

TOURISM IN WARSAW

REPORT 2017

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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

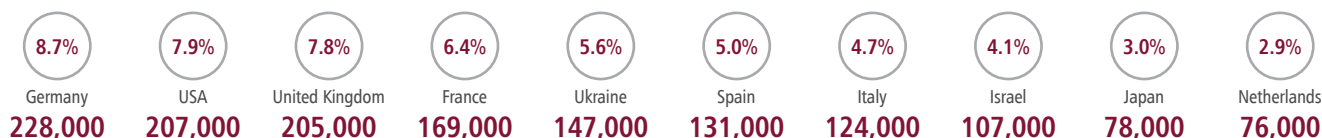
390,000

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)



Means of transport used by tourists coming directly to Warsaw

domestic | foreign



train

36% | 17%



car

36% | 8%



bus/coach

22% | 13%



airplane

6% | 63%

Tourist accommodation and its use

520
tourist accommodation establishments
including **92** hotels

over
39,500
bed places



nearly
3.6 million
tourists have used tourist
accommodation establishments

nearly
6.2 million
nights spent by tourists in tourist
accommodation establishments

Most popular main purposes of visit

domestic | foreign



sightseeing

44% | 29%



rest

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%

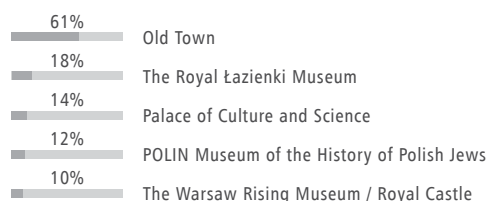
The biggest attractions according to tourists (top 5)



Domestic
tourists



Foreign
tourists



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

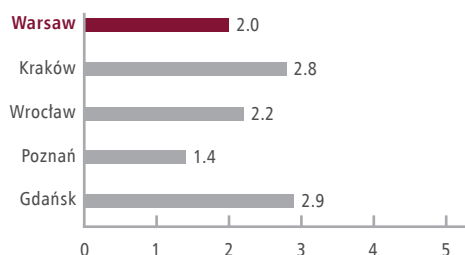


Basic data¹

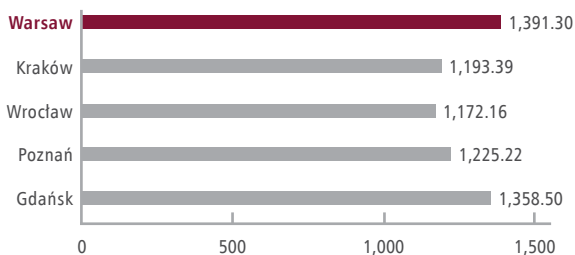


Warsaw economy compared to other selected cities in Poland

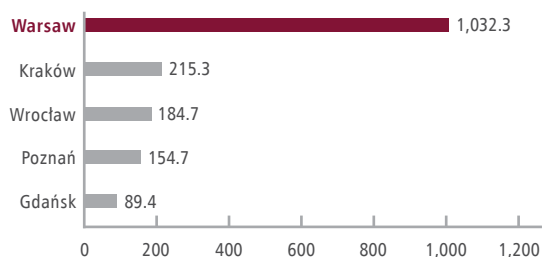
Registered unemployment rate at the end of December 2017 (%)



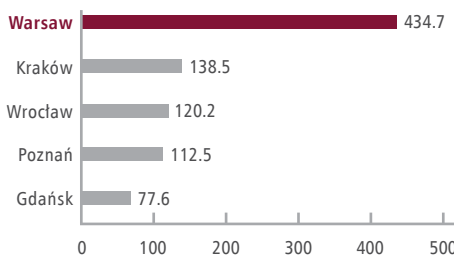
Average monthly gross wages and salaries in enterprise sector in January-December 2017 (euro)



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)



Source^{2, 3, 4, 5}

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

Fitch Ratings gave Warsaw a long-term rating of

"A -"

with a stable outlook



Moody's Investors Service confirmed Warsaw's rating of

"A 2"

with a stable outlook

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

[6th 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 m ²	275,400 m ²	824,700 m ²	23.50-23.75 euro/m ² /month	13.0-16.5 euro/m ² /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}

Warsaw	5,283,600 m²
Kraków	1,100,000 m ²
Wrocław	905,800 m ²
Tricity	697,800 m ²
Katowice	460,600 m ²
Poznań	455,300 m ²
Łódź	437,800 m ²



Office space under construction at the end of 2017 amounted to 768,000 m² – 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 m²** 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

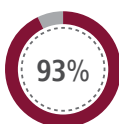


The University of Warsaw has been Poland’s number one university four times in a row according to the Perspektywy Higher Education Institutions League Table. The Warsaw University of Technology came 3rd.²⁴

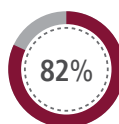


In the academic year 2016/2017, 63 higher education institutions were functioning in Warsaw. There were approx. 227,000 enrolled students of which approx. 19,000 were foreigners making up 29% of all foreigners studying in Poland.²⁵

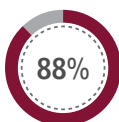
Quality of life in Warsaw



93% of residents have positive impressions associated with Warsaw as a place to live²⁶



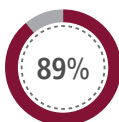
82% of residents, given the choice, would prefer to live in Warsaw²⁶



88% of residents have a positive opinion of safety in the city²⁶

20th place of Warsaw

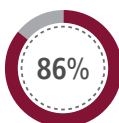
in the World’s Safest Capital Cities league table²⁷



89% of residents have a positive opinion of greenery in the city²⁶

42% of the total area of Warsaw

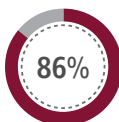
is green space which comprises, among others, 88 parks, 242 squares and greens, 12 nature reserves and 7 Natura 2000 areas²⁸



86% of residents have a positive opinion of cleanliness and tidiness in the city²⁶

1st place of Warsaw

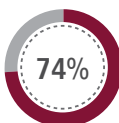
in the league table of largest, most well-tended cities in Poland²⁹



86% of Warsaw residents have a positive opinion of the public transport in the city²⁶

over 1 billion passengers annually

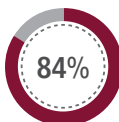
– public transport (buses, trains, metro and trams) is Varsovians’ preferred method of transport³⁰



74% 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



84% 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 entrepreneurship³³

2. ACCESSIBILITY

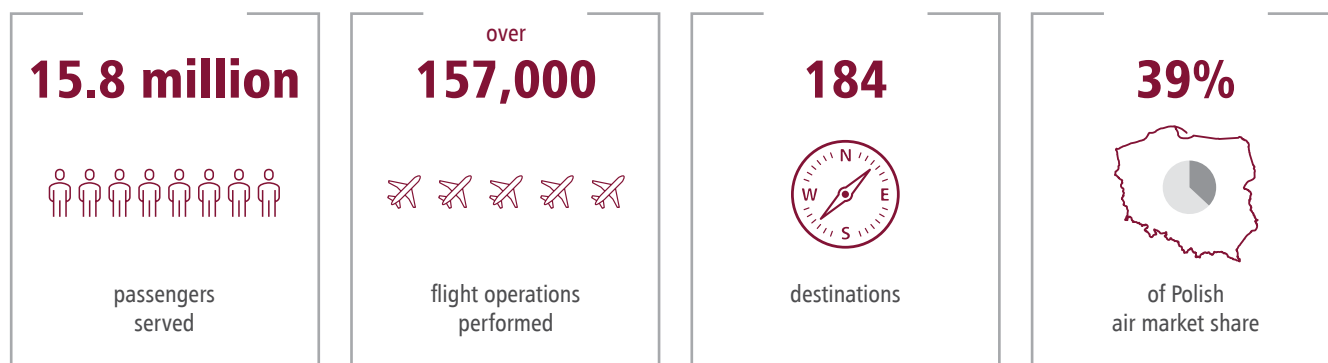


Air

Approximate direct flight times to Warsaw from selected cities

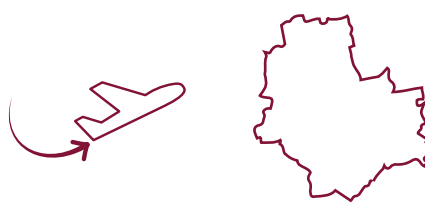


Warsaw Chopin Airport



Top 5 most popular flights to Warsaw⁴

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-Biala 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

approx. 36 km



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



car/taxi/bus



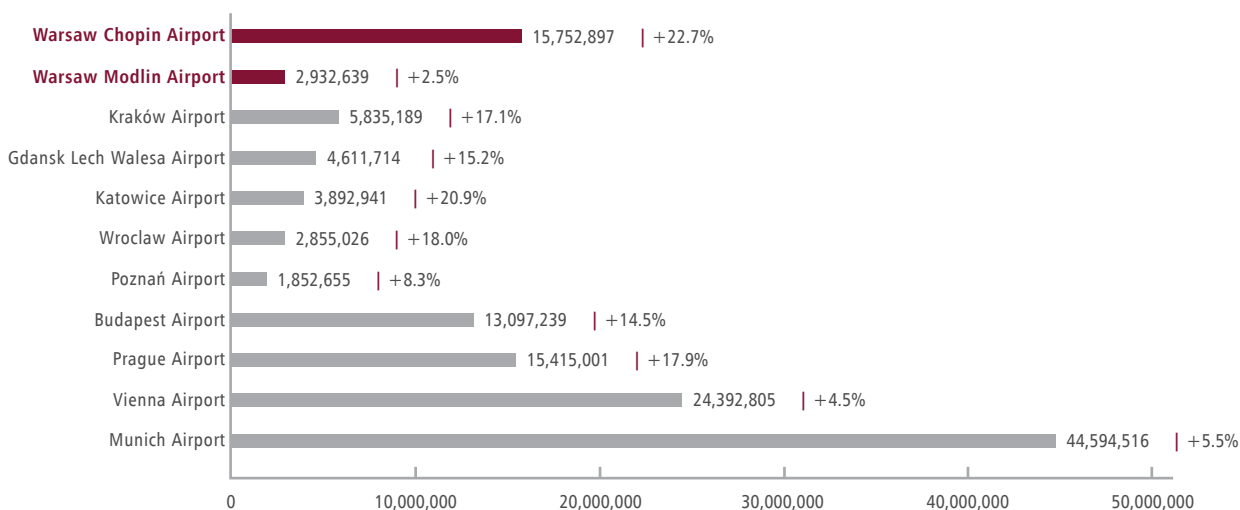
Warsaw Modlin Airport celebrated its **5th birthday** and served its 10 millionth passenger who flew from Cagliari to Warsaw.^{17, 18}



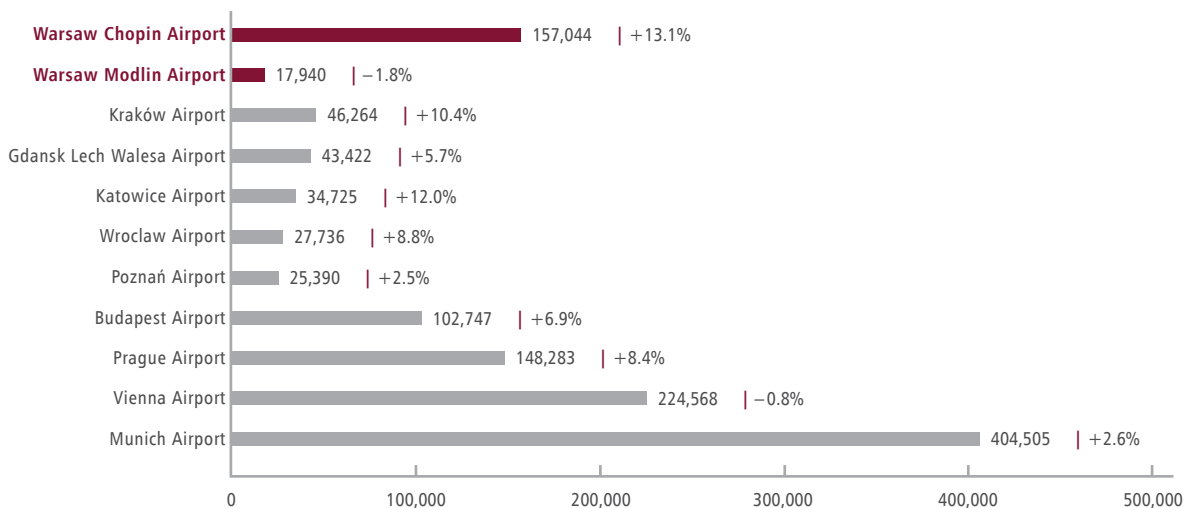
Ryanair opened up **5 new routes** in winter 2017/2018, including Eilat, Seville and Venice.¹⁹

