











TOURISM IN WARSAW

REPORT 2016

Introduction		2
Key data		3
1. Warsaw – selected social and economic information		4
2. Accessibility		8
3. Tourist accommodation		12
4. Tourist attractions		16
5. Appealing urban places		20
6. Tourist traffic characteristics		24
7. Meetings industry		28
8. Warsaw's image		32
Sources		36





The successful administration of a city is above all the creation of different ways in which to make use of the city's public spaces by different groups of people: not only its inhabitants, but also tourists and the world of business. Warsaw, a **city of intense expansion and creativity**, is year on year increasing its capacity to deal with a host of diverse needs.

One of these needs is the ability to offer tourists a rich palette of cultural events. Warsaw offers tourists a wide range of activities: from intimate classical recitals, theatre performances and outdoor laser shows to rock and pop concerts for thousands of music lovers. Many events, like the Chopin Concerts in the Royal Łazienki Park or the Long Night of Museums, are free of charge giving everyone the opportunity to take part in culture at the highest level.

Tourists are also on the lookout for places in which to relax, of which Warsaw has plenty. The buzzing atmosphere on the banks of the River Vistula, Warsaw's parks, outdoor gyms, stadiums and sporting events mean that the city is an ideal place for both relaxation and physical exercise. Warsaw also has a host of **interesting urban places** which bring together entertainment, food and trading venues in one place. Places like Koszyki Market Hall, the Breakfast Market or Night Market attract not only Varsovians, but foreign guests alike, and have become a symbol of an open and vibrant city.

Warsaw is also seen as an attractive place to do business thanks to its well-developed infrastructure, its human capital and modern office spaces which pull in an ever-increasing number of international corporations and organisers of large-scale events. Poland's capital is also home to budding entrepreneurs and start-ups in the tech and creative sectors. What is certain is that in Warsaw you can count not only on a vibrant, creative atmosphere but genuine support.

Warsaw continues to grow, and create new meeting places, business spaces and entertainment venues thanks to which it continues to **become ever more appealing for tourists** whatever their needs and reasons for coming. The statistics in this report speak for themselves.

Estimated number of arrivals of tourists and same-day visitors

9,646,000

Arrivals of tourists, total

11,147,000

Arrivals of same-day visitors, total



2,733,000
Arrivals
of foreign tourists



6,913,000
Arrivals
of domestic tourists



154,000
Arrivals of foreign
same-day visitors

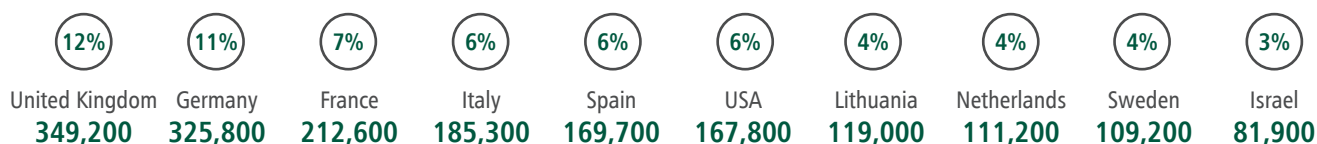


10,992,000
Arrivals of domestic
same-day visitors

Arrivals of tourists and same-day visitors, total

20,793,000

Arrivals of foreign tourists and same-day visitors by country of origin (top 10)



Most popular means of transport used by tourists coming directly to Warsaw

domestic | foreign



train

37% | 13%



car

31% | 7%



bus/coach

26% | 10%



airplane

6% | 69%

Tourist accommodation

over
410
tourist accommodation
establishments including
83 hotels

over
36,000
bed
places



nearly
3.2 million
tourists have used tourist
accommodation
establishments

nearly
5.5 million
nights spent by tourists
in tourist accommodation
establishments

Most popular main purposes of visiting Warsaw

domestic | foreign



sightseeing

40% | 29%



rest

17% | 24%



visiting relatives
or friends

11% | 9%



learning about the culture,
history and local customs

9% | 17%



business matters/
interests

5% | 7%



participation in
a cultural event

5% | 2%

The biggest tourist attractions in Warsaw according to tourists (top 5)



8.18

average tourist attractiveness
of Warsaw according to tourists
(on a scale of 1 to 10)



4.5 days

average length of stay in Warsaw



PLN 739

average declared amount spent per person
during stay in Warsaw



PLN 402

domestic tourists



PLN 1,482

foreign tourists



PLN 15.4 billion

contribution of tourism
to Warsaw GDP

8.44

average tendency of tourists to recommend
a visit to Warsaw to their family/friends
(on a scale of 1 to 10)



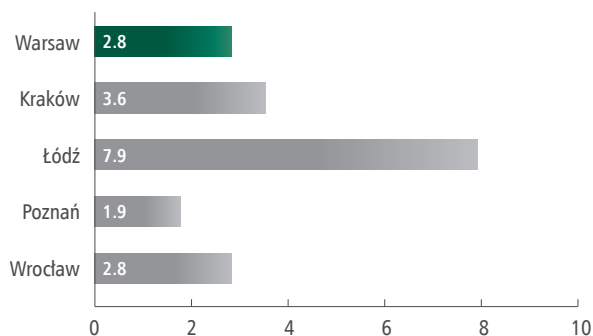
1. WARSAW – SELECTED SOCIAL AND ECONOMIC INFORMATION

BASIC DATA

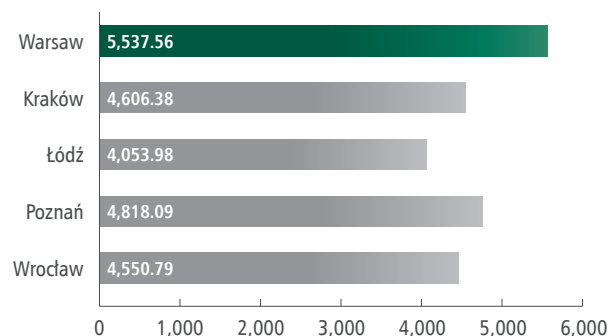


WARSAW COMPARED TO OTHER SELECTED CITIES^{2, 3, 4, 5, 6}

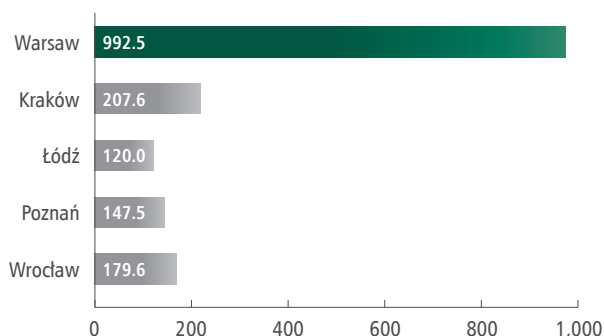
Registered unemployment rate at the end of December 2016 (%)



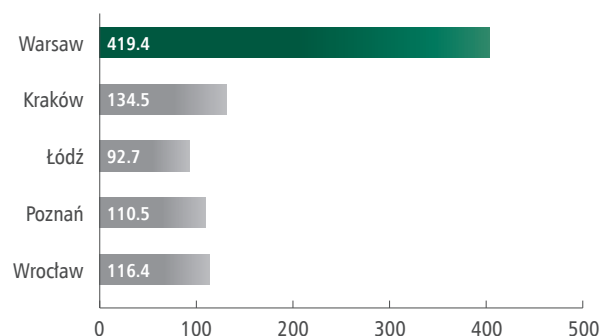
Average monthly gross wages and salaries in enterprise sector in January-December 2016 (PLN)



Average paid employment in enterprise sector in January-December 2016 (thousands)



Number of entities of the national economy in the REGON register at the end of December 2016 (thousands)



ESTIMATED IMPACT OF TOURISM ON THE WARSAW ECONOMY



Source⁷

E-REGI 2016. European Regional Economic Growth Index⁸

Ranking of European cities with the best economic prospects

20th place

[1st place]

among cities in Central and Eastern Europe

EMEA Investor Intentions Survey 2016¹¹

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

6th place

in the list of cities that are seen by investors as most attractive for making property investment purchases in 2016

fDi European Cities and Regions of the Future 2016/17. Rankings⁹

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

The Global Financial Centres Index 20¹²

Ranking of global financial centres

45th place

[1st place]

among cities in Eastern Europe and Central Asia

Tholons 2016 Top 100 Outsourcing Destinations¹³

Ranking of global outsourcing locations

25th place

Warsaw in top 3 in the 'biggest movers' category

Main Streets Across the World 2016/2017¹⁴

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

40th place

Nowy Świat

5 most expensive retail locations in Warsaw:

Nowy Świat

Chmielna

Marszałkowska

Trzech Krzyży

Jerozolimskie

fDi Polish Cities of the Future 2015/16¹⁰

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

Sustainable Cities Index 2016¹⁵

Global ranking of cities based on three pillars of sustainability: People, Planet and Profit

37th place

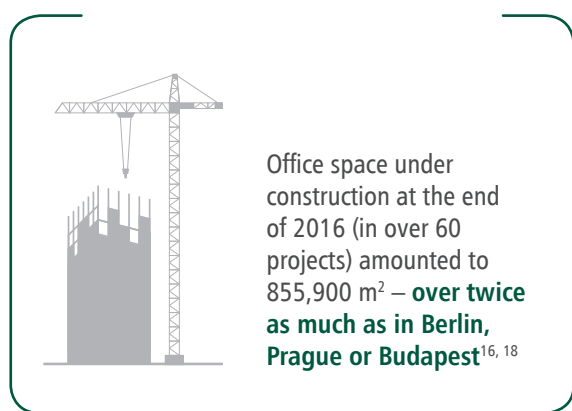
[15th place]

in the 'people' category

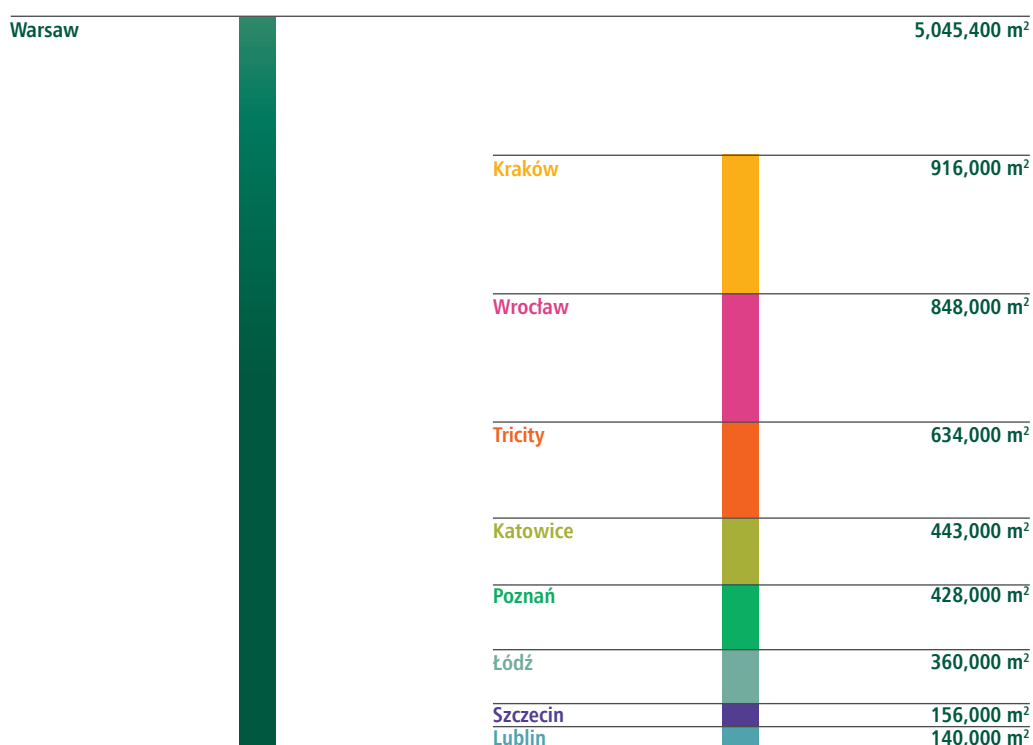
OFFICE SPACE IN WARSAW

5.05 million m ²	417,700 m ²	757,700 m ²	23.5 - 24 euro/m ² /month	13 - 16.5 euro/m ² /month
modern office space at the end of 2016	office space handed over for use in 2016	total area rented	nominal rent for the best office space in the Central Business District (COB)	nominal rent for the best office space outside the city centre

Source^{16, 17}



Modern office space in Warsaw compared to other selected cities at the end of 2016^{16, 21}



approx. 30%

of all start-ups in Poland are established in Warsaw²²

every 4th

Warsaw start-up is involved in analytics, advertising technology or FinTech²²

over 100

coworking spaces – the largest number in Poland^{22, 23}

Warsaw was one of the first cities in Poland to begin investing in start-ups with two business incubators established in the city:²²

Centre of Entrepreneurship Smolna^{22, 24}

- business incubator and coworking space, opened in 2013 in the Powiśle neighbourhood
- provides services for individuals planning on establishing their own business and for entrepreneurs
- organises, among others, free training sessions, workshops and networking meetings for both active and future entrepreneurs
- provides office space to let on preferential terms, including 40 workstations in an open space as well as 3 conference rooms

Centre of Creativity Targowa^{22, 25, 26}

- business incubator for entrepreneurs working in the creative sector, opened in 2016 in the Praga district
- supports start-ups by offering preferential rent, organising training sessions as well as providing consulting and informative services
- has at its disposal 33 creative studios, 6 conference rooms, an exhibition space, event space, a concept store and public reading room



**Warsaw
15th**

in Europe for start-up owners when asked about the possibility of where they would set up their business if given another chance²⁷



**Warsaw
14th**

largest start-up hub in Europe according to the blog EU-Startups.com²⁸

QUALITY OF LIFE IN WARSAW

In the academic year 2015/2016 in Warsaw:²⁹

- ▶ there were approx. **70 higher education institutions**
- ▶ approx. **260,000 students** of which approx. 16,000 were foreigners in Warsaw's higher education institutions

Over **29% of foreigners** studying in Poland are students of one of Warsaw's higher education institutions²⁹

The University of Warsaw has been Poland's **number one** university three times in a row according to the Perspektywy 2016 Higher Education Institutions League Table³⁰



Warsaw scored '**very high**' (the highest possible level) in terms of fluency in the EF English Proficiency Index – a ranking showing the level of English skills^{31, 32}

79%

of Warsaw residents, given the choice, would prefer to live in Warsaw

85%

of Warsaw residents have a positive opinion of safety in the city

84%

of Warsaw residents have a positive opinion of cleanliness and tidiness in the city

87%

of Warsaw residents have a positive opinion of greenery in the city

85%

of Warsaw residents have a positive opinion of the public transport in the city

70%

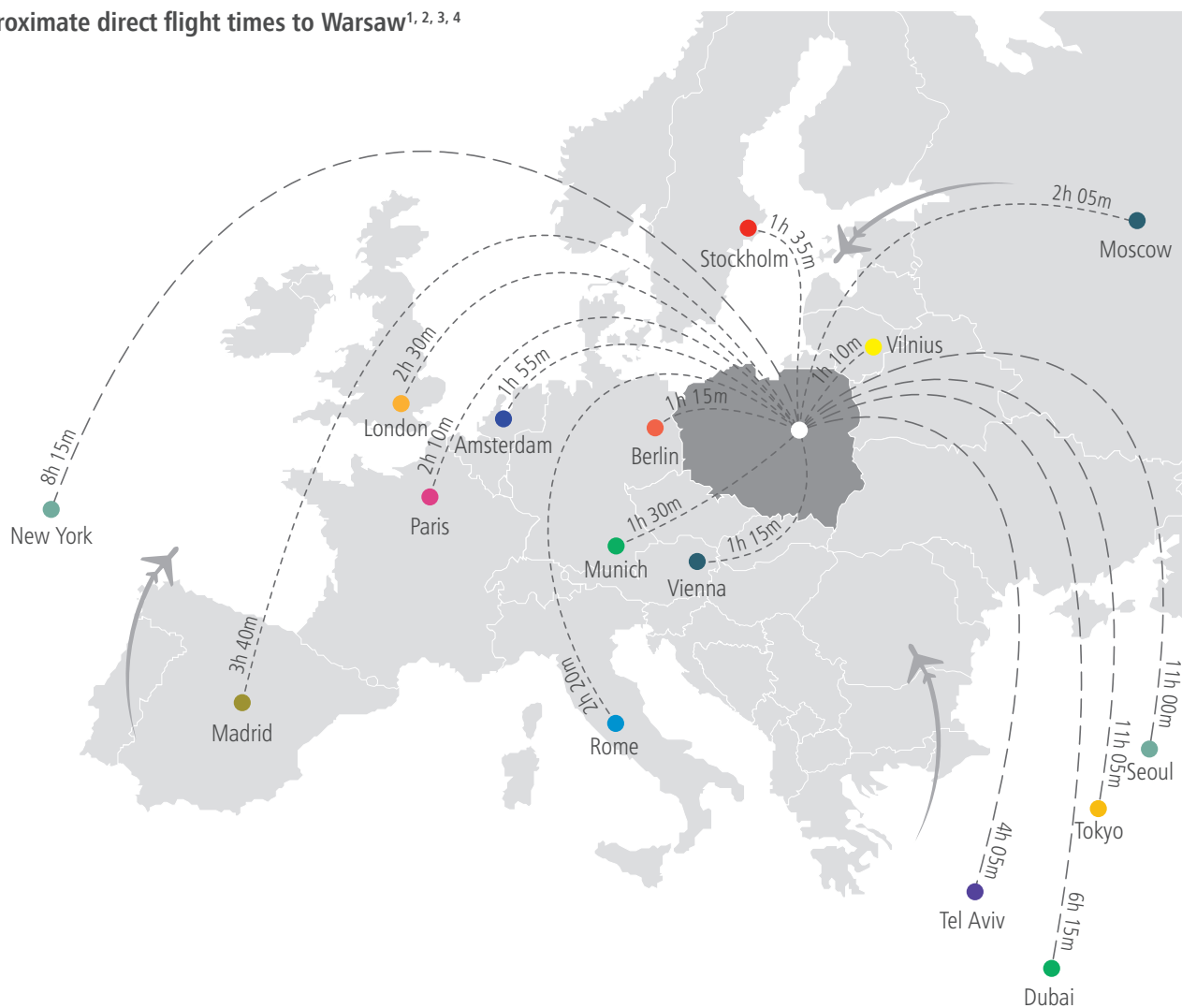
of Warsaw residents believe that Warsaw is a bicycle-friendly city



