

Poland

Tourism in the economy and outlook for recovery

In 2020, the total value of the tourism economy in Poland was estimated at PLN 104.3 billion – a decrease of 26.4% since 2019. This equates to an estimated 4.5% of Poland's GDP (accounting for direct and indirect impacts). In 2020, 195 539 people were employed in the accommodation and catering sector, a decrease of 6.1% compared to 2019.

After hitting a record high of 21.2 million international tourist arrivals in 2019, Poland recorded just 8.4 million arrivals in 2020, a decrease of 60.2%. Germany remains the largest source market, accounting for 40.7% of inbound tourism. The second largest source market was Ukraine (12.1%). In 2020, international tourism receipts decreased by 60.7% to PLN 28.1 billion, accounting for 2.1% of total export earnings.

In 2021, international arrivals increased to 9.7 million, but remained 54% below pre-pandemic levels. Poland recorded a faster recovery for domestic tourism, with 46.3 million domestic tourists in 2021, only 7.4% below the 2019 level.

At the beginning of the war in Ukraine, Poland experienced a decline in bookings across the country. Due to the persisting uncertainty of the multiple crises, the pace of the tourism rebound in Poland is difficult to forecast. It is projected that in 2024 international arrivals will come close to the pre-pandemic levels, and in 2025 it may exceed this level.

Tourism governance and funding

In 2021, the Minister of Sport and Tourism took over responsibility for tourism from the Minister of Economic Development. The Ministry of Sport and Tourism is responsible for all tourism-related matters, including the sector's management, legislation and regulation.

The Ministry also supervises the Polish Tourism Organisation responsible for marketing and promoting Poland as a tourist destination 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 and others involved in promoting and developing tourism at the regional level.

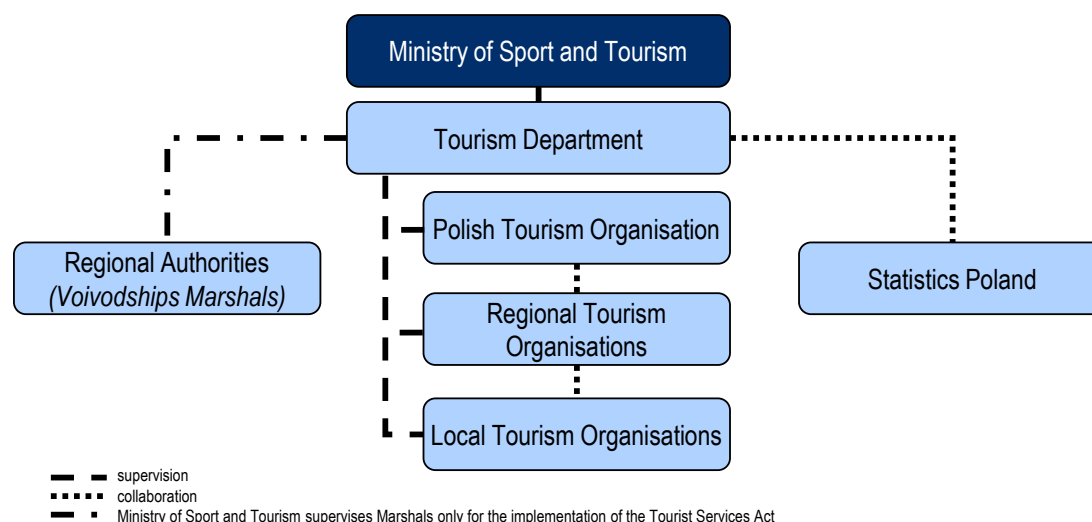
At the county and municipal levels, tourism development is the responsibility of regional and local governments. Local or regional-level tasks fall into two groups: tasks not allocated to other bodies under relevant legislation and tasks commissioned by the National Government. Regional Tourism Organisations (RTOs) are organisations within which co-operation is conducted between the local government (particularly at the provincial level) and tourism sector representatives. Joint activities focus on product and tourist information system development, consumer marketing, and promotion in Poland and abroad. As well as promotion, its role typically includes 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 130 local tourist organisations. Assigned tasks include tourism promotion of designated areas and supporting and developing tourist information systems.

The Minister of Sport and Tourism established the Tourism Experts Council for tourism development in Poland. The Council, made up of experts and practitioners, is designed to support initiatives in favour of a sector that has been hit hard by the COVID-19 pandemic. 2022-23 will be a period of formulating new medium- and long-term programmes related to the transformation and development of tourism at the EU and national levels.

In 2021, the tourism budget was PLN 66.5 million, an increase of PLN 4.7 million compared to 2020, including PLN 56.1 million for the Polish Tourism Organisation. In addition, in 2021-27, specific tourism sector projects are being supported by EU structural funds, such as EU Green Deal.

Poland: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Sport and Tourism, 2022.

Tourism policies and programmes

The Programme for Tourism Development defined goals until 2020. The Ministry of Economic Development and Technology has initiated work on developing a new policy document for tourism. Work is currently underway to develop a forecast diagnosis for the strategy document. The most important challenges for the tourism sector are mitigating the impact of the pandemic and Russia's war in Ukraine and the related price and demand shocks.

The Programme aims to define the direction of the development and transformation of tourism, boost resilience in any future crises and enable the sector's continued development. The principles of sustainable development are an important element in all planned actions. The activities will include research and analysis, education and training, tourism product development and promotion support. Work is also underway on ensuring appropriate legislative solutions to assist these aims.

