












TOURISM IN WARSAW

REPORT 2015

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At the heart of Europe, Poland's capital stands out in terms of its intense growth and innovation. The city authorities support an active society and pro-environmental enterprises. Culture, arts and sports are open to all. Warsaw has proven that **sustainable development** is its priority.

Over the years, the Polish capital has become the **region's economic leader**, thereby strengthening its presence on the international stage. There has been an increase in investment in modern infrastructure and a growth in the number of business centres. Investors appreciate the business-friendly conditions on offer, which have translated into Warsaw's high position in league tables for business-friendly locations.

Warsaw is also an important point on the global meetings industry map. Undoubtedly, due in part to its modern airport, which continues to break records for numbers of passengers. Warsaw's prestige has also been strengthened by the many key international events organised here, drawing the world's attention to the capital of Poland.

The city of Chopin, however, not only concentrates on business but also on culture through the creation of a broad range of prominent events. These include outdoor festivals focused on bringing in large crowds as well as smaller concerts, performances and exhibitions. With each year, both the residents of Warsaw and **tourists have increasingly more to choose from in terms of how they spend their free time**. New museums, sports facilities and leisure spaces continue to appear, as well as a host of interesting and innovative ideas thanks to initiatives proposed by local activists as part of the participatory budget for Warsaw.

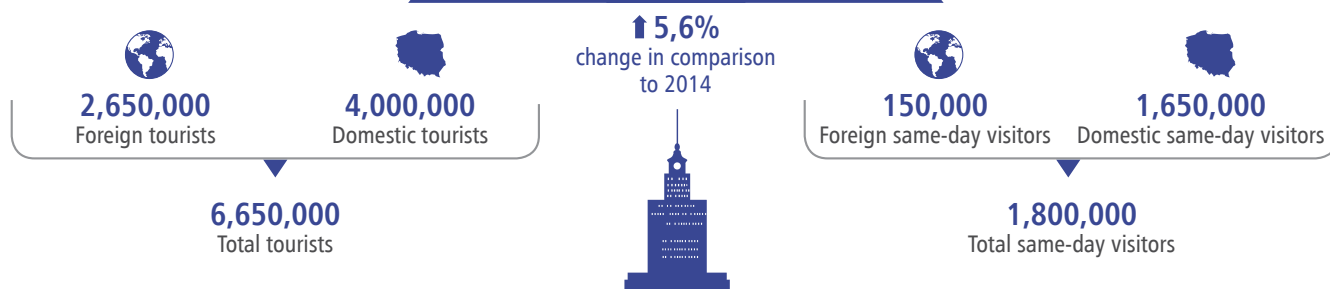
The city also knows how to take advantage of its location by the River Vistula, offering an increasing number of attractions for those who love nature, sports or just pure fun. The broad spectrum of cultural and leisure activities, the city's great and varied cuisine and accessible transport is available not only to those who live in or visit Warsaw's city centre, but also all city districts. The diversity and dynamic growth of Warsaw is why the number of tourists is increasing year on year.

Public opinion polls show that both foreign and domestic visitors to the city, as well as its residents, are all positive about the changing image of Warsaw. **Poland's capital city continues to modernise but remains friendly** both for – and thanks to – visitors and residents.

Estimated number of tourists and same-day visitors

8,450,000

Total tourists and same-day visitors



Foreign tourists and same-day visitors by country



Means of transport used by tourists coming to Warsaw

domestic | foreign



over
420
tourist accommodation
establishments including 81 hotels

over
36,000
bed
places



over
3 million
tourists have used tourist
accommodation establishments

over
5 million
nights spent
by tourists

Main purposes of visiting Warsaw

domestic | foreign



sightseeing

38% | 26%



visiting family
or friends

15% | 14%



rest

12% | 18%



learning about the culture,
history and local customs

5% | 15%



participation in
a cultural event

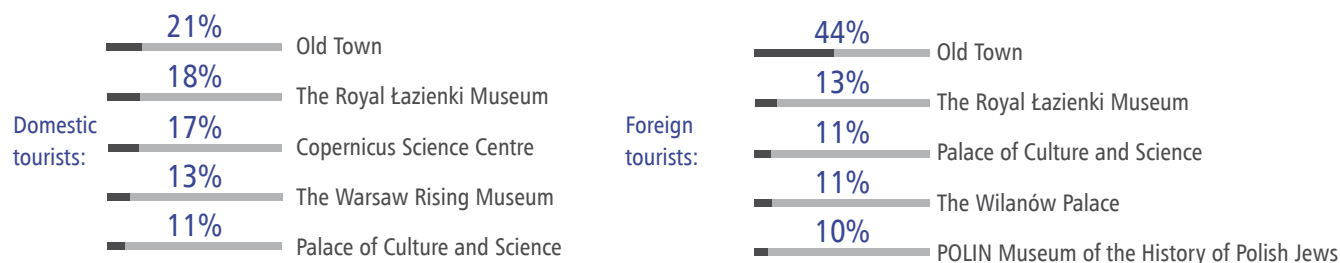
5% | 2%



business trip

4% | 7%

Top 5 tourist attractions



7.85
average tourist attractiveness of Warsaw
in the opinion of tourists
(on a scale of 1 to 10)



4 days
average stay

PLN 717

average declared amount
spent per person during stay



PLN 407
domestic tourists



PLN 1,542
foreign tourists

97% of domestic tourists and **85%** of foreign tourists
intend to
visit Warsaw again

95% of domestic tourists and **95%** of foreign tourists
are ready to recommend
a visit to Warsaw to their friends

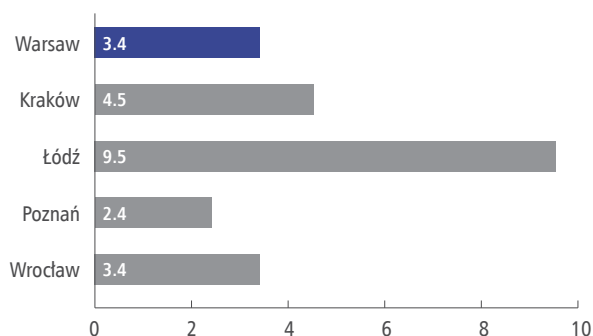


WARSAW – SELECTED SOCIAL AND ECONOMIC INFORMATION

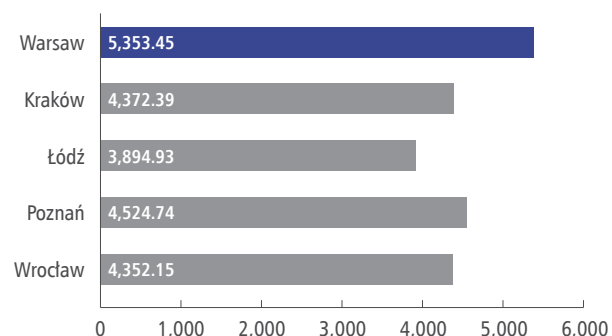


WARSAW COMPARED TO OTHER SELECTED CITIES^{2, 3, 4, 5, 6}

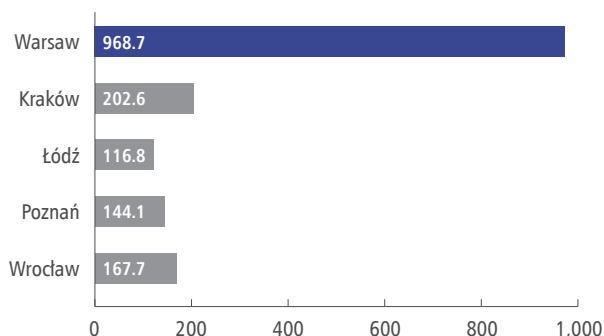
Registered unemployment rate
at the end of December 2015 (%)



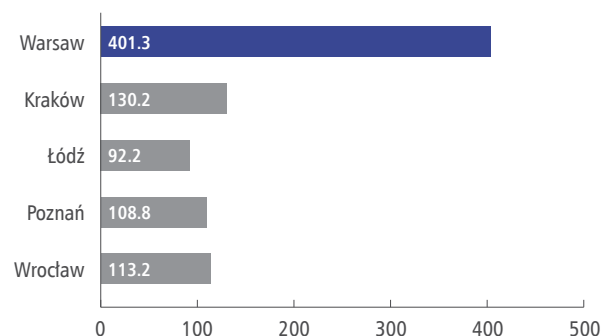
Average monthly gross wages and salaries
in enterprise sector in January-December 2015 (PLN)



Average paid employment
in enterprise sector in January-December 2015 (thousands)



Number of entities of the national economy in the REGON register
at the end of December 2015 (thousands)



WARSAW'S CREDIT RATING ACCORDING TO MOODY'S INVESTORS SERVICE⁷

A2 with stable outlook

- 9th year in a row
- the highest foreign credit rating of a local government in Poland (equal to the national rating)

2015 European Union Place Equity Index⁸

Ranking comparing quality of life, reputation
and competitive identity of EU cities

30th place
[8th place]
in the 'prosperity' category

E-REGI 2015. European Regional Economic Growth Index⁹

Ranking of European cities with the best
economic prospects

16th place

The Global Financial Centres Index 18¹⁰

Ranking of global financial centres

38th place
[1st place]
in the 'Eastern Europe
and Central Asia' category

fDi European Cities and Regions of the Future 2016/17. Rankings¹¹

Ranking of most attractive European locations
for future inward investment

'Major European Cities of the Future 2016/17'

4th place
in the 'business friendliness' category

6th place
in the 'cost effectiveness' category

8th place
in the 'human capital and lifestyle' category

8th place
in the 'FDI strategy' category

'Eastern European Cities of the Future 2016/17'

3rd place

fDi Polish Cities of the Future 2015/16¹²

Ranking of most attractive Polish cities
for future inward investment

1st place
in the 'overall' category

1st place
in the 'economic potential' category

1st place
in the 'business friendliness' category

1st place
in the 'human capital and lifestyle' category

1st place
in the 'connectivity' category

EMEA Investor Intentions Survey 2015¹³

Survey of investor intentions, from across the EMEA
(Europe, Middle East and Africa) property investment
community

10th place
in the list of cities that are seen by investors as most
attractive for making property investment purchases

Emerging Trends in Real Estate®. Beyond the capital. Europe 2016¹⁴

Forecasts and trends in the European real estate
market

17th place
in terms of real estate investment and development trends

Main Streets Across the World 2015/2016¹⁵

Global ranking of most expensive retail locations
by prime rental value in different countries

43rd place
Nowy Świat

5 most expensive retail locations
in Warsaw:

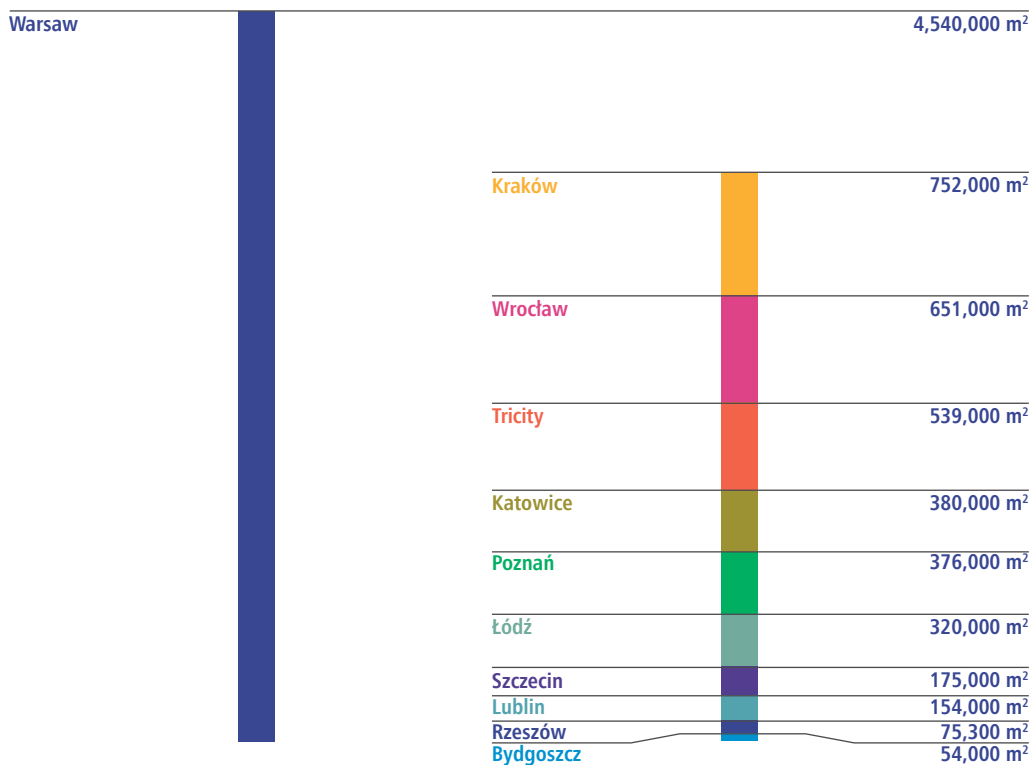
Nowy Świat
Chmielna
Marszałkowska
Trzech Krzyży
Jerozolimskie

OFFICE SPACE IN WARSAW

| | | | | | |
|---|--|---|--|---|---|
| 4.66 million m ² | nearly 278,000 m ² | 24 euro/m ² /month | 13-16.5 euro/m ² /month | nearly 837,000 m ² | nearly 283,000 m ² |
| modern office space at the end of Q4 2015 | office space handed over for use in 2015 | maximum rent for best office space in city centre | average rent for best office space outside city centre | total area rented – best result ever in rental market (growth by 37% in comparison to 2014) | net absorption – best result in history (growth by 56% in comparison to 2014) |

Source¹⁶

Available office space in Warsaw in comparison to other selected cities at the end of Q2 2015¹⁷

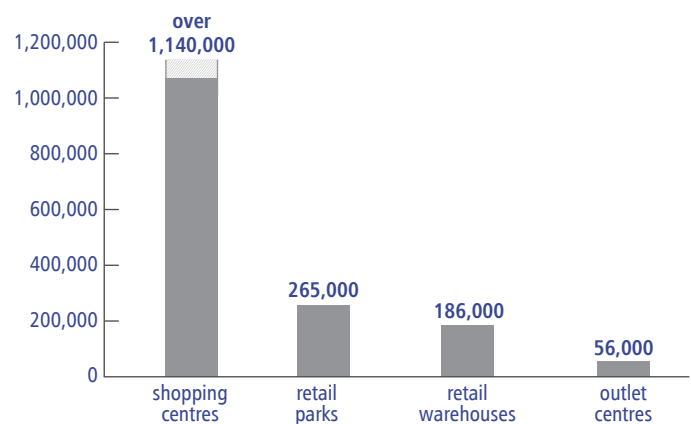


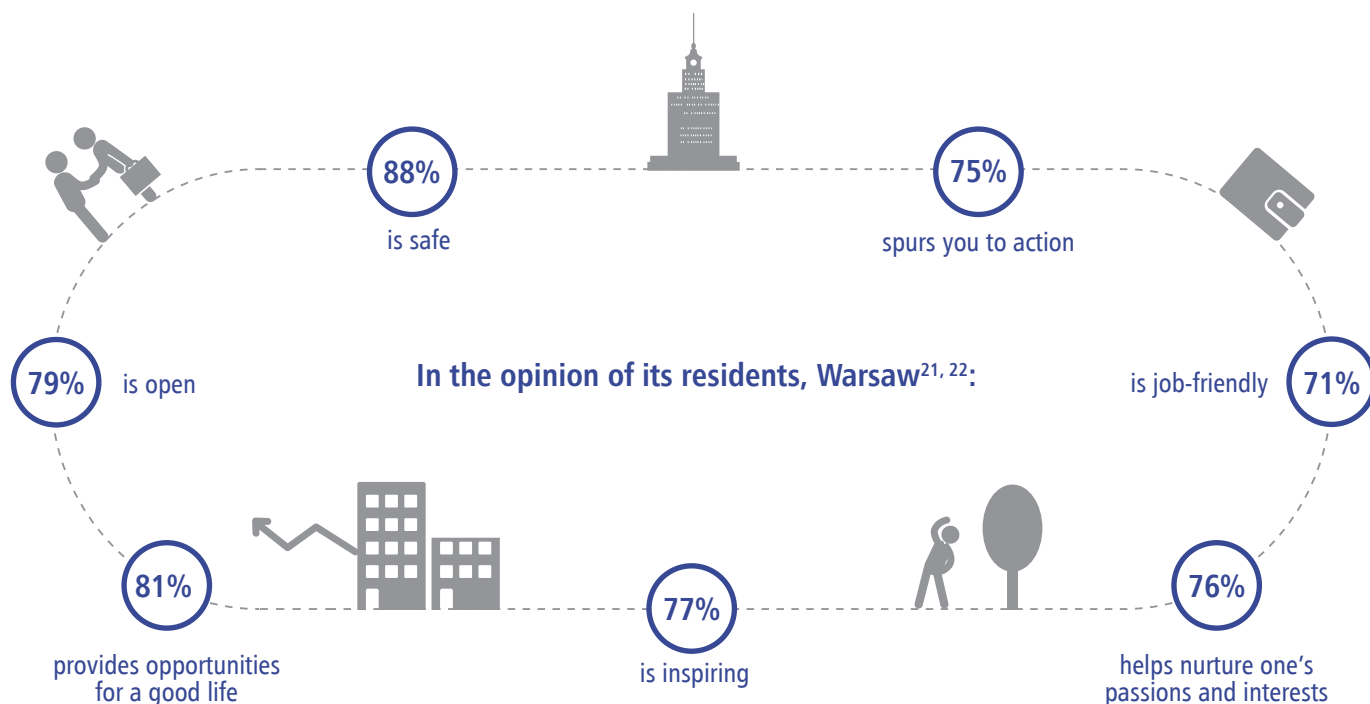
RETAIL SPACE OF THE WARSAW AGGLOMERATION

| | |
|---------------------------------------|--|
| 1.65 million m ² | 64,000 m ² |
| retail space at the end of Q4 2015 | retail space handed over for use in 2015 |