2. ACCESSIBILITY

AIR

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



Warsaw Chopin Airport

12.8 million



passengers
served

over
138,900



flight operations
performed

176



destinations

38%



of Polish air market
share

Source^{5, 6}

Distance from the centre of Warsaw⁷

approx. 10 km



Approximate travel time from airport to Warsaw centre⁸

car/taxi/
Rapid Urban Railway



bus



Best Airports in Europe 2016⁹

Ranking comparing European airports in terms of facilities for passengers

11th place

"Euro ANNIE" awarded by industry website anna.aero¹⁰

Comparison of European airports with the highest number of new connections

1st place

Preludium Executive Lounge recognised by clients of members of Priority Pass as **the best lounge in the world** in the category of Best Business Facilities.

Warsaw Chopin Airport was the first Polish airport to ever win a Priority Pass award.¹¹

Warsaw Chopin Airport was awarded the IDOL title among institutions and companies **friendly to the blind**.

Voters complemented the use of acoustic tactile maps which helped disabled passengers navigate around the airport.¹²



Polish Airlines LOT has opened up direct flights **from Warsaw to Tokyo and Seoul**. Air China has regular flights from **Beijing to Warsaw**, the first Asian carrier to offer direct routes to Poland^{13, 14, 15}

Warsaw Modlin Airport

2.9 million



passengers
served

nearly

18,300



flight operations
performed

42



destinations

8%



of Polish air market
share

Source^{6, 16}

Distance from the centre of Warsaw¹⁷

approx. 36 km



Approximate travel time from airport
to Warsaw centre^{8, 18}



car/taxi/bus



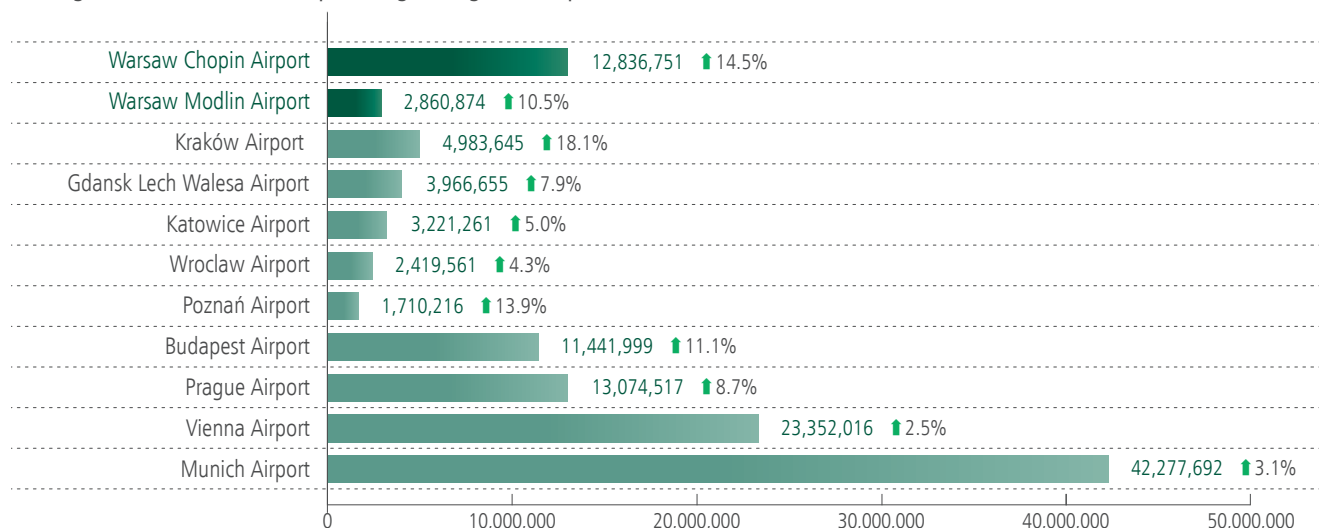
Ryanair opened up **8 new routes** in winter 2016/2017, including Porto, Toulouse, Valencia and Belfast¹⁹



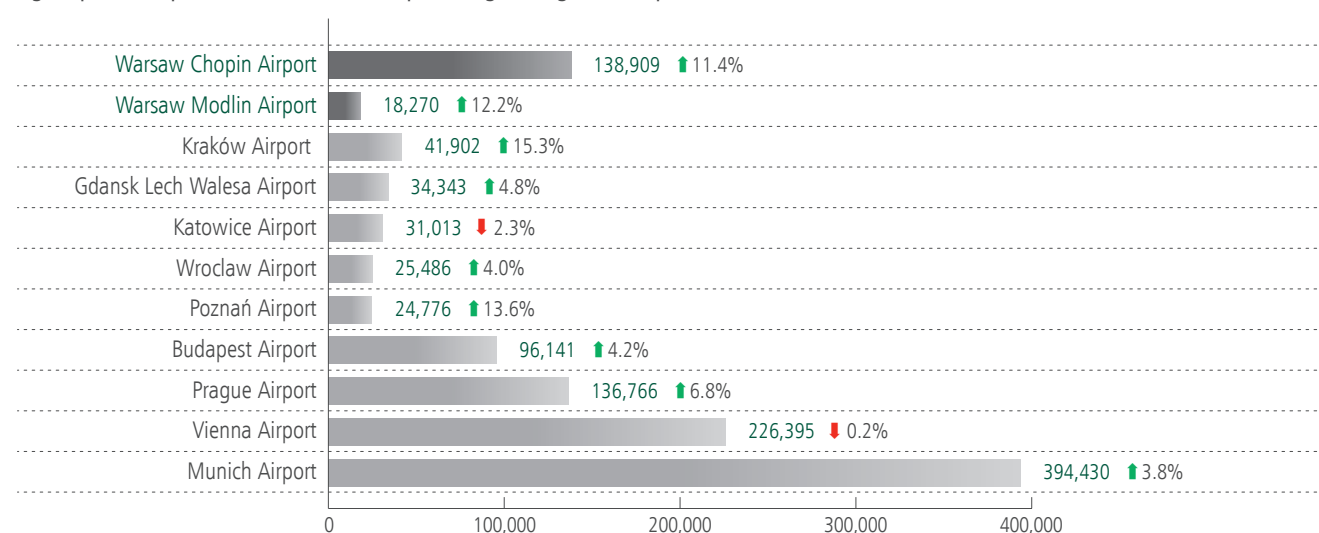
Warsaw Modlin Airport has opened up **new food areas** — a large restaurant located in the building in front of the terminal, a coffee shop and tapas bar^{20, 21}

Warsaw Chopin Airport and Warsaw Modlin Airport in comparison to other selected airports

Passengers served – number and percentage changes in comparison to 2015



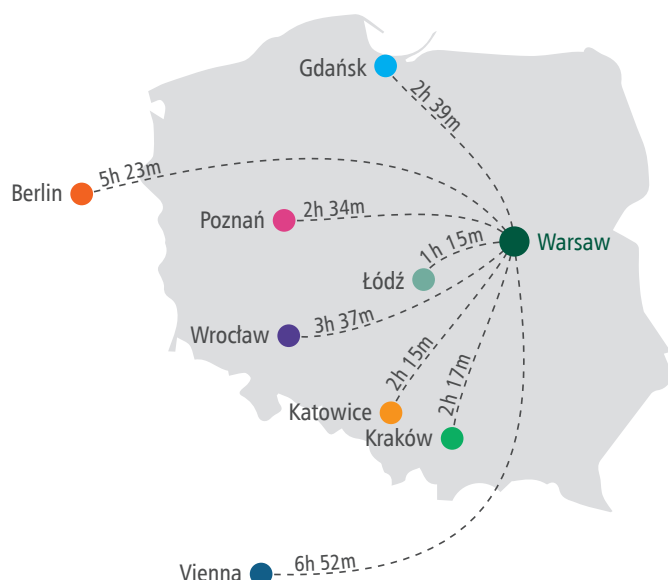
Flight operations performed – number and percentage changes in comparison to 2015



Source^{5, 16, 22, 23, 24, 25, 26, 27, 28, 29, 30}

RAIL

Direct travel time to Warsaw³¹



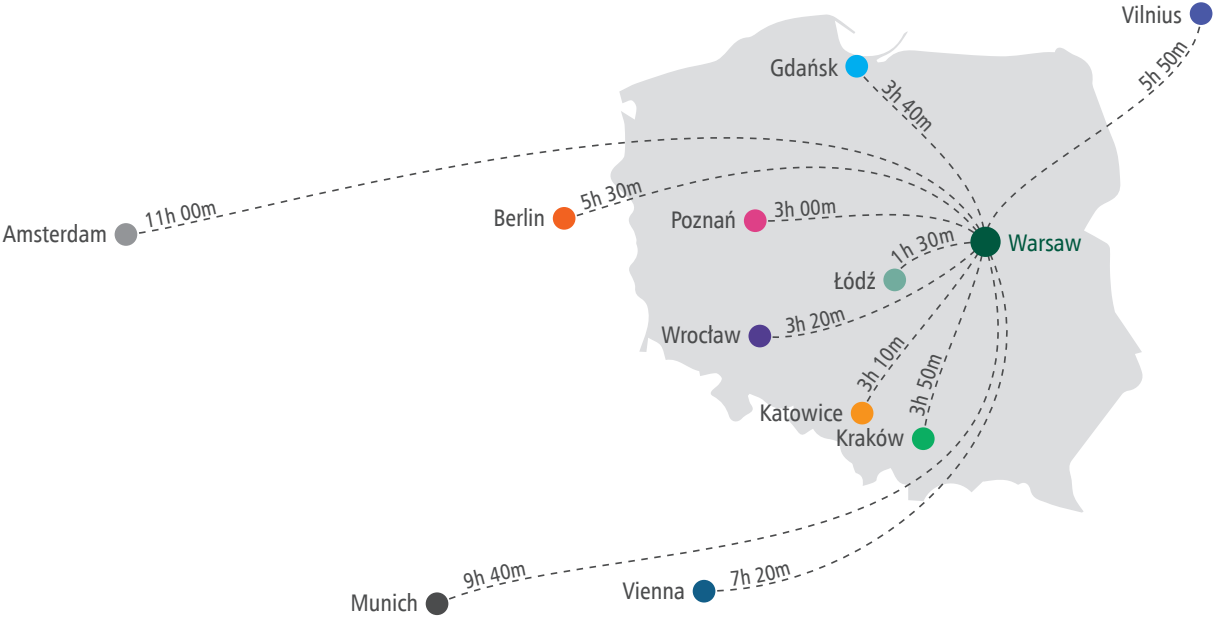
The Kraków-Warsaw route is used most frequently – 2.4 million passengers used this route in 2016 (record number in the history of PKP Intercity)³²



Warsaw Central Station facelift completed³³

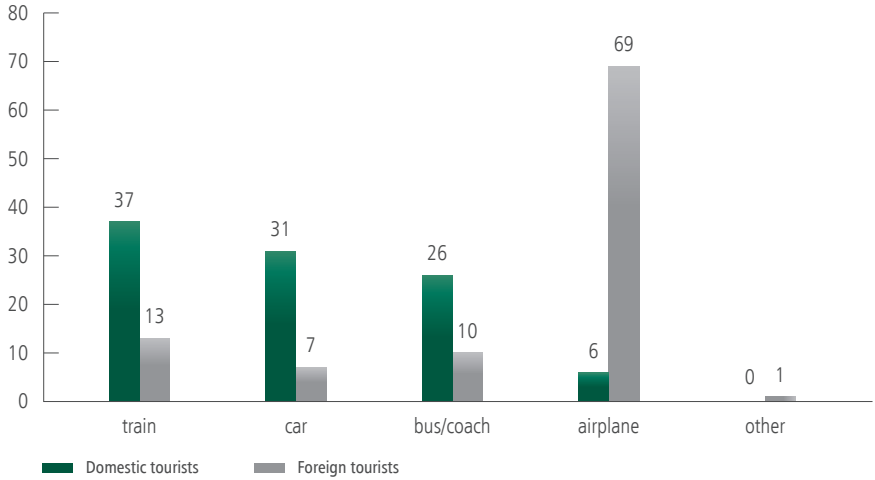
- additional space thanks to a modern-design mezzanine which includes power points and internet access
- 11 new retail premises and 3 block booths with varied retail and services points in the main hall of the station

Approximate travel time to Warsaw

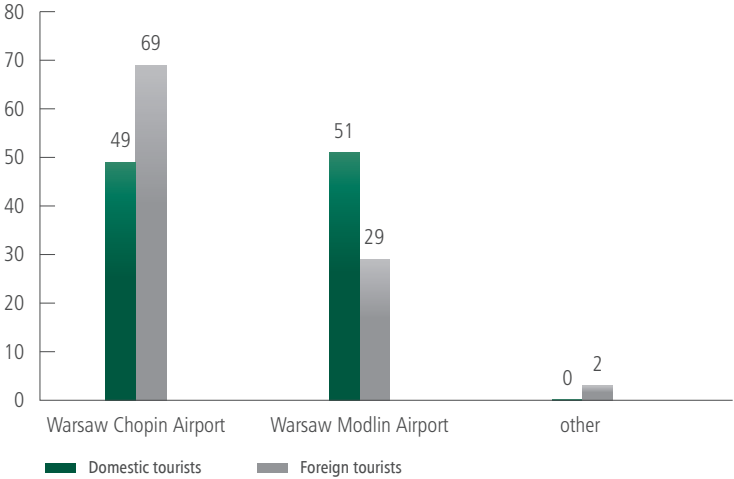


MEANS OF TRANSPORT USED BY TOURISTS COMING TO WARSAW³⁴

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



Airports of arrival to Warsaw (%)





3. TOURIST ACCOMMODATION

Accommodation establishments and bed places*

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



over
410
tourist accommodation
establishments



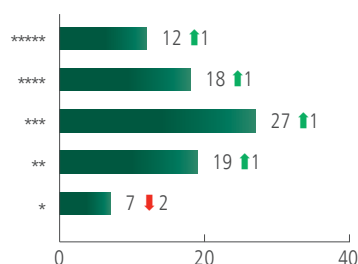
over
36,000
bed
places

Source¹

Hotels*

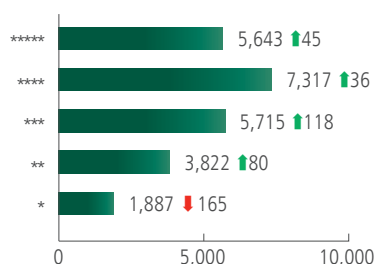
*based on data supplied by the City of Warsaw and the Ministry of Sport and Tourism

