



# TOURISM IN WARSAW

REPORT 2019

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**Is it a city for residents or for tourists?** Every city with increasing numbers of guests from abroad faces this same dilemma. This growing number of visitors can only lead to a re-think of who the city should serve, how to shape its image, and who should be able to use its resources and spaces.

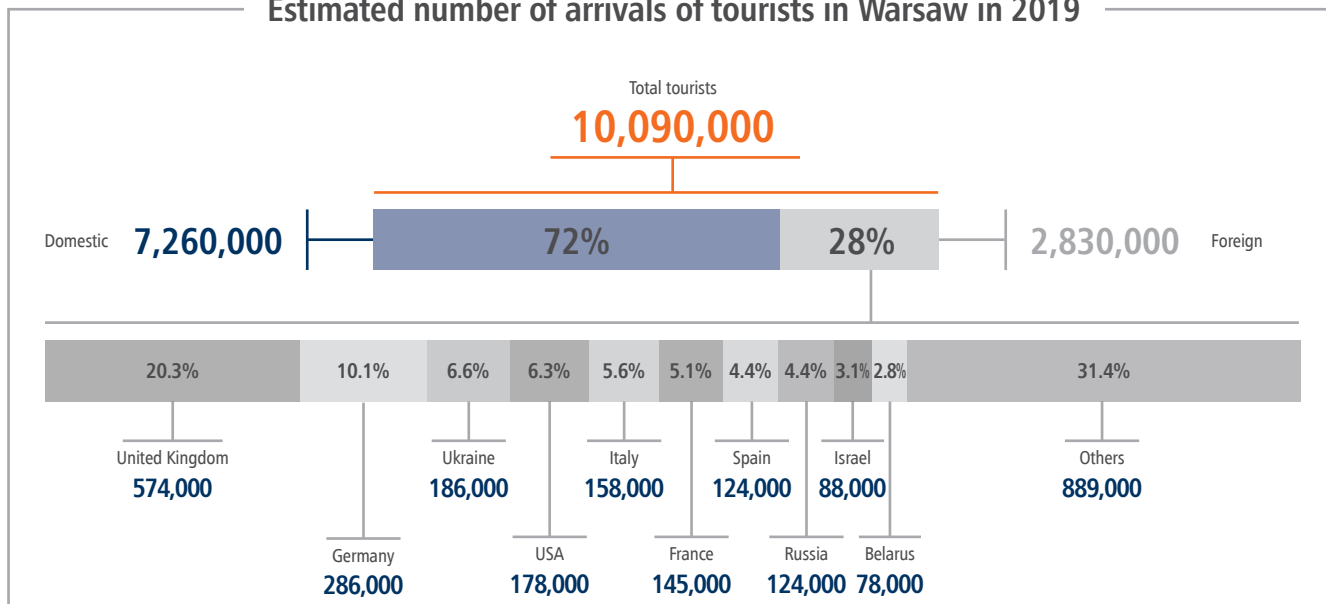
In Warsaw, the answers to these questions are being looked for not only amongst urban planners, tourism experts or officials, but above all residents. This gives a deeper understanding of how tourists are perceived and in what direction development lies so that the capital can remain a **friendly place both for its guests and for residents of Warsaw.**

Tourists increasingly often do not want to limit themselves to visiting the most popular attractions, but they also want **to immerse themselves in the city and feel like a local resident**, if only for a while. A visit to an antique shop in the Praga district, a short rest lying on the grass in the park, a conversation with an elderly stranger about his past during the Warsaw Uprising, or an intimate concert in the Jazdów community make it possible for tourists **to get to know the varied yet authentic sides of Warsaw.** When tourists leave the capital, it is not only with knowledge learned, improved business relations and a handful of souvenirs, but also, and perhaps most importantly, with emotions that will live with them for years to come.

Residents of Warsaw understand this perfectly and have been able to create a uniquely friendly atmosphere which is both urban and local. Tourists are an integral part of this and are more than welcome in Warsaw. If we combine this with better accommodation as well as improved gastronomy and retail, it is not surprising that year on year those visiting Warsaw from near and far **have an increasingly positive opinion about the city as a tourist location.**

So is it a city for residents or tourists? The fifth "Tourism in Warsaw" report goes to show that it is possible to cater to the needs of both groups.

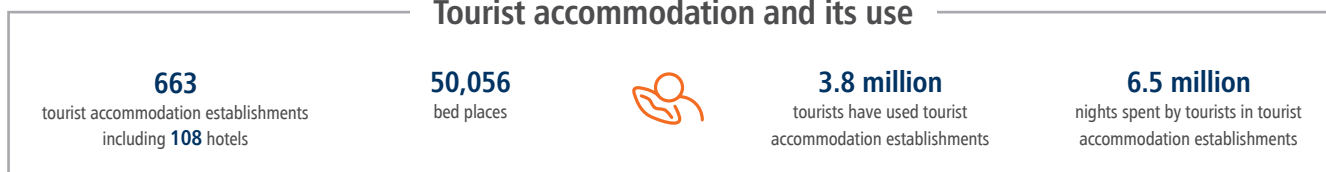
## Estimated number of arrivals of tourists in Warsaw in 2019



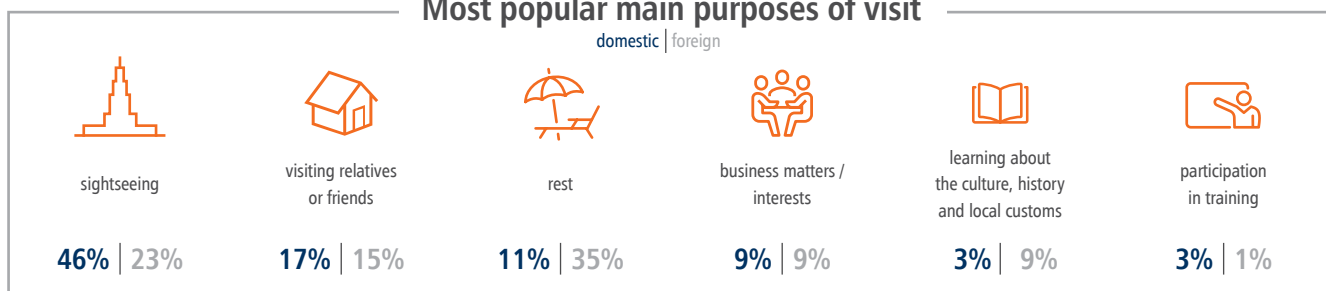
## Means of transport used by tourists coming directly to Warsaw



## Tourist accommodation and its use



## Most popular main purposes of visit



## The biggest attractions according to tourists



★ **9.11**

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



**3.8 days**

average length of stay in Warsaw

↻ **9.29**

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



**9.34**

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



**EUR 2.2 billion**

amount spent by foreigners in Warsaw

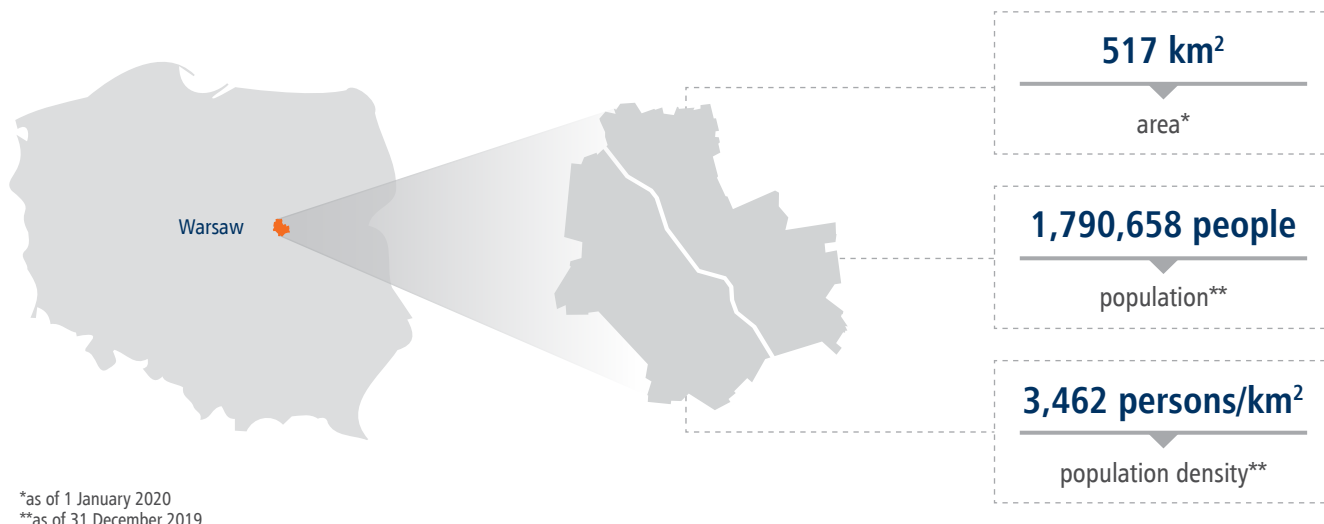


**EUR 568**

average amount spent by foreigners per person

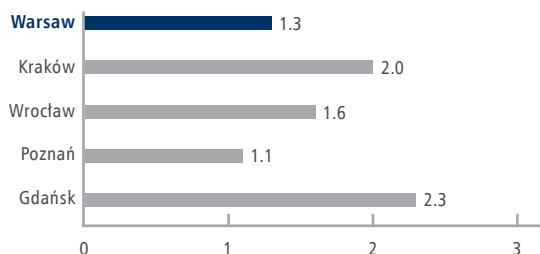


### Basic data<sup>1</sup>

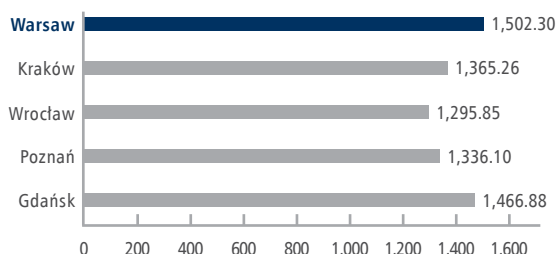


### Warsaw economy compared to other selected cities in Poland<sup>2</sup>

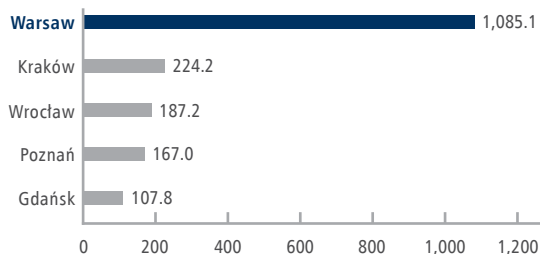
#### Registered unemployment rate at the end of December 2019 (%)



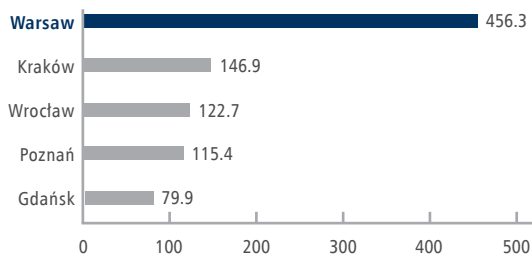
#### Average monthly gross wages and salaries in enterprise sector in January-December 2019 (EUR)



#### Average paid employment in enterprise sector in January-December 2019 (thousands)



#### Number of entities of the national economy in the REGON register at the end of December 2019 (thousands)



**Fitch Ratings** confirmed Warsaw's international long-term rating at "A-" with a stable outlook. This is the highest achievable rating, equal to that of Poland.<sup>3</sup>

## Warsaw in ranking tables

### fDi Polish Cities of the Future 2019/20<sup>4</sup>

Ranking of most attractive Polish cities for future inward investment

**1<sup>st</sup> place**

[ 1<sup>st</sup> place ]

in the 'economic potential' category

[ 1<sup>st</sup> place ]

in the 'business friendliness' category

[ 1<sup>st</sup> place ]

in the 'human capital and lifestyle' category

[ 1<sup>st</sup> place ]

in the 'connectivity' category

### Tholons Services Globalization Index™ 2019<sup>7, 8</sup>

World ranking of best localisations for business services centres

"Tholons Services Globalization City Index"

**21<sup>st</sup> place**

### The Global Financial Centres Index 26<sup>9</sup>

Ranking of global financial centres

**64<sup>th</sup> place**

[ 4<sup>th</sup> place ]

among cities in Eastern Europe and Central Asia

### fDi European Cities and Regions of the Future 2018/19<sup>5</sup>

Ranking of most attractive European locations for future inward investment

"European Cities of the Future 2018/19"

**11<sup>th</sup> place**

"Major European Cities of the Future 2018/19"

**7<sup>th</sup> place**

[ 3<sup>rd</sup> place ]

in the 'business friendliness' category

[ 8<sup>th</sup> place ]

in the 'FDI strategy' category

[ 9<sup>th</sup> place ]

in the 'cost effectiveness' category

"Eastern European Cities of the Future 2018/19"

**2<sup>nd</sup> place**

### Emerging Trends in Real Estate® Europe 2019<sup>10</sup>

Forecasts and trends on the European real estate market

**21<sup>st</sup> place**

in terms of investment and development trends

### Main Streets Across the World 2019<sup>11</sup>

Worldwide league table of the most expensive retail locations from selected countries in terms of rent

**37<sup>th</sup> place**

Nowy Świat Street

### A.T. Kearney 2019 Global Cities Index<sup>6</sup>

World ranking of global cities

**55<sup>th</sup> place**

### Europolis Cities for the Youth League Table<sup>12</sup>

League table of Polish cities most attractive to young residents

**1<sup>st</sup> place**

## Office and retail space in Warsaw<sup>13</sup>

<b>5.59 million</b> m <sup>2</sup>	<b>162,200</b> m <sup>2</sup>	<b>878,000</b> m <sup>2</sup>	<b>24</b> EUR/m <sup>2</sup> /month	<b>13.5 - 15</b> EUR/m <sup>2</sup> /month
modern office space at the end of 2019	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

## Modern office space in Warsaw compared to other selected cities in Poland at the end of 2019<sup>14</sup>

<b>Warsaw</b>	<b>5,587,900 m<sup>2</sup></b>
Kraków	1,416,700 m <sup>2</sup>
Wrocław	1,188,400 m <sup>2</sup>
Tricity	838,500 m <sup>2</sup>
Poznań	564,800 m <sup>2</sup>
Katowice	528,300 m <sup>2</sup>
Łódź	528,300 m <sup>2</sup>
Lublin	191,200 m <sup>2</sup>
Szczecin	180,800 m <sup>2</sup>



At the end of 2019, **office space under construction amounted to 780,000 m<sup>2</sup>**. Approximately 90% of investments are located in central locations. By 2021, the panorama of Warsaw will include 8 new skyscrapers, including Varso (310 m), which will become the highest skyscraper in the EU; Warsaw Unit (202 m), whose lower floors will be covered with so-called dragon skin, a flowing façade that moves with the wind; and Skyliner (195 m) with a two-storey bar at a height of 165 m offering a panoramic view of Warsaw.<sup>13, 15, 16, 17</sup>



Over **1.7 million m<sup>2</sup> of shopping centre space** concentrated in 52 centres within the Warsaw agglomeration in 2019. Galeria Młociny was delivered and became the second largest shopping centre after Westfield Arkadia.<sup>18, 19</sup>



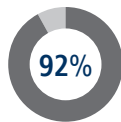
## Quality of life in Warsaw



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



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



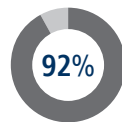
of residents have a **positive opinion of safety** in the city



of residents have a **positive opinion of the public transport**



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



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

Source: 20



The European Commission awarded Warsaw **the title of Access City**. The competition awards European cities that provide residents with equal access to resources and urban spaces regardless of age, mobility or skills.<sup>21</sup>



Warsaw is ranked **10<sup>th</sup> in the world** in terms of English language skills among city residents. The capital was ranked “very high” in terms of fluency in the EF English Proficiency Index 2019.<sup>22</sup>



93% of Polish students who are not from Warsaw and attend one of Warsaw's universities as well as 89% of foreigners working in Warsaw see the capital as a **suitable place for career development**.<sup>23</sup>



Inhabitants of the Warsaw capital region\* are the **best educated in the European Union**. 74% of 30-34 year olds and 57% of 25-64 year olds have a higher education.<sup>24</sup>

\*NUTS 2 region including Warsaw and its 9 adjacent counties

75%

of residents believe the development of tourism in Warsaw has a positive impact on their life

64%

of residents believe that Warsaw is not crowded with tourists

The attitude of Varsovians to the development of tourism

67%

of Varsovians believe their everyday life is not disturbed by tourists

0%

of Varsovians who live in the vicinity of flats or houses that are rented out to tourists experience daily negative consequences of this

Source: 25



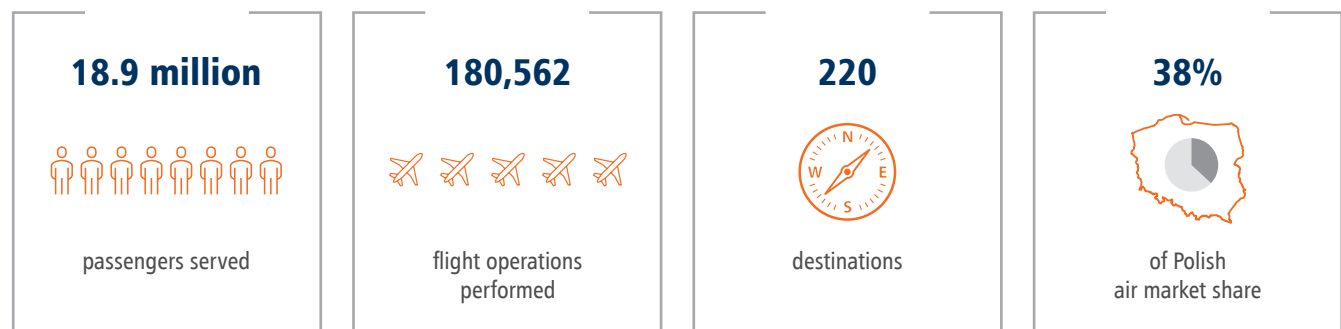
## Air

### Approximate direct flight times to Warsaw from selected cities



Source: 1, 2, 3

### Warsaw Chopin Airport



Source: 4, 5

Warsaw  
Chopin Airport



**approx. 10 km**

Warsaw  
centre



**30 minutes**

bus



**25 minutes**

Rapid Urban Railway



**20 minutes**

car/taxi

Source: 6



Over 17 million passengers made use of Warsaw Chopin Airport for international travel. The **most popular regular destinations** were London, Paris, Kiev, Frankfurt and Amsterdam.<sup>7</sup>



