1 Selected social and economic information
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2 Accessibility and tourist accommodation
   p. 14

3 Tourist attractions and cultural events
   p. 26

4 Tourist traffic
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5 Tourist spending and the impact of tourism on the city’s economy
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6 Meetings industry
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7 Promotion of Warsaw tourism through the activities of Warsaw Tourist Office
   p. 46
2021 was another difficult year for tourism worldwide, especially in metropolitan areas and so too for Warsaw. The COVID-19 pandemic continued to limit tourism, especially in the first half of the year. Closed hotels, restaurants, museums as well as the need to work under a sanitary regime effectively discouraged visitors from Poland’s capital, resulting in a record low number of tourists in the first quarter and partly second quarter.

The situation improved with the advent of a widely available vaccine against coronavirus. Most European countries, including Poland, loosened travel restrictions. Hotels, restaurants, and tourist attractions reopened, and outdoor events resumed. This translated directly into an increase in arrivals to Warsaw in the third and fourth quarters. The end of the year also saw a resurgence of the meetings industry. Traditional off-line conferences, trade fairs and symposia were organised and face-to-face returned to the events calendar.

Although the second half of the year saw a marked revival in the tourism sector, statistics left no doubt: the 5 million tourists who visited Warsaw during the whole of 2021 amounted to a two-fold drop compared to 2019.

Despite the clear difficulties and restrictions on tourism, the past year also brought positive developments. New post-industrial spaces were completed: the Warsaw Brewery and the Norblin Factory were opened. Both investments significantly contribute to the attractiveness of what Warsaw has to offer and have immediately become popular meeting places.

Work continued throughout the year on the realisation of a major project, the so-called New Centre of Warsaw. The investment, which includes the Museum of Modern Art, the Variety Theatre and Central Square, will significantly transform the city centre. It will become more friendly and attractive for both residents and tourists.

Warsaw is a city that is changing and developing dynamically. This is particularly noticeable when looking at the city skyline. Almost every year, new skyscrapers are appearing, distinguished by their interesting architecture and green approach. In 2021, the Varso Tower, which is the tallest building in the European Union, reached its full height.
Estimated number of arrivals of tourists in Warsaw

5.0 m tourists in total  
3.9 m domestic tourists  
1.1 m foreign tourists  

50% in comparison to 2019  
51% in comparison to 2020  
51% in comparison to 2019  
57% in comparison to 2020  

Tourist accommodation and its use

772 tourist accommodation establishments including 107 hotels  
52,474 bed places including more than 35,000 in hotels  
2.0 m tourists have used accommodation establishments including 454,611 foreign tourists  
3.5 m nights spent by tourists in accommodation establishments  
30.5% occupancy in hotels  
8.1 p.p. in comparison to 2020  

Estimated tourist spending in Warsaw

EUR 1.25 billion tourists in total  
EUR 0.59 billion domestic tourists  
EUR 0.66 billion foreign tourists  

TOP 3 shopping categories on which tourists spent most

- Retail: EUR 338 million  
- Catering: EUR 165 million  
- Fashion: EUR 134 million

Impact of tourism on the economy of Warsaw

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

87,703 people estimated employment in branches of tourism

Tourist attractiveness of Warsaw

Most popular main purposes of visit

- Sightseeing: 28% domestic tourists  
- Visiting relatives or friends: 29% foreign tourists  
- Business matters/interests: 8% domestic tourists, 8% foreign tourists  
- Rest: 20% domestic tourists, 23% foreign tourists

Top Warsaw attractions according to tourists

- Old Town: 39% domestic tourists  
- The Royal Lazienki Park: 19% foreign tourists  
- Palace of Culture and Science: 19% foreign tourists  
- The Warsaw Rising Museum: 15% foreign tourists  
- Copernicus Science Centre: 14% foreign tourists  
- Museum of the History of Polish Jews POLIN: 11% foreign tourists  
- Palace of Culture and Science: 3% domestic tourists
1 Selected social and economic information

Basic demographic and economic data about Warsaw

1,860,281 people
Data from the census conducted between 1 April and 30 September 2021

Varsovians accounted for 33.7% of the Mazowieckie voivodeship population

1,088,900 people
average paid employment in enterprise sector in January-December 2021

those employed in Warsaw constituted 69% of all those employed in the Mazowieckie voivodeship

Registered unemployment rate at the end of December in 2017-2021

<table>
<thead>
<tr>
<th>Year</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>2.0%</td>
</tr>
<tr>
<td>2018</td>
<td>1.5%</td>
</tr>
<tr>
<td>2019</td>
<td>1.3%</td>
</tr>
<tr>
<td>2020</td>
<td>1.8%</td>
</tr>
<tr>
<td>2021</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

Over 100,000 EU citizens worked in Warsaw in 2021.

Fitch Ratings confirmed in 2021 Warsaw’s international long-term rating at ‘A-’ with a stable outlook.

EUR 1,571.20
average monthly gross wages and salaries in enterprise sector in the last quarter of 2021

the average gross salary in Warsaw was EUR 82.51 higher than in the rest of Mazowieckie voivodeship and EUR 218.70 higher than in the rest of Poland

EUR 109
in comparison to 2020

the highest gross salary was reported by employees working in the information and communication sector (EUR 2,343.36) and the lowest by those employed in the administration and supporting activities sector (EUR 1,073.88)

499,070
number of entities of the national economy based in Warsaw in the REGON register at the end of December 2021

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

1068 R&D entities were operating in Warsaw at the end of December 2020 with an expenditure which amounted to over EUR 2.1 billion.

26.5% of the share capital of Warsaw companies was owned by foreigners at the end of December 2020.

73% of Warsaw entrepreneurs in 2020 positively rated the growth conditions of their companies in Warsaw.

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.

Over 100,000 EU citizens worked in Warsaw in 2021.
The Global Financial Centres Index 30
Ranking of global financial centres

56th place
2nd place
in the ‘business friendliness’ category
6th place
in the ‘economic potential’ category

Tholons Global Innovation Index™ 2021
World ranking of best localisations for business services centres

35th place
in the ‘Tholons Global Innovation City Index’

Kearney 2021 Global Cities Index
World ranking of global cities
64th place

New panorama of Warsaw: the city’s office market

6.15 million m² stock of modern office space at the end of 2021. 16 office buildings with over 324,000m² of office space have been completed. Some of the largest projects that have been granted occupancy permits include: Warsaw Unit (Ghelamco – 56,400m²), Skyliner (Karimpol – 48,500m²), Generation Park Y (Skanska Property Poland – 44,200m²). At the end of 2021, there was approximately 308,000m² of office space under construction in Warsaw planned for delivery between 2022 and 2024, the lowest figure since 2009.

The largest office projects under construction are Varso Tower (66,300m², to be delivered in 2022), The Bridge (47,000m², in 2025) and Skyliner II (38,000m², in 2024). The Skyliner II, third phase of Lixa (28,100m²) and Lakeside (24,000m²) construction projects will begin in 2022.

More than 40% of the total stock of office space in Warsaw has received green certification. Poland’s capital, together with Chicago, Houston, New York, and San Francisco, is one of the greenest metropolises in the world.

4 Warsaw skyscrapers – Varso, Browary, Warsaw Unit, Mennica Legacy Tower were awarded the highest BREEAM Interim green certificate ranking of “Outstanding”.

The Newest Skyscrapers of Warsaw

- Varso Place 230 m
- Mennica Legacy Tower 140 m
- Widok Towers 95 m
- Warsaw Unit 180 m
- Skyliner 195 m
- The Warsaw Hub 130 m
- Tholons Global Innovation Index

More than 1.7 million m² of shopping centre space was available in the Warsaw agglomeration in 2021.

A trend that is gaining importance is investments in mixed-use facilities. In 2020 Elektrownia Powiśle and in 2021 Browary Warszawskie and Norblin Factory were delivered.

