



# TOURISM IN WARSAW

REPORT 2020



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## Foreword

2020 was unlike any other year... The COVID-19 pandemic brought the whole world to a standstill. Travel restrictions, closed hotels and restaurants, as well as cancelled conferences and trips. Without a doubt, tourism was one of the industries most badly hit by the crisis. Warsaw, which is usually full of visitors from Poland and abroad, was empty for months. How is it possible to sum up this past year under such circumstances?

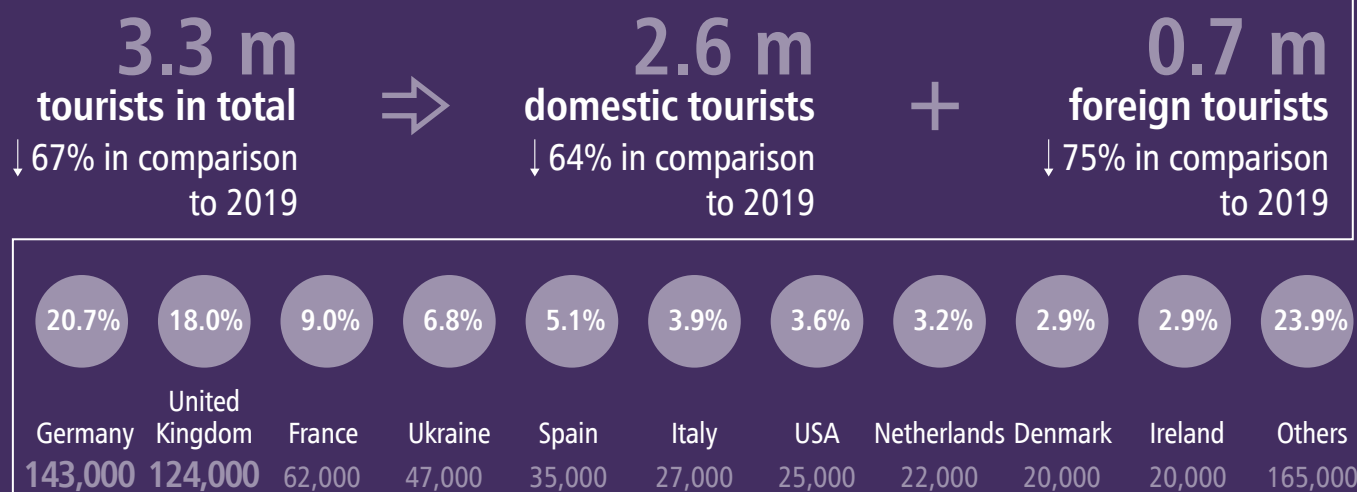
The numbers speak for themselves: compared to 2019, tourist traffic in Warsaw shrank by two-thirds and the impact of tourism on Warsaw's economy decreased by one-third.

However, this does not at all mean that 2020 was a complete loss for the industry. Despite the obvious difficulties, new hotels opened in Poland's capital and impressed with their design and level of service. There has been an increase in interesting attractions, including those located outside the city centre and in the vicinity of Warsaw. Year on year, the city is becoming increasingly more diverse, also in terms of its range of foods on offer and there is probably no world region whose cuisine cannot be tasted here in Warsaw. Both the largest of attractions and those hidden away in less obvious parts of the city are within easy reach thanks to the capital's extensive and convenient transport network.

Warsaw's local authority appreciates the role of tourism in the city's development and gives tangible expression to this by increasing investment. This was also the case in 2020, despite the difficulties of the pandemic. The transformation of the heart of the capital into a more resident- and tourist-friendly place has already begun; the construction of the Museum of Modern Art has also started.

The past dozen or so months have been an exceptionally difficult period for those involved in broadly-defined tourism. Now it is time to rebuild what has been lost. The people of Warsaw have repeatedly shown that they can emerge from crises stronger than anyone else.

## Estimated number of arrivals of tourists in Warsaw



## Tourist accommodation and its use



**1.3 million** tourists have used accommodation establishments

including 327,551 foreign tourists

↓ **65.3%** in comparison to 2019

↓ **75.9%** in comparison to 2019

**2.3 million** nights spent by tourists in accommodation establishments

↓ **64.3%** in comparison to 2019

**24.7%** occupancy in hotels

↓ **45.6 pp** in comparison to 2019

## Estimated tourist spending in Warsaw

**EUR 1.25 billion** tourists in total

EUR 0.59 billion domestic tourists

EUR 0.66 billion foreign tourists

### TOP3 shopping categories on which tourists spent most

EUR 338 million retail

EUR 165 million catering

EUR 134 million fashion

## Impact of tourism on the economy of Warsaw

**EUR 2.8 billion**  
estimated contribution  
of the tourist economy  
to Warsaw's GDP

↓ **36%**  
in comparison  
to 2019

• **64%**  
• **67%**

of residents believe that Warsaw  
is not crowded with tourists

of Varsovians believe their everyday  
life is not disturbed by tourists

**87,703 people**  
estimated employment  
in branches of tourism

↓ **1.8%**  
in comparison  
to 2019



**43,731 visitors**  
have used Warsaw Tourist  
Information centres

## Tourist attractiveness of Warsaw

### Most popular main purposes of visit

domestic tourists | foreign tourists



sightseeing

26% | 26%



visiting relatives  
or friends

19% | 11%



business matters /  
interests

17% | 10%



rest

13% | 27%

### Top Warsaw attractions according to tourists

domestic tourists

Old Town 37%

The Royal Łazienki Park 24%

Palace of Culture and Science 20%

Copernicus Science Centre 14%

The Warsaw Rising Museum 14%

foreign tourists

51% Old Town

23% POLIN Museum  
of the History of Polish Jews

18% The Royal Castle

17% Palace of Culture and Science

16% The Royal Łazienki Park

8.5

average tourist  
attractiveness

9.2

average tendency  
of wanting to return

9.0

average tendency  
to recommend a visit  
to family/friends

on a scale of 1 to 10





# 1 | Selected social and economic information

## Basic demographic and economic data about Warsaw

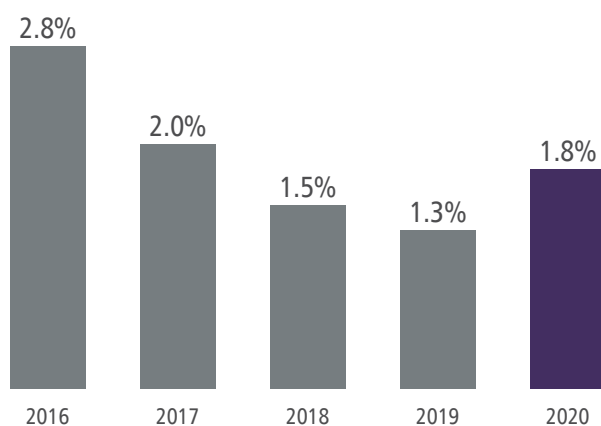
**1,794,166 people**

population at the end of 2020<sup>1</sup>

Varsovians accounted for 33% of the Mazowieckie voivodeship population

highest population increase as compared to 2019 was recorded in the districts of: Wilanów (↑ 3.1%), Białoleka (↑ 2.5%) and Ursus (↑ 1.8%)

## Registered unemployment rate at the end of December in 2016-2020<sup>2, 3, 4</sup>



**Note:** The increase in the registered unemployment rate compared to the same period in 2019 was influenced by, among other things, the COVID-19 pandemic restrictions. Entrepreneurs in many industries were forced to temporarily reduce or cease operations, which translated into the need to reduce employment.

63% of residents in 2019 believed it was **easy to find a good job in Warsaw**. The most optimistic people in the EU in this regard were residents of Prague where 81% believed that it was not difficult to find a good job.<sup>5</sup>



77% of Warsaw entrepreneurs in 2020 expressed the opinion that the Polish capital is a place where it is **easy to attract highly qualified and creative employees** from across the country, and 36% believed that Warsaw was attractive for foreign workers.<sup>6</sup>



Over 100,000 **EU citizens** worked in Warsaw in 2020.<sup>7</sup>



**EUR 1,455.82**

average monthly gross wages and salaries  
in enterprise sector in January-December 2020<sup>2, 4, 8</sup>

**↑ 21.3%**

in comparison to 2016

the average gross salary in Warsaw was EUR 80.47  
higher than in the rest of Mazowieckie voivodeship  
and EUR 283.20 higher than in the rest of Poland

the highest gross salary was reported  
by employees working in the information  
and communication sector (EUR 2,153.99)  
and the lowest by those employed  
in the accommodation and catering sector  
(EUR 963.16)

**1,087,300 people**

average paid employment in enterprise sector  
in January-December 2020<sup>2, 4</sup>

**↑ 9.6%**

in comparison to 2016

those employed in Warsaw constituted 71% of all  
those employed in the Mazowieckie voivodeship

the largest decrease in employment  
compared to the corresponding period  
of 2019 was recorded in the accommodation  
and catering section (↓ 5.8%)

**475,287**

number of entities of the national economy  
based in Warsaw in the REGON register  
at the end of December 2020<sup>2, 4</sup>

**↑ 13.3%**

in comparison to 2016

dominated by natural persons running a business  
(55.2%)

most entities were registered in the districts  
of: Śródmieście, Mokotów, Wola, and Praga-  
Południe

1,020 **R&D entities** were operating in Warsaw at the end of December 2019  
with an expenditure which amounted to over EUR 2.1 billion.<sup>9</sup>



27% of the share capital of Warsaw companies was **owned by foreigners** at the end  
of December 2019.<sup>9</sup>



73% of Warsaw entrepreneurs in 2020 positively rated **the growth conditions** of their  
companies in Warsaw.<sup>6</sup>



Fitch Ratings confirmed in 2020 Warsaw's international long-term rating at '**A-**' with a **stable outlook**.<sup>10</sup>

## fDi European Cities and Regions of the Future 2020/21<sup>11</sup>

Ranking of most attractive European locations for future inward investment

**6<sup>th</sup> place**

in the "European Cities of the Future 2020/21" ranking

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

in the 'business friendliness' category

**8<sup>th</sup> place**

in the 'economic potential' category

**10<sup>th</sup> place**

in the 'cost effectiveness' category

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

in the "Eastern European Cities of the Future 2020/21" ranking

## The Global Financial Centres Index 28<sup>12</sup>

Ranking of global financial centres

**57<sup>th</sup> place**

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

among cities in Eastern Europe and Central Asia

## Tholons Global Innovation Index™ 2020<sup>13</sup>

World ranking of best localisations for business services centres

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

in the "Tholons Global Innovation City Index"

## Kearney 2020 Global Cities Index<sup>14</sup>

World ranking of global cities

**61<sup>st</sup> place**

## Office and retail market in Warsaw

**5.91 million m<sup>2</sup>**

modern office space at the end of 2020. This is over 50% of the 9 main office markets in Poland<sup>15, 17</sup>

**314,000 m<sup>2</sup>**

office space handed over for use in 2020 (concentrated around 15 office buildings). The most important ones in 2020 were: Mennica Legacy Tower (47,900 m<sup>2</sup>), The Warsaw Hub complex (88,900 m<sup>2</sup>) and the Varso 1 and 2 buildings (46,600 m<sup>2</sup>)<sup>16</sup>

**559,100 m<sup>2</sup>**

office space under construction in 2020<sup>16</sup>



More than 1.7 million m<sup>2</sup> of **shopping centre space** was available in the Warsaw agglomeration in 2020. Due to the pandemic, retail parks and smaller centres with an everyday shopping profile were more popular among investors.<sup>18</sup>



A trend that is gaining importance is **investments in mixed-use facilities**. In 2020 Elektrownia Powiśle and the next stage of Browary Warszawskie were delivered, whereas the Norblin Factory is under construction.<sup>18</sup>



**96%**

of tourists in 2020 had a positive opinion of what shops and shopping centres had to offer\*<sup>19</sup>

\*people who have used this type of service



## Quality of life in Warsaw

**93%** | of residents in 2020 had positive impressions associated with Warsaw as a place to live<sup>20, 21</sup>  
↑ **3 pp** in comparison to 2016

**82%** | of residents in 2020, given the choice, would prefer to live in Warsaw<sup>21, 22</sup>  
↓ **7 pp** in comparison to 2019

**7%** | would prefer to live in the countryside near Warsaw<sup>21, 22</sup>  
↑ **3 pp** in comparison to 2019

**5%** | would prefer to live in a small town near Warsaw<sup>21, 22</sup>  
↑ **3 pp** in comparison to 2019

**Note:** This change in the distribution of responses compared to 2019 was impacted by, among other things, the COVID-19 pandemic. A large, densely populated city such as Warsaw may be perceived as less attractive to live in.

**92%** | of residents in 2020 had a positive opinion of safety in the city<sup>20, 21</sup>  
↑ **7 pp** in comparison to 2016

**92%** | of residents in 2020 had a positive opinion of cleanliness and tidiness in the city<sup>20, 21</sup>  
↑ **8 pp** in comparison to 2016

In the 2019/2020 academic year, nearly **225,000 people** studied at one of Warsaw's 68 universities or higher education institutions.<sup>9</sup>



Warsaw was ranked 12<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 2020.<sup>23</sup>



Warsaw was ranked 12<sup>th</sup> in the world for **lowest costs of living** according to the Mapping the World's Prices 2019 report.<sup>24</sup>

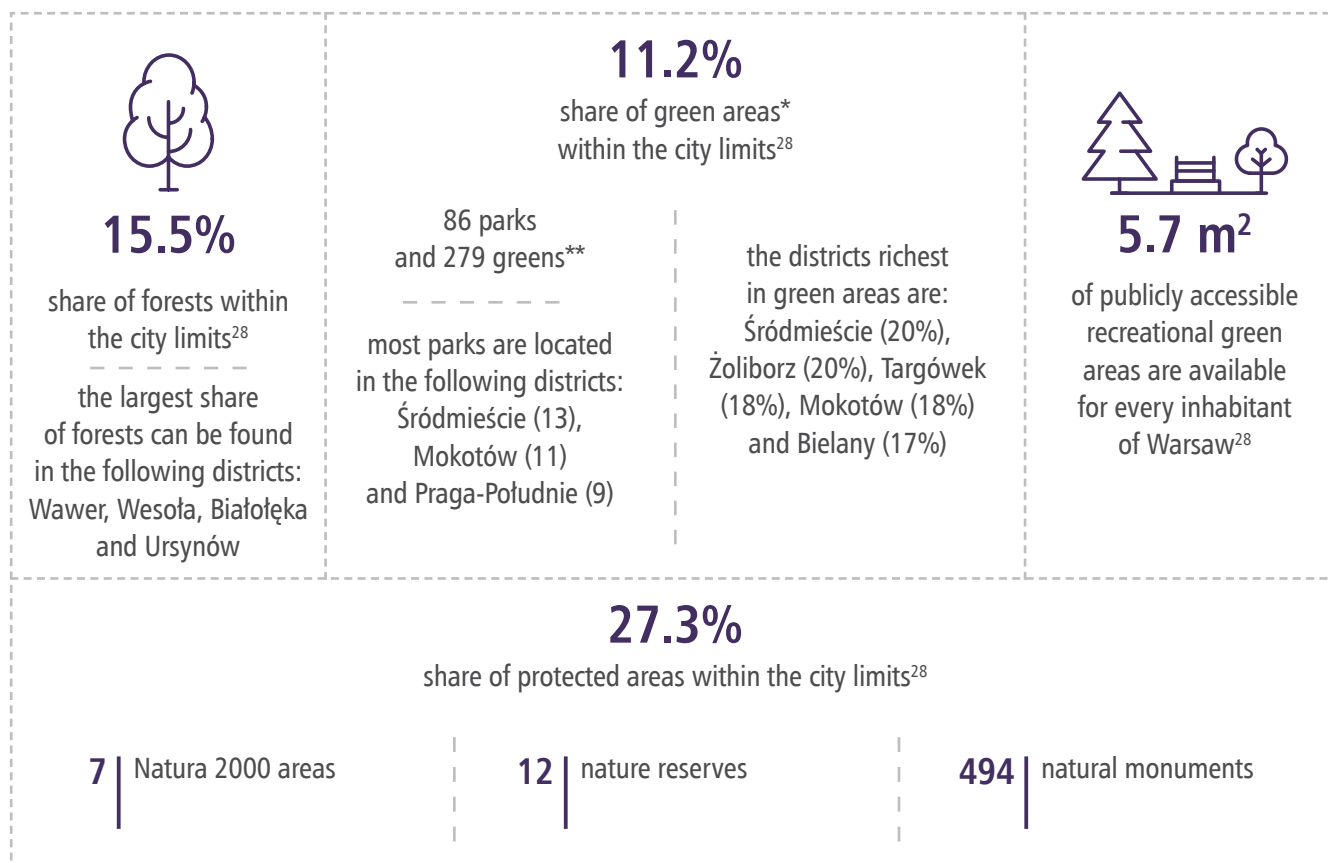


Warsaw came 71<sup>st</sup> in the Resonance World's Best Cities 2021 report, a league table of the world's **best metropolises to live, work, invest in and visit**. Poland's capital was ranked highly in the "safety" category (21) as well as the "product" category (42), which includes the number of tourist attractions, museums and cultural institutions recommended by residents and tourists.<sup>25</sup>



Poland's capital was ranked 54<sup>th</sup> in the IESE Cities in Motion Index 2020, a league table of the world's **smartest cities**. After Prague, Warsaw, is the "smartest" city in Eastern Europe. Poland's capital also took a respectable 8<sup>th</sup> place in the "governance" category and 14<sup>th</sup> place in the "urban planning" category.<sup>26, 27</sup>

## Green Warsaw



\*parks, greens, allotments, educational gardens, and greenery attached to various facilities, as well as untamed, predominantly wooded (not forested) green spaces

\*\*green areas where the City of Warsaw is responsible for maintaining greenery



In Warsaw in 2020, nearly 4,000 trees were planted, shrubs were planted on more than 42,000 m<sup>2</sup> of land and more than 82,000 m<sup>2</sup> of flower meadows were sown on **green areas managed by the city**. More than 202,000 trees and native species shrubs were planted as part of introducing or maintaining afforestation.<sup>29, 30</sup>



Almost 50% of the projects selected for implementation in 2020 as part of the civic budget, an initiative that allows residents to submit ideas for projects that are then implemented using funds from the city budget, were **environmental projects**.<sup>28, 31</sup>



Located on former factory grounds, the **EKOpark in Ursus** received the 2020 Architecture Award of the Mayor of the City of Warsaw in the 'public space design' category for environmentally friendly solutions. Visitors can take advantage of a playground made of ecological materials, an outdoor gym, and an educational nature trail. What is more, insect-friendly flower meadows have been planted in the EKOpark.<sup>32, 33</sup>

**92%**

of residents in 2020 had a positive opinion of greenery in the city<sup>20, 21</sup>

↑ **5 pp** in comparison to 2016

## Transformation of the city centre

2020 is the start of a transformation of the heart of the capital city into a place more friendly for residents and tourists thanks to an initiative of the Mayor of Warsaw.