LOT Polish Airlines has opened up 7 new regular flights from Warsaw Chopin Airport, including **3 long-haul flights** to Miami (USA), New Delhi (India) and Colombo (Sri Lanka).<sup>7</sup>



For its **85<sup>th</sup> birthday** Warsaw Chopin Airport hosted an exhibition of unique photographs in the main terminal showing the rich history of the capital's airport. Some of the photographs went on show for the first time.<sup>8</sup>



Warsaw Chopin Airport has prepared a **mobile app** to help get around the terminal. It allows passengers to scan their boarding passes, get flight information and details about the check-in counter and gate. The app also contains a detailed map of the airport showing all shops as well as all the latest Warsaw airport information.<sup>9</sup>

## Warsaw Modlin Airport

**3.1 million**



passengers served

**21,050**



flight operations performed

**60**



destinations

**6%**



of Polish air market share

Source: 5, 10

Warsaw Modlin Airport



**approx. 40 km**

Warsaw centre



**55 minutes**

bus



**45 minutes**

car/taxi

Source: 6, 11

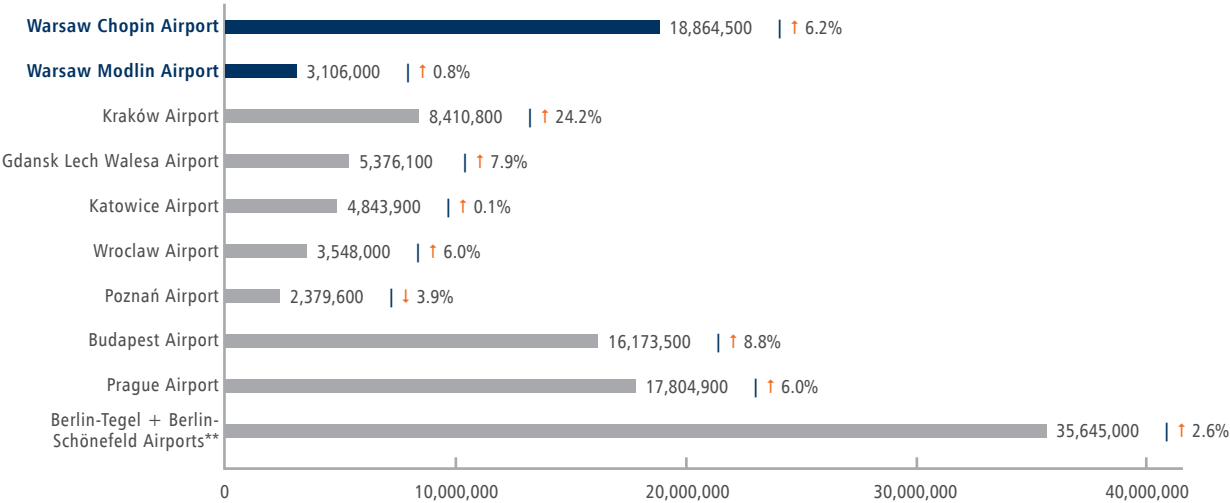


Approximately 92,000 passengers have made use of newly launched **all-season charter flights**. Flights to 8 holiday destinations (including Greece, Spain, Bulgaria and Turkey) were operated by 4 leading Polish tour operators.<sup>12</sup>



Warsaw Modlin Airport is the first Polish regional airport equipped with **eGates**. Now, passport control of one medium-range plane takes only about 12 minutes.<sup>12</sup>

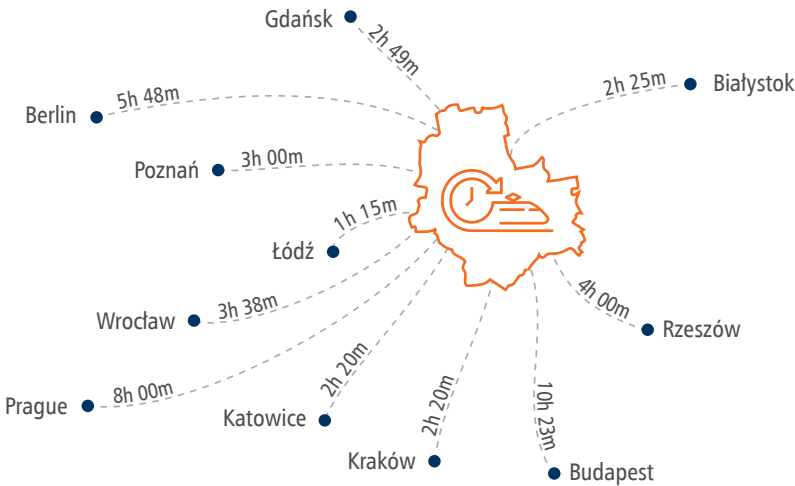
Warsaw Chopin Airport and Warsaw Modlin Airport in comparison to other selected airports – passengers served (number\* and percentage changes in comparison to 2018)<sup>13</sup>



\*data rounded up to the nearest hundred  
\*\*Berlin does not have a main airport

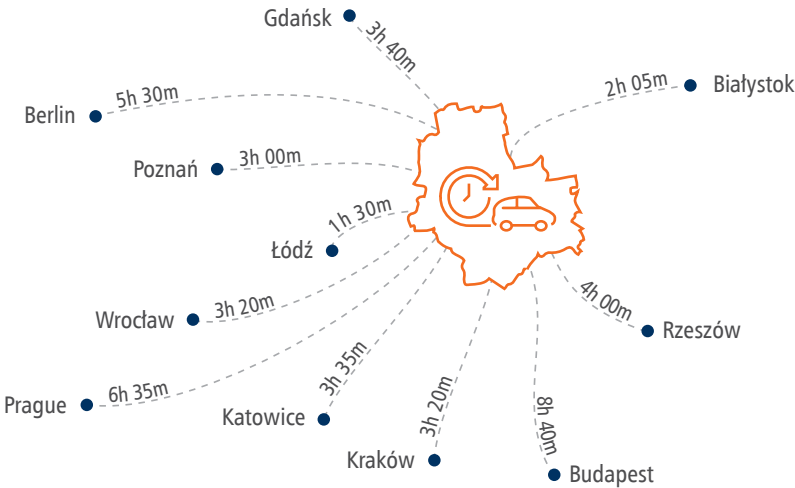
Rail<sup>14</sup>

Direct travel time to Warsaw from selected cities



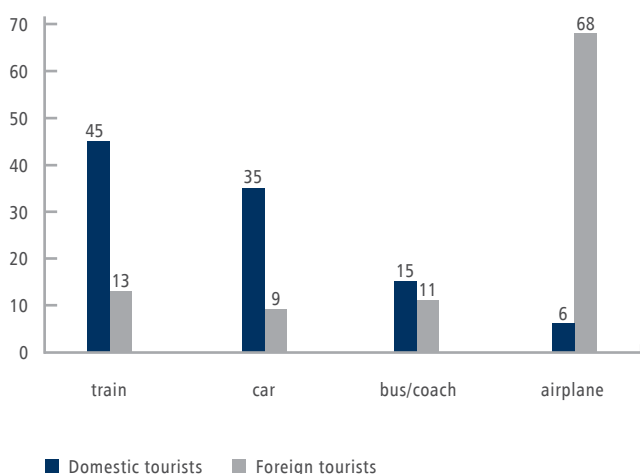
Road<sup>6</sup>

Approximate travel time to Warsaw from selected cities

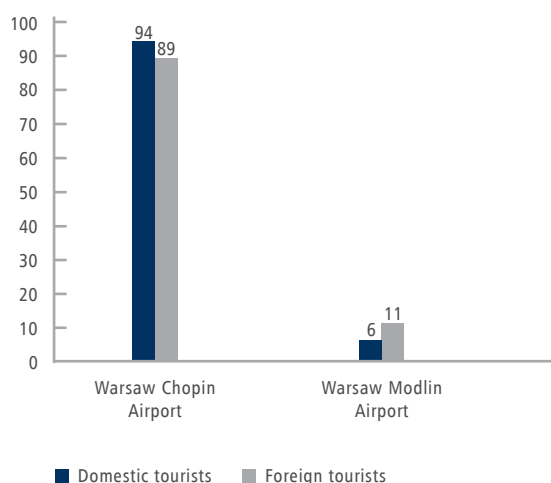


## Means of transport used by tourists coming to Warsaw<sup>15</sup>

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



Airports of arrival to Warsaw (%)



## City transport



Over **1.2 billion** passengers used **public transport**

↑ 18 million in comparison to 2018

**50%**

of people travelled by **bus**

A contract has been signed for the purchase of **130 zero-emission vehicles**, one of the largest contracts for electric buses in Europe

**25%**

of people travelled by **tram**

**311** of the 420 trams are **low-floor**, for people with disabilities

**20%**

of people travelled by **metro**

**3 new stations** have opened on the second metro line in the Praga-Północ and Targówek districts, with the construction of 3 more in the Wola district near completion

**5%**

of people travelled by **rail**

Source: 16, 17



Nearly **6 million bikes** were rented under the **Warsaw Public Bike Veturilo** system

There were **5,700 bicycles** for residents and tourists, including **60** children's bicycles, **45** tandem bikes and **110** electric bikes available at **390** stations

The most popular station was located beside the **Copernicus Science Centre**

Most bikes were rented **in April and June**

Bikes were most often rented between **16:00 and 18:00**

Veturilo makes up **7%** of bicycle traffic in Warsaw

Source: 18



## Accommodation establishments\*

\*based on data of the Warsaw Tourist Office, City of Warsaw and Ministry of Sport and Tourism



**663**  
tourist accommodation  
establishments

↑ 63  
in comparison to 2018



**50,056**  
bed places\*

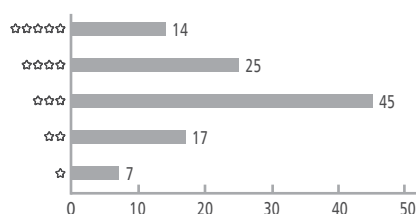
↑ 4,841  
in comparison to 2018

\*including 100 tent and 80 caravan pitches

Source: 1

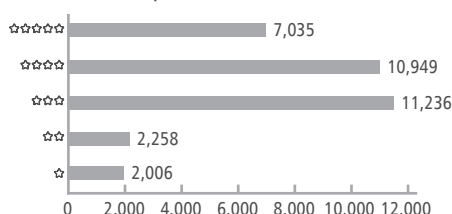
## Hotels<sup>1</sup>

### Number of establishments



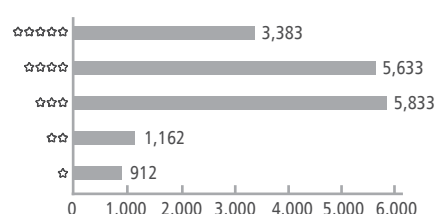
total  
**108** ↑ 9  
in comparison to 2018

### Number of bed places



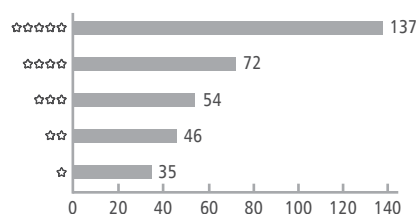
total  
**33,484** ↑ 3,821  
in comparison to 2018

### Number of rooms



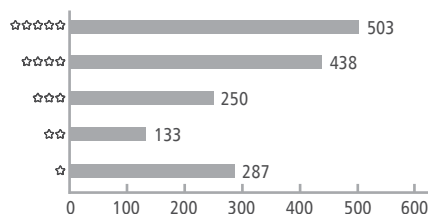
total  
**16,923** ↑ 1,818  
in comparison to 2018

### Average price of a double room (EUR)\*



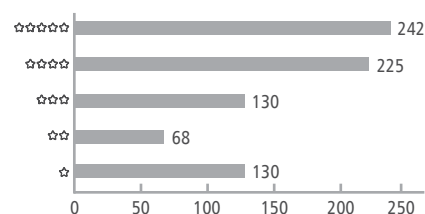
average  
**68** ↓ 1  
in comparison to 2018

### Average number of bed places in hotel



average  
**322** ↑ 4  
in comparison to 2018

### Average number of rooms in hotel

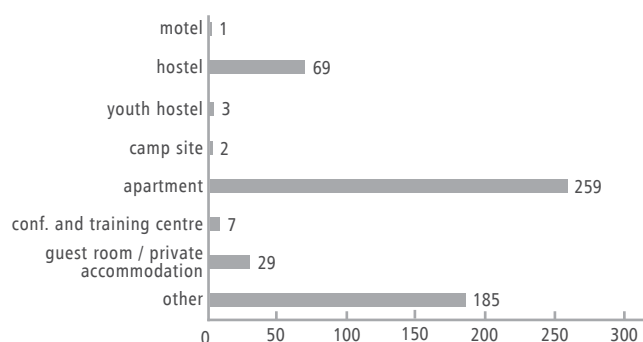


average  
**159** ↔ 0  
in comparison to 2018

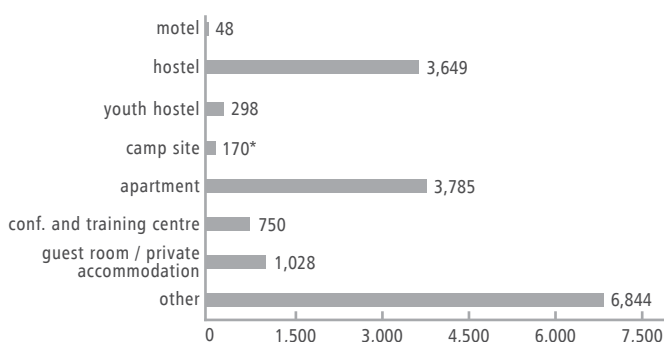
\*average calculated on the basis of the lowest prices for a double room in hotels of a given category

## Other tourist accommodation establishments<sup>1</sup>

### Number of establishments



### Number of bed places



\*including 100 tent and 80 caravan pitches

## Use of tourist accommodation establishments\*

\*data of the Central Statistical Office 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 rooms<sup>2</sup>



**3,807,509**

tourists have used accommodation establishments



4.4%  
in comparison to 2018

**1,358,950**

foreign tourists have used accommodation establishments



0.4%  
in comparison to 2018

**36%**

of all tourists making use of accommodation establishments



**6,548,363**

nights spent by tourists in accommodation establishments



2.6%  
in comparison to 2018

**2,582,963**

nights spent by foreign tourists in accommodation establishments



1.9%  
in comparison to 2018

**39%**

of all nights spent by tourists in Warsaw



**3,707,928**

rooms rented by tourists in hotels

**70.3%**

occupancy in hotels



1.6 pp  
in comparison to 2018

highest occupancy in September

**79.0%**

lowest occupancy in December

**58.6%**

**5.8%**  
★ hotels

**8.4%**  
★★ hotels

**28.0%**  
★★★ hotels

**22.2%**  
★★★★ hotels

**34.4%**  
★★★★★ hotels

rooms rented

**1.7**

nights

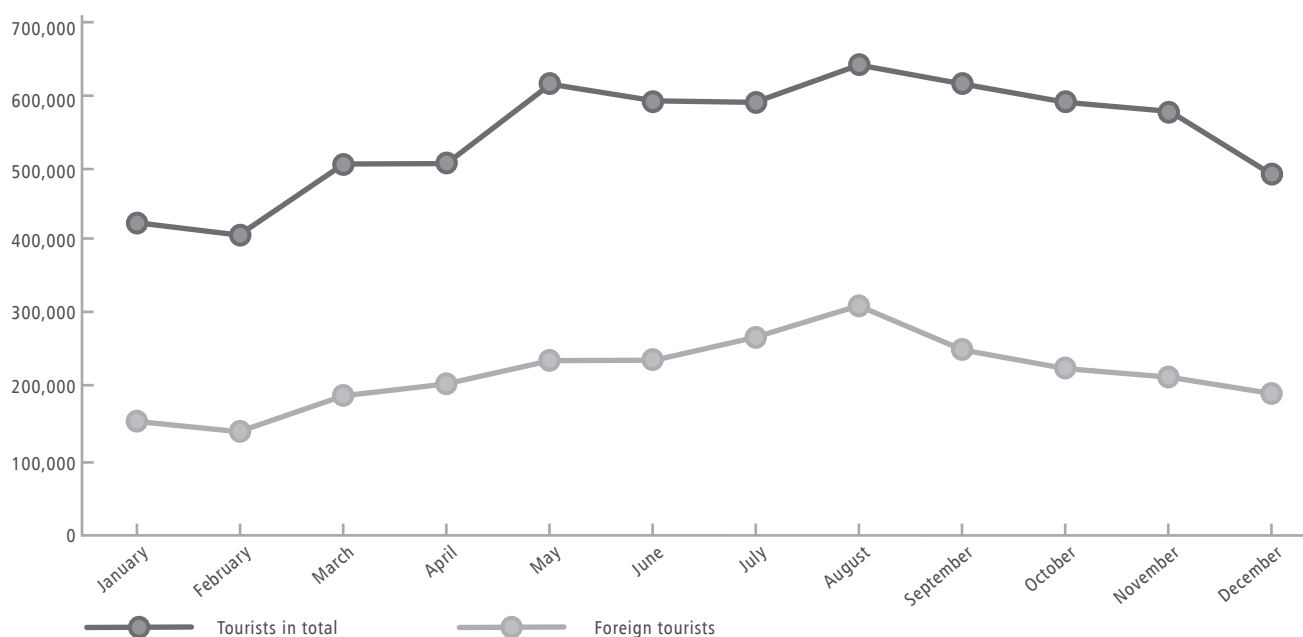
average duration of stay by tourists in accommodation establishments (1.9 nights for foreign tourists)

