

Polska



Tourism assets of Poland

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Poland becomes increasingly attractive as a tourist destination. Its natural environment, modern infrastructure and improving access to culture and national heritage of exceptional value make the country popular with international tourists.

While hard currency earnings in the tourism segment are on the increase, some statistics show a decline in domestic travel by Poles themselves.

The most visited tourist destinations in Poland include the Tatra, Karkonosze, Stołowe and Pieniny Mountains; Białowieża Forest; Masurian Lake District and the Wolin National Park. The most popular cities are Kraków, Wrocław, Gdańsk, Warsaw, Poznań, Lublin and Toruń.



Reports by the Central Statistical Office of Poland (CSO) indicate that the tourism potential of a particular area is primarily influenced by its environmental and cultural assets, tourism infrastructure and accessibility. Usually it is assessed by the number of tourist accommodation establishments, whereas their use is measured by such

indices as the number of visitors, the number of overnight stays and the average length of stay in the establishments.

The analysis by the CSO shows that in 2013 West Pomeranian and Lesser Poland Provinces were the most developed regions in terms of tourism facilities.

West Pomeranian Province ranks first in terms of the number of tourist accommodation establishments, the number of tourists and overnight stays per capita. The indicators for the area exceed the national average by several times. The region owes its high rank mainly to its seaside location. Lesser Poland and Pomeranian Provinces also come close to the top in terms of these indicators.

Eastern provinces as well as Opole, Lubuskie and Łódź Provinces are at the bottom in terms of overnight stays, accounting for 0.9% - 3.6% of stays in the total accommodation establishments examined in Poland.

Generally, the following provinces ranked best in terms of their tourism potential: Lesser Poland (as regards museums and hiking trails), Lower Silesian (as for the number of historic sites) and Świętokrzyskie (by virtue of its natural assets).



Poland is one of Europe's most heavily forested regions, with forests covering almost 30% of the country's total area. Lands of particular natural value are protected within 23 national parks with the area of nearly 317,000 ha, enjoyed by around 11 million visitors every year. Natural sites protected by Natura 2000 include bat refuges of the Beskid Wyspowy mountain range, the Vistula Gorge near Kazimierz, the Bieszczady Mountains and the Middle Noteć Valley with Bydgoszcz Canal.



According to the information on the implementation of Interministerial Task Force for Coordination of the Government Role set out in 2012 in the "Directions for Tourism Development until 2015", regional directorates for environmental protection promote environmental and landscape assets of protected areas whose environmental value translates into tourist attractiveness of the region. For that purpose, they increasingly use the Internet, printed publications and meet with local communities for whom tourism has become a significant source of income. In landscape parks, educational and cycling trails are constantly developed and modernised. Also observation towers for tourists and birdwatchers are constructed.

By 31 December 2012, 1,390 kilometres of tourist trails were developed under various projects, mostly in

Greater Poland (629 km) and Silesian (514 km) Provinces.

Tourism development is stimulated largely by activities undertaken by the Ministry of Culture. While state administration, local government and community -based cultural organisations are determined to adapt historic sites for commercial purposes to be used by tourists, they are also willing to respect their historical value.

In the report on the implementation of the “Directions for Tourism Development until 2015”, the former Minister of Culture Bogdan Zdrojewski stated that requirements of modern-day tourism should not degrade or depreciate historical, artistic or cultural values of the sites. He emphasized the fact that harmony between tradition and modernity is a prerequisite for the balance between conservation of historic sites and the development of tourism.

All around Poland new themed hiking routes are established, such as archaeological or architecture trails (e.g. following Romanesque, Gothic or wooden architecture sites). That way tourism gains new quality by combining physical exercise, contact with nature and discovering historic buildings and sites.