No new full-size shopping centre was built in Warsaw in 2021, additional square metres were provided by extensions of existing facilities such as Designer Outlet Warszawa in Piaseczno near Warsaw of 6,000 m².

Quality of life in Warsaw

94% of residents in 2021 had positive impressions associated with Warsaw as a place to live.

89% of residents in 2021, given the choice, would prefer to live in Warsaw in comparison to 2020.

93% of residents in 2021 had a positive opinion of safety in the city.

According to the “Safe and Open Cities” report, Warsaw is the safest city in Poland. According to a safearound.com report, Warsaw is the seventh safest capital city in the world (following Andorra, Vienna, Seoul, Oslo, Prague and Taipei).

91% of residents in 2021 had a positive opinion of cleanliness and tidiness in the city.
Warsaw was ranked 14th 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 2021.26

Warsaw was ranked 164th in terms of cost of living out of 209 cities in the Mercer 2021 Cost of Living City Ranking.27

Warsaw came 69th 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.27

Poland’s capital was ranked 54th 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 8th place in the ‘governance’ category and 14th place in the ‘urban planning’ category.28

Green Warsaw31-34

15.4% share of forests within the city limits
the largest share of forests can be found in the following districts: Wawer, Wesoła, Białołęka and Ursynów

68% share of green areas* within the city limits
86 parks and 279 greens**
most parks are located in the following districts: Śródmieście (13), Mokotów (11) and Praga-Południe (9)

5.7 m² of publicly accessible recreational green areas are available for every inhabitant of Warsaw24

27.3% share of protected areas within the city limits
7 Natura 2000 areas
12 nature reserves
494 natural monuments

In 2021, more than 5,000 trees were planted in Warsaw, including around 3,900 along the capital’s streets as well as over 37,000 m² shrubs and hedges. More than 5,700 m² of urban meadows were sown and about 50 ha of lawns were left unmown/rewilded. As part of the green transformation in 3 districts of Warsaw, more than 1,600 m² had concrete removed and replaced with greenery.

Modernisation work began in 3 parks: Pole Mokotowskie, under the Warsaw Uprising Mound and Cichociemni Home Army Paratroopers Park; 2 zip-line parks are also being designed: on Suwak Street and above the Warsaw ring road tunnel; as well as 2 new squares: Warsaw Dialect Square in Wola district and Urban Sports Square by the Ratusz Arsenal metro station.

The attitude of Varsovians to the development of tourism in 2021

91% of residents believe the development of tourism in Warsaw has a positive impact on their life↑15 pp in comparison to 2019.
88% of Varsovians believe their everyday life is not disturbed by tourists↑21 pp in comparison to 2019.
84% of residents believe that Warsaw is not crowded with tourists↑20 pp in comparison to 2019.
55% of Varsovians who live in the vicinity of flats or houses that are rented out to tourists experience daily positive consequences of this; for 42% this has neutral consequences↑3 pp and↓6 pp in comparison to 2019.

Vistula River35,36

An extremely active season took place on the River Vistula:
free canoeing, rowing lessons, standup paddleboarding, and Optimist dinghy classes.

On 4 of Warsaw’s beaches there were free rentals of deckchairs, sports equipment, and toy and book lending.

Sports activities on the beaches were also prepared for visitors which included yoga, chess, beach volleyball, and ultimate frisbee.

A contract was signed for the construction of a pedestrian and cycle bridge over the River Vistula.

The 452-metre-long crossing will connect the New Warsaw Centre with the revitalised Old Praga district. Construction is due to be completed in 2024.

In 2021, the Romantic Beach in Wawer returned to use after renovation.

A large recreational clearing and a sand island with natural logs were made available for residents in which to play and relax.

Walking paths have been created, together with benches and picnic tables.
In 2021, more than 7 million passengers were served at Chopin Airport, an increase of 36% compared to 2020. The one-million passenger mark was surpassed three times in one month. The percentage recovery rate of passenger traffic in 2021 compared to 2019 was 40%, which puts Chopin Airport ahead of airports such as Prague, Budapest, Vienna, Berlin, Copenhagen, and Helsinki.

Almost 64% of passengers travelled on traditional carriers. 16% of passengers chose low-cost airlines while 20% chose charters. The percentage distribution of passengers using traditional traffic was above 80% between January and the end of December.

The top five most popular destinations on regular routes were: Paris, London, Frankfurt, Kyiv, and Amsterdam. As for charters, the most popular destinations in 2021 were shorter southern routes such as to Antalya, Hurghada, Marsa Alam, Rhodes, and Heraklion.

The number of passengers served and the number of flights that took place increased by 67.1% and 48.2% of total 2020 traffic, respectively. Comparing these figures with the pre-pandemic period, 2021 passenger traffic levels represented 46.9% of the traffic recorded in 2019.
Warsaw Chopin Airport and Warsaw Modlin Airport in comparison to other selected airports – passengers served in 2021 (number and change in comparison to 2020)\(^\text{17}\)

<table>
<thead>
<tr>
<th>Airport</th>
<th>2020 Passengers</th>
<th>Change 2021</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warsaw Chopin Airport</td>
<td>7,473,734</td>
<td>↑ 36.3%</td>
<td></td>
</tr>
<tr>
<td>Warsaw Modlin Airport</td>
<td>1,457,040</td>
<td>↑ 67.1%</td>
<td></td>
</tr>
<tr>
<td>Kraków Airport</td>
<td>2,158,563</td>
<td>↑ 25.9%</td>
<td></td>
</tr>
<tr>
<td>Gdańsk Lech Wałęsa Airport</td>
<td>3,072,074</td>
<td>↑ 18.5%</td>
<td></td>
</tr>
<tr>
<td>Katowice Airport</td>
<td>2,398,973</td>
<td>↑ 61.1%</td>
<td></td>
</tr>
<tr>
<td>Wrocław Airport</td>
<td>3,418,836</td>
<td>↑ 41%</td>
<td></td>
</tr>
<tr>
<td>Poznań Airport</td>
<td>1,055,162</td>
<td>↑ 60.4%</td>
<td></td>
</tr>
<tr>
<td>Budapest Airport</td>
<td>4,622,882</td>
<td>↑ 19.8%</td>
<td></td>
</tr>
<tr>
<td>Prague Airport</td>
<td>4,388,828</td>
<td>↑ 19.7%</td>
<td></td>
</tr>
</tbody>
</table>

Rail and road accessibility\(^\text{18}\)

**Approximate travel time to Warsaw from selected cities**

- **Gdańsk**: 2h 33m, 4h 31m
- **Warsaw**: 2h 22m, 2h 24m
- **Poznań**: 2h 55m, 3h 36m
- **Lódz**: 1h 23m, 1h 58m
- **Wrocław**: 3h 41m
- **Prague**: 8h 31m, 7h 30m
- **Kraków**: 2h 20m, 2h 31m
- **Rzeszów**: 4h 09m, 4h 24m
- **Bialystok**: 2h 24m
- **Budapest**: 10h 54m, 8h 31m
- **Berlin**: 5h 52m, 6h 31m

Means of transport used by tourists coming to Warsaw in 2021\(^\text{19,20}\)

**Means of transport used to travel directly to Warsaw (% share and change compared to 2020*)**

<table>
<thead>
<tr>
<th>Means of Transport</th>
<th>Share 2021</th>
<th>Change 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Train</td>
<td>39%</td>
<td>↓ 12 p.p.</td>
</tr>
<tr>
<td>Car</td>
<td>50%</td>
<td>↑ 10 p.p.</td>
</tr>
<tr>
<td>Airplane</td>
<td>8%</td>
<td>↓ 4 p.p.</td>
</tr>
</tbody>
</table>

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

Public transport\(^\text{21}\)

- **49%** of people travelled by bus
  - The Municipal Bus Company (MZA) took delivery of 100 NGV buses. As a result, Warsaw’s largest bus operator now has 500 low- and zero-emission vehicles.
  - Eco-friendly measures have been taken focusing on the development of a network of bus shelters with photovoltaic panels and a hint of green by laying stonecrop on the roofs of shelters.