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

Passengers served – number and percentage changes in comparison to 2016

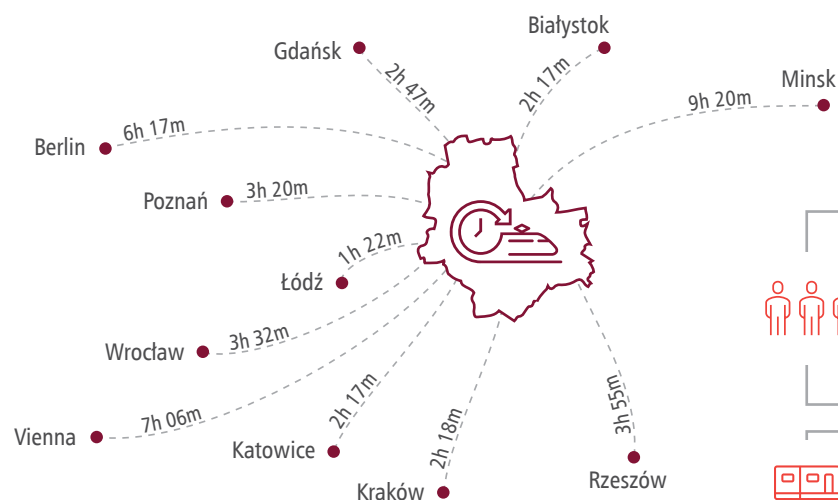


Flight operations performed – number and percentage changes in comparison to 2016



Rail

Direct travel time to Warsaw from selected cities²¹



Most popular PKP Intercity connections were from Warsaw to Kraków, Tricity, Poznań, Białystok, and Katowice. Moreover, the greatest increase in passengers travelling to Warsaw was on the Białystok (+43%), Olsztyn (+32%) and Łódź (+25%) routes.²²



Compared to 2016, more families (+30%), senior citizens (+17%) and students (+7%) took advantage of PKP Intercity services.²²

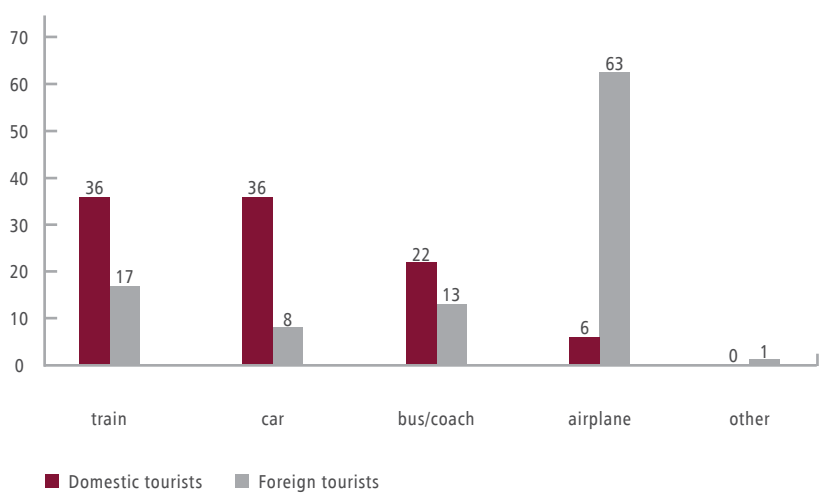
Road⁷

Approximate travel time to Warsaw from selected cities

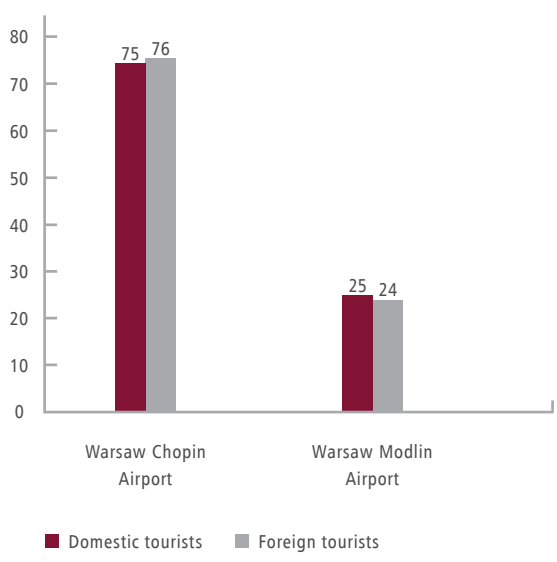


Means of transport used by tourists coming to Warsaw²³

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



520

tourist accommodation establishments



39,507

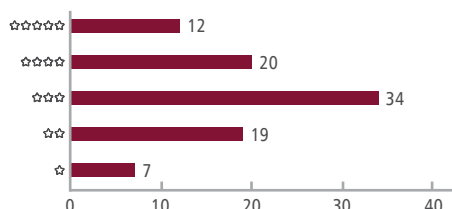
bed places*

*including 100 tent and 80 caravan pitches

Source¹

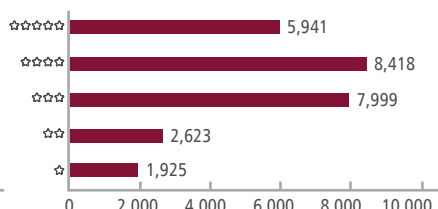
Hotels¹

Number of establishments



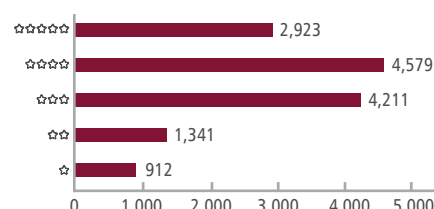
total
92

Number of bed places



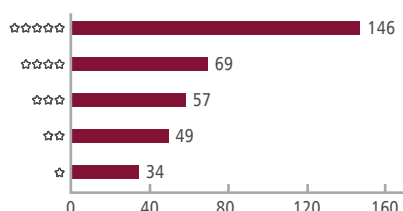
total
26,906

Number of rooms



total
13,966

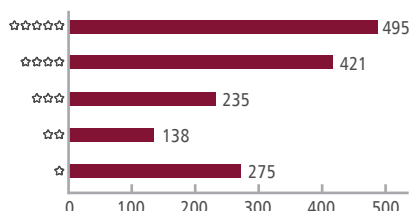
Average price of a double room (euro)*



average
68 euro

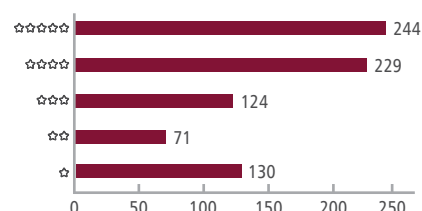
*average calculated on the basis of the lowest prices for a double room in hotels of a given category

Average number of bed places in hotel



average
292

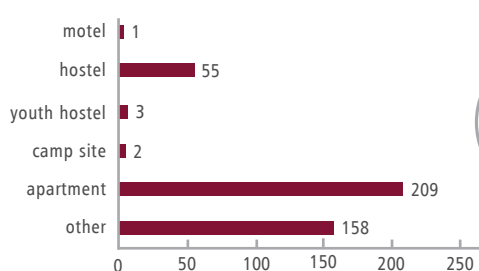
Average number of rooms in hotel



average
152

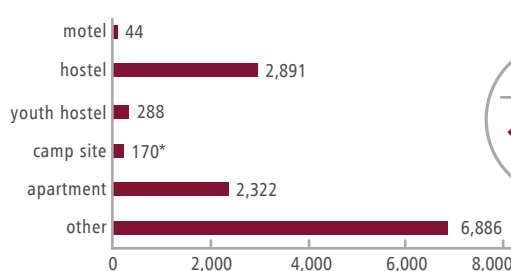
Other tourist accommodation establishments¹

Number of establishments



total
428

Number of bed places



total
12,601

*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 nights spent by tourists in Warsaw



3,539,500

rooms rented by tourists in hotels*

72.4%

occupancy in hotel establishments

highest occupancy in September

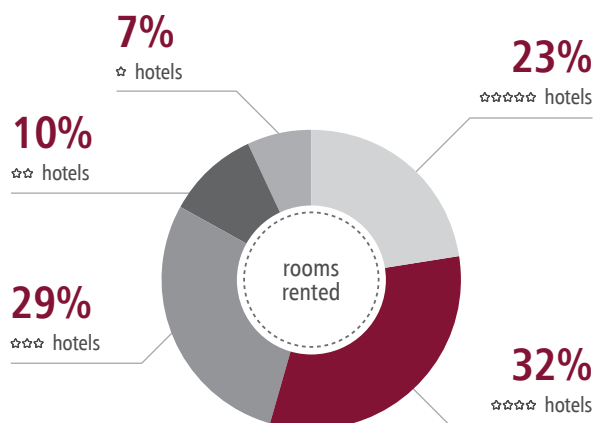
lowest occupancy in January



3.1 pp in comparison to 2016

83%

57%



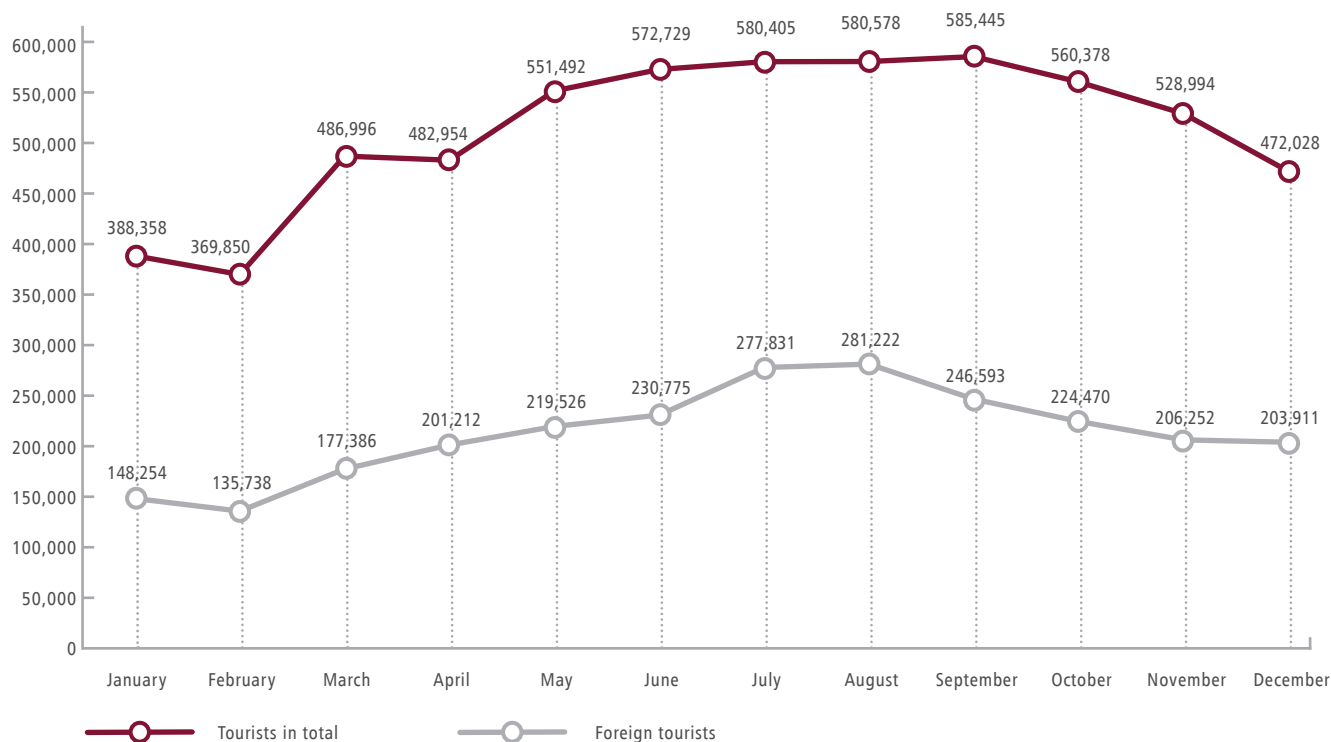
*figures have been rounded to nearest thousand

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



1. United Kingdom	10.2%	6. France	5.0%
2. Germany	8.6%	7. Ukraine	4.5%
3. USA	8.6%	8. Italy	4.5%
4. Israel	7.2%	9. Russia	3.6%
5. Spain	5.2%	10. China (not including Taiwan)	3.5%