**1<sup>st</sup>**

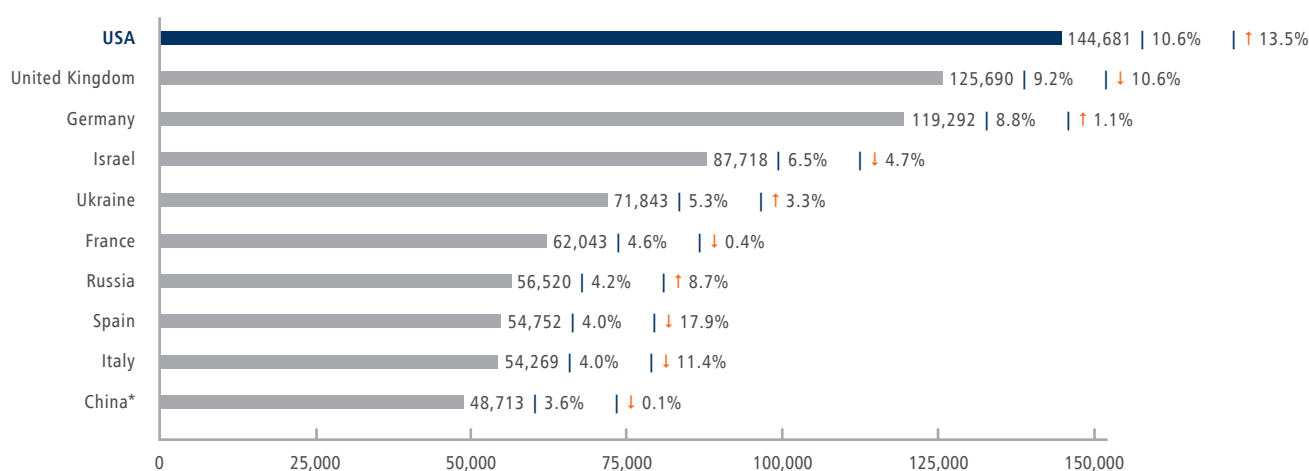
place

to central Śródmieście district in terms of number of nights spent (2.7 million / 41% of nights spent in Warsaw); followed by Włochy district (0.9 million / 13%) and Wola district (0.7 million / 10%)

## Nights spent by tourists by months<sup>2</sup>

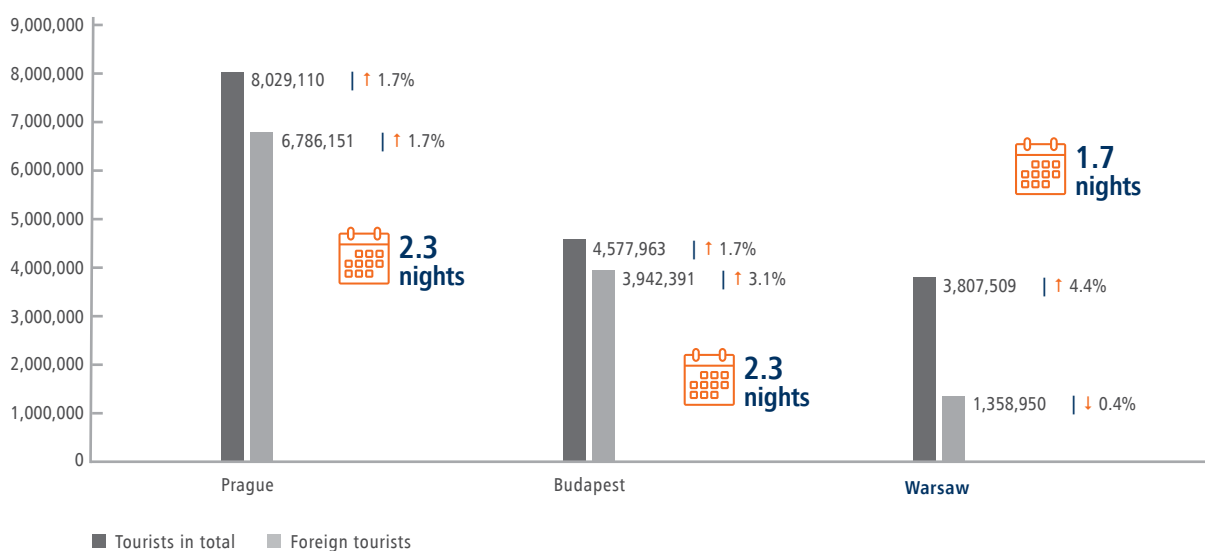


## Foreign tourists making use of accommodation establishments – top 10 by country of residence (number, share and percentage change in comparison to 2018)<sup>2</sup>



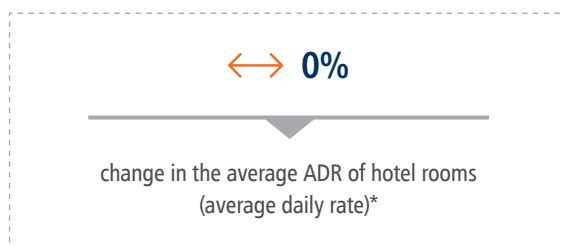
\*not including Taiwan

## Tourists making use of accommodation establishments in selected cities (number, percentage change in comparison to 2018 and average length of stay)<sup>4</sup>



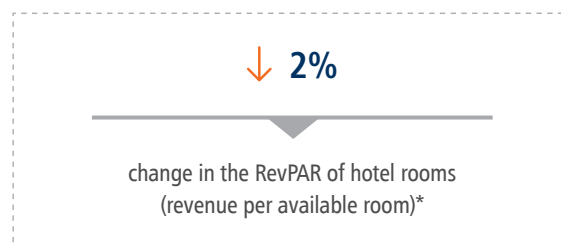


## Selected tourist accommodation information



\*data for first six months in comparison to analogical period in 2018

Source: 5, 6



94%

of tourists visiting Warsaw spend  
the night within the city boundaries<sup>7</sup>

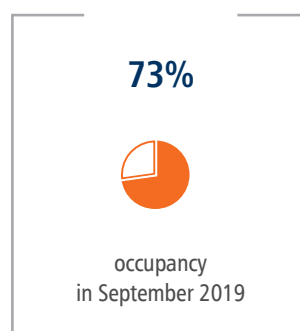


of tourists have a **positive opinion of tourist accommodation\***

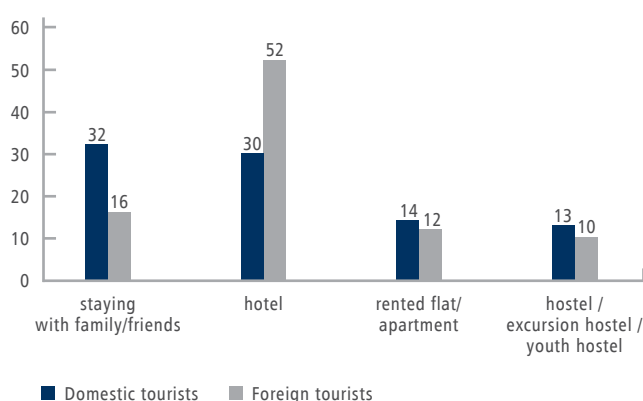
\*people who have used this type of service

Source: 7

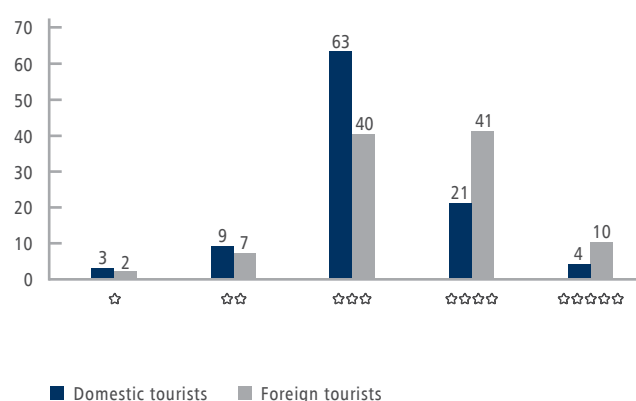
## Rental of accommodation establishments by Airbnb and Vrbo<sup>8</sup>



## Main types of accommodation used by tourists (%)<sup>7</sup>



## Standard of hotels used by tourists (%)<sup>7</sup>



Hotel Bristol is the **first Polish hotel** to be included in the TRAVEL + LEISURE league table, coming 4<sup>th</sup> in the TOP 10 Hotels in Europe and 81<sup>st</sup> in the TOP 100 Hotels in the World. Readers were impressed with its beautiful interiors and elegant art déco touches dating from the early 20<sup>th</sup> century, the charm of the cafés and restaurants and the prime location on Warsaw's Royal Route.<sup>9</sup>



In 2019, **five major hotels were opened**: Moxy Warsaw Praga in the revitalised complex of the former "Koneser" Warsaw Vodka Distillery, Four Points by Sheraton Warsaw Mokotów with modern vintage interiors, Vienna House Mokotów Warsaw in the office district of Służewiec, Motel One Warsaw-Chopin in which the common areas have been inspired by the famous composer, and located in the very centre of PURO Warszawa Centrum with a terrace-view of the roofs of Warsaw's tenements and the Palace of Culture and Science.



## Tourist attractions – visitors\* and selected events



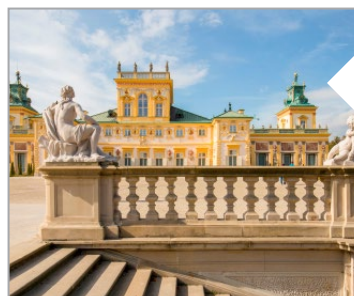
**The Royal  
Łazienki Museum  
in Warsaw<sup>1</sup>**



**4,942,000**

Rembrandt's "Landscape with the Good Samaritan", a masterpiece of landscape art was on display in the Palace on the Isle. It is one of only three of the master's works in Polish collections and its presentation is thanks to cooperation with the National Museum in Kraków.<sup>4</sup>

Two historic buildings, the White Pavilion and the Water Tower, have been restored to their former splendour. The surrounding garden has also been revitalised. Visitors can now admire exhibitions and take part in educational and cultural events.<sup>2,3</sup>



**Museum  
of King Jan III's Palace  
at Wilanów<sup>5</sup>**



**3,116,000**

The Museum received the prestigious Europa Nostra Award 2019 for the "A Place at the Royal Table" educational project. The jury appreciated the original and accessible approach of the initiative, aimed at raising awareness about the culinary history of royal courts.<sup>6</sup>

The Museum opened an exhibition with one unique exhibit: the Cope of Kęty, a liturgical vestment made of oriental fabric acquired by King Jan III Sobieski during the famed 1683 Battle of Vienna.<sup>7</sup>



**National Museum  
in Warsaw<sup>8</sup>**



**289,000\*\***

After 75 years, "Interior of the Cathedral in Milan" which was looted after the Warsaw Uprising, has returned to the Museum. It was painted by Marcin Zaleski, the greatest Polish vedutist of the 19<sup>th</sup> century.<sup>9</sup>

More than 29,000 people over three weeks took in the special "Pablo Picasso" display, part of the "Treasures of the National Museum in Warsaw" series. Thirty pieces by the master which are in the Museum collection include pottery, graphic works and a drawing entitled "Polish Girl" which he produced during a visit to Wrocław.<sup>8,10</sup>



**The Royal Castle  
in Warsaw - Museum<sup>11</sup>**



**1,257,000**

The post-war reconstruction of the Castle is finally over. The pièce de résistance was the opening of the modernist Lower Garden. The granite terrace with fountains, a lawn, rows of landscaped shrubs and trees lining the paths have changed the Castle surroundings beyond recognition.<sup>12</sup>

On the 350<sup>th</sup> anniversary of the death of one of history's most outstanding painters, the Museum opened the "36 x Rembrandt" temporary exhibition. Visitors admired two paintings in the Royal Castle collection as well as 34 of his graphic works and drawings from Polish collections.<sup>13</sup>



**The Warsaw Rising  
Museum<sup>14</sup>**



**754,000**

The unique exhibition entitled "Reflection. I am like you, surely" opened. With the help of this interactive installation visitors were able to take part in an experiment, find and come face to face with photographs of Warsaw Uprising insurgents most similar-looking to them.<sup>15</sup>

The Museum received a unique gift: a Polish Red Cross flag sewn by a nurse of the insurgent hospital on the night of 28 September 1944. The flag accompanied the Polish delegation during talks with the Germans about the capitulation of the Warsaw Uprising.<sup>16</sup>



**POLIN  
Museum of the History  
of Polish Jews<sup>17</sup>**



**604,000**

"Images from Home" by Elżbieta Nadel, a unique testimony documenting the German occupation, has enriched the Museum's collection. Nadel's collection of drawings is a humorous look at one day in the life of a family in the Lwów Ghetto.<sup>18</sup>

The Museum was one of seven international institutions nominated for the prestigious Children in Museums Award 2019. The jury praised the Museum for the "In King Matt's Poland. The 100<sup>th</sup> Anniversary of Regaining Independence" telling the story of the difficulties of ruling the country.<sup>19, 20, 21</sup>



### The Fryderyk Chopin Museum in Warsaw<sup>22</sup>



98,000

The Museum acquired a George Sand letter in which she recounts her impressions of a trip to Mallorca with Chopin. The letter was auctioned off in Paris and was donated to the Museum courtesy of Marek Keller, an art dealer and collector.<sup>23</sup>

Nigh on 20,000 people saw the "Chopin – 200 Years of Portraits" exhibition at the Hyōgo Prefectural Museum of Art in Kobe, Japan. The main attraction included the composer's portraits and manuscripts from collections of, amongst others, the Fryderyk Chopin Museum.<sup>24</sup>



### Museum of Warsaw<sup>25</sup>



77,000\*\*

More than 1,600 pieces, including handmade jewellery and fine accessories, were included in the "ORNO Cooperative. Jewellery" temporary exhibition. This is the first large exhibition of the work of the renowned Warsaw art metalwork cooperative.<sup>26</sup>

The Museum housed the "No sky or earth in sight. Varsovians on September 1939" exhibition which showcased participants' accounts of defence of their city during WWII, sent in 1948 for the "Diary of a Varsovian" competition.<sup>27</sup>



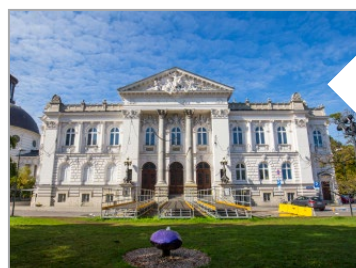
### Ujazdowski Castle Centre for Contemporary Art<sup>28</sup>



219,000

As part of the next edition of the Jazdów City Garden project, the "Dystopia" composition was installed in the park adjacent to the Castle. It is a water garden full of rich vegetation full but tainted with waste and rubbish in order to draw attention to the problem of water pollution.<sup>29</sup>

The Centre opened two temporary exhibitions under one title: "Plasticity of the Planet" as a response by the international artistic community to the irreversible changes in the ecosystem resulting from the activities of humankind.<sup>30</sup>



### Zachęta – National Gallery of Art<sup>31</sup>



132,000

The comprehensive exhibition entitled "Change the Setting. Polish Theatrical and Social Set Design of the 20<sup>th</sup> and 21<sup>st</sup> Centuries" included parts of plays and sections of set design from the most famous of performances, archival photographs and theatre posters.<sup>32</sup>

The Polish clothing brand Local Heroes has been working with Zachęta on creating a collection inspired by the gallery's works of art. The project designers wanted to inspire the audience in experiencing tangible art.<sup>33</sup>



### Copernicus Science Centre<sup>34</sup>



1,190,000

The 40 interactive exhibits making up the temporary exhibition of "Measure Yourself!" allowed visitors to see the capacity of their lungs, how fast their hearts beat, the strength at which they can flex their muscles and how fine-tuned their senses are.<sup>35</sup>

To celebrate the 50<sup>th</sup> anniversary of the Apollo 11 moon landing, a unique piece appeared in front of the Copernicus Science Centre Planetarium: a 7-metre-high floating silver globe, mapped from a NASA image of the moon.<sup>36</sup>



### PGE Narodowy Stadium<sup>37</sup>



1,853,000

Thousands of fans enjoyed the concerts of a host of international stars at PGE Narodowy. Legendary bands like Metallica and Bon Jovi, pop icon P!NK and Genesis frontman Phil Collins all played the Stadium.<sup>38</sup>

Smart Kids Planet opened at PGE Narodowy and is the first such interactive centre for the youngest learners in Poland, created as a form of *edutainment* combining education and entertainment.<sup>39</sup>



### Palace of Culture and Science in Warsaw<sup>40</sup>



714,000\*\*\*

One of the largest ceremonial rooms in the Palace, Starzyński Hall, has undergone a thorough renovation including work on the elaborate parquet floor using five types of wood, restored crystal chandeliers, renovated stuccowork and polished stucco.<sup>41</sup>

More than 5,000 people gathered outside the Palace square to watch a concert version of Giacomo Puccini's opera "Madama Butterfly" with Poland's most famous soprano Aleksandra Kurzak in the title role. It was the first outdoor performance of the piece in Warsaw.<sup>42</sup>



### City Zoological Garden in Warsaw<sup>43</sup>



836,000

Warsaw Zoo and a large crowd celebrated the 18<sup>th</sup> birthday of Leon the elephant. A cake made of vegetables and hay as well as various titbits and toys were waiting for the birthday boy. Leon also received a symbolic personal ID card from the Mayor of Warsaw.<sup>44</sup>

The Socorro doves born in Warsaw Zoo have returned to the Mexican island of Socorro, which they were endemic to before they became extinct. They were last seen in their natural environment over 40 years ago.<sup>45</sup>

\*approximate data or rounded up to the nearest thousand, includes both tourists and residents