### Guidelines for the New Centre of Warsaw<sup>34</sup>

- designing attractive and functional green public spaces
- implementing ecological solutions in the design of public spaces
- revitalising streets and squares, which will become friendlier places to spend free time
- ensuring the comfortable movement for pedestrians, cyclists and public transport users



### Selected investments within the New Centre of Warsaw<sup>35-38</sup>



- construction of the so-called Central Square with the Museum of Modern Art in front of the Palace of Culture and Science, a new 'green' meeting place which will include an attractive cultural event programme
- redevelopment of the overly-congested so-called Pięć Rogów Square, which will become a pedestrian-friendly area and a new showcase for the capital
- revitalisation of Gwardia Market Hall, already eagerly-visited by both tourists and locals, in order for it to regain its unique commercial and service-centred feel
- revitalisation of Świętokrzyski Park, where the modernist Nowa Emilia pavilion will be reconstructed under the supervision of the Warsaw Monuments Conservator, with a city orangery and a conference and exhibition space

## The attitude of Varsovians to the development of tourism in 2019<sup>39</sup>

**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

**67%** | of Varsovians believe their everyday life is not disturbed by tourists

**52%** | of Varsovians who live in the vicinity of flats or houses that are rented out to tourists experience daily positive consequences of this; for 48% this has neutral consequences





## 2 Accessibility and tourist accommodation

### Accessibility

#### Air

Approximate direct flight times to Warsaw from selected cities<sup>1, 2, 3</sup>



Chopin Airport – basic data and information for 2020



**5.5 million**

passengers served<sup>4</sup>



**67,649**

flight operations performed<sup>4</sup>



**208**

destinations<sup>4</sup>



**38%**

of Polish air market share<sup>5</sup>

Warsaw Chopin Airport



approx. 10 km

Warsaw centre



**30 minutes**  
bus<sup>6</sup>



**25 minutes**  
Rapid Urban Railway<sup>6</sup>



**20 minutes**  
car/taxi<sup>6</sup>



Only 4.9 million passengers were served by Warsaw Chopin Airport in 2020 in **international traffic** (a decrease of 71.5% compared to 2019). The share of **domestic travel** was 11.2%, that is 0.6 million passengers (down 65.2% compared to 2019). The vast majority of travellers were **scheduled passengers** (68.3%), and almost 3/4 of all flights were in the **Schengen area**.<sup>7</sup>



Warsaw Chopin Airport in 2020 was among an exclusive group of 30 airports in Europe where the **advanced A-CDM (Airport Collaborative Decision Making) system** has been implemented. It allows for the optimisation of activities of cooperating businesses at the airport, which translates into more efficient management of aircraft service time and better use of airport capacity and European airspace.<sup>8</sup>

### Warsaw Modlin Airport – basic data and information for 2020



**0.9 million**

passengers served<sup>9</sup>



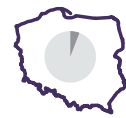
**9,784**

flight operations performed<sup>9</sup>



**48**

destinations<sup>9</sup>



**6%**

of Polish air market share<sup>5</sup>

Warsaw Modlin Airport



**approx. 40 km**

Warsaw centre

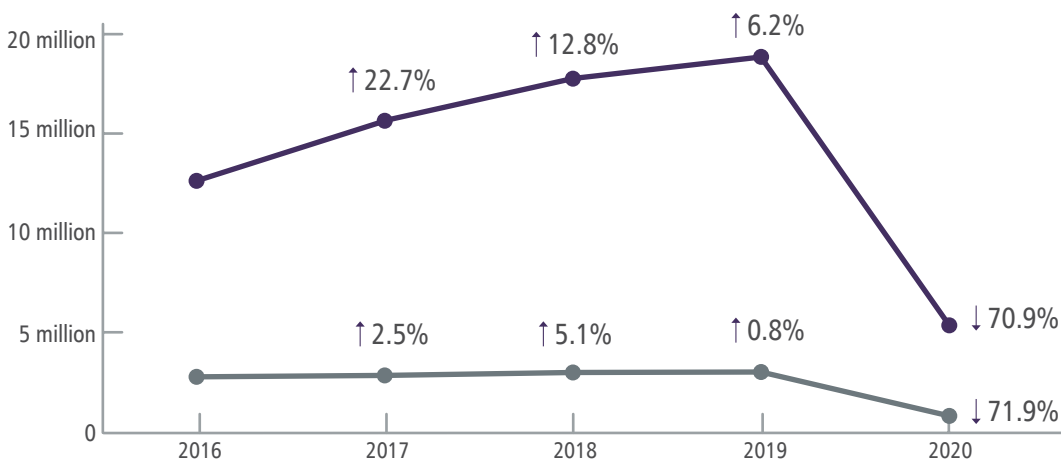


**55 minutes**  
bus<sup>10</sup>



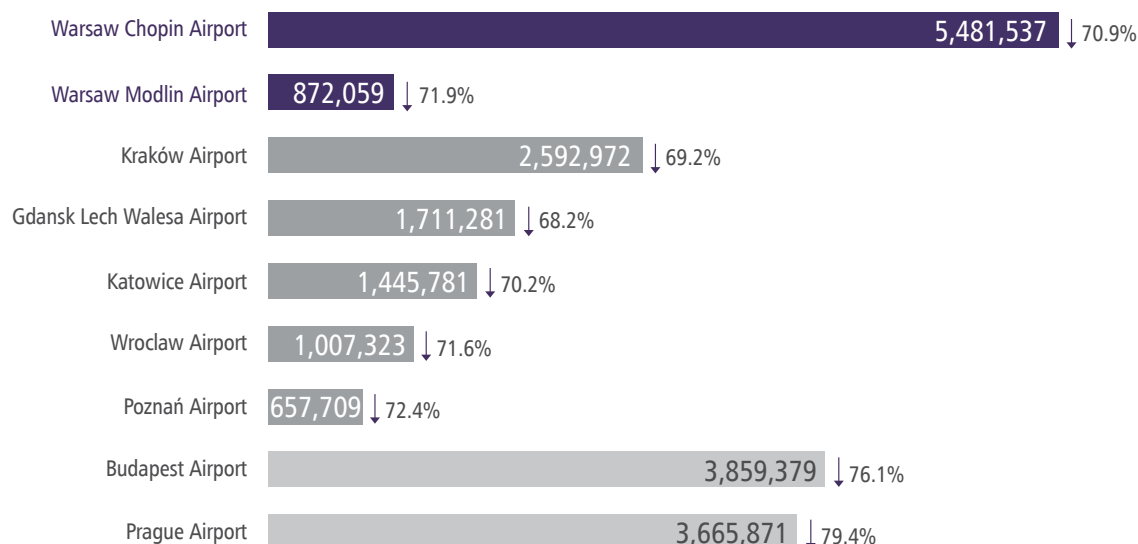
**45 minutes**  
car/taxi<sup>6</sup>

### Warsaw Chopin Airport and Warsaw Modlin Airport – passengers served in 2016-2020 (number and change year on year)<sup>4, 9, 11, 12, 13</sup>



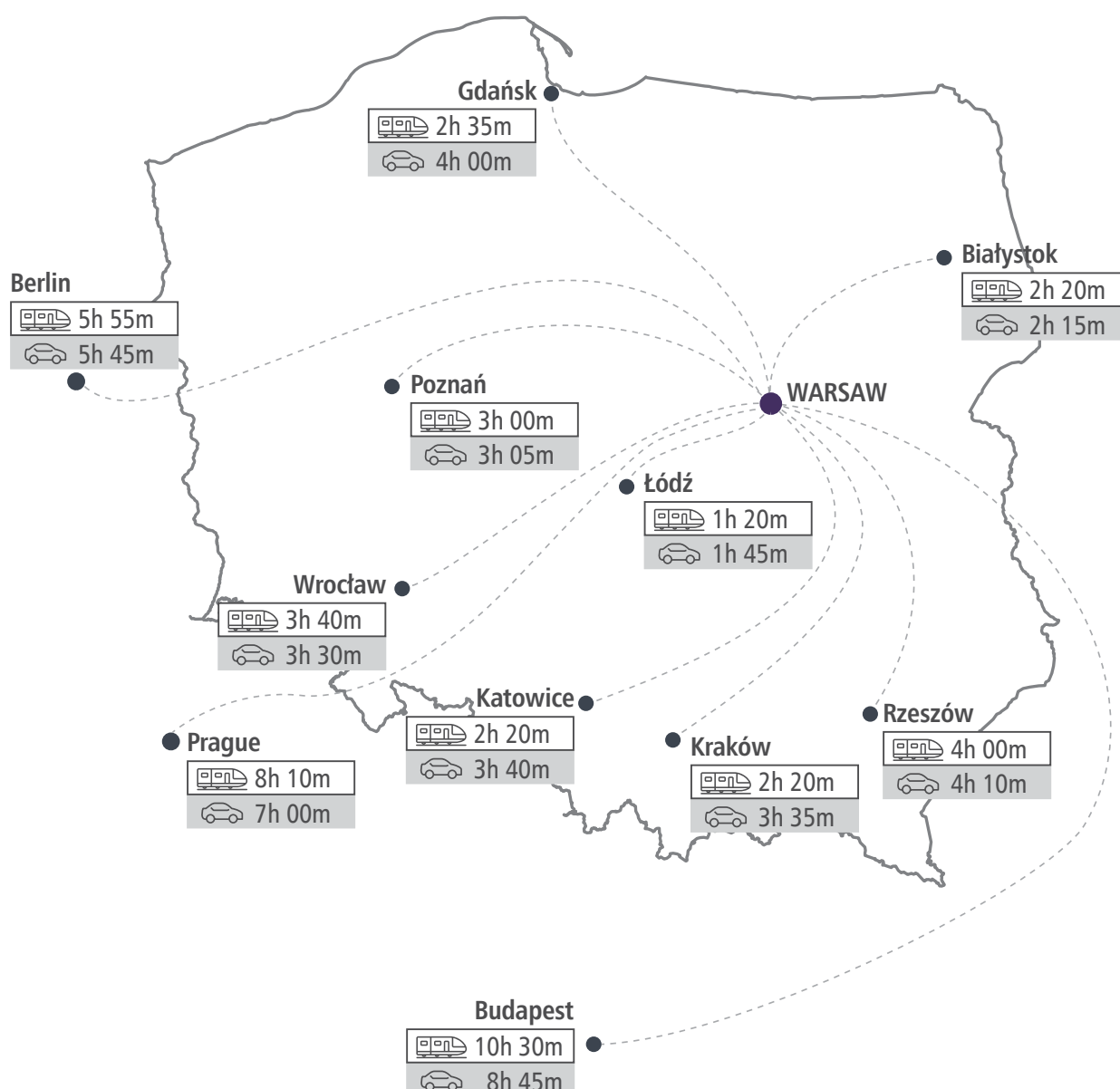
— Warsaw Chopin Airport — Warsaw Modlin Airport

## Warsaw Chopin Airport and Warsaw Modlin Airport in comparison to other selected airports – passengers served in 2020 (number and change in comparison to 2019)<sup>14</sup>



## Rail and road accessibility

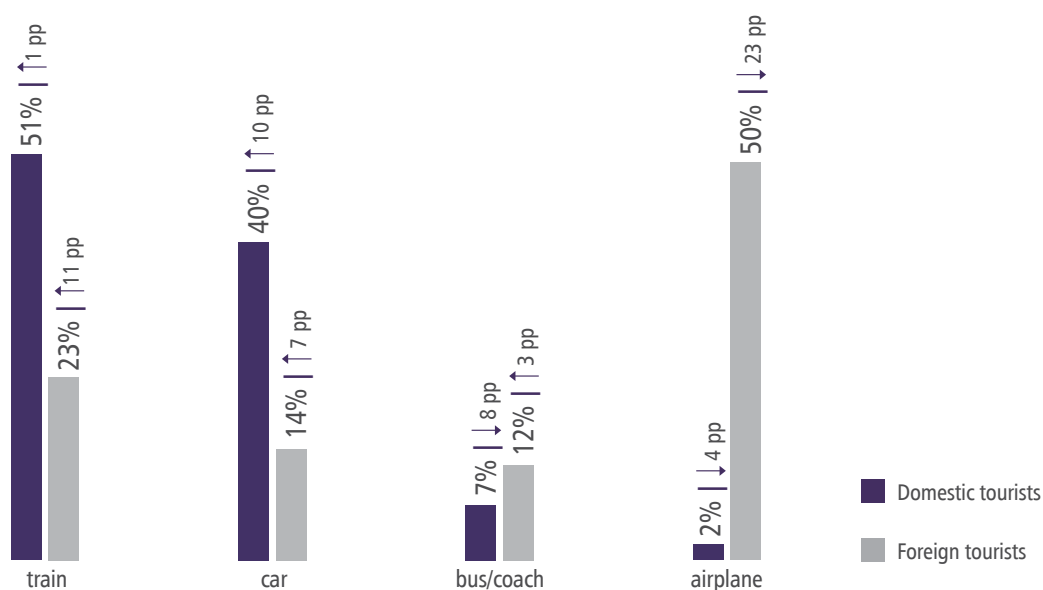
Approximate travel time to Warsaw from selected cities<sup>6, 15</sup>





## Means of transport used by tourists coming to Warsaw in 2020

Means of transport used to travel directly to Warsaw (% share and change compared to 2019\*)<sup>16, 17</sup>



\*change compared to the same period in 2019 (the survey was conducted September-November 2020)

## Public transport



Over  
**726 million**  
passengers used public  
transport in 2020<sup>18</sup>

**↓ 40%**  
in comparison to 2019

### 49% of people travelled by bus<sup>18</sup>

Warsaw is 3<sup>rd</sup> in Europe, following Moscow and London, with the highest number of electric buses. Poland's capital has 160 zero-emission vehicles, which are used, among others, to service the historic Royal Route.<sup>18</sup>

### 23% of people travelled by tram<sup>18</sup>

Almost 60% of junctions in Warsaw are equipped with an automatic system of traffic light changing to green for oncoming trams. This benefits passengers and the environment, as travel time is reduced and electricity consumption decreases.<sup>19</sup>

### 22% of people travelled by metro<sup>18</sup>

3 new stations of the 2<sup>nd</sup> metro line in the Wola district have been commissioned, and Warsaw Metro obtained nearly EUR 87 million for the purchase of 45 modern trains under the EBRD Green Cities programme, which is designed to support sustainable urban transport.<sup>18, 20</sup>

### 6% of people travelled by rail<sup>18</sup>

The Rapid Urban Railway signed a contract for the purchase of 21 modern trains, adapted to the needs of people with disabilities and equipped with a modern passenger information system, free Wi-Fi and USB sockets.<sup>21</sup>

**16 P+R (Park and Ride) car parks** with 4,500 parking spaces and 26 free charging stations for electric vehicles were in use in Warsaw in 2020. Another 3 car parks were planned or under construction (in the districts of Białołęka, Ursynów and Targówek). The new car parks will be environmentally-friendly and easily-accessible for the local community, functioning on renewable energy sources.<sup>18</sup>



## Cycling Warsaw 2020<sup>22-27</sup>



**675 km** | **↑ 182 km**  
of cycling routes | in comparison to 2016

### Warsaw Public Bike Veturilo

Nearly **3.2 million** | **↓ 40%**  
rentals | in comparison  
to 2019

**73%** | of residents had a positive opinion  
of the functioning of Veturilo  
**↑ 11 pp** in comparison to 2016

- over **64,500** new users have made use of the system
- the most popular station continues to be the one located beside **the Copernicus Science Centre**
- users most often rented cycles between **16:00 and 19:00**
- Veturilo accounted for **6.2%** of cycle traffic in Warsaw

- residents and tourists had **5,700** bicycles at their disposal, including **60** child cycles, **45** tandem cycles and **110** electric cycles, available at close to **400** stations
- the Veturilo system is compatible with systems in **neighbouring municipalities** such as Konstancin-Jeziorna, Piaseczno, Pruszków and Marki, bikes rented there can be returned in Warsaw and vice versa

**87%** | of residents in 2020 believed Warsaw  
to be a cycle-friendly city  
**↑ 17 pp** in comparison to 2016

**94%** of tourists in 2020 had a positive opinion  
of public transport\*<sup>16</sup>

\*people who have used this type of service

**93%** | of residents in 2020 had a positive opinion  
of the functioning of public transport  
**↑ 8 pp** in comparison to 2016<sup>26, 27</sup>



Warsaw among the top **cities with the most sustainable public transport** in Europe. The Polish capital city came 4<sup>th</sup> in the Sustainable Mobility Index, put together by UK-based comparison website Uswitch, ahead of Paris (5), Vienna (7) or Berlin (11). One of Warsaw's strengths is its environmentally-friendly fleet of buses.<sup>28</sup>

More than 17,000 **licensed taxis** were on Warsaw's streets in 2020. This is almost 5,600 more than in 2019.<sup>29</sup>



More than 8,200 **electric scooters were available to rent** for both residents and tourists in Warsaw in 2020. This is more than 40% of all rentable e-scooters in Poland. The cost was around EUR 0.11 per minute.<sup>30, 31</sup>



According to Kayak, an online search and price comparison website for flights, accommodation, holiday packages and car rentals, there are currently 50 **car rental companies** in 147 locations in Warsaw.<sup>32</sup>



## Tourist accommodation



**638** tourist accommodation establishments\*<sup>33</sup> | **↓ 25** in comparison to 2019



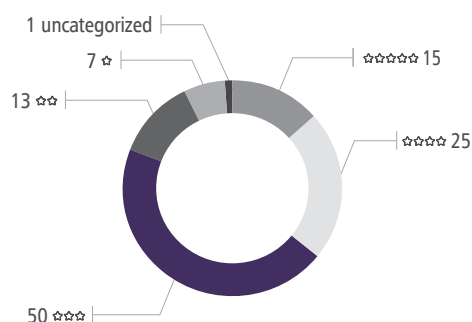
**50,900\*\*** bed places\*<sup>33</sup> | **↑ 844** in comparison to 2019

\*based on data from Warsaw Tourist Office, City of Warsaw and the Polish Ministry of Economic Development, Labour and Technology

\*\*including 100 tent and 80 caravan pitches

### Hotels in 2020 (number and change in comparison to 2019)

#### Number of establishments\*<sup>33</sup>

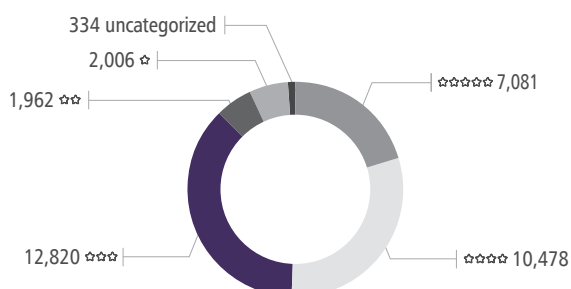


**111** total | **↑ 3** in comparison to 2019

**Note:** Although the number of tourist accommodation establishments in Warsaw declined in 2020, the hotel market saw increases. Warsaw's hotel base increased by 3 establishments and nearly 1,200 beds.

\*based on data from Warsaw Tourist Office and the Polish Ministry of Economic Development, Labour and Technology

#### Number of bed places\*<sup>33</sup>

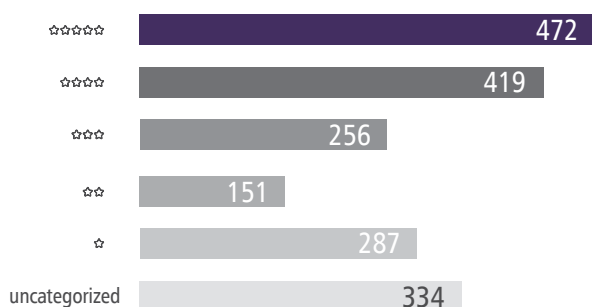


**34,681** total | **↑ 1,197** in comparison to 2019 → **17,799** number of rooms

**Note:** Half of the beds were located in four- and five-star establishments in 2020, and only one in ten hotels were in the two lowest categories.