Source^{18, 19}

Retail space by retail formats (m²)¹⁹





In the 2014/2015 academic year²³:

there were **approx. 70** public and non-public institutions of higher education in Warsaw

approx. 260,000 students attended public/non-public institutions of higher education offering Masters Degree courses

15th place²⁴

in the world among cities attractive for people aged 15-29



Warsaw is:

the location of one of **5 Google Campus** sites for startups in the world²⁶



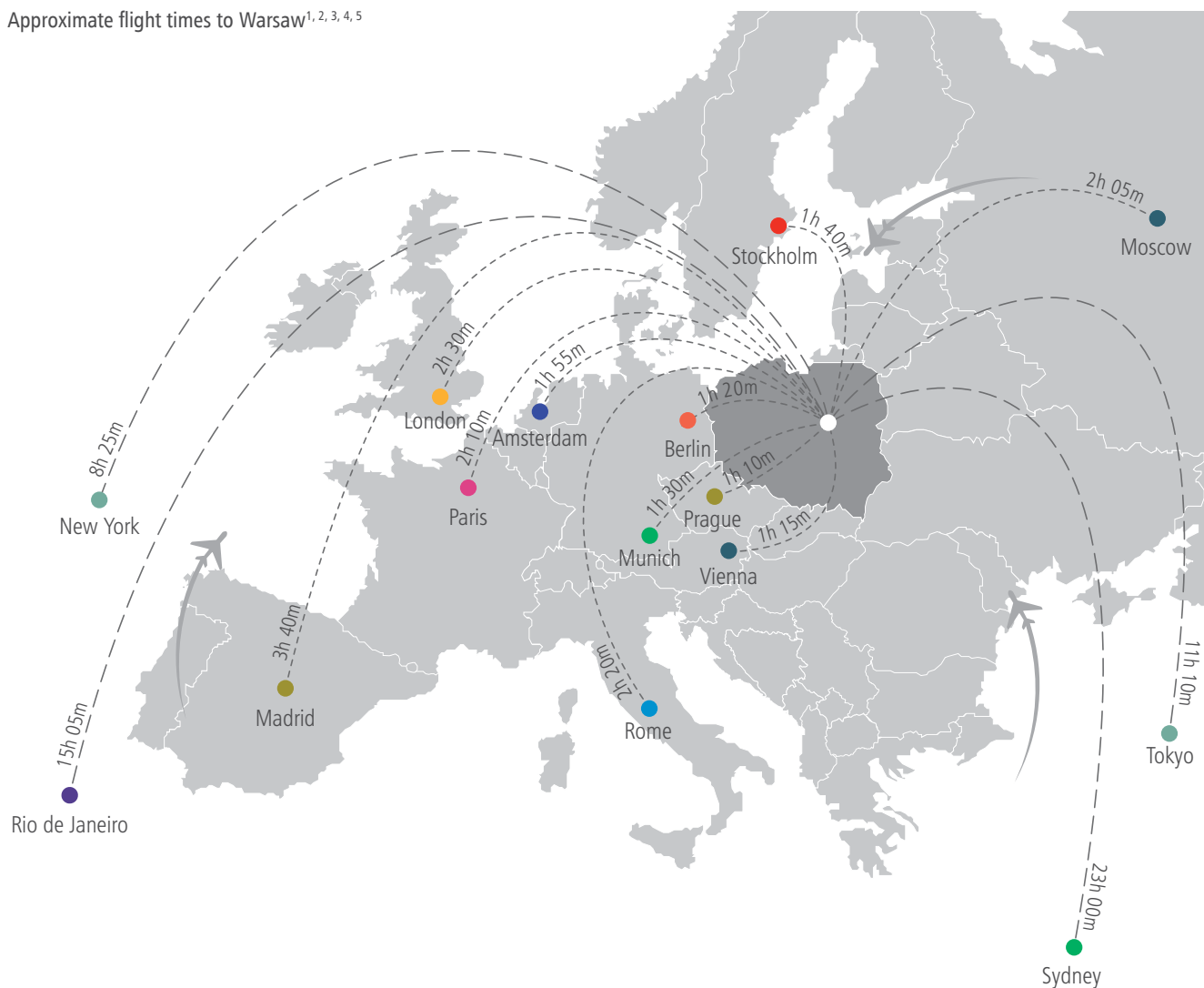
the main sponsor of **Bitspiration** – the biggest conference for startups in Poland²⁵



ACCESSIBILITY

AIR

Approximate flight times to Warsaw^{1, 2, 3, 4, 5}



WARSAW CHOPIN AIRPORT

11.2 million



passengers served

**approx.
124,700**



flight operations performed

175



destinations

37%



of Polish air market share

Source^{6, 7, 8}

Distance from the centre of Warsaw⁹

approx. 10 km



Approximate travel time from airport to Warsaw centre¹⁰

car/
taxi



Rapid
Urban
Railway



bus



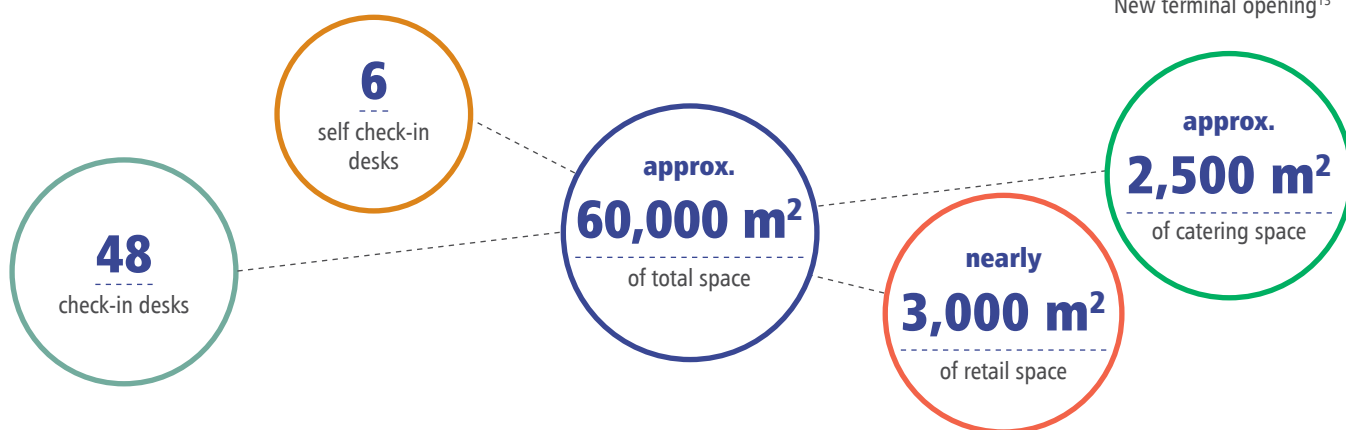
Best airport in Poland according to
a *Business Traveller Poland* magazine poll¹¹

Best Airports in Europe 2015¹²

Ranking comparing European airports
in terms of facilities for passengers

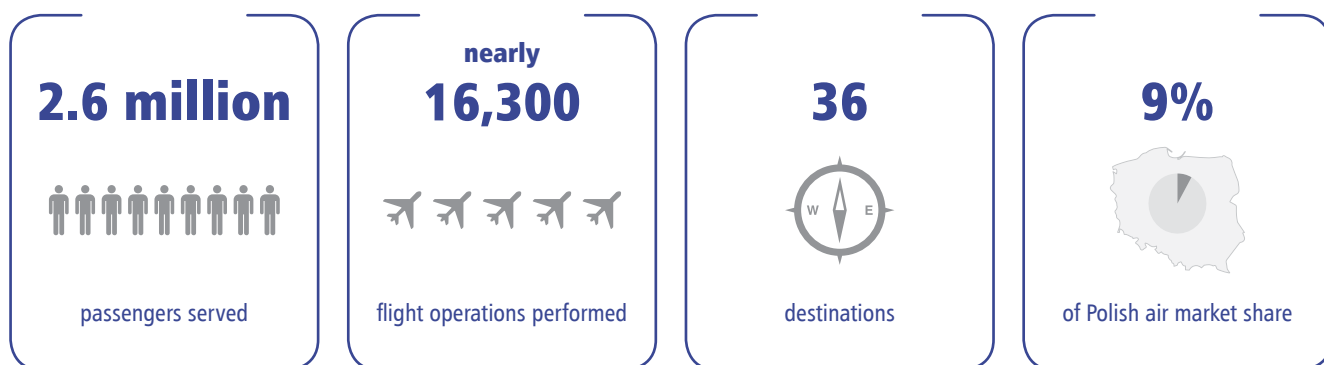
10th place

New terminal opening¹³



approx. **90%** of take-offs were on time – the best result in the world among medium-size airports¹⁴

WARSAW MODLIN AIRPORT



Source^{8, 15}

Distance from the centre of Warsaw¹⁶



approx. 36 km

Approximate travel time from airport
to Warsaw centre^{10, 17}



car/taxi/bus



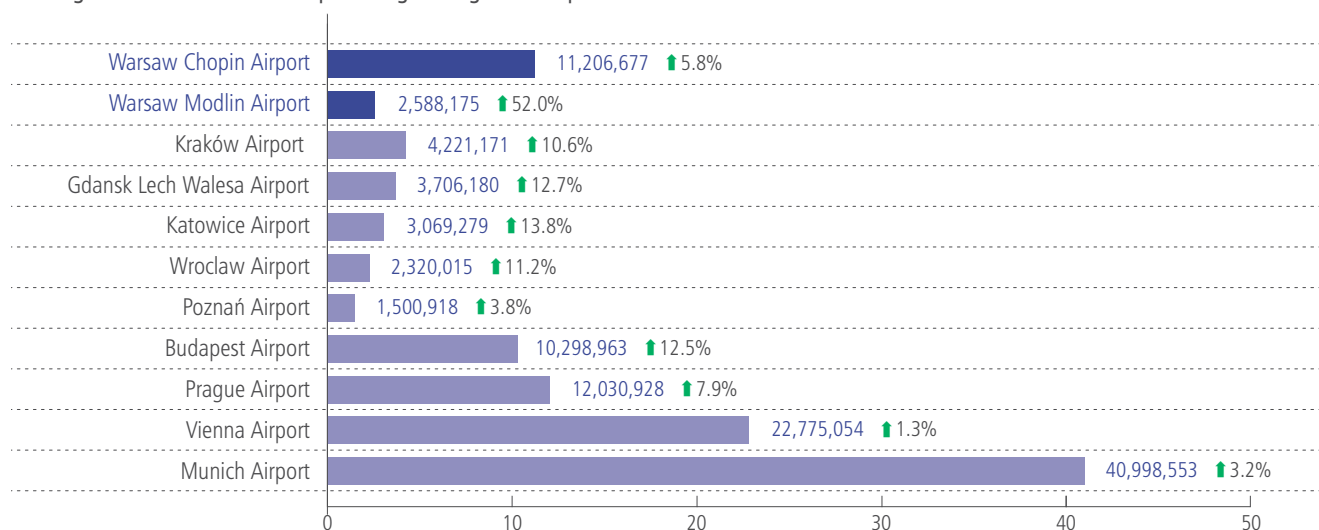
The fastest growing airport in Europe according to prestigious analytical service *anna.aero*¹⁸



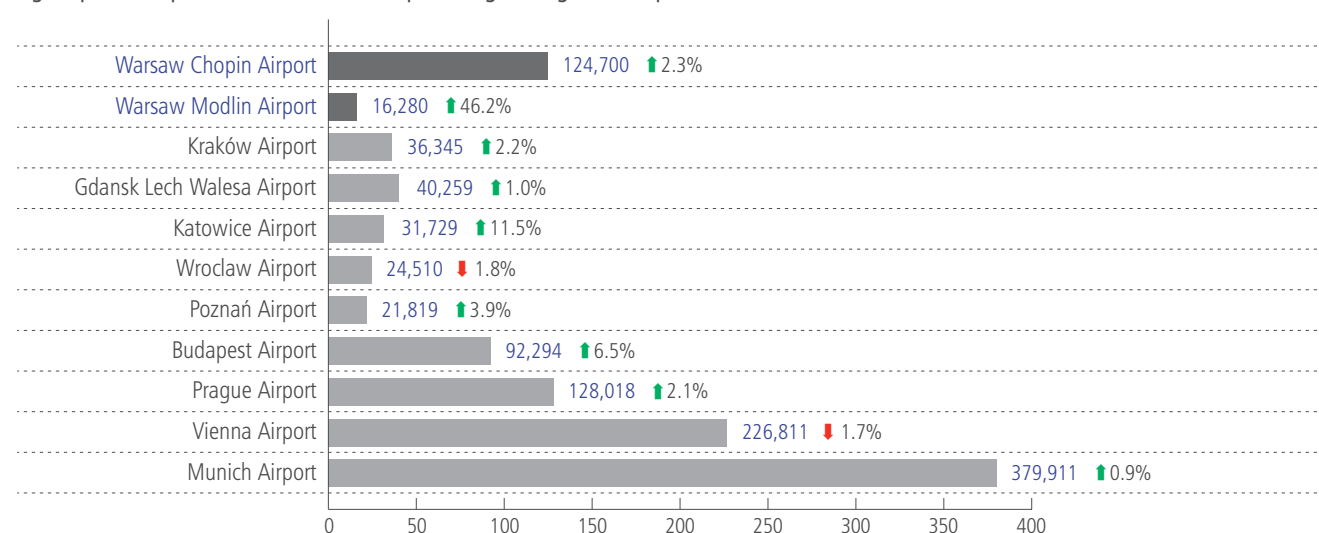
Opening of new **SKYLounge** business lounge for passengers expecting highest quality service¹⁹