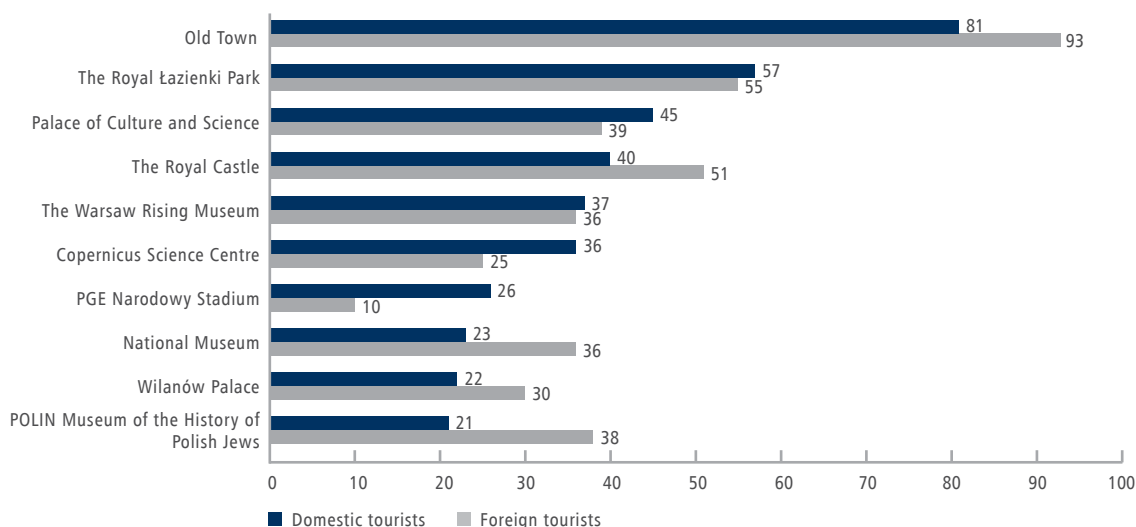
\*\*number of visitors to the headquarters

\*\*\*number of visitors to the viewing terrace on the 30<sup>th</sup> floor of the Palace



## Tourist attractions in numbers

### Main sights and attractions visited by tourists in Warsaw (%)\*



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

Source: 46



**The Wola Museum of Warsaw** has undergone a facelift and re-opened for visitors. The guiding principle of the Museum is to connect the history of Wola district with the present day and create an open and engaging meeting place.<sup>47</sup>



Another stretch of the **Vistula River boulevards** is now available for residents and tourists! Lovers of active recreation can make use of a street workout zone, and a skatepark. There are hammocks and a grassy slope for those looking to relax.<sup>48</sup>

### The biggest tourist attractions in Warsaw according to tourists\*



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

Source: 46

### Selected events – attendances\*



\*approximate data or rounded up to the nearest thousand, includes both tourists and residents

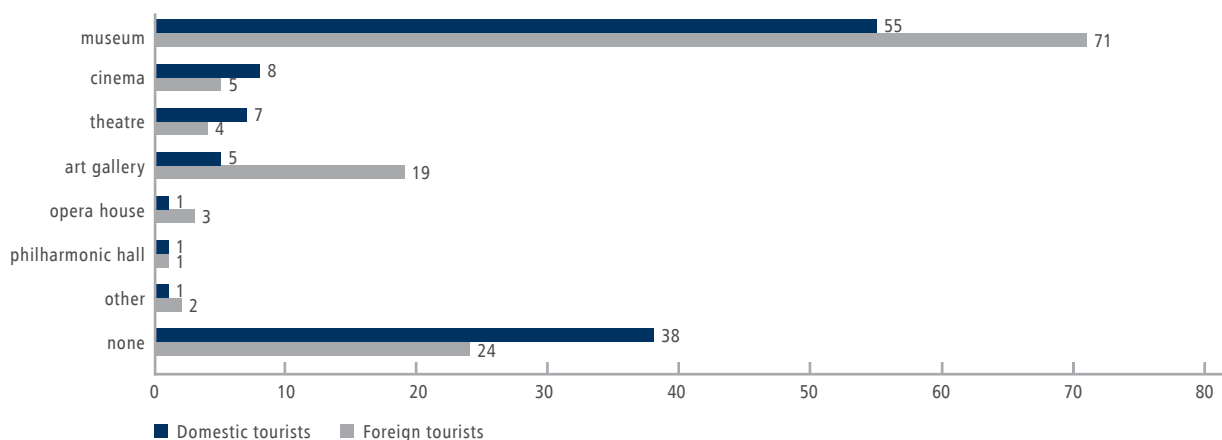
\*\*participants of the marathon and accompanying runs

Source: 34, 49, 50, 51, 52, 53



**10%** of tourists took part in an event such as a concert, festival, fair or sports event during their stay in Warsaw<sup>46</sup>

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



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

Source: 46

### Selected cultural institutions – attendances\*



\*approximate data or rounded up to the nearest thousand, includes both tourists and residents

Source: 54, 55, 56, 57



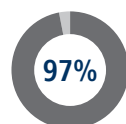
Two Warsaw restaurants: Atelier Amaro and Senses maintained their **Michelin Stars**. They are the only restaurants in Poland with this prestigious distinction. The Michelin Red Guide "Main Cities of Europe 2019" contains 27 restaurants from Warsaw.<sup>58</sup>



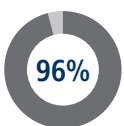
Warsaw included in an international group of cities **most welcoming of vegans**. The capital city came 6<sup>th</sup> in the Happy Cow website league table, which is helping create a global map of vegetarian cuisine. Warsaw prides itself on 50 completely-vegan restaurants.<sup>59</sup>



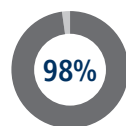
of tourists have a **positive opinion of the cultural attractions on offer\***



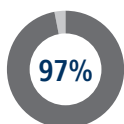
of tourists have a **positive opinion of the entertainment attractions on offer** (club, disco, pub)\*



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



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



of tourists have a **positive opinion of the gastronomy infrastructure\***



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

\*people who have used this type of service

Source: 46



Warsaw's tourist attractions do not only include packed museums, palaces and cultural events but also the local charm of its districts. The authenticity and variety of the many corners of the city draws in guests who want to see and feel how the residents of the city they visit really live.



### Jazdów Community – green enclave in the heart of the city

The picturesque wooden Finnish-style houses were built just after WWII to house the architects and engineers responsible for the reconstruction of the capital. The estate now consists of 27 listed buildings surrounded by greenery. Several of them are still inhabited while others are looked after by NGOs. Small concerts, film screenings, exhibitions, educational workshops and scientific seminars are held here, and one even houses an urban apiary.

Source: 1, 2, 3

### Gems of Warsaw street art

- There is a downtown tenement which is covered with a mural commemorating Polish rock legend Kora. The mural changes with the seasons thanks to a chestnut tree growing next to it.
- The "Warsaw East" mural by world-famous artist Sebastián Velasco adorns an old tenement in Praga-Północ district. It depicts a musician working as a bartender in one of Warsaw's night clubs.
- In the district of Żoliborz there is a mural of David Bowie, which references to the singer's famed visit to Warsaw.
- On a Mokotów tenement, a mechanical centaur with golden armour sits on top of a mechanical deer ready to shoot it with an arrow, the work of Italian artist Pixel Pancho.
- One of the largest murals can be found on a war-ravaged building in Wola, which stands on the edge of the former Warsaw Ghetto. It depicts a red balloon flying away, and the words "stone and what" in reference to the district's war-torn past.

Source: 4, 5, 6, 7, 8, 9





## Ząbkowska Street – centre of local life in Praga-Północ district

During the summer season, the street turns into an esplanade and stage for various social and cultural events as part of the Open Ząbkowska festival. A host of performances and artistic happenings take place. Mobile antique shops and stalls appear on the street where visitors can buy paintings, pottery and handicraft. In the courtyards and back alleys of Ząbkowska there are cinemas, theatres, poetry clubs and hosts of places where people can meet up. The small Praga shrines you can find there are decorated with flowers and colourful lamps. Most were built during WWII when residents had to pray in their backyards instead of in churches.

Source: 10, 11



## Charming neighbourhoods of Old Żoliborz

### 📍 Żoliborz Urzędniczy (Clerk's Żoliborz)

The most elegant part of the quarter is Wieniawskiego Street. Amongst the trees, white tenements covered with clay tiles line the street, typical of the suburban architecture of the 18<sup>th</sup> and 19<sup>th</sup> centuries. Each has its own garden. Niegolewskiego Street boasts the Brukowski Villa, a symbol of Polish avant-garde architecture.

### 📍 Żoliborz Dziennikarski (Journalist's Żoliborz)

The quarter is made up of avant-garde houses styled on German functionalism. They are characterised by flat roofs and smooth facades with modest brick details. Particularly noteworthy is the "Glass House" on Mickiewicza Street.

This 4-storey building, designed in line with Le Corbusier's modernist style, was a symbol of luxury and is the 1930s equivalent of today's modern apartments.

### 📍 Żoliborz Oficerski (Officer's Żoliborz)

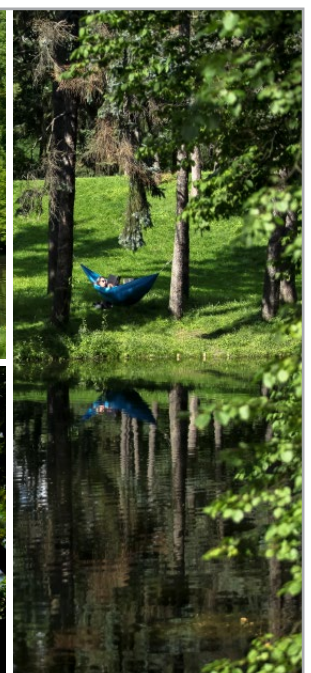
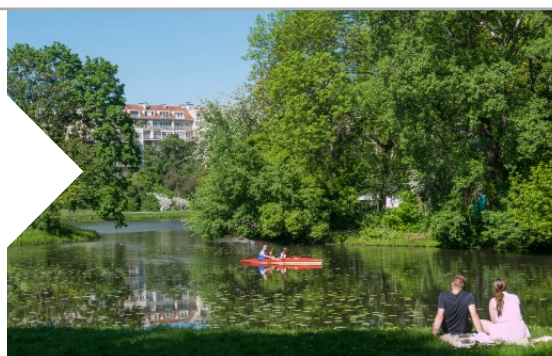
This quarter was designed in line with the principles of a garden city in the interwar period. Its first residents were Polish generals and officers. It is dominated by manor-style buildings surrounded by greenery. One of its most charming areas is Słoneczny Square, at the heart of which is a large maple tree.

Source: 12, 13, 14, 15, 16, 17

## Skaryszewski Park – escape from the big city hubbub

One of Warsaw's largest parks is the landscaped and recreational Skaryszewski Park. It features paths, charming groves, gardens, ponds, a cascade, hillocks and glades where visitors can have a picnic, play badminton or do yoga. Art lovers can admire sculptures by famous Polish artists: "The Bather", "The Dancer", and "Rhythm". The area is also extremely important in terms of nature: 125 tree species, among which there are 54 bird species, 23 dragonfly species and 22 butterfly species. It is the only place in Warsaw where nightingales can be heard. On the border of the park lies Kamionkowskie Lake where one can canoe or water-bike in the summer.




Source: 18, 19, 20, 21





## Estimated size of tourist traffic

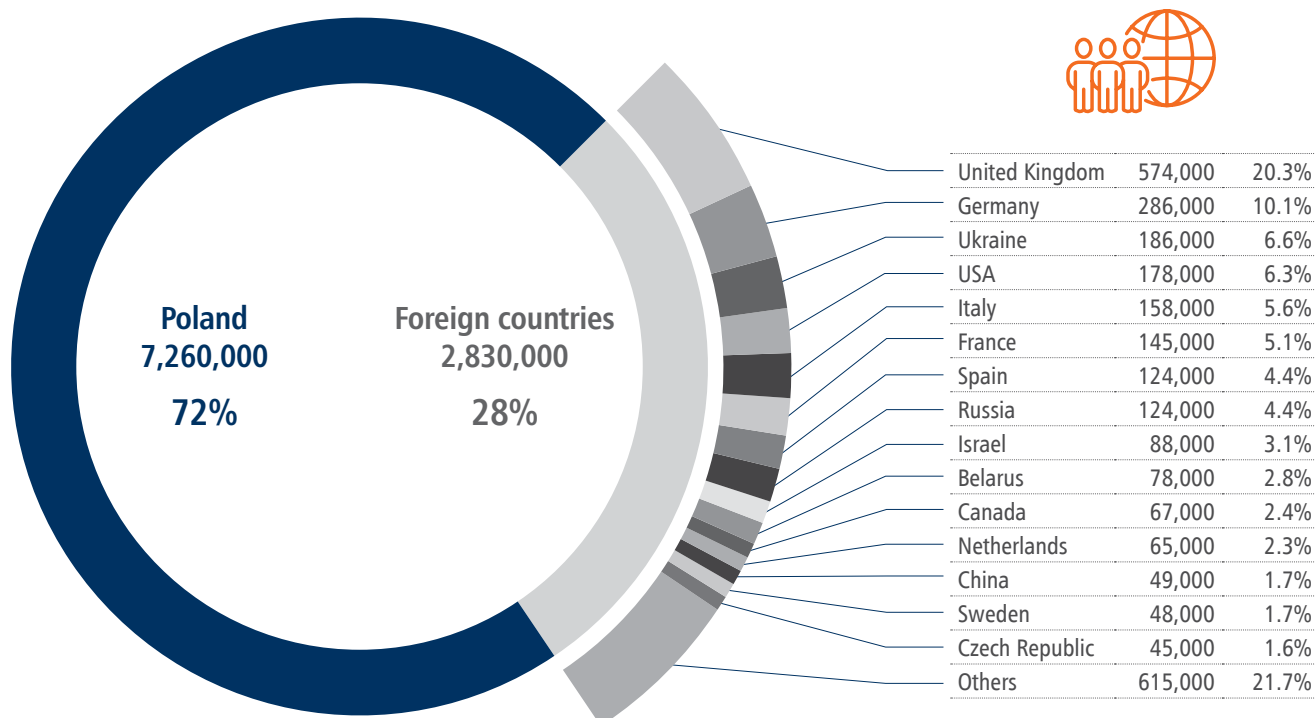
Estimated arrivals of tourists and same-day visitors in 2016-2019

Tourists	2016	2017	2018	2019	2019/2018	2019/2016
 Domestic	6,913,000	7,050,000	7,410,000	7,260,000	↓ 2.0%	↑ 5.0%
 Foreign	2,733,000	2,630,000	3,000,000	2,830,000	↓ 5.7%	↑ 3.5%
 Total	9,646,000	9,680,000	10,410,000	10,090,000	↓ 3.1%	↑ 4.6%

Same-day visitors	Domestic	Foreign	Total	Tourists and same-day visitors in total
2019	22,513,000	214,000	22,727,000	32,817,000

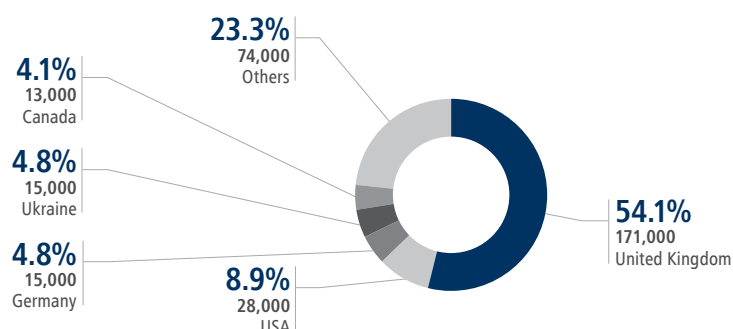
Source: 1, 2, 3, 4, 5

## Estimated arrivals of tourists by country – number and percentage share<sup>4</sup>

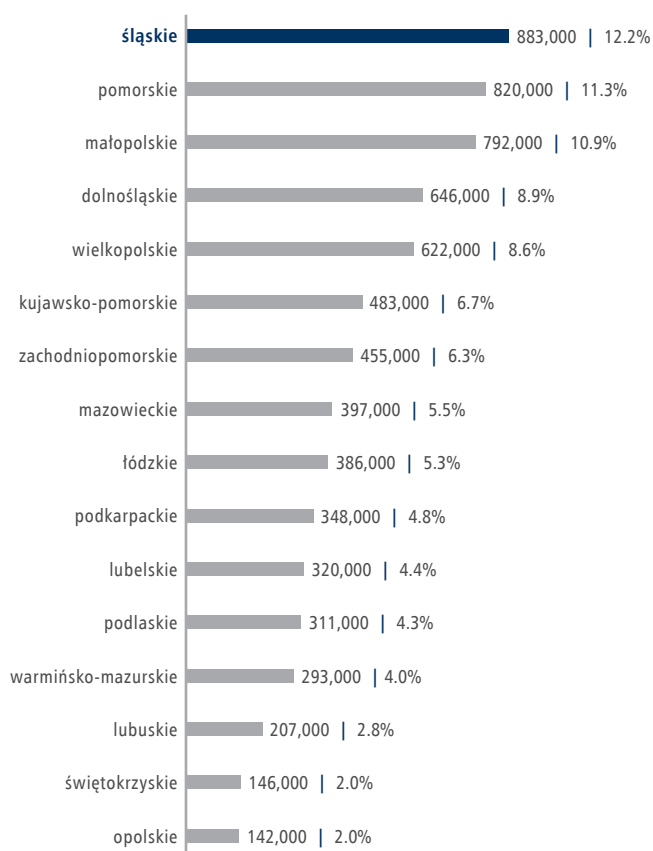




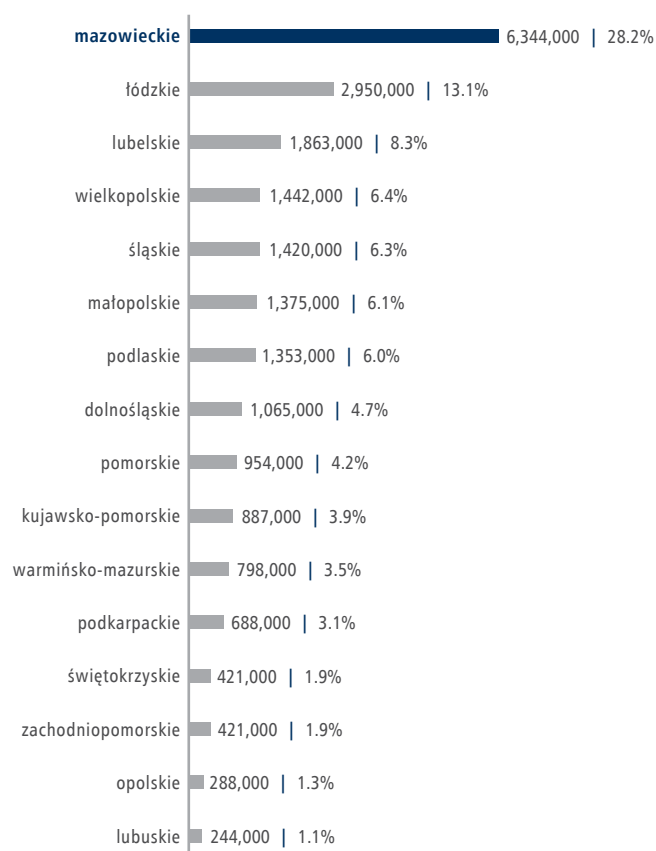
## Estimated arrivals of Polish diaspora tourists by country – number and percentage share<sup>4</sup>