Nights spent by tourists by months



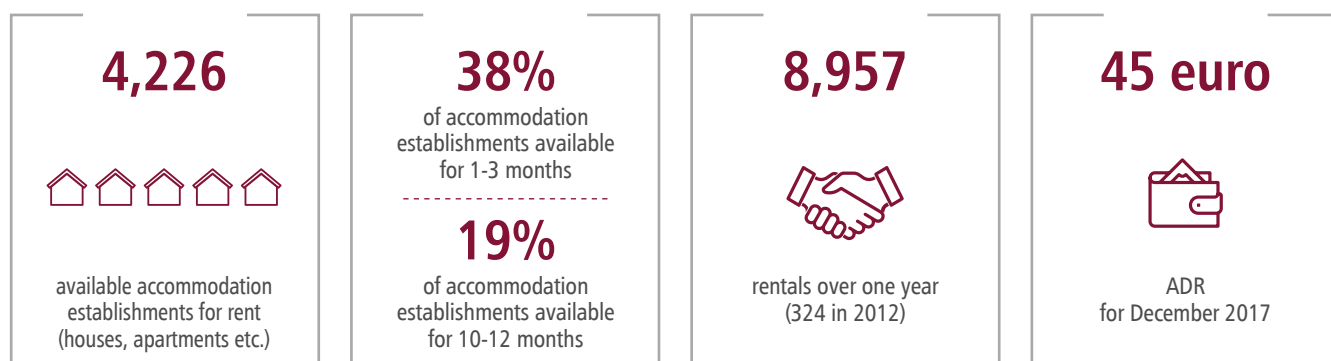
Source^{3, 4, 5, 6}



Source^{2, 7}

Selected tourist accommodation information

Rental of accommodation establishments by Airbnb⁸



↑ **9.2%**

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

*data across 12 months (07.2016-06.2017)

↑ **11.7%**

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

*data across 12 months (07.2016-06.2017)

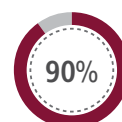


Relation of chained hotels
to non-chained hotels in Warsaw
is half-half, in terms of rooms
it is three to four¹⁰

Source⁹



93% of tourists visiting Warsaw spend the night
within the city boundaries¹¹

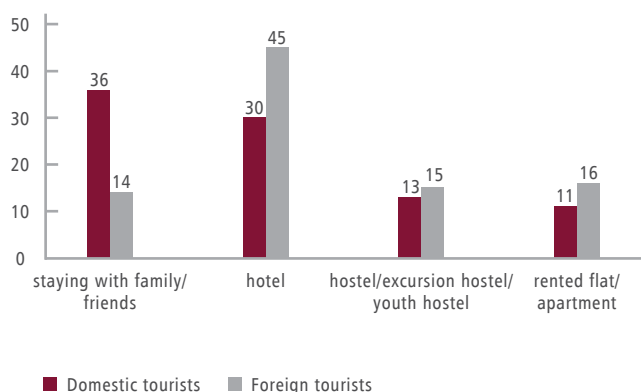


of tourists have a positive opinion
of tourist accommodation*

*people who have used this type of service

Source¹¹

Main types of accommodation used by tourists (%)¹¹



Standard of hotels used by tourists (%)¹¹



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}



3,000,000

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.

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

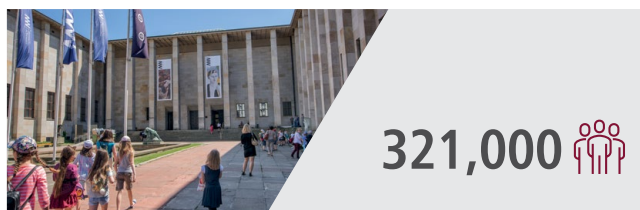


3,280,000

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.

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

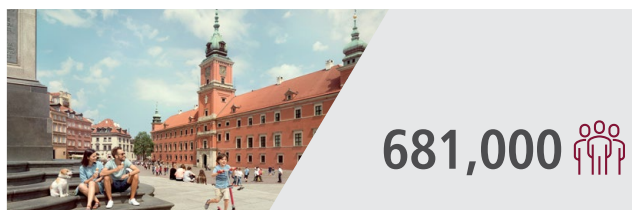


321,000

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

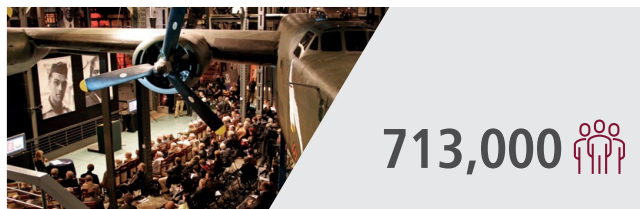


681,000

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”.

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

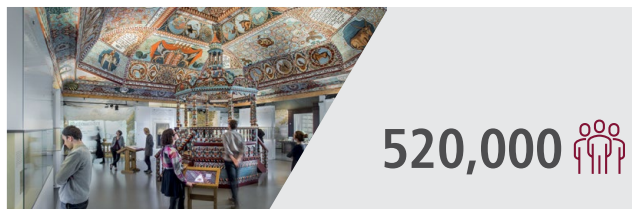


713,000

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.

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



520,000

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.

*approximate data, or data rounded to nearest thousand

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



107,000 

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.

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



326,000 

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.

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



181,000 

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.

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




122,000 

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.

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



1,145,000 

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.

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



2,119,000 

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.

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



639,000** 

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.

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



787,000 

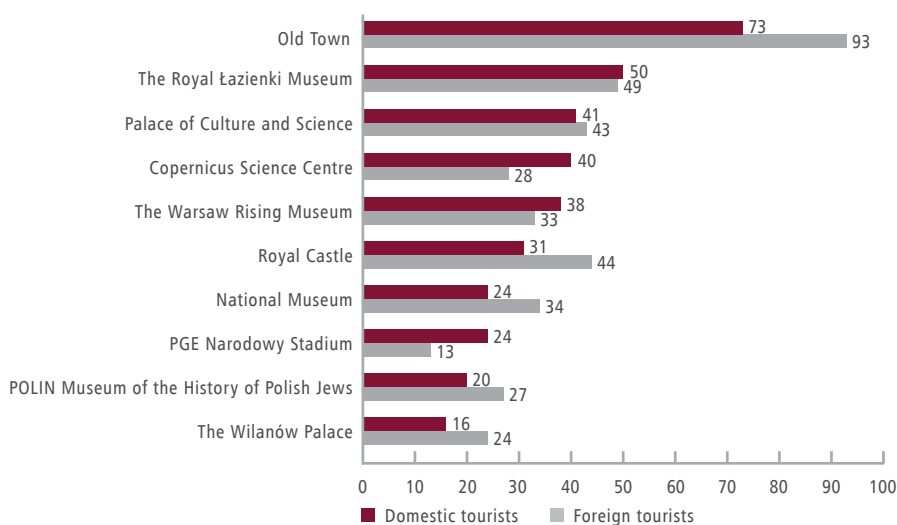
After a few years' break, snow leopards have returned to Warsaw Zoo. The opening of one of the most modern catwalks in Europe for this predatory cat is part of the zoo's mission to protect endangered animal species.

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.

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

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

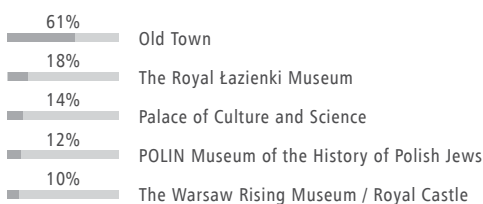
The biggest tourist attractions in Warsaw according to tourists (top 5)*



Domestic tourists

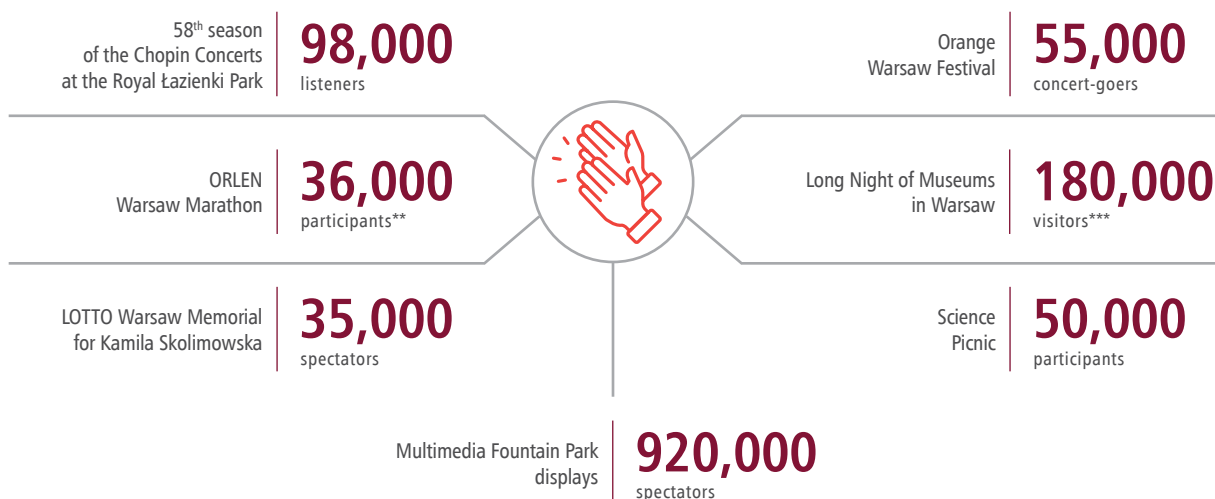


Foreign tourists



*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

**participants of the marathon together with accompanying events

***data from approx. 85% of all institutions that took part in the event

Source^{37, 56, 57, 58, 59, 60}



11% of tourists took part in an event such as a concert, festival, fair or sports event during their stay in Warsaw⁵⁴

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*

Teatr Wielki
- Polish National Opera

294,000
spectators

National Theatre
in Warsaw

88,000
spectators

Warsaw
Philharmonic

117,000
listeners

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

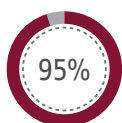


Warsaw was listed as being part of an international group of cities with **the most attractive nightlife**. Poland's capital city was ranked 9th in the Hostelworld booking platform league table beating such metropolitan heavyweights as New York, London and Paris.⁶⁹

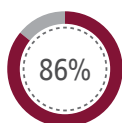


1st place of Warsaw among Polish counties and cities with county rights in terms of the value of the following indicators:⁷⁰

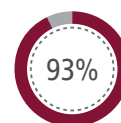
- **tourist attractiveness index**, ahead of Kraków, Nowy Sącz county and Tatra county
- **cultural attractiveness index**, ahead of Kraków, Wrocław and Gdańsk



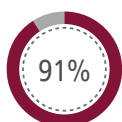
of tourists have a positive opinion of the cultural attractions on offer*



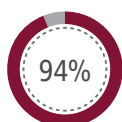
of tourists have a positive opinion of the recreational and sporting facilities on offer*



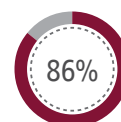
of tourists have a positive opinion of the gastronomy infrastructure*



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
shows



nature
walks



running and biking
competitions



wakeboarding
lessons



activities and games
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 Kupala 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.