The report “Price Competitiveness of Polish Tourism Products – Summer 2014” commissioned by the Polish Tourist Organisation (PTO) compares prices of tourist services provided in Poland with those offered by our main competitors, e.g. businesses operating in the Czech Republic, Slovakia, Hungary, Germany, Lithuania, Latvia and Estonia. As pointed out by Teresa Skalska Ph.D., there are alarmingly few auxiliary services available, such as access to public swimming pools or leisure facilities and entertainment events organised at the regional level. The author of the report believes that additional services should become a matter of interest not only for private service providers, but also for regional authorities.

Tourism intensity is seasonal. The statistical data for 2013 on domestic tourism activities of Polish households indicate that the most popular destination for domestic tourism was the seaside (43.4%), followed by rural areas (27.6%) and mountains (19.4%).

The report “Tourism and Leisure Activities of Polish Households” shows a decline in the share of Poles taking short term domestic trips, i.e. lasting from two to four days (from 23.7% to 19.2%), as well as long-term domestic trips, lasting five days or longer (from 25.3% to 24.4%). As many as 26.9% of the respondents indicated financial difficulties as the main reason to refrain from travel, with other most frequently cited reasons being the lack of time due to family- and job-related duties, motor impairment and no motivation for travel.

In 2013, an average Pole spent PLN 1,116 on long-term domestic travel, which is an over 3% increase as compared with the previous year. The average expenditure per capita on short-term (two to four days) domestic travel amounted to PLN 494, i.e. 7% less than in the previous year.

The number of British citizens arriving in Poland and recorded by the Polish Border Guard was 402.5 thousand and constituted 2.8% of total arrivals, an increase by 17.8% as compared with 2012. There were 164.3 thousand visitors from Germany, accounting for 1.2% of total arrivals. In this case, a 9.8% decline occurred in comparison with the previous year.

According to a study by the PTO conducted in the first half of 2014, Poland is perceived by international tourists as noteworthy (as stated by 94% of respondents), having a rich history and heritage (94%) and lively (an opinion shared by 76% of respondents). The most frequently cited purpose and leisure opportunity associated with Poland was a visit at one of the UNESCO heritage sites, including Malbork, Wieliczka and Bochnia salt mines and Auschwitz. Other purposes for the planned arrival in Poland indicated by the respondents were sightseeing, exploring forests and national parks.



According to data from Activ Group's report "International Inbound Tourism in Poland in 2013", commissioned by the Ministry of Sport and Tourism, the number of international tourists visiting Poland in 2013 amounted to 15.8 million, a 6.8 % increase when compared to the previous year. It is estimated that tourism earnings grew by over 9% to about PLN 44.4 billion.