\*based on data from Warsaw Tourist Office and the Polish Ministry of Economic Development, Labour and Technology

## Average number of bed places\*<sup>33</sup>



320 average | ↓ 2 in comparison to 2019 → 161 average number of rooms in hotel

\*based on data from Warsaw Tourist Office and the Polish Ministry of Economic Development, Labour and Technology

77% of hotel rooms in 2020 operated under the banner of a global, regional or Polish **hotel chain**.<sup>34</sup>



17 hotels scheduled to open in the next few years were **under construction in 2020**, including establishments belonging to chains such as Marriott International, InterContinental Hotels Group, Best Western Hotels & Resorts, and Accor.<sup>35</sup>



In 2020, **7 new hotels were opened** in 6 different districts of Warsaw (Śródmieście, Wola, Ursus, Wawer, Mokotów and Ochota):<sup>36-41</sup>

- Nobu Hotel Warsaw, designed in the spirit of Japanese minimalism and art déco, co-owned by Robert De Niro,
- Hotels located in The Warsaw Hub office complex: Crowne Plaza Warsaw and Holiday Inn Express Warsaw, named the largest Polish hotel investment of 2020,
- Mercure Ursus Station with interiors inspired by railways,
- Best Western Plus Hotel Warsaw, located in a villa district close to the Vistula River,
- Holiday Inn Express Warsaw – Mokotów, created in the spirit of 'work-life balance',
- Hampton by Hilton Warsaw Reduta with interiors in a Scandinavian style, together with Warsaw accents.



As a visual reference to the history of Służewiec Przemysłowy (Industrial Służewiec) neighbourhood, the P4 industrial complex together with the 4-star Vienna House Mokotów Warsaw hotel received the 2020 **Architecture Award of the Mayor of the City of Warsaw** in the 'commercial architecture' category. The hotel's unique atmosphere was created by a combination of steel and concrete, softened by lush greenery, panoramic windows and unique decorations.<sup>42, 43</sup>



Warsaw was ranked 3<sup>rd</sup> in 2020 (after Prague and Budapest) in the ranking of **most attractive markets in CEE and SEE** according to hotel operators as almost 90% expressed a willingness to open new hotels in the capital of Poland.<sup>44</sup>



## Other tourist accommodation establishments in 2020 (number and change in comparison to 2019)\*

### Number of other tourist establishments<sup>33</sup>



### Number of bed places<sup>33</sup>



\*based on data from Warsaw Tourist Office, City of Warsaw and the Polish Ministry of Economic Development, Labour and Technology

\*\*including 100 tent and 80 caravan pitches

## Bed places in tourist accommodation establishments in Warsaw districts in 2020<sup>45</sup>



**Note:** The highest concentration of bed places is observed in the district with the highest number of tourist attractions per km<sup>2</sup>, that is the central district of Śródmieście (see p. 28). This may result in the concentration of tourists in one district of the city, which increases the risk of friction related to overtourism. This phenomenon can be counteracted by dispersing tourist traffic to other districts of Warsaw.

### Number of bed places

- 10,001 - 20,000
- 5,001 - 10,000
- 1,001 - 5,000
- 0 - 1,000

## Users of tourist accommodation establishments\*46



**1,322,926** ↓ **65.3%**  
tourists have used accommodation establishments in 2020 in comparison to 2019

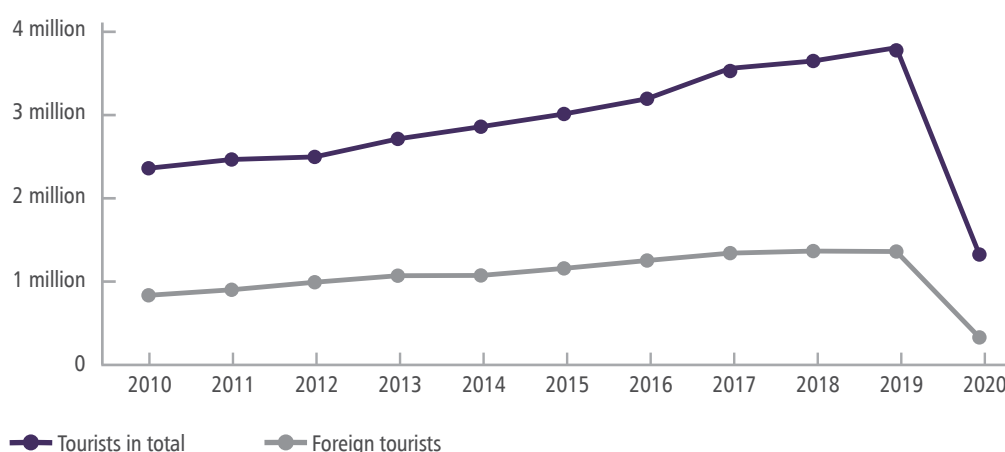
**327,551** ↓ **75.9%**  
foreign tourists have used accommodation establishments in 2020 in comparison to 2019

**Note:** As a result of the COVID-19 pandemic and the introduction of global travel restrictions, the number of tourists using accommodation establishments fell by two-thirds, and for tourist arriving from abroad by as much as three-quarters. A similar decline was noted in the statistics for tourists who were using not only accommodation establishments during their stay, but also other types of accommodation, such as staying with family/friends (see p. 34).

## Foreign tourists using accommodation establishments in 2020 – top 10 by country of residence (number, % share and change compared to 2019)

Germany	39,268	12.0%   ↓ 67.1%
United Kingdom	34,711	10.6%   ↓ 72.4%
Ukraine	25,262	7.7%   ↓ 64.8%
USA	24,819	7.6%   ↓ 82.8%
France	18,708	5.7%   ↓ 69.8%
Russia	15,721	4.8%   ↓ 72.2%
Italy	14,148	4.3%   ↓ 73.9%
Lithuania	9,297	2.8%   ↓ 65.9%
Spain	9,181	2.8%   ↓ 83.2%
Netherlands	8,912	2.7%   ↓ 65.4%

## Tourists using accommodation establishments in 2010-2020



**Note:** Due to the outbreak of the pandemic, a similar number of tourists used Warsaw accommodation establishments in 2020 as almost 20 years ago.

\*data of the Central Statistical Office from establishments with over 10 bed places including imputation from 2017 for establishments that declined to take part in the research

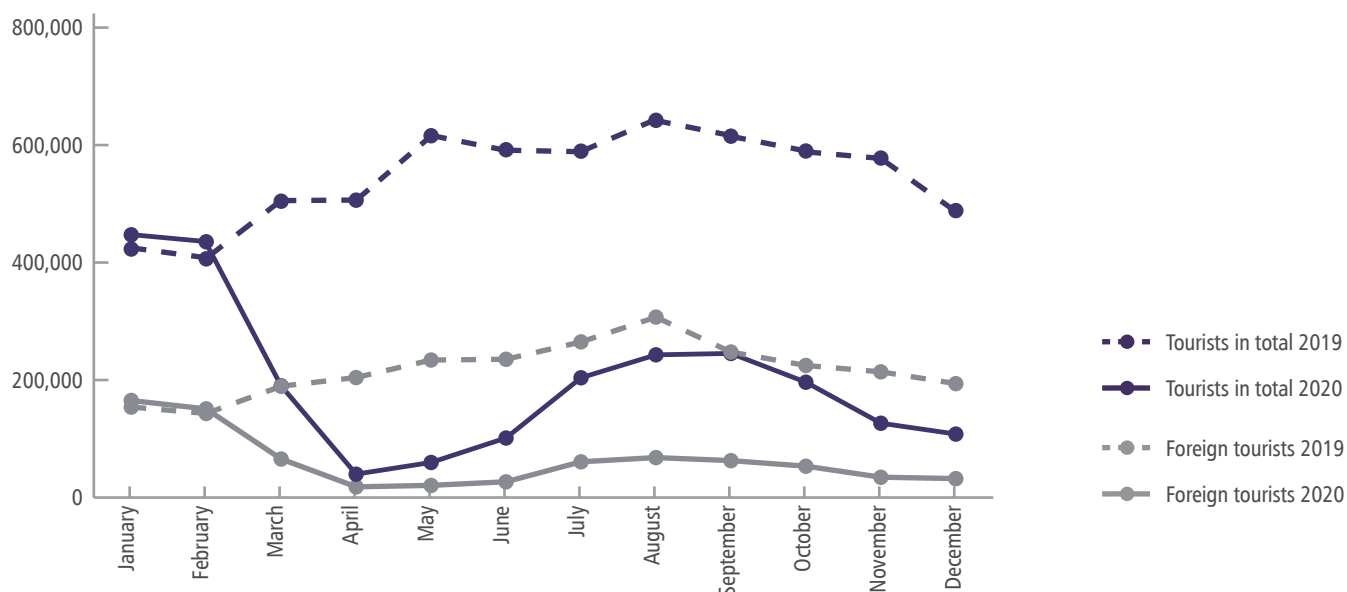
## Nights spent by tourists and their length of stay in accommodation establishments



**2,336,943** ↓ **64.3%**  
nights spent by tourists in accommodation establishments in 2020\*47 in comparison to 2019

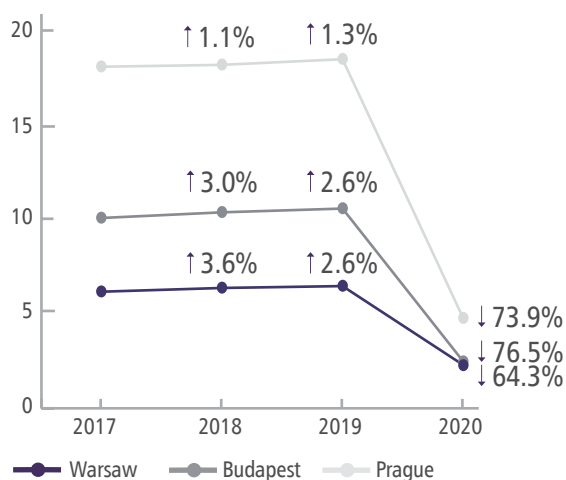
\*data of the Central Statistical Office from establishments with over 10 bed places including imputation for establishments that declined to take part in the research

## Nights spent by tourists in accommodation establishments by month in 2019-2020<sup>\*47</sup>



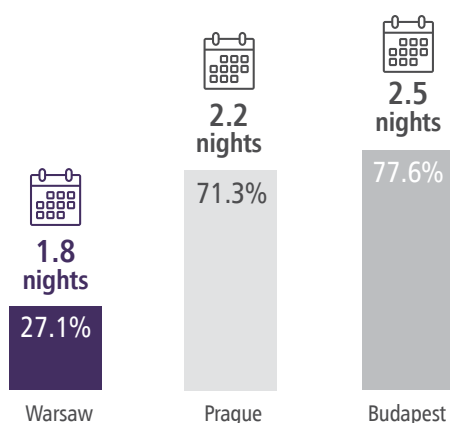
\*data of the Central Statistical Office from establishments with over 10 bed places including imputation for establishments that declined to take part in the research

## Nights spent by tourists in accommodation establishments in 2016-2020 compared to selected cities (number in millions and change year on year)<sup>48, 49</sup>



**Note:** Prior to the COVID-19 pandemic Warsaw recorded significantly fewer nights spent by tourists than its foreign counterparts, but had a higher growth rate. In 2019, it was 27<sup>th</sup> out of 119 European cities in terms of nights spent by tourists, nine places behind Budapest and 18 places behind Prague. This translated to a much lower density of tourist traffic in Warsaw for its population, and thus a lower likelihood of tourist-resident tension as compared to its foreign counterparts.

## Nights spent by tourists and average length of stay in accommodation establishments in 2020 compared to selected cities<sup>48, 49</sup>



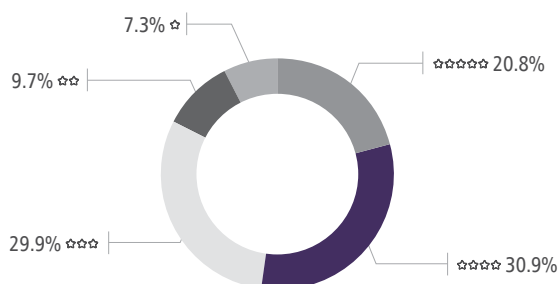
**Note:** Before 2020, Prague and Budapest were among the leaders in Europe in terms of the share of nights spent by foreign tourists in the total number of nights spent. Despite restrictions on international traffic as a result of the COVID-19 pandemic, the situation has not fundamentally changed. In Prague and Budapest, unlike Warsaw, foreign tourists still constituted the vast majority.

## Hotels – rooms rented and nights spent<sup>50, 51</sup>

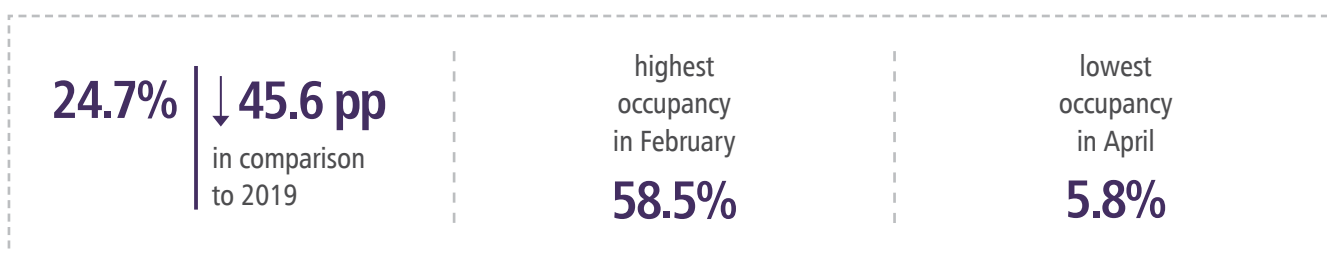


**1,213,040** ↓ **67.3%**  
rooms rented by tourists | in comparison  
in hotels in 2020\* | to 2019

### Rooms rented to tourists in 2020 by hotel category\*:



### Occupancy in hotels in 2020\*



\*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

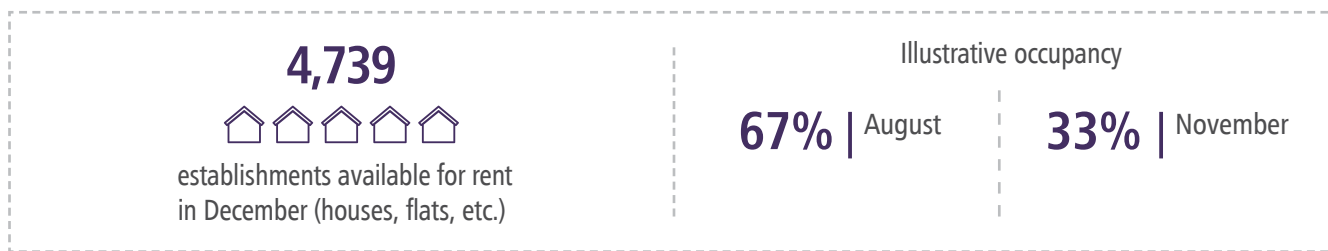
### Nights spent by foreign tourists from selected countries in hotels in 2016-2020



Despite a 74% decline in RevPAR (revenue per available room), Warsaw was one of the **hotel markets** in Central and Eastern Europe in 2020 **least affected by the pandemic**. This was determined by two factors: strong domestic demand and the greater resilience of the Polish economy compared to other countries in the region.



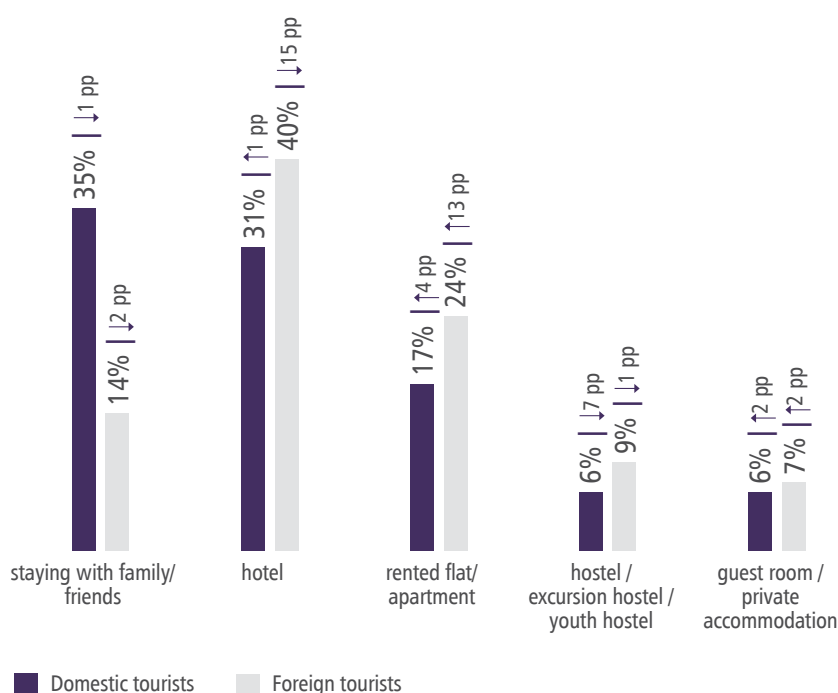
## Rental of accommodation establishments by Airbnb and Vrbo in 2020<sup>52</sup>



96% of tourists who visited Warsaw in 2020 **stayed overnight within the city limits**<sup>16</sup>



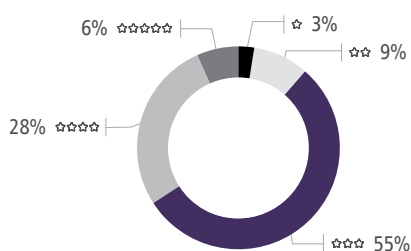
## Main types of tourist accommodation in 2020 (% share and change compared to 2019\*)<sup>16, 17</sup>



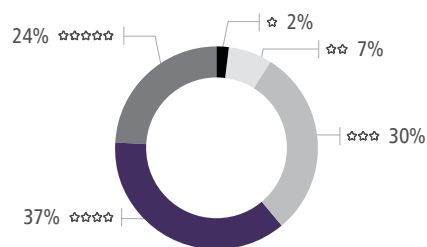
\*change compared to the same period in 2019 (the survey was conducted in 2020 in the months of September-November)

## Standard of hotels used by tourists in 2020<sup>16</sup>

### Domestic tourists



### Foreign tourists



**96%** of tourists in 2020 had a positive opinion of tourist accommodation\*<sup>16</sup>

\*people who have used this type of service

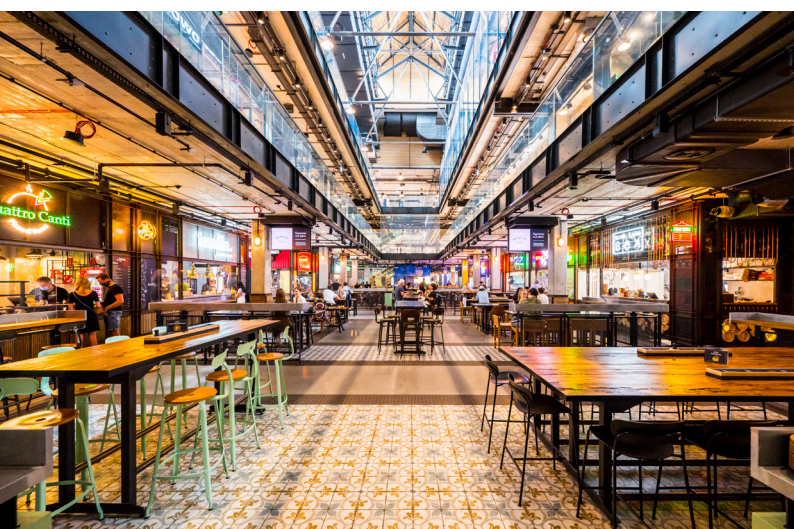


## 3 | Catering establishments and tourist attractions

### Catering establishments

According to Tripadvisor, there were almost **3,500 catering establishments** in Warsaw in January 2021, nearly 500 more than in Budapest and almost 2,000 less than in Prague. The vast majority were restaurants (3,227). Almost one third of the establishments offered European cuisine (1,133). The most numerous were those serving Polish cuisine (830, of which 129 were local), Italian (458) and Asian (291). Many places were vegetarian-friendly (686) and vegan-friendly (301).<sup>1</sup>

### Selected food concepts<sup>2-5</sup>



#### Food Hall in Elektrownia Powiśle

17 restaurants serving dishes from all over the world, 3 bars and 500 seats in the revitalised industrial interior of a former power plant. The shopping mall opened in 2020 in Powiśle in the vicinity of the Vistula boulevards and the Copernicus Science Centre, also houses the Plonoteka organic food market.