- **23%** of people travelled by tram
  - In September, the last section of the tram route linking Tarchomin, Nowodwory, and Winnica with the first metro line via the Maria Skłodowska-Curie bridge was commissioned in September.
  - The first of 123 trams ordered by Warsaw Trams (Tramwaje Warszawskie) and manufactured by Hyundai Rotem arrived in Warsaw. The over 30-metre-long trams are 2.5 metres longer than those in service to date and can accommodate 240 passengers.
  - At the end of the year, a contract was signed for the construction of the fifth tram depot in Warsaw, which will be built in Białoleka. The Annopol depot will be the first tram depot to be built since 1963 and the planned completion date is February 2024.

- **809.5 million** passengers used public transport in 2021
  - **↑ 11.4%** in comparison to 2020.

- **22%** of people travelled by metro
  - Intensive work on the second metro (M2) line continued on the last eastern and penultimate western section. At the same time, trains for the Warsaw metro were being manufactured and tested in Ostrava and Pilsen. As per the contract, Škoda Transportation will deliver 37 single-car trains, each accommodating up to 1,500 passengers. These will be the first Warsaw Metro trains in which the passenger space has been conventionally divided into two parts: for those planning a longer journey, where more seats and
information screens have been provided, and for passengers wishing to travel for two or three stops, where the focus is more on grab handles.

• Simultaneously, with the construction of the M2 line, preparatory work for the extension of the third metro line is underway. As part of the first phase of the project, an eight-kilometre route is planned in Praga-South, starting at the already completed M2 National Stadium station.

5% of people travelled by rail

• In 2021, the first part of the order for new trains from Newag was finalised. The first of the 21 passenger car stock underwent tests at the Railway Institute in Zmiędrz in order to arrive in Warsaw in early 2022.

Tourist Routes

Warsaw Tourist Routes were used by 130,492 people in 2021 - more than 6,000 more than in pre-pandemic 2019. Both Varsovians and tourists could use ferries across the Vistula, a ship to Serock, bus and tram lines served by historic rolling stock and a narrow-gauge railway in the summer.

107,700

2,400

9,700

8,000

2,700

people crossed the river serviced by 3 ferries

people took a boat trip to Serock

people travelled by the Ikarus or Barlieta

people travelled on vintage trams

people took a trip on the Piaseczyński-Grojecka Narrow-Gauge Railway

16 P+R (Park and Ride) car parks with 4,500 parking spaces and 32 free charging stations for electric vehicles were operational in Warsaw in 2021. At the end of 2021, the car park at the Warszawa Żerań railway station was completed. Further car parks are planned or under construction (this includes Warszawa Jeziorki and Bródno Metro Station). The new car parks are environmentally-friendly and cater to local inhabitants and will use renewable energy sources.

Warsaw Public Bike Veturilo

• residents and tourists had 5,000 bicycles at their disposal, including 60 child cycles and 100 electric cycles, available at close to 400 stations

86% of residents in 2021 believed Warsaw to be a cycle-friendly city

710 km of cycling routes

35 km in comparison to 2020

710 km

35 km

Nearly 3.3 million rentals in comparison to 2020

93% of tourists in 2021 had a positive opinion of public transport

94% of residents in 2021 had a positive opinion of the functioning of public transport

Warsaw among the top cities with the most sustainable public transport in Europe. The Polish capital city came 4th 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.

Tourist accommodation

• In 2021, the first part of the order for new trains from Newag was finalised. The first of the 21 passenger car stock underwent tests at the Railway Institute in Zmiędrz in order to arrive in Warsaw in early 2022.
Hotels in 2021 (number and change in comparison to 2020)

Number of establishments*

<table>
<thead>
<tr>
<th>Hotels in 2021</th>
<th>Number of establishments</th>
</tr>
</thead>
<tbody>
<tr>
<td>total</td>
<td>107 (103 to 2020)</td>
</tr>
<tr>
<td>change</td>
<td>↓4 (→2020)</td>
</tr>
</tbody>
</table>

Note: After the first year of the pandemic, Warsaw's hotel base shrank slightly by 4 facilities but the number of beds increased.

Number of bed places

<table>
<thead>
<tr>
<th>Hotels in 2021</th>
<th>Number of bed places</th>
</tr>
</thead>
<tbody>
<tr>
<td>total</td>
<td>35,147 (28,085 to 2020)</td>
</tr>
<tr>
<td>change</td>
<td>↑466 (↑2020)</td>
</tr>
<tr>
<td>number of rooms</td>
<td>18,048 (→2020)</td>
</tr>
</tbody>
</table>

Average number of bed places

<table>
<thead>
<tr>
<th>Average number of bed places</th>
</tr>
</thead>
<tbody>
<tr>
<td>472 (318 to 2020)</td>
</tr>
</tbody>
</table>

In March 2021, the NYX hotel opened in the centre of Warsaw next to the Central Railway Station. The hotel is located in the Varso Place complex, next to Varso Tower which is under construction and will be tallest building in the European Union. It offers 331 rooms, two bars, including one on the roof of the 10-storey building, 550 m² of meeting space, a Clash restaurant with Polish-Israeli cuisine, retro gaming machines and a fitness studio.35

In May, the Arche Group launched the second phase of the Arche Hotel Polonez in Ursynów with 250 rooms and six conference rooms for 500 people. Together with the first phase, which opened in 2018, the entire complex has 400 rooms sold under the condo system.36

Hotel Nobu Warsaw received four awards at the European Property Awards 2021-2022. It was the winner in the Hotel Architecture category, and also received five stars and a nomination for the next stage of the competition in the Hotel Construction & Design category, five stars and a nomination for the next stage in the Hotel Interior category, and five stars and a nomination for the next stage in the Bathroom Design category. The European Property Awards are one of the most important European awards for the best architectural projects.37

There are 25 hotel openings planned in Warsaw between 2022 and 2025, including the following:38
- 5-star Autograph Collection
- 5-star Royal Tulip Apartments
- 4-star Puro
- 4-star Radisson Red
- 3-star Moxy Warsaw Centrum

Other tourist accommodation establishments in 2021 (number and change in comparison to 2020)39

Number of other tourist establishments

<table>
<thead>
<tr>
<th>Other tourist establishments in 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>total</td>
</tr>
<tr>
<td>motel</td>
</tr>
<tr>
<td>hostel</td>
</tr>
<tr>
<td>youth hostel</td>
</tr>
<tr>
<td>camp site</td>
</tr>
<tr>
<td>conference and training centre</td>
</tr>
<tr>
<td>guest room / private accommodation</td>
</tr>
<tr>
<td>apartment</td>
</tr>
<tr>
<td>conference and training centre</td>
</tr>
<tr>
<td>guest room / private accommodation</td>
</tr>
<tr>
<td>apartment</td>
</tr>
</tbody>
</table>

Number of bed places

<table>
<thead>
<tr>
<th>Guest rooms in tourist accommodation establishments in Warsaw districts in 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,001 - 20,000</td>
</tr>
<tr>
<td>5,001 - 10,000</td>
</tr>
<tr>
<td>1,001 - 5,000</td>
</tr>
<tr>
<td>0 - 1,000</td>
</tr>
</tbody>
</table>

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

25 hotel facilities are currently under construction or planned in Warsaw. The vast majority belong to various chains such as Marriott, Puro, Ibis, and Holiday Inn.
As a result of the restrictions introduced during the COVID-19 pandemic, hotels in Warsaw were not allowed to operate from the beginning of the year until 12 February (only certain professional groups were allowed to use them), and again from 15 March to 7 May 2021. During the periods 12 February to 15 March and 7 May to 26 June, hotels operated under a sanitary regime that included a 50% occupancy limit. In the following months of 2021, the permitted hotel occupancy rate was between 50% and 75%.