This year's Garlands also included dozens of water attractions including:

- cruises on the Vistula on traditional boats
- visits to the e-barge, a newly-opened floating tourist information centre about the Vistula
- water-skiing and wakeboard shows
- rowing competitions on traditional "hamburka" boats



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 Poniałówka 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

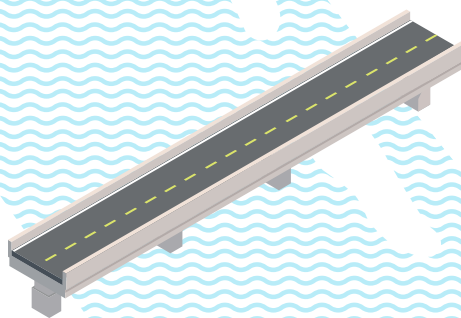
Source⁹



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}



Finding your way beside the Vistula

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



A summer **recreational zone** has been installed on Warsaw's Poniakówka beach. This includes three beach volleyball courts, bars and frames for street workout as well as a folding pitch for beach football and handball. There is an adjacent stand for 200 spectators and a rental spot for sports equipment. And everything is free!²¹

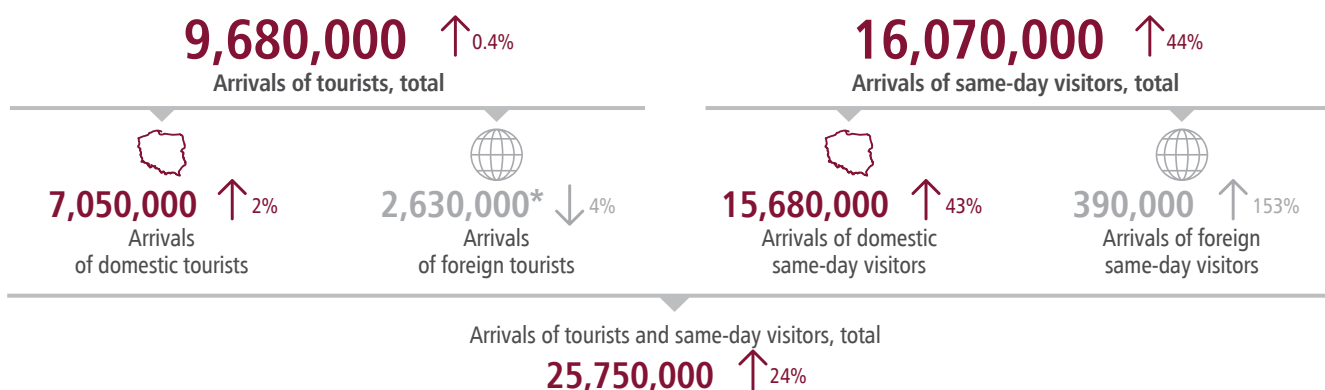


6. TOURIST TRAFFIC CHARACTERISTICS



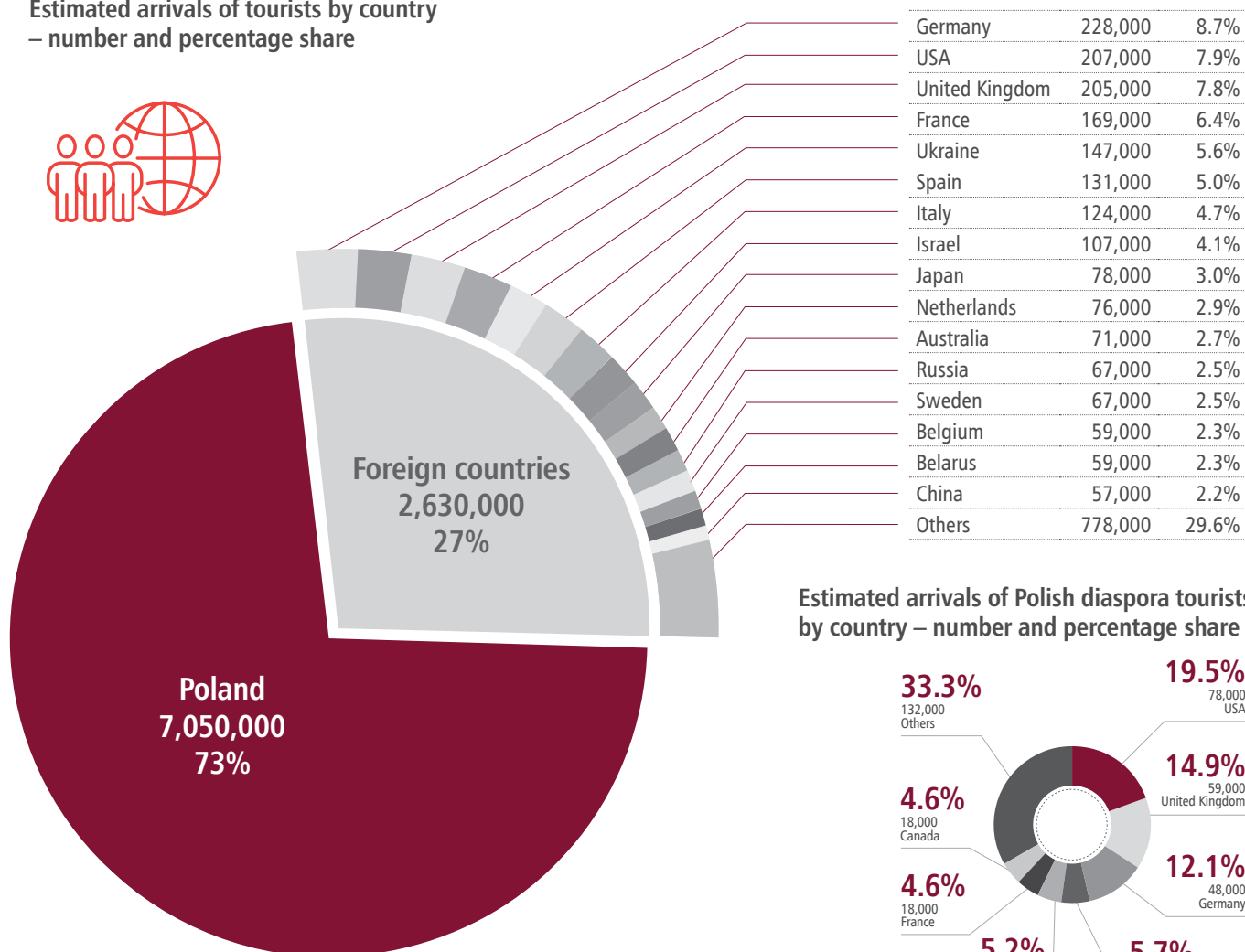
Estimated size of tourist traffic¹

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

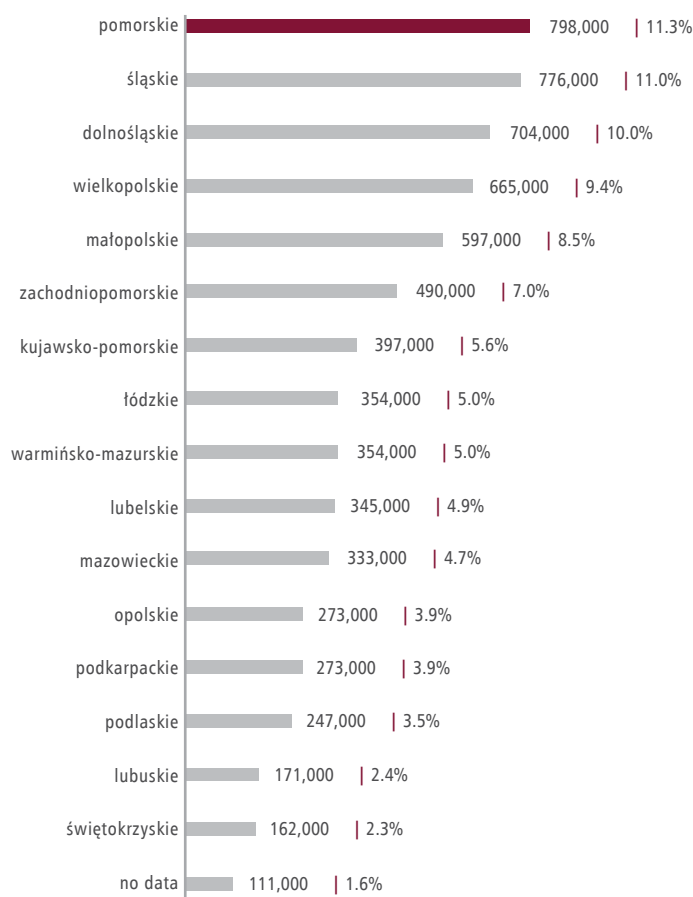


*increase of 4% in arrivals of tourists making use of tourist accommodation establishments that submitted reports to the Central Statistical Office [GUS]; decrease only in terms of arrivals of tourists making use of other forms of accommodation, mainly staying with family/friends

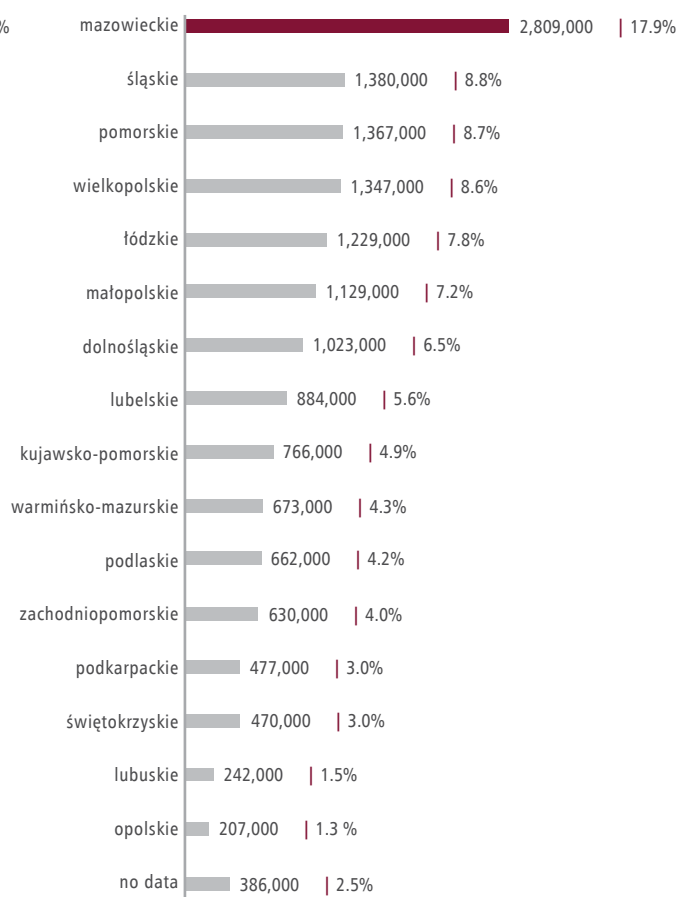
Estimated arrivals of tourists by country – number and percentage share



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

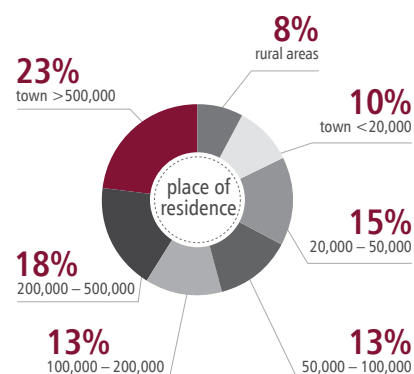
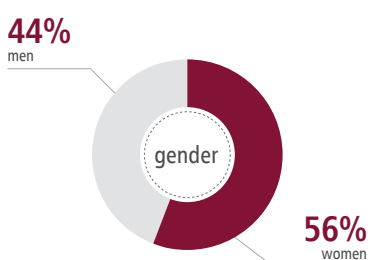
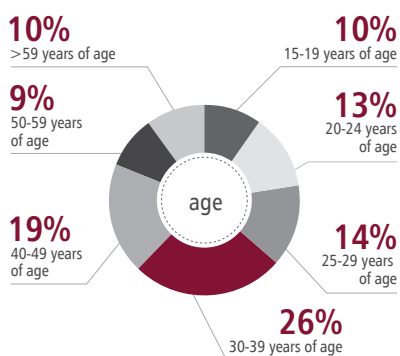


Estimated arrivals of domestic same-day visitors by voivodship – number and percentage share

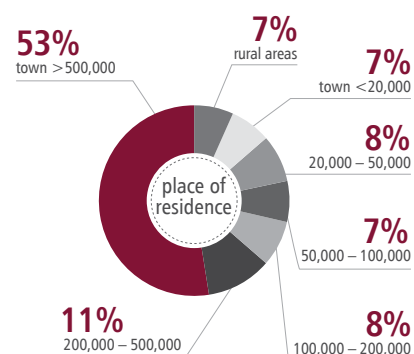
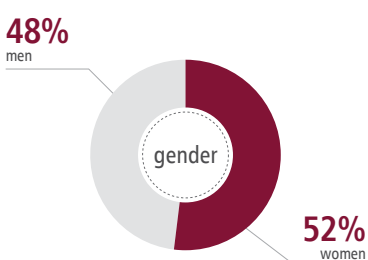
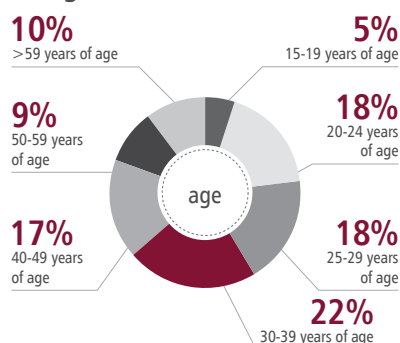