## Estimated arrivals of domestic tourists by voivodship – number and percentage share<sup>4</sup>

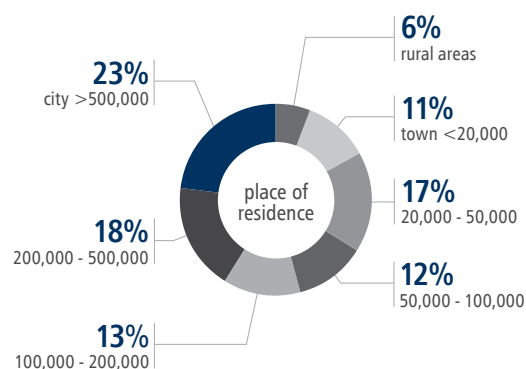
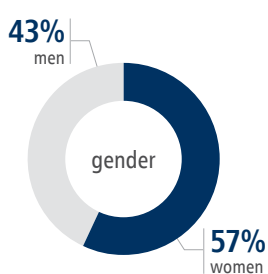
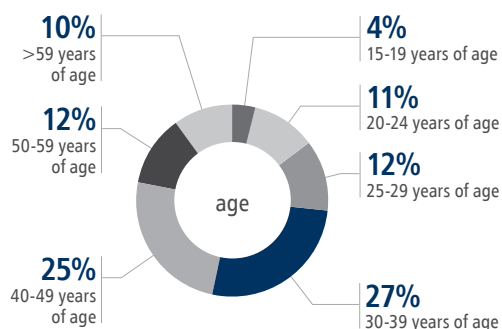


## Estimated arrivals of domestic same-day visitors by voivodship – number and percentage share<sup>4</sup>

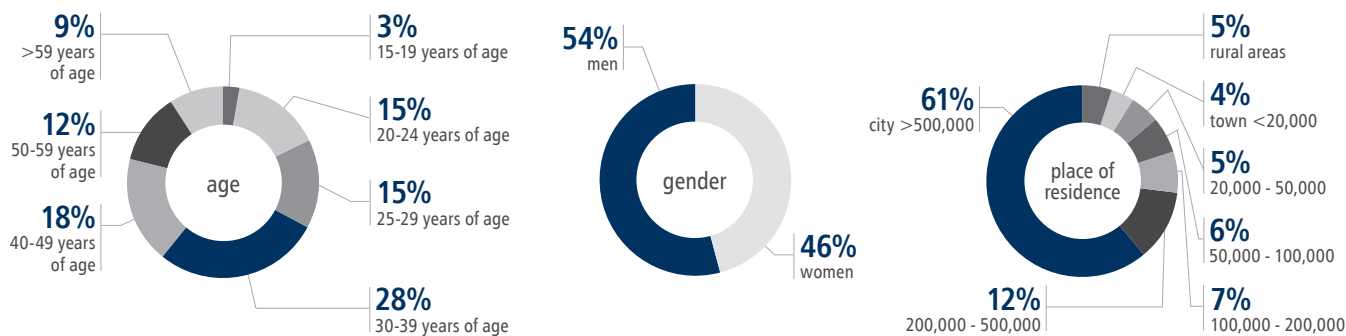


## Profile of tourists visiting Warsaw<sup>6</sup>

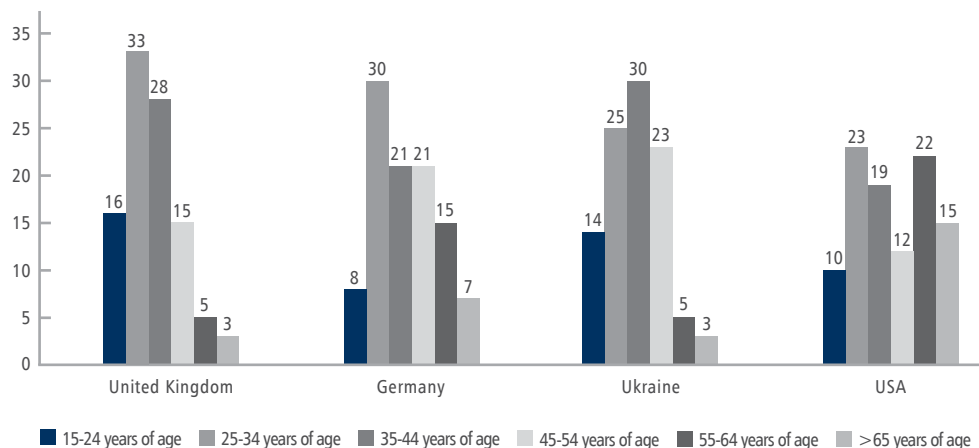
### Domestic tourists



## Foreign tourists



## Foreign tourists – main countries divided into age groups (%)



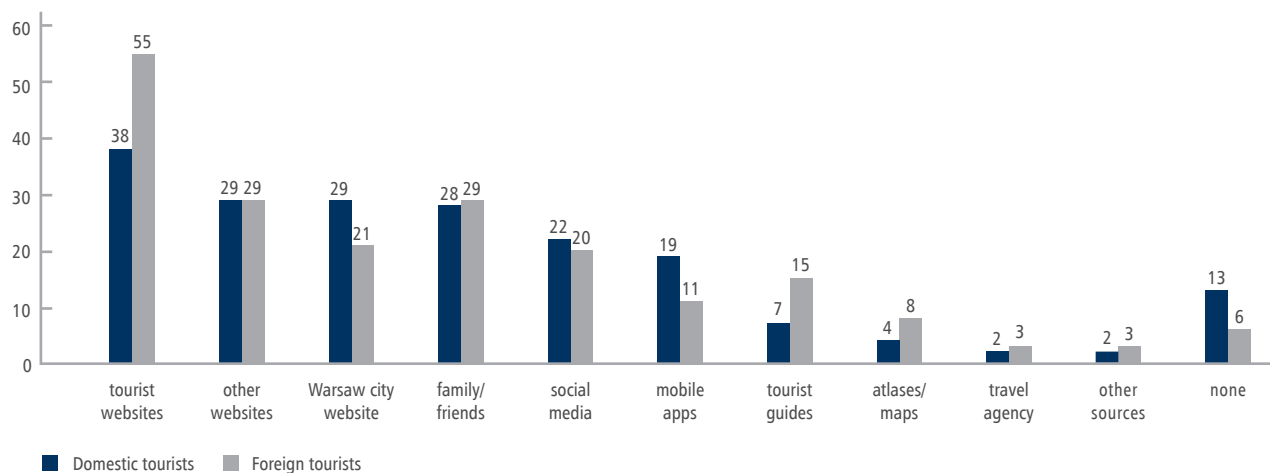
## Profile of a tourist's stay in Warsaw<sup>6</sup>



**84%**

of tourists organise their trip to Warsaw by themselves, for 6% of tourists, the trip is organised by their workplace/company

## Sources of information about Warsaw (%)\*



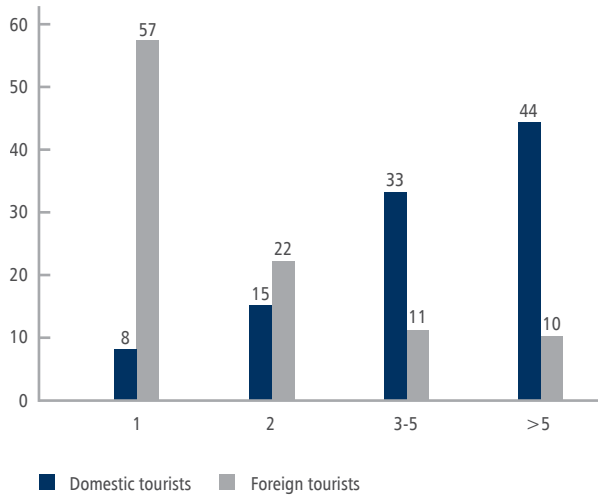
\*total percentage data is over 100% as respondents could indicate more than one source



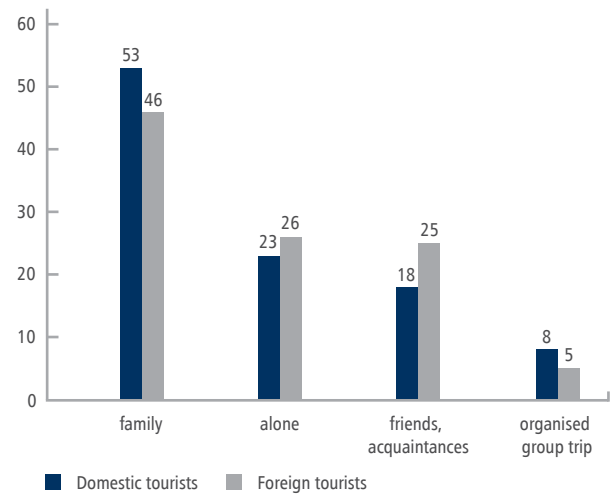
**90%**

of tourists come to Warsaw directly from their place of residence

### Number of visits to Warsaw (%)

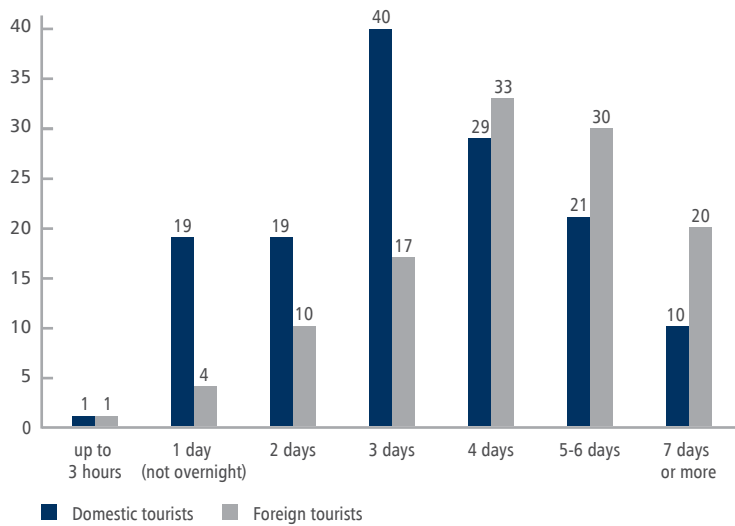


### Travel companions while going to Warsaw (%)\*



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

### Length of stay in Warsaw (%)

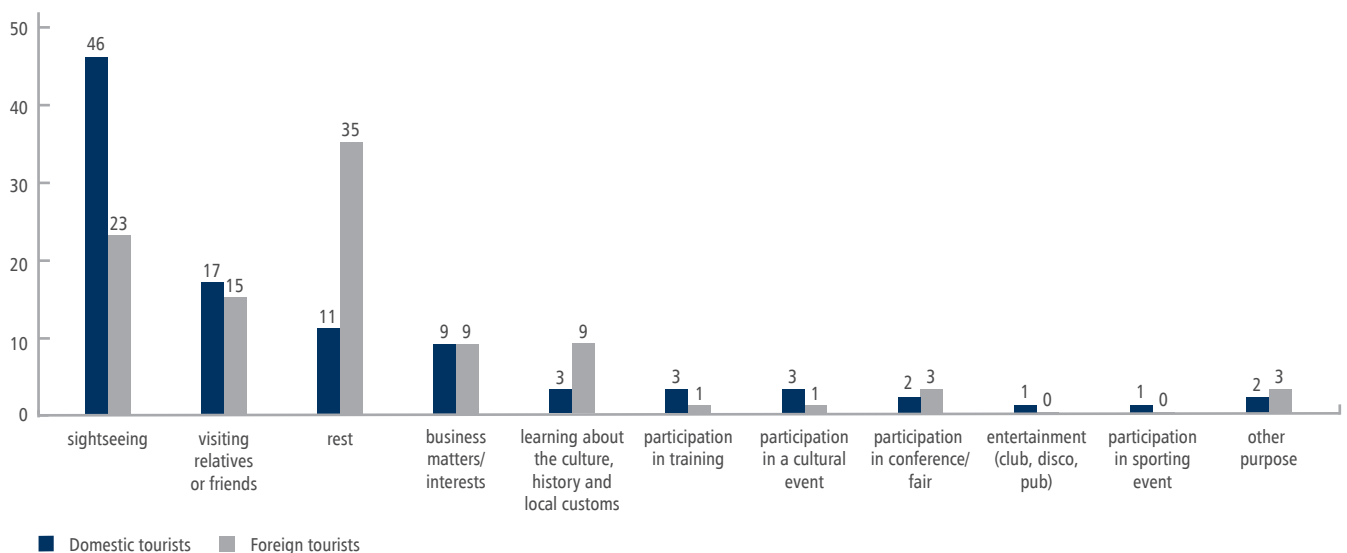


**3.80 days** | ↓ 0.56 days

average length of stay in Warsaw and change in comparison to 2018



### Main purpose of visiting Warsaw (%)



# 7

## FOREIGNER SPENDING IN WARSAW\*



\*expenses of tourists, same-day visitors, expats and other foreigners who have stayed in Warsaw



**EUR 2.2 billion**

spent by foreigners  
in Warsaw



3%  
in comparison to 2018



**EUR 568**

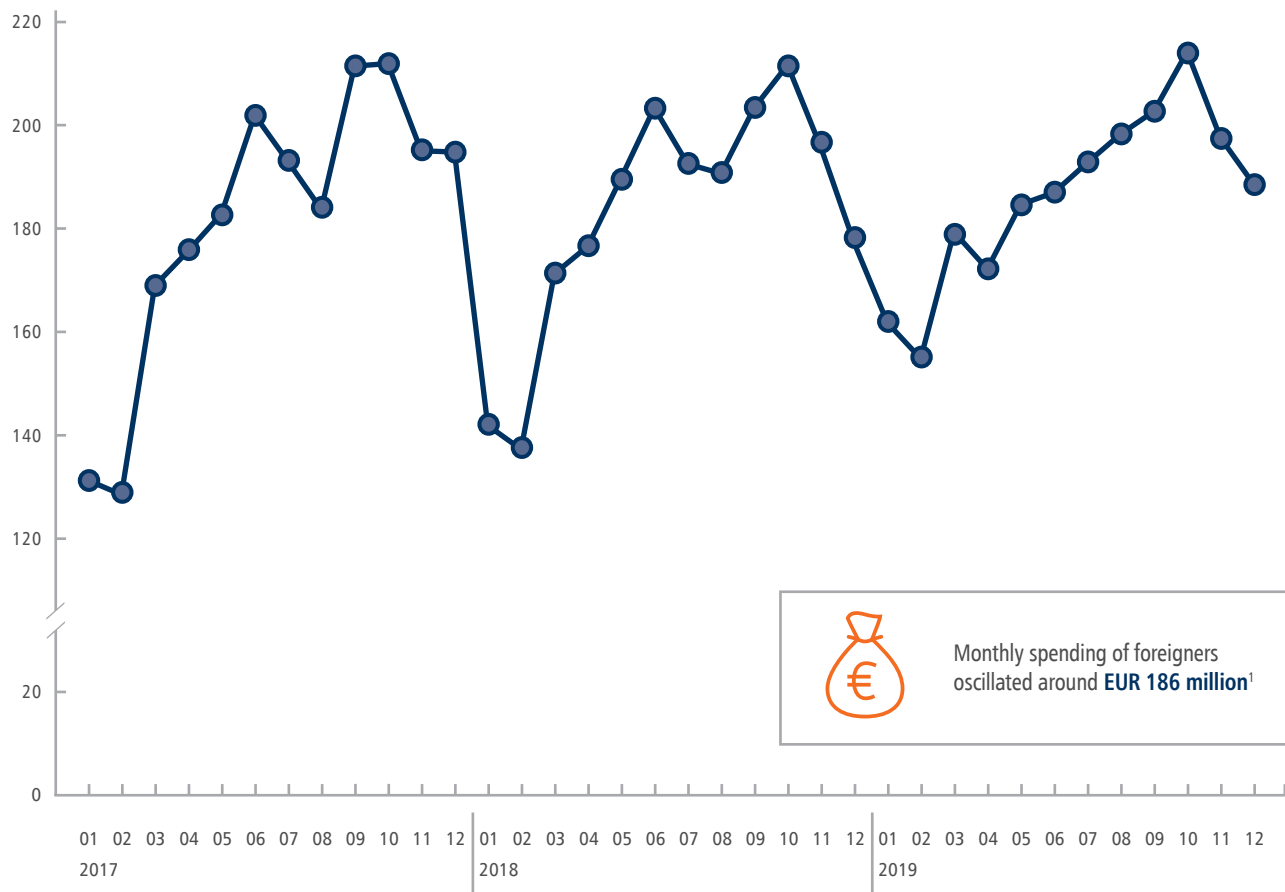
spent by foreigners on average  
per person in Warsaw