WARSAW CHOPIN AIRPORT AND WARSAW MODLIN AIRPORT IN COMPARISON TO OTHER SELECTED AIRPORTS

Passengers served – number and percentage changes in comparison to 2014



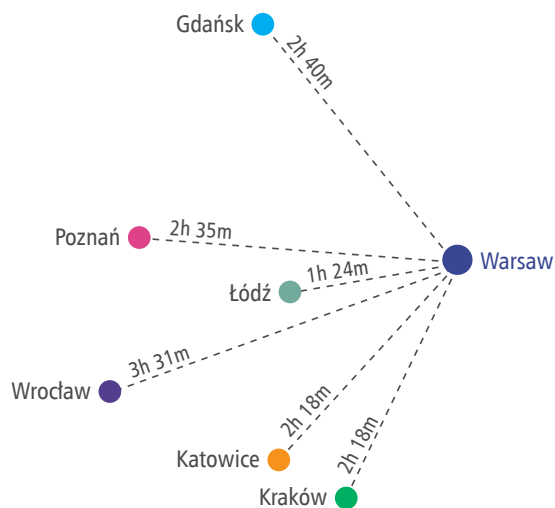
Flight operations performed – number and percentage changes in comparison to 2014



Source 6, 7, 15, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29

RAIL

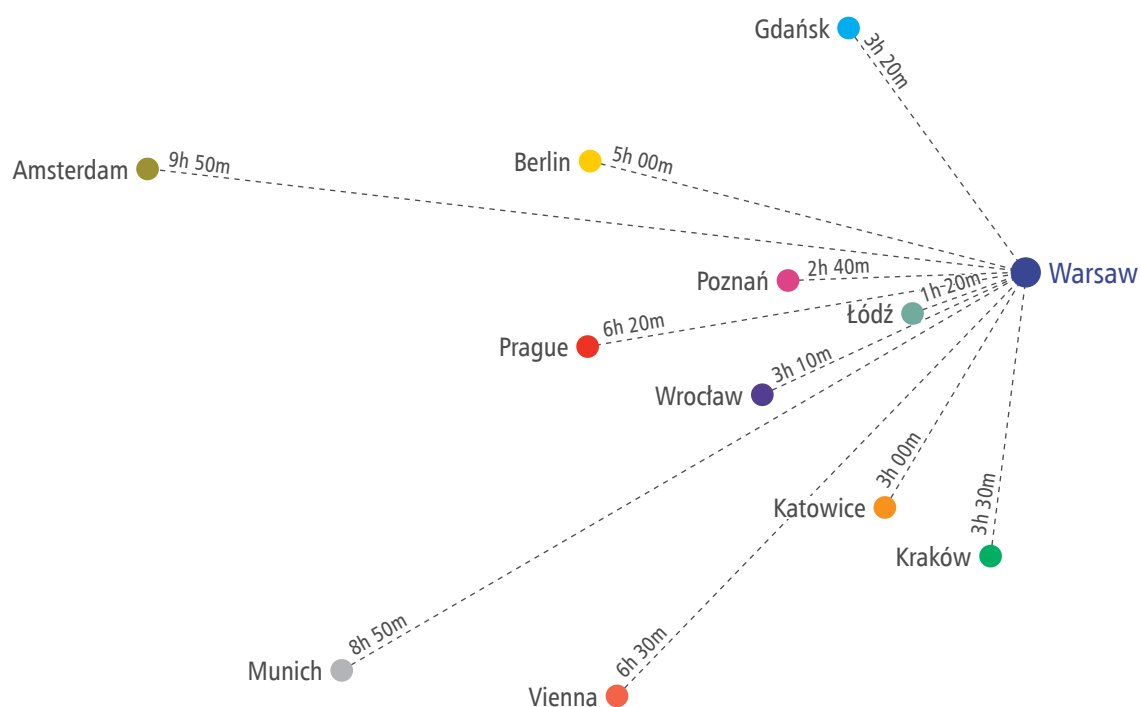
Travel time to Warsaw³⁰



Selected connections by PKP Intercity – growth in number of passengers³¹

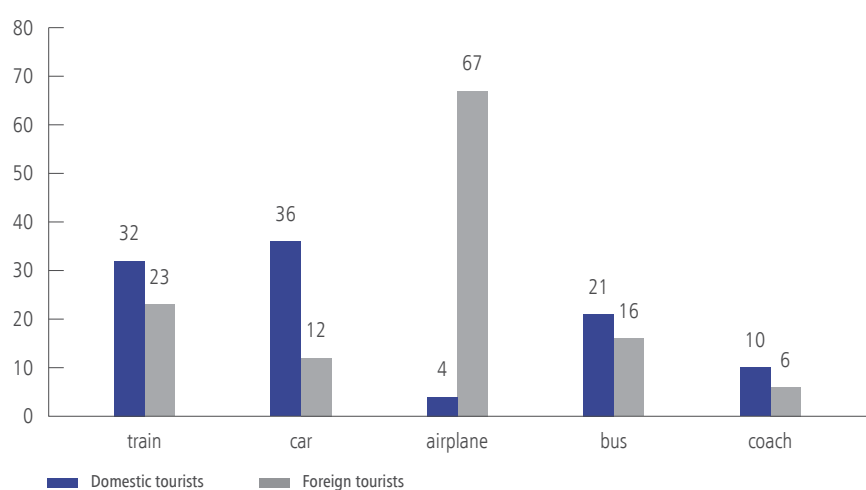


Approximate travel time to Warsaw

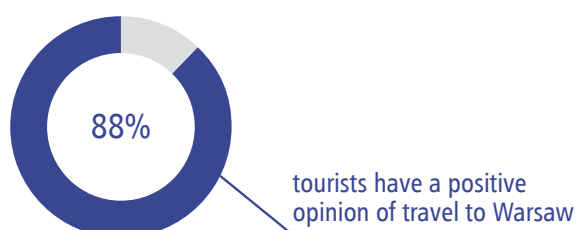


MEANS OF TRANSPORT USED BY TOURISTS COMING TO WARSAW³²

Means of transport used by tourists coming to Warsaw (%)*



*total percentage data is over 100% as respondents could indicate more than one means of transport





TOURIST ACCOMODATION



over
420
tourist accommodation
establishments*

*based on data supplied by the City of Warsaw
and the Ministry of Sport and Tourism

Source¹



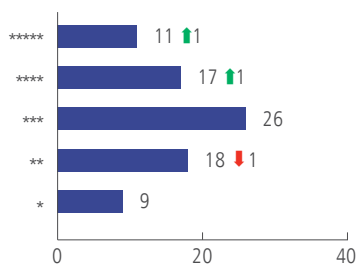
over
36,000
bed
places*

*based on data supplied by the City of War-
saw and the Ministry of Sport and Tourism

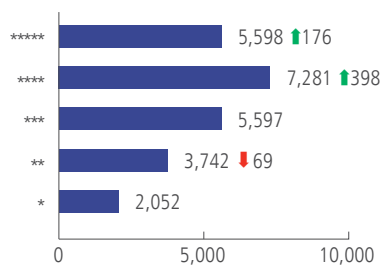
HOTELS*

*based on data supplied by the City of Warsaw and the Ministry of Sport and Tourism

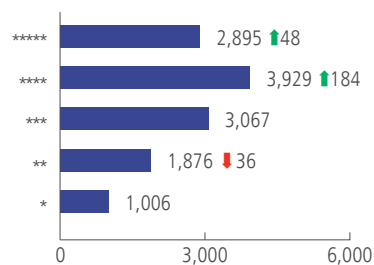
Establishments by category – number
and change in comparison to 2014¹



Bed places by hotel category – number
and change in comparison to 2014¹



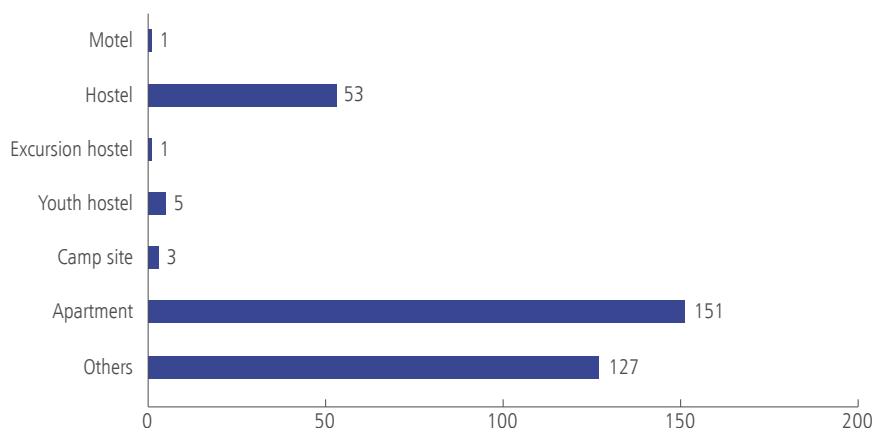
Rooms by hotel category – number
and change in comparison to 2014¹



OTHER TOURIST ACCOMMODATION ESTABLISHMENTS*

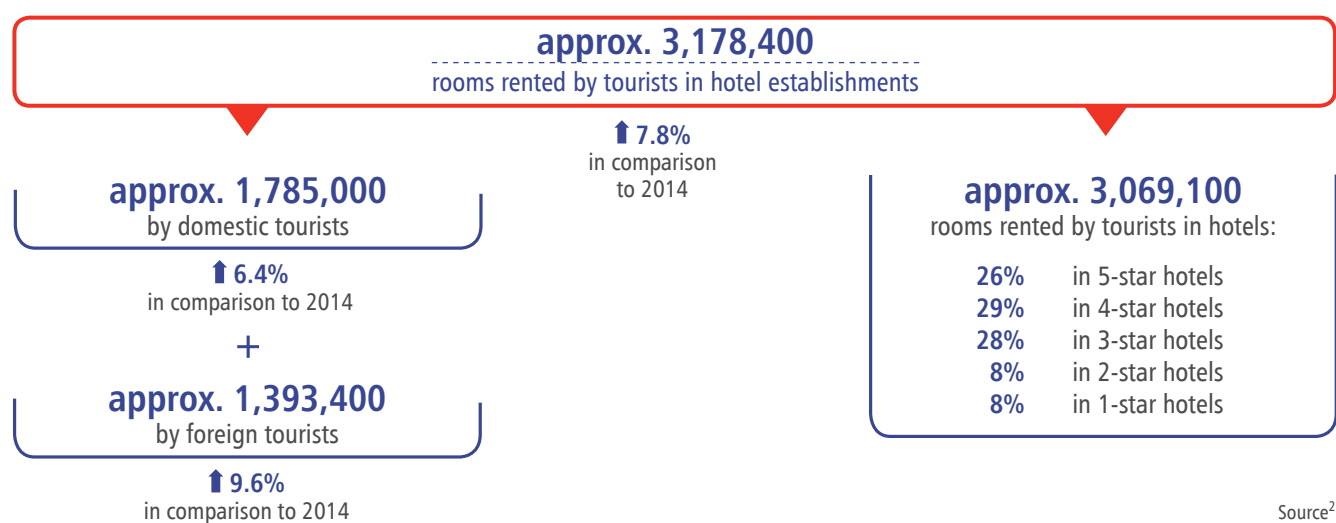
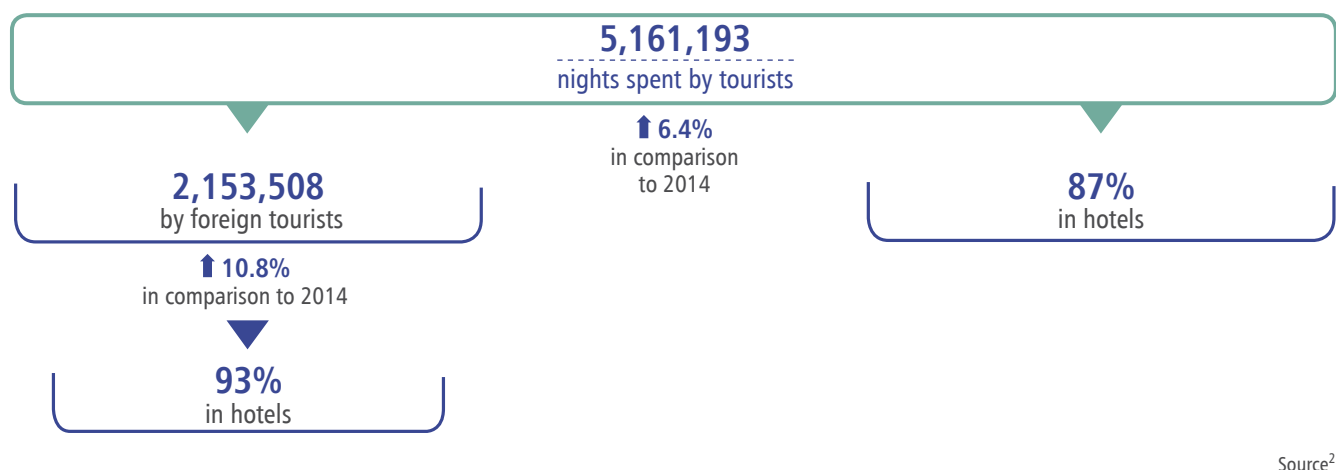
*based on data supplied by the City of Warsaw and the Ministry of Sport and Tourism

Number of establishments¹



USE OF TOURIST ACCOMMODATION ESTABLISHMENTS*

*data from establishments that submitted reports to the Central Statistical Office [GUS]

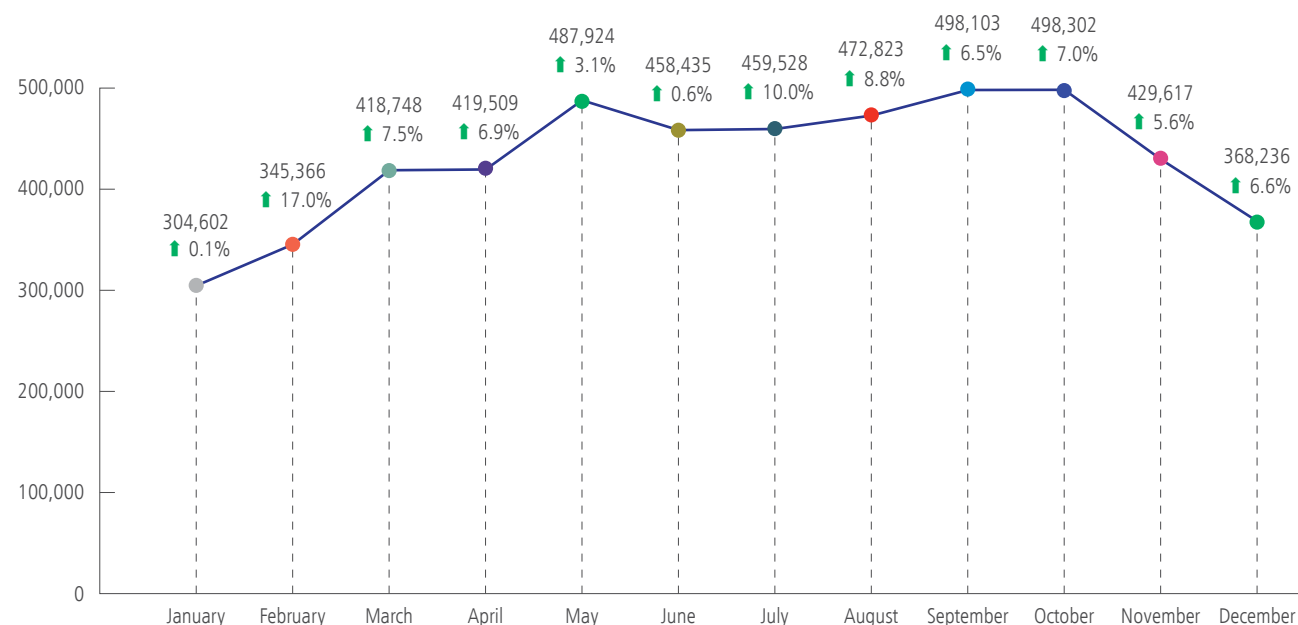


Occupancy

- ▶ 69% in hotel establishments (3.5 pp more than in 2014)
- ▶ 71% in hotels, with peak times in:
September (83%), October (80%) and May (79%)