Profile of tourists visiting Warsaw

Domestic tourists²

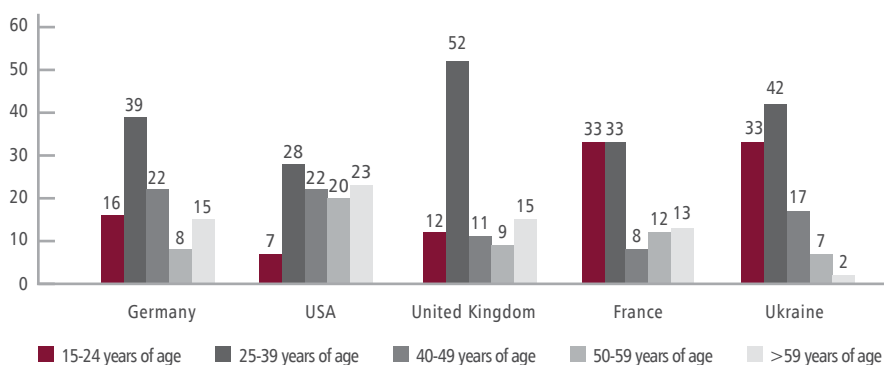


Foreign tourists²

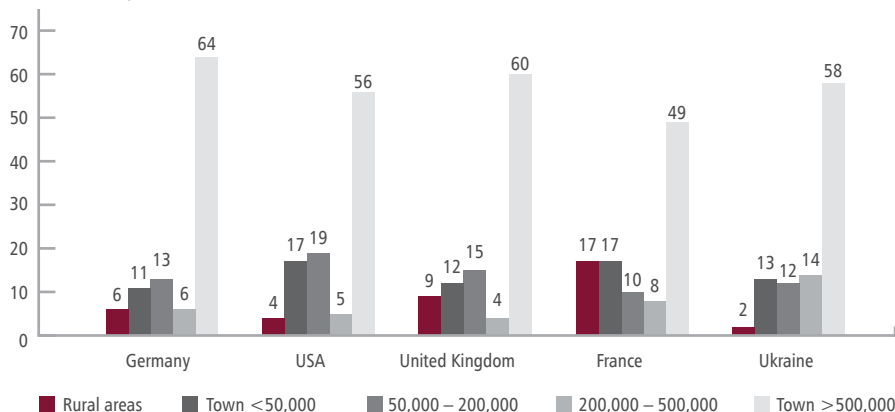


Foreign tourists – main countries³

Divided into age groups (%)

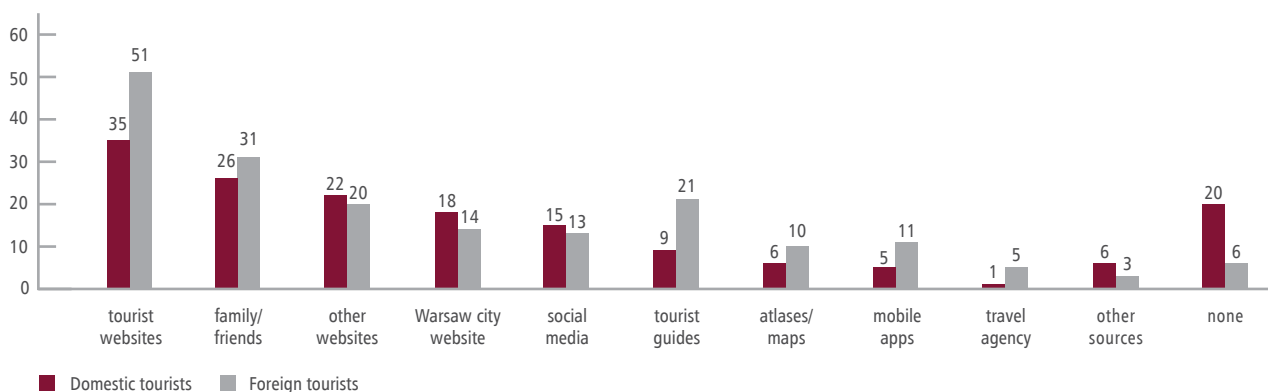


Divided into place of residence (%)



Profile of a tourist's stay in Warsaw

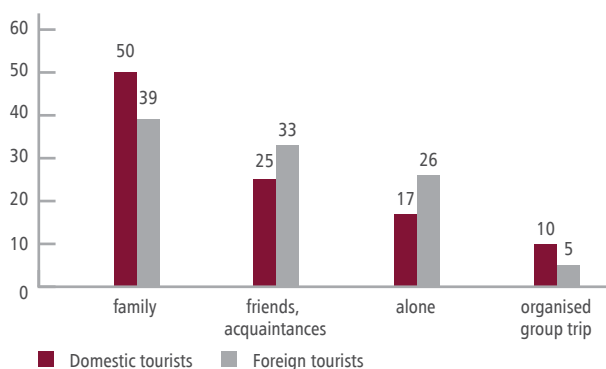
Sources of information about Warsaw (%)^{*}



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

Source²

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



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

Source²

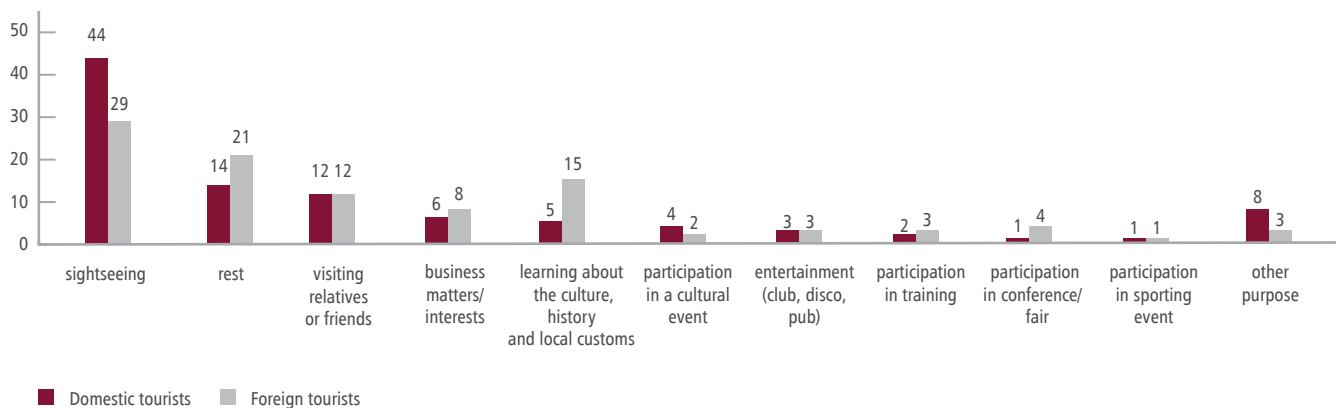


81% of tourists organise their trip to Warsaw by themselves, for 7% of tourists, the trip is organised by family or friends²

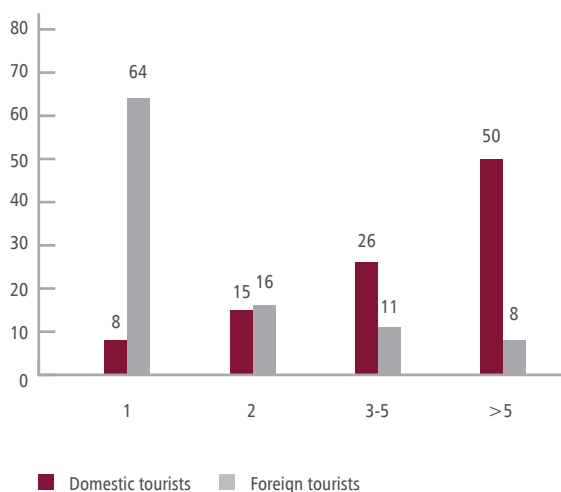


83% of tourists come to Warsaw directly from their place of residence²

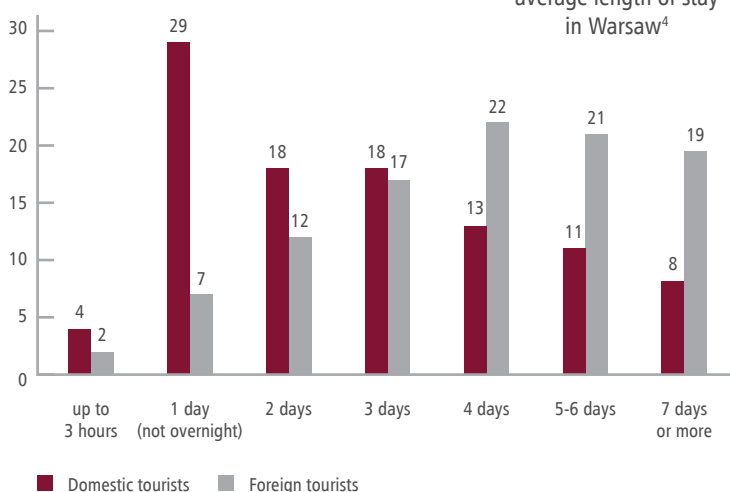
Main purpose of visiting Warsaw (%)²



Number of visits to Warsaw (%)²



Length of stay in Warsaw (%)³

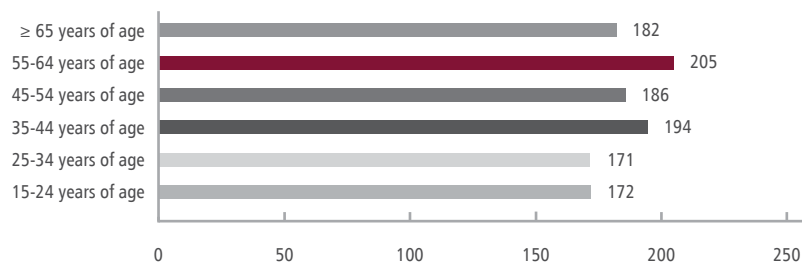


4.65 days

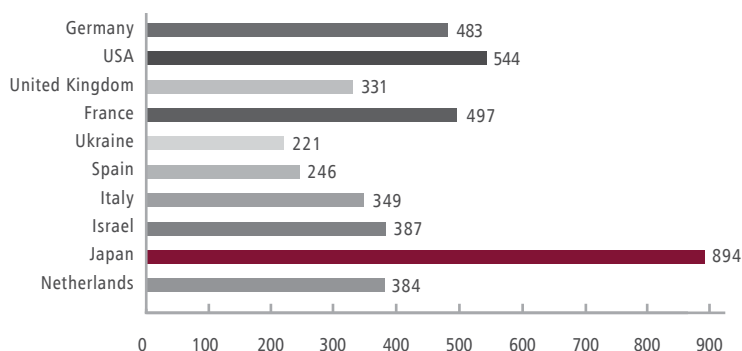
average length of stay in Warsaw⁴

Average declared amount spent per person during stay in Warsaw⁴

Divided into age groups (euro)



Divided into main countries (euro)



194 euro ↑ 17 euro

average declared amount spent per person during stay in Warsaw and change in comparison to 2016



105 euro ↑ 9 euro
domestic tourists



404 euro ↑ 49 euro
foreign tourists

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

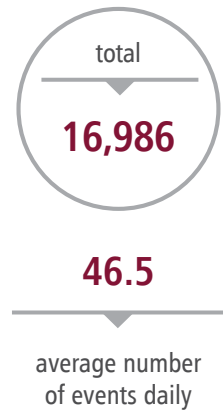
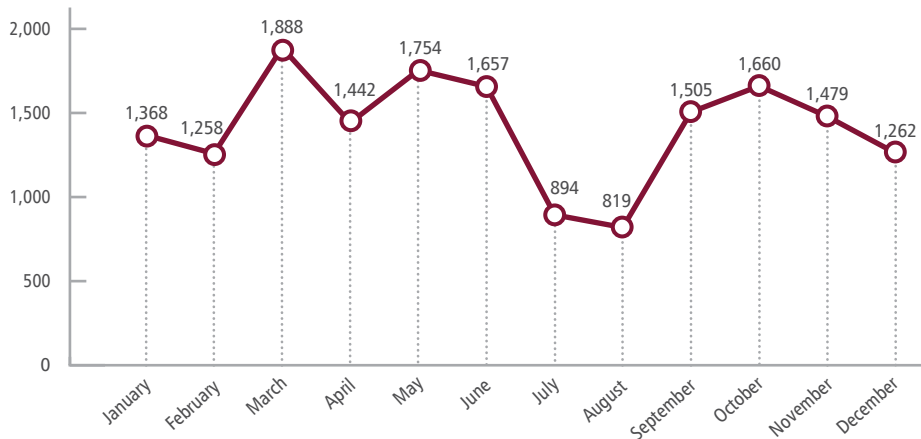
*meetings which take place on a regular basis, involve more than 50 participants and migrate between at least three countries

Warsaw conference market – size and characteristics¹

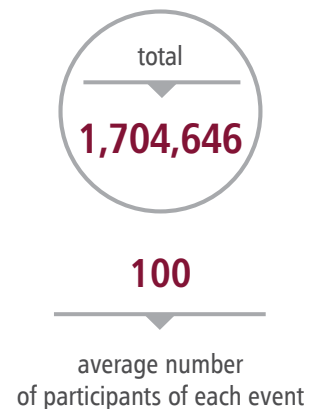
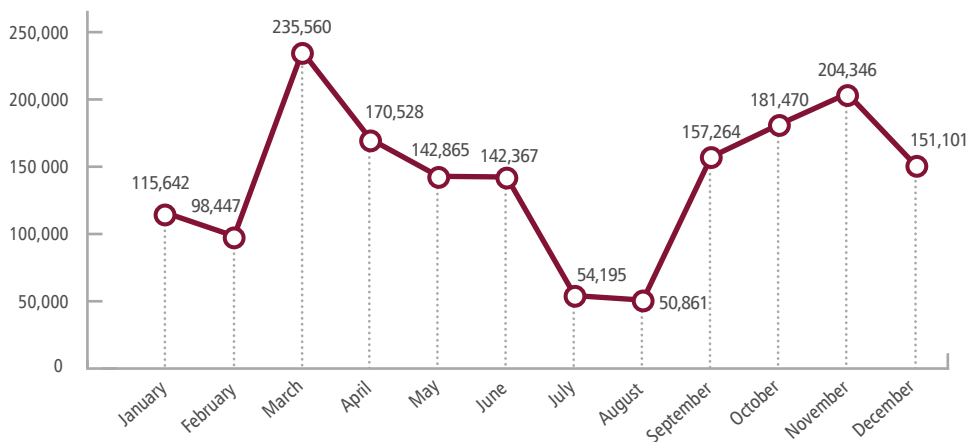
The diagrams presented below are based on data from the Demand Outlook system maintained by Z-Factor as well as additional information collected from 3 fair and conference venues, and 1 venue/hall for special events.