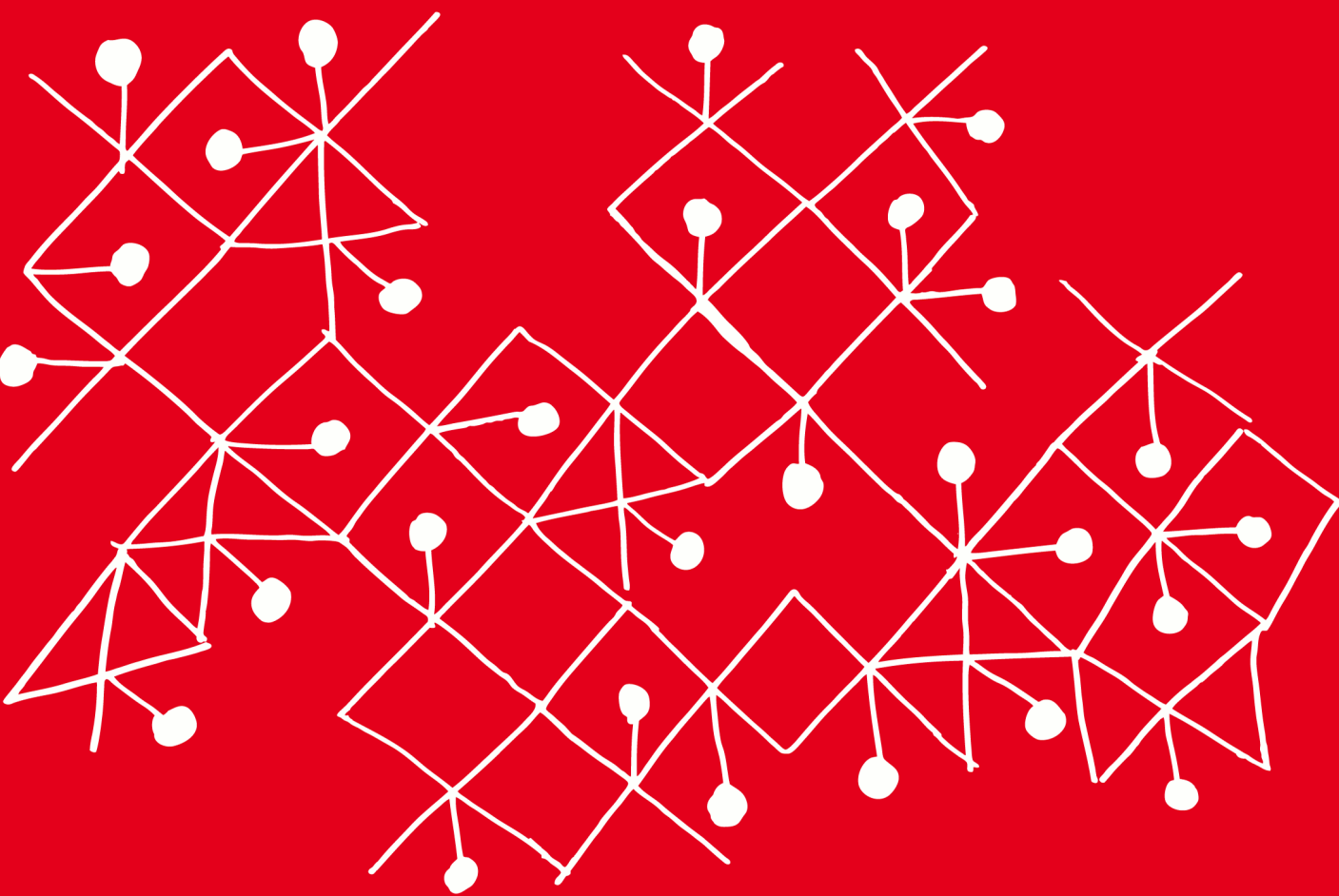
"Directions for Tourism Development until 2015" is a document adopted by the Council of Ministers on 26

September 2008. Its basic premise is to treat tourism as an industry closely linked to several development processes and to shape it in compliance with other targets of socio-economic development of the country. The document addresses the need for internal coherence of undertaken activities, but also the direct link between tourism and natural environment, culture, social development and infrastructure. The aim of the document is also to create legal, institutional, financial and employment framework for tourism development, encouraging the socio-economic development as well as to improve competitiveness of regions and the entire country, with the concurrent preservation of cultural and environmental assets.

On 1-2 October 2014 the OECD Tourism Committee held its 94th session at the National Stadium in Warsaw attended by 90 delegates from 39 countries, the first such an event organised in Poland. In his welcome speech, the Minister of Sport and Tourism Andrzej Biernat argued that the tourism industry in Poland is a perfect example of an opportunity well-seized. The minister highlighted a significant role of the OECD and other international organisations in providing up-to-date expertise, good practices and statistical data, but also recommending particular actions to improve the tourism potential of Poland.

In 2008, the Ministry of Foreign Affairs launched an official promotional portal of the Republic of Poland available at www.polska.pl. It provides an exhaustive description of tourist attractions in Poland, from the UNESCO sites to cities, historic sights, national parks, to locations worth visiting for their amazing and unique ambience. It includes information on leisure and recreation activities as well as a series of pictures and videos illustrating the Polish folklore and the country's beauty.

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