#### The restaurant district in Browary Warszawskie

The food hall is being built in a revitalised building in Wola district, in the historic cellars where the beer was aged in barrels. The establishment will be able to accommodate several hundred people, and will be surrounded by restaurants serving dishes from all over the world. The renovated former brewery will also house an open restaurant complex, whose investor is Robert Lewandowski. The restaurant, located on the lowest floor, will have a sporty atmosphere and its décor will include features connected with Poland's most famous footballer.

#### BioBazar

A market with organic food temporarily operating in Mokotów district where you can buy directly from farmers and producers of certified organic food. It is not only a place for shopping, but also for events and meetings, an educational space for anyone interested in ecology and a healthy lifestyle. In 2020, BioBazar celebrated its 10<sup>th</sup> birthday and will soon return to its original location, the revitalised Norblin Factory in Wola district.

## Selected events in the spirit of slow food and street food<sup>6-11</sup>

### Night Market

Poland's first night market for street food was modelled on the similar Asian and Berlin concepts. Thanks to this initiative, the sleeping platforms of the former Warsaw Main Railway Station have been coming to life on summer weekend evenings for the past 5 years. The Night Market atmosphere is set alight by colourful neon lights, the smell of oriental food and club music. As well as food, visitors can find lifestyle stands and an artistic zone there.



### Breakfast Market

On weekends you can enjoy breakfast on the grass with your friends and family in the greens and parks of, amongst others, Żoliborz and Mokotów districts. This is a unique opportunity to try both local and regional specialties as well as dishes from all over the world at the dozens of food stands. The Breakfast Market is also a place where you can take part in culinary, ceramic and art workshops, fitness or yoga classes on the grass and also listen to live music.

### Meals on Wheels

This is Poland's largest gathering of food trucks, which has been taking place on summer weekends for the past 7 years on the fields around the PGE Narodowy Stadium. Street food lovers can choose from dozens of different dishes. Classics such as burgers, hot dogs, fries or Polish zapiekanka pizza lead the way. There are also trucks serving food from distant corners of the world like Mexico, Thailand, China, and even Colombia.



2020 saw the **opening of Nobu Warsaw**, serving a fusion of Japanese cuisine and the tastes of South America. It is the 46<sup>th</sup> restaurant of the luxury Nobu brand in the world with famous Japanese chef Nobu Matsuhisa deciding on the menu.<sup>12</sup>



Der Elefant Restaurant won the 2020 Tripadvisor **Travelers' Choice Award**. Only 10% of establishments, be they hotels, tourist attractions or restaurants, receive this award. The award takes into account reviews submitted by Tripadvisor users, their quality and number and how up-to-date they are.<sup>13</sup>

# 94%

of tourists in 2020 had a positive opinion  
of the catering establishments<sup>\*14</sup>

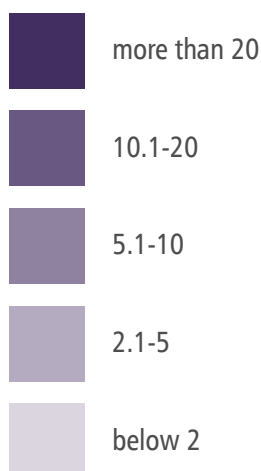
\*people who have used this type of service

# Tourist attractions

Selected tourist attractions in Warsaw districts in 2020<sup>15-28</sup>



Number of attractions per km<sup>2</sup>



**1** The new headquarters of **the Museum of Modern Art** are being built on Plac Defilad. The Museum building will become an open space, giving visitors access to contemporary art works and unique architecture. The museum will also encourage participants of educational events to discuss culture and art freely. The investment is one of the key elements of the redevelopment of the vicinity of the Palace of Culture and Science.

**2** **The Copernicus Science Centre**, one of the most popular of Warsaw tourist attractions, is 10 years old. During the Centre's birthday weekend, visitors could take in the Copernicus Planetarium, talk to Tesla and Einstein, or go on a trip with Maria Skłodowska-Curie. Due to pandemic restrictions, the birthday celebrations were moved into the virtual space.





**3** The **POLIN Museum of the History of Polish Jews** prepared a temporary exhibition entitled "Here is Muranów" presenting the history of the Warsaw neighbourhood of Muranów which in pre-war times was inhabited by the largest Jewish community in Europe. Visitors had the opportunity to see what the bustling Nalewki Street looked like, learn the dramatic fate of the Jews imprisoned in the ghetto which was set up in Muranów, amongst others, and see architectural plans of the modernist housing estate that was built here after the war.

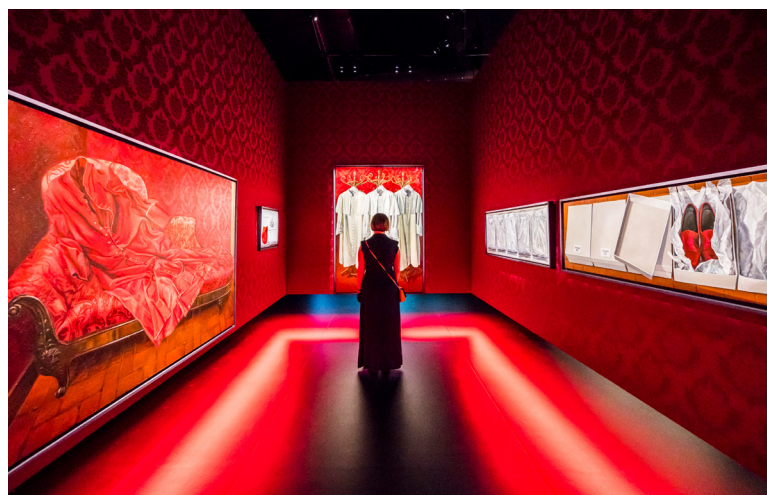
**4** The **Museum of John Paul II and Primate Wyszyński** in Wilanów district opened its doors to visitors. Located in the ring surrounding the dome of the Temple of Divine Providence, the multimedia exhibition tells the story of the life of the namesakes of the museum, their impact on the fate of the Church and Poland, and their contribution to the overthrow of communism.



**5** Ancient works of art have returned to the **National Museum in Warsaw** for good. The largest Gallery of Ancient Art in Poland was reopened with 1,800 exhibits from Egypt, the Middle East, Greece and Rome, including a gold bull's head mask from Iran, a portrait of a young boy from the Faiyum Oasis in Egypt and a Book of the Dead hieroglyph papyrus.

**6** Two works by world-renowned Polish artist Magdalena Abakanowicz were unveiled in **Bródno Sculpture Park**. Zinaxin and Dolacin are two large human-like figures walking in the same direction, and are considered characteristic of the sculptor's work. The temporary exhibition in the public space of Warsaw's Targówek district was part of the celebrations of the artist's 90<sup>th</sup> birthday.

**7** A block of flats in Praga-Północ district now has a **mural illustrating the history of that part of Warsaw which is on the right bank of the Vistula**. The mural motif is the former Pachulski and Domański market, which thanks to its unique and neighbourly atmosphere, is still well remembered by residents of the district. The mural is an abstract geometric design, inspired by an archival photograph of a bird's eye view of the market stalls.



**8** The **Old Town** celebrated its 40<sup>th</sup> anniversary of being inscribed on the UNESCO World Heritage List. Almost 90% of it was destroyed during the Warsaw Uprising and later carefully rebuilt by Varsovians themselves. The Old Town is an incredible example of the complete reconstruction of a historical complex and a symbol of the rebirth of Polish culture and national identity.



## Selected tourist attractions in the Warsaw metropolitan area in 2020<sup>29-34</sup>

**1** One of the largest and most treasured examples of wooden architecture in Poland has been revitalised and now houses an orthopaedic and surgical clinic providing services in the field of medical tourism. Located in the town of Otwock, **the former Abram Gurewicz sanatorium** is an example of Swiss-inspired holiday and spa architecture. The houses that sprouted up in this area at the end of the 19<sup>th</sup> century, richly decorated with lace details and situated in the forest by the Świder River, were jokingly called "Świdermajer" by the poet Konstanty Ildefons Gałczyński, a play on the words "Świder" and "Biedermeier". Almost 200 of them are under the protection of the conservator of historical monuments.



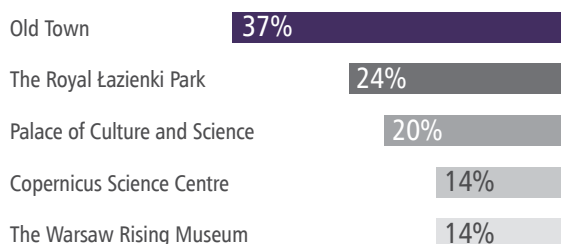
**2** **The Józef Piłsudski Museum** was officially opened during the 100<sup>th</sup> anniversary celebrations of the Battle of Warsaw. Located in the surroundings of the period villas in the historic area of the town of Sulejówek, the Museum presents events from the life of Poland's Chief of State and independence activist from the turn of the 19<sup>th</sup> century. More than 1,000 exhibits and Piłsudski memorabilia, together with replicas, models and multimedia exhibits take us through the life of Piłsudski.

**3** Nature lovers can take a walk through **Kampinos National Park** along the new tourist trail on the site of the former Polish Atomic Command Headquarters. This 2-kilometre route leads along a wooden footbridge, amongst others. It bisects Łuzowa Hill, a hibernation spot for bats, with its greatest attraction being a mural of a brown long-eared bat.

**4** The largest indoor water park in Europe was built 50 km from the centre of Warsaw. **Suntago Water World** offers water lovers 32 slides and 18 pools with a total area of 3,500 m<sup>2</sup>. For those looking to relax there are 10 saunas mimicking different parts of the world and a wellness and spa zone. The tropical feel of the water world has been created using 700 palm trees imported from Florida, Malaysia and Costa Rica.

## Top Warsaw attractions in 2020 according to tourists<sup>\*14</sup>

### Domestic tourists



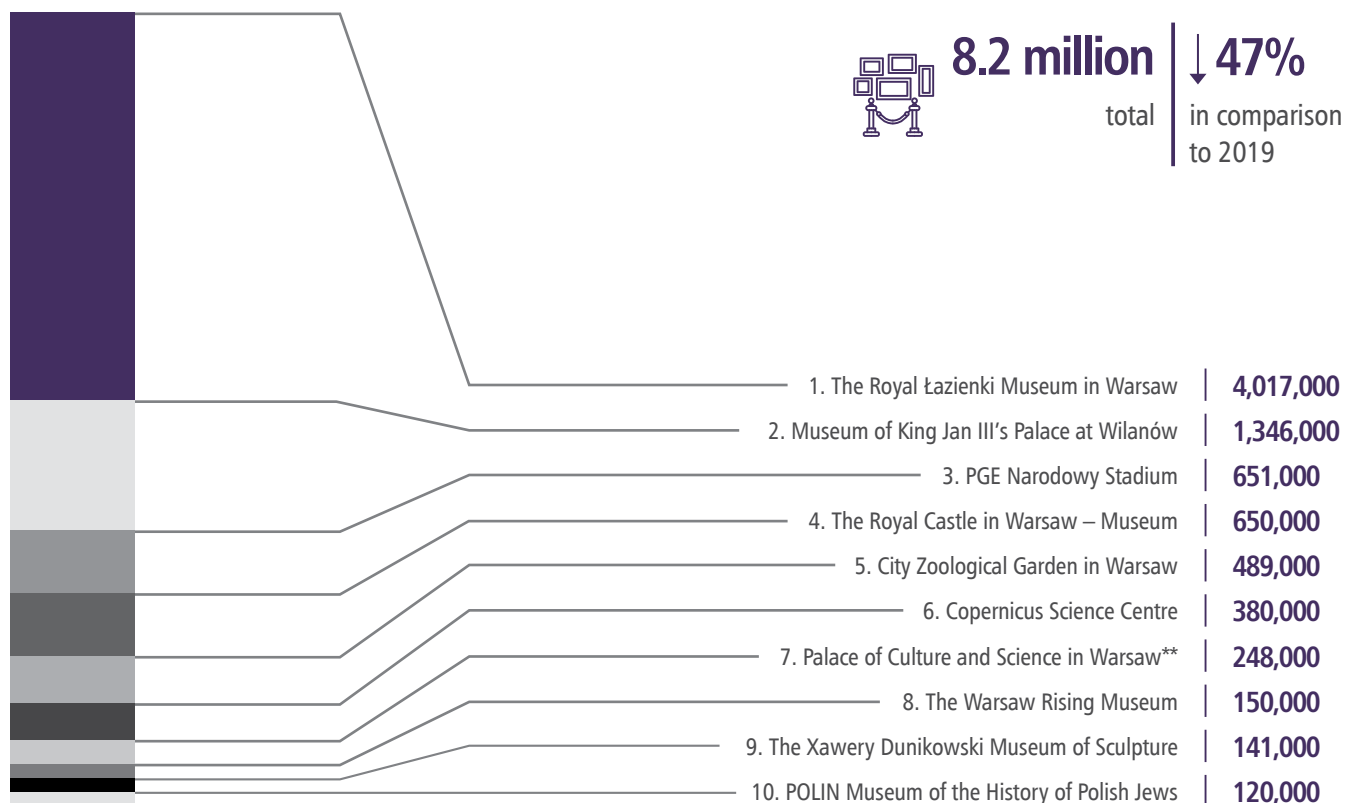
### Foreign tourists



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



## The most popular Warsaw attractions among residents and tourists – attendance in 2020<sup>\*35-44</sup>

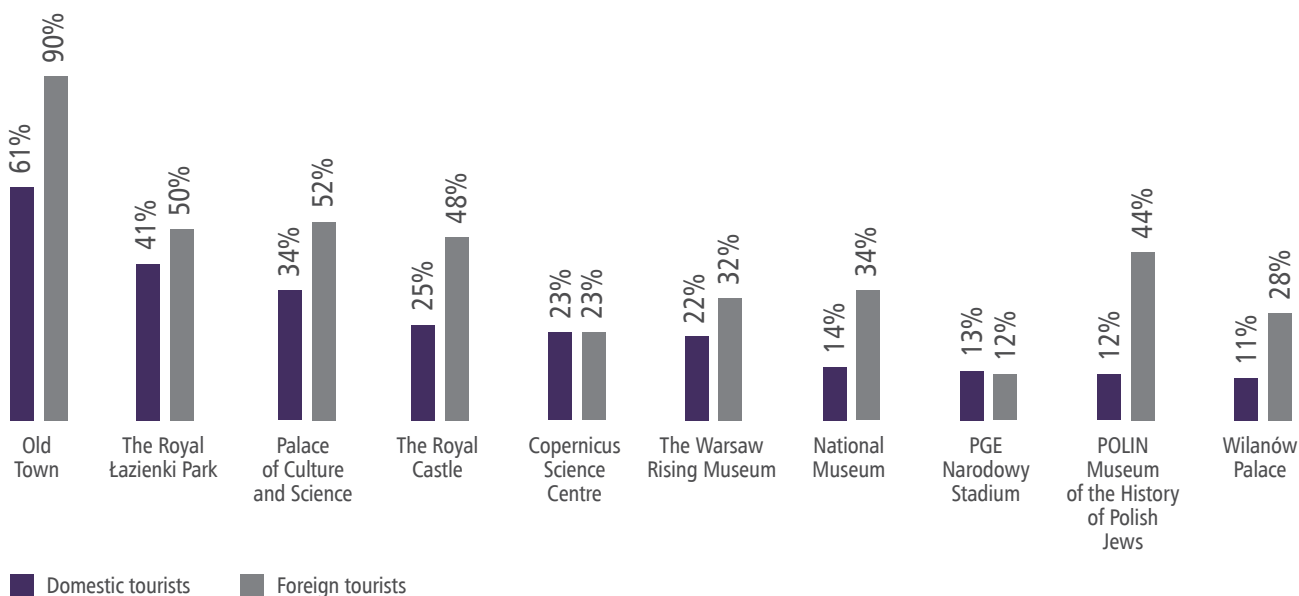


\*approximate data or rounded up to the nearest thousand

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

**Note:** The drop in attendance at Warsaw's most popular attractions was much lower than the drop in the number of people who visited the capital in 2020 (see p. 34). This could be indicative of the strong interest of residents in city attractions despite the COVID-19 pandemic.

## Main attractions in Warsaw visited by tourists in 2020<sup>\*14</sup>



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

## Selected sports facilities in Warsaw in 2018<sup>45, 46</sup>

stadiums, pitches	180
tennis courts	94
swimming pools	56
ice rinks	16
skateparks	15
outdoor gyms	308

## Selected cultural facilities in Warsaw in 2019<sup>45</sup>

cinemas	30
theatres and music institutions	37
museums (including affiliates and branches)	69
art galleries	44

## Cultural events in Warsaw in 2020<sup>47</sup>

Over 230 artists and 2.6 million spectators attended cultural events organised during the pandemic (physical and online) by **Stołeczna Estrada**.

The Chopin Concerts at the Royal Łazienki Park, dating back over 60 years, moved online. The artists gave recitals transmitted online from the historic interiors of the Orangery and the Palace on the Isle. A sound system was also installed allowing visitors to enjoy Chopin's music while strolling around in the park.



The extremely popular Multimedia Fountain Park shows took on a new format. Inspired by the annual performances, the legends of Warsaw were presented by some of Poland's best-known actors online – Dorota Stalińska, Zbigniew Zamachowski and Adam Bauman – accompanied by archival recordings of the shows.