Source²

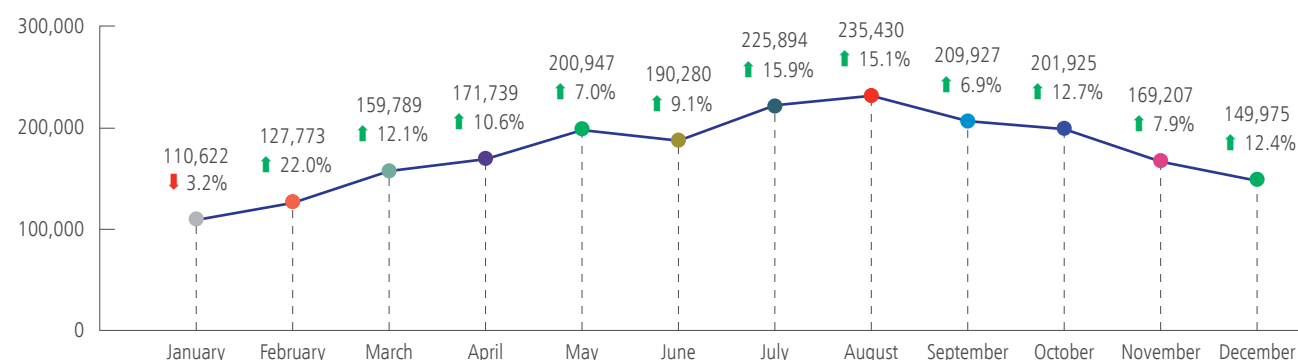
Nights spent by tourists by months – number and percentage change in comparison to the corresponding period in 2014*



*data from establishments that submitted reports to the Central Statistical Office [GUS]

Source^{3, 4, 5, 6}

Nights spent by foreign tourists by months – number and percentage change in comparison to the corresponding period in 2014*



*data from establishments that submitted reports to the Central Statistical Office [GUS]

Source^{3, 4, 5, 6}

1.7
day

average duration of stay by tourists
in accommodation establishments
(1.9 days for foreign tourists)*

*data from establishments that submitted reports
to the Central Statistical Office [GUS]

1st
place

in Poland in terms of nights spent by tourists
(5.2 million), ahead of Kraków (4.6 million)
and seaside Kołobrzeg county (4.3 million)*

*data from establishments that submitted reports
to the Central Statistical Office [GUS]

41st
place

in Poland among counties and county towns
in terms of the number of nights spent
per number of residents*

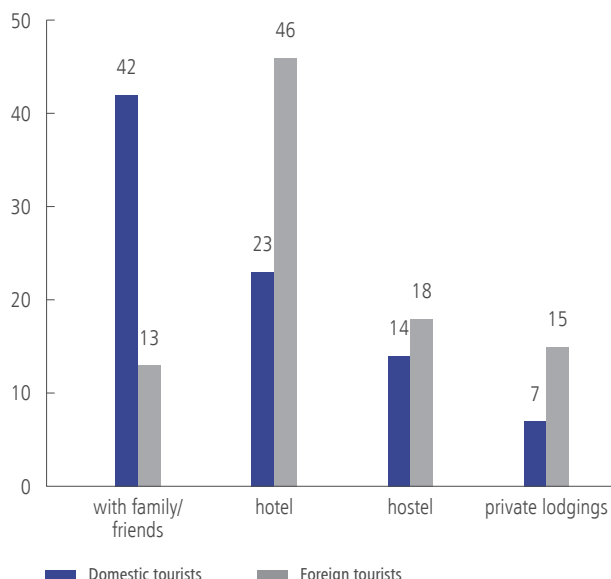
*data from establishments included in the report

Source^{2, 7}



90% of tourists visiting Warsaw stay the night in the city⁹

Most popular form of accommodation for tourists (%)⁹



↑ **9.3%**

increase in the average RevPAR of hotel rooms
(revenue per available room)*

*data for January-July 2015 in reference
to the corresponding period in 2014

↑ **1.8%**

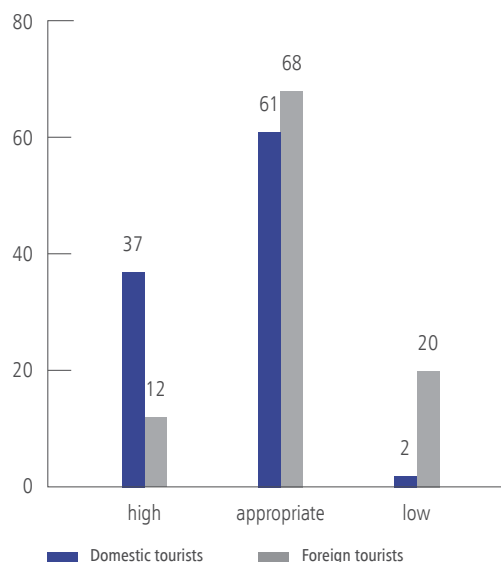
increase in the average ADR of hotel rooms
(average daily rate)*

*data for January-July 2015 in reference
to the corresponding period in 2014

Source⁸



Value for money of accommodation services in the opinion of tourists (%)⁹



Hotel Intercontinental was the only one in Poland to receive **5 out of 5** possible symbols for the building (determining the level of services offered) in the **'Main Cities of Europe' Michelin Red Guide**.

14 hotels from Warsaw out of a total of 1,537 were described in the review guide. The Michelin reviewers additionally singled out the atmosphere of two other Warsaw hotels – **Le Régina** and **Rialto**.

Source¹⁰

Kraków – PLN 265
Gdańsk – PLN 248



Wrocław – PLN 239
Poznań – PLN 235

Source¹¹



TOURIST ATTRACTIONS

SELECTED ATTRACTIONS – FACTS AND NUMBERS

The Royal Łazienki Museum in Warsaw^{1, 2, 3}



2.1 million

visitors

The Palace on the Isle and its surroundings, now restored after a three-year long conservation project which was given the Sybilla 2015 award in the 'Conservation and protection of cultural heritage' category

Over 300 performers at the Zone of Silence Music Festival – music, beautiful gardens and 18th century architecture

Museum of King Jan III's Palace at Wilanów^{4, 5, 6}



2.4 million

visitors

Multimedia shows, classical music and light mapping – the Wilanów garden once again has been transformed into the Garden of Light

The interiors, including the Banquet Hall of King John III, are now in the process of being renovated and adapted for visitors with disabilities

National Museum in Warsaw^{7, 8}



approx. 338,000

visitors

Close to 104,000 people visited the 'Olga Boznańska (1865-1940)' temporary exhibition – which is the largest turnout in recent years

The museum has been awarded the 'Senior-Friendly' certificate

The Royal Castle in Warsaw – Museum^{9, 10}



approx. 670,000

visitors

Opening of unique temporary exhibitions: 'Napoleon and Art' presenting the artistic achievements of Napoleonic France, as well as the 'New Gallery of Polish Kings and Princes. Świerzy versus Matejko' with a collection of modernised portraits of Poland's rulers

The renovated Upper Garden has been opened to the public

The Warsaw Rising Museum^{11, 12}



approx. 684,000

visitors

A record number of internet visitors at the exhibition prepared for the Google Cultural Institute for the 70th anniversary of the end of World War II – over 140,000 people from all over the world visited it in a single weekend

Another precious exhibit has come to the museum – the remains of the Liberator airplane found in Lake Kamionkowskie

POLIN Museum of the History of Polish Jews^{13, 14}



approx. 578,000

visitors

Thousands of people celebrated the first anniversary of the permanent exhibition

The museum was presented with the Superbrands award of Culture.pl – the first institution to win it in the history of the award

The Fryderyk Chopin Museum in Warsaw^{15, 16, 17}



approx. **85,000**

visitors

The Fryderyk Chopin Institute has been presented with a Pleyel piano autographed by Fryderyk Chopin

The ChopinPASS has been introduced – an entry package to the museum and to Fryderyk Chopin's Birthplace in Żelazowa Wola with direct transfer between the sites

Museum of Technology and Industry^{18, 19}



approx. **117,000**

visitors

The opening of the 'Broadcasting Through Communist Times' exhibition, presenting artefacts such as old radios and gramophones

The PIXELOZA Festival of Old Programming offering visitors the opportunity to play old computer games

Centre for Contemporary Art Ujazdowski Castle^{20, 21}



approx. **138,000**

visitors

Opening of a temporary exhibition presenting one of the most prominent Polish artists – Natalia LL

A garden of migrating plants was established as part of a summer project titled THE JAZDÓW ARCHIPELAGO

Zachęta – National Gallery of Art^{22, 23}



approx. **128,000**

visitors

Opening of the temporary exhibition: 'Canibalism?' about Appropriation in Art' about borrowed motifs in art

Opening of the temporary exhibition 'Just After the War' on the influence of social moods and political tensions in art

Copernicus Science Centre^{24, 25}



1.2 million

visitors

Opening of the free permanent educational exhibition 'Look: there's the Earth!' presenting the Earth and the universe through the eyes of astronauts

Crowds of guests at the astronomy events in Discovery Park – including approx. 12,000 participants for the Night of Shooting Stars

PGE Narodowy Stadium^{26, 27}



2.0 million

visitors

Record year – over 500 events at the stadium, including 'Kings on Ice' – a show on ice performed by the world's best ice-skaters, including Olympic champions

Europa League Final – Spain's Seville played Ukraine's Dnipro Dnipropetrovsk in the final of one of Europe's most important football competitions

Palace of Culture and Science^{28, 29, 30}



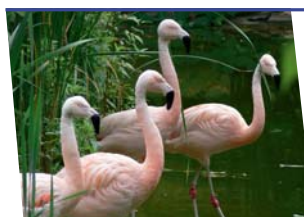
approx. **558,000**

visitors

Palace of Culture and Science celebrated its 60th birthday. A special project titled 'Play Tetris in the windows of the Palace' won the competition for 'Best Events of the Summer of 2015' organised by Brief for Poland

The first city apiary was set up on the roof of The Studio Theatre at the Palace for International Bee Day

City Zoological Garden in Warsaw^{31, 32}



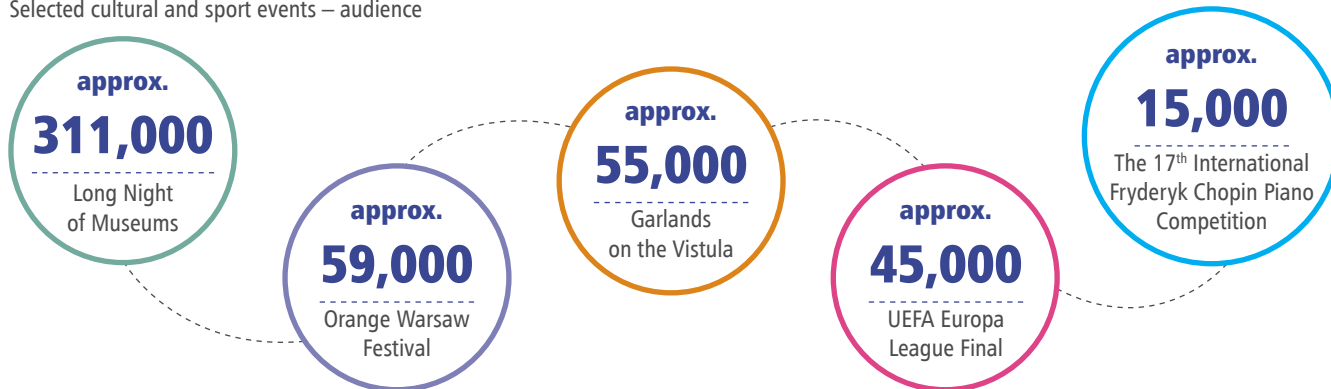
approx. **683,000**

visitors

The New Aquarium and a record number of animals: Warsaw Zoo already has as many as 3,796

Opening of the newly restored historical villa of the Żabiński family

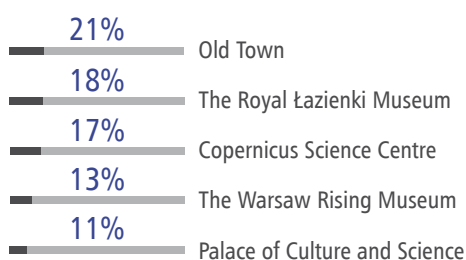
Selected cultural and sport events – audience



Source^{33, 34, 35, 36, 37}

Top 5 tourist attractions in Warsaw³⁸

Domestic tourists:



Foreign tourists:

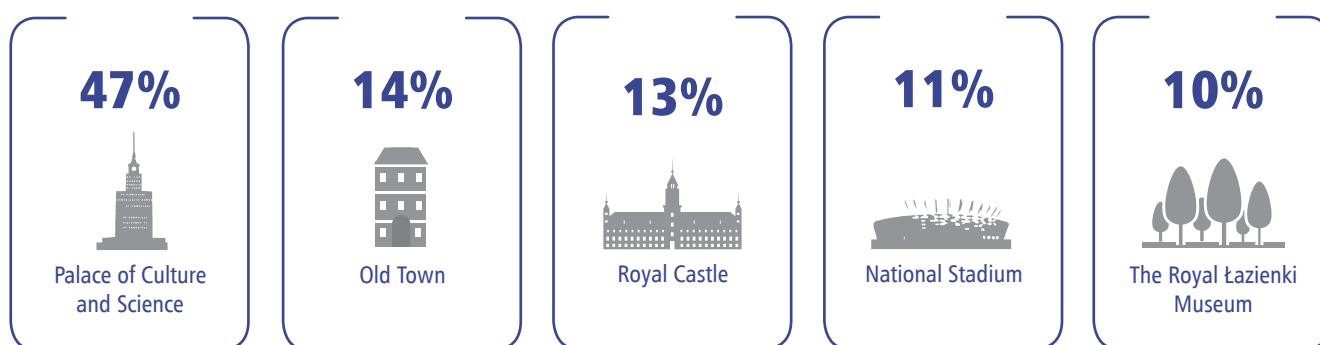


Something new on Warsaw's tourist map^{39, 40}

Museum of Warsaw's Praga district

- ▶ an institution protecting the heritage of Warsaw's famous district which lies along the right bank of the Vistula
- ▶ one of the first ever museums located on this side of the river

Selected sites, architectural complexes or buildings best associated with Warsaw by residents*



*respondents could indicate more than one site, architectural complex or building

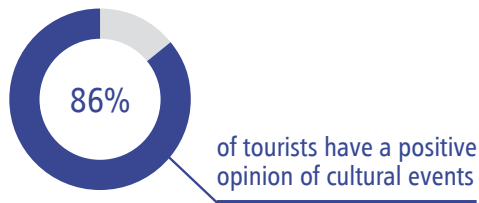
Source⁴¹

Top 3 most popular places in Warsaw on Instagram under #warsaw⁴²

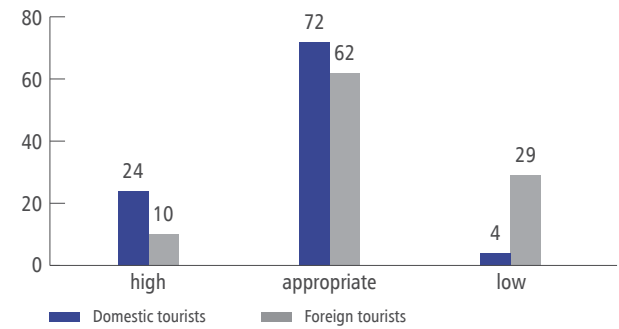


- 1 Palace of Culture and Science
- 2 Old Town
- 3 The Vistula

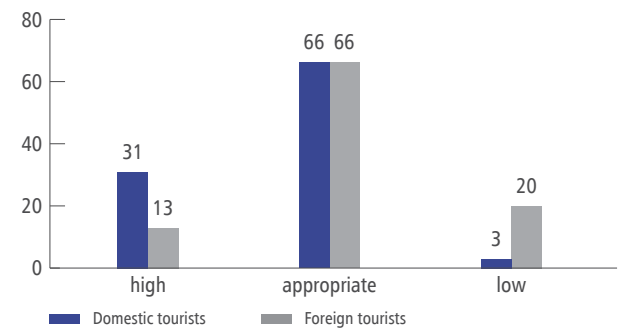
23rd place #warsaw and
34th place #warszawa
on Polish Instagram



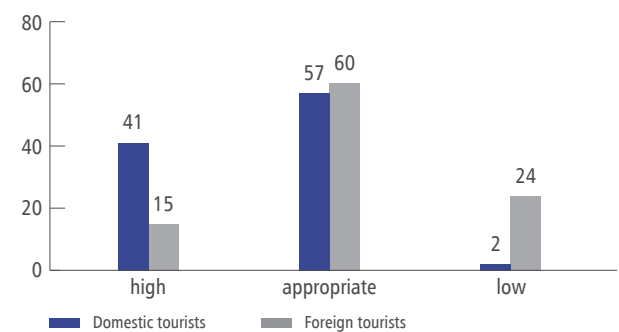
Value for money – price of cultural events (%)



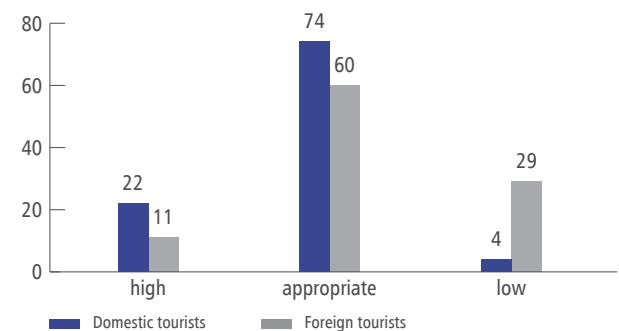
Value for money – price of sport events (%)



Value for money – price for entertainment (clubs, pubs, discos) (%)



Value for money – price for tourist guide services (%)





GREEN WARSAW

GREEN AREAS

44%

share of green areas*
in total city area

*forests, parks, squares,
allotment gardens, etc.

