

TOURISM IN WARSAW

REPORT 2017

2		Introduction
3		Key data
4		Warsaw – selected social and economic information
8	7	2. Accessibility
12		3. Tourist accommodation
16	in.	4. Tourist attractions
20	***	5. Year of the River Vistula
24		6. Tourist traffic characteristics
28		7. Meetings industry
32		8. Warsaw's image

Sources

36



Every single day of the week, Warsaw is a meeting place for its residents and tourists. It is a city that loves to share experiences and discover what is new, interesting and unique.

A reflection of these values is without a doubt Warsaw's River Vistula. A decade ago, the river was the city's undiscovered jewel, but is now experiencing a revival. Over the space of several years, it has become a buzzing hub where Varsovians and visitors to the city have found "their place", where they can enjoy activities, interact, play and relax together. It comes then as no surprise that the **Year of the River Vistula** in 2017 was a magnificent, rip-roaring birthday celebration for the Queen of Poland's rivers, and the honorary guests were all of us, residents and tourists.

It is striking the number of new meeting places that have appeared in our city over the past few years: from the growing beauty of Warsaw's parks and new boulevards on the Vistula, through restored market halls, which have changed into trendy eating spots, to modern coworking centres of creativity. Each of them witnesses thousands of meetings both great and small, between residents and tourists, entrepreneurs and investors. All of these get-togethers are changing our city and enhancing Warsaw.

This continued growth has meant that **we are rediscovering our city**. Practically every resident of Warsaw who strolls around the capital cannot help thinking how much the city has changed. We cannot help but notice Warsaw's new places, new ideas, and new ways of living. We are noticing ourselves anew in this changing Warsaw and are increasingly enchanted by our city.

We want to share this energy and wonder with tourists and partners of the capital. In this latest "Tourism in Warsaw" report, it is plain to see how this European metropolis is **developing**, **expanding and gaining its own unique ambience**. Not only is Warsaw giving birth to new places and venues, but there has also been a rediscovery of some previously underappreciated gems, like the Vistula.

Estimated number of arrivals of tourists and same-day visitors

9,680,000 Arrivals of tourists, total

16,070,000

Arrivals of same-day visitors, total

7,050,000 Arrivals of domestic tourists

2,630,000 Arrivals of foreign tourists

15,680,000 Arrivals of domestic same-day visitors

390,000 Arrivals of foreign same-day visitors

Arrivals of tourists and same-day visitors, total

25,750,000

Arrivals of foreign tourists by country of origin (top 10)







6.4% France

5.6% Ukraine

5.0%

4.7% Italy

4.1% Israel

3.0%

2.9% Netherlands

228,000

207,000

205,000

169,000

147,000

131,000

124,000

107,000

Japan 78,000

76,000

Means of transport used by tourists coming directly to Warsaw

domestic foreign



train

36% | 17%

520 tourist accommodation establishments

including 92 hotels

36% 8%

bus/coach

22% | 13%

airplane

6% | 63%

Tourist accommodation and its use

39,500

bed places

nearly 3.6 million

tourists have used tourist accommodation establishments nearly

accommodation establishments

6.2 million nights spent by tourists in tourist

Most popular main purposes of visit

domestic foreign



sightseeing

44% | 29%

14% | 21%

visiting relatives or friends

12% | 12%

business matters/

interests

6% 8%

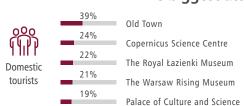
learning about the culture, history and local customs

5% | 15%

participation in a cultural event

4% 2%

The biggest attractions according to tourists (top 5)





Foreign tourists 61% 18% 14% 12% 10%

The Royal Łazienki Museum

Palace of Culture and Science

POLIN Museum of the History of Polish Jews

The Warsaw Rising Museum / Royal Castle

8.66

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



4.65 days

average length of stay in Warsaw



194 euro

average declared amount spent per person during stay in Warsaw





105 euro domestic tourists 404 euro foreign tourists 8.94

average tendency of wanting to return to Warsaw (on a scale of 1 to 10)



8.97

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

1. WARSAW – SELECTED SOCIAL AND ECONOMIC INFORMATION

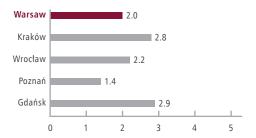


Basic data¹

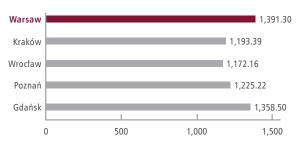


Warsaw economy compared to other selected cities in Poland

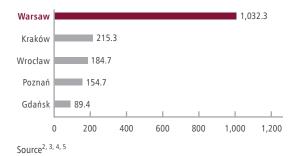
Registered unemployment rate at the end of December 2017 (%)



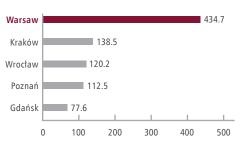
Average monthly gross wages and salaries in enterprise sector in January-December 2017 (euro)



Average paid employment in enterprise sector in January-December 2017 (thousands)



Number of entities of the national economy in the REGON register at the end of December 2017 (thousands)



Creditworthiness of Warsaw according to credit rating agencies^{6,7}







Warsaw in ranking tables

LaSalle E-REGI Index 2017. European Regional Economic Growth Index⁸

Ranking of European cities with the best economic prospects

26th place

[1st place] among cities in Central and Eastern Europe

fDi European Cities and Regions of the Future 2016/179

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 2017/18¹⁰

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

2017 The World's Most Competitive Cities¹¹

Ranking of the best locations in terms of competitiveness of particular branches of the economy

Region "Eastern Europe and Central Asia"

1st place

in the "business and financial services" category

1st place

in the "life sciences" category

2nd place

in the "energy" category

2nd place

in the "transportation and logistics" category

The Global Financial Centres Index 22¹²

Ranking of global financial centres

36th place

[1st place]

among cities in Eastern Europe and Central Asia

EMEA Investor Intentions Survey 2017¹³

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 2017

IESE Cities in Motion Index 2017^{14, 15}

Ranking of the smartest cities in the world

54th place

 $[\ 6^{th} \ place \]$ in the "urban planning" category

[3rd place] among cities of Eastern Europe

Sustainable Cities Mobility Index 2017¹⁶

Global ranking comparing cities in terms of sustainable mobility

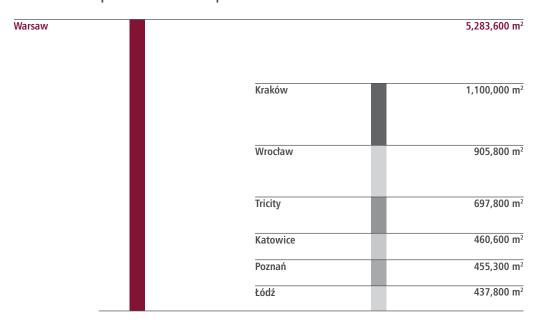
29th place

Office and retail space in Warsaw

5.28 million	275,400 m ²	824,700 m ²	23.50-23.75 euro/m²/month	13.0-16.5 euro/m²/month
modern office space at the end of 2017	office space handed over for use	total area rented	nominal rental value for the best office space in the city centre	nominal rental value for the best office space outside the city centre

Source¹⁷

Modern office space in Warsaw compared to other selected cities in Poland at the end of 2017^{17, 18}





Office space under construction at the end of 2017 amounted to 768,000 m^2 — work has begun on, among others, the construction of Varso, the tallest skyscraper in the European Union (310 m). Practically 80% of investments are located centrally.¹⁷



J.P. Morgan, one of the largest banks in the world, has chosen Warsaw as the location of its operational centre. The bank has signed a lease agreement for 15,600 m² in Atrium Garden. Approximately 3,000 people will work in the new headquarters from the middle of 2018.^{17, 19}



Handed over for use in 2016, **Warsaw Spire is the best office and business development in the world**. In the final of the prestigious MIPIM Awards 2017, Warsaw Spire beat office buildings in Rome, London and Shenzhen.²⁰

The Warsaw agglomeration: the largest and most competitive retail market in Poland²¹



over **1.5 million m²** of modern retail space at the end of 2017 (47 buildings)



over $81,000\ m^2$ of new retail space handed over for use in 2017, including Galeria Północna

Human capital in Warsaw



Warsaw came 3rd in the "women's skill & experience" category in the global Dell Women Entrepreneur Cities Index (WE Cities) which is a measure of a city's ability to attract and support high potential women entrepreneurs.²²



Warsaw was the only city in Poland to receive "very high" in terms of fluency in the EF English Proficiency Index
— a ranking showing the level of English skills.²³



The University of Warsaw has been Poland's number one university four times in a row according to the Perspektywy Higher Education Institutions League Table. The Warsaw University of Technology came 3rd. ²⁴



In the academic year 2016/2017, **63 higher education institutions** were functioning in Warsaw. There were **approx. 227,000 enrolled students** of which approx. 19,000 were foreigners making up 29% of all foreigners studying in Poland.²⁵

Quality of life in Warsaw



of residents have positive impressions associated with Warsaw as a place to live²⁶



of residents, given the choice, would prefer to live in Warsaw²⁶



of residents have a positive opinion of safety in the city²⁶

20th place of Warsaw

in the World's Safest Capital Cities league table²⁷



of residents have a positive opinion of greenery in the city²⁶

42% of the total area of Warsaw

is green space which comprises, among others, 88 parks, 242 squares and greens, 12 nature reserves and 7 Natura 2000 areas²⁸



of residents have a positive opinion of cleanliness and tidiness in the city²⁶

1st place of Warsaw

in the league table of largest, most well-tended cities in Poland²⁹



of Warsaw residents have a positive opinion of the public transport in the city²⁶

over 1 billion passengers annually

- public transport (buses, trains, metro and trams) is Varsovians' preferred method of transport $^{\rm 30}$



of residents believe that Warsaw is a bicycle-friendly city²⁶

over 530 km-long cycle network and over 5,000 public bikes

- this includes 100 electric bikes, 60 child bikes and 45 tandem bikes³¹



of Warsaw entrepreneurs have a positive opinion of conditions for launching a business in Warsaw³²