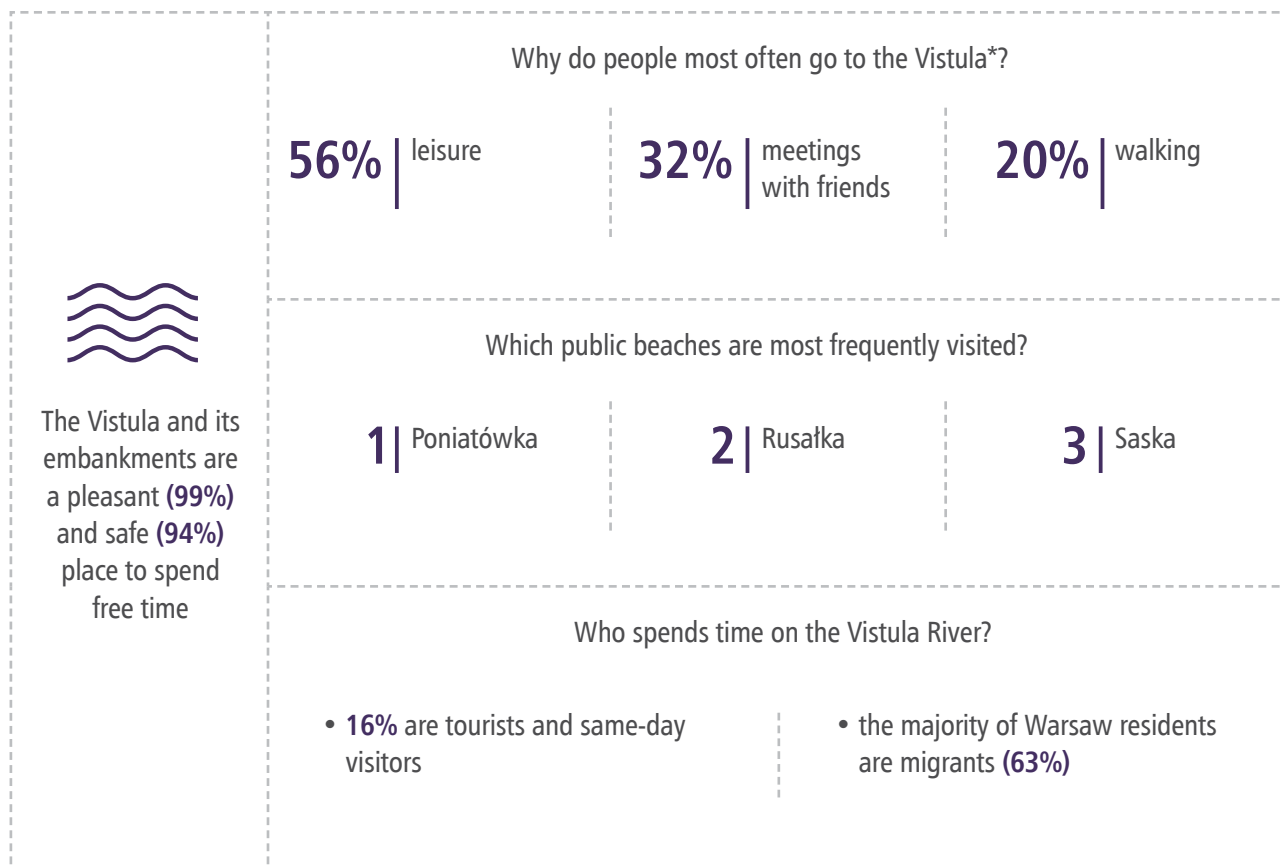
**95%** of tourists in 2020 had a positive opinion of the cultural attractions on offer<sup>\*14</sup>

**91%** of tourists in 2020 had a positive opinion of the recreational and sporting facilities on offer<sup>\*14</sup>

<sup>\*</sup>people who have used this type of service

## Warsaw's Vistula River

The Vistula River through the eyes of its users in 2019<sup>48</sup>



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

2020 was an ECO year for the Vistula!<sup>49, 50</sup>



Opening of the "Kamień" Education Pavilion by the Gdański Bridge on the right bank of the river, a modern ecological education and local activity centre. The pavilion is shaped like an erratic boulder, and its unique location makes it possible to organise field lessons in the nearby meadow or walks taking in the fauna and flora of the Vistula.

Workshops and lectures about zero waste, upcycling and recycling as part of the Vistula District ecological "odŻYJ rzEKO" (Eco River Revival) campaign.

Free cruises on traditional boats, sailing boats and catamarans, together with local studies, ecological and ornithological activities.

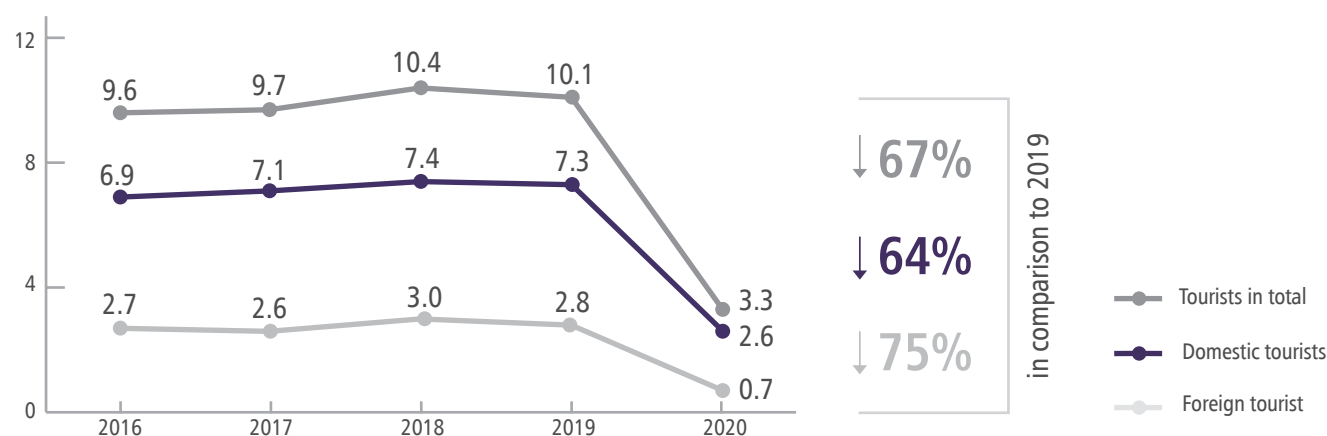




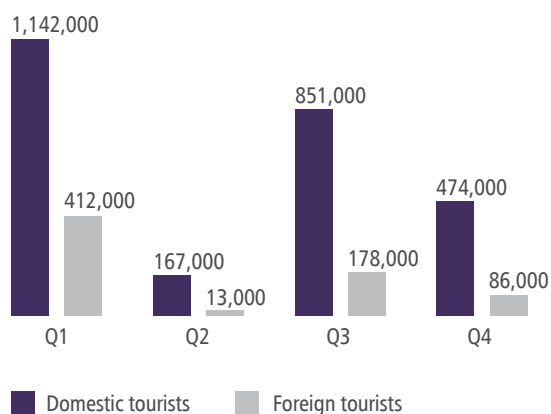
# 4 | Tourist traffic

## Estimation of the size of tourist traffic in Warsaw

Estimation of tourist arrivals in 2016-2020 (number in millions and change compared to 2019)<sup>1, 2</sup>



## Estimation of tourist arrivals in 2020 by quarter<sup>3</sup>

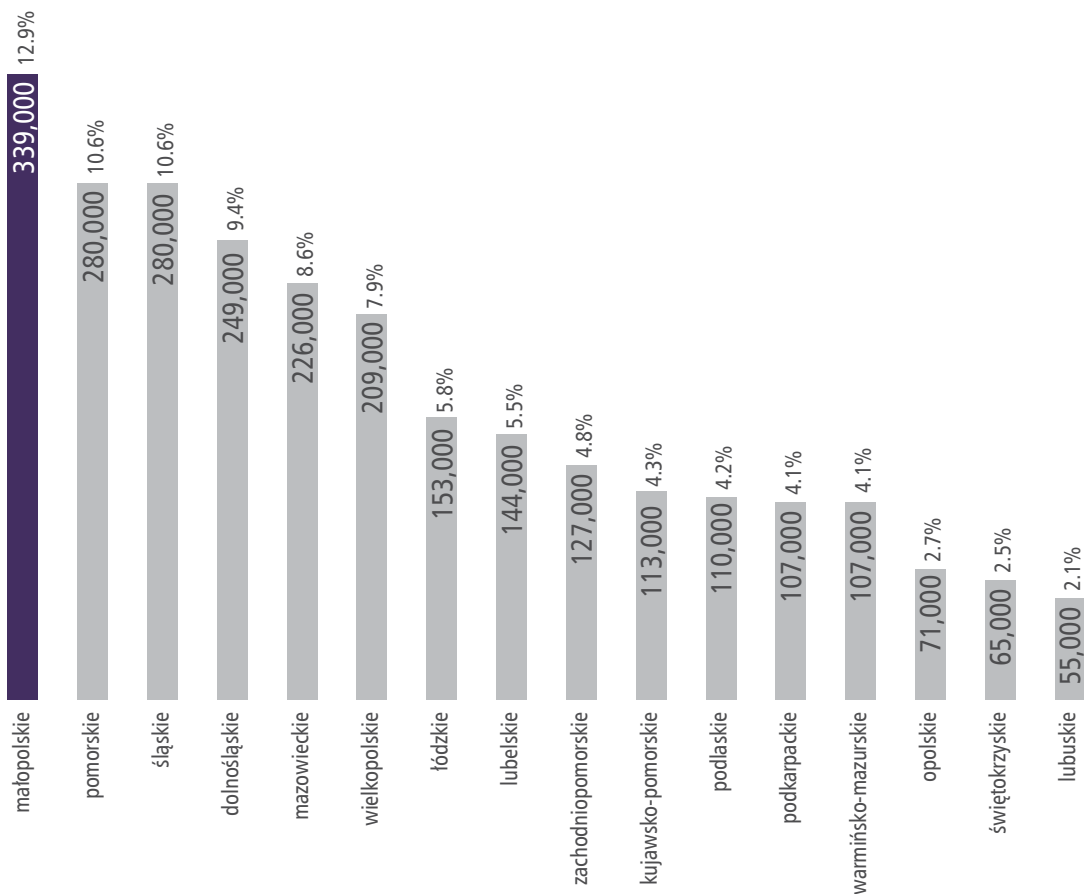


**Note:** The COVID-19 pandemic outbreak resulted in a slump in tourist traffic in the second quarter of 2020. There was a rebound in the summer months due to the loosening of epidemic restrictions (especially for domestic tourists), but by the end of the year – following the second wave of the pandemic – tourist traffic had once again declined significantly.

## Estimation of tourist arrivals by country in 2020 (number and % share)<sup>2</sup>

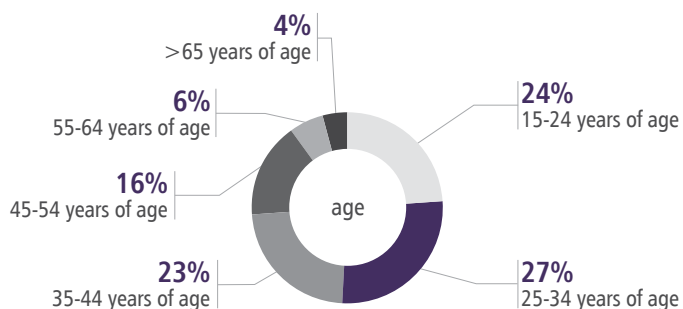


## Estimation of arrivals of domestic tourists by voivodship in 2020 (number and % share)<sup>3</sup>

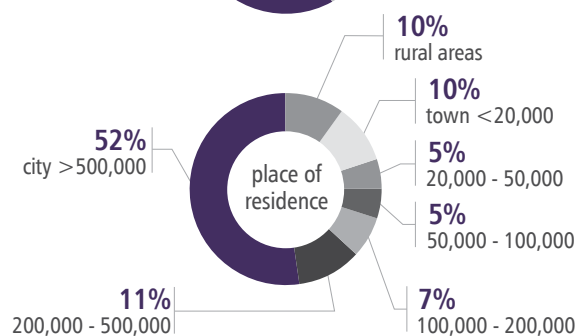
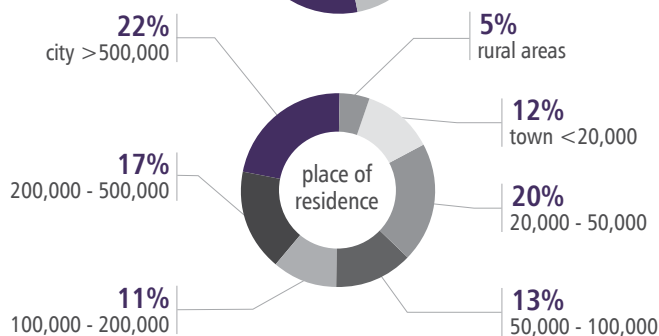
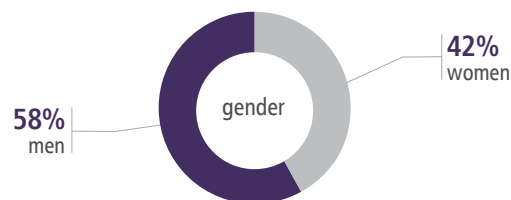
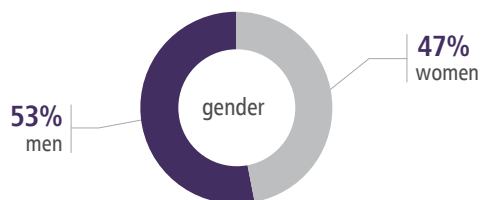
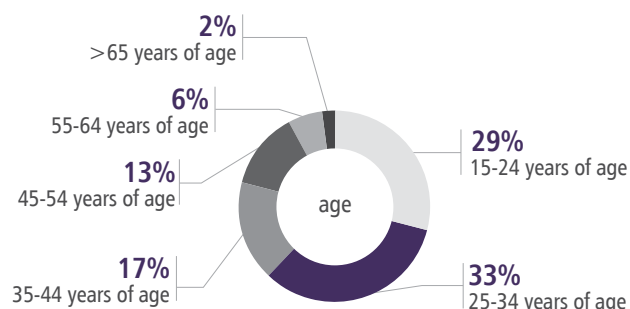


## Profile of tourists visiting Warsaw in 2020<sup>4</sup>

### Domestic tourists



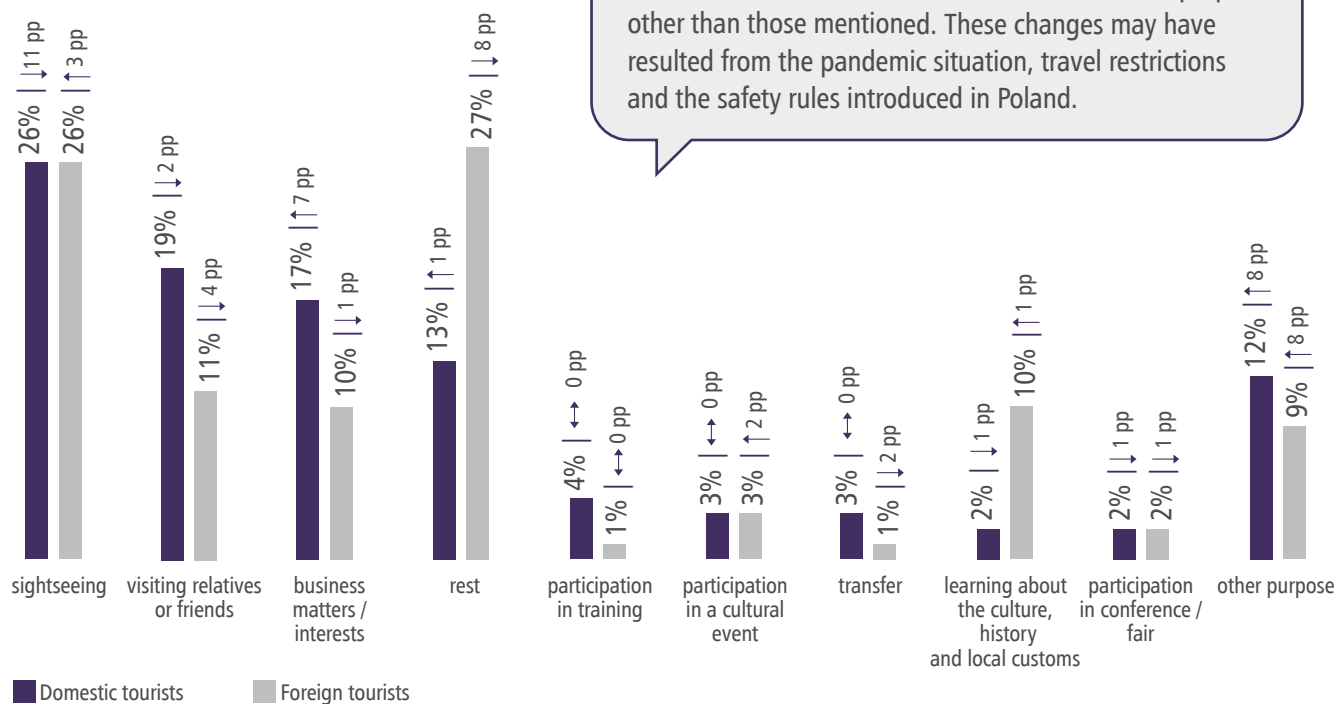
### Foreign tourists



# Characteristics of tourists' stay in Warsaw

## Main purpose of visit to Warsaw in 2020 (% share and change compared to 2019)\*4, 5

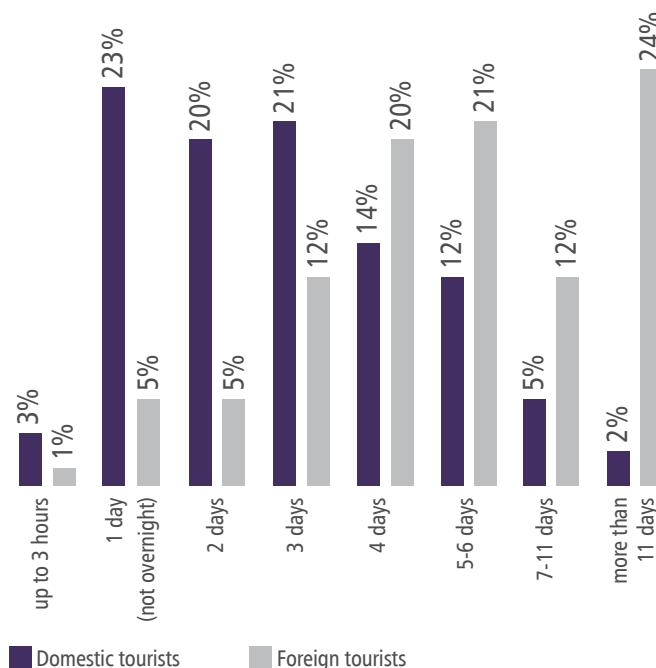
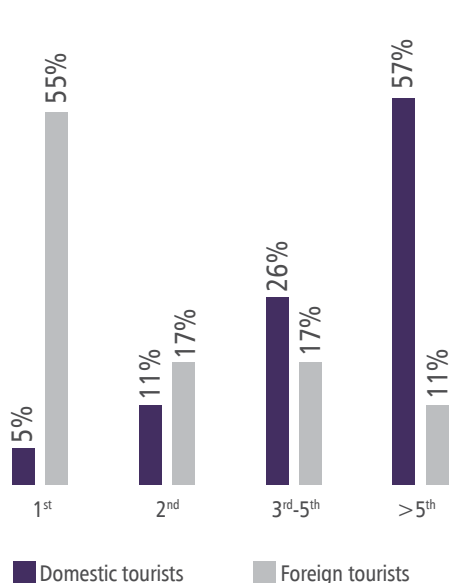
**Note:** In 2020, the structure of the purpose of visits changed. Domestic tourists came to Warsaw less often than last year for sightseeing, and more often for business or purposes other than those mentioned. However, among foreign tourists, fewer came to relax or visit relatives or friends, and more – as in the case of Poles – for purposes other than those mentioned. These changes may have resulted from the pandemic situation, travel restrictions and the safety rules introduced in Poland.