Establishments by category – number and change in comparison to 2015¹



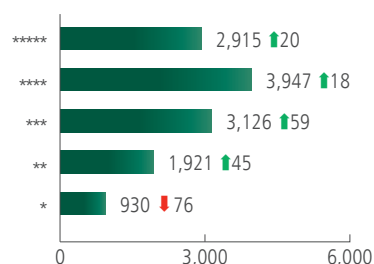
total
83
↑2

Bed places by hotel category – number and change in comparison to 2015¹



total
24,384
↑114

Rooms by hotel category – number and change in comparison to 2015¹

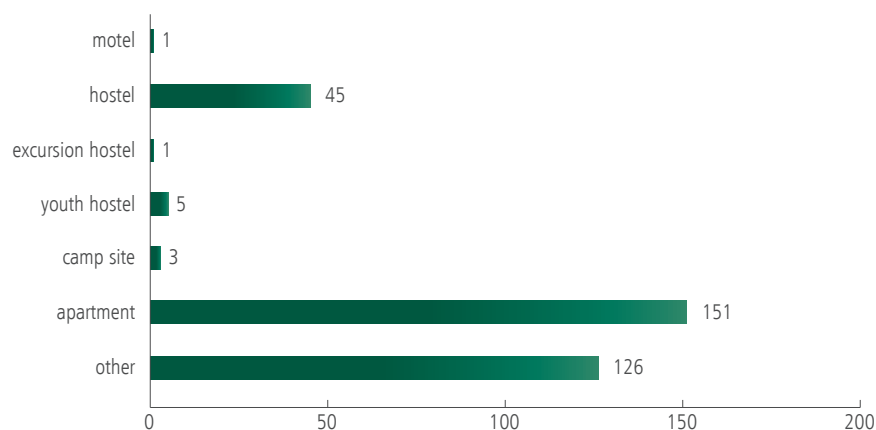


total
12,839
↑66

Other tourist accommodation establishments*

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

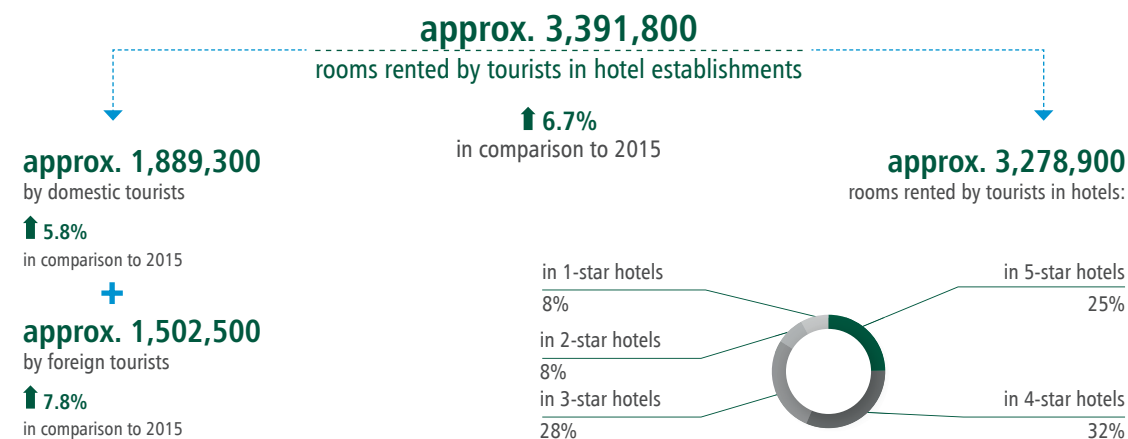
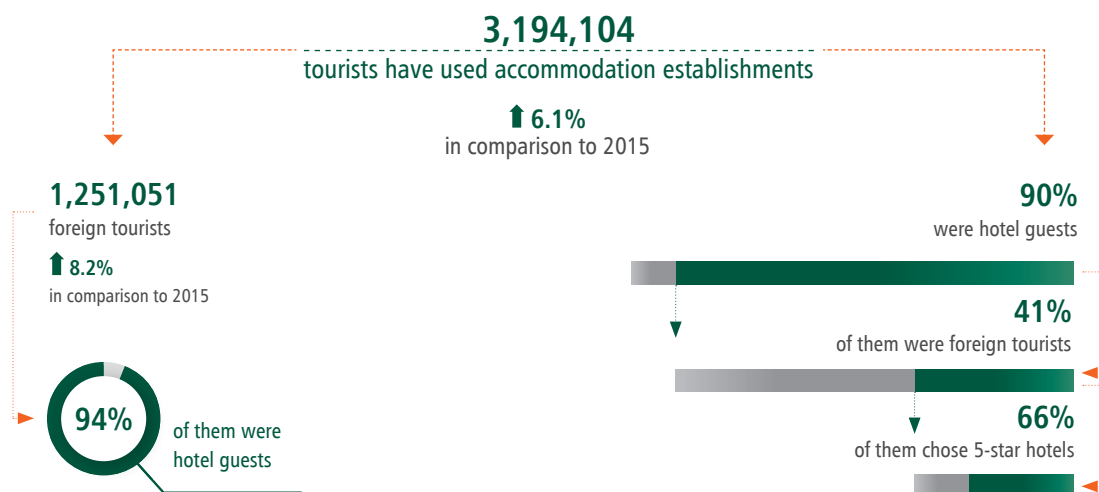
Number of establishments¹



total
332

Use of tourist accommodation establishments*

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

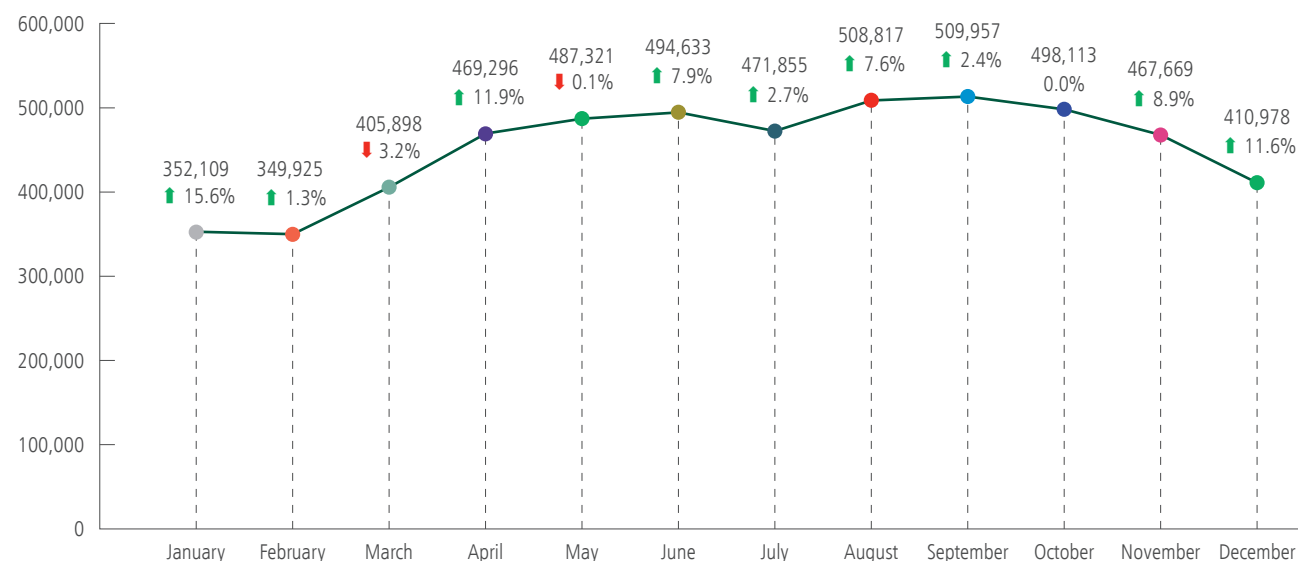


Occupancy

70%
in hotel establishment
(1 pp more than in 2015)

73%
in hotels, with peak times in:
September (82%), June (82%),
April (79%) and October (79%)

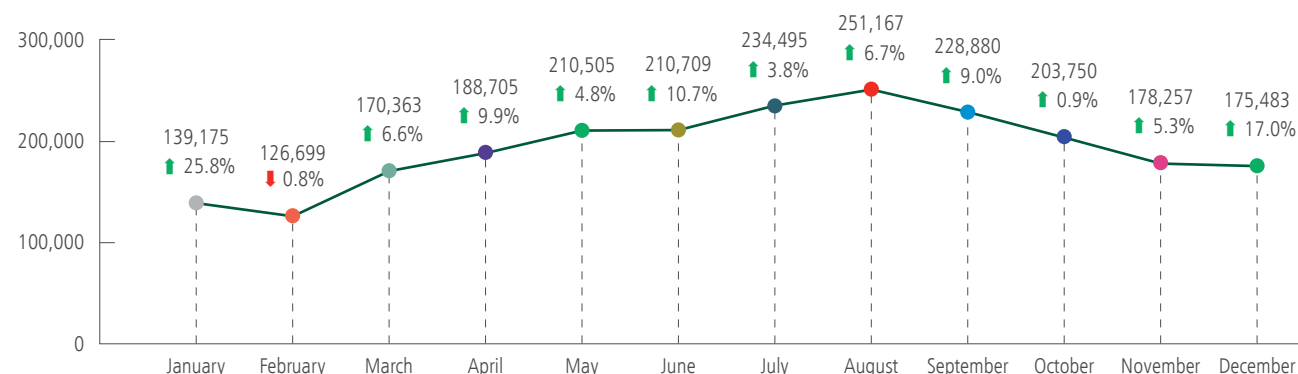
Nights spent by tourists by months – number and percentage change in comparison to the corresponding period in 2015*



*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 2015*



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

Source^{3, 4, 5, 6}

1.7
days

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

among Poland's counties and cities with county rights in terms of the number of nights spent by tourists (5.4 million), ahead of both Kraków (4.9 million) and the seaside county of Kołobrzeg (4.4 million)*

*data from establishments included in the report

42nd
place

among Poland's counties and cities with county rights in terms of the number of nights spent per 1,000 people*

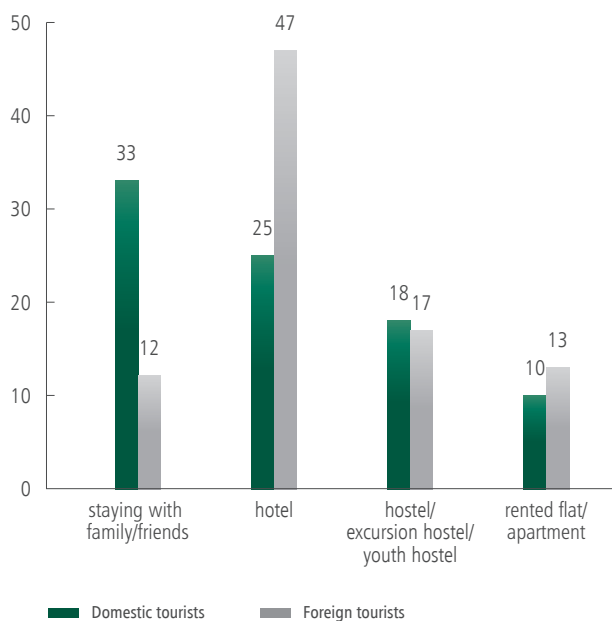
*data from establishments included in the report

Source^{2, 7}



93% of tourists who visit Warsaw spend the night in the capital⁸

Main types of accommodation used by tourists (%)⁸



highest growth in the first half of the year since 2012 when Warsaw was the host of UEFA EURO 2012™

↑ **5.9%**

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

*data from the first half of 2016 compared to the same period in 2015

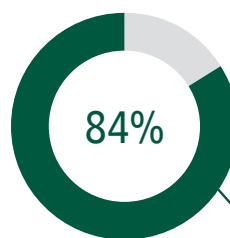
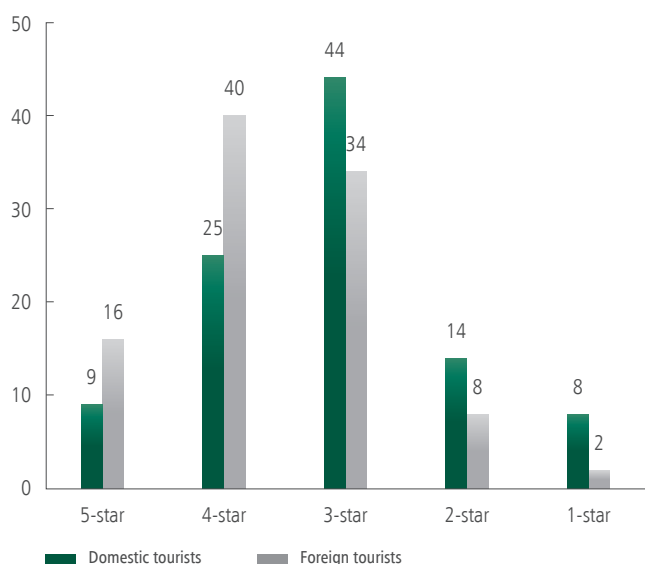
↑ **9.1%**

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

*data from the first half of 2016 compared to the same period in 2015

Source⁹

Standard of hotels used by tourists (%)⁸



of tourists have a positive opinion of tourist accommodation in Warsaw*

*individuals who made use of these kinds of services
Source⁸



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 **"Michelin Main Cities of Europe 2016" Red Guide**.

14 hotels from Warsaw 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 292
Gdańsk – PLN 287
Wrocław – PLN 265



PLN 281

average price of a double room in 2016 according to hotel search site trivago.pl

Poznań – PLN 241
Katowice – PLN 212
Łódź – PLN 187

Source¹¹



4. TOURIST ATTRACTIONS

TOURIST ATTRACTIONS – APPROXIMATE TURNOUT AND SELECTED EVENTS

The Royal Łazienki Museum in Warsaw^{1, 2, 3, 4}



2,100,000

After 5 years of revitalisation, the Old Orangery is again open to visitors. In recognition of the refurbishment and restoration of the Old Orangery and Royal Theatre, the Museum won the Award of the European Business Club Poland.

The Royal Łazienki has a new resident. After a long wait, a young peacock hatched in natural conditions in the Park.

Museum of King Jan III's Palace at Wilanów^{5, 6, 7, 8}



3,030,000

Visitors will once again be able to see the museum's highly valued 18th century furniture, which was lost during World War II, and has now returned following completion of conservation work.

The outdoor "King's Magic Garden" exhibition celebrated its fifth season. Visitors were able to see baroque plants, classical music and light shows as well as 3D light mapping.

National Museum in Warsaw^{9, 10, 11, 12, 13}



311,000

A group of children prepared a temporary exhibition as part of the educational "Anything Goes" Museum project. It was nominated for a "2016 Children in Museums Award" and won a Grand Prix Sybilla 2016 Award for Museum Event of the Year.

The Museum opened the "Brescia. Renaissance in Northern Italy" temporary exhibition presenting 50 pieces from masters of the Northern Italian Renaissance.

The Royal Castle in Warsaw – Museum^{14, 15, 16}

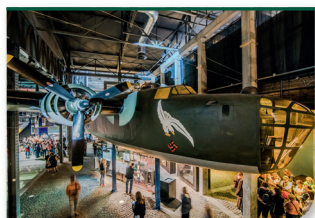


668,000

The Royal Castle has become a member of a prestigious group of museums around the world belonging to the Google Cultural Institute programme. As of 2016, internet users can take a virtual tour of the museum.

The opening of the "Sacrum Poloniae Iubileum 966-2016" temporary exhibition allows visitors to see motifs and events connected to the beginnings of the Polish nation and its Christianisation.

The Warsaw Rising Museum^{17, 18, 19}



625,000

1,600 different mementos have been donated to the Museum including a pre-war State Development Bank of Poland (BGK) ID punctuated with a bullet hole and an "Erika" typewriter.

The "Quantum of Peace" temporary exhibition created by PanGenerator group won a Design Gold at Cannes Lions awarded to the world's best advertising agencies.

POLIN Museum of the History of Polish Jews^{12, 20, 21, 22, 23}



584,000

The museum was honoured with the prestigious EMYA European Museum of the Year Award 2016, in appreciation of its creation of a permanent exhibition, a programme of temporary exhibitions and its educational work.

The Museum was awarded a Sybilla 2016 in the "Art Exhibition" category for the "Frank Stella and Synagogues of Historic Poland" temporary exhibition, which was written about in the "Washington Post" and "Daily Mail", and the New York art website Hyperallergic deemed it one of the 15 most important exhibitions in the world of 2016.

The Fryderyk Chopin Museum in Warsaw^{24, 25, 26}



97,000

Modern images of Chopin, guided tours and three piano recitals were just some of the attractions that visitors could expect to see during the Long Night of Museums 2016.