1st place of Warsaw

in the Local Government League Table covering Polish cities and councils with the most dynamically developing entrepreneurships³³

2. ACCESSIBILITY

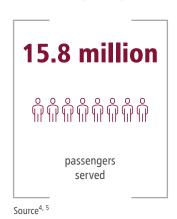


Air

Approximate direct flight times to Warsaw from selected cities



Warsaw Chopin Airport









London

Paris

Wrocław

Gdańsk

Frankfurt





Distance from the centre of Warsaw⁶

approx. 10 km

Approximate travel time from airport to Warsaw centre⁷

car/taxi



Rapid Urban Railway



bus





In the summer season, **35** carriers offered 99 regular routes to Europe, 8 to Asia, 5 to North America, 4 to Africa and 3 to the Middle East from Warsaw Chopin Airport.⁸



Warsaw Chopin Airport saw the largest increase among airports in the European Union serving between 10 and 25 million passengers in 2017. Warsaw's airport has seen an increase of 64% in passengers served in the last 5 years. 9, 10



Polish Airlines LOT has opened up **direct flights from Warsaw to Los Angeles**. One of the "passengers" was a restored, Polish-manufactured Fiat 126p; known for its cult-status, the "Polski Fiat" was sent as a gift to a well-known Hollywood superstar as part of the "Bielsko-Biała for Tom Hanks" initiative. 11, 12



Warsaw Chopin Airport was the first in Poland to offer its passengers free drinking water. Three **drinking fountains** appeared in the airport transit zone.¹³

Warsaw Modlin Airport

2.9 million



passengers served over **17,900**



flight operations performed

48



destinations

7%

of Polish air market share

Source^{5, 14}

Distance from the centre of Warsaw¹⁵



Approximate travel time from airport to Warsaw centre^{7, 16}



car/taxi/bus



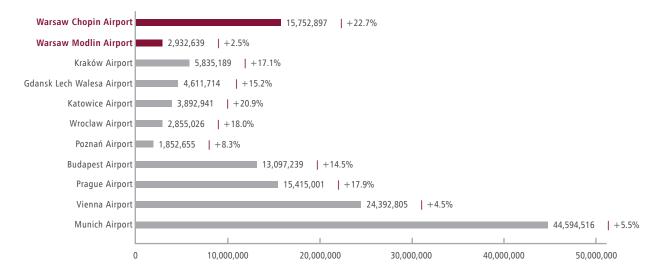
Warsaw Modlin Airport celebrated its 5th birthday and served its 10 millionth passenger who flew from Cagliari to Warsaw.^{17, 18}



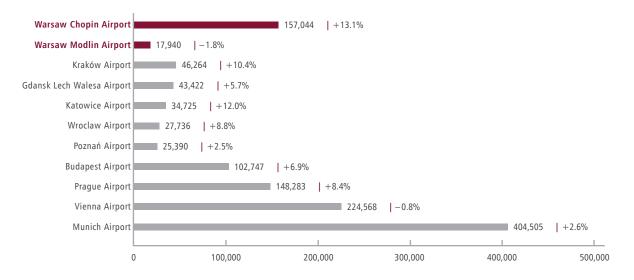
Ryanair opened up 5 new routes in winter 2017/2018, including Eilat, Seville and Venice.¹⁹

Warsaw Chopin Airport and Warsaw Modlin Airport in comparison to other selected airports²⁰

Passengers served – number and percentage changes in comparison to 2016

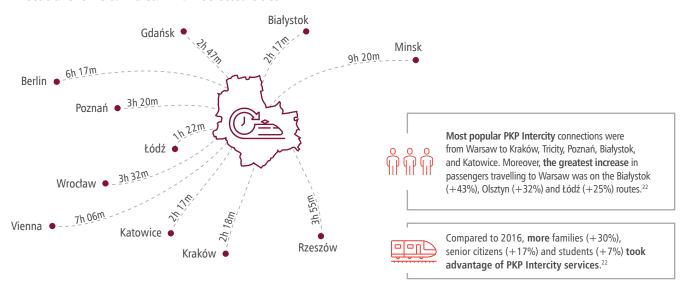


Flight operations performed - number and percentage changes in comparison to 2016



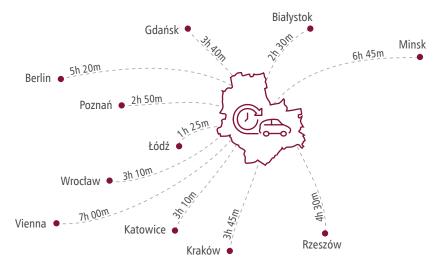
Rail

Direct travel time to Warsaw from selected cities²¹



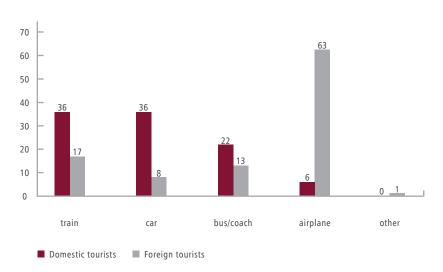
Road⁷

Approximate travel time to Warsaw from selected cities

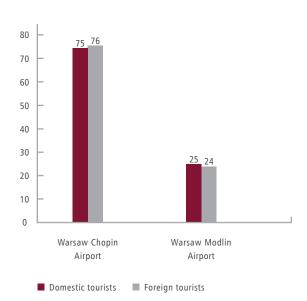


Means of transport used by tourists coming to Warsaw²³

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



Airports of arrival to Warsaw (%)



3. TOURIST ACCOMMODATION



Accommodation establishments*

*based on data of the Warsaw Tourist Office, City of Warsaw and Ministry of Sport and Tourism; due to database verification, data cannot be compared with previous years

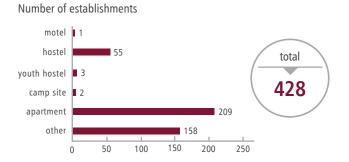


*including 100 tent and 80 caravan pitches

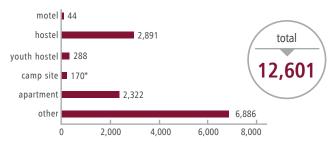
Source¹



Other tourist accommodation establishments¹



Number of bed places



*including 100 tent and 80 caravan pitches

Use of tourist accommodation establishments*

*data from establishments with over 10 bed places including imputation for establishments that declined to take part in the research

Number of users, nights spent and rented rooms²



3,559,300

tourists have used accommodation establishments*

7.4% in comparison to 2016

1,339,800

foreign tourists have used accommodation establishments*

4.0% in comparison to 2016

38%

of all tourists making use of accommodation establishments



6,160,200

nights spent by tourists in accommodation establishments*

8.9% in comparison to 2016

2,553,200

nights spent by foreign tourists in accommodation establishments*

6.9% in comparison to 2016

41% of all nig

of all nights spent by tourists in Warsaw



3,539,500

rooms rented by tourists in hotels*

72.4%

occupancy in hotel establishments

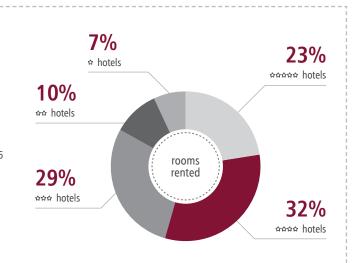
3.1 pp in comparison to 2016

highest occupancy in September

lowest occupancy in January

83%

57%



Foreign tourists making use of accommodation establishments – top 10 by country of residence²



1. United Kingdom
2. Germany
3. USA
4. Israel

5. Spain

- 10.2% 8.6% 8.6% 7.2%
- 6. France 5.0%

 7. Ukraine 4.5%

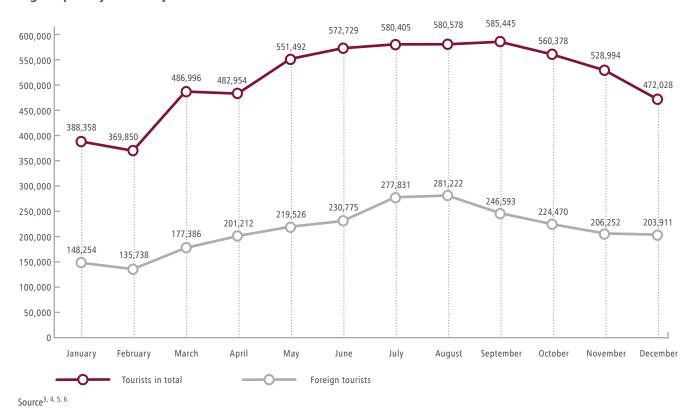
 8. Italy

 9. Russia 3.6%

 10. China (not including Taiwan)

^{*}figures have been rounded to nearest thousand

Nights spent by tourists by months









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

*data across 12 months (07.2016-06.2017)



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

*data across 12 months (07.2016-06.2017)



Relation of chained hotels to non-chained hotels in Warsaw is half-half, in terms of rooms it is three to four¹⁰

Source⁹



93%

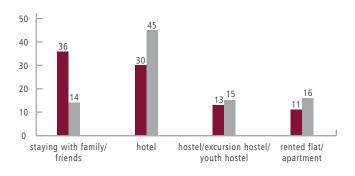
of tourists visiting Warsaw spend the night within the city boundaries¹¹



of tourists have a positive opinion of tourist accommodation*

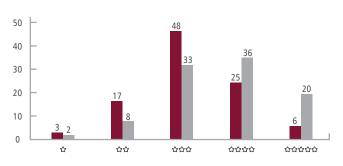
*people who have used this type of service Source¹¹

Main types of accommodation used by tourists (%)11



■ Domestic tourists ■ Foreign tourists

Standard of hotels used by tourists (%)11



■ Domestic tourists ■ Foreign tourists

World Travel Awards¹²



Awards are granted on the basis of votes by consumers and managers in the tourist industry

Poland's Leading Hotel 2017 – InterContinental Warszawa

Poland's Leading Business Hotel 2017 – Hilton Warsaw Hotel & Convention Centre

Poland's Leading Conference Hotel 2017 – Hilton Warsaw Hotel & Convention Centre

Poland's Leading Hotel Suite 2017 – Presidential Suite in the Hilton Warsaw & Convention Centre



2017 Travellers' Choice according to Tripadvisor¹³

in the "Luxury Hotels - Poland" category – 8 of the 25 best Polish luxury hotels are located in Warsaw (of which 4 out of the top 5)



HolidayCheck Award 2017¹⁴

2 out of 7 of the best Polish accommodation establishments are Warsaw hotels



Golden "Loved by Guests 2017" list of Hotels.com¹⁵

9 Warsaw hotels among the 2,500 best hotels in the world

4. TOURIST ATTRACTIONS



Tourist attractions – turnout* and selected events

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



With the title of "Leader of Accessibility", the museum promotes solutions for senior citizens and people with disabilities. The prize was awarded for historic sites without barriers — the Old Orangery with the Royal Theatre and foundry.

