

Poland

Tourism in the economy

In 2018, the total value of the tourism economy in Poland was estimated at PLN 124.6 billion - a rise of 6.8% over 2017. This equates to an estimated contribution of 6.0% to Poland's GDP (direct and indirect impact). In 2018, 195 675 people were employed in the accommodation and catering sector, an increase of 1.0% compared to 2017. Travel exports represented 20.3% of total service exports in 2018.

International arrivals increased by 2.6% to 85.9 million visits although this figure includes a substantial number of day visitors. There were 19.6 million international tourist arrivals, showing an increase of 7.5% over 2017, and setting a new record for Poland. Germany remains the largest source market, accounting for 34.2% of international tourist arrivals. This is followed by Ukraine (10.4%), and then the United Kingdom and Lithuania (both respectively accounting for 4.7% of inbound tourists). Compared to 2017, international tourism receipts increased by 2.9% to reach PLN 61.1 billion in 2018, accounting for 5.2% of total export earnings.

The number of domestic tourists totalled 47.7 million in 2018, an increase of 3.9% compared to 2017. The majority of domestic trips (60.6%) were short visits of between two and four days. Compared to 2017, revenues from domestic tourism increased by 14.5%, reaching PLN 27.7 billion in 2018.

Tourism governance and funding

Since November 2019, tourism is within the scope of the Minister of Economic Development. The Ministry is responsible for all tourism-related matters, including the management and regulation of tourism. Legislation within the competence of the Ministry in the field of tourism administration includes the 2017 Act on package travel, the 2010 regulation relating to hotel classification, the 2004 regulation relating to hotel and other accommodation facilities, the 1999 Act establishing the Polish Tourism Organisation and its implementing regulations, and the 1997 Act on accommodation services and services of tour leaders and tourist guides.

The Ministry also supervises the Polish Tourism Organisation which is responsible for the marketing and promotion of Poland as a tourist destination, carrying out statistical and marketing analyses, and ensuring the development and operation of the Polish tourist information system. The organisation has 14 international offices located in established and emerging source markets and co-operates with regional and local tourist organisations as well as others involved in the promotion and development of tourism at the regional level.

At sub-national level, the primary role in tourism development is played by regional governments as well as local governments, at county and municipal level. Local or regional level tasks fall into two groups: the public sector tasks not allocated to other bodies under relevant legislation; and tasks commissioned by the National Government.

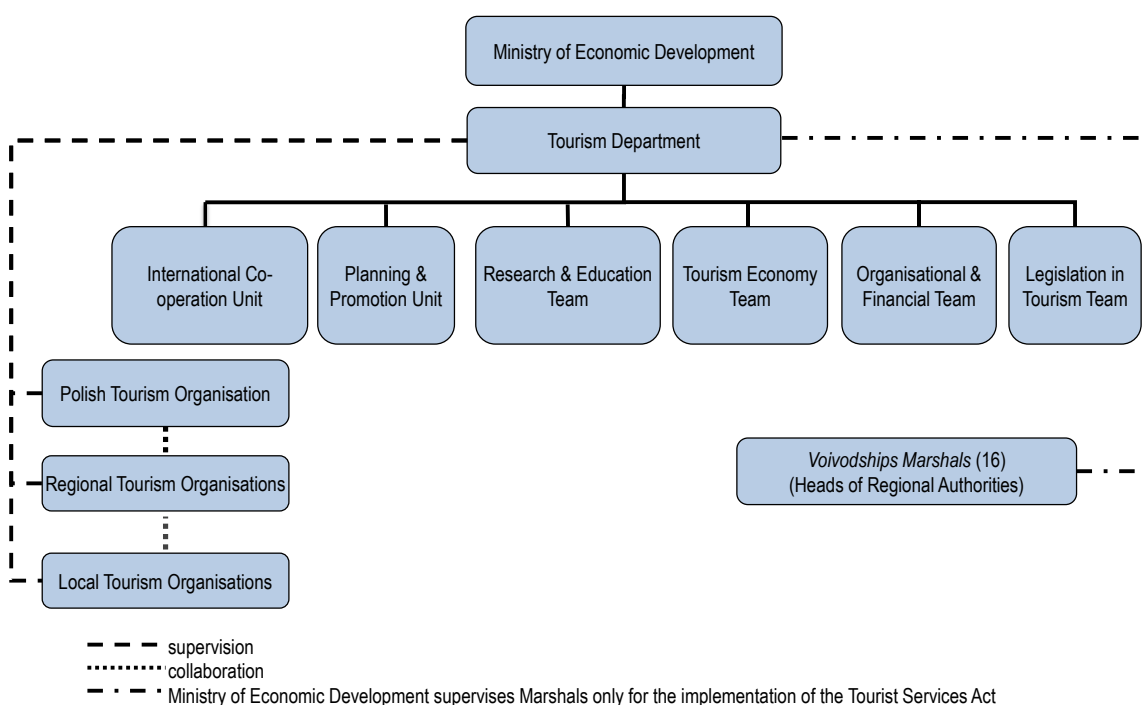
Regional Tourism Organisations (RTOs) are organisations within which co-operation is conducted between the local government (particularly at the *voivodship*, i.e. province level) and the tourism industry particularly