\*change compared to the same period in 2019 (the survey was conducted in 2020 in the months of September-November)

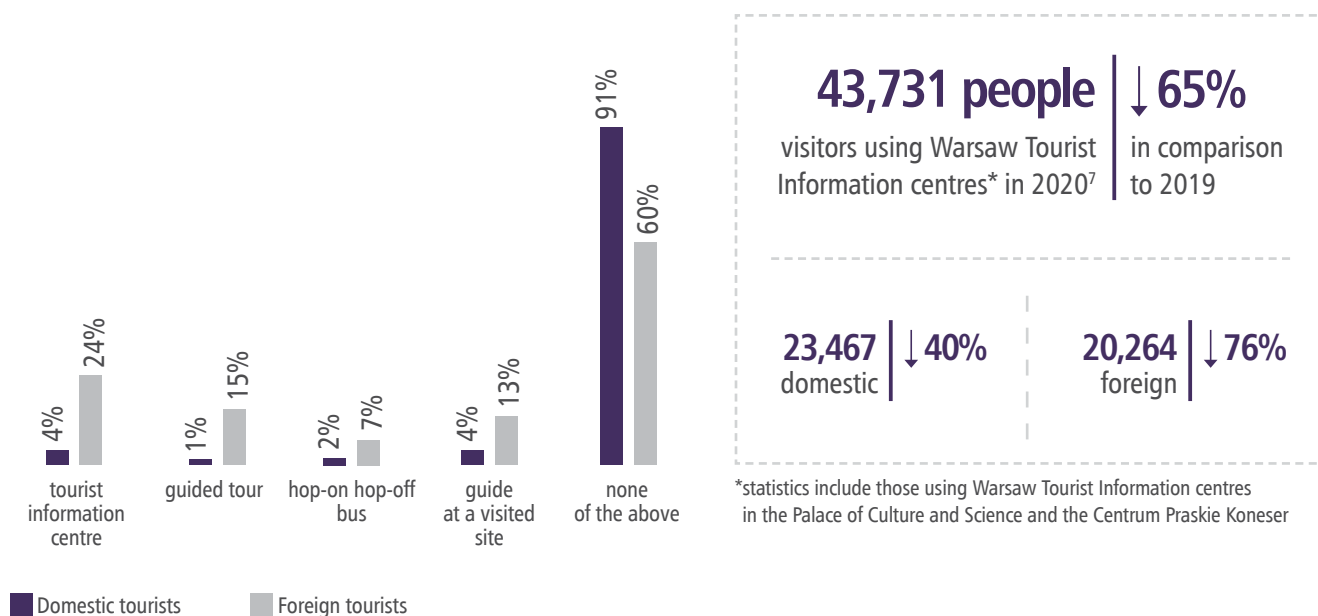
## Which was the current visit of tourists visiting Warsaw in 2020?4

## Length of stay in Warsaw in 20204

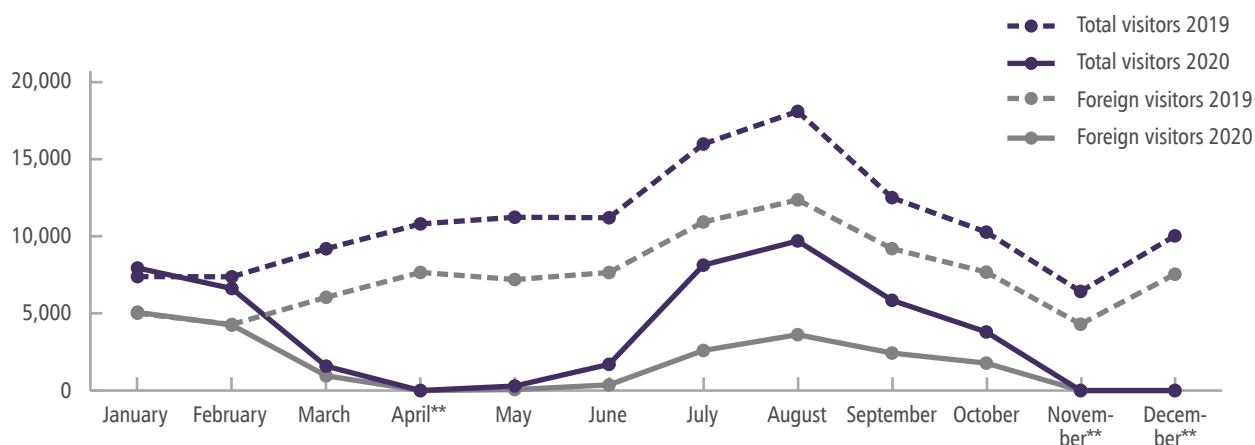




## Use of selected local tourist services during stay in Warsaw in 2020<sup>4</sup>



## Users of Warsaw Tourist Information centres\* by month in 2019-2020<sup>7</sup>

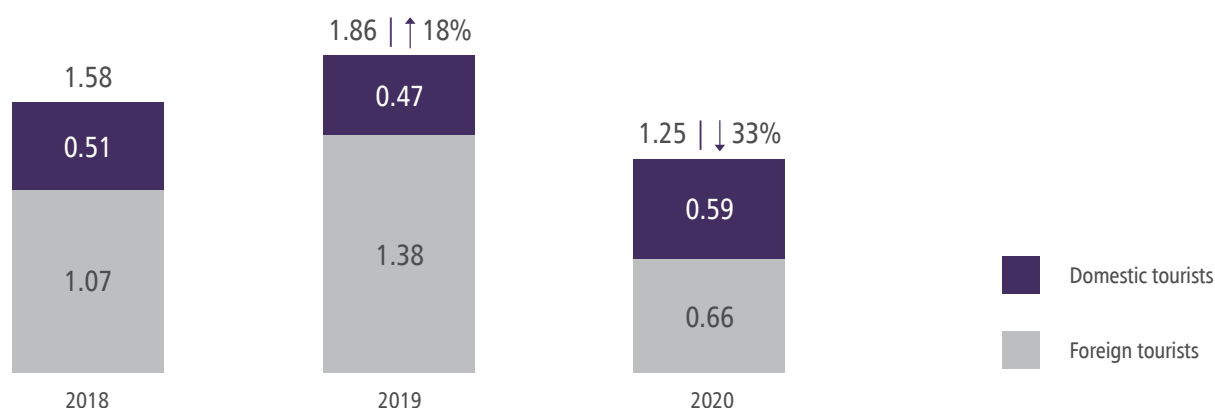




# 5 | Tourist spending and the impact of tourism on the city's economy

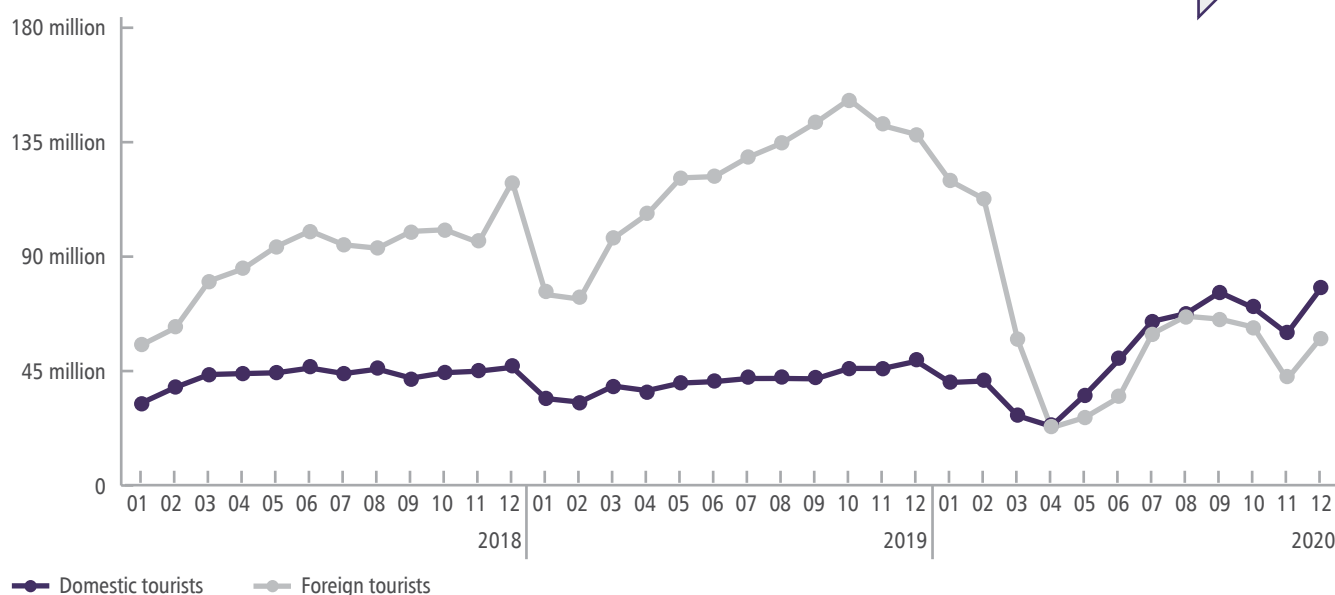
## Estimated tourist spending in Warsaw<sup>1</sup>

Estimated tourist spending in 2018-2020 (in EUR billions and change year on year)



## Estimated tourist spending in 2018-2020 by month

**Note:** Monthly tourist expenditure amounted to approximately EUR 130 million. Most was spent in December and in the summer and autumn months. The sharp decline in spending in March and April 2020 most likely resulted from the introduction of the first restrictions caused by the spread of COVID-19 worldwide.

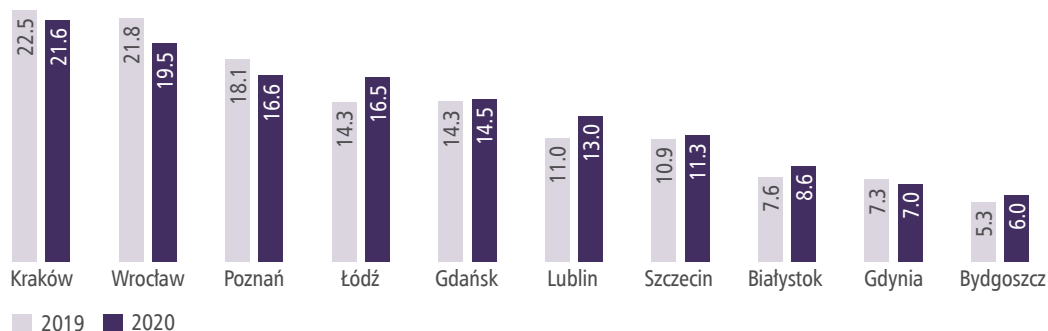


Broken down by days of the week, in 2020 **average spending** by domestic tourists on weekdays was similar. Less was spent on Saturdays and the lowest spending was recorded on Sundays. Foreigners spent most on Fridays and Saturdays, and the least – like Poles – on Sundays.



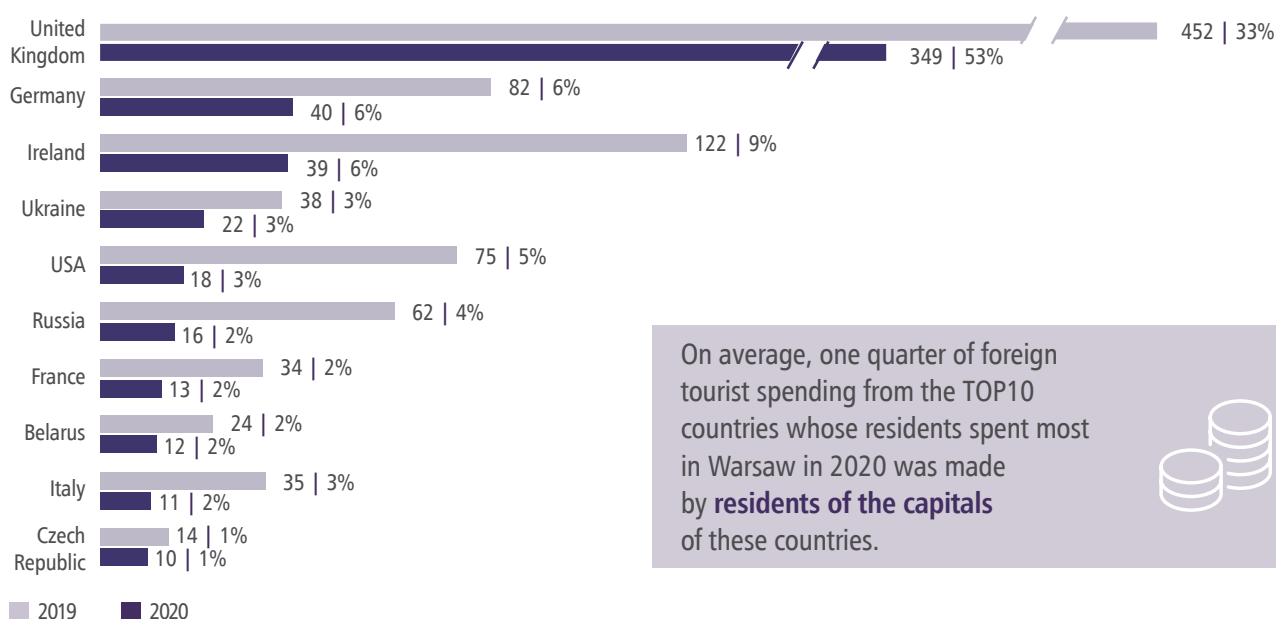


## Estimated expenditure of domestic tourists in 2019-2020 – TOP10 by place of residence\* (in EUR millions)



\*the selection of cities is based on the amount of tourists' expenses in 2020

## Estimated expenditure of foreign tourists in 2019-2020 – TOP10 by country of residence\* (number in EUR millions and share in total expenditure of foreign tourists)

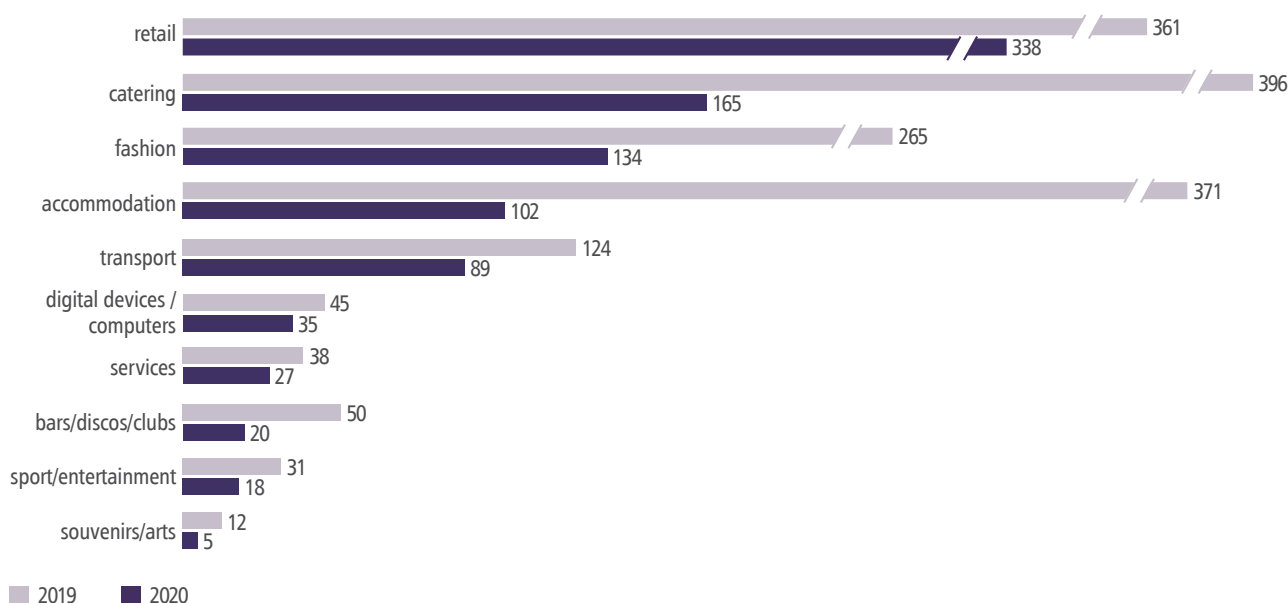


On average, one quarter of foreign tourist spending from the TOP10 countries whose residents spent most in Warsaw in 2020 was made by **residents of the capitals** of these countries.

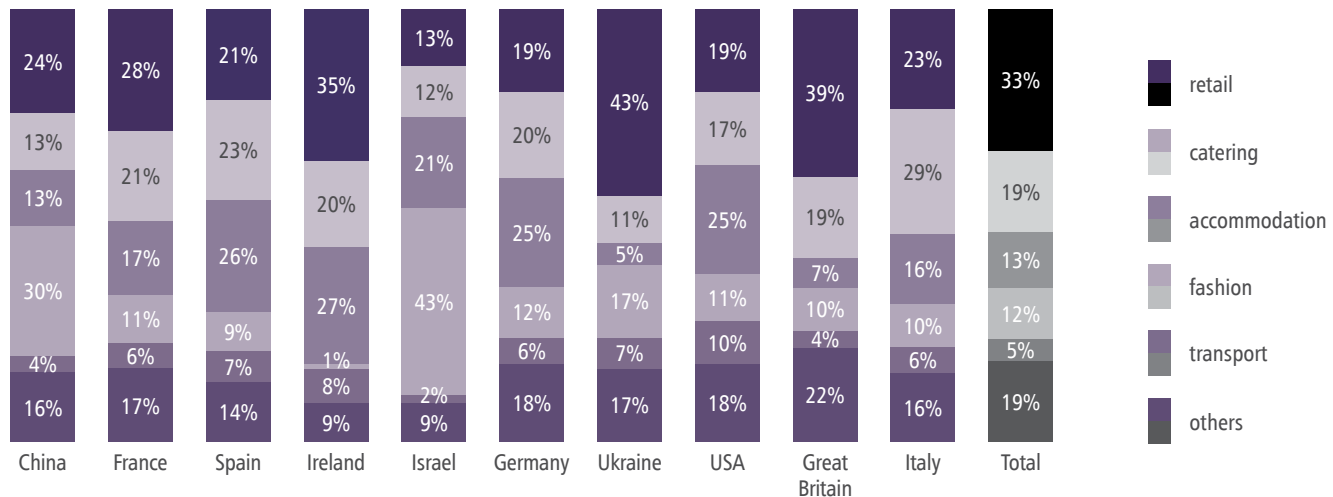


\*the selection of countries is based on the amount of tourists' expenses in 2020

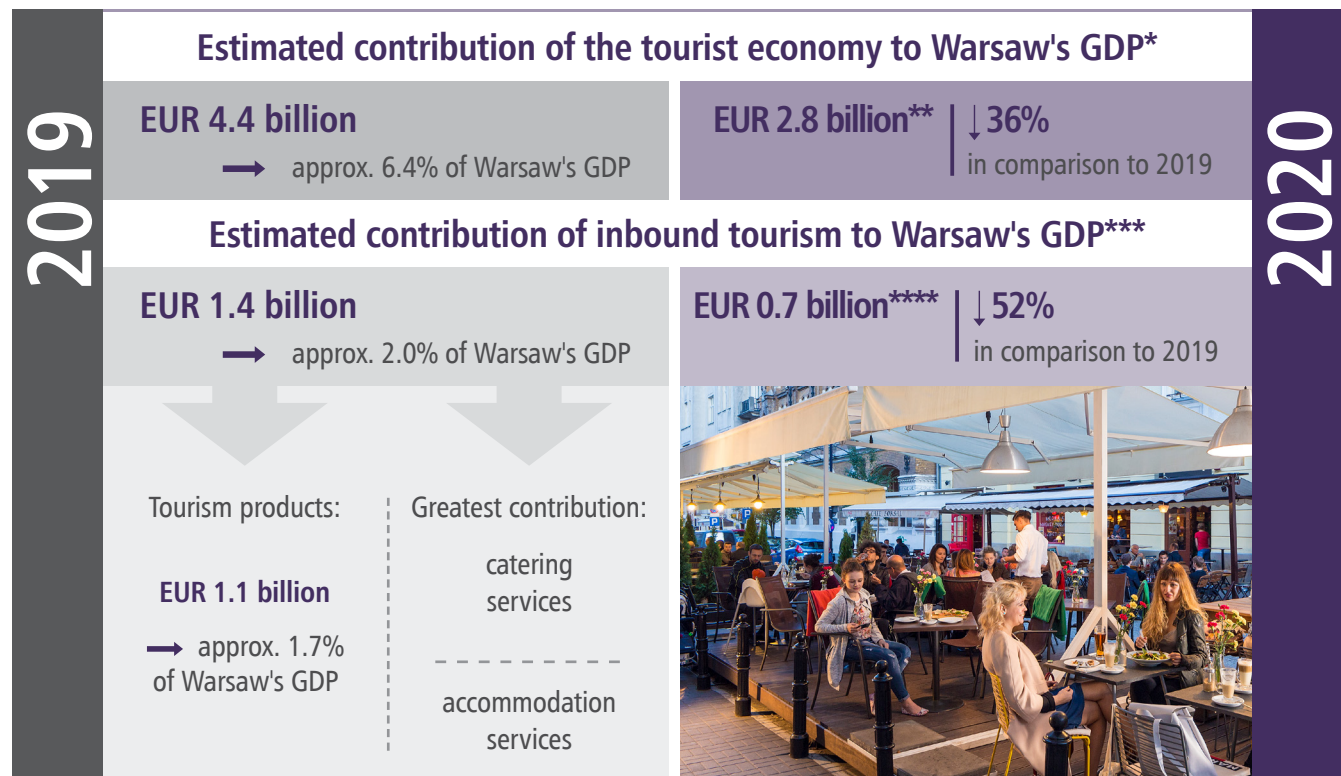
## Estimated tourist expenditure in 2019-2020 – TOP10 shopping categories on which tourists spent most in 2020 (in EUR millions)