Visitors touring the Royal Łazienki Museum may also come across such attractions as the Chinese Avenue and Chinese Garden illuminations, the Chinese art trail, and oriental concerts organised as part of the sixth Festival of Light.

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



The Gallery of Polish Design was opened, presenting the achievements of Polish designers from the beginning of the 20th century to modern times. Visitors can see serial products, as well as designs and prototypes that were never put into mass production.

Over 400 exhibits, including furniture, porcelain, jewellery and knick-knacks, were on show as part of the "Biedermeier" temporary exhibition. This is the first such extensive exhibition in Poland presenting the lifestyle of middle European burghers of the 19th century.

The Warsaw Rising Museum^{16, 17, 18, 19}



In cooperation with the Warsaw Film School, for the 73rd anniversary of the Warsaw Uprising, the Museum prepared two commemorative spots: "The Hospital" and "The Tenement". Their aim is to encourage people to show respect for the heroes of the Uprising and remember their heroism.

For the third time, the Museum organised the outdoor "Remember Them" exhibition, commemorating the civilian victims of the Warsaw Uprising. The exhibition consisted of 96 white blocks with the names of nearly 60,000 Varsovians inscribed on them.

*approximate data, or data rounded to nearest thousand

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



The regular outdoor "Royal Garden of Light" exhibition, which sees the palace gardens lit up with thousands of colourful LEDs, received a distinction from the Polish Tourism Organisation as part of the Best Tourism Product in Poland contest.

The Museum opened two Cabinets of Antiquities with works of art collected by outstanding archaeologist and collector Stanisław Kostka Potocki. The exhibition includes, among others, Osiris' head, a fragment of an Egyptian sculpture.

The Royal Castle in Warsaw – Museum^{13, 14, 15}



The Museum has begun the reconstruction of the Lower Garden based on a pre-war architectural design that combines modernity with the spirit of the Baroque. This investment will bring the Castle, located on the Vistula embankment, closer to the river.

Over 150 products from the oldest Polish porcelain factories were admired at the temporary exhibition: "Polish white gold. Porcelain from Korzec and Baranówka from the collection of Andrzej Wasilewski".

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



The Museum received the Europa Nostra award for the "Jewish Cultural Heritage: Educational programme". This is the highest distinction for protecting cultural heritage in Europe.

Almost 45,000 people visited the "Blood: Uniting and Dividing" temporary exhibition, addressing blood in the context of Jewish culture. Among others, while visiting the exhibition, visitors could admire the work of Anish Kapoor, now considered to be one of the most outstanding artists in the world.

The Fryderyk Chopin Museum in Warsaw^{23, 24, 25, 26}



Two new valuable manuscripts have been added to the Museum's collection: a piece of Ballade in G minor, Op. 23 and the manuscript of the hymn "Spring" Op. 74, No. 2, written for the painter Teofil Kwiatkowski, who painted several portraits of the composer.

The "Chopin's Opera – Fryderyk at the National Theatre" temporary exhibition opened and was dedicated to the composer's unique passion for the opera. The exhibition was accompanied by numerous educational activities, both for children and adults.

Centre for Contemporary Art Ujazdowski Castle^{31, 32, 33}



The opening of the "Late Polishness. Forms of national identity after 1989" temporary exhibition comprising over 100 works and art projects by several dozen contemporary creators of visual arts, cinema and theatre.

The works of 33 artists from around the world were presented at the "Dizziness." Navigating the Unknown" temporary exhibition looking for alternative states of consciousness and engaging the audience to confront their own beliefs.

Copernicus Science Centre^{37, 38, 39, 40, 41}



The animated film "Hello Earth", created in fulldome technology by the Copernicus Science Center planetarium, won the main prizes at the planetary film festival in Brno and at the Espinho festival in Portugal.

The opening of the "Air – Is Not Just Nothing" temporary exhibition presented 45 interactive exhibits that helped visitors discover and appreciate the properties of air, without which there would be no life on Earth.

Palace of Culture and Science in Warsaw^{47, 48, 49}



The jubilee 25th International Tourism Fair TT Warsaw at the Palace of Culture and Science. One of the most important tourist events in Central and Eastern Europe attracted exhibitors from over 50 countries.

More than 120 works were presented at the "Dali versus Warhol – art, music, film" temporary exhibition, the theme of which was money, fame and splendour. It was the world premiere of an exhibition dedicated to the pop art icon and world's most famous surrealist.

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

Polish Army Museum^{27, 28, 29, 30}



The "Józef Piłsudski. 150th Birthday" temporary exhibition opened; it presented memorabilia of the Marshall of Poland, such as a sabre carried by Piłsudski when he served as Commander of the First Brigade of the Polish Legions and the design of his sarcophagus lid which was never realised.

A newly purchased collection of Polish militaria, consisting of over 1,800 exhibits, was presented; this included Piłsudski's Maciejówka-style hat, several hundred uniforms and over 400 military badges.

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



Poland has welcomed its first retrospective exhibition of the works by Maria Lassnig, one of the most original painters of the 20th century. Visitors could admire several dozen large-format images that reflect the artist's fascination with the human body and the art of self-portraiture.

80 works by recognised American photographer Gordon Parks were presented at the exhibition titled "Gordon Parks: I Use My Camera as a Weapon" introducing, among others, the history of the twentieth century and showing the determination with which the author fought for social equality.

PGE Narodowy Stadium^{42, 43, 44, 45, 46}



More than 60,000 spectators appeared in the stands of the PGE Narodowy Stadium to participate in the opening ceremony and the first match of the 30th Men's European Volleyball Championship – LOTTO EUROVOLLEY POLAND 2017. The match saw Poland take on Serbia.

PGE Narodowy Stadium hosted the concerts of world-famous bands Depeche Mode and Coldplay who were both paying their second visit to the venue.

City Zoological Garden in Warsaw^{50, 51, 52, 53}

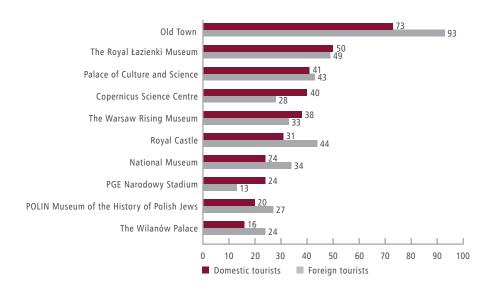


After a few years' break, snow leopards have returned to Warsaw Zoo. The opening of one of the most modern catwalks in Europe for this predatory cat is part of the zoo's mission to protect endangered animal species.

The Polish premiere of the film "The Zookeeper's Wife" tells the story of the Garden's director, Jan Żabiński (Johan Heldenbergh) and his wife Antonina (Jessica Chastain), who saved several hundreds of Jews during the Second World War, hiding them in Warsaw Zoo.

Tourist attractions in the eyes of tourists and experts

Main sights and attractions visited by tourists in Warsaw (%)54





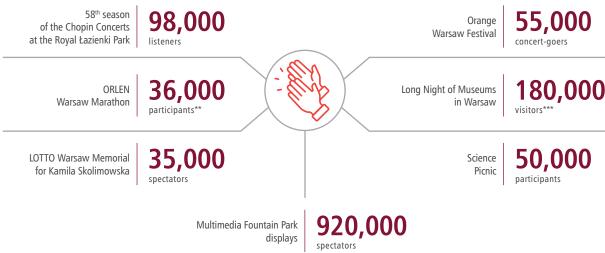
The headquarters of the Museum of Warsaw is open to visitors again. The renovation of the Museum lasted several years and included the modernisation and digitisation of 11 historic tenement houses and the realisation of a new exhibition, "The Things of Warsaw".55

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



^{*}total percentage data is over 100% as respondents could indicate more than one place Source⁵⁴

Selected events – attendances*



^{*}approximate data, or data rounded to nearest thousand

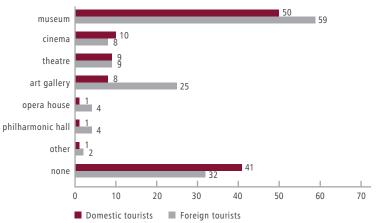
^{****}data from approx. 85% of all institutions that took part in the event Source^{37, 56, 57, 58, 59, 60}



1 1 % of tourists took part in an event such as a concert, festival, fair or sports event during their stay in Warsaw⁵⁴

^{**}participants of the marathon together with accompanying events

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



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

Source⁵⁴

The certificate of the Polish Tourism Organisation in the competition for **Best Tourism Product in Poland** was awarded to:⁶¹