The Museum was one of only 3 institutions in Poland to be represented by the Adam Mickiewicz Institute at the renowned International Symposium on Electronic Art in Hong Kong.

Centre for Contemporary Art Ujazdowski Castle^{29, 30, 31, 32}



177,000

When it opened, "What is lost is at the beginning", Angelika Markul's temporary exhibition, was the largest ever in Warsaw for the artist who now lives and works in Paris.

The temporary exhibition "Mouth to Mouth", Poland's first review of the work of international group "Slavs and Tatars", was the first time all the group's cycles had been gathered together and presented in one institution.

Copernicus Science Centre^{37, 38, 39, 40}



1,103,000

The "Sail or Sink" exhibition demonstrated the power of water and how to harness this element. Visitors could see robots exploring the bottom of the sea and escape from a sinking ship.

The main theme of the "Przemiany" Festival (Transformations), organised by the Copernicus Science Centre from 2011, was 'Temptation of Immortality'. During the Festival, visitors could enjoy 'Breakfast by the River', an electronic music concert, workshops, discussions and film screenings.

Palace of Culture and Science in Warsaw^{44, 45, 46}



612,000*

Approx. 150,000 people visited "Titanic. The Exhibition", which included, among others, 200 objects retrieved from the sunken ship and a full-size reconstruction of its interior.

A new virtual 3D tour called "#HoryzontHistorii" (Historical Horizon) allows users to see what Warsaw looked like in the 11th, 14th and 16th centuries and in 1944 after it was destroyed in the Warsaw Uprising.

*number of visitors to the Viewing Terrace on the 30th floor of the Palace

Museum of Technology and Industry^{27, 28}



105,000

The "Digital Dreamers" exhibition opened, dedicated to Polish games, both classic, like Robbo and Electro Body, and modern.

Paweł Strękowski's exhibition entitled "He who lubricates, drives", dedicated to vehicles and machines which have disappeared from our field of vision or which only live in museums, was opened to visitors.

Zachęta – National Gallery of Art^{33, 34, 35, 36}



129,000

The "Money to Burn" temporary exhibition tries to trace the visual representations of wealth from the 1990s, when Poles went money-crazy lured by opportunities of making a quick buck, through disenchantment with neoliberal ideas, until this day.

The temporary exhibition entitled "Common Affairs" which opened in Berlin presents the work of Polish artists selected from among those who were finalists in the VIEWS competition. The exhibition met with very positive reviews both from the German public and critics.

PGE Narodowy Stadium^{41, 42, 43}



1,895,000

Over 27,000 spectators visited the PGE Narodowy Stadium during the LOTTO Warsaw Memorial for Kamila Skolimowska during which Anita Włodarczyk established a new hammer throw world record of 82.98 m.

The PGE Narodowy Stadium had 120,000 visitors during Verva Street Racing, and the LOTTO Warsaw FIM Speedway Grand Prix of Poland saw the world record attendance for speedway matches – 70,000 fans.

City Zoological Garden in Warsaw^{47, 48, 49, 50}



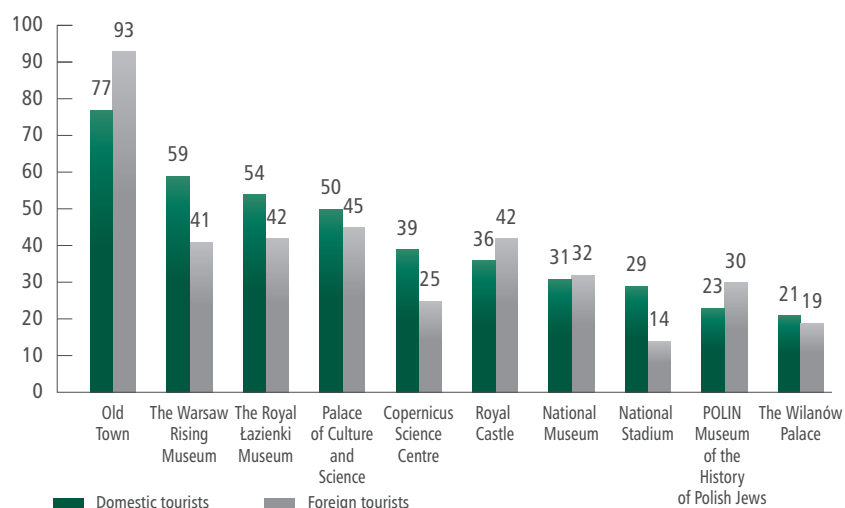
760,000

Warsaw's zoo welcomed 8,000 new animals in 2016, thanks to the expansion and completion of the New Aquarium in 2015.

In February, the star of the zoo, a baby giraffe called "Gortat", was named after its honorary sponsor, world famous NBA star Marcin Gortat. Baby Gortat celebrated his first birthday in November. A special 'birthday book' was put out for visitors who could write their birthday wishes for Gortat.

PREFERENCES REGARDING TOURIST ATTRACTIONS

Main places visited by tourists in Warsaw (%)*

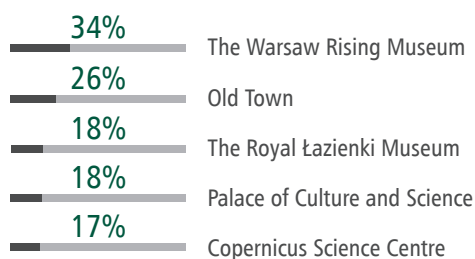


The new headquarters of the Katyń Museum in Warsaw's Citadel won the Architectural Prize of the Mayor of Warsaw in the category of "Public Service Architecture (Public Building)", among buildings completed in 2015^{52, 53}

*total percentage data is over 100% as respondents could indicate more than one place
Source⁵¹

The biggest tourist attractions in Warsaw according to tourists (top 5)*

Domestic tourists:

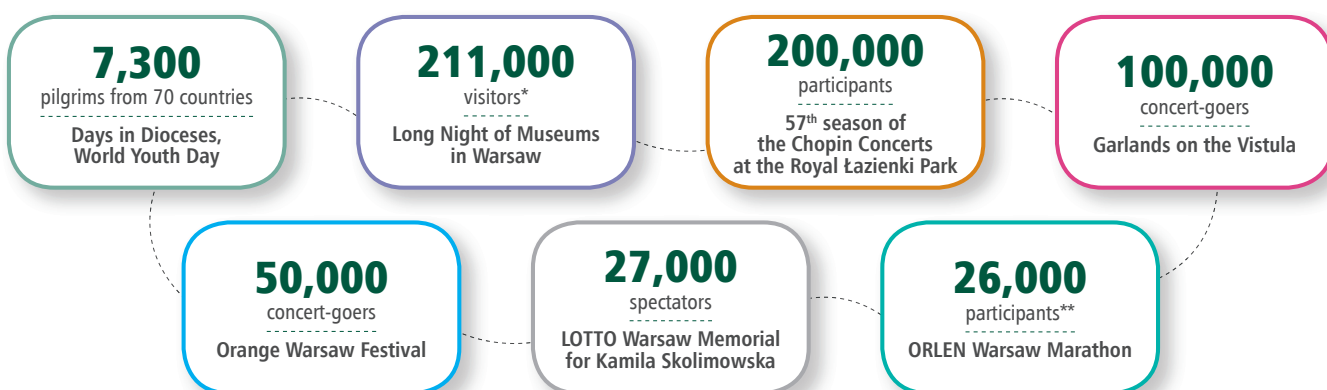


Foreign tourists:



*total percentage data is over 100% as respondents could indicate more than one place
Source⁵¹

Selected events – approximate turnout



*data from approx. 75% of all institutions that took part in the event **participants of the marathon together with accompanying events
Source^{54, 55, 56, 57, 58, 59, 60}

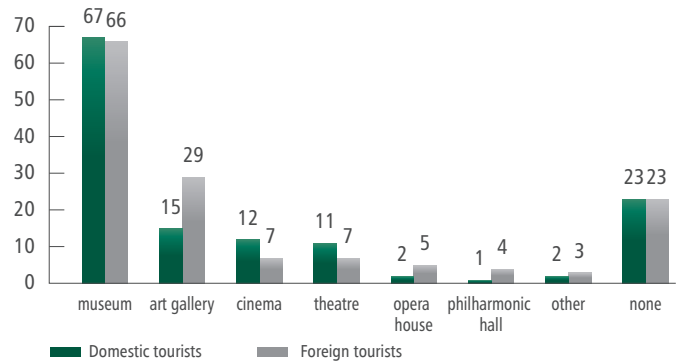
"The Jewish Culture Festival – Singer's Warsaw" named one of the top 5 tourism products of Mazovia in 2016 by the Regional Chapter of the Tourism Organisation of the Mazovian Region⁶¹



12% of tourists, while visiting Warsaw, planned to or participated in an event such as a concert, festival, fair, or sporting event⁵¹

Cultural institutions – visited by tourists while in Warsaw (%)*

21% of visitors
to Warsaw's cultural institutions
live outside Warsaw⁶²



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

Source⁵¹

GASTRONOMY

“Michelin Main Cities of Europe 2016” Red Guide⁶³

[Michelin star]
for Senses restaurant

[Michelin star]
for Atelier Amaro restaurant
(maintaining the title gained in 2013)

The Michelin Red Guide also mentioned
a total of 28 Warsaw restaurants



“Gault & Millau Polska 2016” Yellow Guide⁶⁴

[four chef hats]
awarded to Senses restaurant

[four chef hats]
awarded to Atelier Amaro restaurant
(maintaining the title gained in 2015)

[chef of the year]
Paweł Oszczyk
La Rotisserie restaurant

[chef of tomorrow]
Michał Bryś
L'enfant terrible restaurant



Warsaw Restaurant Week⁶⁵

More than **60 top restaurants**
participated in the 6th edition of the culinary festival,
which took place at the beginning of April.

The motto was “The blooming restaurant scene”
in reference to Spring, freshness,
new vegetables and edible flowers.

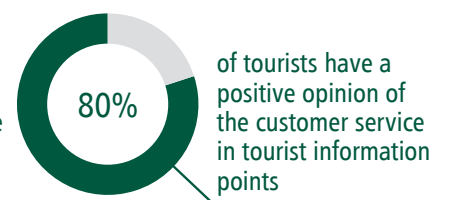
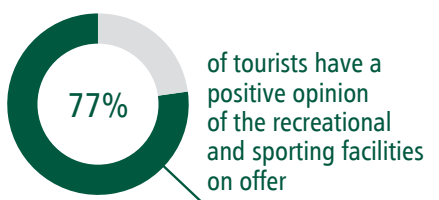
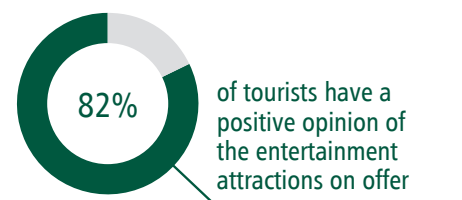
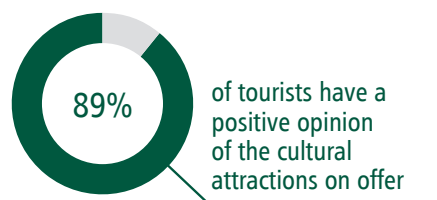
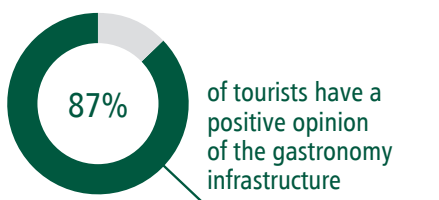
According to the website “Happy Cow”, Warsaw is a vegetarian and vegan-friendly city⁶⁶

The website, which has mapped out a worldwide network of
meat-free restaurants, described Warsaw as one of the most
welcoming places for vegans and vegetarians.
It is the only Eastern European city on their list.

Warsaw takes pride in having **30 vegan restaurants**.

SELECTED SERVICES ACCORDING TO TOURISTS*

*people who have used this type of service



Source⁵¹



5. APPEALING URBAN PLACES

Using one of Warsaw's Veturilo Public Bikes is an excellent way of seeing the city and discovering all alluring hotspots and enticing places.



Koszyki Market Hall



Poland's first **trade and restaurant market hall**, modelled on similar market halls in Rotterdam, London, Oslo and Florence. Koszyki is located in a revitalised Art Nouveau building once known as the Folk Bazaar.^{1,2}

This buzzing location brings together trade, services, restaurants, culture and entertainment. Koszyki has its own stylish music in the common areas of the Market Hall.^{1,3}

Visitors can find 18 restaurants, 11 shops and Koszyki Bazaar open from morning till evening every day of the week.²

In November 2016 Koszyki won a prize in the "New Concept of the Year" category, awarded by CIJ, a developer and real estate magazine for the Central and Eastern European market.⁴



Night Market

Warsaw's first ever **street food night market** located on the postal platforms of Warsaw's former Main Railway Station (Warszawa Główna).^{5,6}

It brings together stalls with delicious food from all corners of the world, independent traders, merchants, and music modelled on the famous night markets of Asia.^{7,8}

Warsaw's Night Market gathers together 20 of the most enticing street food sellers with a wide range of culinary treats.⁸



The Market is open every summer weekend from evening till late at night.^{8,9}



Breakfast Market

The market has a picnic atmosphere where families and friends can eat **breakfast outside on the grass**, take part in workshops and do some shopping.¹⁰



Every weekend visitors have the chance to taste regional specialities from around Poland and the world as well a wide range of original dishes served up for the market.¹⁰

In the summer season, the Breakfast Market takes place outside in the open air in greens and parks in, among others, the districts of Żoliborz, Mokotów, Praga and Powiśle neighbourhood.¹⁰

In the winter season, from 2016, the market takes place in the hall of the Warsaw Bus Company (MZA) in Żoliborz district, which means visitors have the added attraction of seeing the MZA vintage buses.^{10, 11}

Defilad Square

The idea behind “Defilad Square” is to create an **open urban place** at the very centre of Warsaw, accessible and attractive for both residents and tourists.^{12, 13}

During the summer, the Square becomes an arena for a host of freely available cultural and recreational events.¹²

The central point of the Square is a long table, a symbolic space around which there is a series of communal events, including meet-ups, debates, workshops, public consultations and bottom-up initiatives.¹³



During the 3rd edition and thanks to cooperation from various cultural institutions, NGOs and independent artists, Defilad Square hosted an open-air cinema, a summer theatre and 148 events including the Mozart Festival, the JAZZBANDBIGBAND dance party, the international FUTUWAWA competition, a fiesta and concert as part of the “Wyłącz System” (Switch Off) project and the Great Antique Shop.^{12, 14}



Warsaw's Praga District

Thanks to the revitalisation of the district, Warsaw's Praga **is changing** – a large number of buildings and pre-war tenements have been renovated and have regained their former glory.¹⁵

In 2016, the Praga Museum of Warsaw, an institution protecting and popularising the heritage of the whole area along the right bank of the Vistula, was visited by 50,000 people.^{16, 17}

Ząbkowska street once again transformed into the heart of Praga culture and entertainment during "Open Ząbkowska". It is now the second season in a row where the street is closed to traffic every summer weekend becoming a promenade and stage during which visitors can take part in concerts, theatre shows, exhibitions or workshops for children and teenagers.^{18, 19}

The Praga Zoo Market was established in 2016, modelled on the Berlin vintage bazaar and flea market in Mauerpark. Visitors can find porcelain, glass, fabric, retro clothes and accessories, toys, old books, vinyl as well as the work of modern designers.^{20, 21}

Praga's atmospheric club area centred around 11 Listopada (11 November) street with a mix of trendy alternative clubs is a must for lovers of city nightlife.^{22, 23}



The Centre of Creativity Targowa, a business incubator for entrepreneurs working in the creative sector, opened in 2016 in Praga. A year earlier, Google Campus Warsaw appeared on the map in Praga.^{24, 25, 26}



Warsaw's River Vistula



The Vistula is a semi-wild river that runs through Warsaw, and the Vistula area is part of the **Natura 2000 network**.²⁷

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.²⁷

A whole variety of activities can be pursued along and on Poland's longest river: walking, biking, winter cross-country skiing, archery, boules, taking cruises on the river sightseeing boat or catamaran, motorboating, standup paddleboarding and wakeboarding not to mention traditional barges and punts.²⁸

Visitors can relax by the river on one of 8 official beaches, including the new Romantic Beach in Wawer district. Some of the beaches have: piers, playgrounds for children, beach volley courts, outdoor gyms, bonfire sites, showers, beach huts as well as deckchairs to rent for free and beach recreation equipment.²⁸



Other than the workshops, shows and river sport attractions that took place during the annual Vistula Festival, entitled "Vistula – Warsaw's Element" in 2016, there was also a spectacular illuminated motorboat, boat and catamaran sailby.²⁹