## Structure of expenditure of tourists from selected countries in 2020 compared to the structure of expenditure of foreign tourists in total



## Impact of tourism on the economy of Warsaw<sup>2</sup>



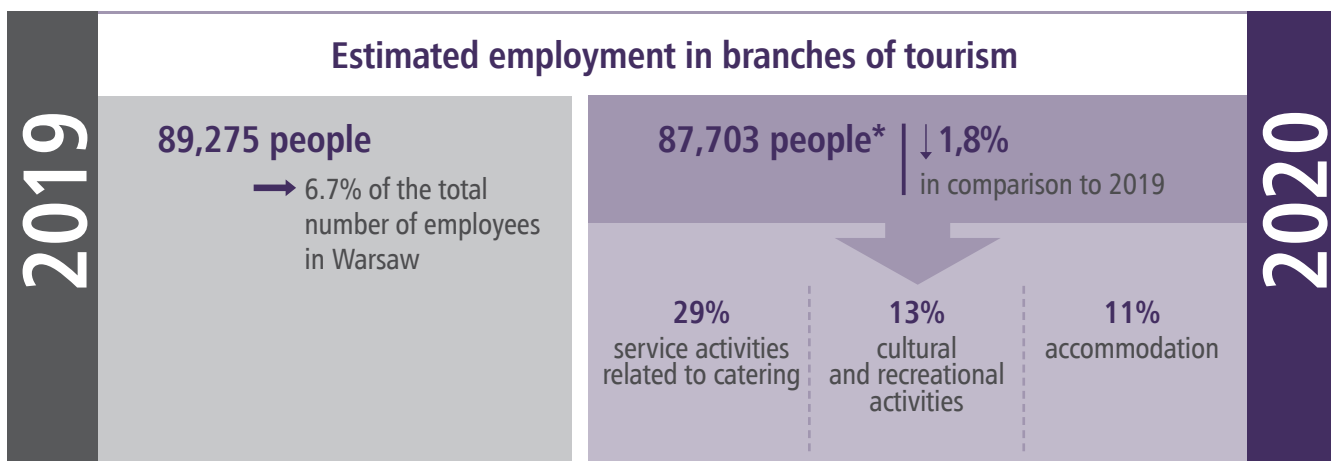
\*takes into account the contribution of characteristic tourist activities, part of whose output may also be intended for residents and may be sold (e.g. by tourist operators) also outside the Mazowieckie Voivodeship

\*\*because of a lack of data on Warsaw's GDP in 2020, it was impossible to calculate the percentage contribution of the tourist economy to the GDP of the capital

\*\*\*inbound tourism is that part of the tourist economy which contributes to Warsaw's GDP and is most strongly related to the sale of services to tourists

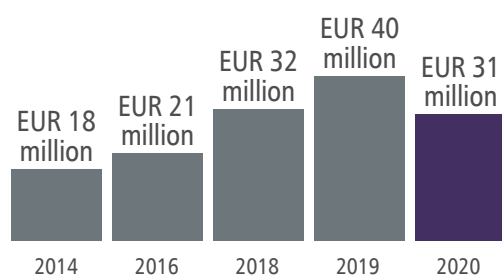
\*\*\*\*because of a lack of data on Warsaw's GDP in 2020, it was impossible to calculate the percentage share of inbound tourism to the GDP of the capital

**Note:** The drop in the contribution of the tourist economy to Warsaw's GDP over the period under review was considerably smaller than the drop in the contribution of inbound tourism to the capital's GDP, because a significant proportion of services offered as part of so-called characteristic tourist activities (e.g. services connected with food or transport) are used not only by tourists but also by residents. The size of the contribution of inbound tourism in 2020 illustrates the scale of the collapse of tourism caused by the COVID-19 pandemic, particularly in services related to accommodation and air transport.



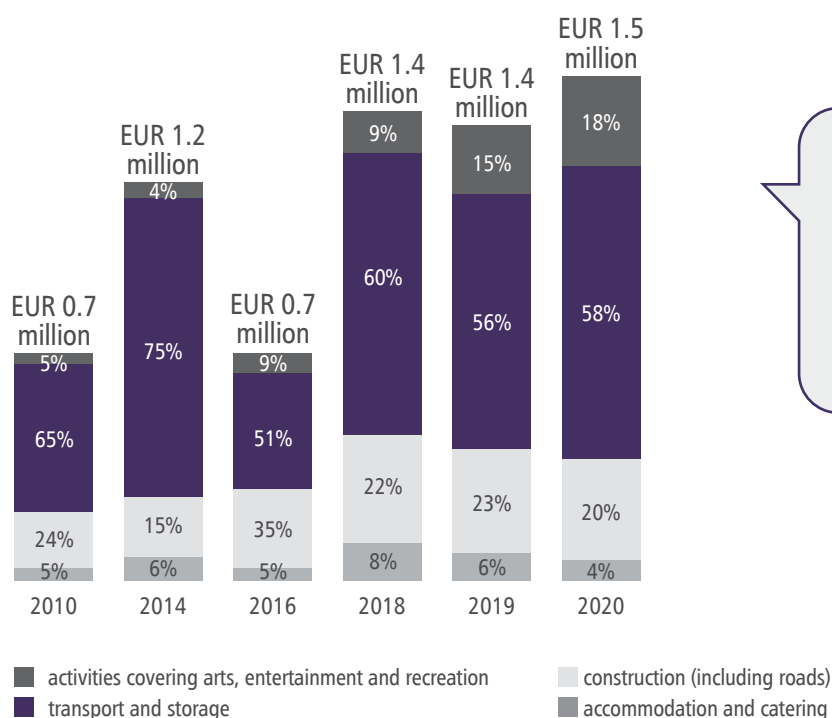
\*because of a lack of data on the number of people employed in Warsaw in 2020, it was impossible to calculate the percentage share of those employed in branches of tourism

### Estimated income from tourism to the City of Warsaw budget in 2014-2020



**Note:** In 2019-2020, the trend observed in previous years continues. There has been a steady decline in the number of people working in accommodation-related activities (despite dynamic growth in the number of accommodation establishments), while there has been a rapid increase in the number of employees in catering. Almost half of employees in the tourist economy in 2019 were employed in microenterprises.

### Estimated investment in tourism in 2010-2020 (number and % share)



**Note:** The COVID-19 pandemic had no impact on the amount of investment in tourism in 2020. Investments started and planned before the outbreak of the pandemic continued. Decreases in expenditure will likely only be seen in subsequent years.

# 6 | Meetings industry



**Warsaw  
is the best place  
for scientific  
and business  
events  
in Poland<sup>1, 2, 3</sup>**



extensive network of national and international air connections



largest supply of bed places in hotels

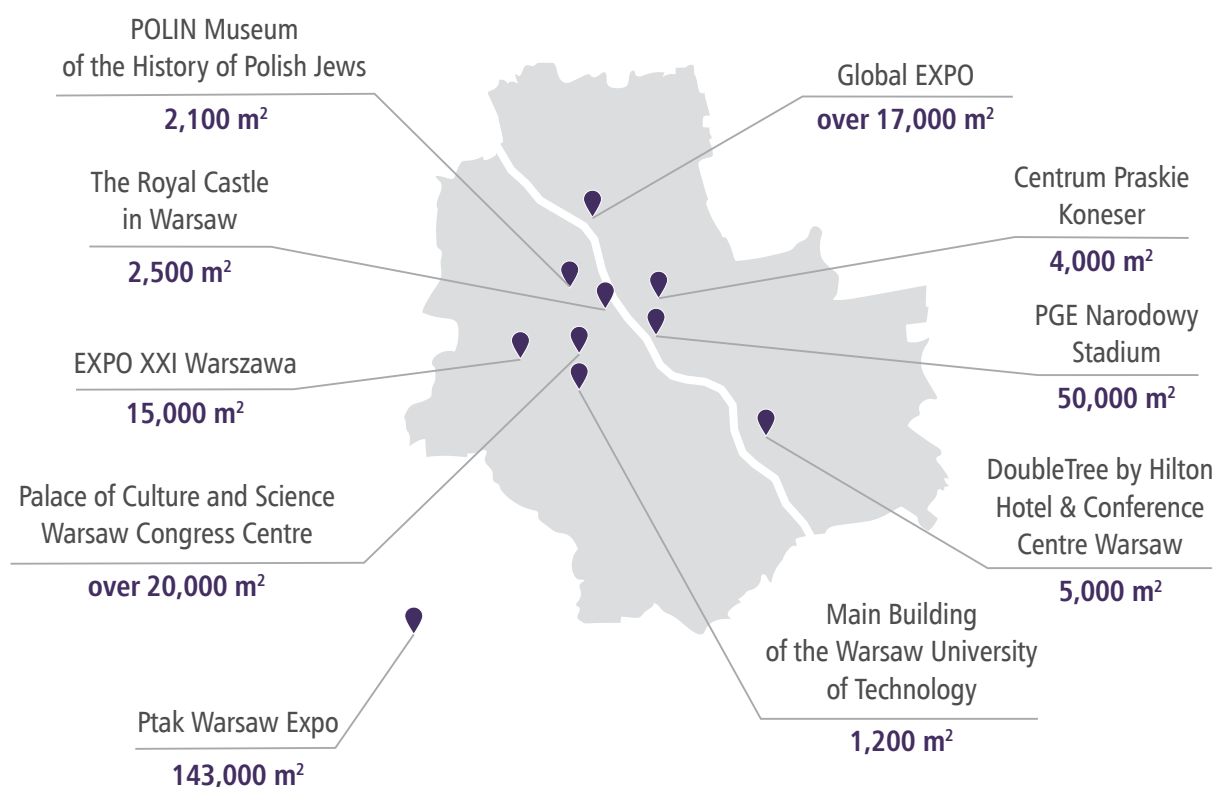


over 200 key MICE venues (conference centres and hotels as well as museums, theatres, and universities with conference rooms)



a wide catalogue of companies providing professional services for the meetings industry

## Event space in selected venues in 2020<sup>4, 5</sup>



## The condition of Warsaw's tourism and MICE industry during the global crisis caused by the COVID-19 pandemic\*<sup>6</sup>

**100%** | of industry representatives confirmed a decrease in revenue of their institution/company in March-December 2020 as compared to the same period last year, and 2/3 of them believed that it amounted to 75-100%

**96%** | of respondents expected a decrease in revenue in 2021 compared to 2019 (35% in the 75-100% range and 46% in the 50-70% range)

**54%** | of respondents confirmed staff reductions at their institution/company in March-December 2020

**64%** | of respondents confirmed stopping planned investments in their institution/company in March-December 2020

Which forms of government support under the so-called Anti-crisis Shields were used most often in the surveyed institutions/companies?

**80%** | redundancies from the Social Insurance Institution (ZUS)

**74%** | standstill benefits

**74%** | wage subsidies

\*results of a study in which representatives of businesses from various sectors of the tourism and MICE industry of Warsaw took part

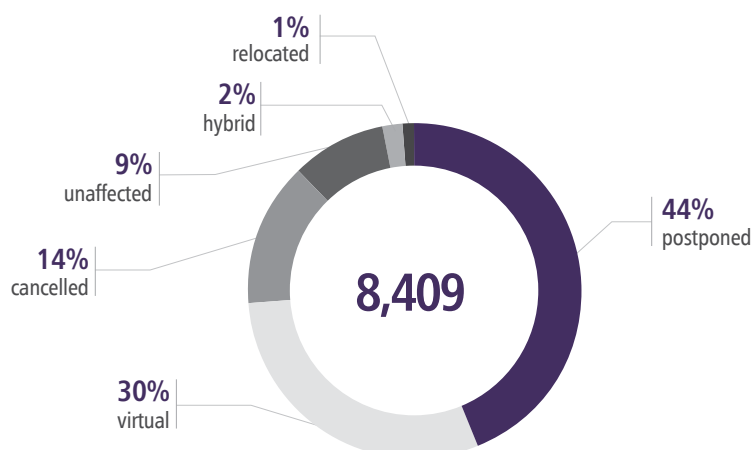
As a result of the introduced restrictions on the operation of the meetings industry in Poland, conferences, trade fairs and events did not take place for almost the entire year of 2020. Therefore, event figures will not be provided in this year's edition of the Report.<sup>1</sup>

## Association meetings\* according to the ICCA (International Congress and Convention Association), the most important international association on the congress market<sup>7</sup>

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

Due to the COVID-19 pandemic, the ICCA did not prepare an analysis of the number of association meetings organised in each city in 2020.

### Number of association meetings planned worldwide for 2020



## Impact of the COVID-19 pandemic on the future of the global market of association meetings\*8

**66%** | of associations believe that the pandemic will fundamentally change the way they operate in the future

**84%** | of associations intend to incorporate hybrid and digital elements into future events to increase attendance

**60%** | of associations believe that, compared to traditional meetings, hosting virtual events reduces their ultimate chance of success

\*results of a 2020 study conducted by the ICCA (International Congress and Convention Association) in collaboration with AfSAE (African Society of Association Executives), APFAO (Asia Pacific Federation of Association Organisations) and ESAE (European Society of Association Executives), which analysed the post-COVID-19 strategies and plans of nearly 200 international associations worldwide

## Events planned in Warsaw for 2021-2026<sup>1</sup>

Most events planned for 2020 have been first moved to 2021 and then to subsequent years.

In the opinion of the Warsaw Convention Bureau, events planned for 2023-2024 and later have the greatest chance of being acquired.

**86%** | of acquired events are conferences and congresses

**37%** | of acquired events have TBC status (date to be confirmed by the organiser)

## The biggest events planned in Warsaw for 2021-2024\*<sup>1</sup>



**World of Coffee**

**3** | **10,000**  
days | participants



**Meeting of the World Convention of the Churches of Christ (WCCC)**

**4** | **4,000**  
days | participants



**World Congress of Audiology (WCA)**

**4** | **1,100**  
days | participants



**International Numismatic Congress (INC)**

**6** | **720**  
days | participants



**ESSKA Speciality Days**

**2** | **700**  
days | participants



**International Symposium on Bilingualism (ISB)**

**6** | **630**  
days | participants

\*status as of May 2021



## Forecasts on the pace of resurgence of the meetings industry in Europe after the COVID-19 pandemic\*<sup>9</sup>



- continued travel and operational restrictions on the meetings industry in 2021 and negative sentiment associated with the pandemic will mean that the conference market will not begin to recover until 2022
- the anticipated lifting of most restrictions in 2022 will allow for a rapid recovery of the business travel sector, however, the level of business tourist spending will be 33% lower in 2022 compared to 2019
- a change in the mid-term behaviour of business tourists and the development of virtual and hybrid forms of participation in conferences and meetings will put back the return to pre-pandemic rates; small corporate meetings and events will fully recover by the end of 2022, and large conferences and congresses by the end of 2023
- average attendance at all events until 2024 will be below that recorded in 2019

\*according to the Strategic Alliance of the National Convention Bureaux of Europe

## Forecasts for the resurgence of the global business travel sector after the COVID-19 pandemic\*<sup>10</sup>

- business travel will return later than leisure travel
- regional and domestic business travel will recover fastest, followed by international business
- sales business events and meetings with clients will be organised first
- business travel in the industries least affected by the crisis, i.e. industry and manufacturing (e.g. construction, machinery and equipment manufacturing, pharmaceuticals), will be the first to take place

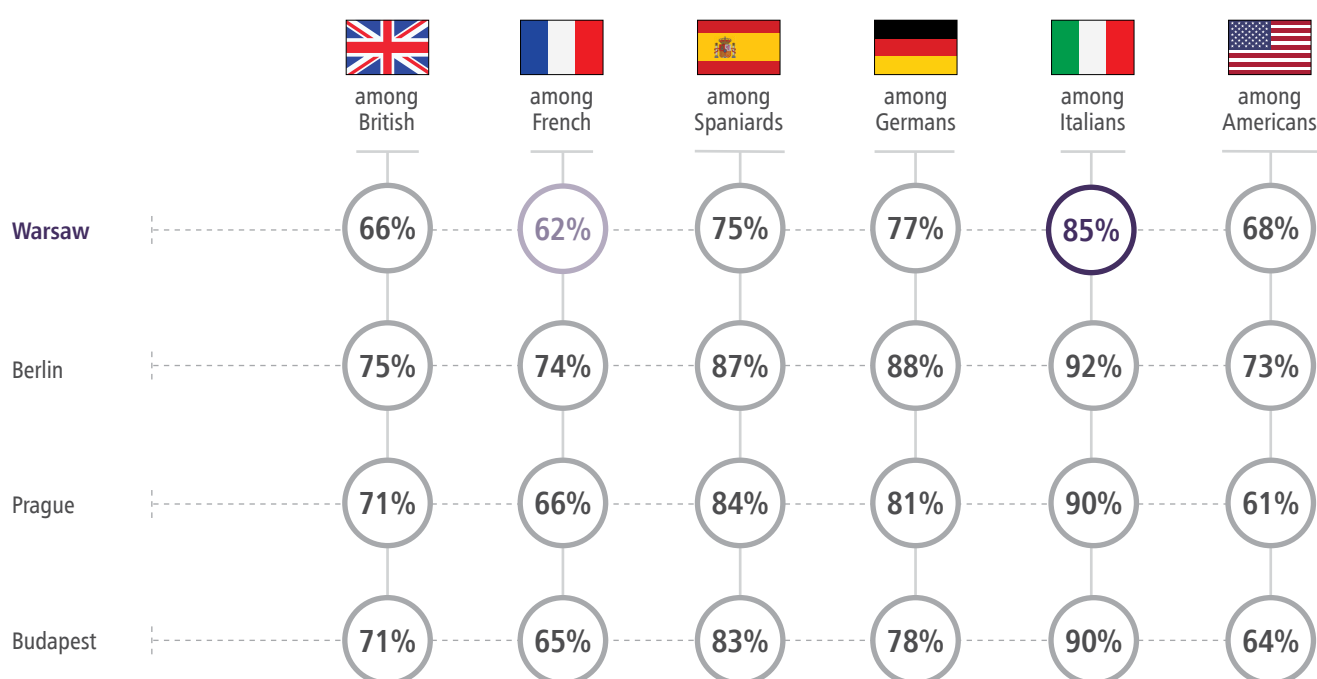


\*following industry consultation conducted by McKinsey & Company and a survey for the Global Business Travel Association (GBTA) amongst business travel companies and travel service providers, including GBTA members and non-members