• Copernicus Science Centre in Warsaw

Certificates for Best Tourism Products of the Mazovian Voivodship 2017 were awarded to:⁶²

- Copernicus Science Centre
- Royal Garden of Light at the Museum of King Jan III's Palace at Wilanów
- · Winter National project at PGE Narodowy Stadium

Selected cultural institutions - attendances*



Warsaw Philharmonic 117,000 listeners

National Theatre in Warsaw **88,000** spectators

Roma Musical Theatre 219,000 spectators

^{*}approximate data, or data rounded to nearest thousand Source^{63, 64, 65, 66}



Warsaw's Praga district took 4th place in the "coolest neighbourhoods in Europe" ranking, compiled by Business Insider. It overtook districts in Rome, Paris and Barcelona. Voters appreciated, among others, Praga's alternative theatres, clubs as well as art galleries.⁶⁷



Warsaw's Praga district and Zbawiciela Square are, according to the Skyscanner travel website, some of the most hipster places in the world.68



Warsaw was listed as being part of an international group of cities with **the most attractive nightlife**. Poland's capital city was ranked 9th in the Hostelworld booking platform league table beating such metropolitan heavyweights as New York, London and Paris.⁶⁹



1st place of Warsaw among Polish counties and cities with county rights in terms of the value of the following indicators:⁷⁰

- tourist attractiveness index, ahead of Kraków, Nowy Sącz county and Tatra county
- cultural attractiveness index, ahead of Kraków, Wrodaw and Gdańsk



of tourists have a positive opinion of the cultural attractions on offer*



of tourists have a positive opinion of the recreational and sporting facilities on offer*



of tourists have a positive opinion of the gastronomy infrastructure*



of tourists have a positive opinion of the entertainment attractions on offer (club, disco, pub)*



of tourists have a positive opinion of the shops and shopping centres on offer*



of tourists have a positive opinion of the customer service in tourist information points*

^{*}people who have used this type of service Source⁵⁴

5. YEAR OF THE RIVER VISTULA



The 550th anniversary of the first rafting down the Vistula was the inspiration behind making 2017 the Year of the River Vistula.¹

During the celebrations, with support from the City of Warsaw, over **60 projects** were undertaken whose value exceeded **240,000 euro**. Many **sporting**, **cultural and educational activities** took place by the Vistula, including:^{2,3}





river cruises and canoeing



outdoor workshops (for example, boat-building, nature, education and artistic workshops)



outdoor film screenings



theatre



nature walks



running and bikin competitions



vakeboarding lessons



activities and game for young ones

The aim of these events was to:2

- encourage residents and tourists to spend time by the Vistula
- promote good practices by the river
- raise ecological awareness and build a feeling of responsibility for maintaining the cleanliness of public spaces
- teach river safety rules

Two cyclical regular big events took place during the Year of the River Vistula:

Garlands on the Vistula^{4, 5}

An event inspired by the Slavic tradition of celebrating Kupała Night, the shortest night of the year.

During Garlands, Varsovians and tourists can spend the day in a creative and relaxing way in a midsummer town and then during the evening watch a pop concert and firework display.



Vistula Festival⁶

An outdoor event promoting activities on the Vistula.

The 10th anniversary celebrations took place as part of the **Year of the River Vistula**. Activities and attractions included:

- trips down the Vistula in wooden boats, catamarans and motorboats
- The Grand Mermaid Parade and Miss Mermaid contest
- Omega class regatta
- Stand Up Battle of Warsaw Warsaw's first ever stand up paddleboarding championship on the Vistula

The climax of the Vistula Festival was a **parade of several dozen illuminated boats**, which could be admired from, among others, the Vistula Boulevards.

Warsaw's Vistula River is becoming an increasingly popular location every year, with the river and its banks being informally known as the "19th city district".⁷

The Vistula District includes, among others:

28 km-long

segment of the river, part of the Natura 2000 network

8

natural city beaches

6 km

of walkways along the Vistula Boulevards, including 1.8 km of a modernised river promenade

34 km

of the Vistula River Bicycle Trail

approx. 70

mooring places at Czerniakowski Port

Source⁸

Varsovians have fallen in love with the Vistula!

82%

of residents have been to the Vistula during the past 6 months* (92% of people aged 25-40)

93%

of residents have a positive opinion of the changes that have taken place on the Vistula over the past 10 years

62%

of residents aged 18-40 have been to Poniatówka beach in the past year*

71%

of residents have a positive opinion of the equipment available on the city beaches

92%

of residents have a positive opinion of the modernisation of the Vistula Boulevards

*research conducted between 16-21 November 2017 Source⁹





What's new on the Vistula?



The Well-wisher Traveller Dwarf became an honorary resident of the Vistula District. Well-wisher comes from Wrocław, famous for its numerous figurines of dwarves strewn around the city. He travelled all the way up to Warsaw to celebrate the Year of the River Vistula with the people of Warsaw, and you can see him on the Vistula Boulevards around the Old Town.¹⁰



A neon sign of the Vistula District appeared on Świętokrzyski Bridge. Its design is that of a paper boat and was made using traditional artisan techniques.¹¹

105,000!

That many people visited the **Museum on the Vistula**, a branch of the Museum of Modern Art on the Vistula Boulevards. It is a unique example of a cultural and educational space on the river. 12, 13

1,200 m!

This is the length of the newest section of the **Vistula Boulevards** opened this year. This modernised promenade includes two amphitheatres, a fountain, trampolines, a beach with wicker baskets as well as food and exhibition pavilions. Boats can moor on the embankments, and the stairs leading down to the water are an excellent place for relaxing. What is more, the Boulevards are now bursting with greenery.^{14, 15}





The Vistula District has become enhanced thanks to the Vistula Information System. Dedicated posts, signs, maps, public water transport stops as well as information boards for water lovers have made it easier for residents and tourists to move along the banks of the Vistula and make use of the attractions the river has to offer. 16, 17

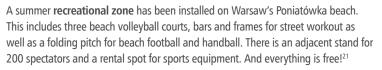
The Vistula on Google Street View

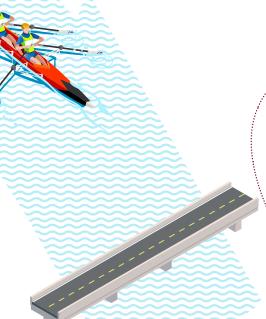
The Vistula is the first river in Europe along which you can take a virtual cruise and see Warsaw's monuments and nature reserves from the perspective of a fishing boat. 18, 19





There is now a **climbing wall** beside Świętokrzyski Bridge tailored to both children, beginner climbers as well as professionals. The project was a local initiative and funded as part of the Warsaw participatory budget.²⁰





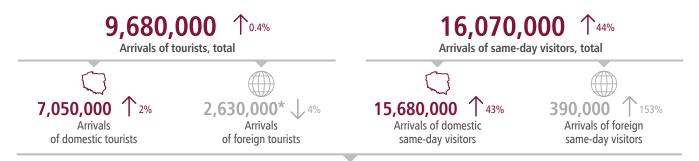


6. TOURIST TRAFFIC CHARACTERISTICS



Estimated size of tourist traffic1

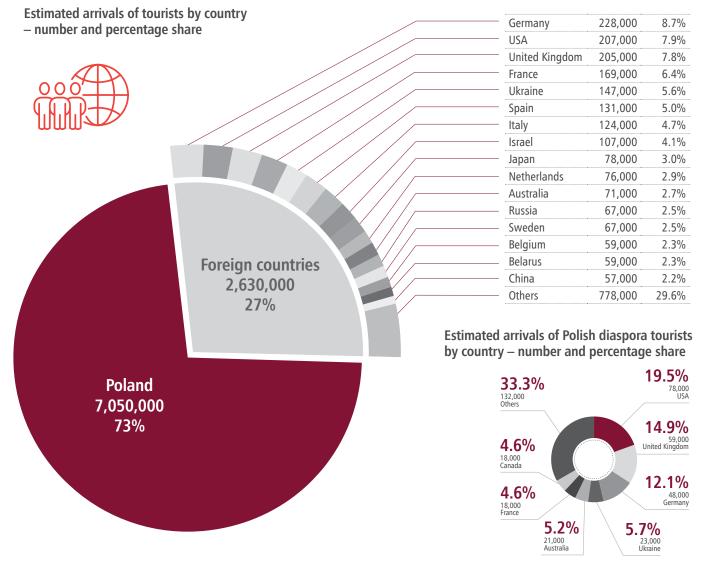
Estimated arrivals of tourists and same-day visitors – number and percentage changes in comparison to 2016