in the field of consumer marketing and promotion of the geographic area covered by the organisation's activities, both in the country and abroad. An RTO has the legal status of an association. As well as promotion, its roles typically include supporting the operation and development of tourist information systems, initiating, assessing and supporting tourism infrastructure development and modernisation plans, and co-operation with the Polish Tourism Organisation.

At the local level, there are about 120 local tourism organisations. Commissioned tasks include the classification of local hotel facilities, the supervision and registration of companies and entrepreneurs operating as travel agents or tour operators as well as the registration of other specific trades, such as mountain guides.

In 2018, the tourism budget amounted to PLN 60.9 million, including the budget for the Polish Tourism Organisation of PLN 49.5 million. In addition, in the years 2014-2020, specific tourism sector projects were supported by EU structural funds. The budget has increased year on year and has seen an overall increase of 26.9% since 2014. According to the draft 2020 budget, the allocation for Tourism is PLN 61 million together with PLN 181 000 from EU project funding.

Poland: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economic Development, 2020.

Tourism policies and programmes

The main objective of Poland's national tourism policy is to strengthen the development of a competitive and innovative tourism sector by supporting organisations and initiatives in the tourism sector, while respecting the principles of sustainable development. The approach focuses on a competitive and innovative tourism, modern tourism management systems, and training in occupations related to the tourism industry.

Operational goals are defined in the Programme for Tourism Development until 2020. In 2018, the Ministry of Sport and Tourism initiated the *Polish Tourist Brands* project. The main objective is to identify, build and bring to market leading offers from outstanding Polish tourism brands. The approach aims to encourage more proactive marketing and management of tourist destinations. It also helps to increase the effectiveness of marketing messages and raises the profile of diverse regional tourism destinations, encouraging visitors to explore wider and extend their stay. The ultimate aim of the project is the development of coherent tourism regions and unified tourism routes with individually strong brands, each of which provides a specific marketing umbrella for tourism operators from any given area. Thanks to the implementation of the Polish Tourist Brand project the Polish Tourism Organisation now has a suite of new products to highlight a wide range of Polish tourist regions, attractive to different types of visitors.

An important project initiated by the Ministry of Sport and Tourism is the *Poland See More* domestic tourism campaign. Currently delivered by the Polish Tourism Organisation in co-operation with the Ministry, the campaign presents a nationwide offer and encourages residents to take advantage of attractions and tourist services throughout the country, particularly in the shoulder seasons. In 2018, nearly 300 000 destinations benefited from the spring and autumn campaigns. Participants can benefit from discounts of at least 50% from a variety of the offers registered at the campaign's website, and this has stimulated incremental domestic tourism growth of wide benefit to the tourism industry.