Users of tourist accommodation establishments

2,029,847 tourists have used accommodation establishments in 2021

454,611 foreign tourists have used accommodation establishments in 2021

Note: As a result of the restrictions introduced during the COVID-19 pandemic, hotels in Warsaw were not allowed to operate from the beginning of the year until 12 February (only certain professional groups were allowed to use them), and again from 15 March to 7 May 2021. During the periods 12 February to 15 March and 7 May to 26 June, hotels operated under a sanitary regime that included a 50% occupancy limit. In the following months of 2021, the permitted hotel occupancy rate was between 50% and 75%.

Foreign tourists using accommodation establishments in 2021 - Top 10 by country of residence (number, % share and change compared to 2020)

<table>
<thead>
<tr>
<th>Country</th>
<th>Number</th>
<th>% Share</th>
<th>Change</th>
</tr>
</thead>
</table>
| Germany        | 53,992 | 12.0%   | ↑ 37.5%
| USA            | 46,823 | 10.1%   | ↑ 35.4%
| Ukraine        | 31,559 | 7.0%    | ↑ 25.0%
| United Kingdom | 30,980 | 6.8%    | ↑ 10.7%
| France         | 28,601 | 6.3%    | ↑ 52.9%
| Lithuania      | 23,539 | 5.2%    | ↑ 157.5%
| Italy          | 21,470 | 4.7%    | ↑ 51.3%
| Spain          | 18,846 | 4.1%    | ↑ 105.3%
| Israel         | 13,538 | 3.0%    | ↑ 66.2%
| Belarus        | 12,574 | 2.7%    | ↑ 50.8%

Tourists using accommodation establishments in 2010-2021

Tourists using accommodation establishments in 2021 compared to selected cities

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

3,479,622 nights spent by tourists in accommodation establishments in 2021*

Note: For years, the Czech and Hungarian capitals have been among the leaders in Europe in terms of the share of overnight stays by foreign tourists in the total number of overnight stays. 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 made up the vast majority.

Nights spent by tourists in accommodation establishments by month in 2019-2021*

Nights spent by tourists in accommodation establishments in 2017-2021 compared to selected cities (number in millions and change year on year)†

Note: As a result of the restrictions introduced during the COVID-19 pandemic, hotels in Warsaw were not allowed to operate from the beginning of the year until 12 February (only certain professional groups were allowed to use them), and again from 15 March to 7 May 2021. During the periods 12 February to 15 March and 7 May to 26 June, hotels operated under a sanitary regime that included a 50% occupancy limit. In the following months of 2021, the permitted hotel occupancy rate was between 50% and 75%.

Foreign tourists have used accommodation establishments in 2021 in comparison to 2020

*users of tourist accommodation establishments

*users of tourist accommodation establishments

*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
95% of tourists in 2021 had a positive opinion of tourist accommodation.*

Hotels – rooms rented and nights spent

More than 1.9 million rooms rented by tourists in hotel in 2021*

Rooms rented to tourists in 2021 by hotel category.*

6.2%
6.6% 19.0%
33.2% 31.0%
10.6%

Occupancy in hotels in 2021*

30.5% ↑ 8.1 p.p. in comparison to 2020

highest occupancy in October 56.0%

lowest occupancy in April 12.7%

Nights spent by tourists from selected countries in hotels in 2016-2021

Warsaw was ranked 20th among 117 European cities in the league table of the number of overnight stays in 2021, ahead of cities such as Budapest, Oslo, and Brussels. Another Polish city, Gdańsk, was ranked 55th.

Property rentals via Airbnb and Vrbo in 2021:

4,487 properties were available for rent in November (houses, flats, etc.), 252 fewer compared to December 2020 and 2,372 fewer compared to March 2020.

42,487 properties were available for 1-3 months, 16 p.p. more compared to March 2020.

46% of properties were available for 1-3 months, 15 p.p. percentage points more compared to March 2020.

94% of tourists who visited Warsaw in 2021 stayed overnight within the city limits.

Main types of tourist accommodation in 2021 (% share and change compared to 2020*)

Standard of hotels used by tourists in 2021

Domestic tourists

Foreign tourists

95% of tourists in 2021 had a positive opinion of tourist accommodation.*

*people who have used this type of service
Bringing old post-industrial buildings back to life has become a noticeable trend in Warsaw in recent years. Old factories, former industrial buildings, spaces that have been out of business for decades are opening up – friendly places for city residents and visitors. New flats, office buildings, restaurants, cafes, shops are emerging, and cultural events and fairs are being organised. In 2021, two of these types of places popped up in Warsaw and two more were under construction.

### Post-industrial Warsaw

#### Praga Koneser Centre
Opened in 2018, the Koneser Centre is located on the site of the former Koneser Warsaw Vodka Factory. The historic buildings have been restored and new residential and office spaces have been built to fit in with the architecture of the site. It is home to the Museum of Polish Vodka, Google Campus Warsaw, a conference and event centre, exhibition centre, art galleries, a hotel and more than 12 food and beverage outlets. The Koneser Square, which is open to the public, hosts many cultural events and fairs. In 2021, Koneser Square hosted, among others, Thursday classical music concerts, performances by Och-Teatr Theatre and Polonia Theatre, painting workshops with artists, the Przerób-my festival, summer cinema and fair events.

#### Warsaw Breweries
After many years, the former site of one of the largest breweries in Europe has been restored with new residential and office buildings constructed there. It was officially opened in 2021. There are 5 new city squares, restaurants and a sports bar owned by Robert Lewandowski in a 19th century brewhouse; the Brewery Food Hall opened in autumn with 12 food and bar concepts in the cellars of the renovated Leżakownia. The Warsaw Brewery has found its place in a side wing of the same building, brewing its first vats of 18 varieties of craft beer as early as July 2021.

#### Elektrownia Powiśle
Opened in 2020, the area around the former power station in Powiśle is located in the vicinity of the Vistula Boulevards, the Copernicus Science Centre, and the University of Warsaw Library. It is a combination of retail space featuring unique brands, a beauty zone, and a food court with 13 dining concepts. In 2021, Elektrownia Powiśle hosted more than 400 events: fairs, concerts, exhibitions, summer cinema screenings, and workshops.

#### Norblin Factory
The site of the former Norblin, Buch Brothers and T. Werner metal works opened in autumn 2021 after a long restoration. Nine historic buildings and approximately 50 machines (42 pieces of equipment listed in the register of monuments) of the former Warsaw Metalworking Shop have been restored, including a historic 1000T hydraulic press weighing 50 tonnes. Great work of applied art, like platters, can be admired in the Norblin Factory Museum. The museum offers a modern way of sight-seeing with four different paths, and the museum facilities are located throughout the whole complex. The Norblin Factory also houses a boutique cinema, “KinoGram”, a Piano Bar, an art gallery, a health food market with certified organic products and Warsaw’s largest restaurant area, “Food Town”, located in five historic halls and 23 gastronomic areas. In 2022, “Apple Museum Poland” and a fully digital art gallery, “ART BOX Experience” were due to open in the Factory.

#### Under construction

#### PZO Factory
The former Polish Optical Works located in the Kamionek part of Praga district dates back to the second half of the 19th century. Residential buildings, office space and a food court in the historic factory building are under construction on the site.