Arrivals of tourists and same-day visitors, total

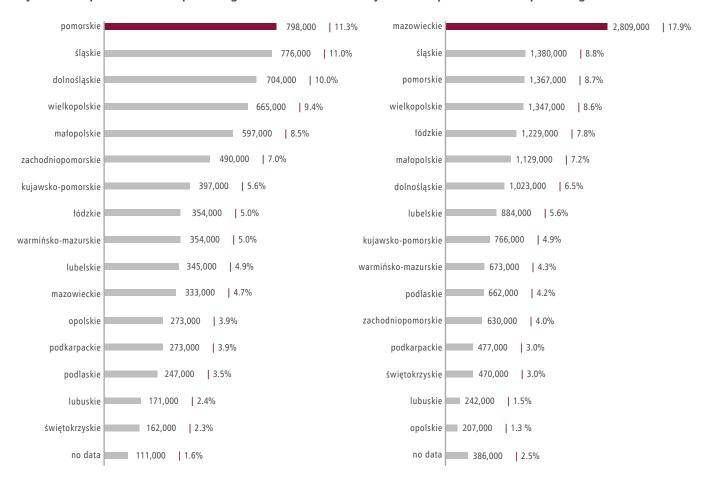
25,750,000

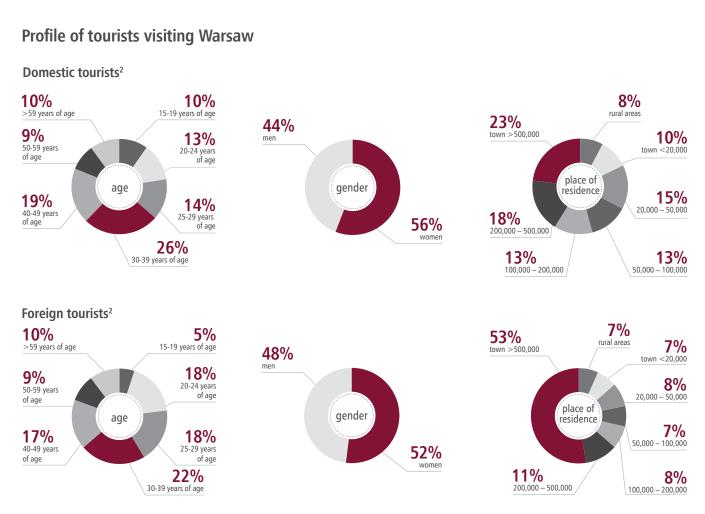
*increase of 4% in arrivals of tourists making use of tourist accommodation establishments that submitted reports to the Central Statistical Office [GUS]; decrease only in terms of arrivals of tourists making use of other forms of accommodation, mainly staying with family/friends



Estimated arrivals of domestic tourists by voivodship – number and percentage share

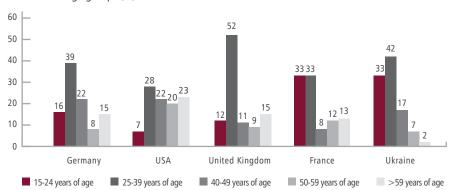
Estimated arrivals of domestic same-day visitors by voivodship — number and percentage share



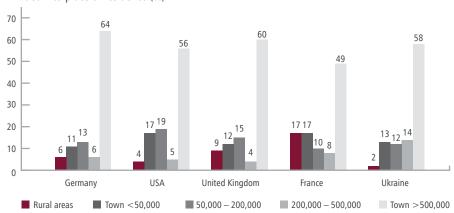


Foreign tourists - main countries³

Divided into age groups (%)

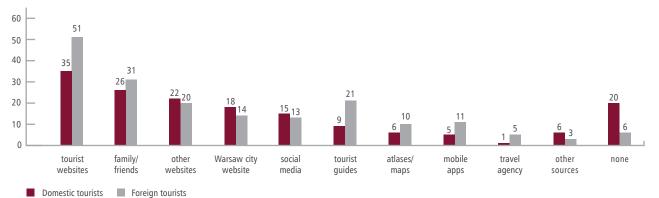


Divided into place of residence (%)



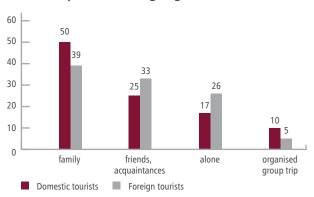
Profile of a tourist's stay in Warsaw

Sources of information about Warsaw (%)*



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

Travel companions while going to Warsaw (%)*

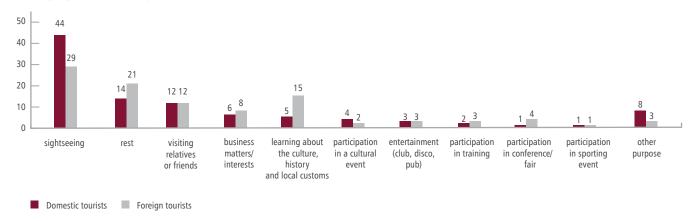


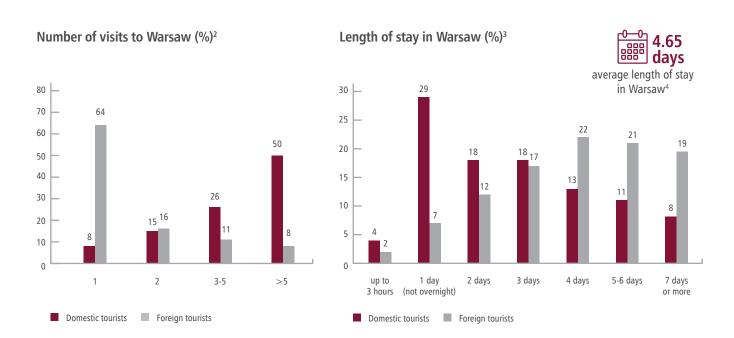
*total percentage data is over 100% as respondents could indicate more than one answer Source²





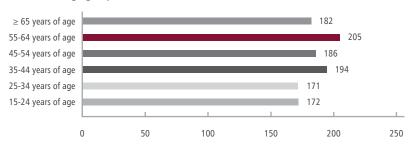
Main purpose of visiting Warsaw (%)²

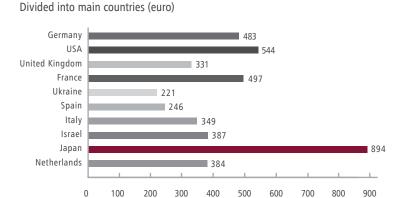




Average declared amount spent per person during stay in Warsaw⁴

Divided into age groups (euro)







7. MEETINGS INDUSTRY





Warsaw is **the largest and most important destination** for 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) – almost 17,000* took place in 2017.



From among over **200 key MICE venues** in the capital, there are numerous conference centres and hotels with conference capabilities as well as venues like 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 domestic and international air traffic**, and has the best hotel conference infrastructure.

*data collected from the Demand Outlook system maintained by Z-Factor as well as 3 fair and conference venues, and 1 venue/hall for special events
Source¹



1st place of Warsaw among Polish counties and cities with county status in terms of the value of the business-hotel attractiveness index, ahead of Kraków and Gdańsk²

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



Warsaw is ahead of cities such as Beijing, New York and Moscow

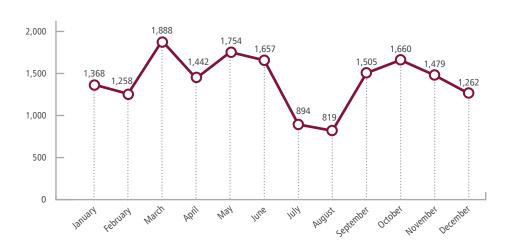
^{*}meetings which take place on a regular basis, involve more than 50 participants and migrate between at least three countries

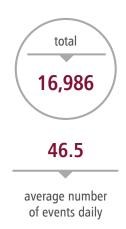
Warsaw conference market – size and characteristics¹

The diagrams presented below are based on data from the Demand Outlook system maintained by Z-Factor as well as additional information collected from 3 fair and conference venues, and 1 venue/hall for special events.

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.

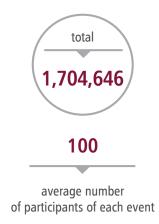
Number of events by month



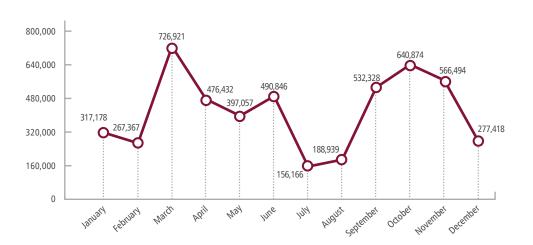


Number of participants of events by month



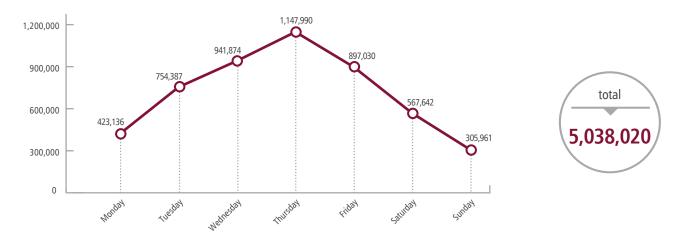


Space used by month (m²)

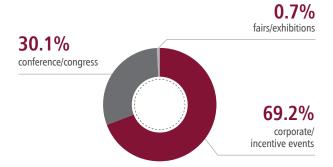




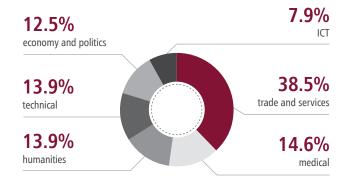
Space used by day of the week (m2)



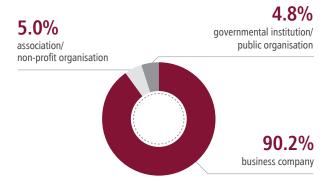
Events by type



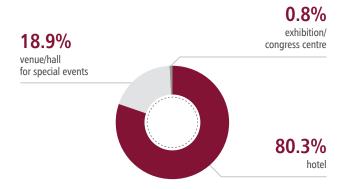
Events by subject group



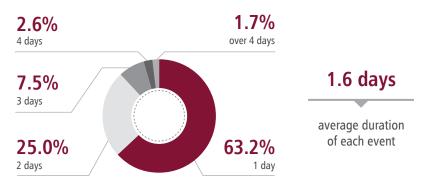
Events by type of organiser



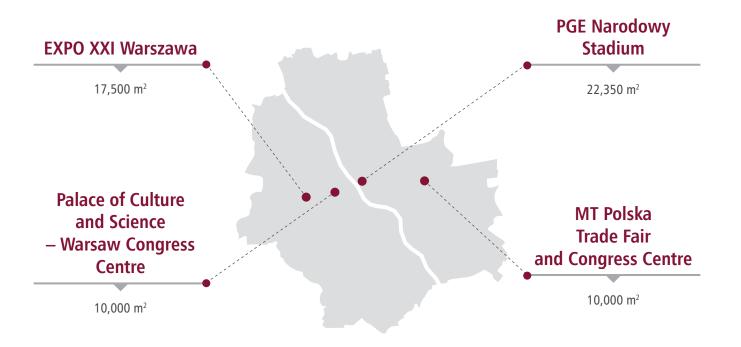
Events by venue type



Events by duration



Exhibition space of selected venues in 2017⁵



Tourist traffic characteristics – business tourists⁶

Means of transport used in travelling directly to Warsaw		
train 33%	airplane 32%	
car 22%	bus/coach	