Statistical Profile

Poland: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	95 973
Overnight visitors (tourists)	38 387	39 870	43 600	45 952	47 736
Same-day visitors (excursionists)	..	..	..	..	48 237
Nights in all types of accommodation	177 667	186 759	203 038	214 207	224 767
Hotels and similar establishments	30 694	35 429	42 149	44 595	47 324
Other collective establishments	52 854	56 366	63 750	66 841	71 902
Private accommodation	94 118	94 963	97 140	102 772	105 541
Inbound tourism					
Total international arrivals	73 750	77 743	80 476	83 804	85 947
Overnight visitors (tourists)	16 000	16 728	17 471	18 258	19 623
Same-day visitors (excursionists)	57 750	61 015	63 005	65 546	66 324
Top markets					
Germany	5 743	6 012	6 288	6 504	6 704
Ukraine	1 072	1 198	1 265	1 360	2 038
Russian Federation	1 003	873	801	875	919
United Kingdom	664	753	797	851	919
Belarus	811	801	715	763	793
Nights in all types of accommodation	99 107	92 843	108 401	113 202	122 065
Hotels and similar establishments	28 439	24 495	36 904	41 390	47 195
Other collective establishments	13 653	11 050	9 388	8 569	13 781
Private accommodation	57 016	57 298	62 109	63 243	61 089
Outbound tourism					
Total international departures	35 353	44 017	44 494	46 681	48 615
Overnight visitors (tourists)	10 243	10 906	11 287	11 958	12 747
Same-day visitors (excursionists)	25 110	33 110	33 208	34 723	35 868
Top destinations					
Germany	2 061	2 199	2 310	2 357	2 438
Italy	827	879	936	1 000	1 055
United Kingdom	872	856	915	971	1 031
Czech Republic	495	585	655	725	762
Greece	..	..	..	..	752
TOURISM RECEIPTS AND EXPENDITURE, MILLION PLN					
Inbound tourism					
Total international receipts	40 685	42 770	47 444	52 908	56 969
International travel receipts	37 298	39 454	43 218	47 974	50 807
International passenger transport receipts	3 387	3 316	4 226	4 934	6 162
Outbound tourism					
Total international expenditure	30 056	32 117	33 900	35 864	38 411
International travel expenditure	27 934	29 913	31 412	33 264	35 200
International passenger transport expenditure	2 122	2 204	2 488	2 600	3 211

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077654>

Poland: Enterprises and employment in tourism

	Number of establishments	Number of persons employed ¹				
	2018	2014	2015	2016	2017	2018
Total	..	..	..	..	..	..
Tourism industries	23 208	..	..	..	..	..
Accommodation services for visitors	11 076	171 138	172 043	180 707	193 663	195 675
Hotels and similar establishments	4 179	..	..	..	..	..
Food and beverage serving industry	7 953	..	..	..	..	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	4 449	..	..	..	..	..
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available

1. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077673>

Poland: Internal tourism consumption

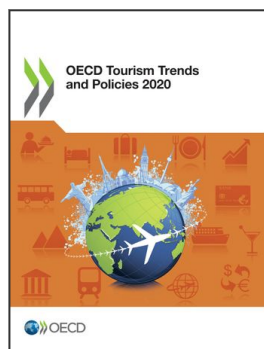
Million PLN

	2015		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	21 420	36 750	65 099
Tourism characteristic products	15 411	12 854	31 500
Accommodation services for visitors	4 853	3 320	10 244
Food and beverage serving services	4 874	4 328	9 202
Passenger transport services	3 066	2 825	6 599
Air passenger transport services	2 058	1 897	4 121
Railways passenger transport services	219	113	697
Road passenger transport services	783	724	1 685
Water passenger transport services	6	91	97
Passenger transport supporting services	..	..	..
Transport equipment rental services	167	0	547
Travel agencies and other reservation services industry	2 031	458	2 566
Cultural services	419	1 923	2 342
Sports and recreation services	..	..	..
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	6 009	23 896	33 600
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077692>



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