Source¹

20%

share of green areas*
in downtown area

*forests, parks, squares, allotment gardens, etc.

approx. 15%

forests
in total city area

(including natural reserves,
such as Bielański Forest, Kabacki Forest)

27



city forest
complexes

Source^{1,2}

95



parks
(average park area
– 10.6 ha)

2,248



trees
– natural monuments



over **19,000** trees and **40,000** bushes planted in 2015 in areas under the management of the City of Warsaw²



76%

of residents see Warsaw
as a green city³

88%

of residents have a positive opinion
of the state of greenery in the city⁴



Warsaw is a unique city in terms of its nature. Warsaw boasts a **large and semi-wild river** running through it, the Vistula. What is more, it is one of only two capitals in the world bordering a national park. The Kampinoski National Park (accessible by Warsaw public transport) is a remarkable place where city residents and visitors like to spend their time for rest and recreation. It has also a positive impact on the city as **the 38-hectare forest supplies Warsaw with clean air**. Importantly, as many as 79% of city residents live not farther than 300 metres from green urban areas of at least 5,000 m² in size.

Another positive landmark are Warsaw's green areas which are more than just wild stretches by the river. The downtown area, the oldest urbanised part of the city, has a number of historical parks from different eras, representing different fashions and styles:



The range of green areas, in particular in the summer time, is extremely broad both for those who like to spend their time actively, as well as for those who enjoy culture and the arts. There are an abundance of varied outdoor events: workshops (educational, artistic and other), music, theatre and dance events, as well as outdoor games and sports competitions. **The Chopin concerts** in The Royal Łazienki Park are part of Warsaw's summer traditional events. There are also **164 outdoor gyms** located in the many green areas of the city.

Source^{1, 5, 6}

In the past, this title was bestowed upon cities such as Stockholm, Hamburg, Copenhagen and Ljubljana, which were assessed for their local contribution to the prevention of global climate change, the vastness of their green areas as well as nature protection and biodiversity, eco-innovation and environmental management at the local government level.

Warsaw is a candidate for the title of 2018 European Green Capital



Source⁵

Selected events organised in Warsaw in 2015 as part of its participation in the 'Partnership for Climate' platform



Earth Day

bringing together thousands of participants



Earth Hour

in which the illuminations of the city's landmark buildings were turned off



World Water Day

organised under the auspices of the UN



Educational Climate Picnic

presenting activities as part of the 'Partnership for Climate' platform



Tree Day

a joint planting of greenery with the aim of increasing environmental awareness in society



Car-Free Day

popularising alternative means of transport, such as bicycles



Warsaw Energy Day

promoting the idea of smart cities as part of the EU Sustainable Energy Week



Warsaw Recycling Days

popularising the idea of selective waste collection

Source⁷



WARSAW BY BIKE

Warsaw's **Veturilo** public bike system is one of the seven largest and one of the most popular systems of public bicycle rental in Europe



every 10 sec

how often a Veturilo bike was rented on average

how often a new Veturilo user was registered on average

every 4 min

15,955

the daily record number of rentals

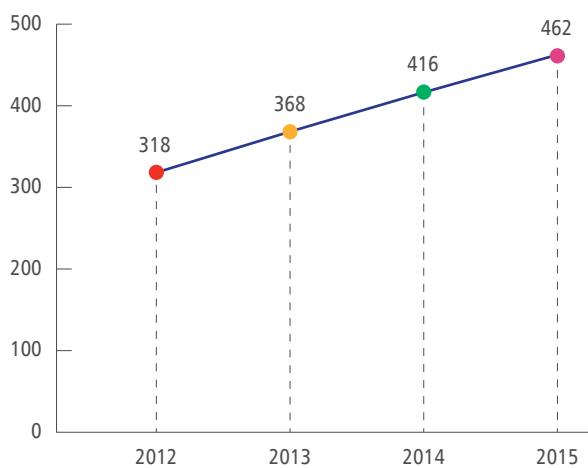


Out of a total of **3,039** bicycles, **10** are **tandem bikes** and **10** are **bikes for children** as part of the world's first child bike rental scheme called **Veturilko**

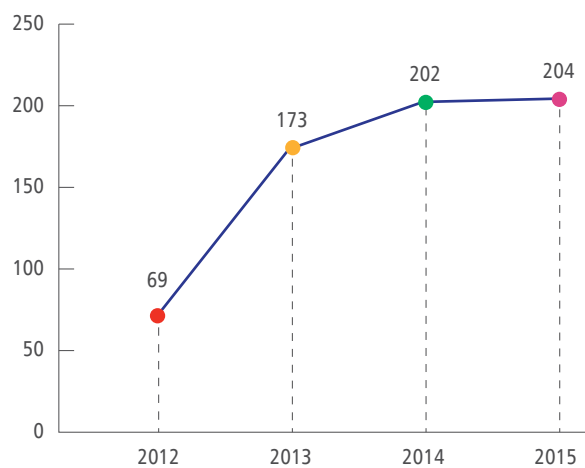
Source⁹



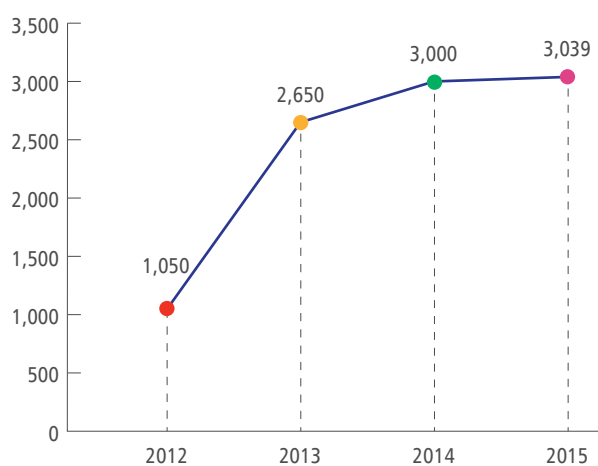
Total distance of bicycle network in 2012-2015 (km)¹



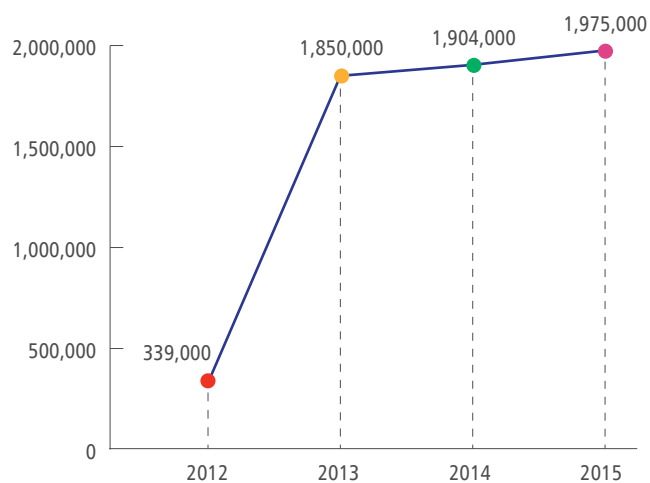
Number of Veturilo bike rental stations in 2012-2015¹



Number of Veturilo bikes for rent in 2012-2015¹



Number of Veturilo bike rentals in 2012-2015¹





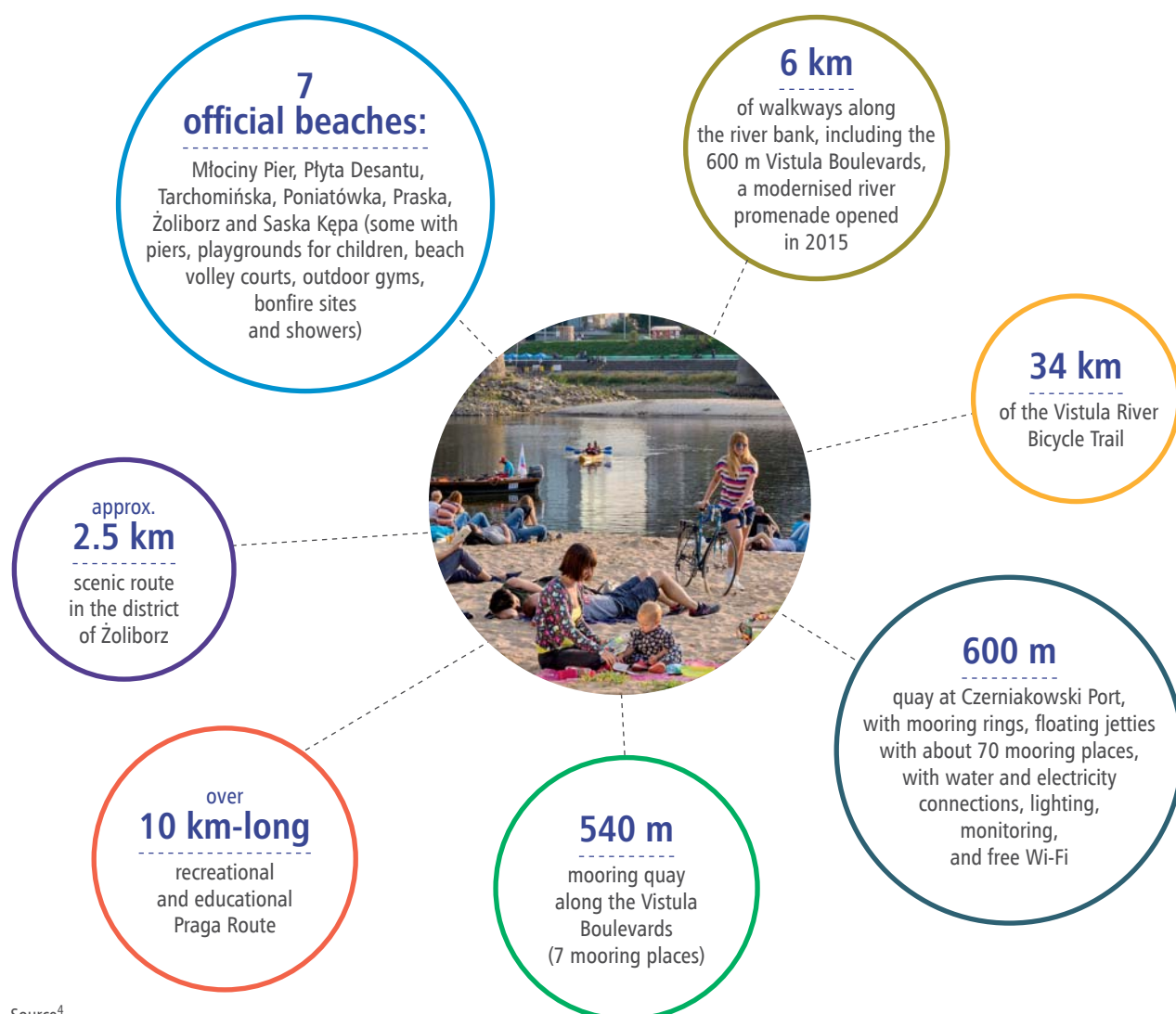
WARSAW'S RIVER VISTULA

The Vistula is a large, semi-wild river, the central part of which runs through Warsaw. It stretches through the city for **28 km**. Its right bank is kept in its natural state and has no hydraulic structures along a fragment of almost 4 km, which is truly unique in Europe considering the size of the city. This area is a part of the **Natura 2000** network which manages different bird habitat protection mechanisms and alluvial meadow restoration projects. Archipelagos of islands, islets and backwaters make it easier for mammals to cross the river. The capital's residents and Warsaw tourists also have the opportunity to see rare and protected mammal species such as beavers, otters and elks along the river's banks.

Source^{1, 2, 3}



A whole variety of activities can be pursued along and on the river: walking, jogging, biking, winter cross-country skiing, taking a cruise on the river sightseeing boat, water tram, ferry, or on a motorboat. Kayaking, paddle boarding and wakeboarding are also available, not to mention traditional punting. The river offers an infrastructure that supports different activities which include:

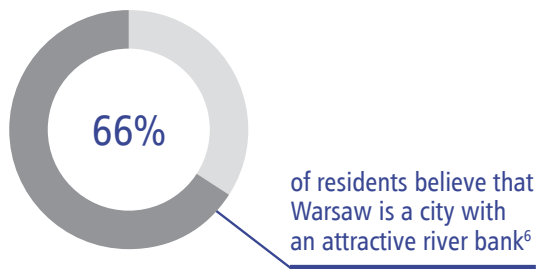


Source⁴

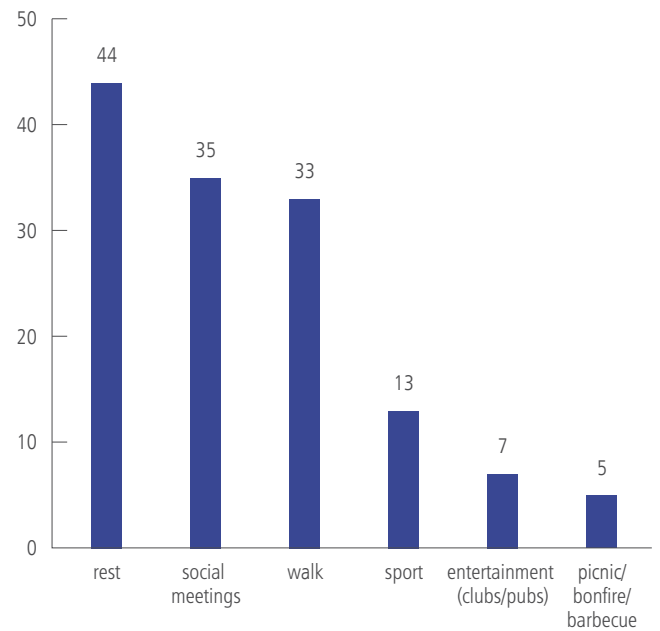
The common opinion among the river's visitors is that the Vistula is a unique combination of nature and culture in the city, a coming-together of civilization (left bank) and wildness (right bank) in the heart of the city. What is most appreciated is the river itself, peace and quiet, nature and greenery, beautiful landscape and beaches.