Main types of accommodation in Warsaw		
hotel	50 %	
staying with family/friends	16%	
rented flat/apartment	16%	
hostel/excursion hostel/ youth hostel	10%	

Visits to Warsaw	
first	20%
second	13%
visited 3-5 times	19%
visited more than 5 times	48%





Amount spent during stay in Warsaw



316 euro

average declared amount spent per person



Warsaw according to tourists1



Amongst the significantly positive aspects of their stay, tourists most often list:

friendly people



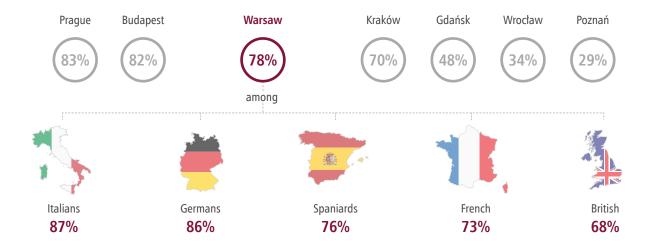
interesting places and monuments



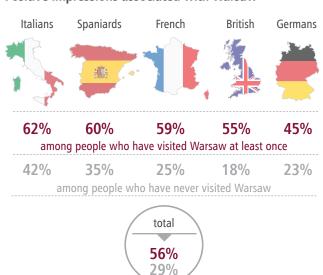
Warsaw's image among residents of selected European countries*

*France, Spain, Germany, United Kingdom, Italy Source²

Knowledge of Warsaw compared with selected European cities

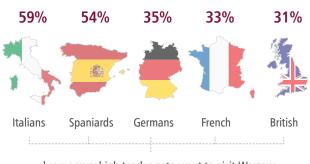


Positive impressions associated with Warsaw*



^{*}among people who have at least heard of Warsaw

Tendency to want to visit Warsaw*



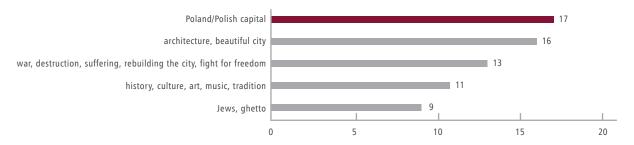
have a very high tendency to want to visit Warsaw



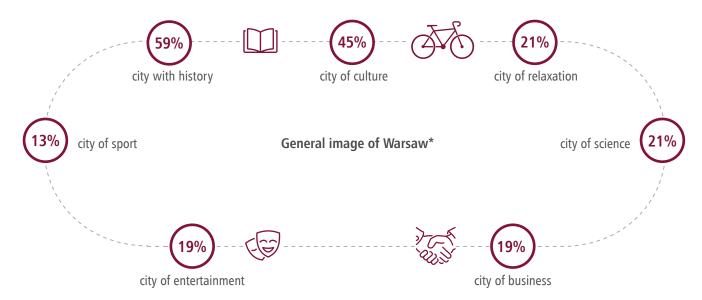
^{*}among people who have at least heard of Warsaw

^{*}on a scale of 1 to 10

Selected first associations with Warsaw (%)*

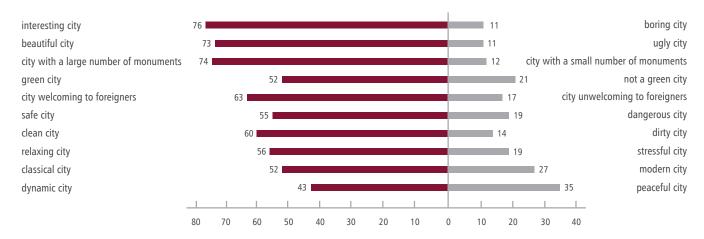


^{*}among people who have at least heard of Warsaw



^{*}among people who have at least heard of Warsaw

Warsaw characteristics (%)*



^{*}according to people who have at least heard of Warsaw

Most recognisable places and monuments associated with Warsaw (%)*



^{*}among people who have at least heard of Warsaw

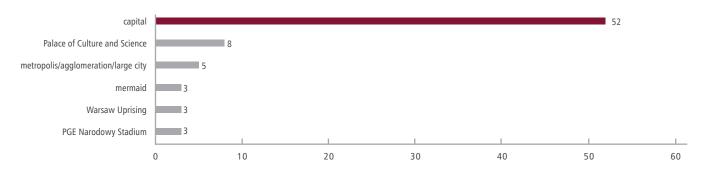


 $\textbf{75\%} \quad \text{of residents* of selected European countries know of Fryderyk Chopin,}$

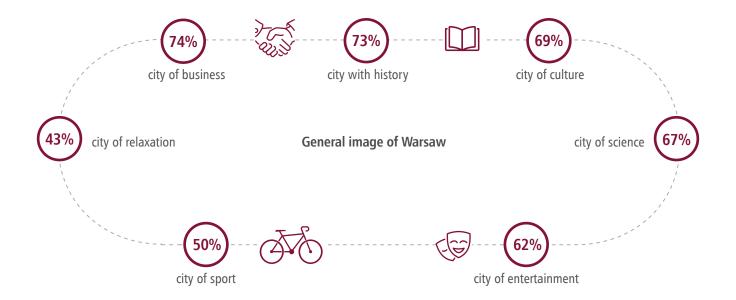
 $\textbf{43\%} \quad \text{of them associate him with Warsaw (nearly 2/3 of Italians, but only 1/3 of British and Germans)}$

Warsaw's image among Polish people³

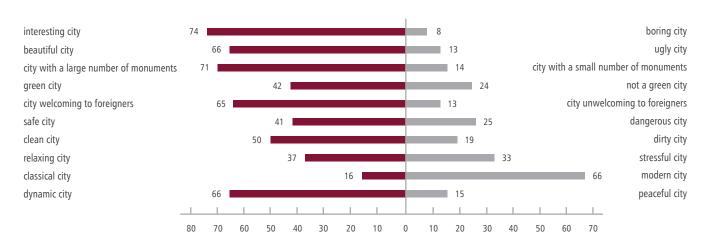
Selected first associations with Warsaw (%)



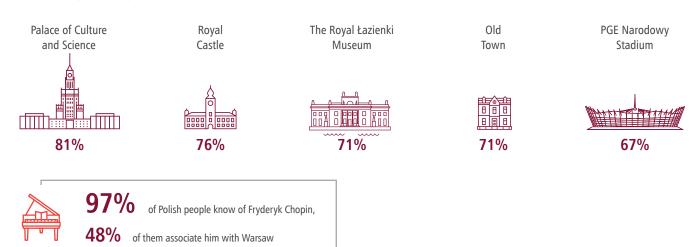
^{*}among people who have at least heard of Warsaw



Warsaw characteristics (%)



Most recognisable places and monuments associated with Warsaw (%)





36th place of Warsaw in the global Anholt-GfK City Brands IndexSM ranking, which assesses the strength and attractiveness of the images of cities⁴

Sources

Chapter 1:

- https://bdl.stat.gov.pl PRZEGLAD STATYSTYCZNY WARSZAWY. ROK XXVI. NR 4. Kwartalnik, URZAD STATYSTYCZNY W WARSZAWIE, 2018
- BIULETYN STATYSTYCZNY MIASTA KRAKOWA. Rok XIX. IV KWARTAŁ,
- Urząd Statystyczny w Krakowie WROCŁAW. SYTUACIA SPOŁECZNO-GOSPODARCZA. 2017 I-IV KWARTAŁ, URZĄD STATYSTYCZNY WE WROCŁAWIU
- POZNAŃ. BIULETYN STATYSTYCZNY. Rok XXVI. Nr 4. IV kwartał 2017,
- Urząd Statystyczny w Poznaniu https://www.fitchratings.com/site/pr/1034620
- https://www.thchraitngs.com/stre/pr/1034620
 https://www.tmcwarszawa.plaktualnosci/warszawa-stabilna-finansowo-potwierdzaj-dwie-mi-dzynarodowe-agencje
 LaSalle I-REGI Index 2017. EUROPEAN REGIONAL ECONOMIC GROWTH INDEX, LaSalle Investment Management, 2017
 fDI EUROPEAN CITIES AND REGIONS OF THE FUTURE 2016/17. RANKINGS, fDI Intelligence, The Financial Times, 2016
 fDI POLISH CITIES OF THE FUTURE 2017/18, fDI Intelligence, The Financial Times, 2017
 2017 THE WORD'S MOST COMPETITIVE CITIES, Conway, 2017
 21 The Clabb Lispacial Centers Ledov 22. Financial Contro Europe. 2017

- The Global Financial Centres Index 22, Financial Centre Futures, 2017
 Bereich Index 22, Financial Centre Futures, 2017
 Bereich Index 2017, IESE Business School University of
- 18 https://businessinsider.com.pl/wiadomosci/inteligentne-miasta-w-polsce-raport-iese-cities-in-motion-index-2017/pvqw3h4 16. SUSTAINABLE CITIES MOBILITY INDEX 2017, Arcadis
- 17. MARKETBEAT. RYNEK BIUROWY W WARSZAWIE. PODSUMOWANIE 2017 ROKU, Cushman & Wakefield, 2018