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.

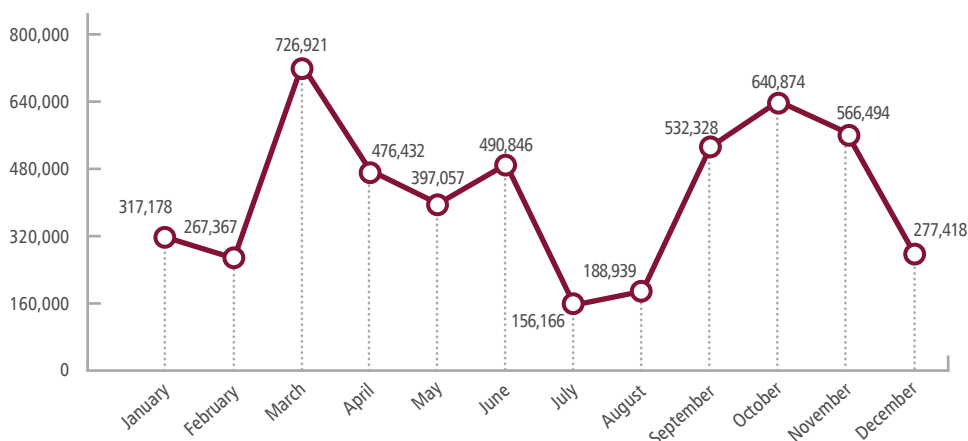
Number of events by month



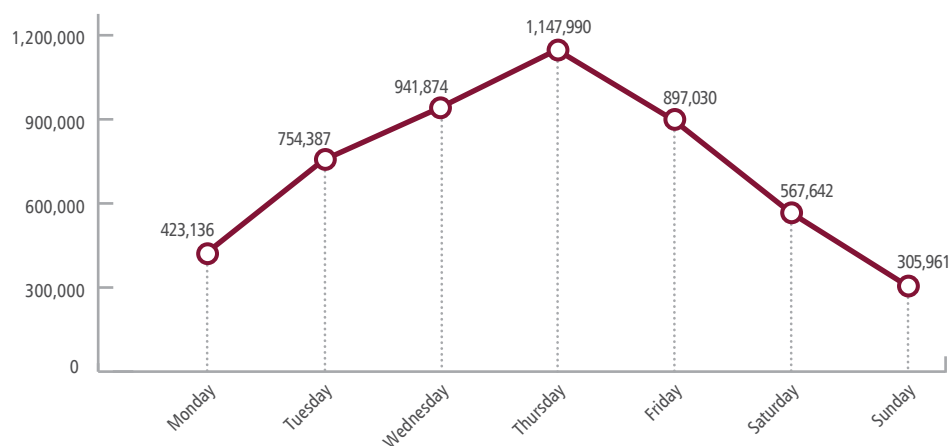
Number of participants of events by month



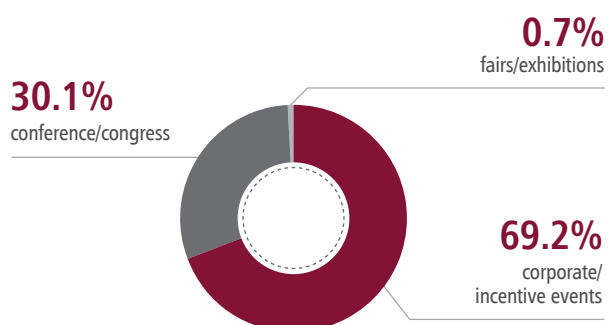
Space used by month (m²)



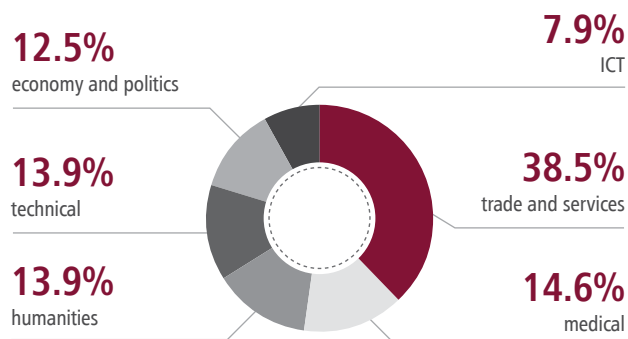
Space used by day of the week (m²)