Warsaw was included in the Guardian's "10 best urban beaches and city riversides in Europe".³⁰

Multimedia Fountain Park



The largest investment of its kind in any urban space in Poland.³¹

Four fountains located beside the Vistula close to the Old Town.³²

During summer (May to September), multimedia shows take place here every weekend. These spectacular **"water-light-sound" performances** use LED spotlights and lasers.³²

The premier shows attracted 70,000 visitors in the first weekend and over 1,000,000 were in attendance over the whole 2016 season.³³

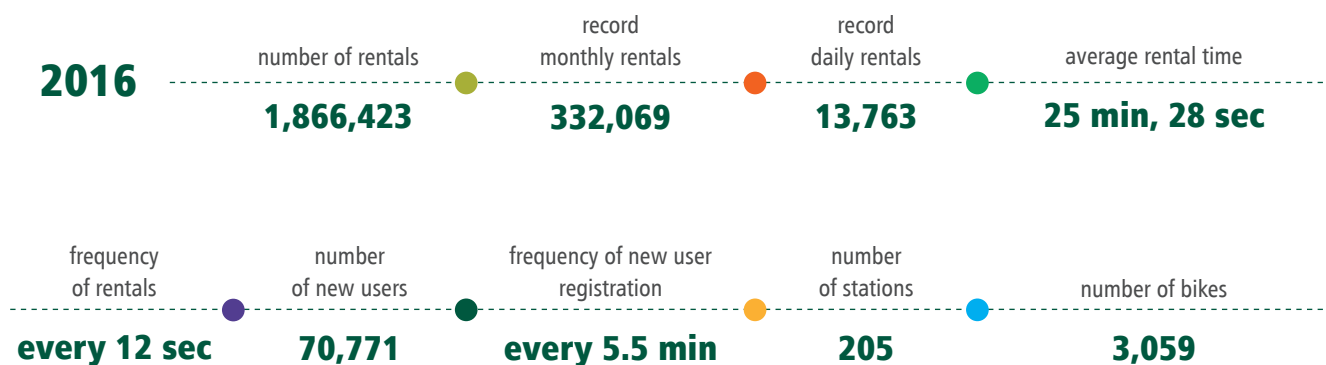
The performances in 2016 were inspired by the Warsaw mermaid legend.³⁴

The composer of the music used for all the shows was Jean Michel Jarre.³⁵



VETURILO - THE WARSAW PUBLIC BIKE³⁶

WARSAW'S BICYCLE REVOLUTION IS NOW IN ITS FIFTH YEAR WITH OVER 450,000 PEOPLE RENTING BIKES ALMOST 8,000,000 TIMES BETWEEN 2012-2016



URBAN SPACE IN WINTER – FESTIVE STREET ILLUMINATIONS

Warsaw's streets and squares have been lit up with festive lights for the **ninth year in a row**. The city was illuminated for two months from the beginning of December 2016.^{37, 38}

This year the lighting design was inspired by snowflakes and ice crystals.³⁹

The "Warsaw's Winter Dream" illuminations used **4,500,000** low energy LEDs and diodes and **1,300** decorations.⁴⁰



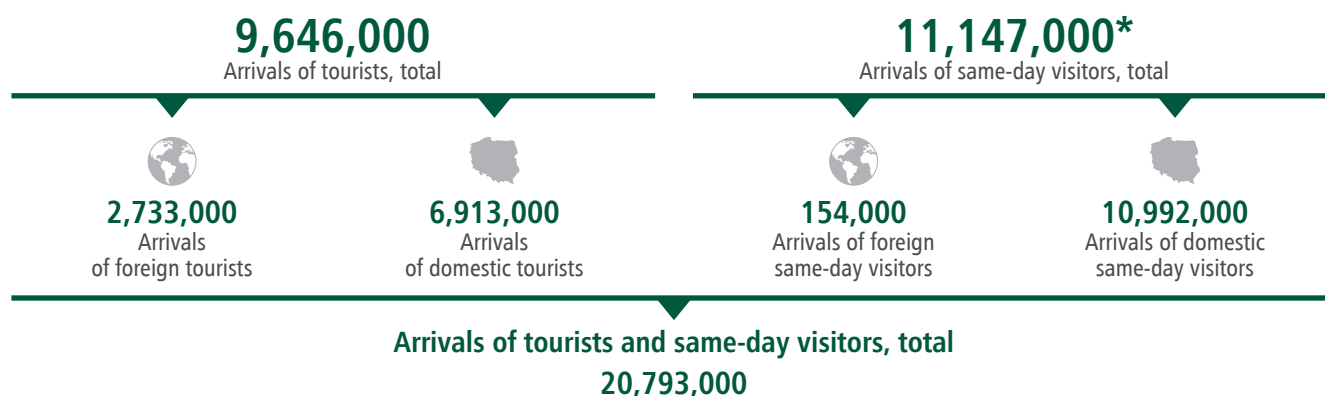
As well as the **27-metre tall Christmas tree** on Zamkowy Square, Warsaw was lit up by **13 free-standing themed decorations** across the city (for example, a giant peacock in the Royal Łazienki Park).^{41, 42}

The total length of illuminations was over **20km long**.⁴¹



6. TOURIST TRAFFIC CHARACTERISTICS

Estimated number of arrivals of tourists and same-day visitors



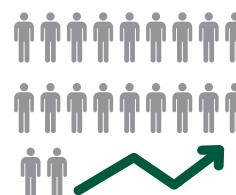
*due to rounding up, the aggregated number of arrivals of same-day domestic and foreign visitors does not equal the total number of arrivals of same-day visitors

Source¹

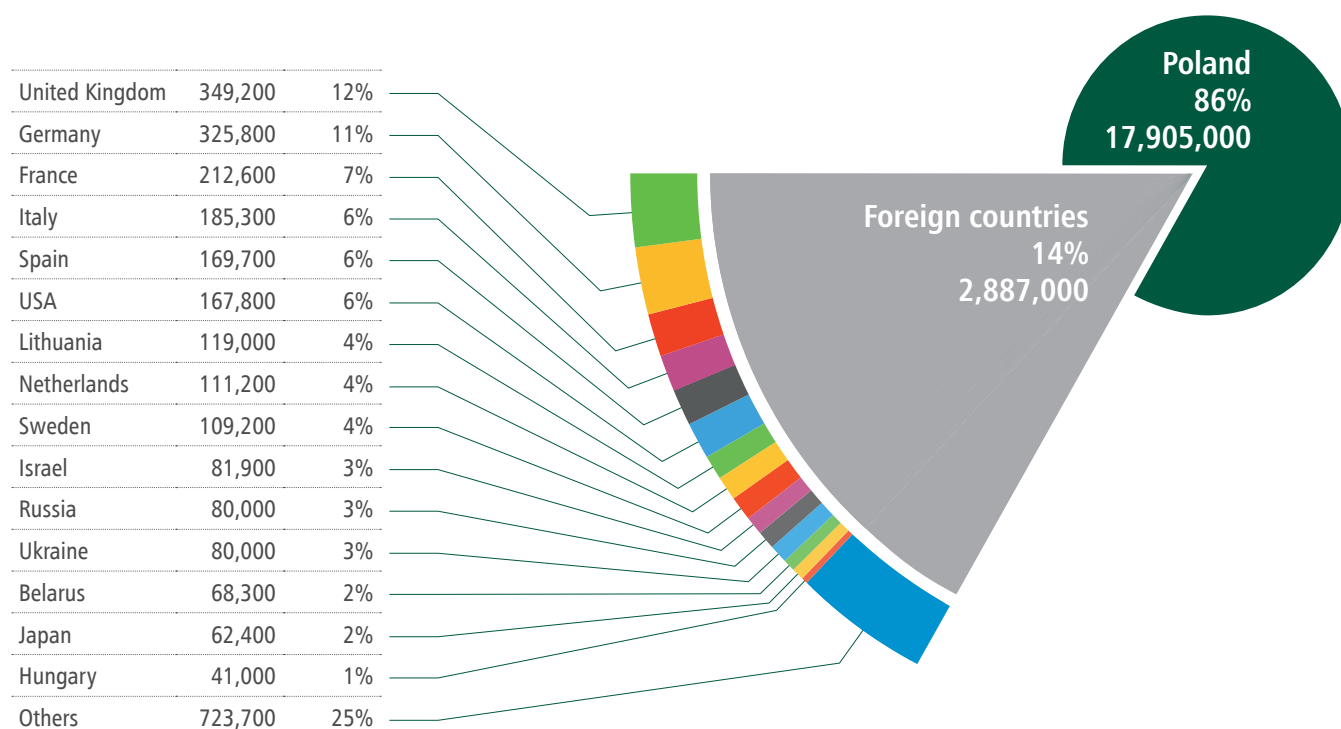
Mastercard Global Destination Cities Index²

[72nd place]

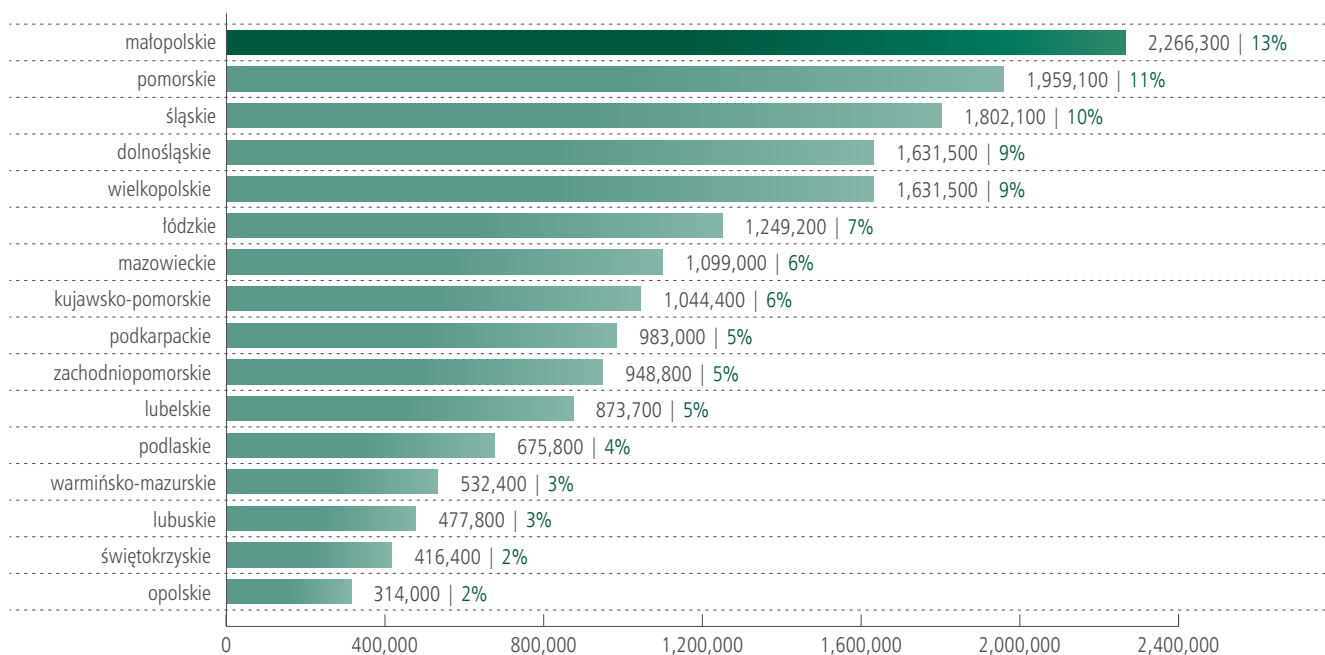
in a ranking of world cities
in terms of number of foreign tourists



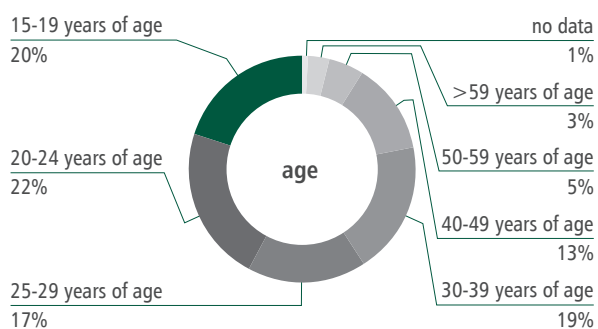
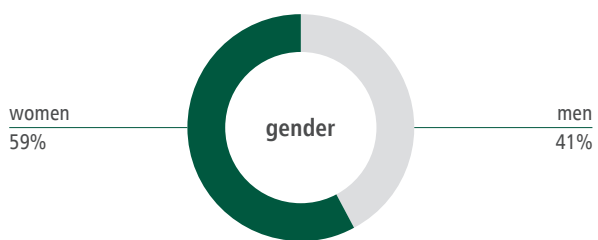
Estimated number and percentage share of tourist arrivals and same-day visitors by country of origin¹



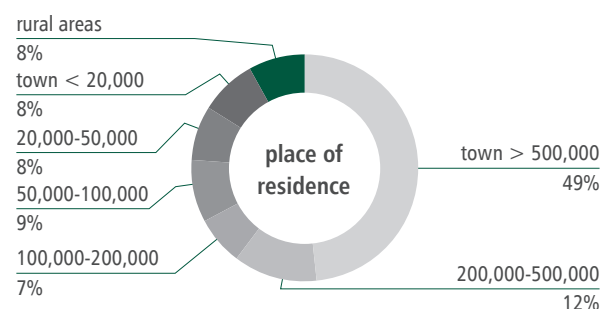
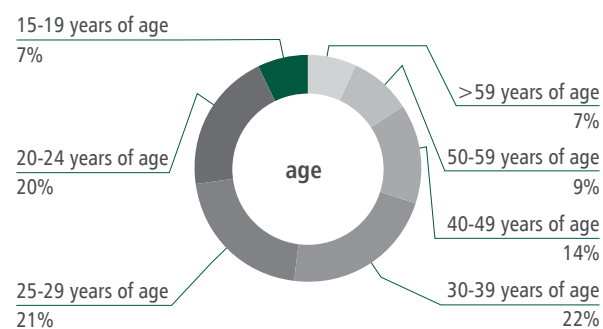
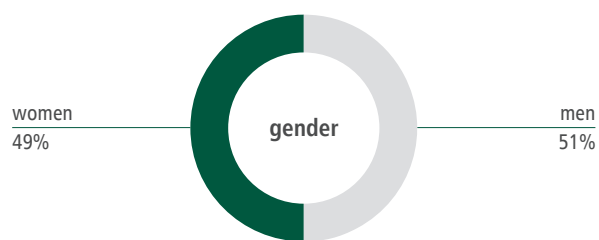
Estimated number and percentage share of tourist arrivals and same-day visitors by voivodship (region)¹



