

# Poland

## Tourism in the economy

The total value of the tourism economy in Poland was estimated at PLN 110.3 billion in 2016, a rise of 7.7% over 2015. This equates to a contribution of 6% to Poland's GDP.

International visitor arrivals increased by 3.6% to 80.5 million in 2016. This includes 17.5 million tourist arrivals, a rise of 4.8% over 2015 and a new record for Poland since joining the Europe's Schengen Area in 2007. Germany remains the largest source market, accounting for 36% of international tourist arrivals. International tourism receipts increased by 6.9% to reach PLN 57.6 billion in 2016, accounting for 6% of total export earnings.

The number of domestic trips totalled 43.5 million in 2016, a rise of around 9% on 2015. A majority of domestic trips were short visits of 2-4 days (60.9%). Revenues from domestic tourism increased by 17.8% to PLN 21.8 billion in 2016.

In 2015, 252 300 people were employed in the accommodation and catering sector, compared with 248 700 in 2014.

## Tourism governance and funding

The Ministry of Sport and Tourism (the "Ministry") is responsible for tourism-related matters, including management and regulation of tourism in Poland and the Polish Tourism Organisation (POT).

The main activities of POT include: the promotion of Poland as an attractive tourism destination; operation and development of domestic and international tourism information systems; and the initiation, assessment and support for plans to develop, renovate or rejuvenate tourist infrastructure. POT has 14 international offices in important current and future source markets.

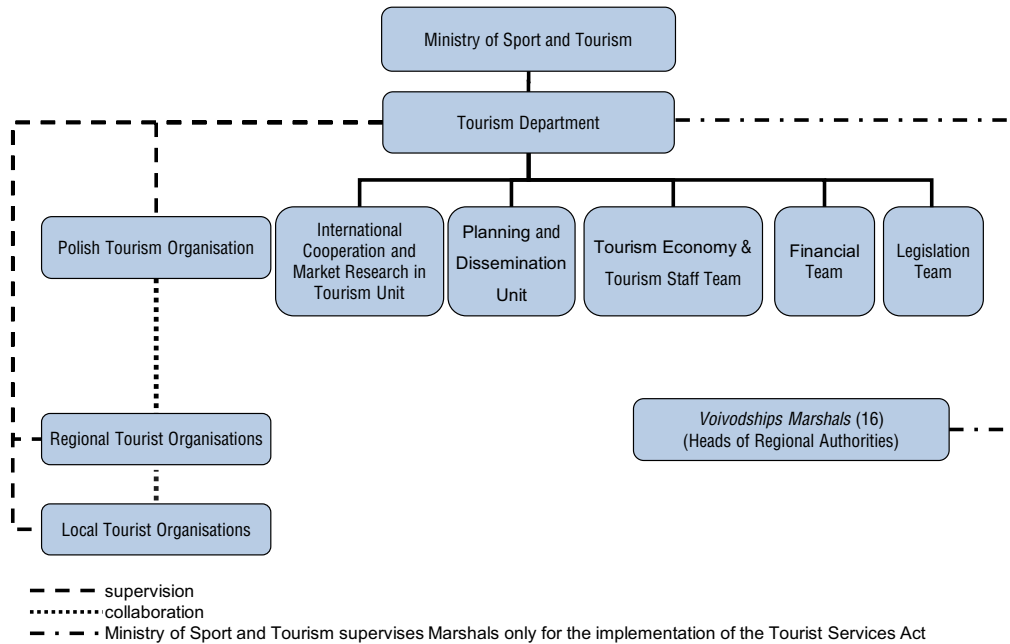
Many aspects of national policy that affect tourism reside outside the responsibility of the Ministry, while many tasks affecting tourism development fall within the remit of regional and local governments. POT also co-operates with regional and local tourism organisations and autonomous bodies involved in tourism promotion and development at a regional and local level, based on a partnership of equal rights.

At sub-national level, the primary role in tourism development is played by regional governments (*Voivodships*) and local governments (*Poviats* at the county level and *Gminas* at the municipality level). Local or regional tasks fall into two groups: i) public sector tasks that are not allocated elsewhere by relevant legislation, and ii) tasks commissioned by the National Government Administration.

Commissioned tasks include supervision, registration, licensing and compliance with various standards of travel agents and tour operators, mountain guides, and also the classification of hotel facilities.

Municipalities are responsible for keeping registers of campsites and non-hotel accommodation service providers, inspecting accommodation facilities, and applying sanctions if necessary.

### Poland: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Sport and Tourism, 2018.

In 2016, the budget of the National Tourism Administration amounted to PLN 50.3 million, including PLN 39.4 million for the Polish Tourist Organisation. In addition, specific tourism sector projects were supported by EU structural funds during 2014-20. The above figures do not include regional and local government budgets, which together accounted for additional spending of PLN 198 million on tourism in 2016.

## Tourism policies and programmes

The main objective of Poland's national policy is to strengthen the development of competitive and innovative tourism through the support of enterprises, organisations, institutions and initiatives in the tourism sector, while respecting the principles of sustainable development.

This comprehensive approach is focused on the following priority areas:

- Competitive and innovative tourism,
- Modern tourism management systems,
- Skilled workforce for the tourism industry,
- Contribution of tourism to regional and local development, enhancing social and economic cohesion and improving quality of life.

The “Programme for Tourism Development until 2020” sets out operational objectives and specific tasks for the sector, identifying those responsible for coordination, delivery and funding.