#### Bohema
The century-old former Poliena-Uroda cosmetics factory includes 13 historic buildings on its site. The oldest of these was built in 1899. Lofts are being created in the revitalised buildings, as well as space combining office, retail, and services.
The Royal Łazienki Museum in Warsaw
1. The Royal Lazienki Museum in Warsaw 4,824,120
2. Museum of King Jan III’s Palace at Wilanów 1,668,820
3. The Royal Castle in Warsaw – Museum 1,188,968
4. PGE Narodowy Stadium 1,100,000
5. City Zoological Garden in Warsaw 762,885
6. Copernicus Science Centre 598,000
7. Museum of Sports and Tourism in Warsaw 527,289
8. The Marshall Józef Piłsudski’s Municipal Stadium of Legia Warsaw 455,000
9. Palace of Culture and Science in Warsaw** 414,164
10. POLIN Museum of the History of Polish Jews 383,662
11. Szczepanik Mound 302,329
12. The Warsaw Rising Museum 255,222
13. Center for Biological Diversity Conservation in Powsin 236,127
14. Museum of Caricature 212,928
15. Museum of John Paul II and Primate Wyszyński 172,235

Top Warsaw attractions in 2021 according to tourists*14

**Domestic tourists**
- Old Town 29%
- The Royal Lazienki Museum in Warsaw 19%
- Palace of Culture and Science 19%
- The Warsaw Rising Museum 15%
- Copernicus Science Centre 14%

**Foreign tourists**
- Old Town 40%
- The Royal Lazienki Museum in Warsaw 16%
- POLIN Museum of the History of Polish Jews 13%
- Palace of Culture and Science 11%
- Copernicus Science Centre 9%

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

Selected tourist attractions in Warsaw districts in 202122-32

- The 50th anniversary of the reconstruction of the Royal Castle in Warsaw began in January. The celebrations are planned until 2024. The first year of the anniversary saw four major exhibitions, meetings, lectures, and an anniversary picnic.
- In March, the main seat of the Museum of Independence in the Przebendowski/Radziwiłł Palace was opened after being modernised. The most important change is the adaptation of the basement into a multimedia room, which can accommodate an audience of almost 100 people. Four permanent exhibitions await visitors. As part of the work, the “Polonia Restituta. The struggle for independence and borders 1914-1921” permanent exhibition and the “Together with the White Eagle through the Ages. A Symbol of Rulers, the State, and the Nation” exhibition. Two new permanent exhibitions are also on display: “Borderlands and Borderlessness in the Collections of the Museum of Independence” and an exhibition recounting the history of the Museum’s building.
- Plac Defilad is changing its appearance. The construction of the Museum of Modern Art, one of the key projects under construction as part of the New Centre of Warsaw, is progressing. After completing the foundations and underground structures, the construction has entered the above-ground phase and erection of the first storeys. Part of the square will be used to create a new Central Square, the design of which was previously selected in a competition. There will be traces of Warsaw’s history here, alluding to streets and tenement houses that no longer exist, and there will be more greenery and leisure areas. In December, Warsaw City Council decided to increase funding for the construction of the TR Warszawa theatre building, which will be built in the vicinity of the Museum.
- On 19 April, on the 78th anniversary of the outbreak of the Warsaw Ghetto Uprising, a monument was unveiled to commemorate the place where the Ringelblum Archive, the most valuable collection of documents relating to the Holocaust, was hidden and later found. The monument takes the form of an underground chamber from which a glass cube emerges housing a document inside. The archive itself is kept at the Jewish Historical Institute as a depository of the Jewish Historical Institute Association. In 1999, it was added to UNESCO’s Memory of the World list, which includes the most important documents of humanity.
Selected tourist attractions in the Warsaw metropolitan area in 2021  

The Karolin Palace, home of the Mazowsze ensemble, has become the setting for the Karolin Centre for Polish Folklore. The Centre’s exhibition tells the story of the Mazowsze ensemble and its creators and presents the folk culture of selected regions of Poland. In addition to presenting regional folk music, song, dance, and costumes, the exhibition showcases the beauty of Poland’s national dances: the Polonaise, Mazur, Kujawiak, Oberek, and Krakowiak, all derived from folk national dances: the Polonaise, Mazur, Kujawiak, Oberek, and Krakowiak, all derived from folk traditions. The Centre also hosts meetings and lectures.

The Mazovian Village Museum in Sierpc celebrated its 50th birthday in September. The museum includes a town hall, a 50-hectare open-air museum and a branch of the Small Town Museum in Biecz. This large-scale museum is filled with museum artefacts which include fifteen thousand small and larger items like household objects, furniture, textiles, toys, objects of religious worship, agricultural tools and machines, and craftsmen’s workshops. A separate part of the collection includes around 1,000 sculptures by folk artists from the so-called Sierpc sculpture centre. Anniversary celebrations included meetings, lectures, and a gala.

On 30 July, after two years of renovation, the Kubicki Stables in the Royal Łazienki Park were reopened. It has been possible to recreate the historical shape and layout of the building, with the central part rebuilt and the historical gates restored. The eastern and western wings have been adapted for exhibition purposes. Two permanent exhibitions were created and will also be augmented with educational activities for children and adults.

On 12 September, the Konopacki Palace, which was one of the most beautiful buildings in the New Praga neighbourhood in the 19th century, was opened after renovation. The palace has become the second headquarters of the “Praga” Cultural Centre and will serve as a cultural meeting place for the inhabitants of Praga. It has been planned as an open space building where everyone will be able to realise their creative ideas for social, cultural, and the promotion of culture activities.

On 9 December, the Gallery of 19th Century Art reopened at the National Museum. As part of the newly opened exhibition, visitors can see works by some of Poland’s most distinguished artists (including Wyspianski’s pastels, which have not been exhibited for a long time) and a wider selection of sculptures than before, with a total of around 300 objects presented in a new style.

In October, the City Council handed over a plot of land on Towarowa Street to the Warsaw Uprising Museum which will be modernised and expanded. The project involves the construction of new functional buildings and the development of the area around the complex. Thanks to this expansion, the Museum will have a new entrance onto Towarowa Street, one of the main streets of Wola district. In addition to the entrance area, a new pavilion will include a hall that can accommodate up to 300 people.

On 12 November, the Mazovian Village Museum in Sierpc, which was celebrated its 50th birthday in September, the museum includes a town hall, a 50-hectare open-air museum and a branch of the Small Town Museum in Biecz. This large-scale museum is filled with museum artefacts which include fifteen thousand small and larger items like household objects, furniture, textiles, toys, objects of religious worship, agricultural tools and machines, and craftsmen’s workshops. A separate part of the collection includes around 1,000 sculptures by folk artists from the so-called Sierpc sculpture centre. Anniversary celebrations included meetings, lectures, and a gala.

Cultural events in Warsaw in 2021  

The biggest cultural event of 2021 was the 18th International Chopin Piano Competition postponed from 2020 due to the pandemic. Auditions began on 2 October and lasted until 20 October. 87 pianists representing 17 countries took part. The 12 highest-scoring pianists performed in the finals and during the 15 days of the competition auditions, pianists presented a total of almost 2,000 interpretations of Frédéric Chopin’s compositions. The final auditions ended on 20 October, with the top prize going to Bruce Liu from Canada. The Competition was broadcast on many media channels, including the internet, social media, radio, and television. Chopin2020.pl, the official website of the Competition recorded nearly 1,000,000 page views. The competition app was downloaded as many as 70,000 times. As in 2015, the materials posted on the Chopin Institute’s YouTube channel enjoyed the highest reach. In October, they were viewed as many as 37,500,000 times. More than 50% of viewers were Japanese, with broadcasts also eagerly listened to in Poland, South Korea, the United States, and Taiwan.

The event was covered by more than 55,000 publications in the national media, reaching an audience of 728 million, and 10,000 publications in foreign media with an audience of 187 million.

In Warsaw, accompanying events were held in unusual locations under the name “Everything is playing Chopin in Warsaw” including: an artistic performance at the Świętokrzyska underground station performed by the Art. Color Ballet troupe, a night concert at the National Stadium station featuring one of the participants of the International Chopin Piano Competition, as well as Chopin tram rides with live music played by pianists.

