tourism, contributing 54.9% of the total. Ukraine followed as the second-largest source market, accounting for 22.6% of inbound tourism.

In 2022, international travel receipts amounted to EUR 11.4bn, with a 58.3% increase from the EUR 7.2bn recorded in 2020.

Poland is renowned for its diverse recreational offerings, including its 13 UNESCO World Heritage sites, vibrant nightlife, shopping opportunities, festivals, sports and cultural events. The country's religious sites, such as St. Mary's Basilica (the Church of Virgin Mary) in Kraków and Ostrow Tumski (Cathedral Island), have become popular destinations, contributing to an increase in tourist arrivals and driving growth in the tourism sector.

The country's diverse range of attractions caters to a broad cross-section of the travel market. These include popular weekend and city-break destinations such as Warsaw, Kraków, Łódź, and Gdańsk, nature and wildlife reserves, a significant historical tourism sector and a small but growing beach holiday segment. This diversity positions Poland as a compelling choice for a wide variety of travellers.

The tourism industry is poised for robust growth, bolstered by government initiatives aimed at promoting the country's tourism sector. The Polish Tourism Organisation is leveraging sporting and cultural events to attract international tourists. For instance, the city of Kraków and the Malopolska region are set to host the 2023 European Games, an event expected to draw a large number of foreign tourists. The Polish tourism board is capitalising on this opportunity to promote the country abroad through the sports event.

Poland, a well-established tourism destination in Central and Eastern Europe (CEE), welcomes a significant number of international visitors each year. While it may not operate on the same scale as leading Western European destinations like France and Germany, Poland surpasses all other neighbouring markets, including Ukraine and the Czech Republic, in terms of arrivals.

In 2022, the food service sector emerged as the largest segment within the industry, generating total revenues of EUR 13.1bn. This accounted for 41.5% of the industry's overall value. The passenger rail segment also made a significant contribution, with revenues of EUR 6.0bn in 2022, representing 18.9% of the industry's total value.

Poland travel & tourism industry category segmentation 2017-2022, EUR bn