9%  
in comparison to 2018

Source: 1

### Annual spending of foreigners broken down into months in 2017-2019 (EUR million)<sup>1</sup>



### Top 3 foreigner spending categories<sup>1</sup>



**accommodation**  
**EUR 0.7 billion**  
**29%**

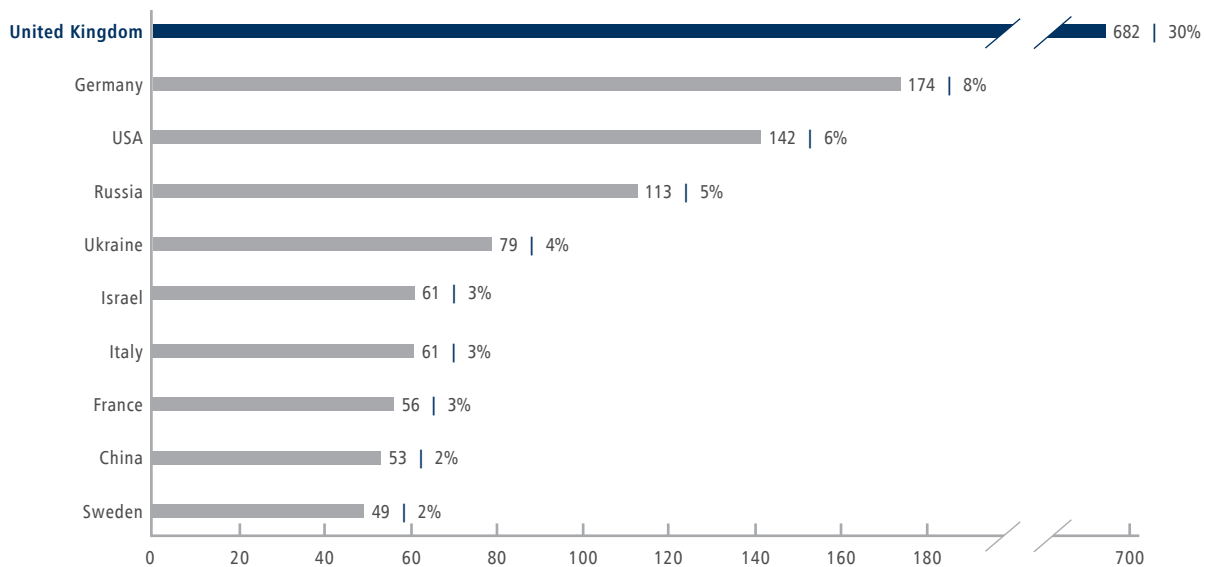


**restaurants**  
**EUR 0.4 billion**  
**17%**

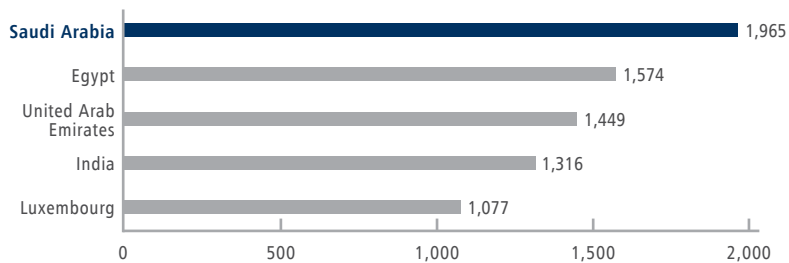


**fashion**  
**EUR 0.3 billion**  
**13%**

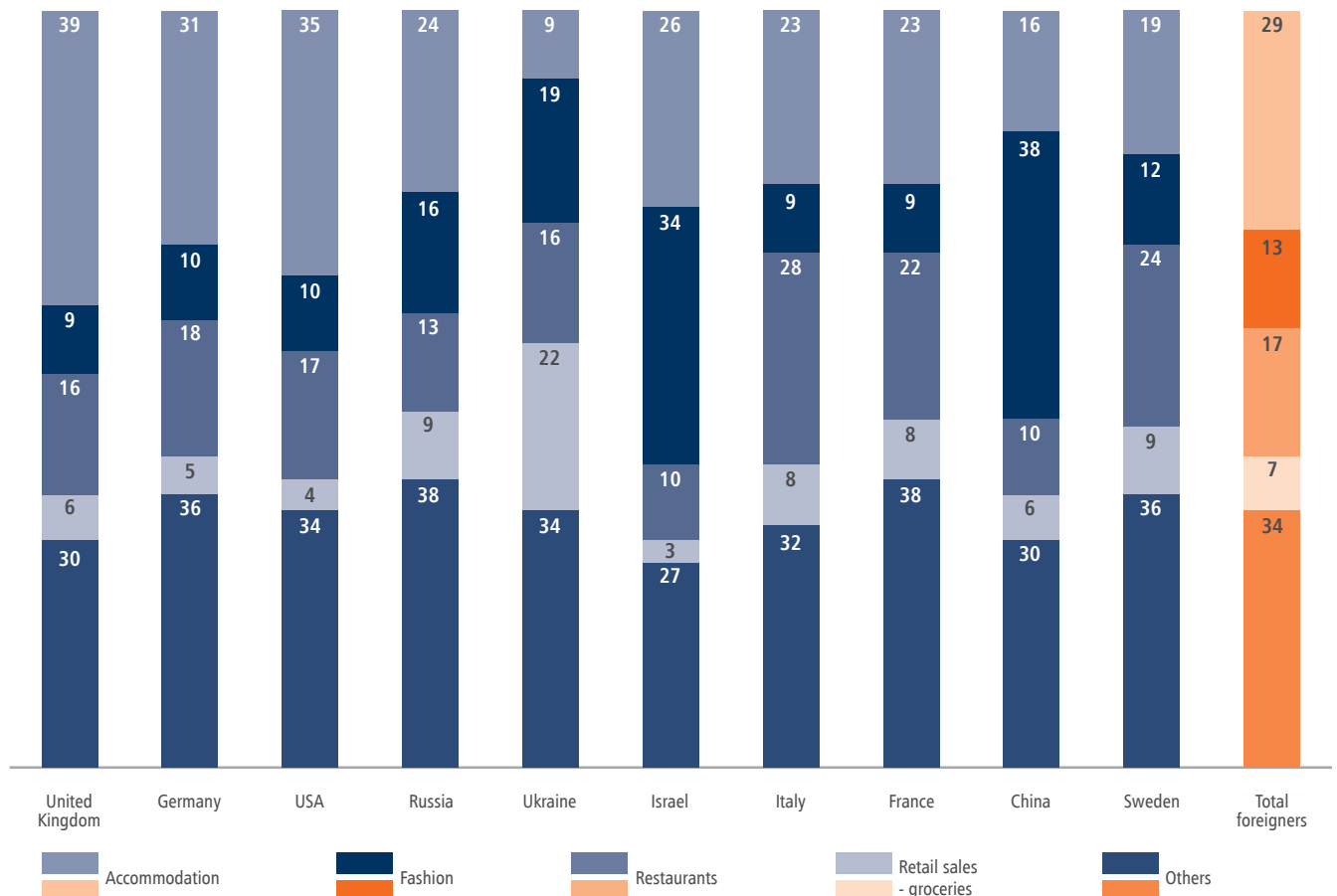
## Top 10 countries whose residents spent most (EUR million)<sup>1</sup>



## Top 5 countries whose residents spent most per person (EUR/person)<sup>1</sup>



## Spending structure of the top 10 countries whose residents spent most in comparison to total foreigner spending structure (%)<sup>1</sup>





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.



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 domestic hotel infrastructure. 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.



Warsaw is the **unquestioned leader** in terms of the number of business and scientific events in Poland (congresses, conferences, fairs, incentive meetings, events). In 2019, Warsaw obtained information on approximately 15,800 events that took place in about 40 venues, which is only one part of the Warsaw conference infrastructure.

Source: 1

### The most important events in 2019<sup>1</sup>

European Psychiatric Congress (EPA)	4 days	4,300 participants	European Congress on Clinical Neurophysiology (ECCN)	4 days	1,000 participants
Amazon Web Services (AWS) Global Summit	1 day	2,200 participants	European Design Festival (ED)	4 days	500 participants
Annual Meeting of the European Association of Biblica Studies (EABS)	4 days	800 participants	BNI Global Convention	4 days	1,300 participants



### Warsaw according to the world-famous ICCA ranking (International Congress And Convention Association)



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

Source: 2, 3

## Number and characteristics of events\*



**15,761**

Number of events<sup>1</sup>

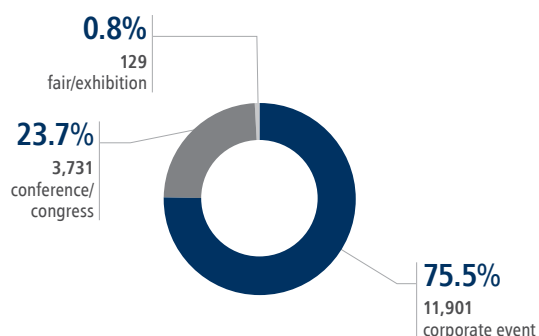


**2,773,932**

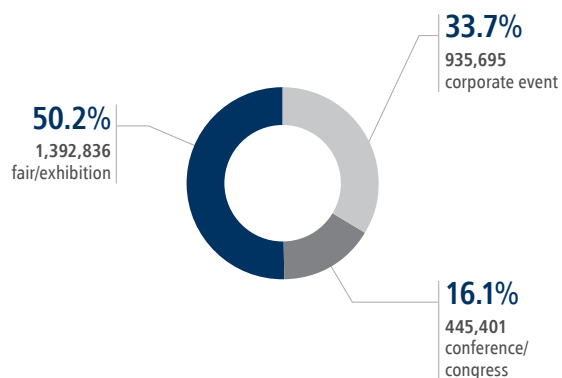
Number of participants of events<sup>1</sup>

\*based on Warsaw Convention Bureau data from information provided directly by congress and fair venues and obtained from the Demand Outlook system operated by Z-Factor. 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.

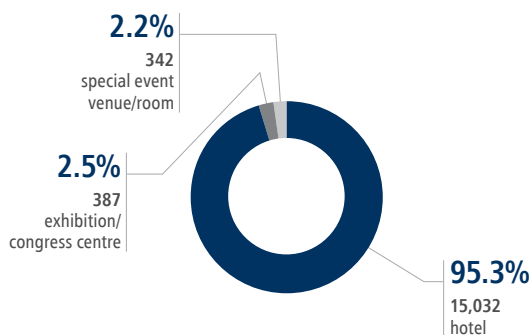
### Events by type of meeting – number and percentage share<sup>1</sup>



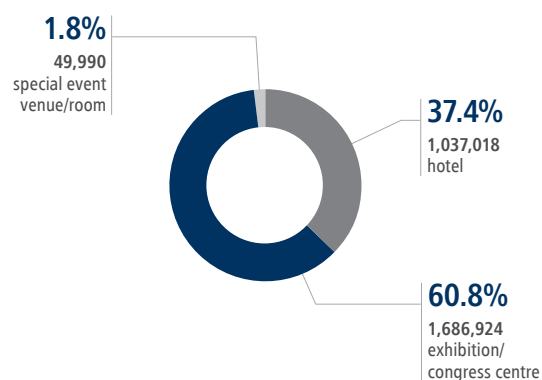
### Participants of events by type of meeting – number and percentage share<sup>1</sup>



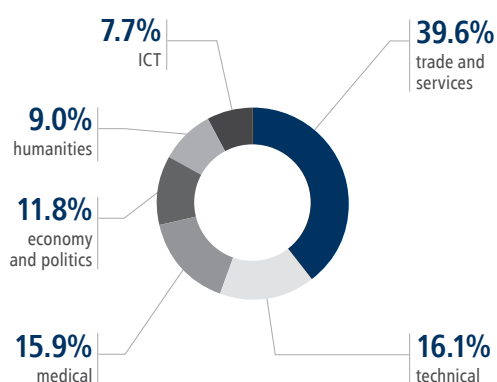
### Events by venue type – number and percentage share<sup>1</sup>



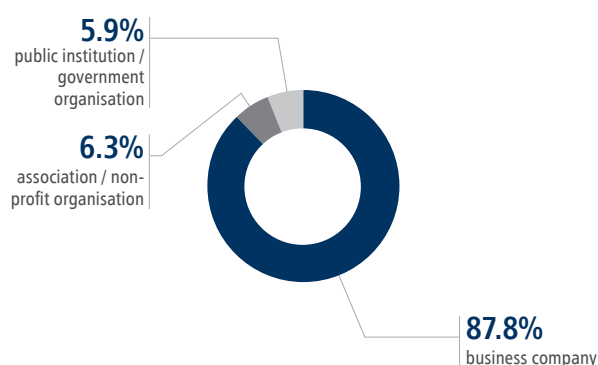
### Participants of events by venue type – number and percentage share<sup>1</sup>



### Events by industry<sup>1</sup>



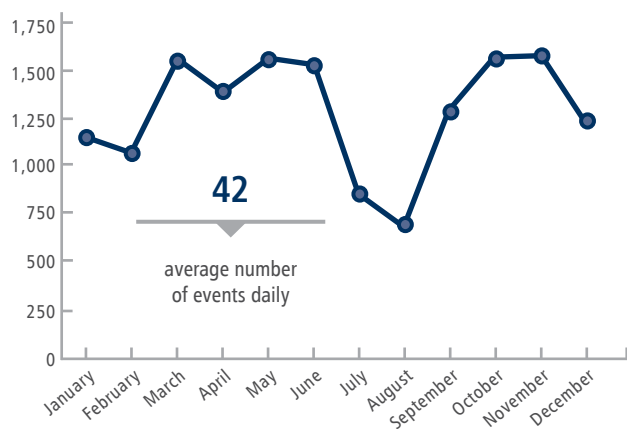
### Events by type of organiser<sup>1</sup>



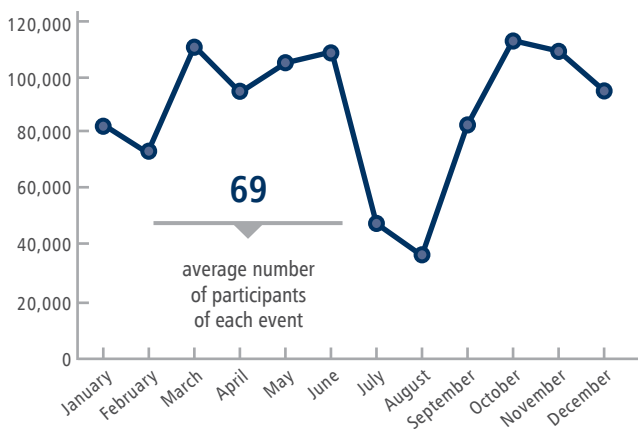
## Warsaw conference market characteristics\*

\*based on data obtained from the Demand Outlook system (operated by Z-Factor) by the Warsaw Convention Bureau

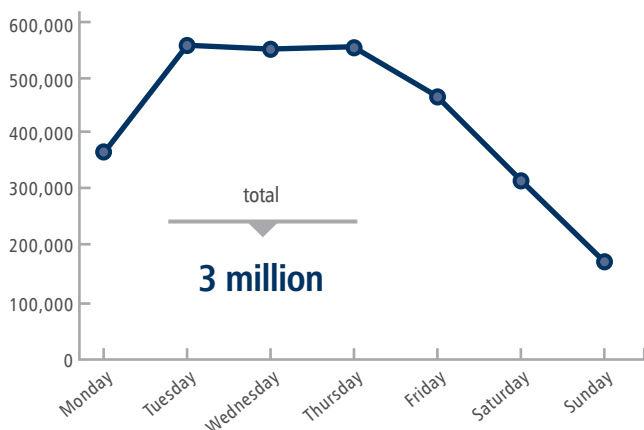
### Events by month<sup>1</sup>



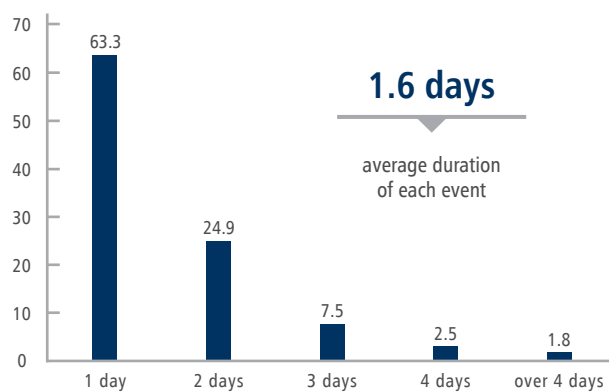
### Participants of events by month<sup>1</sup>