The most important of the cultural events for tourists in 2021 had a positive opinion of the cultural attractions on offer.*  

96% of tourists in 2021 had a positive opinion of the cultural attractions on offer.*  

* people who have used this type of service

In May, a new mural by Tytus Brzozowski was unveiled on the side of a building in the Warsaw district of Praga. The mural was created for the 65th anniversary of “Totalizator Sportowy” and depicts a variety of elements and themes important to the company. It is painted with ecological paint that neutralises nitrogen oxides and reduces the amount of the harmful pollutant formaldehyde in the air. This is another mural in Warsaw by a well-known water colour painter, whose work can already be admired on several walls of Warsaw tenements and blocks of flats.

In October, the Gallery of 19th Century Art reopened at the National Museum. As part of the newly opened exhibition, visitors can see works by some of Poland’s most distinguished artists (including Wyspianski’s pastels, which have not been exhibited for a long time) and a wider selection of sculptures than before, with a total of around 300 objects presented in a new style.

Due to the pandemic the major scheduled concerts of Sting, Andrea Bocelli, Iron Maiden, Rammstein, and Guns’n’Roses did not take place. These have been postponed until 2022.

Stołeczna Estrada organised 312 physical events and 12 online events, attended by more than 1.6 million viewers.
Estimation of the size of tourist traffic in Warsaw

Estimation of tourist arrivals in 2016-2021 (number in millions and change compared to 2019 and 2020)

- ↓ 50% in comparison to 2019
- ↑ 51% in comparison to 2020

Profile of tourists visiting Warsaw in 2021

- Domestic tourists
- Foreign tourists

Estimation of arrivals of domestic tourists by voivodship in 2021 (number and % share)

- Poland
- Germany
- France
- United Kingdom
- Ukraine
- USA
- Netherlands
- Italy
- Switzerland
- Spain
- Lithuania
- Others

Note: Tourist arrivals in the first quarter and partly the second quarter of 2021 continued to be strongly affected by the COVID-19 pandemic. The loosening of restrictions that were in place did not take place until May when vaccination against the virus was also available to the majority of Polish and EU citizens. The third quarter saw a clear rebound, especially for domestic tourists but also for foreign tourists.

Estimation of tourist arrivals by country in 2021 (number and % share)

- Poland
- Germany
- France
- United Kingdom
- Ukraine
- USA
- Netherlands
- Italy
- Switzerland
- Spain
- Lithuania
- Others

Domestic tourists

- Age
- 6% 15-19 years of age
- 11% 20-24 years of age
- 12% 25-29 years of age
- 31% 30-39 years of age
- 24% 40-49 years of age
- 10% 50-59 years of age
- 52% men
- 48% women

Foreign tourists

- Age
- 6% 15-19 years of age
- 8% 20-24 years of age
- 13% 25-29 years of age
- 26% 30-39 years of age
- 21% 40-49 years of age
- 12% 50-59 years of age
- 43% men
- 8% women

Place of residence

- 13% city > 500,000
- 15% 200,000 - 500,000
- 22% 100,000 - 200,000
- 33% 50,000 -100,000
- 7% rural areas

Note: Tourist arrivals in the first quarter and partly the second quarter of 2021 continued to be strongly affected by the COVID-19 pandemic. The loosening of restrictions that were in place did not take place until May when vaccination against the virus was also available to the majority of Polish and EU citizens. The third quarter saw a clear rebound, especially for domestic tourists but also for foreign tourists.
Characteristics of tourists' stay in Warsaw

Main purpose of visit to Warsaw in 2021 (% share and change compared to 2020)*

Note: In 2021, domestic and foreign tourists came to Warsaw mainly for sightseeing, leisure and visiting relatives or friends.

Which was the current visit of tourists visiting Warsaw in 2021?

Length of stay in Warsaw in 2021

Use of selected local tourist services during stay in Warsaw in 2021

Assessment of the city’s tourist offer for domestic and foreign tourists

Note: The structure of foreign tourist statistics continued to be different from the years before the pandemic, and the largest proportion of foreign tourists were foreigners spending more than 6 nights in Warsaw (e.g. foreign exchange students and temporary workers). However, as can be seen from the shorter average length of stay, this proportion decreased in relation to 2020.
Tourist spending and the impact of tourism on the city's economy

Surveys on tourist spending and the impact on the city’s economy are conducted every 3 years and therefore data for 2021 are not presented in this chapter.

Estimated tourist spending in 2018-2020 (in EUR billions and change year on year)\(^1,2\)

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic tourists</th>
<th>Foreign tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>1.07</td>
<td>0.51</td>
</tr>
<tr>
<td>2019</td>
<td>1.38</td>
<td>0.47</td>
</tr>
<tr>
<td>2020</td>
<td>1.25 (-33%)</td>
<td>0.66</td>
</tr>
</tbody>
</table>

Estimated expenditure of foreign tourists in 2019-2020 – TOP 10 by country of residence* (number in EUR millions and share in total expenditure of foreign tourists)

<table>
<thead>
<tr>
<th>Country</th>
<th>Expenditure (EUR millions)</th>
<th>Share in total expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>EUR 313 million</td>
<td>15%</td>
</tr>
<tr>
<td>France</td>
<td>EUR 205 million</td>
<td>11%</td>
</tr>
<tr>
<td>Italy</td>
<td>EUR 182 million</td>
<td>9%</td>
</tr>
<tr>
<td>Spain</td>
<td>EUR 162 million</td>
<td>8%</td>
</tr>
<tr>
<td>Austria</td>
<td>EUR 158 million</td>
<td>8%</td>
</tr>
<tr>
<td>Holland</td>
<td>EUR 152 million</td>
<td>8%</td>
</tr>
<tr>
<td>Russia</td>
<td>EUR 124 million</td>
<td>6%</td>
</tr>
<tr>
<td>Japan</td>
<td>EUR 121 million</td>
<td>6%</td>
</tr>
<tr>
<td>Canada</td>
<td>EUR 121 million</td>
<td>6%</td>
</tr>
</tbody>
</table>

Estimated tourist expenditure in 2019-2020 – TOP 10 shopping categories on which tourists spent most in 2020 (in EUR millions)

<table>
<thead>
<tr>
<th>Category</th>
<th>Expenditure (EUR millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td>EUR 363 million</td>
</tr>
<tr>
<td>Catering</td>
<td>EUR 265 million</td>
</tr>
<tr>
<td>Fashion</td>
<td>EUR 205 million</td>
</tr>
<tr>
<td>Travel</td>
<td>EUR 164 million</td>
</tr>
<tr>
<td>Transport</td>
<td>EUR 131 million</td>
</tr>
<tr>
<td>Entertainment</td>
<td>EUR 120 million</td>
</tr>
<tr>
<td>Bars/disco/clubs</td>
<td>EUR 116 million</td>
</tr>
<tr>
<td>Souvenirs/arts</td>
<td>EUR 112 million</td>
</tr>
<tr>
<td>Digital devices</td>
<td>EUR 91 million</td>
</tr>
<tr>
<td>Computers</td>
<td>EUR 89 million</td>
</tr>
<tr>
<td>Services</td>
<td>EUR 71 million</td>
</tr>
<tr>
<td>Retail</td>
<td>EUR 65 million</td>
</tr>
</tbody>
</table>

Impact of tourism on the economy of Warsaw

Estimated contribution of the tourist economy to Warsaw's GDP*  
- **EUR 4.4 billion** → approx. 6.4% of Warsaw's GDP
- **EUR 2.8 billion** ↓ 36% in comparison to 2019

Estimated contribution of inbound tourism to Warsaw's GDP**  
- **EUR 1.4 billion** → approx. 2.0% of Warsaw's GDP
- **EUR 0.7 billion** ↓ 52% in comparison to 2019

Tourism products:  
- **EUR 1.1 billion** → catering services
- Greatest contribution: accommodation services

Estimated employment in branches of tourism

<table>
<thead>
<tr>
<th>Branch</th>
<th>Number of Employees</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>89,275</td>
<td></td>
</tr>
<tr>
<td>Service activities</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Cultural and</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Recreational</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

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.