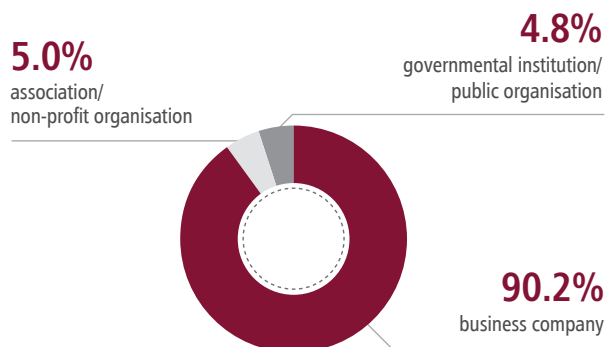
Events by type



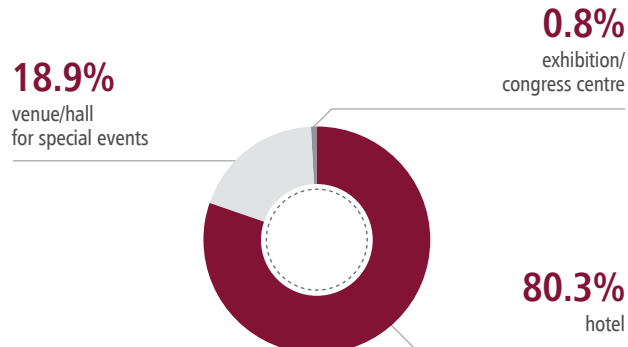
Events by subject group



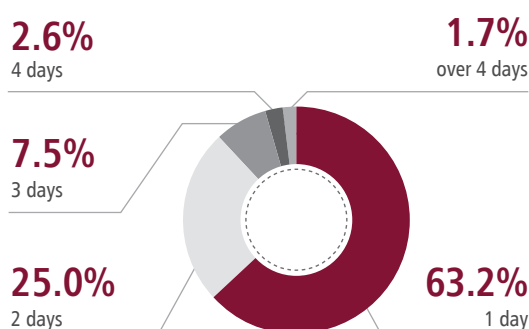
Events by type of organiser



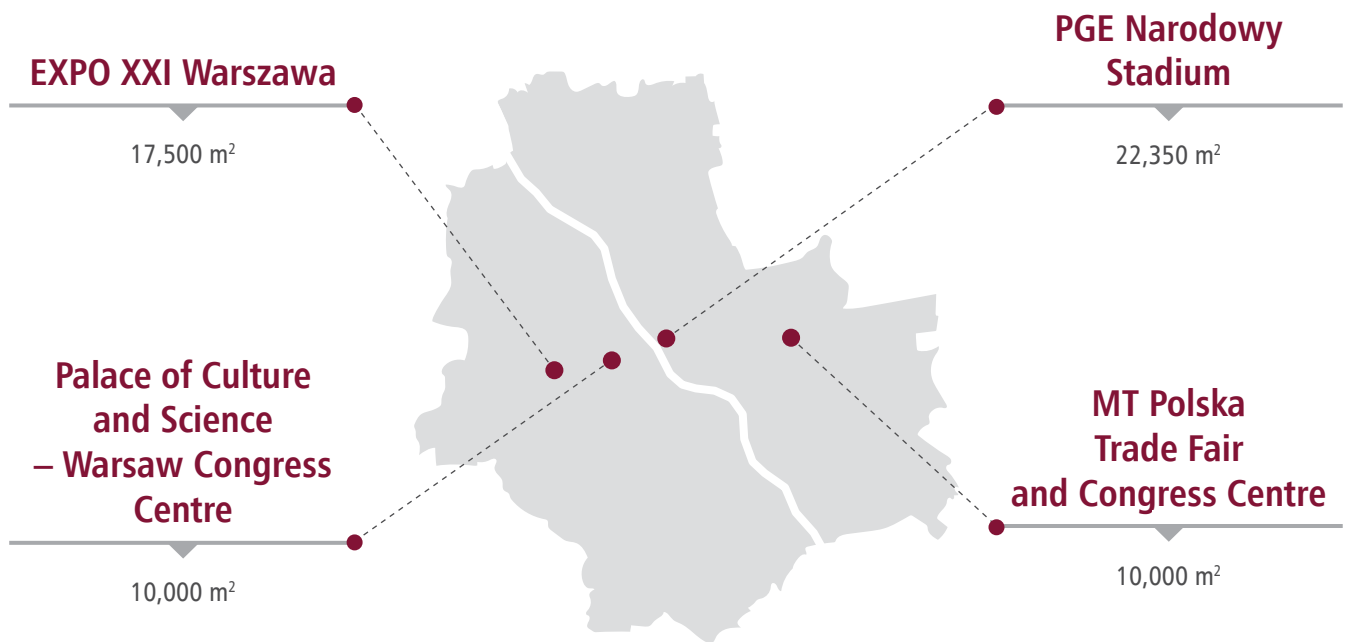
Events by venue type



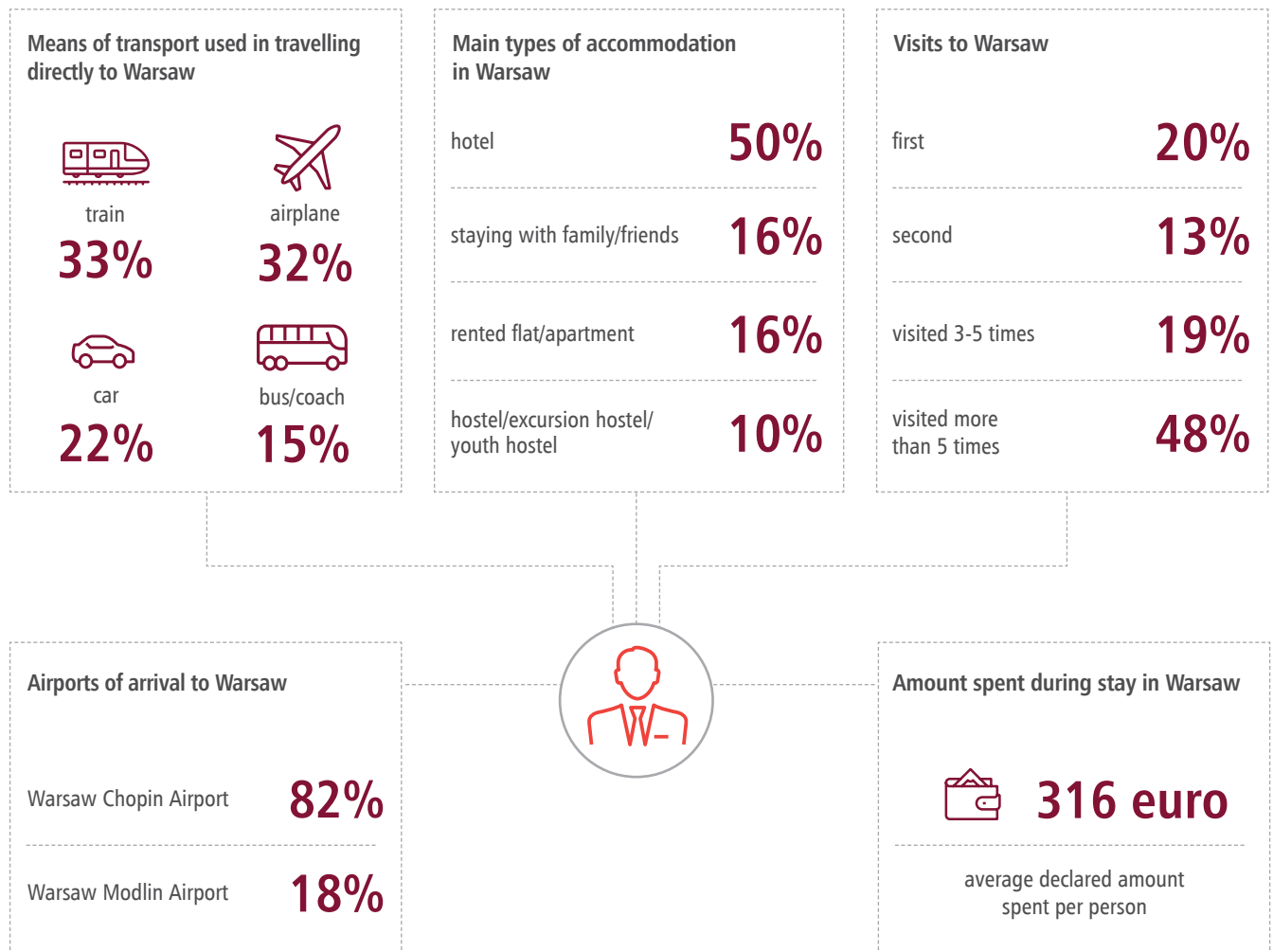
Events by duration



Exhibition space of selected venues in 2017⁵



Tourist traffic characteristics – business tourists⁶



8. WARSAW'S IMAGE



Warsaw according to tourists¹



*on a scale of 1 to 10

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

friendly people



interesting places and monuments

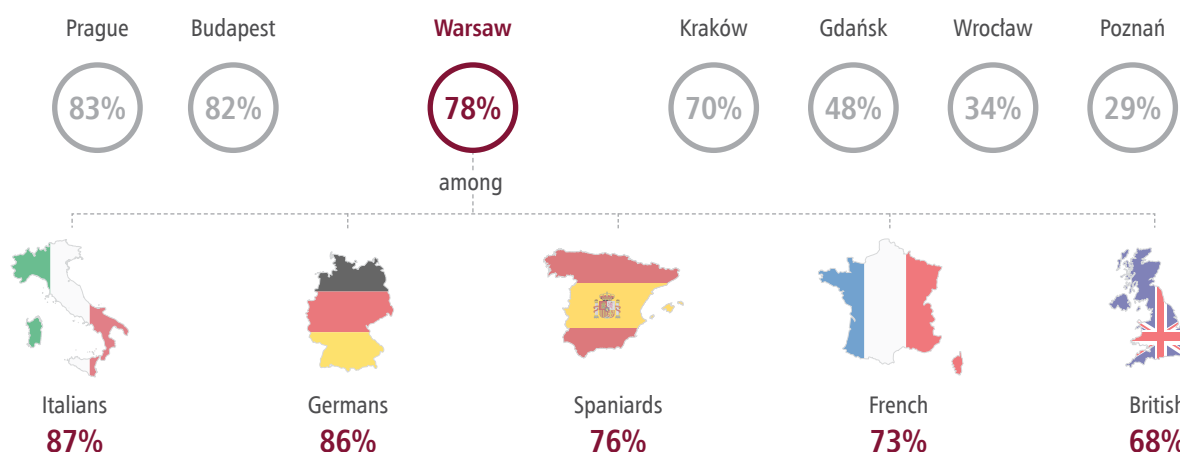


Warsaw's image among residents of selected European countries*

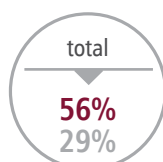
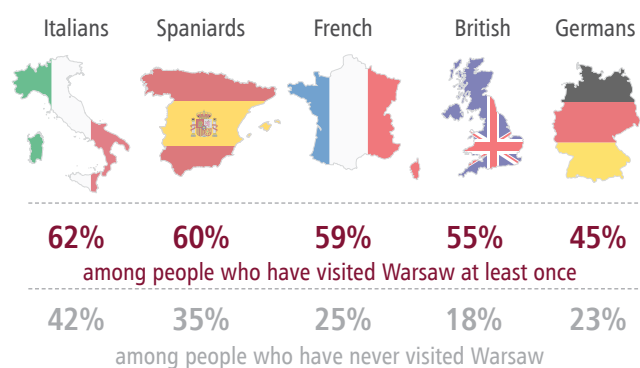
*France, Spain, Germany, United Kingdom, Italy

Source²

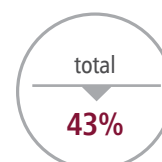
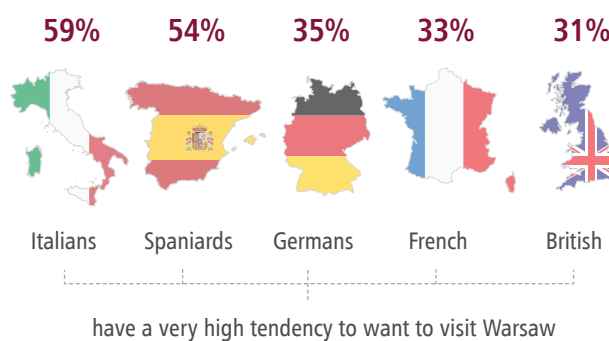
Knowledge of Warsaw compared with selected European cities



Positive impressions associated with Warsaw*



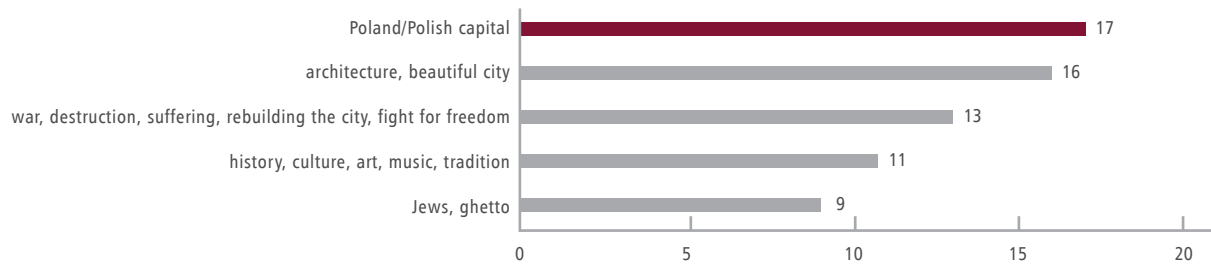
Tendency to want to visit Warsaw*



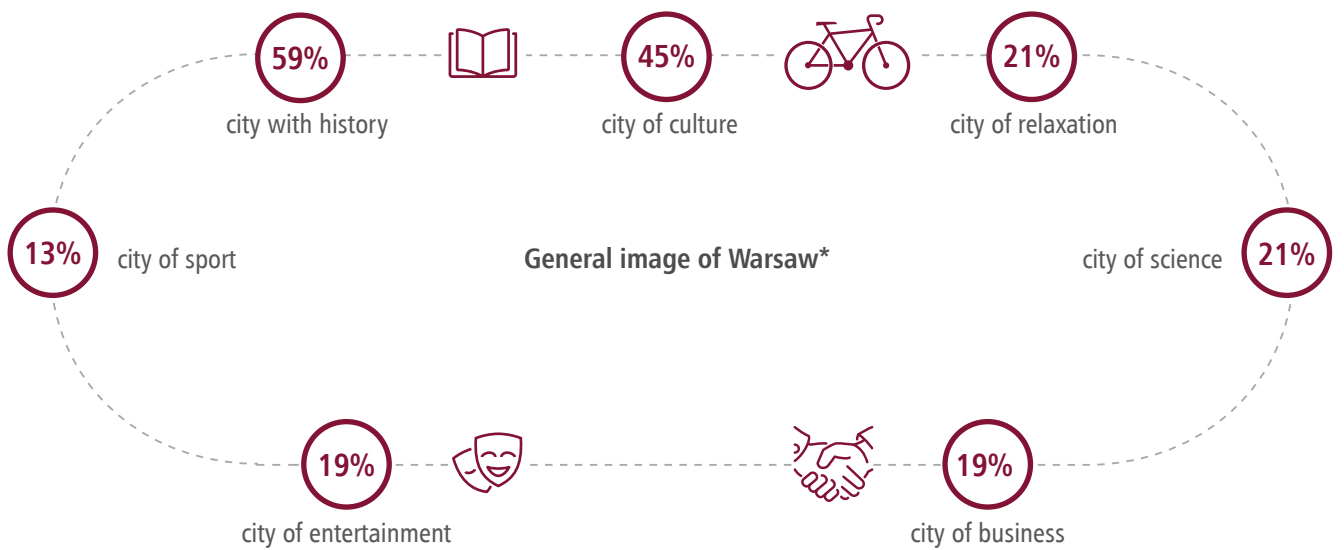
*among people who have at least heard of Warsaw