Profile of a domestic tourist³

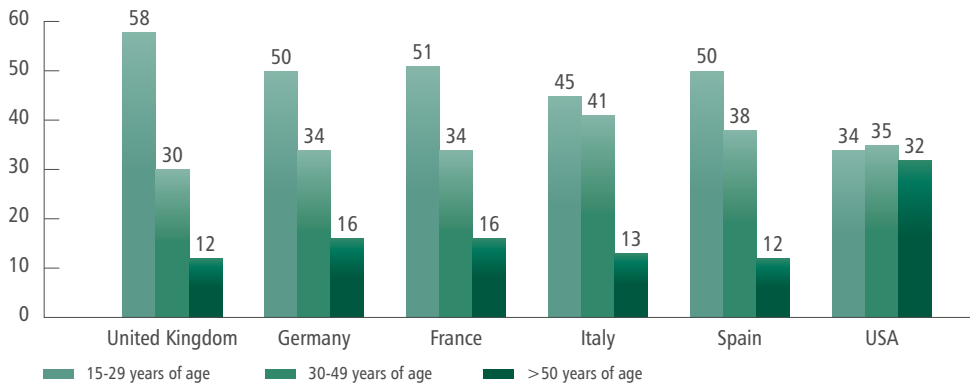


Profile of a foreign tourist³

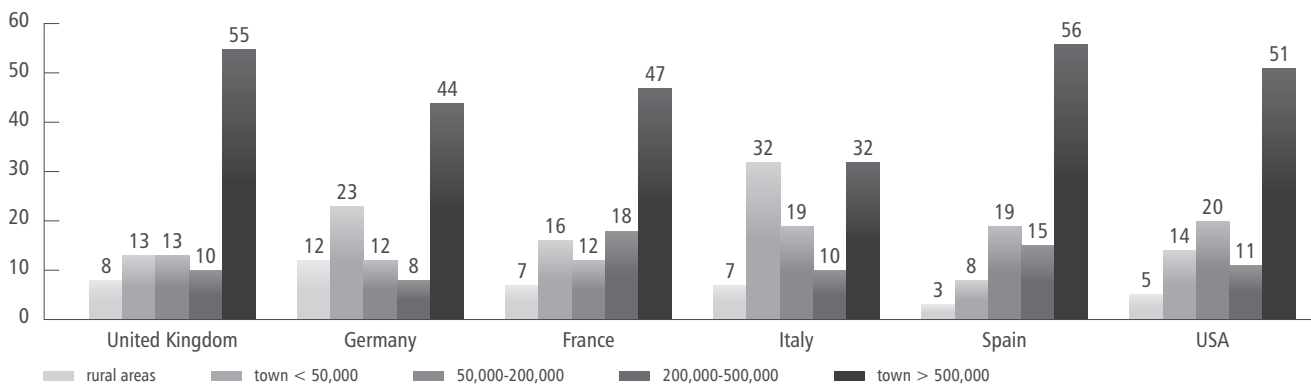


Profile of a foreign tourist – main countries of origin (%)³

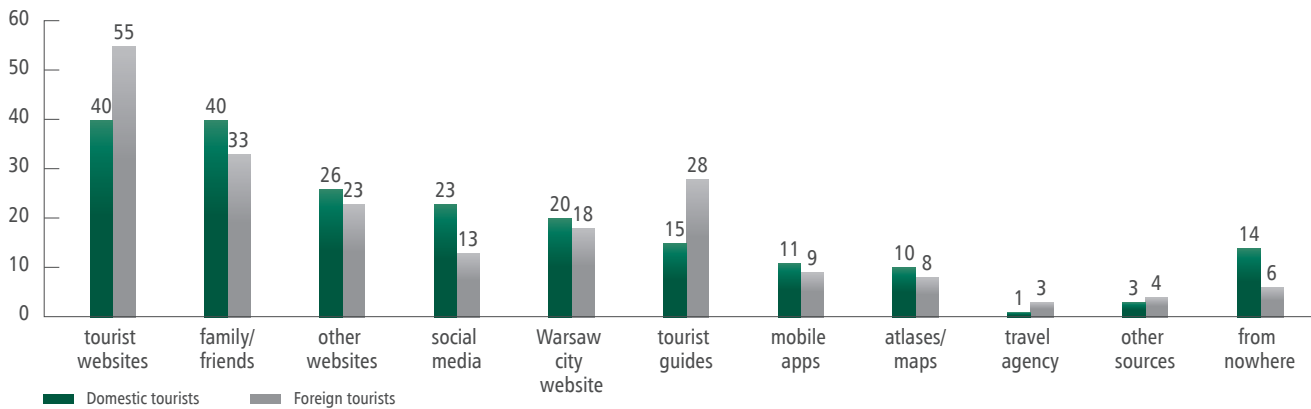
Age



Place of residence

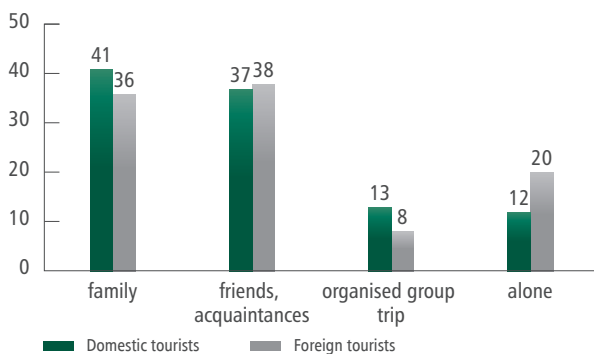


Sources of information about Warsaw (%)^{*}



^{*}total percentage data is over 100% as respondents could indicate more than one source
Source³

Travel companions while going to Warsaw (%)^{*}



^{*}total percentage data is over 100% as respondents could indicate more than one answer
Source³

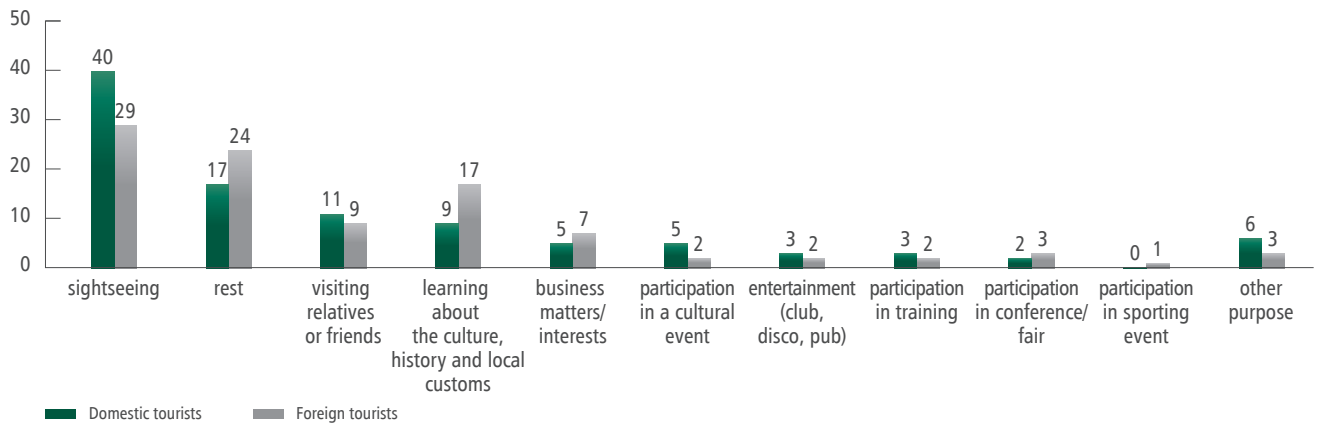


74% of tourists organise their trip to Warsaw by themselves, for 10% of tourists, the trip is organised by family or friends³

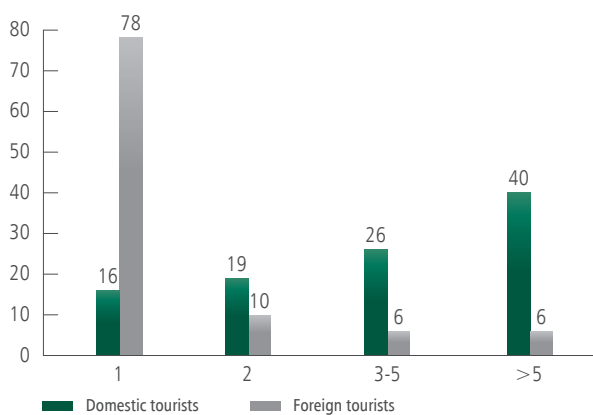


77% of tourists come to Warsaw directly from their place of residence³

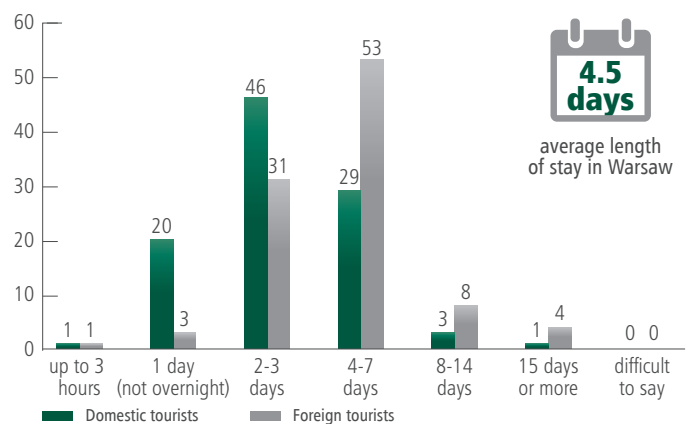
Main purpose of visiting Warsaw (%)³



Number of visits to Warsaw (%)³

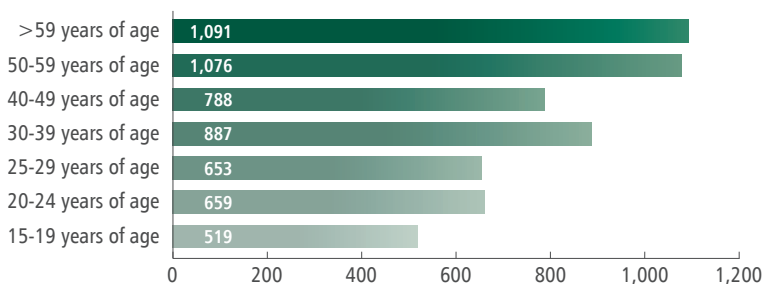


Length of stay in Warsaw (%)³

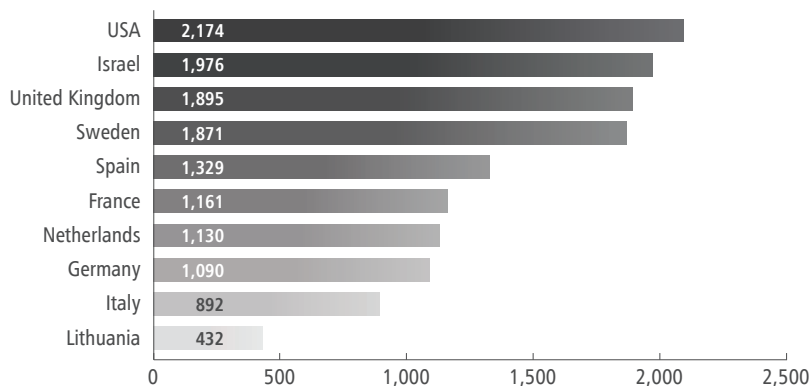


Average declared amount spent per person during stay in Warsaw³

By age (PLN)



By country of origin (PLN)



PLN 739



average declared amount
spent per person during
stay in Warsaw
(PLN 402 - domestic tourists,
PLN 1,482 - foreign tourists)



7. 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, 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, events) – 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 and colleges with conference rooms).



From the perspective of the meetings industry, Warsaw is **the best connected Polish city in terms of international air traffic**, and has the best hotel conference infrastructure.

Source¹

Warsaw according to the world-famous ICCA ranking (International Congress And Convention Association)^{2, 3, 4, 5}

30th place

71 association meetings*
(an increase of 97%
over the past 10 years)

19th place

among European cities

1st place

among Polish cities
(Kraków came in 2nd, 65th in the world
ranking, Wrocław came in 3rd, 98th
in the world ranking)

Warsaw is ahead of cities such as Munich, New York and Sydney

*meetings which take place on a regular basis, involve more than 50 participants and migrate between at least three countries

The NATO Summit in Warsaw – a key congress event in Warsaw in 2016^{5, 6, 7, 8}

largest summit in the history
of the alliance in which **2,000
delegates** from 50 countries
took part, including 18
presidents, 21 prime ministers,
41 ministers of foreign affairs
and 39 ministers of defence

over **4,000 rooms** in 20 hotels
reserved for participants
of the summit



one of the **most important
events** in world politics
in 2016

PGE Narodowy Stadium
housed rooms and facilities
for heads of state, including a
**copy of the White House Oval
Office** for US President
Barack Obama

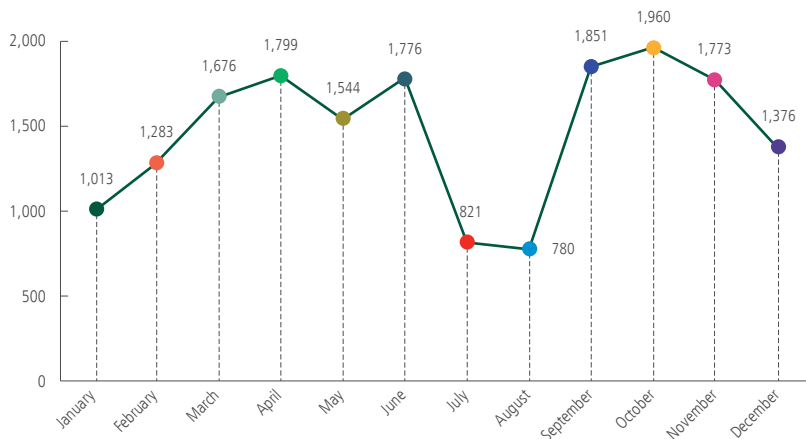
over **2,000 journalists**
obtained accreditation for
working on the summit

WARSAW CONFERENCE MARKET – SIZE AND CHARACTERISTICS

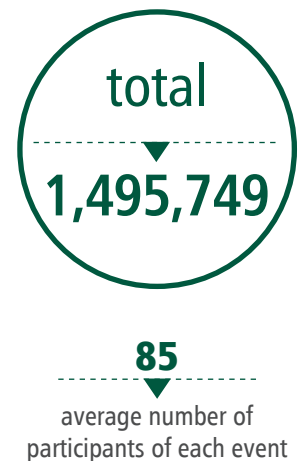
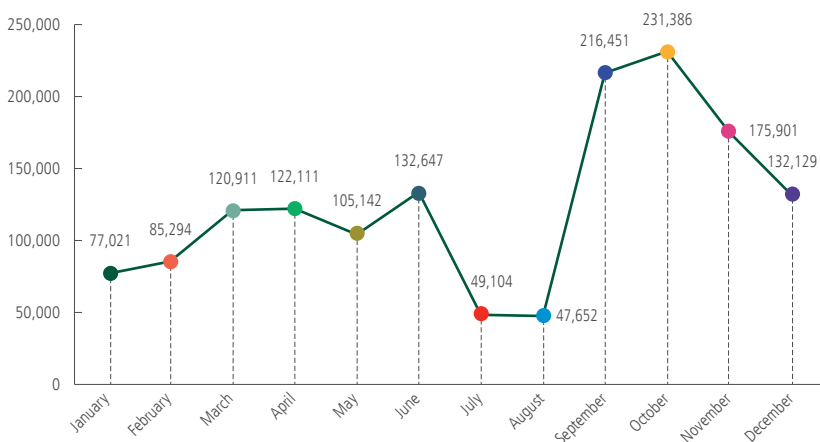
The diagrams presented below are based on data from the Demand Outlook system maintained by Z-Factor, which collected detailed information about over 17,500 events that took place in 2016 in Warsaw.

Demand Outlook does not include all conference venues in Warsaw – it focuses primarily on hotel establishments whose potential and capabilities are of key significance to the conference and events market in Warsaw. These are mainly 5, 4, and 3-star hotels. Their share in the total number of events in the study was almost 84%, while in terms of space rented – almost 75%.¹

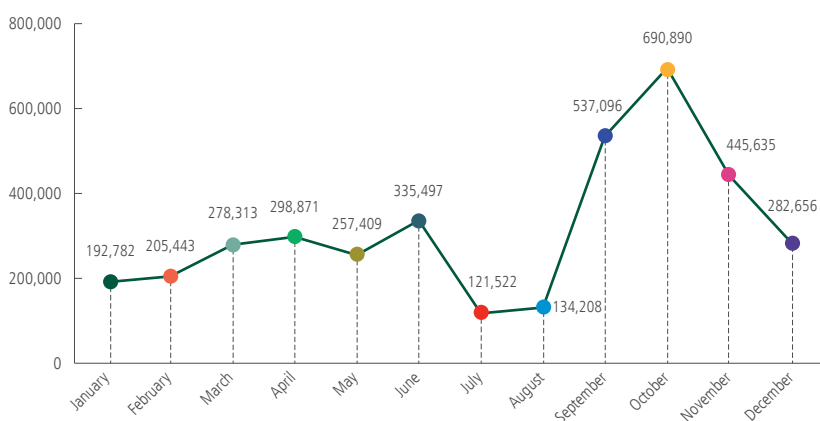
Number of meetings by month^{1, 9}



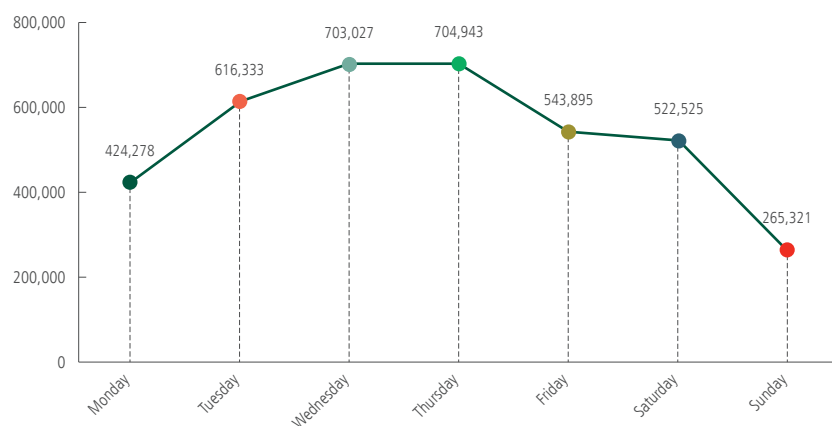
Number of participants of meetings by month^{1, 9}