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Income (EUR million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>EUR 18 million</td>
</tr>
<tr>
<td>2016</td>
<td>EUR 21 million</td>
</tr>
<tr>
<td>2018</td>
<td>EUR 32 million</td>
</tr>
<tr>
<td>2019</td>
<td>EUR 40 million</td>
</tr>
<tr>
<td>2020</td>
<td>EUR 31 million</td>
</tr>
</tbody>
</table>

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.
Meetings industry

Warsaw is the best place for scientific and business events in Poland¹-³

Event space in selected venues in 202¹,²

- **POLIN Museum of the History of Polish Jews**: 2,100 m²
- **The Royal Castle in Warsaw**: 2,500 m²
- **EXPO XXI Warsaw**: 15,000 m²
- **Palace of Culture and Science Warsaw Congress Centre**: over 20,000 m²
- **Main Building Warsaw University of Technology**: 1,200 m²
- **Global EXPO**: over 17,000 m²
- **Praga Koneser Centre**: 4,000 m²
- **PGE Narodowy Stadium**: 50,000 m²
- **DoubleTree by Hilton Hotel & Conference Centre Warsaw**: 5,000 m²
- **Ptak Warsaw Expo**: 143,000 m²

Meetings of associations* according to the ICCA (International Congress and Convention Association), the most important international association for the congress market⁶

*Meetings of international associations that take place periodically, have a minimum of 50 participants and migrate between at least three countries

**Number of association meetings planned worldwide for 2021**

- **Total**: 7,914
- **Postponed**: 27.3%
- **Cancelled**: 47%
- **Virtual**: 47%
- **Hybrid**: 13.2%
- **Unaffected**: 4.2%
- **Relocated**: 1.6%

**Number of association meetings planned in Poland for 2021**

- **Total 49**
  - **Warsaw**: 7
  - **Kraków**: 2
  - **Poznań**: 5
  - **Gdańsk**: 6
  - **Wrocław**: 5
  - **Total 15**
    - **Postponed**: 1
    - **Cancelled**: 6
    - **Virtual**: 5
    - **Hybrid**: 2
    - **Unaffected**: 6
    - **Relocated**: 1

**Note:** In 2021, the vast majority of meetings took place in virtual or hybrid form. Since 2020, participants have become accustomed to this type of event and fewer meetings have been postponed or cancelled (44% and 14% respectively in 2020).

Warsaw has for years been the undisputed leader in terms of the number of association events in Poland. Warsaw ranked 1st in Poland, 20th in Europe and 24th in the world. The 49 meetings submitted to the ICCA in 2021 attracted a total of 22,387 participants. Poland was ranked 18th with 158 meetings.

**Warsaw**

- **Excessive 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**
Global business travel began a slow resurgence in 2021 after a huge decline in 2020, when the decline in business travel spending reached 53.8% to US$661 billion. Preliminary estimates show a 14% increase in spending to USD 754 billion in 2021.

Business travel spending is projected to increase 38% in 2022 from the previous year.

The meetings industry is predicted to fully recover in 2024, when spending is expected to reach more than US$1.4 trillion.

According to the UIA, meetings and events were distributed as follows in 2021: Europe welcomed 53% of meetings and events, followed by Asia with 26%, the Americas with 14%, Africa with 3% and Australia/Oceania with 3%.

Poland’s meetings and events industry in 2021
Number of events for groups of 50 or more people in particular Polish cities in 2021 (in comparison to 2020)

### Events planned in Warsaw for 2022-2024

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Congress of Audiology (WCA)</td>
<td>10-13.04.22</td>
<td>1,100</td>
</tr>
<tr>
<td>International Numismatic Congress (INC)</td>
<td>11-16.09.22</td>
<td>720</td>
</tr>
<tr>
<td>ESSKA Speciality Days</td>
<td>24-25.11.23</td>
<td>700</td>
</tr>
<tr>
<td>Annual Meeting Academy of International Business 2023</td>
<td>5-9.07.2023</td>
<td>1,000</td>
</tr>
<tr>
<td>World Allergy Congress 2024</td>
<td></td>
<td>2,300</td>
</tr>
</tbody>
</table>

*Note: Approximately 3/4 of events took place between September and December 2021.

Events by industry in 2020
- 33% commerce and services
- 6% information and communication
- 12% technical
- 14% economic and political
- 16.5% medical
- 18.5% humanities

Events by industry in 2021
- 37% commerce and services
- 13% technical
- 12% economic and political
- 14% medical
- 18% humanities

### Note
Projections for the pace of the resurgence of the meetings market and spending growth were made before the outbreak of the war in Ukraine and the high inflation of 2022.

In 2021, Poland with 69 events (meeting the UIA criteria) was ranked 23rd in the world ranking (presenting 99 countries) and 15th in Europe among 45 countries.

Among the 96 cities from around the world in 2021, the best position among Polish cities was achieved by Warsaw (39th position with 23 meetings) and Kraków (43rd position with 21 meetings).

Among 52 European cities, Polish metropolises were ranked 22nd (Warsaw) and 26th (Kraków) respectively.

According to the UIA, meetings and events were distributed as follows in 2021: Europe welcomed 53% of meetings and events, followed by Asia with 26%, the Americas with 14%, Africa with 3% and Australia/Oceania with 3%.

The "63 International Meetings Statistics Report" takes into account 485,157 meetings organised in 262 countries, in 11,849 cities, by 28,065 international organisations.

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Meetings industry in Warsaw in 2021

Number and characteristics of events*1

The WOT Warsaw Convention Bureau collected information on 2,914 events in 2021, which brought together a total of 973,611 participants in Warsaw. For some of these events (2,750 to be exact), detailed statistics are available, which Z-Factor collected between September and December 2021 from over 35 major conference hotels in the capital.

Key indicators of the Warsaw conference market 09.2021 - 12.2021

- Total number of events: 2,750
- Total number of event attendees: 244,984
- Average number of events per day: 7.5
- Average event length: 1.6 days
- Average number of event attendees: 89.1

Number of events by hotel category 09.2021 - 12.2021

- 1-day: 51%
- 2-days: 28.8%
- 3-days: 6.7%
- 4-days and longer: 8.3%

Number of events by length of event 09.2021 - 12.2021

- 1-day: 3.7%
- 2-days: 32.8%
- 3-days: 64.5%
- 4-days and longer: 3.7%

Average length of event by hotel category 09.2021 - 12.2021

- 1-day: 6.7%
- 2-days: 72.4%
- 3-days: 63.5%
- 4-days and longer: 11.9%

Average number of event attendees:

- 1-day: 26.7%
- 2-days: 64.5%
- 3-days: 67.3%
- 4-days and longer: 64.5%

Customer segments (corporate, association, public institution) 09.2021 - 12.2021

- Corporate: 81.7%
- Association: 12%
- Public Institution: 13.8%

Top performance by industry 09.2021 - 12.2021

- Highest number of events: 497
- Most space used (in m²): 151,368
- Highest number of participants: 47,278

Pharmaceuticals/Medicine/Health & Beauty

Highest number of events

Most space used (in m²)

Highest number of participants

Corporate

Total number of events

Space used

Average number of participants per weekday 09.2021 - 12.2021

- Monday: 2,000
- Tuesday: 3,000
- Wednesday: 4,000
- Thursday: 5,000
- Friday: 2,609
- Saturday: 4,141
- Sunday: 2,987

Average number of events per weekday 09.2021 - 12.2021

- Monday: 497
- Tuesday: 759
- Wednesday: 812
- Thursday: 884
- Friday: 772
- Saturday: 475
- Sunday: 287

Total number of event attendees

- 1-day: 2,987
- 2-days: 884
- 3-days: 759
- 4-days and longer: 497

Total number of events:

- 1-day: 812
- 2-days: 759
- 3-days: 475
- 4-days and longer: 2,987

*1: The number of events and attendees may not add up due to rounding.
Promotion of Warsaw tourism through the activities of Warsaw Tourist Office

Tourist services at Warsaw Tourist Information points
In 2021, there were two Warsaw Tourist Information points operating in Warsaw: at the Palace of Culture and Science and the Praga Koneser Centre, open 7 days a week.