# 7 | Image

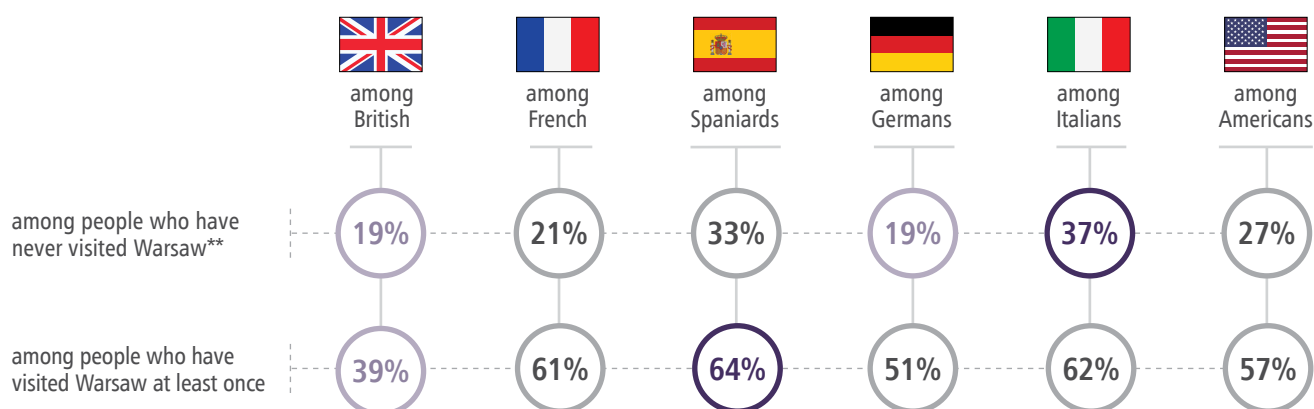
## Knowledge of Warsaw among residents of selected countries as compared to other European cities\*<sup>1, 2</sup>

\*among residents of the UK, France, Spain, Germany and Italy in 2019 and among residents of major US cities in 2018



## Positive impressions about Warsaw among residents of selected countries\*<sup>1, 2</sup>

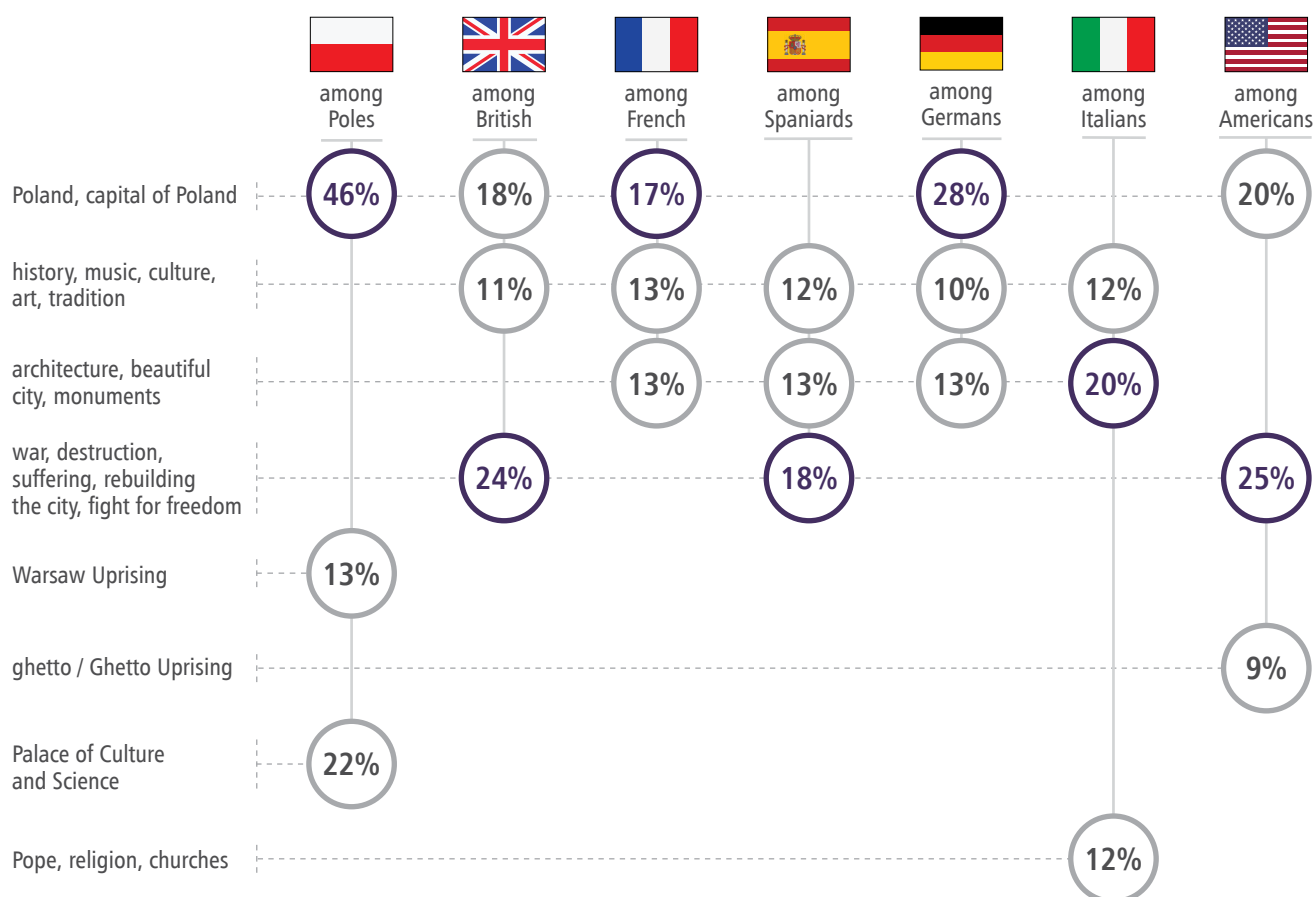
\*among residents of the UK, France, Spain, Germany and Italy in 2019 and among residents of major US cities in 2018



\*\*among people who have at least heard of Warsaw

## Main associations with Warsaw among residents of selected countries<sup>\*,\*\*1, 2, 3</sup>

<sup>\*</sup>among residents of Poland in 2020, among residents of the UK, France, Spain, Germany and Italy in 2019 and among residents of major US cities in 2018

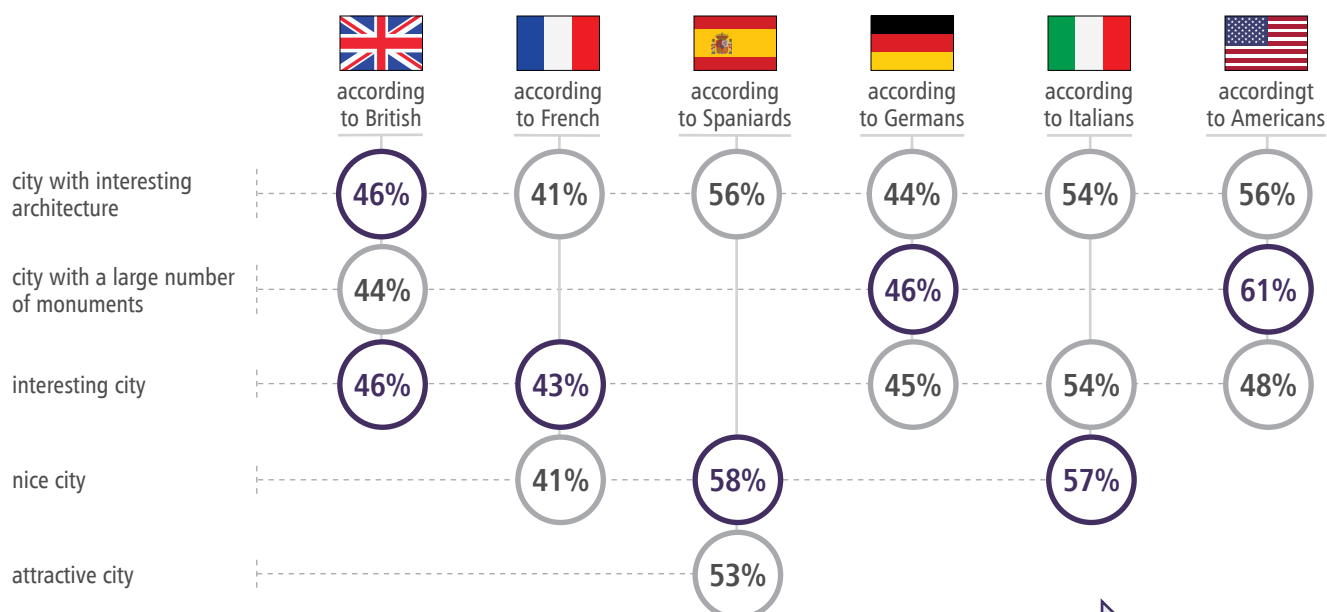


<sup>\*\*</sup>among people who have at least heard of Warsaw

**Note:** Associations common for most nations are: capital city of Warsaw, its history/culture and architecture/monuments. In some countries, among the dominant associations are also those related to war and religion, and only among Poles is the Palace of Culture and Science a strong association.

## Main characteristics of Warsaw according to residents of selected countries<sup>\*,\*\*1, 2</sup>

<sup>\*</sup>among residents of the UK, France, Spain, Germany and Italy in 2019 and among residents of major US cities in 2018

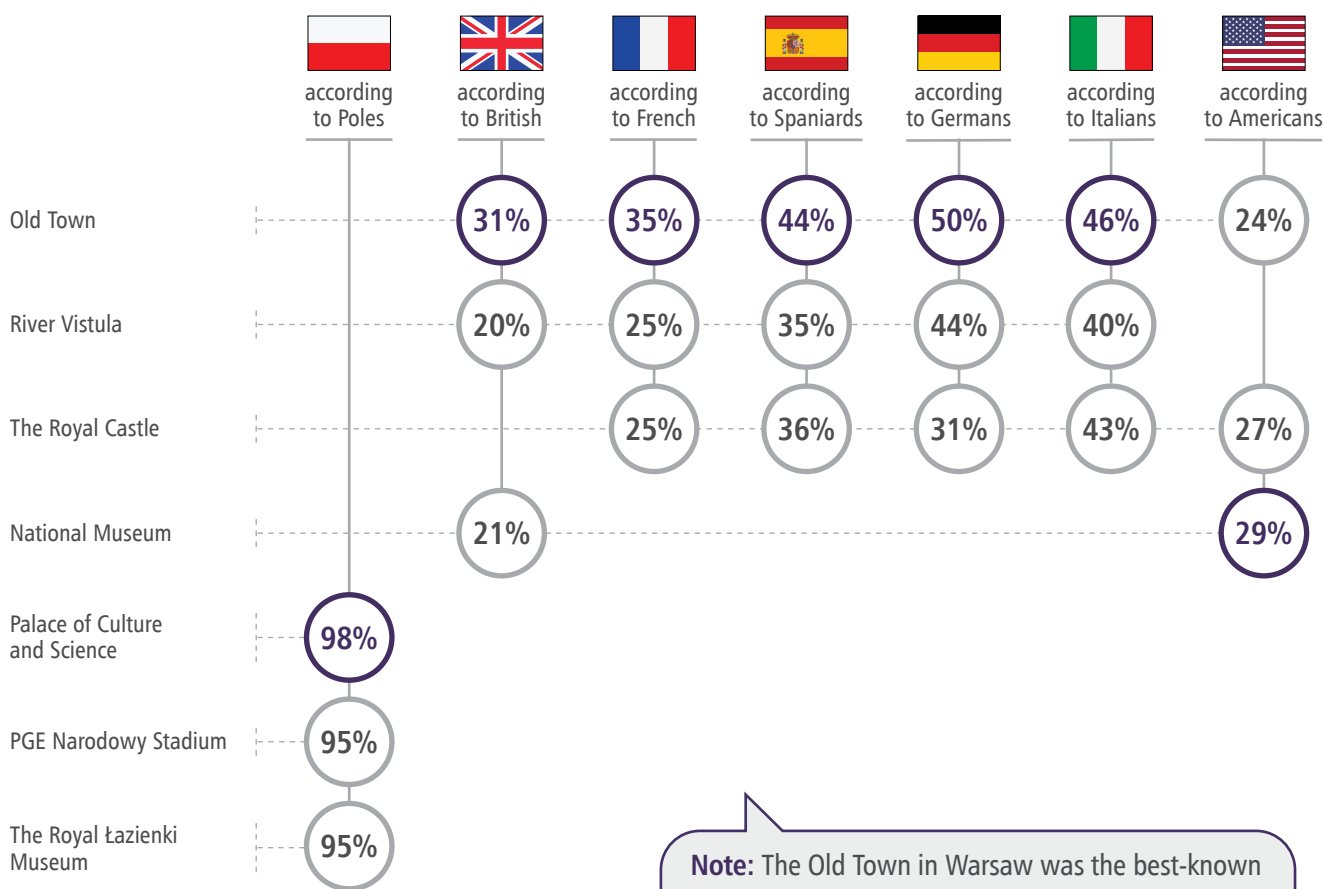


<sup>\*\*</sup>according to people who have at least heard of Warsaw

**Note:** In all countries it is the positive characteristics of the city – related to its attractiveness for tourists – that are dominant.

## Best-known Warsaw landmarks, places and events according to residents of selected countries<sup>\*,\*\*1, 2, 3</sup>

<sup>\*</sup>among residents of Poland in 2020, among residents of the UK, France, Spain, Germany and Italy in 2019 and among residents of major US cities in 2018

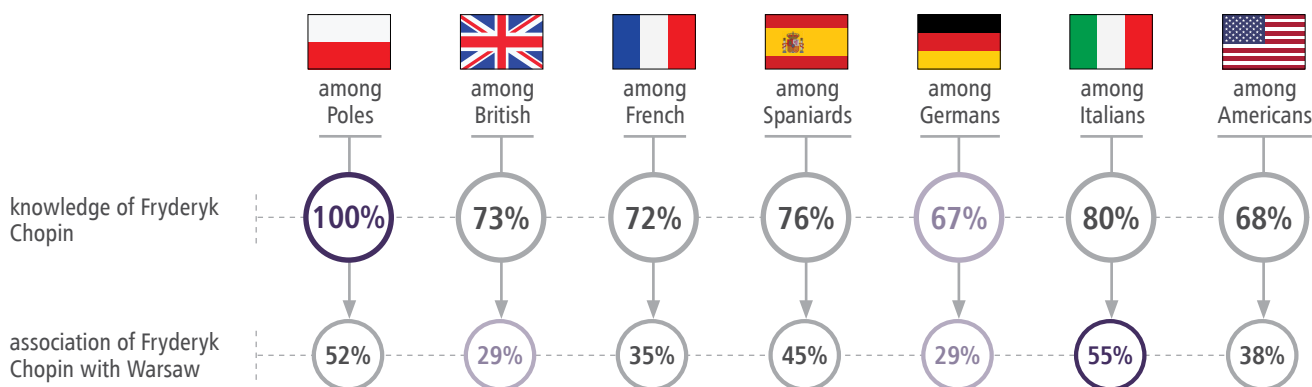


<sup>\*\*</sup>according to people who have at least heard of Warsaw

**Note:** The Old Town in Warsaw was the best-known among non-Polish respondents. The Vistula River and the Royal Castle were mentioned slightly less frequently. Among Poles, the answers differed considerably in comparison to other nations.

## Recognition of Fryderyk Chopin among residents of selected countries<sup>\*,\*\*1, 2, 3</sup>

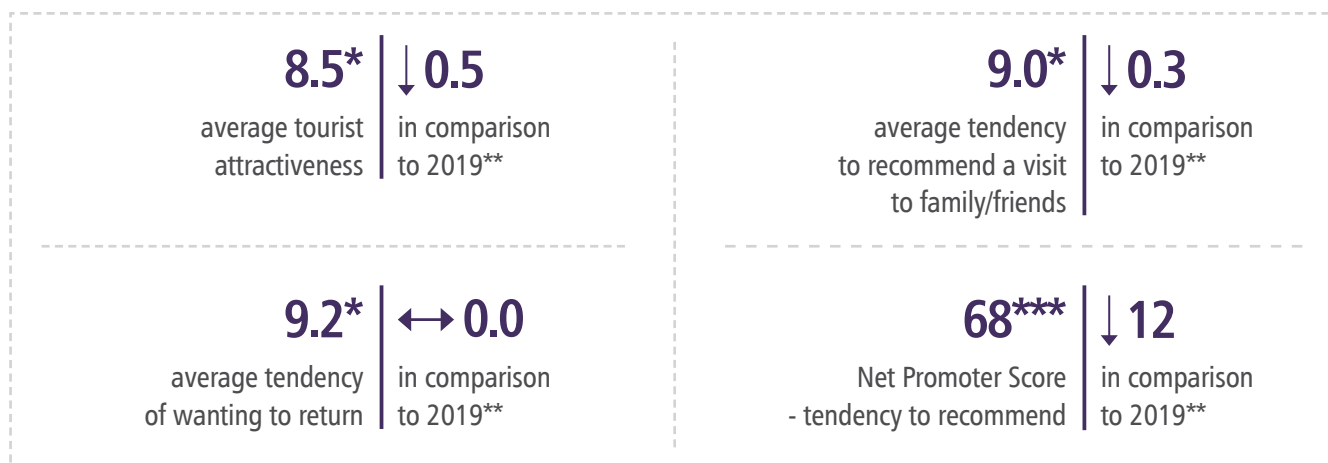
<sup>\*</sup>among residents of Poland in 2020, among residents of the UK, France, Spain, Germany and Italy in 2019 and among residents of major US cities in 2018



<sup>\*\*</sup>among people who have at least heard of Warsaw



## Warsaw according to tourists in 2020<sup>4, 5</sup>



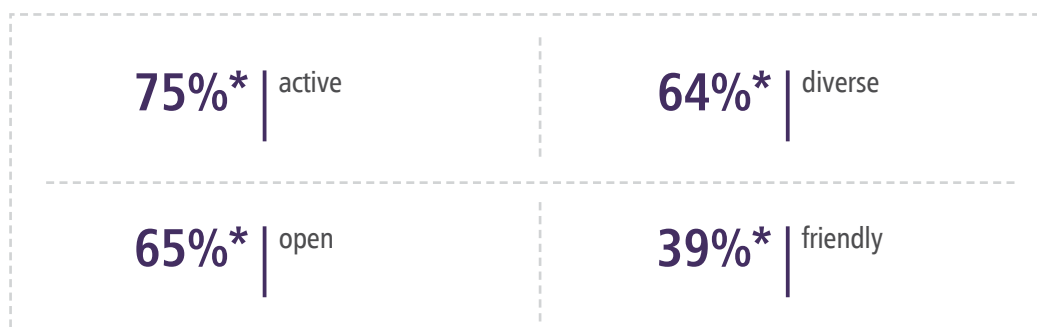
\*on a scale of 1 to 10

\*\*change compared to the same period in 2019 (the survey was conducted in 2020 in the months of September-November)

\*\*\*on a scale from -100 to +100

**Note:** For the first time in several years, in the year of the COVID-19 pandemic, these indicators did not increase or were lower than last year.

## According to residents of Poland, Warsaw is a city:<sup>3</sup>



\*data for 2020

**92%** of tourists in 2020 had a positive opinion of safety in the city<sup>4</sup>



Germans significantly more often associate Poland and Poles with Warsaw than Kraków and Gdańsk. The dominant group of **associations of German residents** with Poland, as in 2016 and 2018, were those related to tourism, holidays and beautiful landscapes. In 2020, they accounted for 29% of all associations of Poland, which is an increase compared to previous surveys.<sup>6</sup>



Warsaw in 2020 was once again ranked in the fourth tier of the global **Anholt-Ipsos City Brands Index**, next to Moscow and Basel.<sup>7</sup>



Warsaw's Powiśle neighbourhood took 6<sup>th</sup> place in the ranking of "**coolest districts in Europe**", compiled by The Guardian. Powiśle came out ahead of districts in cities such as Paris, Rome or Prague. The authors of the ranking appreciated, among other things, the atmosphere of the Vistula boulevards, the variety of dining and shopping options, and ubiquitous greenery.<sup>8</sup>



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## Photographs:

City of Warsaw, with the exception of p. 33 - R. Motyl, City of Warsaw and p. 38 - Warsaw Tourism Organization

All amounts given in EUR are calculated based on the average Bank of Poland exchange rate on 31.12.2020 (1 EUR = 4.6148 )



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