*among people who have at least heard of Warsaw

Selected first associations with Warsaw (%)*

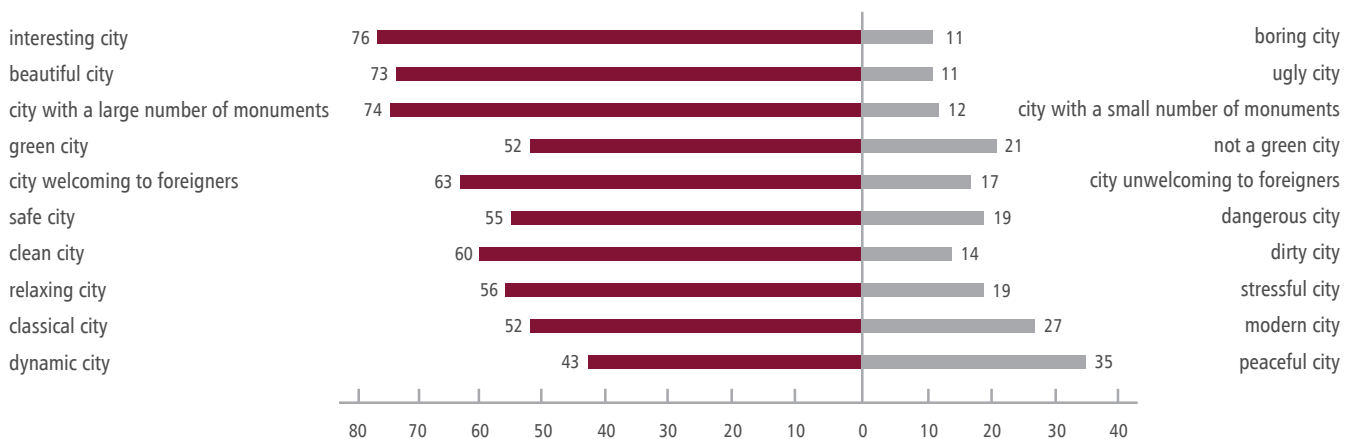


*among people who have at least heard of Warsaw



*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 (%)*

Old Town



total

45%

River Vistula



total

39%

Royal Castle



total

34%

National Museum



total

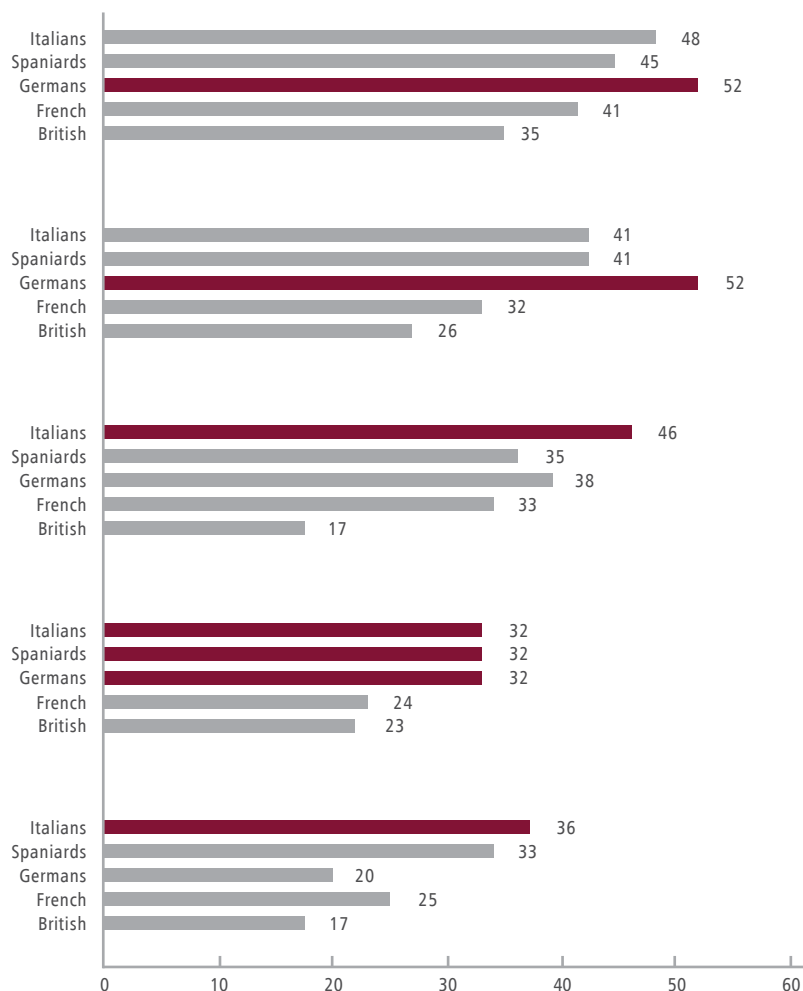
29%

POLIN Museum
of the History
of Polish Jews



total

27%



*among people who have at least heard of Warsaw



75%

of residents* of selected European countries know of Fryderyk Chopin,

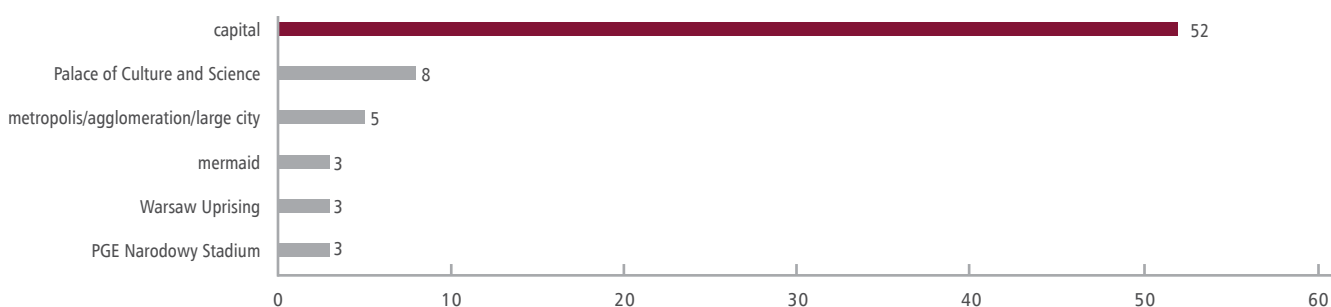
43%

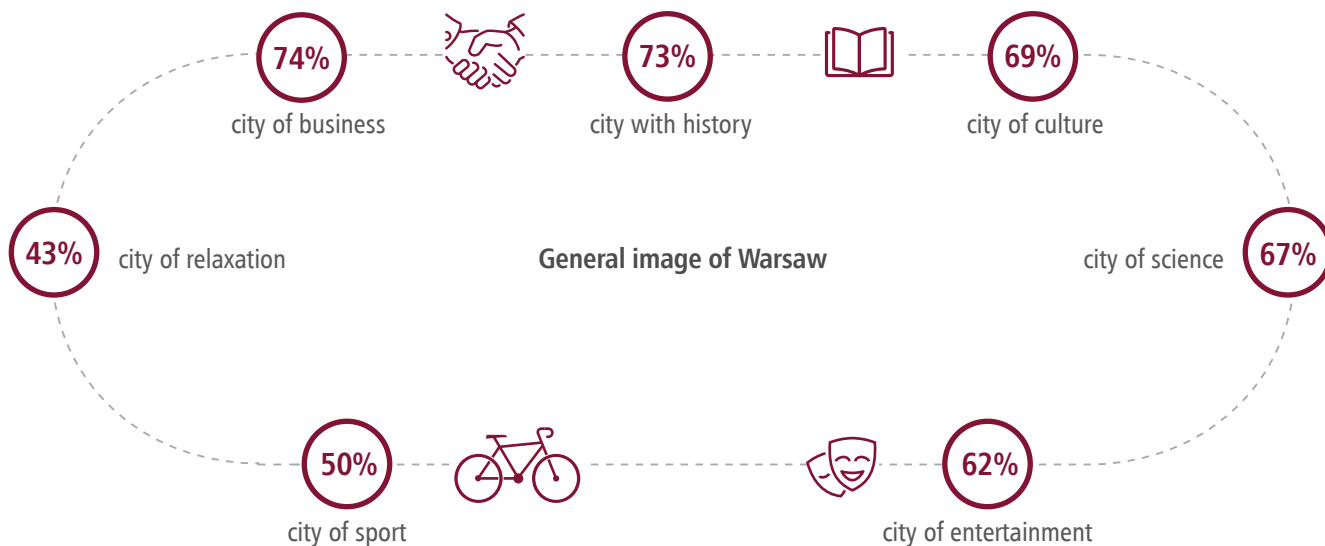
of them associate him with Warsaw (nearly 2/3 of Italians, but only 1/3 of British and Germans)

*among people who have at least heard of Warsaw

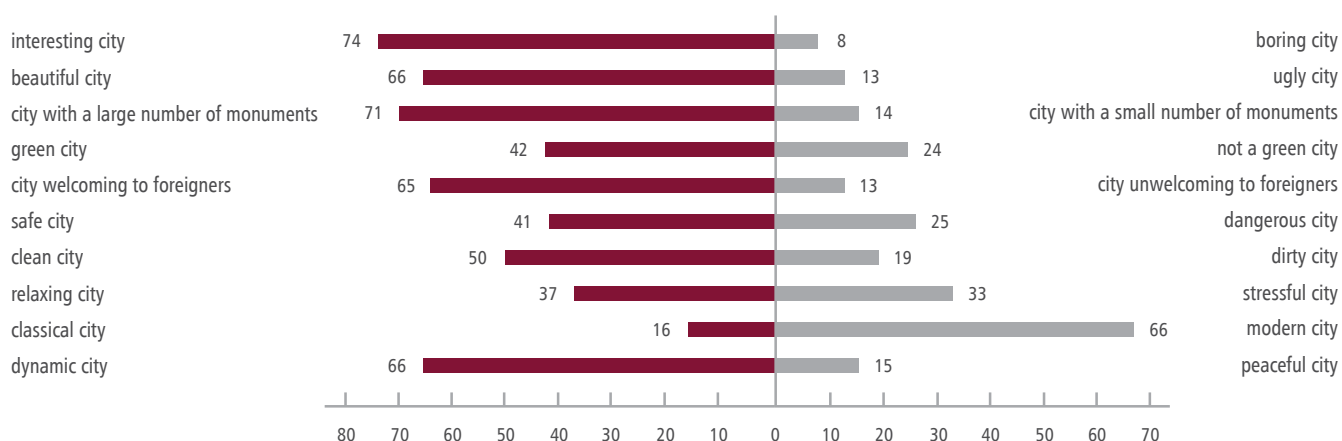
Warsaw's image among Polish people³

Selected first associations with Warsaw (%)

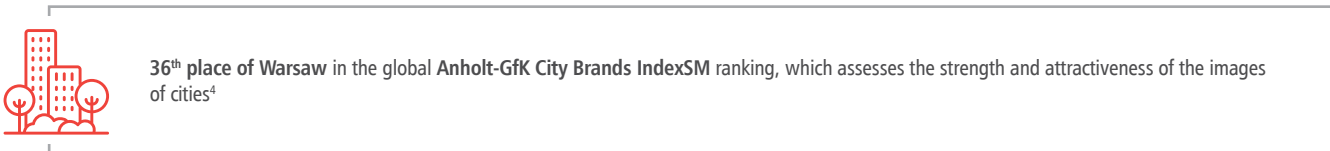
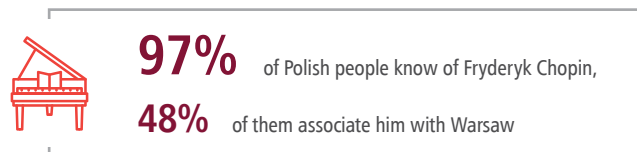


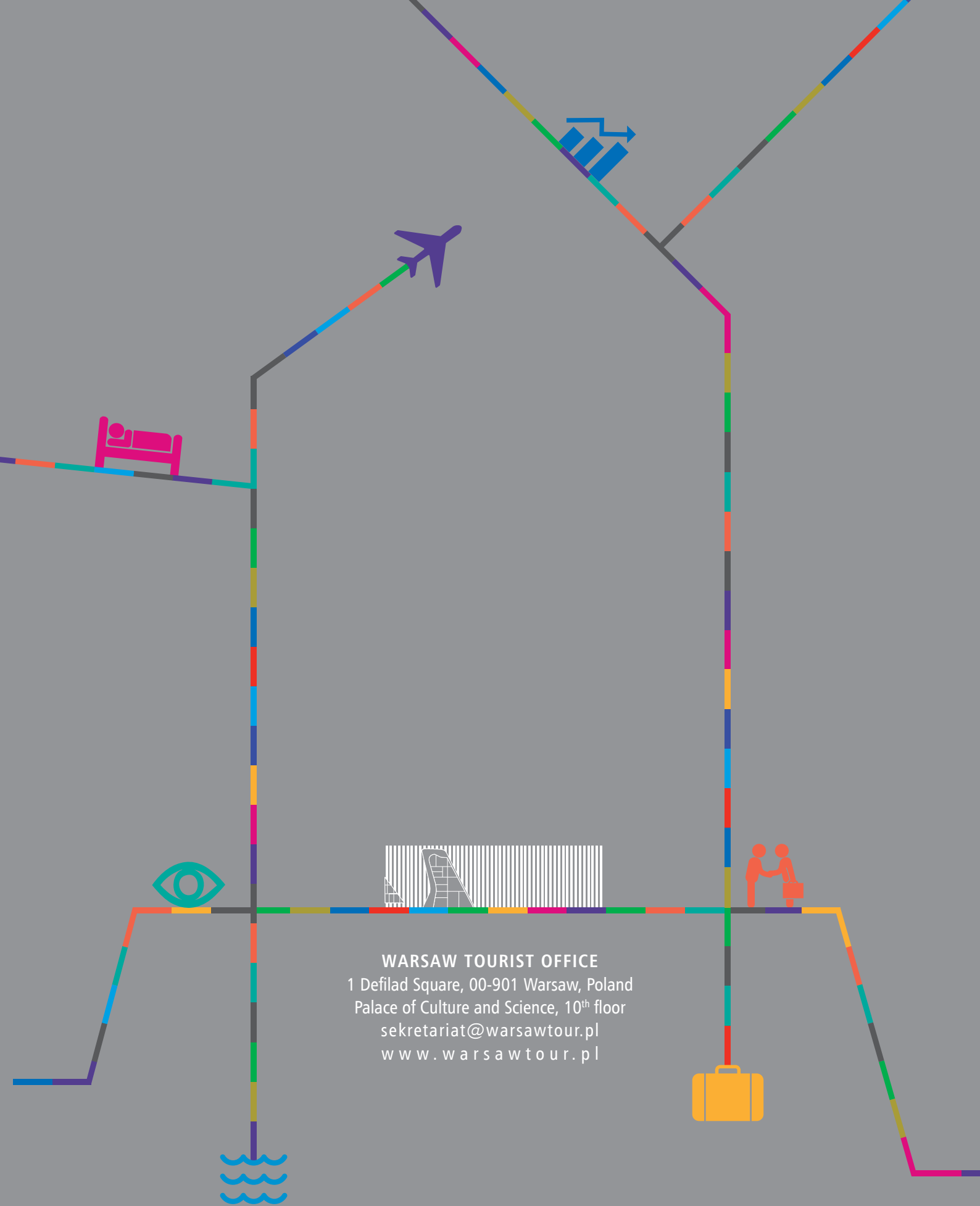


Warsaw characteristics (%)



Most recognisable places and monuments associated with Warsaw (%)





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