 18. MARKETBEAT. RYNEK BIUROWY REGIONY. PODSUMOWANIE 2017
- ROKU, Cushman & Wakefield, 2018
- 19. https://www.bankier.pl/wiadomosc/JP-Morgan-otwiera-siedzibe-w-Polsce-4011965.html
- http://warszawa.wyborcza.pl/warszawa/7,54420,21508933,warsaw-spire-z-prestizowa-nagroda-na-targach-w-cannes.html
- 21. Polska. MARKET INSIGHTS. Raport roczny 2018, Colliers International,
- 22. http://brief.pl/aktualnosci/warszawianki-w-swiatowej-czolowce-podwzgledem-umiejetnosci-i-doswiadczenia-zawodowego/
- 23. https://www.ef.pl/epi/regions/europe/poland/
- 24. http://www.perspektywy.pl/RSW2017/ranking-uczelni-akademickich
- 25. Perspektywy
- Barometr Warszawski XI'17, Konsorcjum: Danae Sp. z o.o. oraz Realizacja Sp. z o.o., 2017
- 27. https://www.worldscapitalcities.com/worlds-safest-capital-cities/
 28. Program ochrony środowiska dla m.st. Warszawy na lata 2017-2020 z perspektywą do 2023 r., Urząd m.st. Warszawy, 2016 29. http://metrowarszawa.gazeta.pl/metrowarszawa/7,141637,22327609,
- warszawa-zajela-pierwsze-miejsce-w-rankingu-na-najbardziej-zadbane.
- 30. http://www.um.warszawa.pl/aktualnosci/wi-cej-sprzedanych-bilet-w 31. http://www.um.warszawa.pl/aktualnosci/rekordowy-sezon-2017
- 32. BADANIE WARUNKÓW PROWADZENIA DZIAŁALNOŚCI GOSPODARCZEJ W M.ST. WARSZAWIE. Raport z badania, KANTAR MILLWARD BROWN,
- 33. http://www.um.warszawa.pl/aktualnosci/warszawa-miastem-zr-wnowaonego-rozwoju-i-przedsi-biorczo-ci

Chapter 2:

- http://www.lot.com/pl/pl/ https://www.alitalia.com/pl_pl/
- https://www.emirates.com/pl/polish/ Warsaw Chopin Airport
- http://www.ulc.gov.pl/_download/statystyki/2017/wg_portow_lotniczych_4kw2017.pdf
- http://www.lotnisko-chopina.pl/pl/samochod.html https://maps.google.pl/
- https://www.lotnisko-chopina.pl/pl/aktualnosci-i-wydarzenia/0/741/
- szczegoly.html http://www.pasazer.com/
- news/37663raport.aci.lotnisko.chopina.liderem.wzrostu.w.2017.r.html http://www.waszaturystyka.pl/transport/item/6547-bardzo-dobry-rok-europejskich-lotnisk.html
- 11. https://www.lotnisko-chopina.pl/pl/aktualnosci-i-wydarzenia/0/431/ szczegoly.html
- https://www.lotnisko-chopina.pl/pl/aktualnosci-i-wydarzenia/0/679/ szczegoly.html
- https://www.lotnisko-chopina.pl/pl/aktualnosci-i-wydarzenia/0/633/ szczegoly.html
- 14. Warsaw Modlin Airport 15. https://modlinairport.pl/odbieram-pasazera/dojazd
- https://www.modlinbus.pl/strony/page/dojazd-z-warszawy-centrum-na-lotnisko-modlin
- 17. https://www.modlinairport.pl/aktualnosc/juz-5-lat 18. https://www.modlinairport.pl/aktualnosc/10-mln-pasazerow
- 19. https://www.modlinairport.pl/aktualnosc/az-5-nowych-tras-linii-lotniczych-ryanair-z-lotniska-warszawamodlin-zima-20172018
- Custom analysis on the basis of: Tourism in Warsaw. Report 2016, Warsaw Tourist Office, 2017; Warsaw Chopin Airport; Warsaw Modlin Airport; http://www.krakowairport.pl/pl/lotnisko,c94/aktualnosci,c120/krakow-airport-podsumowanie-2017-i-plany-na-2018,a2791.html; Gdansk Lech Walesa Airport; https://www.katowice-airport.com/pl/lotnisko/aktualnosc/718990#; http://airport.wroclaw.pl/lotnisko/olotnisku/statystyki/statystyki-ogolne/; https://www.airport-poznan.com. pl/pl/port-lotniczy/statystyki; https://www.bud.hu/file/documents/1/1815/ bud_traffic_report_2017_2018_1.pdf; Traffic Report – 2017, Prague Airport; https://www.viennaairport.com/en/company/investor_relations/ news/traffic_results?news_beitrag_id=1516031056393; Monthly Traffic Report 2017, Munich Airport
- 21. http://rozklad-pkp.pl/ 22. https://www.intercity.pl/pl/site/o-nas/dzial-prasowy/aktualnosci/2017-
- kolejny-rekordowy-rok-pkp-intercity.html

 23. Badanie opinii turystów odwiedzających Warszawę w 2017 r.,
 Konsorcjum: Danae Sp. z o.o. i Realizacja Sp. z o.o., 2017

Chapter 3:

Custom analysis on the basis of Warsaw Tourist Office, City of Warsaw

- and Ministry of Sport and Tourism
- Turystyka w m.st. Warszawie w 2017 r., Urząd Statystyczny w Warszawie, 2018
- TURYSTYKA W M.ST. WARSZAWIE W I KWARTALE 2017 R., Urzad
- Statystyczny w Warszawie
 TURYSTYKA W III KWARTALE 2017 R. M.st. WARSZAWA, Urzad
- Statystyczny w Warszawie TURYSTYKA W IV KWARTALE 2017 R. M.st. WARSZAWA, Urząd 6.
- Statystyczny w Warszawie Wykorzystanie turystycznych obiektów noclegowych w 2017 roku, GŁÓWNY URZĄD STATYSTYCZNY, 2018
- https://www.airdna.co/market-data/app/pl/default/warsaw/overview
- RAPORT 2017. Rynek Hotelarski w Polsce. Wydanie specjalne czasopisma ŚWIAT HOTELI, BROG Marketing Sp. z o.o. S.K., LIPIEC-
- Konsorcjum: Danae Sp. z o.o. i Realizacja Sp. z o.o., 2017
- 12. https://www.worldtravelawards.com 13. http://www.e-hotelarz.pl/mht/?p=41689 14. http://www.tur-info.pl/p/ak_id,46391,,hotel,obiekt_
- noclegowy,nagrody,holidaycheck,serwis_rezerwacyjny,holidaycheck. html

- The Royal Łazienki Museum in Warsaw
- https://www.lazienki-krolewskie.pl/pl/aktualnosci/lazienki-krolewskie-znagroda-lider-dostepnosci
- https://www.lazienki-krolewskie.pl/pl/nasze-projekty/ogrody-swiatla
- https://www.lazienki-krolewskie.pl/pl/aktualnosci/festiwal-swiatla-
- lampiony-chinska-muzyka-parzenie-herbaty Museum of King Jan III's Palace at Wilanów http://mrot.pl/7-aktualnosci/1276-krolewski-ogrod-swiatla-w-wilanowie-
- najlepszy-produkt-turystyczny-mazowsza-2017 https://www.pot.gov.pl/pl/nowosci/wiadomosci-z-pot/prestizowecertyfikaty-pot-przyznane#t
- http://unysyka/24.tv/gabinety-starozytnosci-wilanowie-otwarte/
 National Museum in Warsaw
 https://www.mnw.art.pl/kolekcje/galer/galeria-wzornictwa/

- 11. http://www.mnw.art.pl/wystawy/biedermeier,199.html 12. http://warszawa.wyborcza.pl/warszawa/7,54420,22463703,jak-zylizamozni-mieszczanie-zanim-powstala-ikea.html 13. The Royal Castle in Warsaw – Museum
- http://www.rp.pl/Muzea/170119202-Malarze-krolewscy-i-zamkowe-ogrody.html
- https://www.zamek-krolewski.pl/zwiedzanie/archiwum-wystaw-czasowych/polskie-biale-zloto.-porcelana-z-korca-i-baranowki-z-kolekcji-
- andrzeja-wasilewskiego 16. The Warsaw Rising Museum
- 17. https://www.1944.pl/artykul/premiera-spotow-szpital-i-kamienica,4679.
- 18. https://www.1944.pl/artykul/podsumowanie-roku-2017,4756.html 19. http://warszawa.wyborcza.pl/warszawa/7,54420,21991462,muzeum-
- powstania-warszawskiego-slupy-pamieci-wrocily-do-parku.html

 20. POLIN Museum of the History of Polish Jews
- 21. http://www.polin.pl/pl/aktualnosci/2017/04/05/europa-nostra-2017-dla-muzeum-polin
- 22. http://www.polin.pl/pl/krew 23. The Fryderyk Chopin Museum in Warsaw
- https://wawalove.wp.pl/manuskrypt-fragmentu-ballady-g-moll-chopina-trafil-do-warszawy-6178762798434433a
- https://www.tvp.info/33194247/rekopis-wiosny-w-muzeum-chopina-w-nim-zaklete-sa-emocje
- 26. http://pl.chopin.nifc.pl/institute/events/news/id/4366 27. Polish Army Museum
- http://www.muzeumwp.pl/aktualnosci/894,jozef-pilsudski-150-rocznica-urodzin-oficjalne-otwarcie-wystawy.php
- http://www.muzeumwp.p//aktualnosci/893,oficjalna-prezentacja-nowo zakupionej-kolekcji-militariow-polskich.php
- http://www.pap.pl/aktualnosci/news,1197055,macierewicz-kolekcja-muzeum-wojska-polskiego-pomoze-zrozumiec-nasza-historie.html
- 31. Centre for Contemporary Art Ujazdowski Castle
 32. http://u-jazdowski.pl/program/wystawy/pozna-polskosc?tid=t_content
- 33. http://u-jazdowski.pl/program/wystawy/utrata-rownowagi 34. Zachęta National Gallery of Art
- 35. https://zacheta.art.pl/pl/wystawy/maria-lassnig 36. https://zacheta.art.pl/pl/wystawy/gordon-parks