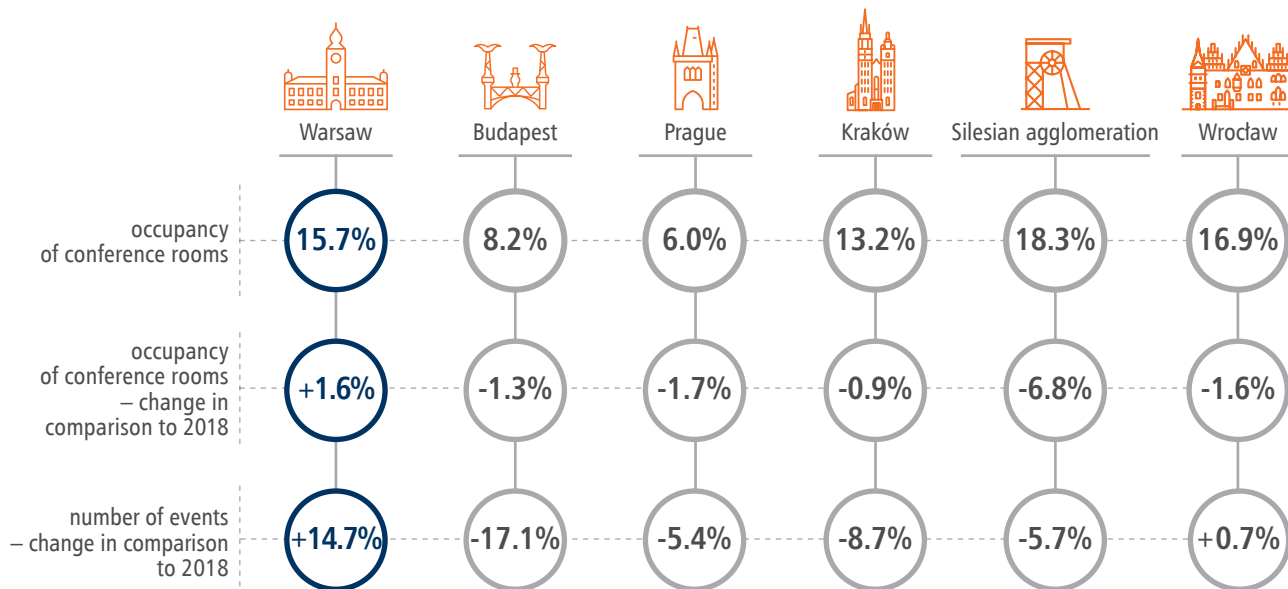
### Space used by day of the week (m<sup>2</sup>)<sup>1</sup>



### Events by duration (%)<sup>1</sup>

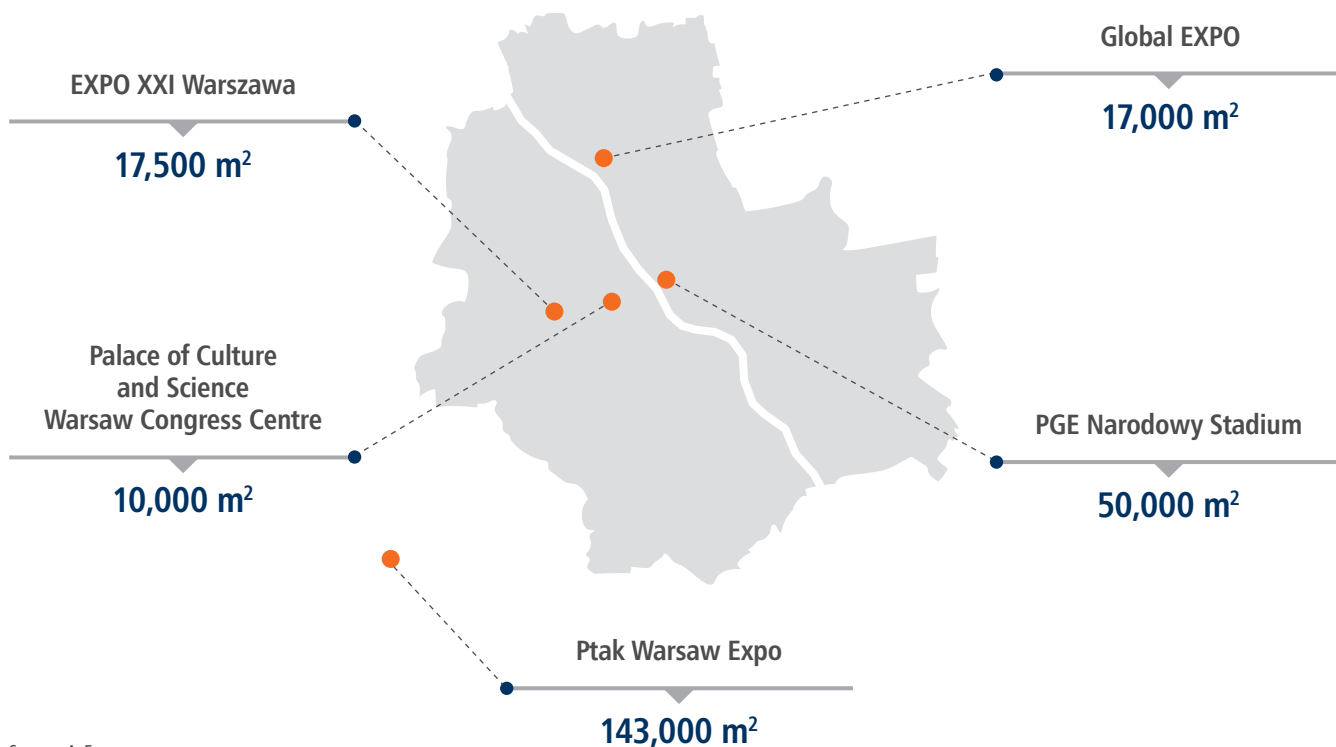


### Occupancy of conference rooms and the number of events compared with selected cities<sup>1</sup>



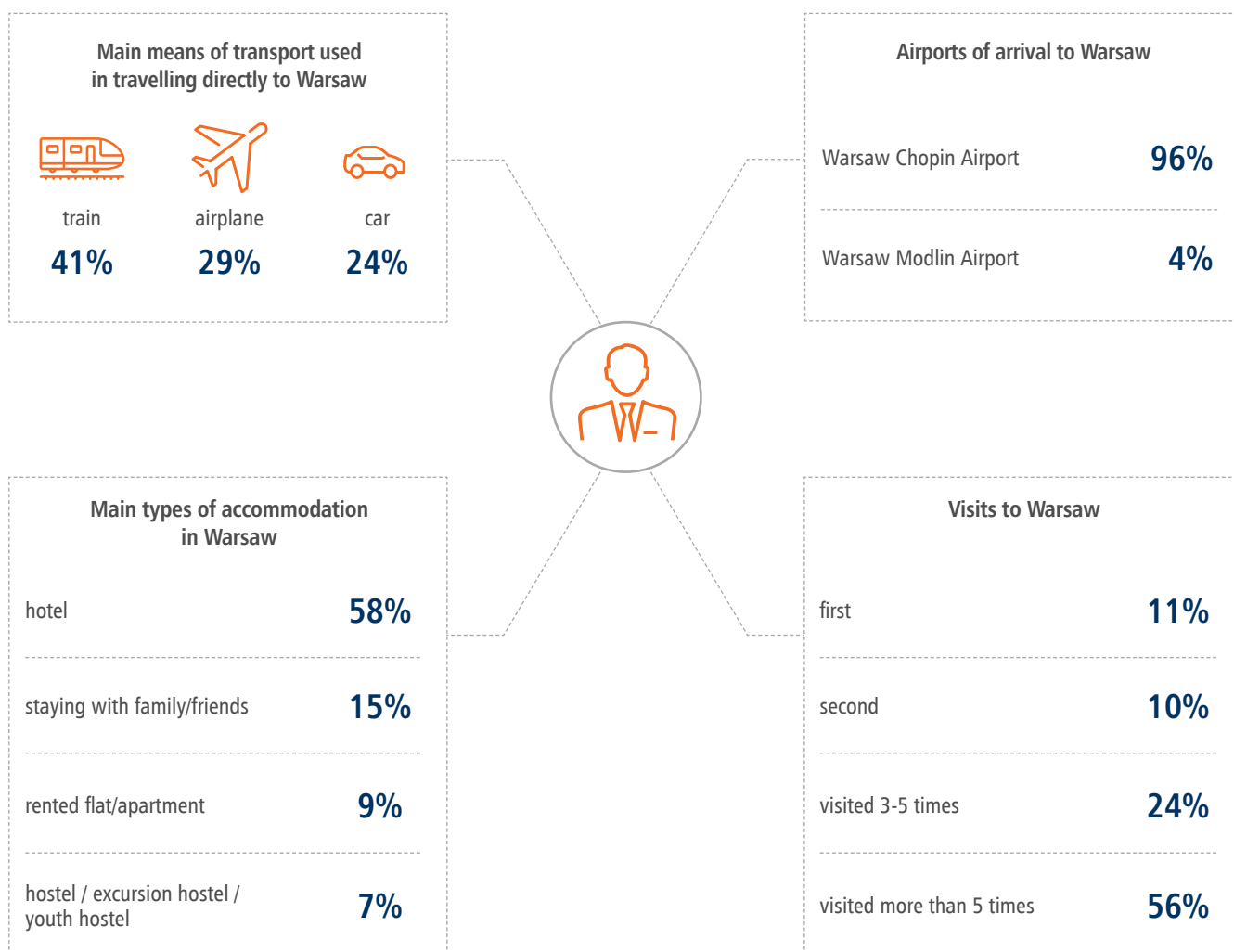


## Exhibition space of selected venues



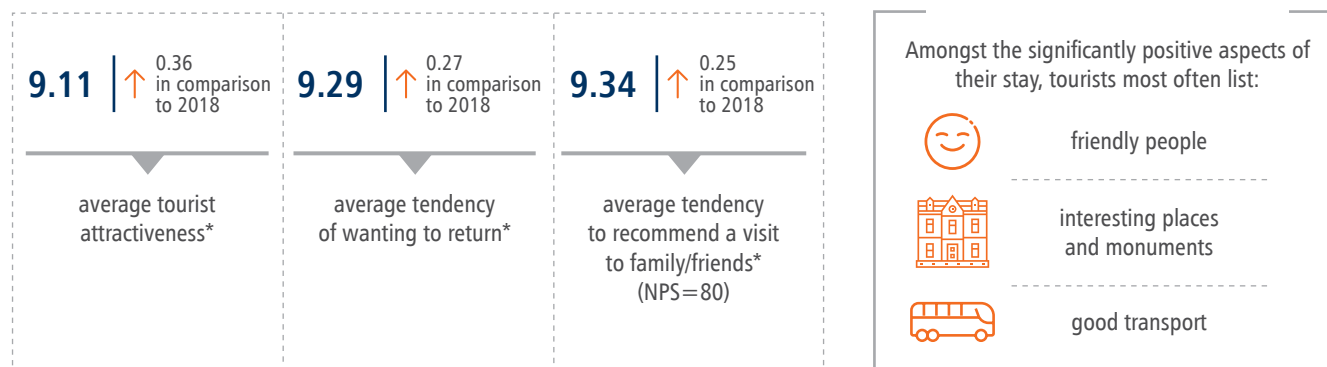
Source: 4, 5

## Tourist traffic characteristics – business tourists<sup>6</sup>





## Warsaw according to tourists<sup>1</sup>



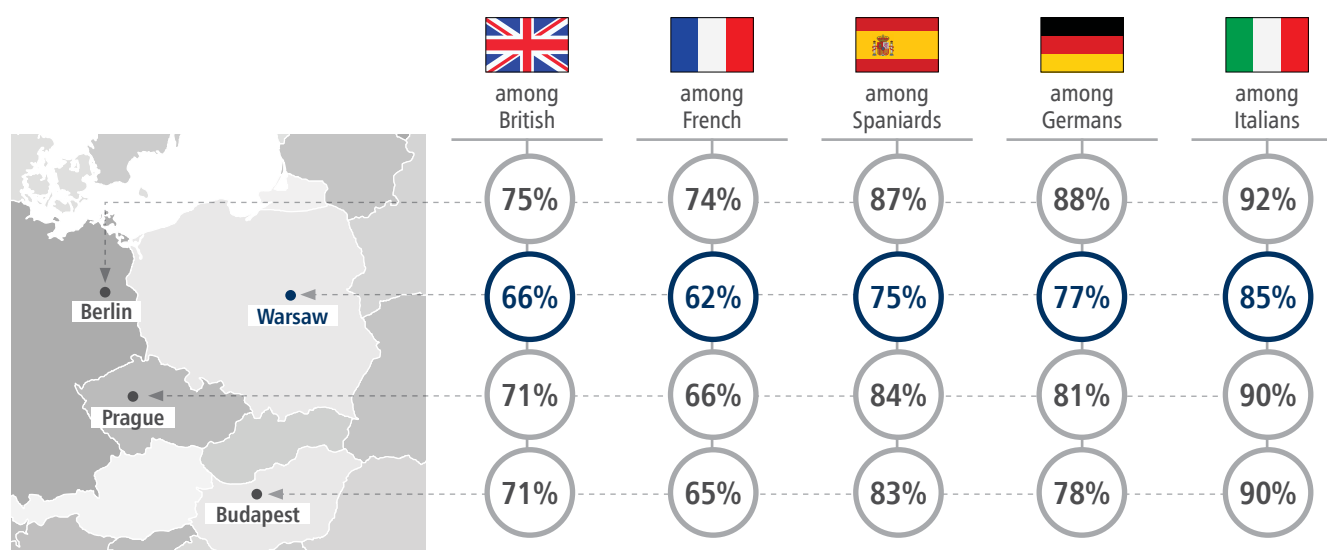
\*on a scale of 1 to 10

## Warsaw's image among residents of selected European countries\*

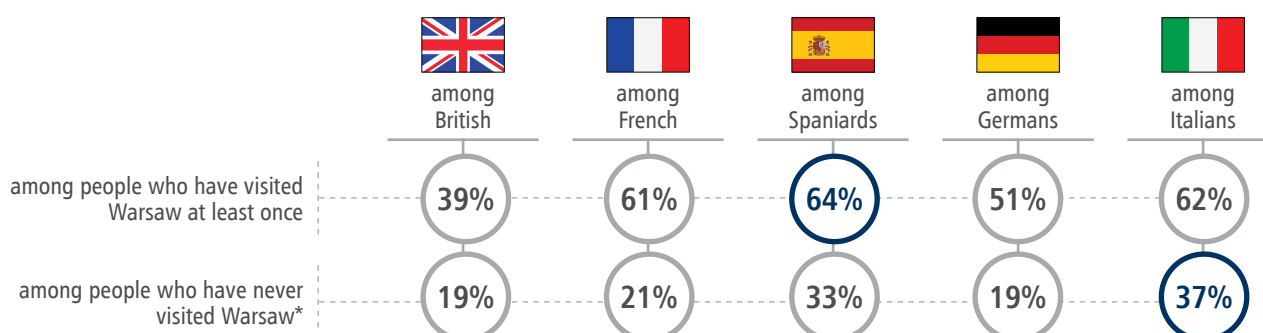
\*France, Spain, Germany, United Kingdom, Italy