Source⁵



Main activities undertaken by the Vistula (%)*



*total percentage data is over 100% as respondents could indicate more than one activity

Source⁵



97%

of users see the Vistula as a place where one can enjoy time spent there

92%

of users see the Vistula as a safe place where they can spend time

82%

of users have a positive opinion of the changes that have taken place over the past ten years by the Vistula

10%

of users of the Vistula live outside Warsaw

Source⁵



TOURIST TRAFFIC CHARACTERISTICS

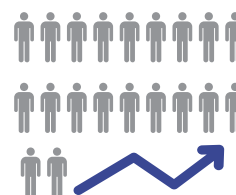
Estimated scale of tourist traffic in 2010-2015¹

| Type of stay | Number of people in thousands | | | | | |
|--|-------------------------------|--------------|--------------|--------------|--------------|--------------|
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
| Foreign same-day visitors | 115 | 120 | 130 | 133 | 140 | 150 |
| Foreign tourists | 2,150 | 2,250 | 2,390 | 2,420 | 2,550 | 2,650 |
| Total foreign same-day visitors and tourists | 2,265 | 2,370 | 2,520 | 2,563 | 2,690 | 2,800 |
| Domestic same-day visitors | 1,220 | 1,240 | 1,280 | 1,292 | 1,360 | 1,650 |
| Domestic tourists | 3,280 | 3,450 | 3,600 | 3,752 | 3,950 | 4,000 |
| Total domestic same-day visitors and tourists | 4,500 | 4,690 | 4,880 | 5,044 | 5,310 | 5,650 |
| Total same-day visitors | 1,335 | 1,360 | 1,410 | 1,425 | 1,500 | 1,800 |
| Total tourists | 5,430 | 5,700 | 5,990 | 6,172 | 6,500 | 6,650 |
| Total same-day visitors and tourists | 6,765 | 7,060 | 7,400 | 7,597 | 8,000 | 8,450 |
| Changes in % | ↑ 2.3 | ↑ 4.4 | ↑ 4.8 | ↑ 2.7 | ↑ 5.3 | ↑ 5.6 |

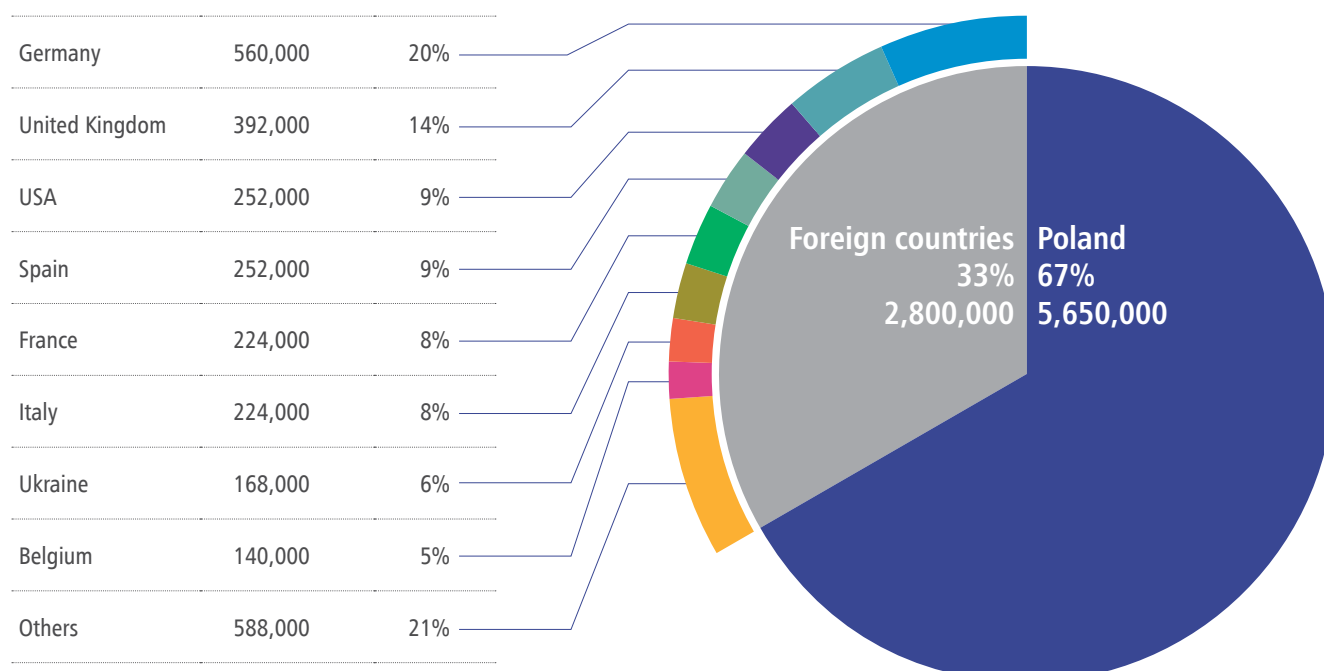
MasterCard 2015 Global Destination Cities Index²

[8th place]

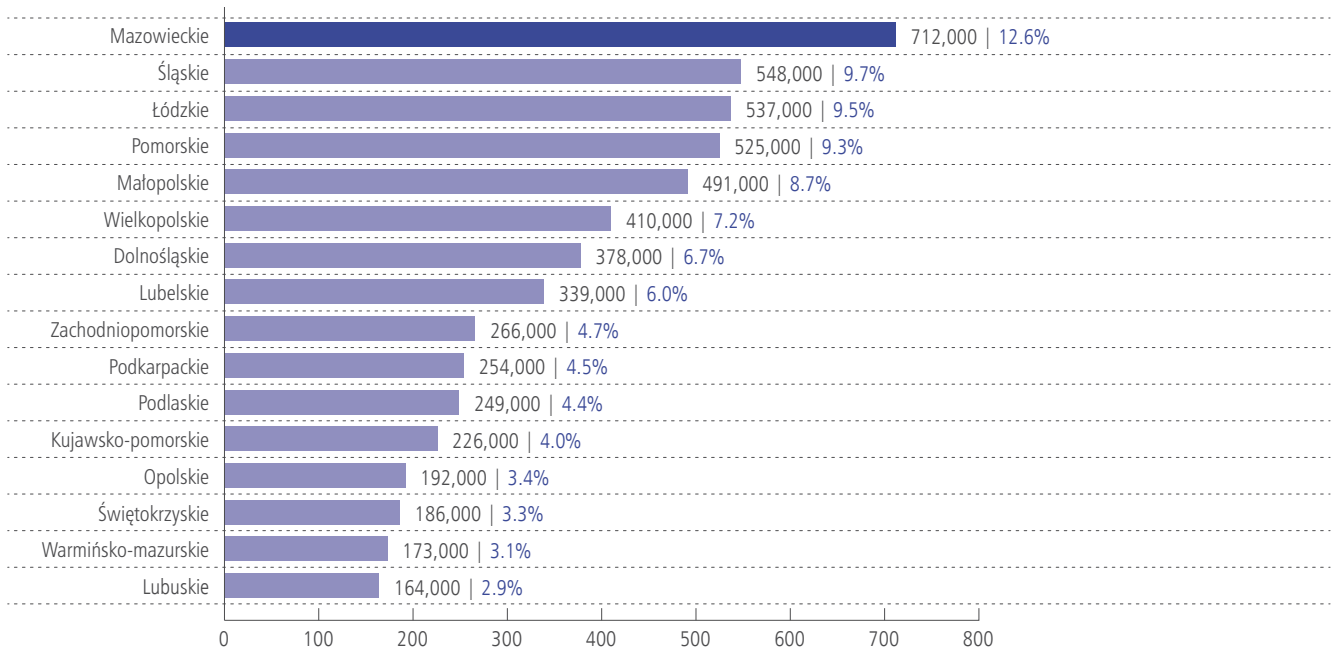
in the ranking of Europe's fastest growing destination cities
by international overnight visitors



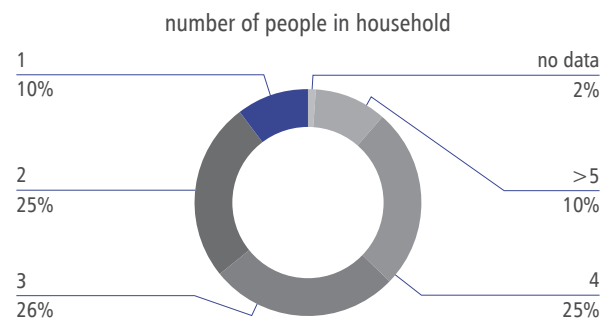
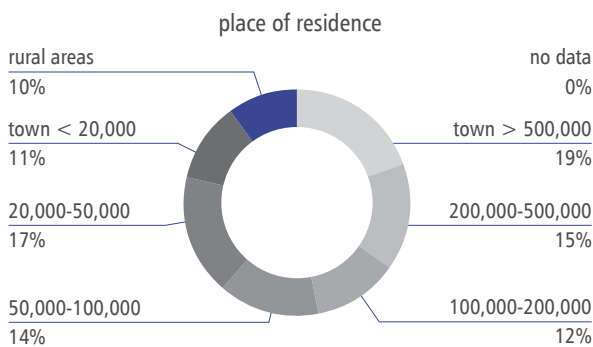
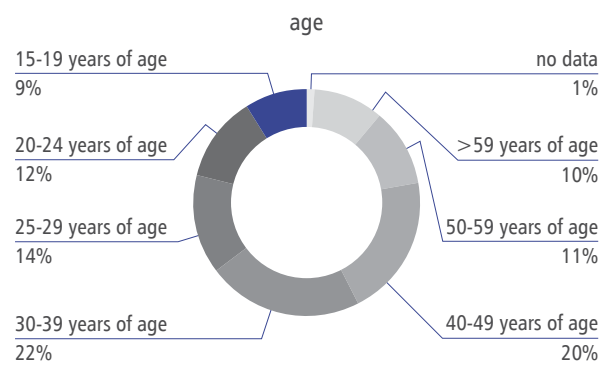
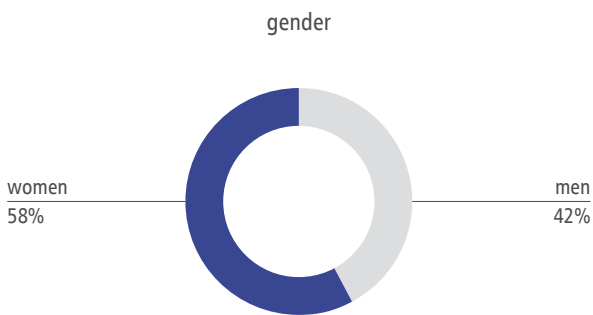
Estimated number and percentage share of tourists and same-day visitors by country¹



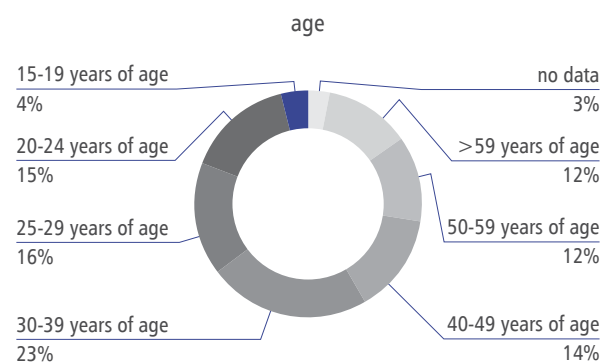
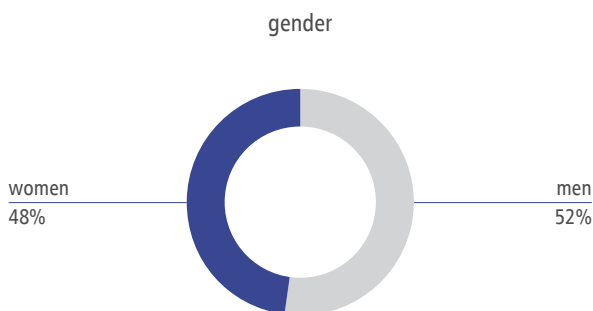
Tourists and same-day visitors by voivodship (region) – estimated number and percentage share¹

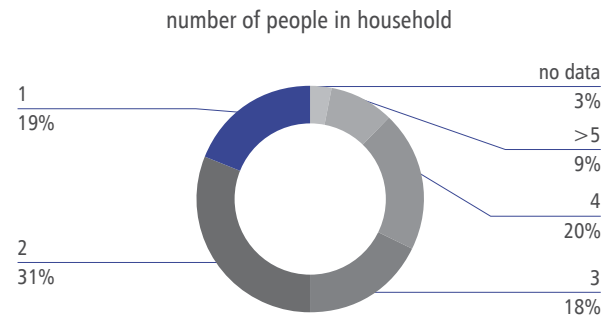
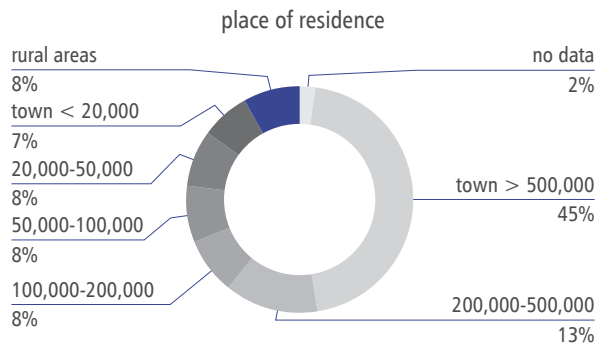


PROFILE OF A DOMESTIC TOURIST³

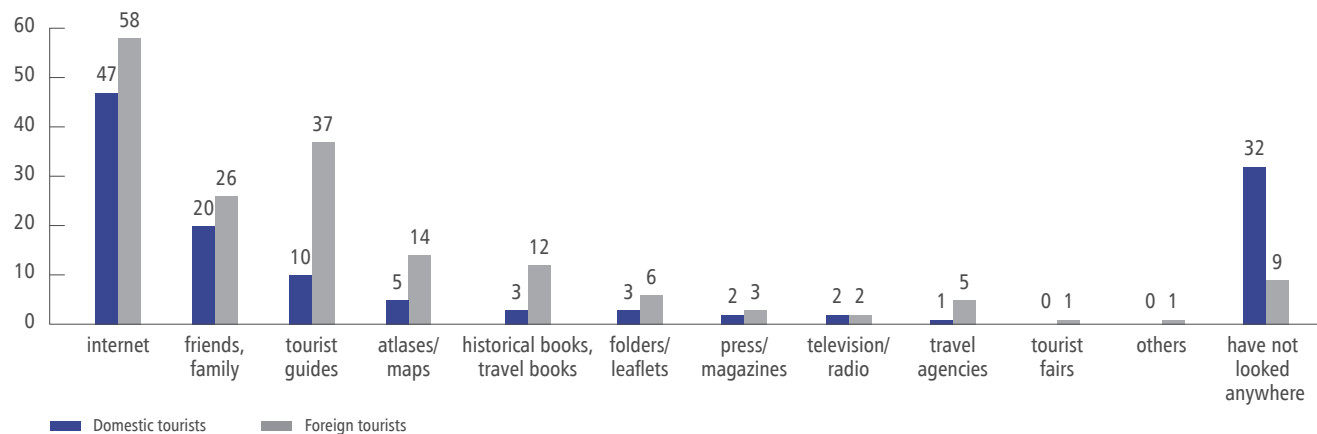


PROFILE OF A FOREIGN TOURIST³





Sources of information about Warsaw (%)*



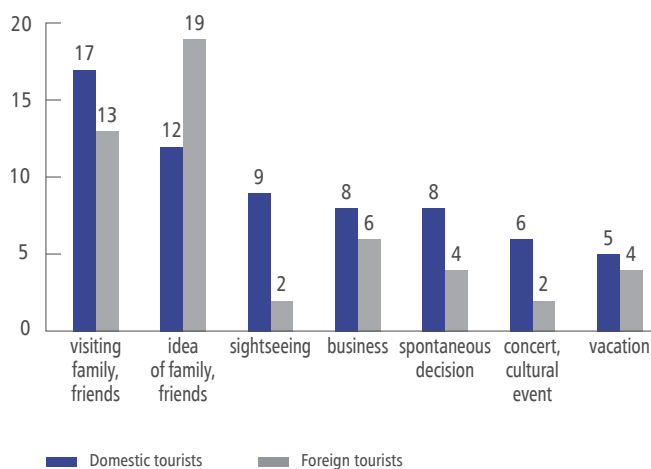
*total percentage data is over 100% as respondents could indicate more than one source