- 37. Copernicus Science Centre
 38. http://www.niebokopernika.pl/szczegoly-wydarzenia/repertoire/detail/ halo-ziemia/
 39. http://www.kopernik.org.pl/news/n/halo-ziemia-najlepszym-filmem-
- festiwalu-immersive/ 40. https://iff.multimeios.pt/festival/
- 41. http://www.kopernik.org.pl/wystawy/powietrze/o-wystawie0/42. PGE Narodowy Stadium
- https://www.pgenarodowy.pl/aktualnosci/7928,kosmiczna-ceremonia-i-mecz-otwarcia-lotto-eurovolley-poland-2017
 44. http://www.lottoeurovolley2017.com/aktualnosci/441-ceremonia-otwarcia-lotto-eurovolley-poland-2017-na-pge-narodowym
- https://www.pgenarodowy.pl/aktualnosci/7751,depeche-mode-ponownie-na-pge-narodowym 46. https://www.pgenarodowy.pl/aktualnosci/7595,coldplay-zagral-na-pge-
- 47. Palace of Culture and Science in Warsaw
 48. http://www.rp.pl/Promocja-turystyczna/311039963-25-targi-TT-Warsaw-
- -jubileuszowe-swieto-branzy-turystycznej.html 49. http://warszawa.wyborcza.pl/warszawa/7,54420,21670293,wystawadali-kontra-warhol-w-pkin-polaczyla-ich-milosc-do.html 50. City Zoological Garden in Warsaw
- http://www.um.warszawa.pl/aktualnosci/pantery-nie-ne-ponownie-w-warszawskim-zoo
- 52. https://tvnwarszawa.tvn24.pl/informacje,news,zoo-pokazalo-wybiegdla-panter-brlokator-na-konferencje-nie-wyszedl, 238409.html

 53. http://film.onet.pl/wiadomosci/azyl-daniel-bruehl-i-jessica-chastain-na-

specjalnym-pokazie-filmu-w-polsce/q9fmzm

- 54. Badanie opinii turystów odwiedzających Warszawę w 2017 r.,
- Konsorcjum: Danae Sp. z o.o. i Realizacja Sp. z o.o., 2017 55. http://www.um.warszawa.pl/aktualnosci/wielkie-odliczanie-do-otwarcia muzeum-warszawy
- 56. Stołeczna Estrada
- 57. Walk Events Sp. z o.o
- 58. https://www.pgenarodowy.pl/aktualnosci/7924,35-tysiecy-
- kibicowlekkoatletyki-na-pge-narodowyr 59. Alter Art Festival Sp. z o.o.
- 60. City of Warsaw
- 61. https://www.pot.gov.pl/pl/nowosci/wiadomosci-z-pot/prestizowe-
- certyfikaty-pot-przyznane#t 62. http://mrot.pl/7-aktualnosci/1275-najlepsze-produkty-turystycznewoiewodztwa-mazowieckie
- 63. Teatr Wielki Polish National Opera
- 64. Warsaw Philharmonic
- 65. National Theatre in Warsaw
- 66. Roma Musical Theatre
- 67. https://wawalove.wp.pl/praga-jest-cool-warszawska-dzielnica
- doceniona-przez-business-insider-6178760924722817a 68. http://warszawa.naszemiasto.pl/artykul/oto-najmodniejsze
- swiecie-warszawa-w-scislej.4316352,galop,t.jd,tm.html 69. http://www.dailymail.co.uk/travel/travel_news/article-5136095/ Hamburg-ranked-best-place-WORLD-night-out.html?ito=social-
- Analiza walorów turystycznych powiatów i ich bezpośredniego otoczenia. Notatka informacyjna, GŁÓWNY URZĄD STATYSTYCZNY, 2017

- http://www.um.warszawa.pl/aktualnosci/rozpocz-si-rok-rzeki-wis-y
- http://www.um.warszawa.pl/aktualnosci/rok-rzeki-wis-y-w-warszawie http://www.um.warszawa.pl/aktualnosci/otwarcie-sezonu-letniego-nad
 - wis-weekend-pe-en-nadwi-la-skich-atrakcji http://wawawianki.pl/
- http://www.um.warszawa.pl/aktualnosci/wianki-nad-wis-wielki-piknikwi-toja-ski
- http://www.um.warszawa.pl/aktualnosci/warszawa-le-v-nad-wis

- http://dzielnicawisla.um.warszawa.pl/ City of Warsaw http://warszawa.wyborcza.pl/warszawa/7,54420,22807979,przystanek-
- miasto-dlaczego-polubilismy-wisle.html?disableRedirects=true
 10. https://tvnwarszawa.tvn24.pl/informacje,news,wroclawski-zyczliwek-podroznik-brzadomowil-sie-na-bulwarach,241771.html
- 11. http://www.um.warszawa.pl/aktualnosci/dzielnica-wis-przywita-nec 12. Museum of Modern Art
- 13. http://www.um.warszawa.pl/aktualnosci/nowe-miejsce-nowa-wystawa
- 14. http://www.um.warszawa.pl/aktualnosci/kolejny-fragment-bulwar-v
- 15. http://www.um.warszawa.pl/aktualnosci/bulwarv-ca-e-dla-mieszka-c-w
- https://tvnwarszawa.tvn24.pl/informacje,news,miasto-wprowadza-wsi-brwislany-system-informacji,231219.html
- 17. http://www.um.warszawa.pl/aktualnosci/nie-zgubisz-si-nad-wis-pc e-w-tym-nie-tylko-gps
- https://wawalove.wp.pl/bedziemy-mogli-podgladac-wisle-na-ekranie-trafi-do-serwisu-qooqle-street-view-6178766406338177a
- http://warszawa.wyborcza.pl/warszawa/1,34862,18413799,dzika-przyroda-nad-wisla-6-miejsc-gdzie-spotkasz-dzikie-zwierzeta.html 20. http://www.um.warszawa.pl/aktualnosci/nowa-sportowa-atrakcja-
- nad-wis 21. http://warszawa.wyborcza.pl/warszawa/7,54420,21819288,w-czerwcuotwarcie-praskiej-strefy-rekreacyjnej-na-poniatowce.html

- SZACUNEK PRZYJAZDOWEGO RUCHU TURYSTYCZNEGO DO WARSZAWY
- W 2017 R., dr hab. Ewa Dziedzic, prof. SGH, 2018 Badanie opinii turystów odwiedzających Warszawę w 2017 r.,
- Konsorcjum: Danae Sp. z o.o. i Realizacja Sp. z o.o., 2017 Custom analysis on the basis of "Badanie opinii turystów
- odwiedzających Warszawę w 2017 r.", Konsorcjum: Danae Sp. z o.o. i Realizacja Sp. z o.o., 2017 City of Warsaw custom analysis on the basis of "Badanie opinii turystów odwiedzających Warszawę w 2017 t.", Konsorcjum: Danae Sp. z o.o. i Realizacja Sp. z o.o., 2017

- Chapter 7:
- Apper 7:
 Przemysł Spotkań w Warszawie 2017, A. Pawlicz, M. Sidorkiewicz, 2018
 Analiza walorów turystycznych powiatów i ich bezpośredniego
 otoczenia. Notatka informacyjna, GŁÓWNY URZĄD STATYSTYCZNY, 2017
 2016 ICCA Statistics Report. Country & City Rankings, International
- Congress and Convention Association 2017 ICCA Statistics Report. Country & City Rankings, International
- Congress and Convention Association
 Warsaw Meetings Guide 2018, WARSAW CONVENTION BUREAU City of Warsaw custom analysis on the basis of "Badanie opinii turystów odwiedzających Warszawę w 2017 r.", Konsorcjum: Danae Sp. z o.o.

i Realizacja Sp. z o.o., 2017

- Chapter 8: Badanie opinii turystów odwiedzających Warszawę w 2017 r.,
- Konsorcjum: Danae Sp. z o.o. i Realizacja Sp. z o.o., 2017 Raport z badania ilościowego na temat wizerunku Warszawy wśród mieszkańców wybranych krajów europejskich, ARC Rynek i Opinia, 2017
- Badanie nt. odwiedzania oraz postrzegania Warszawy przez mieszkańców Polski, Kantar Public, 2018 http://www.wirtualnemedia.pl/artykul/ranking-najatrakcyjniejszych-miast-na-swiecie-liderem-paryz#

Photographs:

Introduction: photo City of Warsaw Chapter 4: p. 16: pictures 1 and 2 - photo F. Kwiatkowski; picture 3 - photo Joanna Wishiewska; picture 4 - photo City of Warsaw; picture 5 - photo Julia Sielicka/The Warsaw Rising Museum; picture 6 - photo M. Starowieyska/ POLIN Museum of the History of Polish Jews; p. 17: pictures 1, 6, 7 and 8 - photo City of Warsaw; pictures 2 and 3 - photo F. Kwiatkowski; picture 4 - photo Piotr Bednarski - license CC BY-SA/Zachęta - National Gallery of Art; picture 5 - photo Wojciech Surdziel/Copernicus Science Centre Chapter 5: pictures 1, 2, 3, 4, 6, 7 and 8 - photo City of Warsaw; picture 5 - photo E. Lach/City of Warsaw

All amounts given in euro are calculated based on the average Bank of Poland rate of 29 December 2017 (1 euro = PLN 4.1709

Statystyczny w Warszawie
TURYSTYKA W M.ST. WARSZAWIE W II KWARTALE 2017 R., Urzad

10. http://turvstvka.rp.pl/artvkul/706099.1348758-Profit-Hotel--Jest-dobrze--bedzie-lepiej-.html?p=1

11. Badanie opinii turystów odwiedzających Warszawę w 2017 r.,