Visitors using Warsaw Tourist Information centres* in 2021

<table>
<thead>
<tr>
<th>Visitors</th>
<th>↑ 37% in comparison to 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>60,118</td>
<td>foreign 22,680</td>
</tr>
</tbody>
</table>

Users of Warsaw Tourist Information centres by month in 2019-2021

<table>
<thead>
<tr>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>5,000</td>
<td>10,000</td>
<td>15,000</td>
<td>20,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

91% of tourists in 2021 had a positive opinion of tourist information

Official tourist portal of Warsaw www.go2warsaw.pl
The website is available in Polish and three foreign languages: English, German, and Spanish.

1,043,349 users Visited the site in 2021
Compared to 2020 ↑ by 82.5%

Countries with the highest number of visitors to the site:
- Great Britain 17,167
- USA 20,819
- Spain 22,314
- Germany 33,322
- Poland 105,990

When visiting the go2warsaw.pl website, users used
- 69% mobile phone
- 29% computer
- 2% tablet

How do users find go2warsaw.pl most often?
- 87% searching for content in search engines
- 7% direct entries after entering website address in browser
- 4% entries from social networking sites
- 1.5% visits from links placed on other websites

Countries with the most followers:
- Poland 31% 48,521
- Italy 8% 12,165
- USA 6% 8,732
- UK 5% 7,499
- Spain 4% 5,898

Number of followers
- 2020 149,912
- 2021 157,025 ↑ 5%

Posts with the most likes

Social media promotion
The Warsaw Tourist Office ran Warsaw profiles on Facebook, Instagram, Twitter, and Youtube in 2021 all under the name Go2Warsaw.

Facebook
Number of posts in 2021
- 2020 12,202
- 2021 376
### Instagram

**Number of followers**

- 2020: 78,939
- 2021: 87,502  \(\uparrow 11\%\)

**Countries with the most followers:**

- Poland: 59%
- Germany: 2%
- Italy: 3%
- UK: 3%
- USA: 5%
- Others: 11%

547  \(\uparrow\) Number of posts in 2021

### Twitter

**Number of followers**

- 2020: 13,011
- 2021: 13,973  \(\uparrow 7\%\)

**Number of posts in 2021:** 891

### Youtube

**Number of subscribers**

- 2020: 1,403
- 2021: \(\uparrow\) 1,403

**Number of posts in 2021:** 29

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**Posts with the most likes:**

- [Image 1](image1)
- [Image 2](image2)
- [Image 3](image3)

**Posts with the most views:**

- [Image 4](image4)
- [Image 5](image5)
- [Image 6](image6)
Organised press visits in 2021:

<table>
<thead>
<tr>
<th>Country</th>
<th>Visits for Press Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>44</td>
</tr>
<tr>
<td>France</td>
<td>185</td>
</tr>
<tr>
<td>Spain</td>
<td>11</td>
</tr>
<tr>
<td>Germany</td>
<td>6</td>
</tr>
<tr>
<td>France</td>
<td>6</td>
</tr>
<tr>
<td>Spain</td>
<td>6</td>
</tr>
</tbody>
</table>

Most press visits took place between May and October 2021

Number of guests attending press visits in 2021: 185

Top 3 countries from which guests came for whom most visits were organised:

- Germany: 11 visits
- France: 6 visits
- Spain: 6 visits

Selected results of press visits

Italian TV Alma TV programme about Warsaw’s tourist attractions Andata e Ritoro In Viaggio con Corrado Ruggeri

Ideat (France)
Circulation: 95,383 copies, Reach: 600,000 readers

Elle Decoration (France)
Circulation: 191,889 copies, Reach: 2,083,000 readers, Article value: EUR 21,600

Salta Conmigo (Spain)
https://saltaconmigo.com/blog/ Reach: 540,000 visitors/month

Johannes Hilsch @bokehm0n Number of followers IG: 558K

Natalie Roch @nathalie_wanders Number of followers IG: 268K

Promotion campaigns:

Open Up to Europe Campaign
Organised by the European Travel Commission in cooperation with the Polish Tourist Organisation and Polish cities to encourage Europeans to travel in Europe.

As part of the campaign, a website promoting selected European destinations was created and promotional work was undertaken in social media and on web portals on the markets of selected destinations.

Warsaw was promoted on the German and UK markets

1,311,531 The campaign delivered 1,311,531 displays in both markets with a click-through rate (CTR) of 0.20%

166,294 The campaign reached a total of 166,294 users in Germany and the UK

1,264 From Adra Impact data – 1,264 bookings resulting from the campaign (hotel and flight bookings of users reached by the campaign)
**InstaGuide to Warsaw campaign**

Campaign aimed at encouraging Instagram users to collectively create an InstaGuide on the Warsaw @Go2Warsaw profile, showcasing places where unique photos can be taken.

The campaign involved collaboration with editors at Kmag, Nowa Warszawa and F5, radio and influencers @Weekender_girl, @zyciepopracy and @thetravellingonion.

The guide was featured in the directory tab and was promoted throughout the campaign in the form of organic InstaStories, publications from editors and influencers, editorials and paid advertising.

Part of the campaign was a competition for Instagram users who could win attractive Warsaw-themed prizes.

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**Pearls of Warsaw Competition**

The competition aimed to collect, describe and promote walking routes around Warsaw’s lesser-known attractions, located off the beaten track in different districts of the city.

In cooperation with the Warsaw Tourist Organisation, it was possible to give away valuable and unique prizes to the finalists.

A total of 60 entries were received, from which the jury selected 10 finalists. A full list of the finalists’ walking routes with descriptions and photos, a list of the competition winners and presentations of partners and sponsors can be found at https://go2.warsaw.pl/perelki-warszawy/.

As part of the competition, the ‘Pearls of Warsaw’ Facebook group was also created where users can share information about interesting places in Warsaw, pearls that are often hidden and little known, but attractive for tourists.

The competition was promoted in the social media as well as on Warsaw fora and in Warsaw groups, on ZTM public transport public transport and on screens in the Świętokrzyska Metro station.

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### Reach of campaign content on Instagram

<table>
<thead>
<tr>
<th>Number of impressions of advertising posts on Instagram</th>
<th>Number of impressions of editorial and influencer publications</th>
</tr>
</thead>
<tbody>
<tr>
<td>598,320</td>
<td>518,400</td>
</tr>
</tbody>
</table>

### Reach of campaign content on Instagram

<table>
<thead>
<tr>
<th>Reach of campaign content on Instagram</th>
<th>Reach for #InstaPrzewodnikPoWarszawie</th>
</tr>
</thead>
<tbody>
<tr>
<td>248,643</td>
<td>233,918</td>
</tr>
</tbody>
</table>

### Value of the campaign

<table>
<thead>
<tr>
<th>PLN 117,397</th>
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</thead>
</table>

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### Publication of 3 advertising campaigns on Facebook

<table>
<thead>
<tr>
<th>Total reach of ads 300,000 people</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approximately 600,000 impressions</td>
</tr>
<tr>
<td>Almost 8,000 hits on competition page from ads</td>
</tr>
<tr>
<td>About 200 comments appeared under the advertising posts, about 900 positive reactions</td>
</tr>
</tbody>
</table>

After the competition, spots were produced with the winners presenting the best routes.