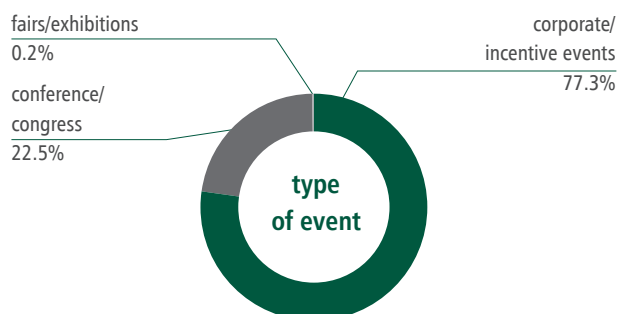
Space used by month (m²)¹



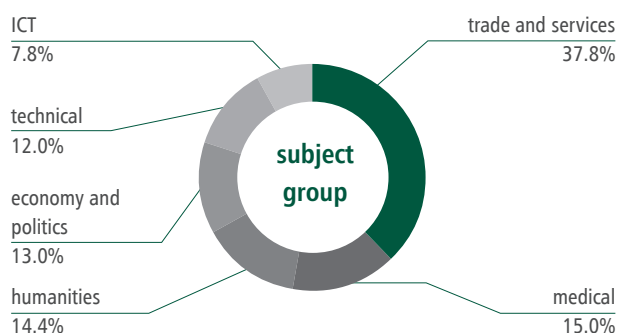
Space used by day of the week (m²)¹



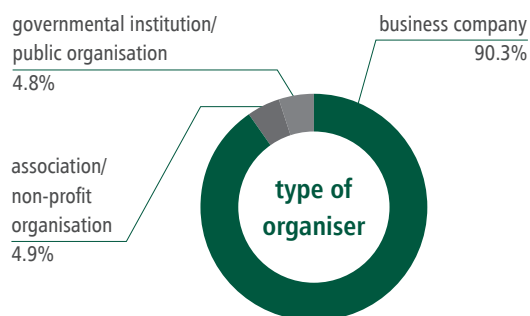
Events by type¹



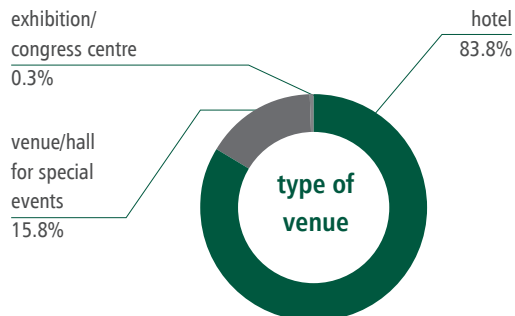
Events by subject group¹



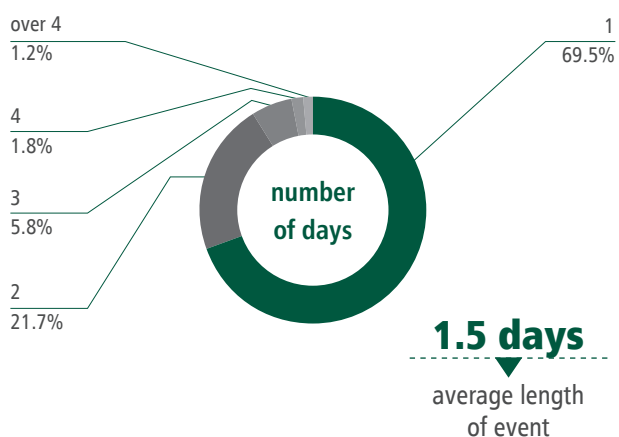
Events by type of organiser¹



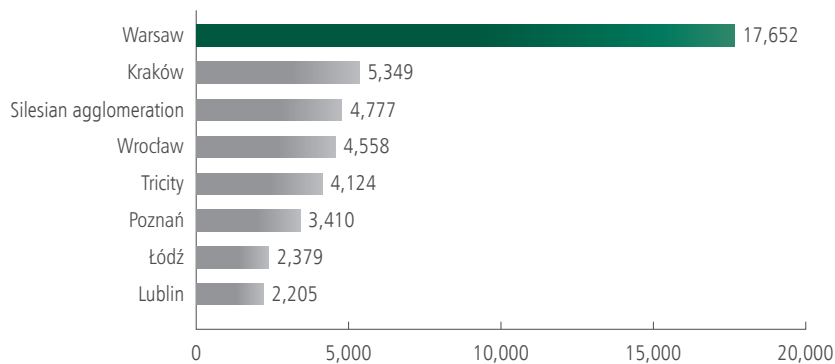
Events by venue type¹



Events by duration^{1, 9}



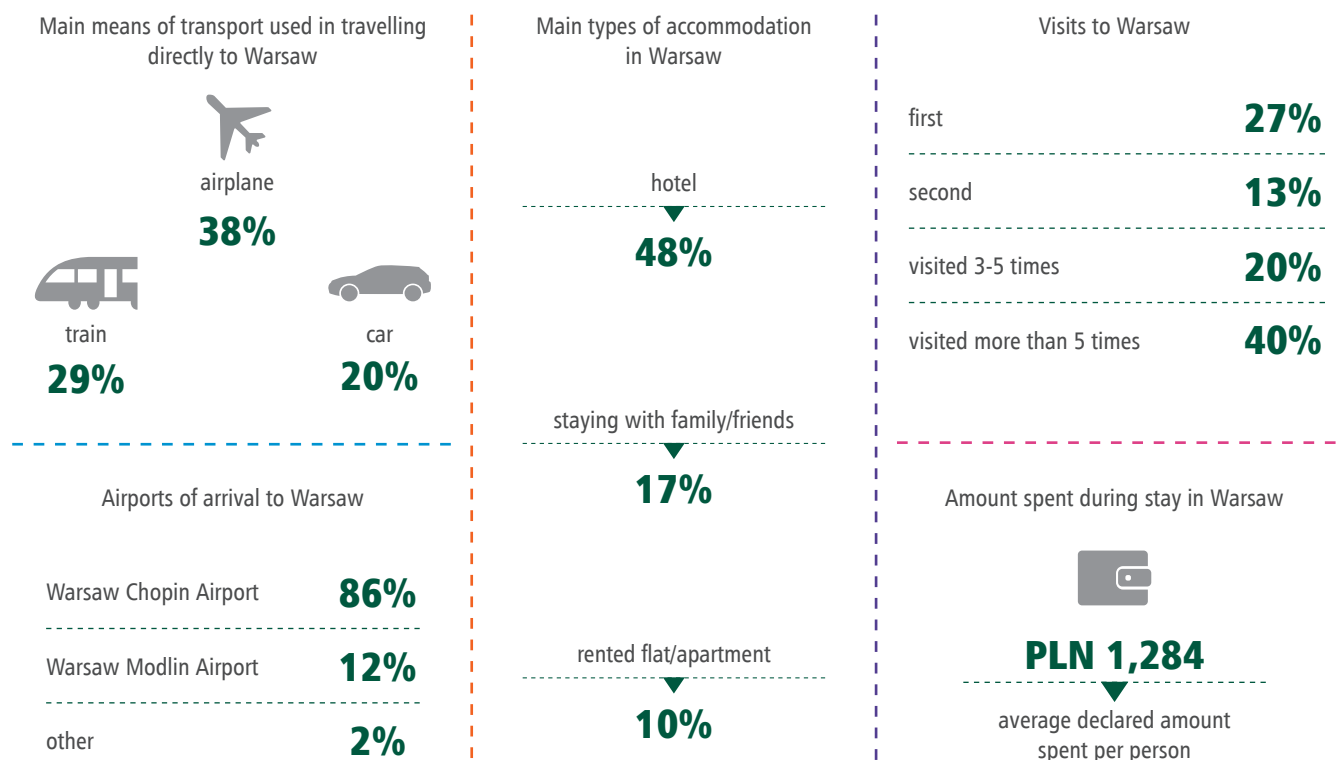
Number of events in selected Polish cities⁹



EXHIBITION SPACE OF SELECTED VENUES¹⁰



TOURIST TRAFFIC CHARACTERISTICS – BUSINESS TOURISTS¹¹





8. WARSAW'S IMAGE

WARSAW ACCORDING TO TOURISTS¹



*on a scale of 1 to 10

Tourists most often list the following in terms of particularly positive impressions of Warsaw:

interesting places and monuments



friendly people



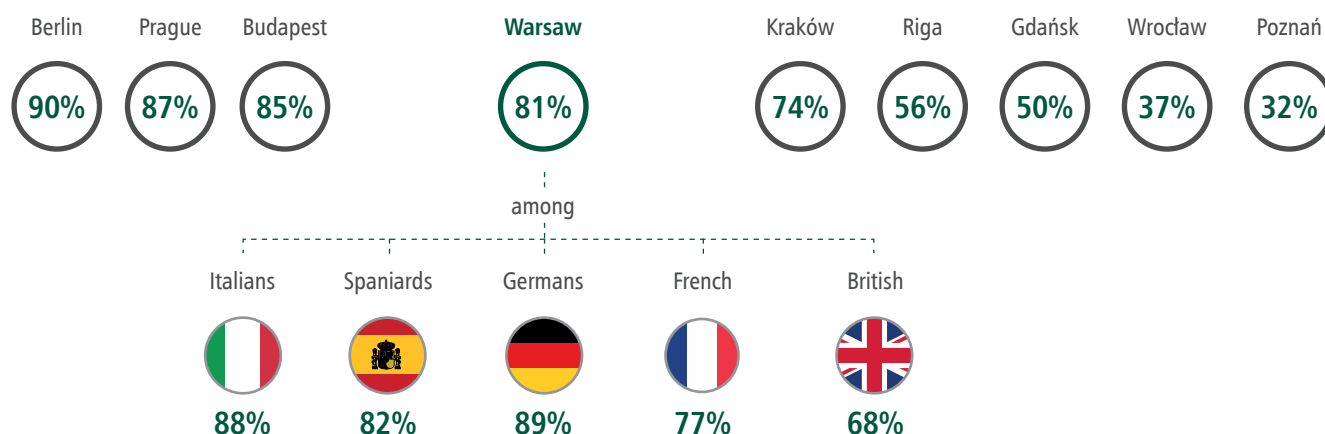
good gastronomy



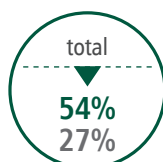
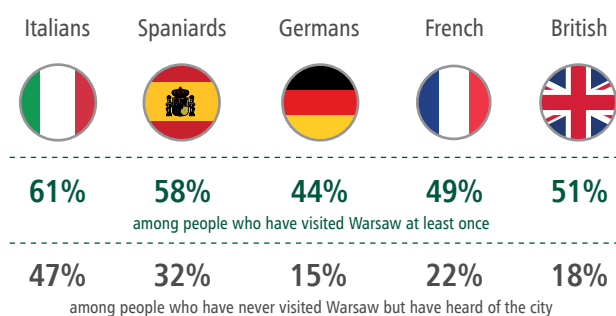
WARSAW'S IMAGE AMONG RESIDENTS OF SELECTED EUROPEAN COUNTRIES*²

*France, Spain, Germany, United Kingdom, Italy

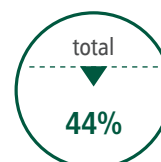
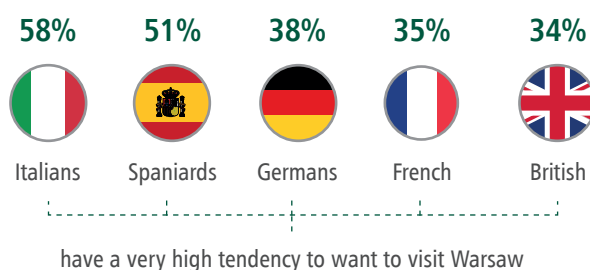
Knowledge of Warsaw compared with selected European cities



Positive impressions associated with Warsaw*



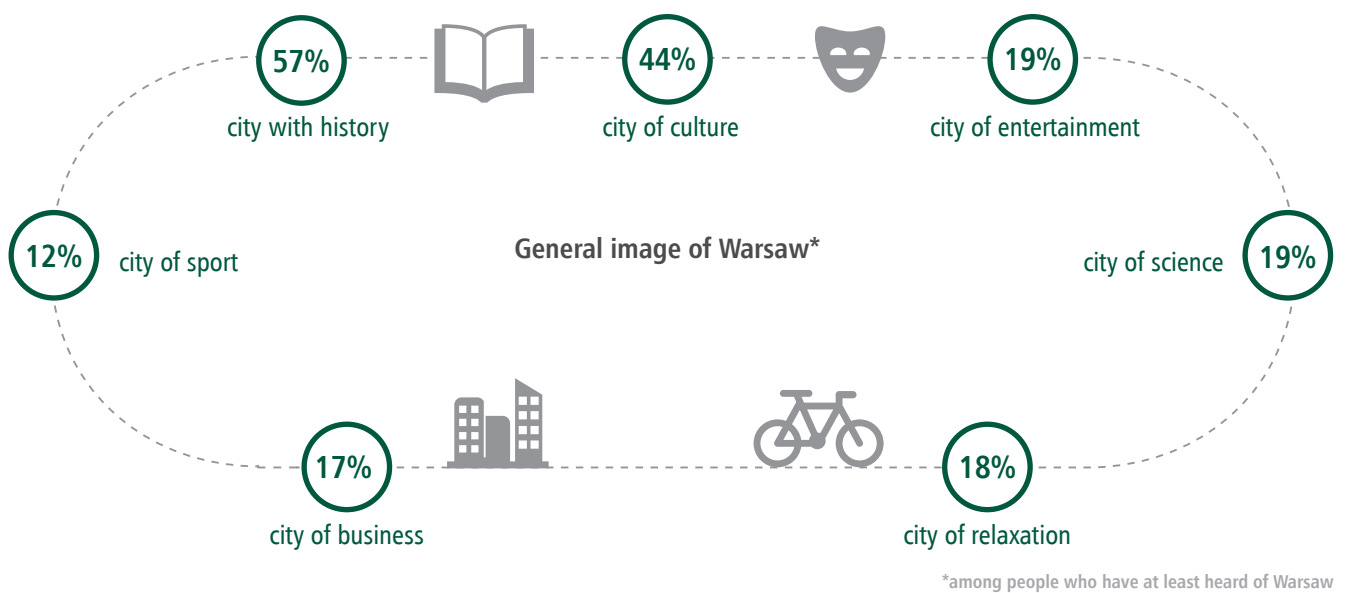
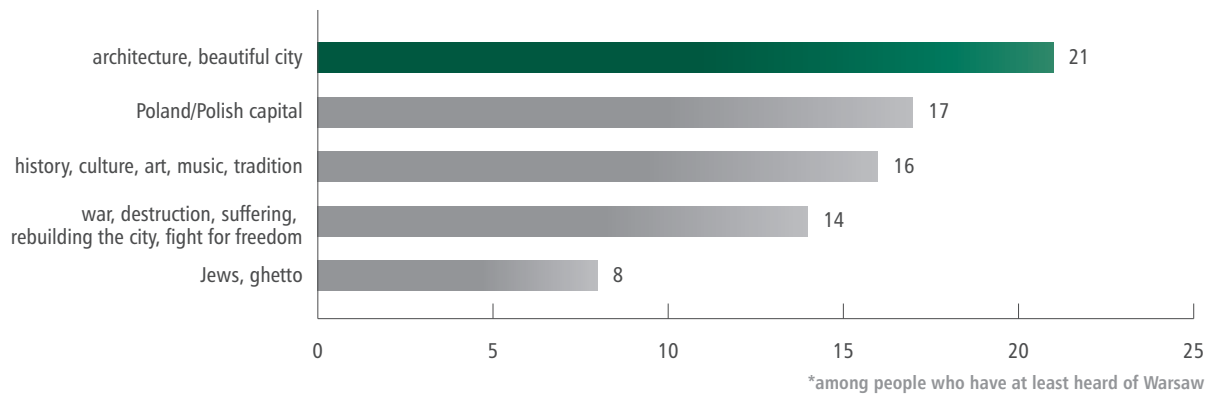
Tendency to want to visit Warsaw*