Source: 2

### Knowledge of Warsaw in comparison to selected European cities

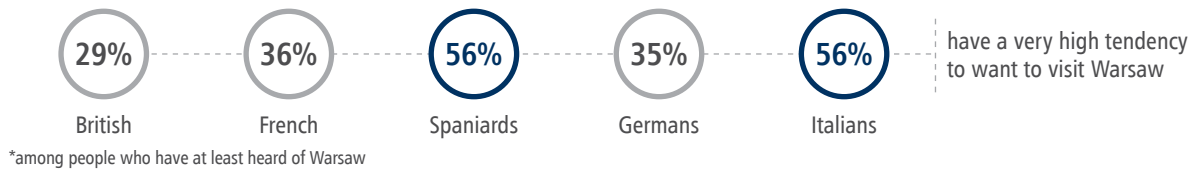


### Positive impressions associated with Warsaw

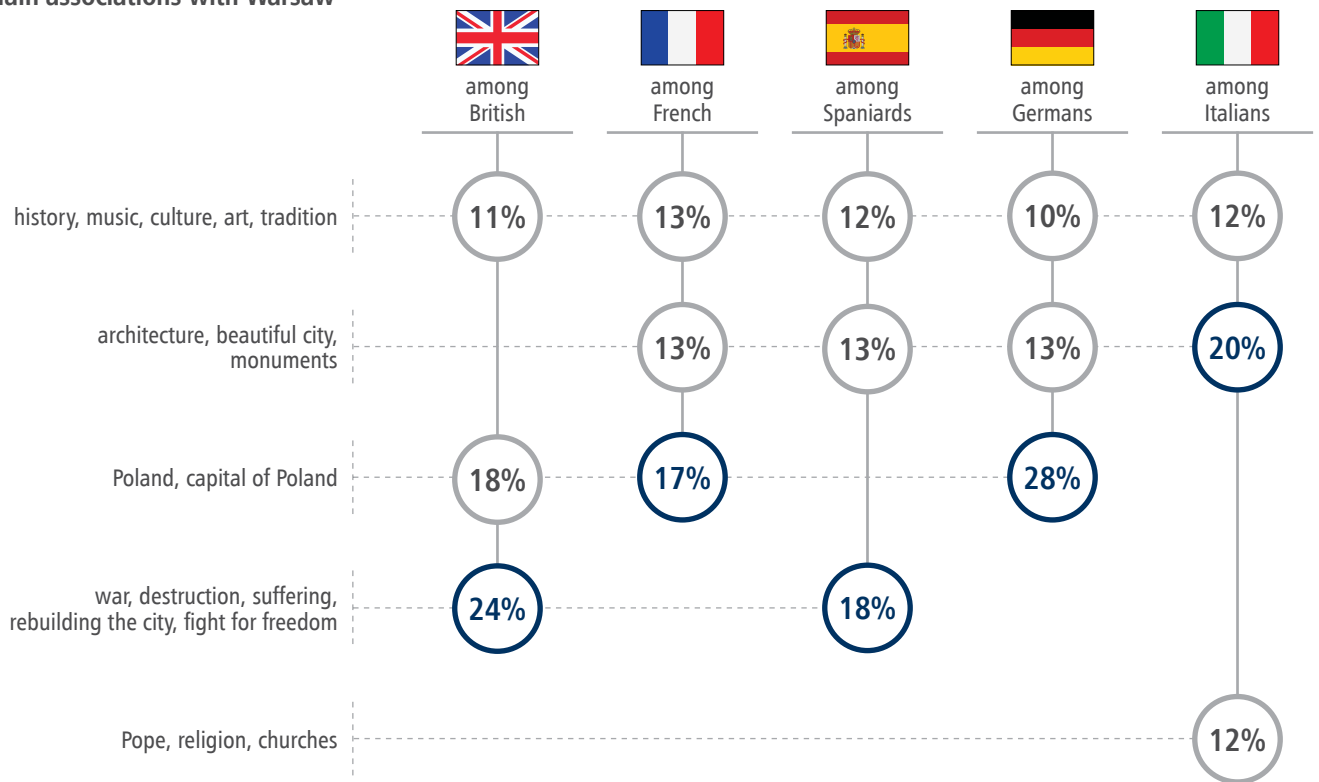


\*among people who have at least heard of Warsaw

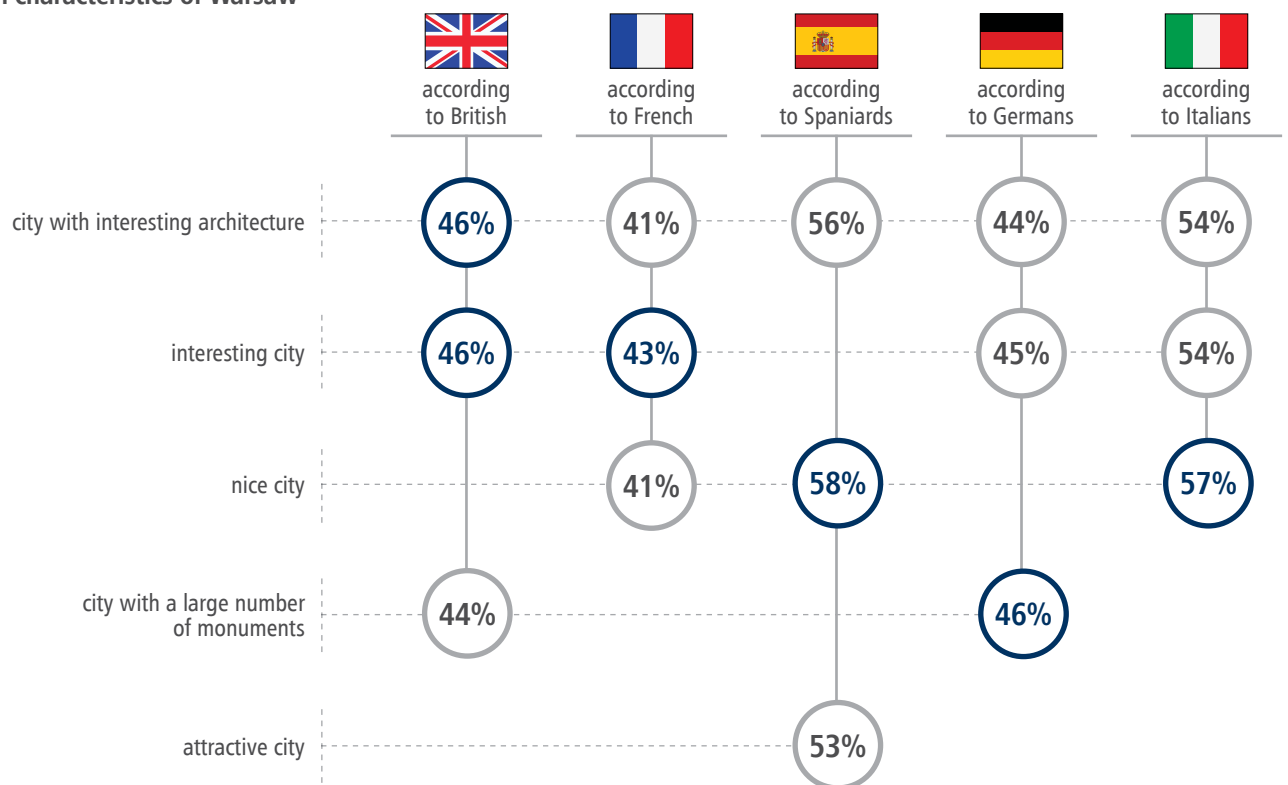
## Tendency to want to visit Warsaw\*



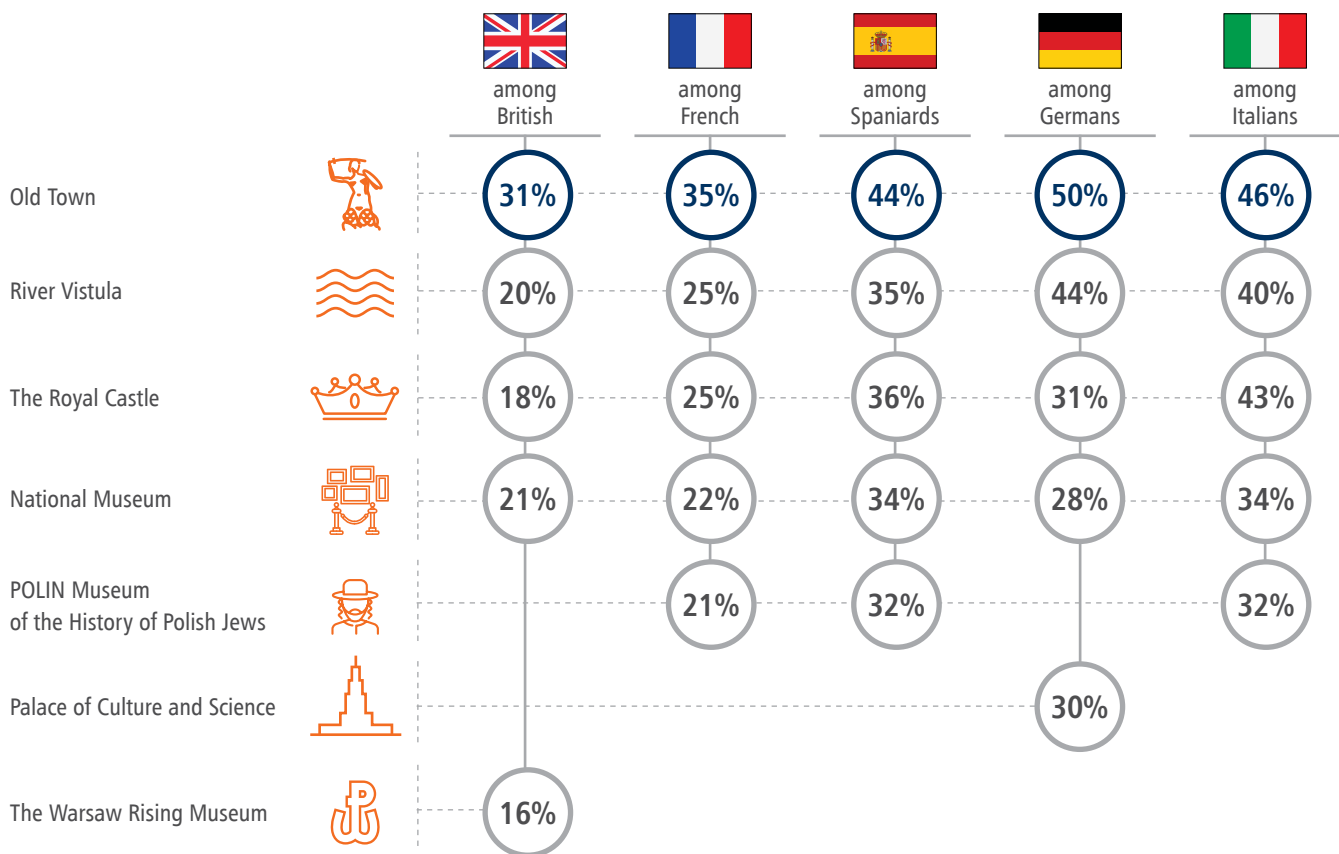
## Main associations with Warsaw\*



## Main characteristics of Warsaw\*

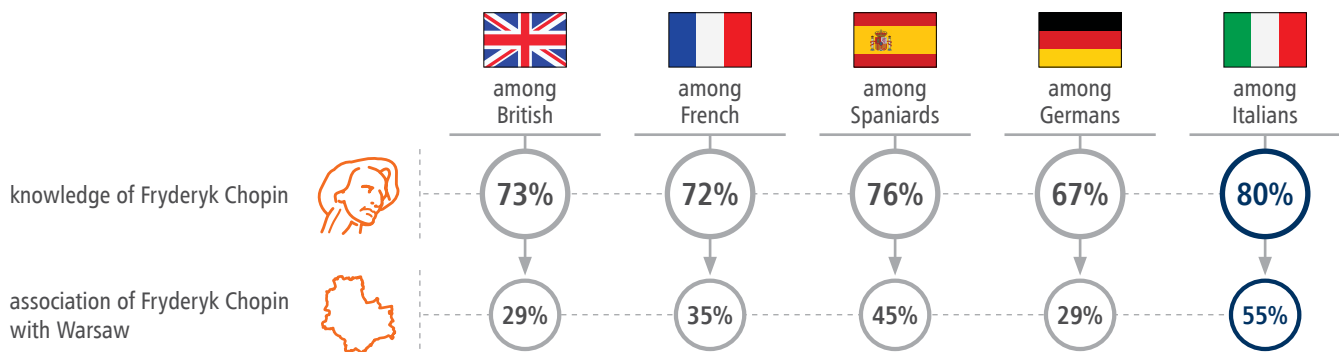


## Warsaw's most famous buildings and sites\*



\*among people who have at least heard of Warsaw

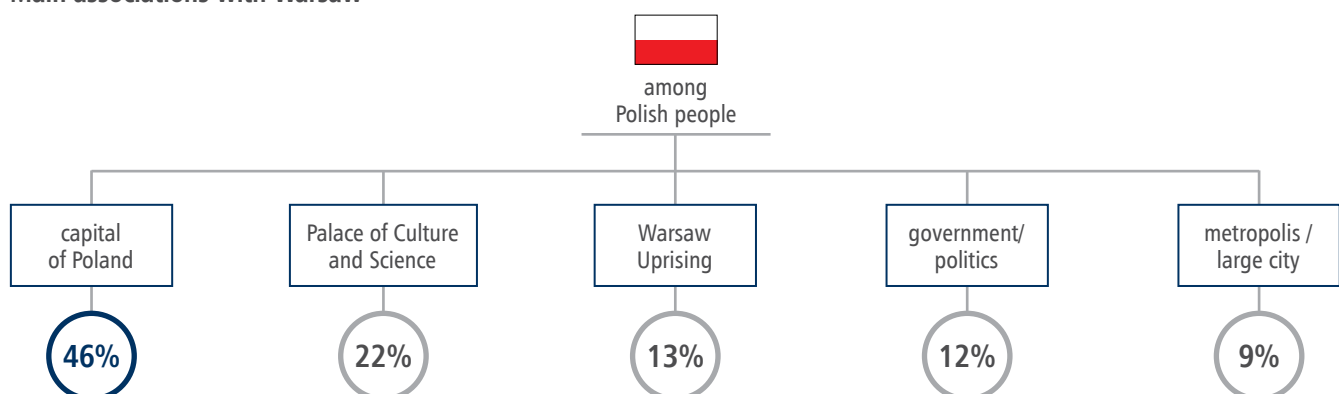
## Recognisability of Fryderyk Chopin\*



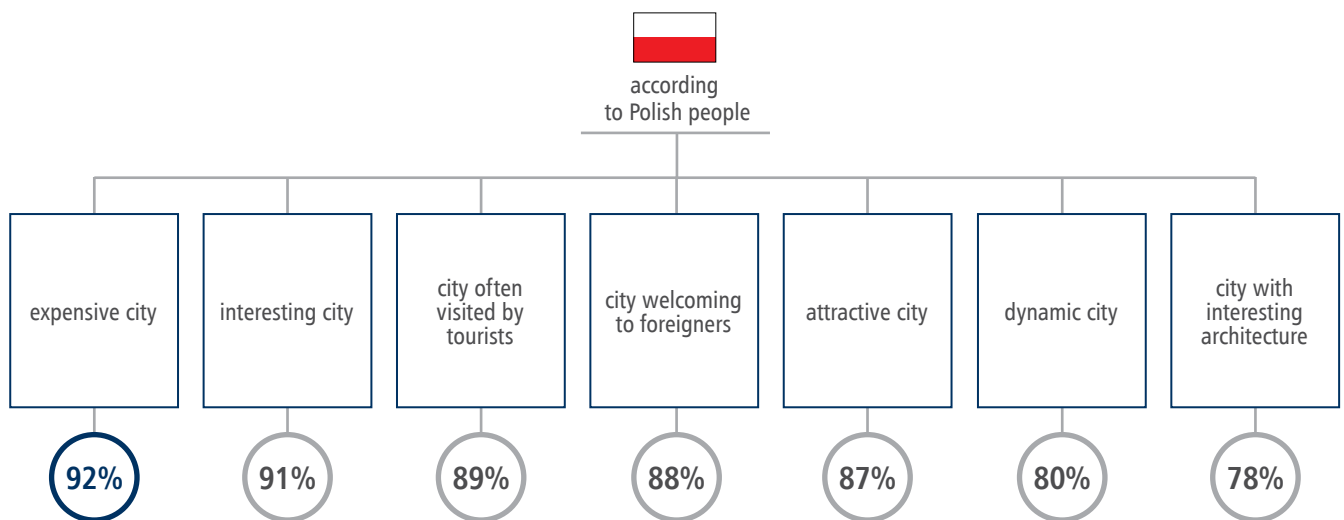
\*among people who have at least heard of Warsaw

## Warsaw's image among Polish people<sup>3</sup>

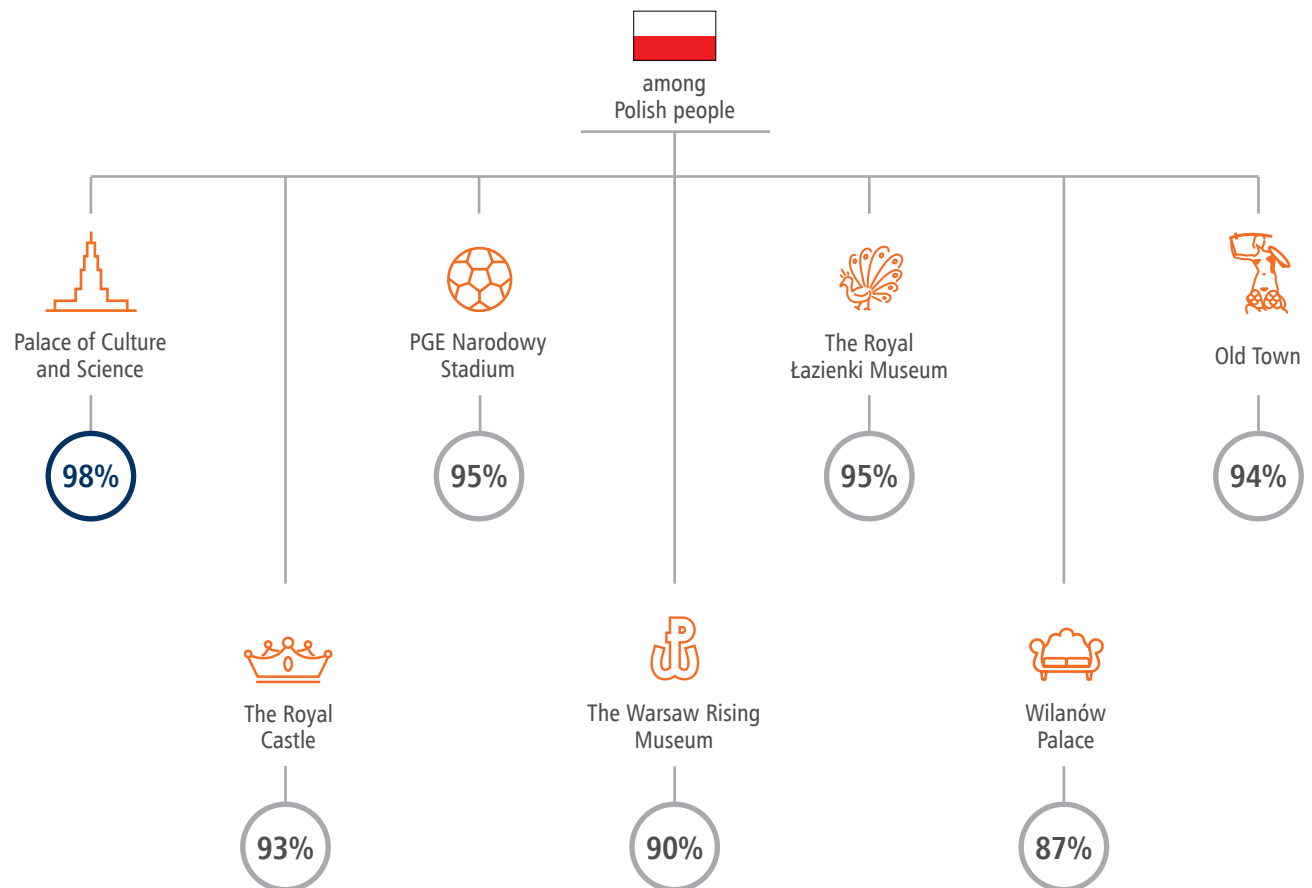
### Main associations with Warsaw



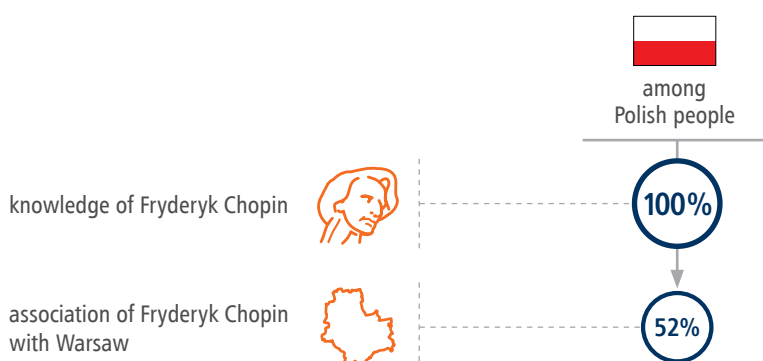
## Most distinctive features of Warsaw



## Warsaw's most famous buildings and sites



## Recognisability of Fryderyk Chopin



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1. Szacunek liczby obcokrajowców (w tym turystów, ekspatów) oraz wielkości ich wydatków w Warszawie w latach 2017-2019, Mastercard, 2019

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### Photographs:

Introduction: photo City of Warsaw

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All amounts given in EUR are calculated based on the average Bank of Poland exchange rate in 2019 (1 EUR = 4.298)





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