Source³

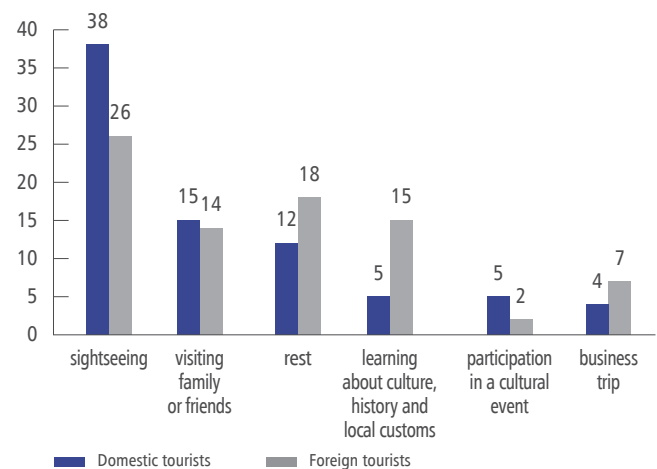


71% of tourists organise their trip to Warsaw by themselves, for **16%** of tourists, the trip is organised by family or friends³

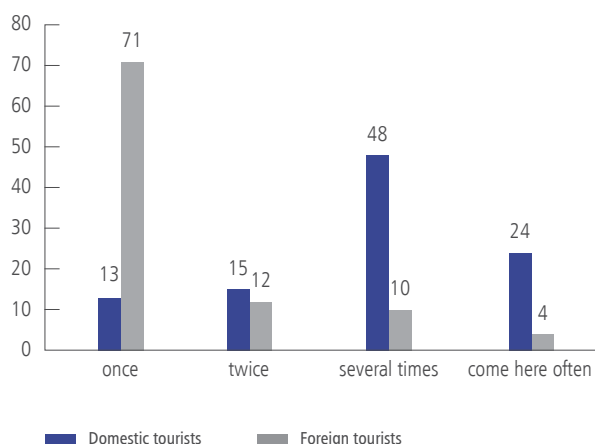
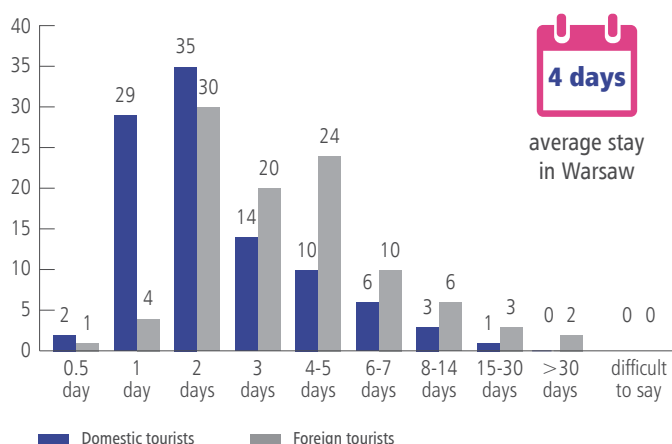
Impulse to come to Warsaw (%)³



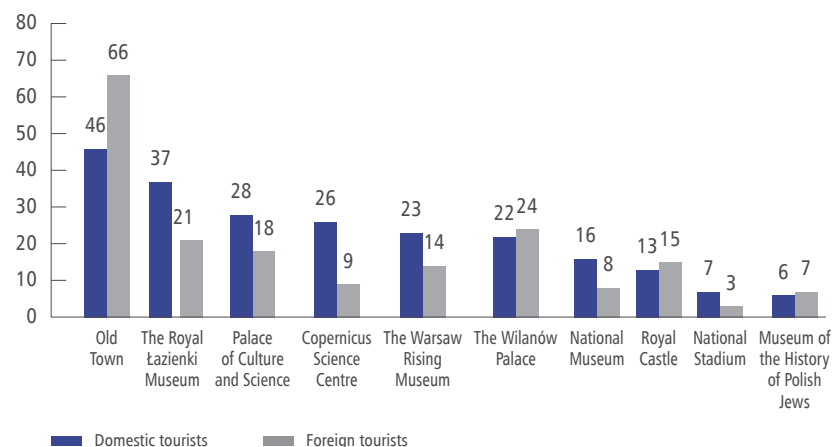
Main purpose of visiting Warsaw (%)³



82% of tourists come to Warsaw directly from their place of residence³

Frequency of visits to Warsaw (%)³Length of stay in Warsaw (%)³

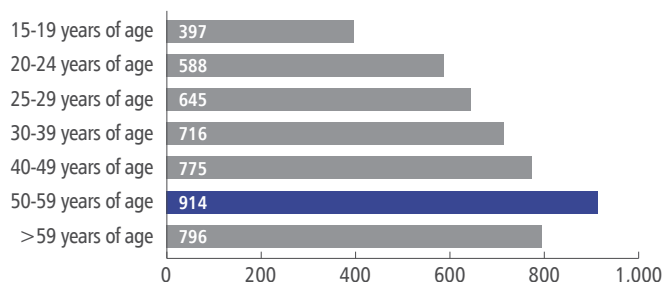
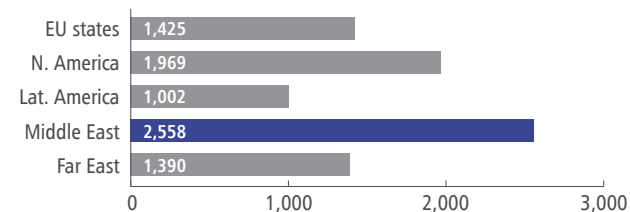
Main places visited in Warsaw (%)*

**PLN 717**

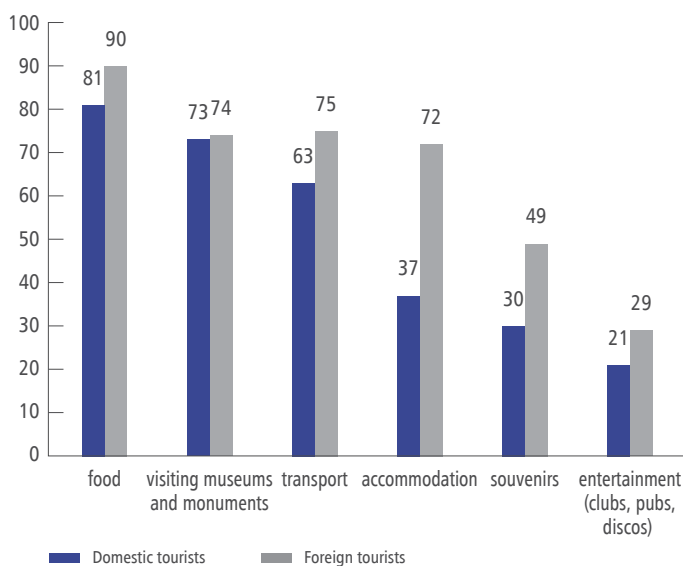
average declared amount
spent per person
during stay in Warsaw
(PLN 407 domestic tourists,
PLN 1,542 foreign tourists)³

*total percentage data is over 100% as respondents could indicate more than one place

Source³

Average declared amount spent per person during stay in Warsaw by age (PLN)³Average declared amount spent per person during stay in Warsaw by region of the world (PLN)³

Main spending purposes during stay in Warsaw (%)*



*total percentage data is over 100% as respondents could indicate more than one spending purpose

Source³



MEETINGS INDUSTRY



Warsaw is the **largest and most important destination** for a host of scientific and business events in Poland. It is a hub for political, economic, scientific, business, and cultural interests in the entire region of Central and Eastern Europe. Many institutions and organisations from the region have their seats here, naturally guaranteeing an inflow of ideas, innovation and capital.



Warsaw is the **unquestioned leader** in terms of the number of business and scientific events in Poland (congresses, conferences, fairs, incentive meetings, etc.) – with **approx. 25,000** organised here every year.



From among over **200 key MICE venues** in Warsaw, there are also: 19 congress venues, 31 hotels with conference capabilities, and 41 other types of venues (museums, theatres, universities with conference rooms).



From the perspective of the meetings industry, Warsaw is the **best connected Polish city in terms of international air connections**, and has the best hotel conference infrastructure – over 23,000 bed places in different categories of hotels, including over 12,000 bed places in 4 and 5-star hotels.

Source¹

WORLD ICCA RANKING (INTERNATIONAL CONGRESS AND CONVENTION ASSOCIATION)^{2, 3}

40th place

- ▶ with 62 association meetings fulfilling the following criteria: recurrence, minimum 50 participants and migration between at least three countries
- ▶ the highest place among Polish cities
- ▶ Warsaw is ahead of cities such as Zurich, New York and Dubai

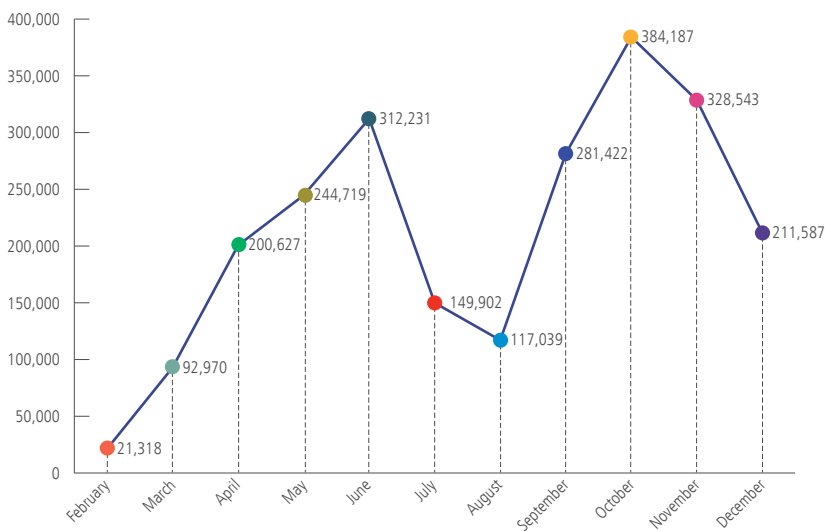
WARSAW CONFERENCE MARKET – SIZE AND CHARACTERISTICS

The diagrams presented below are based on data from the Demand Outlook system maintained by Z-Factor, which collected detailed information about over 12,000 events that took place in 2015 in Warsaw.

Demand Outlook does not include all conference venues in Warsaw – it focuses primarily on hotel establishments of key significance to the conference and events market in Warsaw. These are mainly 5, 4, and 3-star hotels of the most important hotel chains. Their share in the total number of events in the study was over 86%, while in terms of space rented – almost 90%.

Source^{1, 4}

Space used by month (m²)*

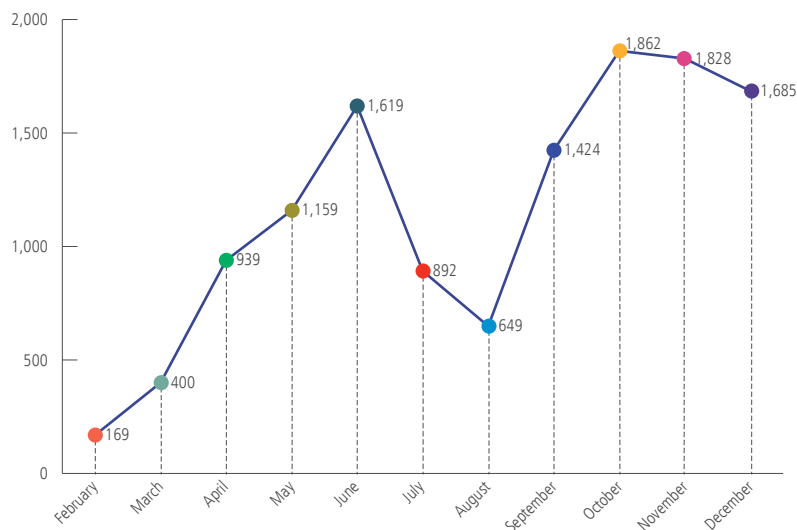


*summary data does not repeat meetings or events which have taken place at the turn of two months

*the Demand Outlook system was launched on 15 Feb 2015

Source^{1,4}

Number of meetings and events by month*

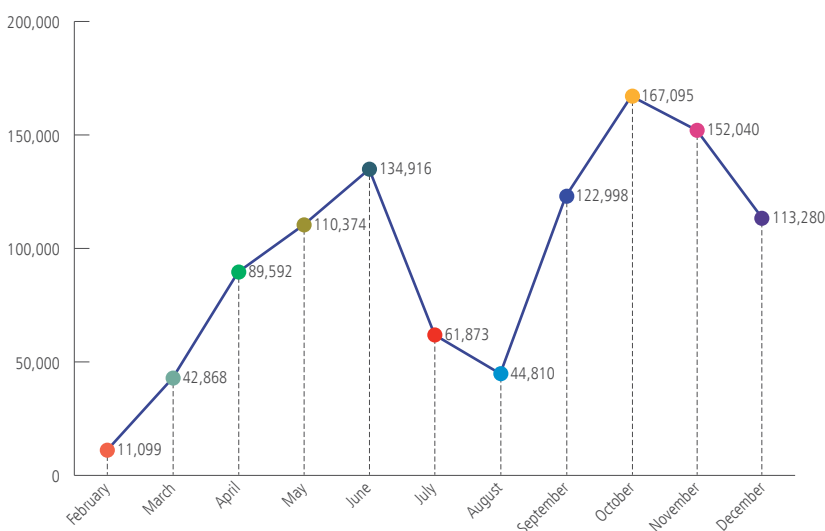


*summary data does not repeat meetings or events which have taken place at the turn of two months

*the Demand Outlook system was launched on 15 Feb 2015

Source^{1,4}

Number of participants of meetings and events by month*

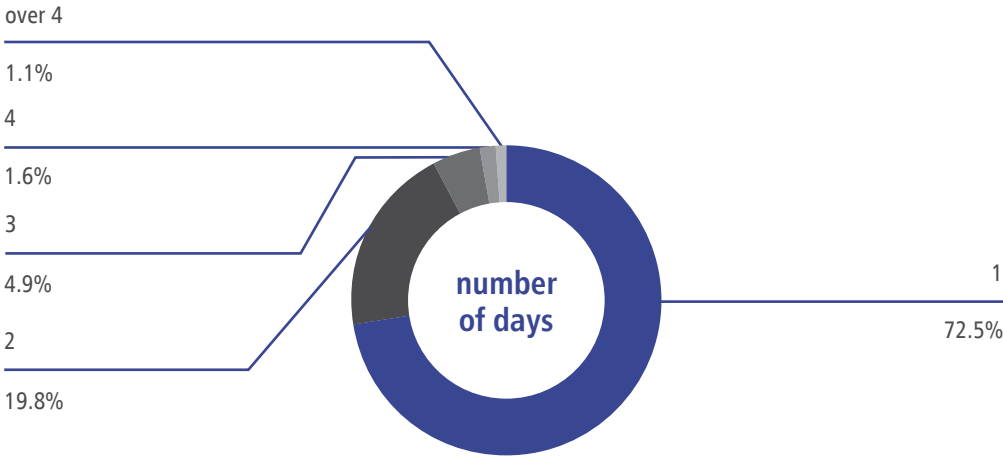


*summary data does not repeat meetings or events which have taken place at the turn of two months

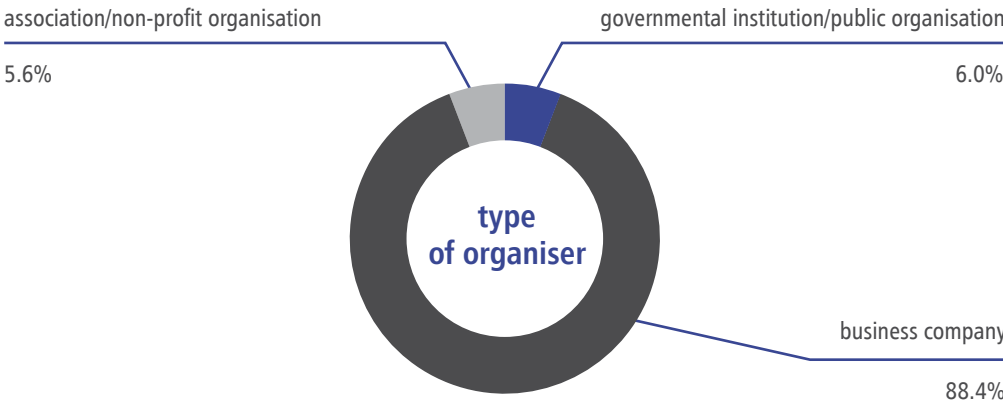
*the Demand Outlook system was launched on 15 Feb 2015