Poland is using the COVID-19 crisis as an opportunity to introduce innovations in tourism, accelerate the green transformation and make necessary regulatory changes. Financial support for the tourism sector has helped it to survive (see box below). In the short-term, substantive support and assistance in reconstruction helped the sector transition from a state of stagnation to full operational activity. Assistance in processing funds, training and strengthening competitiveness are priorities for the immediate future. Due

to rising prices, Poland has introduced solutions such as the so-called ‘anti-inflation shield’. Moreover, Poland conducts activities to reassure all tourists that it is a safe destination.

The recovery of tourism is based on:

- Sustainable development.
- Improving the competitiveness of SMEs, which are the foundation of the tourism sector.
- Research and transfer of knowledge, particularly using Big Data.
- Development and application of modern digital tools in tourism, in the spirit of green transformation.
- Using tourism as a tool for social and professional development, thereby offering opportunities to more marginal communities.

The pandemic required shifting priorities from long-term planning towards immediate actions supporting the sector. In the long term, 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 while respecting the principles of sustainable development. The approach focuses on a modern tourism management system, the process of digitalisation and training in tourism-related occupations.

Funding to support tourism businesses survive COVID-19 in Poland

Poland implemented a variety of support funds to help tourism businesses survive the COVID-19 pandemic. These included the following:

- Tourism Reimbursement Fund: a fund of roughly PLN 300 million in grants to more than 100 000 recipients, preventing many bankruptcies and stabilising the sector’s financial situation.
- Polish Tourism Voucher: a voucher which covered a single payment of PLN 500 for each child under 18 and a supplementary payment of PLN 500 for children with disabilities, to spend on hotels or tourist events services.
- Tourism Assistance Fund: a fund that provided tour operators loans in case of future cancellation of specific tour events in extraordinary and unavoidable circumstances.
- Support Programme for Local Government Units in Mountain Areas: a programme implemented to support local self-government units in mountain areas. Funds can be used for investments in the construction, extension, reconstruction and modernisation of tourist and municipal tourist infrastructure.
- Polish Health Resorts Programme: allocates funds of approximately PLN 250 million to support health resort municipalities. Government support will cover up to 98% of investment costs.

Statistical Profile

Poland: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	95 973	..	..	80 671
Overnight visitors (tourists)	45 952	47 736	50 018	38 570	46 278
Same-day visitors (excursionists)	..	48 237	..	..	34 393
Nights in all types of accommodation	214 207	224 767	233 660	182 815	220 111
Hotels and similar establishments	44 595	47 324	51 912	35 922	42 969
Other collective establishments	66 841	71 902	76 020	52 508	70 937
Private accommodation	102 772	105 541	105 728	94 385	106 206
Inbound tourism					
Total international arrivals	83 804	85 947	88 515	51 076	51 026
Overnight visitors (tourists)	18 258	19 623	21 158	8 418	9 722
Same-day visitors (excursionists)	65 546	66 324	67 356	42 658	41 304
Top markets					
Russia	875	919	955	238	..
Germany	6 504	6 704	7 067	3 426	3 630
Ukraine	1 360	2 038	2 596	1 021	1 496
Belarus	763	793	807	391	490
United Kingdom	851	919	1 002	360	389
Nights in all types of accommodation	113 202	122 065	131 988	57 306	64 531
Hotels and similar establishments	41 390	47 195	52 979	20 637	21 467
Other collective establishments	8 569	13 781	15 849	4 946	4 920
Private accommodation	63 243	61 089	63 160	31 723	38 144
Outbound tourism					
Total international departures	46 681	48 615	50 558	26 893	24 220
Overnight visitors (tourists)	11 958	12 747	13 545	6 187	6 813
Same-day visitors (excursionists)	34 723	35 868	37 013	20 706	17 407
Top destinations					
Germany	2 357	2 438	2 523	1 603	1 797
Croatia	684	703	..	432	492
Greece	..	752	857	..	451
Italy	1 000	1 055	1 114	393	383
Czech Republic	725	762	790	410	383
TOURISM RECEIPTS AND EXPENDITURE, MILLION PLN					
Inbound tourism					
Total international receipts	52 917	56 775	61 514	34 333	..
International travel receipts	47 983	50 613	53 802	31 975	..
International passenger transport receipts	4 934	6 162	7 712	2 358	..
Outbound tourism					
Total international expenditure	35 766	37 970	39 279	21 884	..
International travel expenditure	33 166	34 759	35 653	20 536	..
International passenger transport expenditure	2 600	3 211	3 626	1 348	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/n1d9py>

Poland: Enterprises and employment in tourism

	Number of establishments	Number of persons employed ¹				
	2021	2017	2018	2019	2020	2021
Total	..	..	..	..	..	..
Tourism industries	21 223	..	..	..	..	..
Accommodation services for visitors	9 942	193 663	195 675	208 257	195 539	..
Hotels and similar establishments	3 949	..	..	..	..	..
Food and beverage serving industry	7 332	..	..	..	..	..
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	..	..	..	..	..	..
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  <https://stat.link/ld5qan>

Poland: Internal tourism consumption

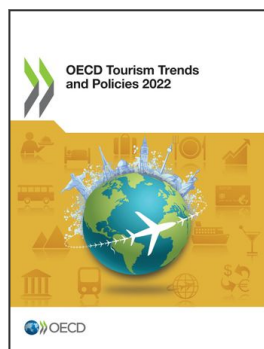
Million PLN

	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  <https://stat.link/b1pxfe>



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