One of the main projects developed to implement the programme and commercialise the Polish tourist brand is the House of Polish Tourism Territorial Brands (*Dom Polskich Turystycznych Marek Terytorialnych*). The House will coordinate tourism policies by creating systematic and comprehensive solutions. It will provide organisational, financial and legal tools for integration, coordination, commercialisation and internationalisation of Polish tourism products that are based on the cultural and natural potential of the country. This creates an opportunity for rural areas to be better integrated within the development process of the country, to ensure that they provide the necessary public goods, and are marketed as unique landscapes with cultural and natural assets.

The House of Polish Tourism Territorial Brands is among the strategic projects to be implemented under the Responsible Development Strategy adopted by the Council of Ministers in February 2017.

Increased interest in domestic tourism and short break holidays inspired the Polish Ministry of Sport and Tourism to introduce a new marketing campaign in 2016 called “Poland See More – Weekend at half price”. Over 400 partners, including mines, museums, theme parks, zoos, castles, palaces, theatres, hotels, hostels, and spa resorts, developed special half-price offers for a chosen weekend. Both public and private sectors were involved in this new form of regional co-operation which marks a new approach to promoting both acclaimed and lesser-known tourist attractions. The first campaign led to over 60 000 tourists taking advantage of the special offers. The Polish Tourist Organisation went on to arrange a second weekend, which saw over 77 500 people choosing to benefit from the offers. Similar weekends are now scheduled to take place twice a year.

## Statistical profile

Table 1. Poland: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	17 656	18 158	19 614	21 252	23 730
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	50 138	50 488	53 587	57 477	63 815
Hotels and similar establishments	21 466	22 605	24 982	27 502	31 405
Specialised establishments	..	..	..	..	..
Other collective establishments	26 775	25 928	26 545	27 676	29 734
Private accommodation	1 898	1 955	2 060	2 299	2 676
<b>Inbound tourism</b>					
Total international arrivals	67 390	72 310	73 750	77 743	80 476
Overnight visitors (tourists)	14 840	15 800	16 000	16 728	17 471
Same-day visitors (excursionists)	52 550	56 510	57 750	61 015	63 005
<b>Top markets</b>					
Germany	4 800	5 280	5 743	6 012	6 288
Ukraine	1 930	2 110	1 072	1 198	1 265
Russian Federation	670	765	1 003	873	801
United Kingdom	..	..	664	753	797
Belarus	1 620	1 530	811	801	715
Nights in all types of accommodation	11 877	12 471	12 992	13 758	15 579
Hotels and similar establishments	9 425	10 129	10 667	11 302	12 918
Specialised establishments	..	..	..	..	..
Other collective establishments	2 330	2 232	2 193	2 308	2 452
Private accommodation	122	110	132	148	209
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	10 000	12 950	10 300	10 900	11 300
Same-day visitors (excursionists)	..	..	..	..	..
<b>Top destinations</b>					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION PLN</b>					
<b>Inbound tourism</b>					
Total international receipts	38 798	39 359	40 685	42 770	43 218 p
International travel receipts	35 849	35 919	37 298	39 454	43 218 p
International passenger transport receipts	2 949	3 440	3 387	3 316	..
<b>Outbound tourism</b>					
Total international expenditure	29 808	28 938	30 056	32 117	31 411 p
International travel expenditure	28 608	27 950	27 934	29 913	31 411 p
International passenger transport expenditure	1 200	988	2 122	2 204	..

.. Not available; | Break in series; p Provisional data

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933640956>


Table 2. **Poland: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed <sup>1</sup>				
	2016	2012	2013	2014	2015	2016
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>22 445</b>	..	..	..	..	..
Accommodation services for visitors	10 509	174 811	170 061	171 138	172 043	180 707
Hotels and similar establishments	3 965	..	..	..	..	..
Food and beverage serving industry	7 690	..	..	..	..	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	4 246	..	..	..	..	..
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available

1. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933640975>Table 3. **Poland: Internal tourism consumption**

Million PLN

	2013		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>18 385</b>	<b>35 450</b>	<b>60 880</b>
Tourism characteristic products	13 172	14 052	30 311
Accommodation services for visitors	4 753	3 734	10 527
Food and beverage serving services	3 822	5 005	8 827
Passenger transport services	2 894	2 786	6 461
Air passenger transport services	2 339	2 444	5 030
Railways passenger transport services	293	59	711
Road passenger transport services	258	217	650
Water passenger transport services	4	66	70
Passenger transport supporting services	..	..	..
Transport equipment rental services	0	0	0
Travel agencies and other reservation services industry	1 562	361	2 038
Cultural services	141	2 166	2 458
Sports and recreation services	..	..	..
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	5 213	21 398	30 569
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933640994>



**From:**  
**OECD Tourism Trends and Policies 2018**

**Access the complete publication at:**  
<https://doi.org/10.1787/tour-2018-en>

**Please cite this chapter as:**

OECD (2018), "Poland", in *OECD Tourism Trends and Policies 2018*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2018-33-en>

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document and any map included herein are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area.

You can copy, download or print OECD content for your own use, and you can include excerpts from OECD publications, databases and multimedia products in your own documents, presentations, blogs, websites and teaching materials, provided that suitable acknowledgment of OECD as source and copyright owner is given. All requests for public or commercial use and translation rights should be submitted to [rights@oecd.org](mailto:rights@oecd.org). Requests for permission to photocopy portions of this material for public or commercial use shall be addressed directly to the Copyright Clearance Center (CCC) at [info@copyright.com](mailto:info@copyright.com) or the Centre français d'exploitation du droit de copie (CFC) at [contact@cfcopies.com](mailto:contact@cfcopies.com).