Source^{1,4}

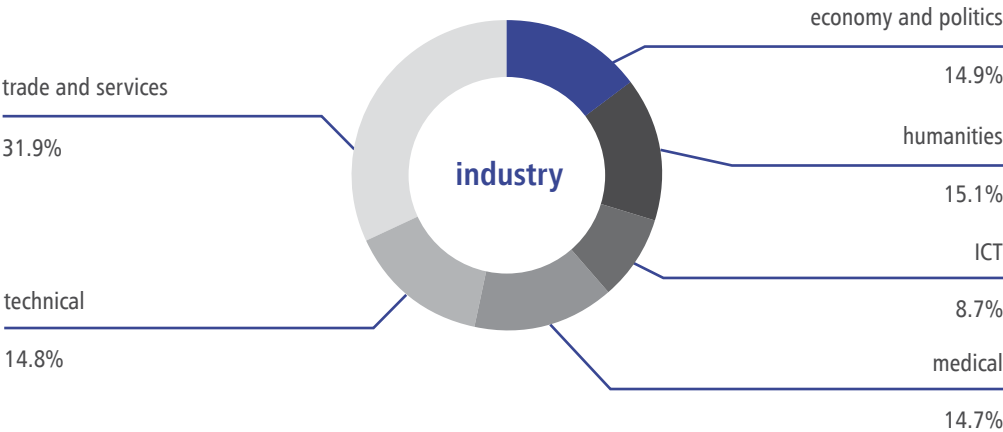
Meetings and events by duration⁴



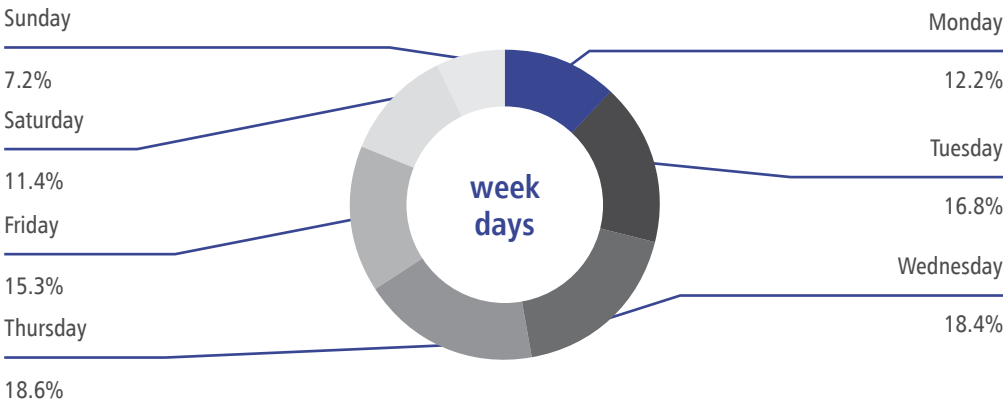
Meetings and events by type of organiser⁴

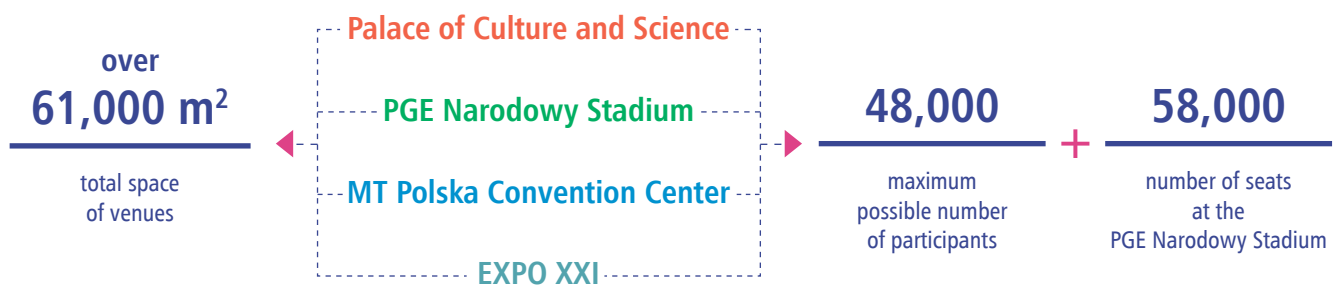
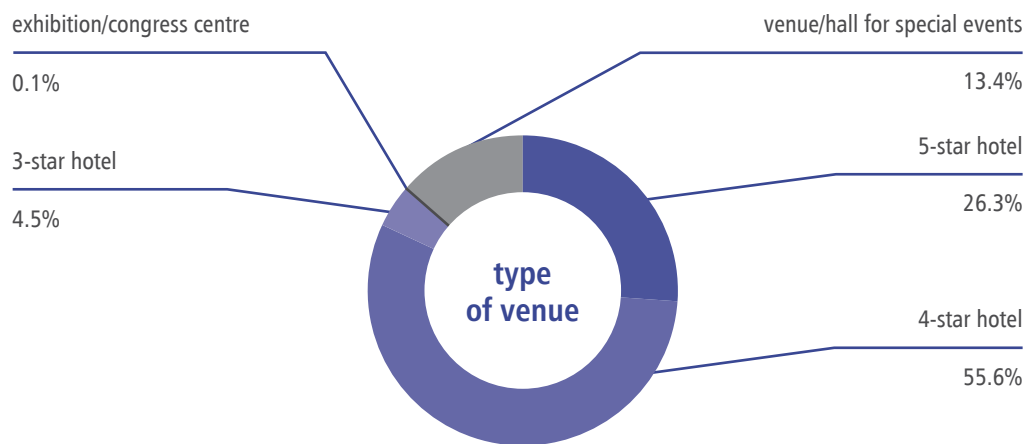


Meetings and events by industry⁴



Space used by day of the week⁴





SIZE OF THE CONFERENCE MARKET IN POLISH CITIES WITH CONVENTION BUREAUX⁶

| City | Meetings and events | | | | | Share % |
|---------------|------------------------|------------|------------------|------------------|---------------|--------------|
| | Conferences/congresses | Fairs | Corporate events | Incentive events | Total | |
| Bydgoszcz | 588 | 44 | 50 | 379 | 1,061 | 3.1% |
| Gdańsk | 1,736 | 83 | 476 | 947 | 3,242 | 9.5% |
| Katowice | 827 | 54 | 1,045 | 69 | 1,995 | 5.9% |
| Kielce | 609 | 49 | 23 | 8 | 689 | 2.0% |
| Kraków | 3,529 | 143 | 139 | 1,377 | 5,188 | 15.3% |
| Lublin | 225 | 2 | 112 | 152 | 491 | 1.4% |
| Łódź | 436 | 26 | 491 | 22 | 975 | 2.9% |
| Poznań | 1,648 | 139 | 692 | 500 | 2,979 | 8.8% |
| Toruń | 20 | 2 | 4 | 62 | 88 | 0.3% |
| Warsaw | 3,258 | 122 | 5,088 | 4,854 | 13,322 | 39.2% |
| Wrocław | 1,293 | 100 | 0 | 1336 | 2,729 | 8.0% |
| Others | 873 | 38 | 47 | 263 | 1,221 | 3.6% |
| Total | 15,042 | 802 | 8,167 | 9,969 | 33,980 | 100% |

*table illustrates the number of meetings and events based on data submitted by regional convention bureaux, as well as those directly uploaded by online form at the Poland Convention Bureau website



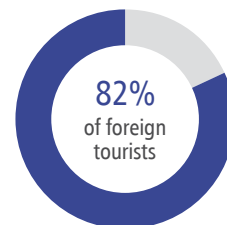
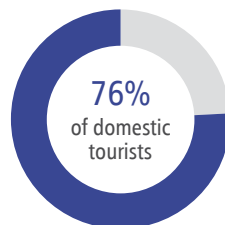
WARSAW'S IMAGE

7.85

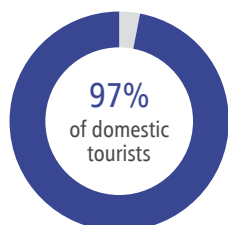
average tourist attractiveness
of Warsaw in the opinion of tourists*

*on a scale of 1 to 10

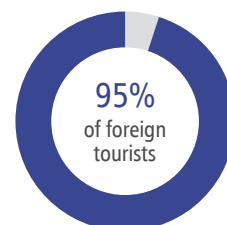
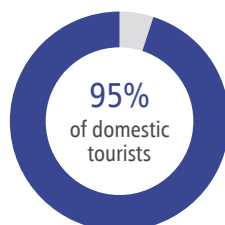
Source¹



believe that Warsaw turns out
to be more attractive
when actually seen¹

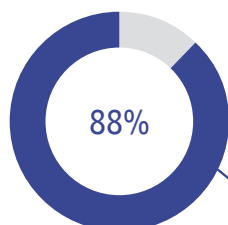
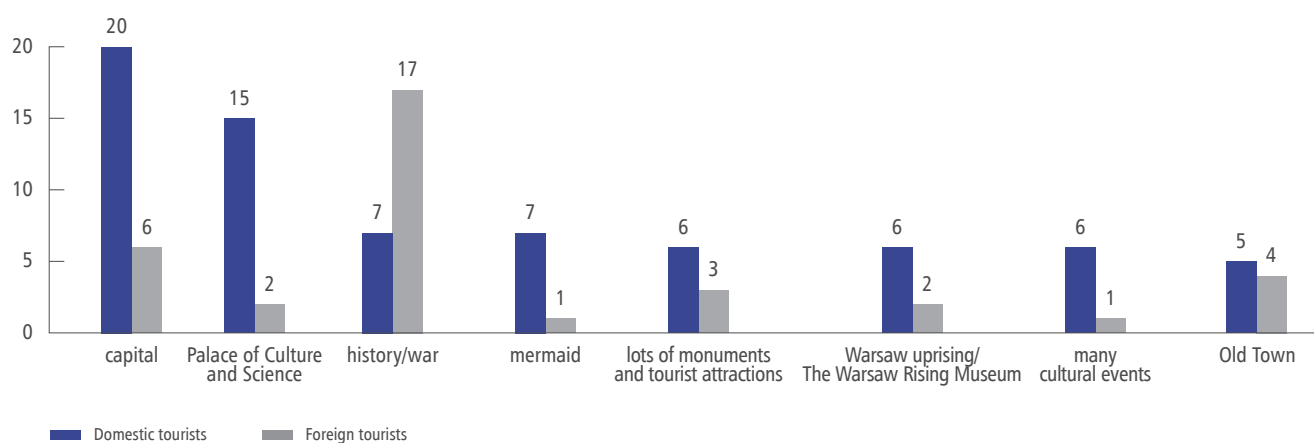


intend to visit Warsaw again¹

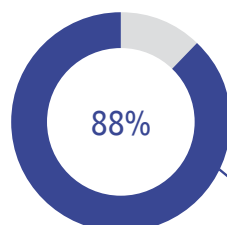


are ready to recommend a visit
to Warsaw to friends/family¹

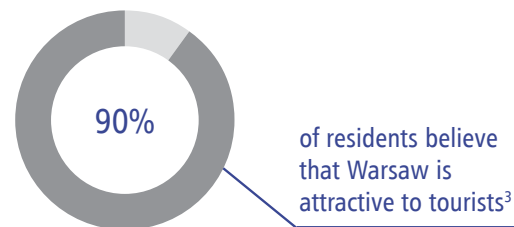
Selected associations of tourists with Warsaw (%)¹



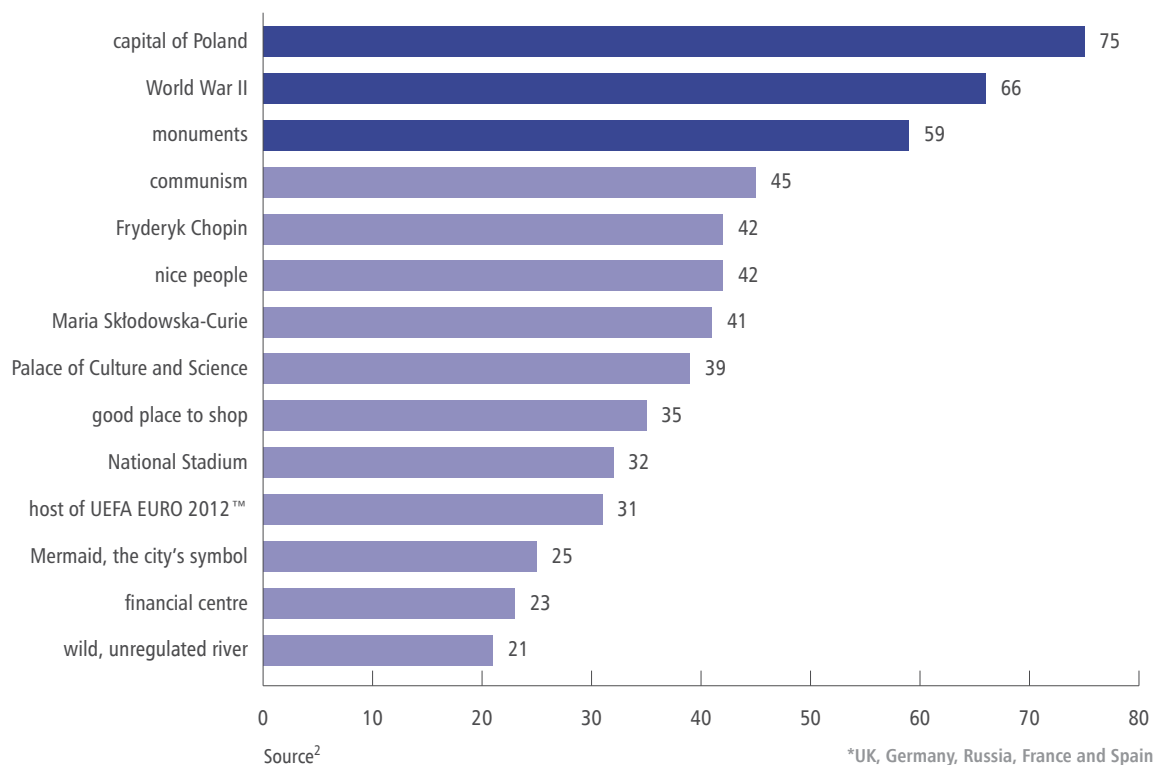
of tourists have
a positive opinion
of safety in Warsaw¹



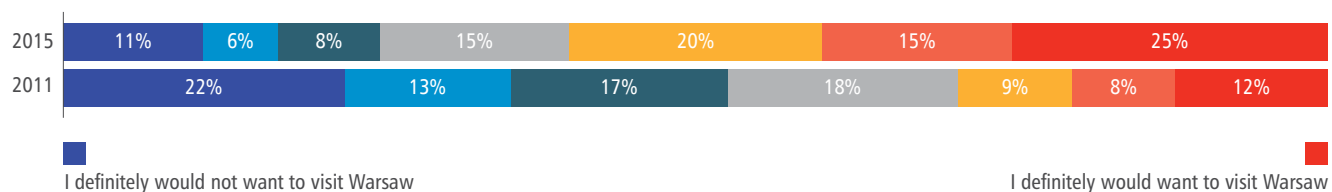
of tourists have a positive
opinion of the friendliness
and hospitality of Varsovians¹



Selected associations that residents of European countries have with Warsaw (%)^{*}



Inclination among residents of European countries to visit Warsaw (years 2011 and 2015)^{*}



Sources

Chapter I:

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3. BIULETYN STATYSTYCZNY MIASTA KRAKOWA. Rok XVII. IV KWARTAŁ, Urząd Statystyczny w Krakowie, 2015
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