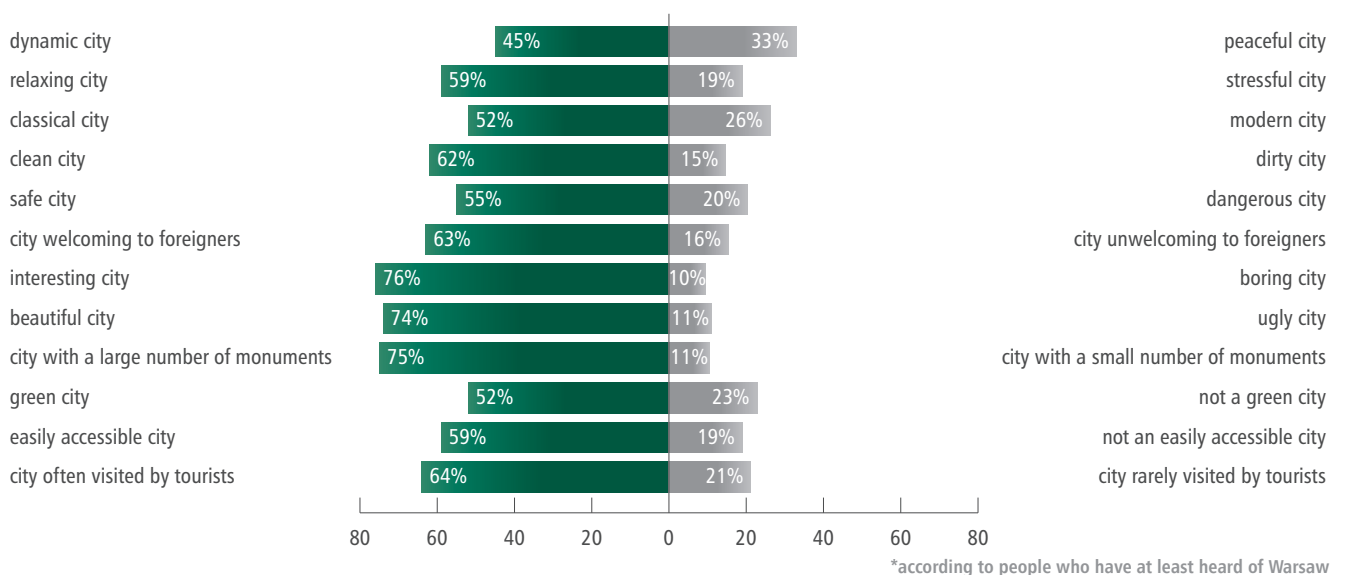
*among people who have at least heard of Warsaw

*among people who have at least heard of Warsaw

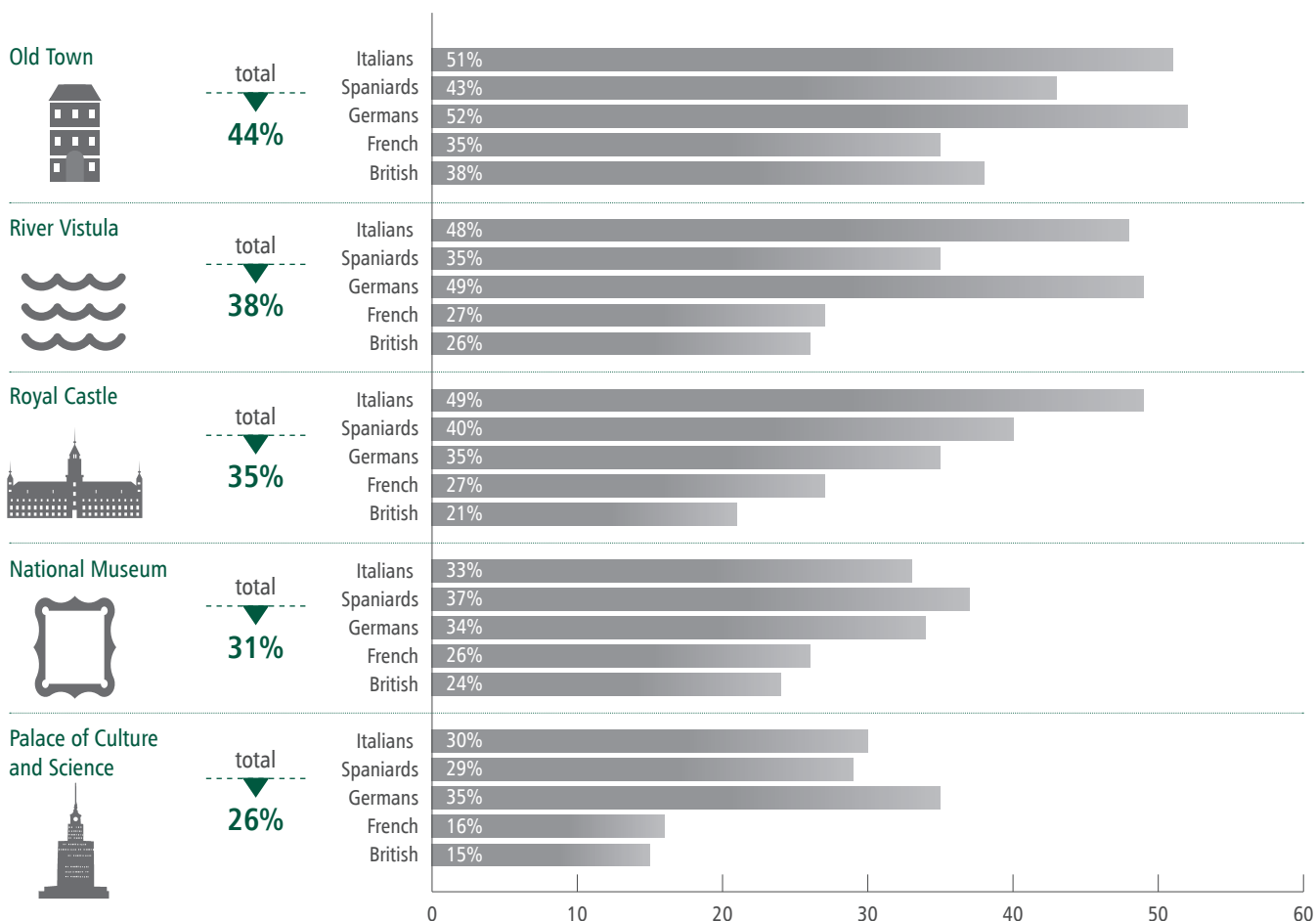
Selected spontaneous associations with Warsaw (%)*



Warsaw characteristics*



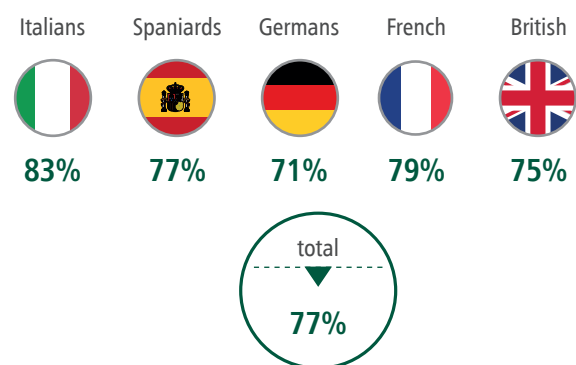
Most recognisable places and monuments associated with Warsaw*



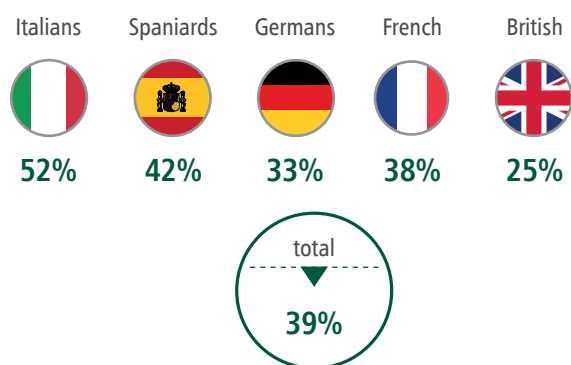
*among people who have at least heard of Warsaw

Recognisability of prominent people associated with Warsaw*

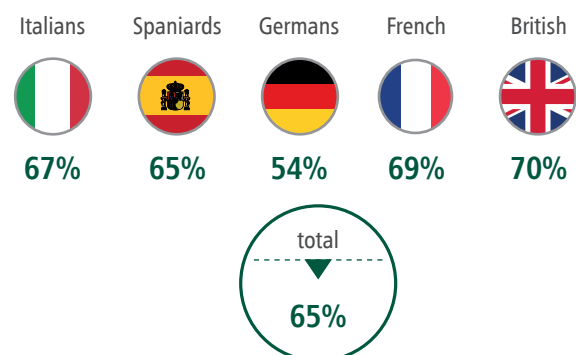
Knowledge of Fryderyk Chopin



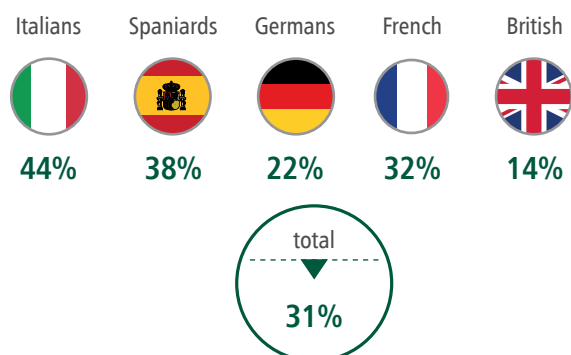
Association of Fryderyk Chopin with Warsaw**



Knowledge of Maria Skłodowska-Curie

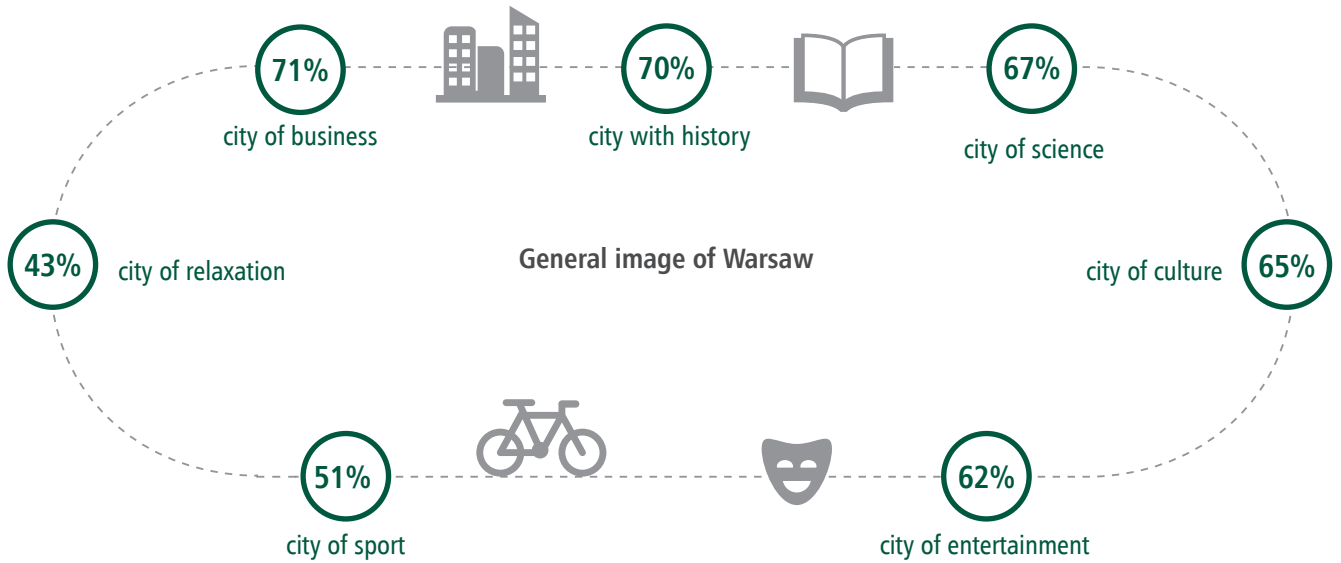
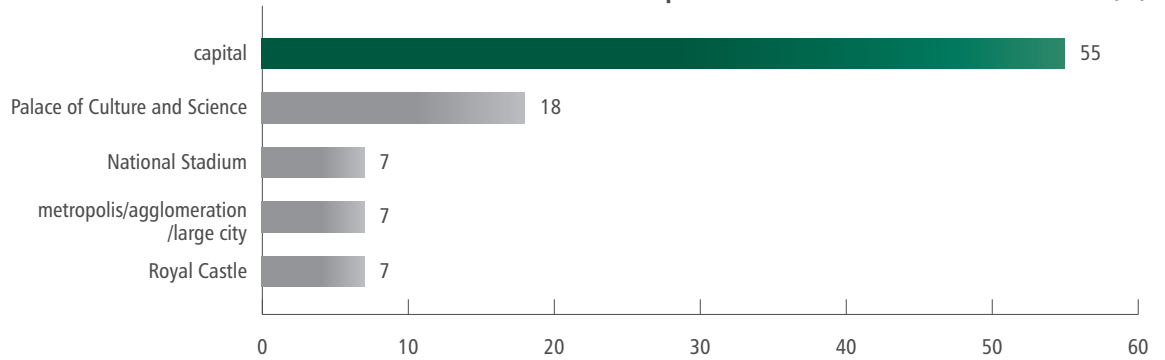


Association of Maria Skłodowska-Curie with Warsaw**

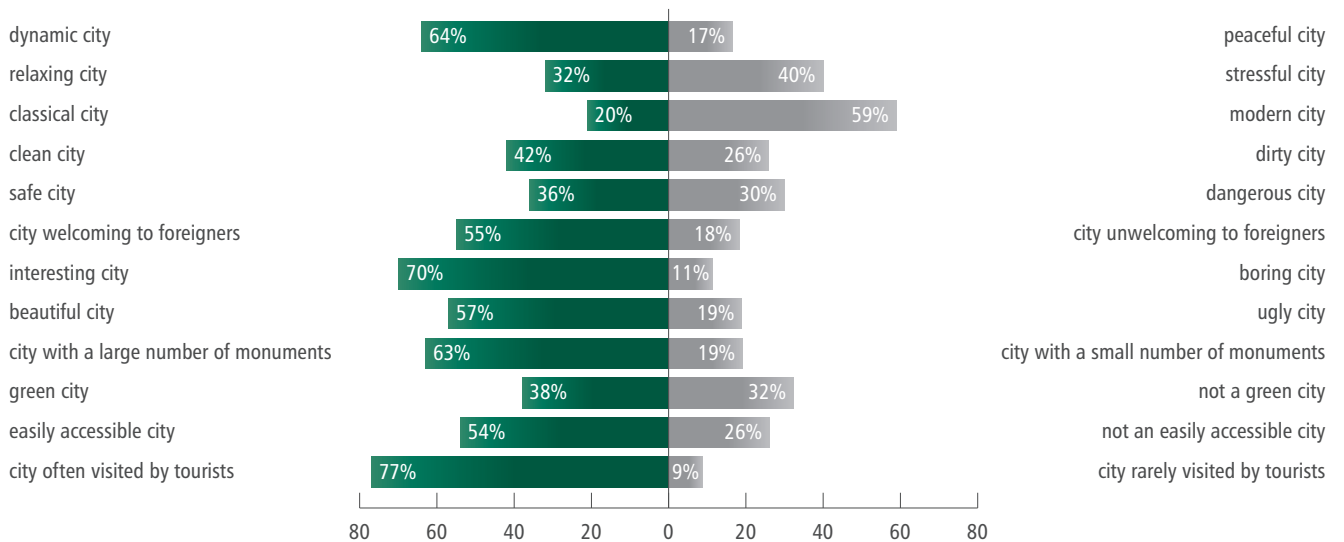


* among people who have at least heard of Warsaw
 ** among people who know these historical figures

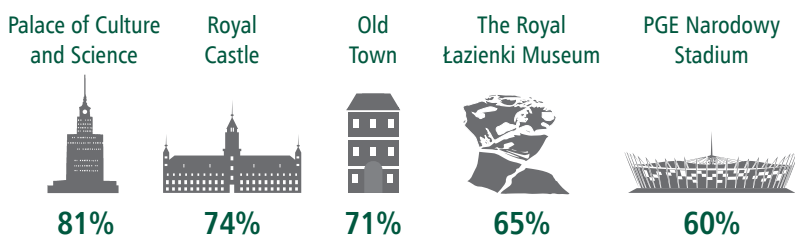
Selected spontaneous associations with Warsaw (%)



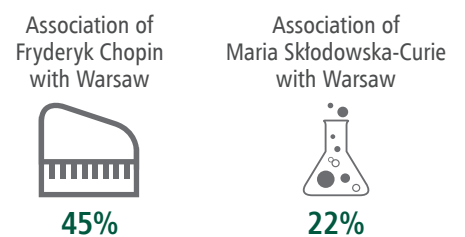
Warsaw characteristics



Most recognisable places and monuments associated with Warsaw



Recognisability of prominent people associated with Warsaw



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