

STATE SPORT AND TOURISM ADMINISTRATION

POLISH TOURISM 1993

Warsaw February 1994



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Study commissioned at the Institute of Tourism by the State Sport and Tourism Administration

A. FOREIGN INCOMING TOURISM IN POLAND

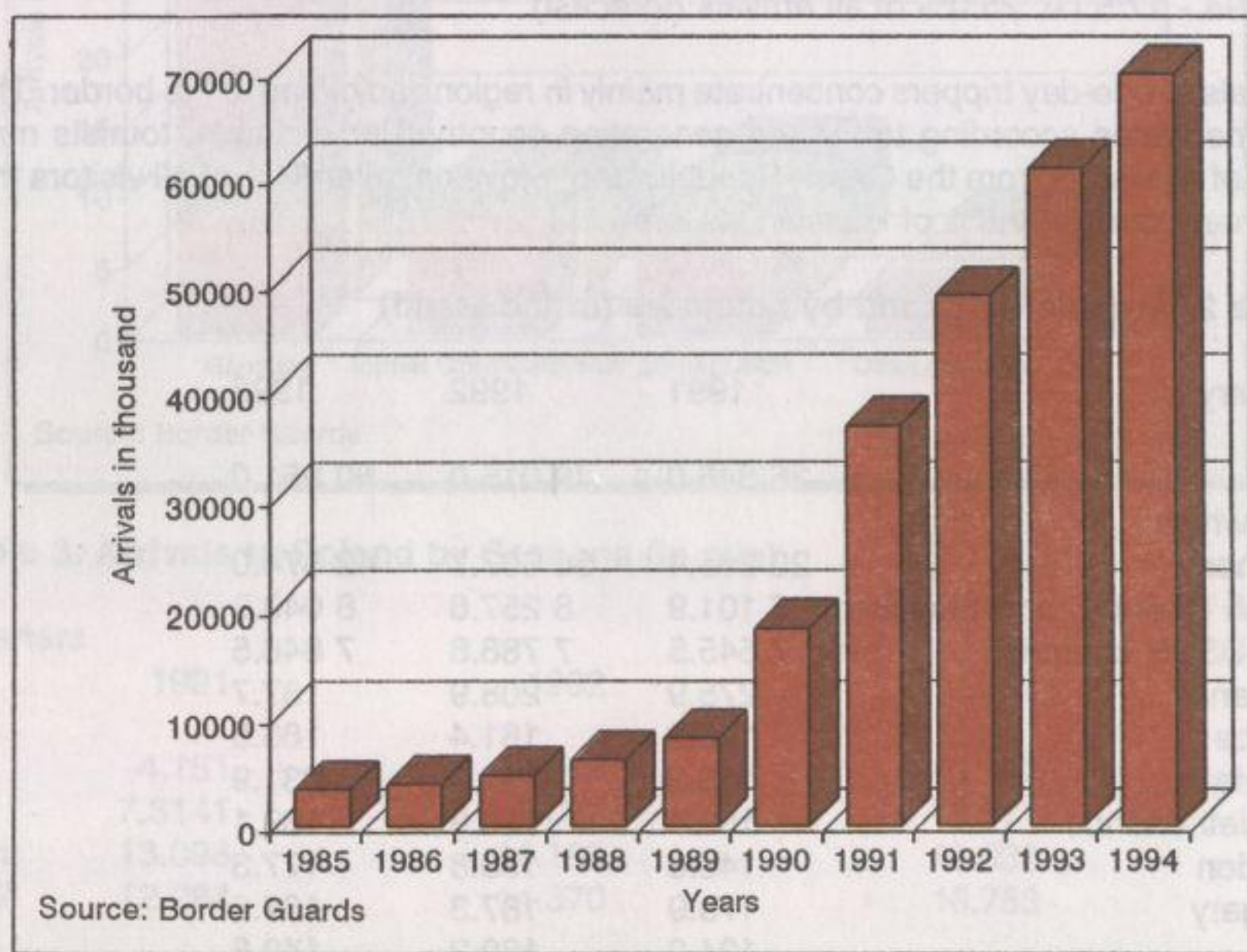
Table 1. Foreign Incoming Tourism to Poland - Total (arrivals in thousand)

Years	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994*
Arrivals in thousand	3410	3851	4776	6210	8233	18211	36846	49015	60951	70000

* forecast

Source: Border Guards Service

Fig. 1. Total Foreign Arrivals to Poland



Foreign arrivals to Poland correspond to the number of border crossings and include two categories of visitors:

- tourists (i.e. people who spend at least one night in Poland)
- one-day trippers (i.e. people who do not stay overnight in Poland)

As some people may cross the Polish border many times during a single year, the number of people who cross the border does not correspond to the real number of visitors to Poland.

Two subperiods have become distinct over the past ten years:

- 1985-1989 when foreign arrivals showed an average 25% annual growth rate,
- 1990-1992 marked with a high dynamics of arrivals. Average annual growth of arrivals was much higher at that time and amounted to 40%.

Tourist arrivals amount to 30% of all arrivals to Poland. During the past years they assumed the following level (in million):

1991 - 11.3 i.e. 31.4%
 1992 - 16.2 i.e. 33.2%
 1993 - 17.0 i.e. 27.7%
 1994 - 17.5 i.e. 25.0% of all arrivals (forecast)

Arrivals of one-day trippers concentrate mainly in regions adjoining to the border. Their volume varies according to the trip generating country. For example, tourists made 95% of all visitors from the Czech Republic and Slovakia, over 84% of all visitors from Germany, and only 8% of Russian visitors.

Table 2. Arrivals to Poland by countries (in thousand)

Country	1991	1992	1993
Total	36 846.0	49 015.0	60 951.0
in which:			
Germany	20 885.4	30 687.7	42 574.0
Czech Republic and Slovakia	6 101.9	8 257.6	8 043.3
post-USSR countries	7 545.5	7 788.8	7 846.5
Romania	275.9	208.9	187.7
France	196.9	181.4	186.5
Austria	133.2	192.8	231.9
the Netherlands	159.4	178.9	189.1
Sweden	143.6	158.8	177.3
Hungary	179.9	187.3	164.5
USA	124.0	130.2	140.8
Italy	122.7	110.6	123.5
Dania	141.6	122.3	115.3
Great Britain	84.6	145.5	104.8

Source: Border Guards Service

Foreign arrivals to Poland are mostly generated by the neighbouring countries, in which Germany generates about 70% of the total number of arrivals. A growing share of arrivals from Austria, the Netherlands, Sweden, and USA indicates a positive trend. The decline in arrivals from Great Britain in 1993 was produced by complications in air transportation to Poland.

Fig. 2. Foreigners arrivals to Poland by Countries (in mln)

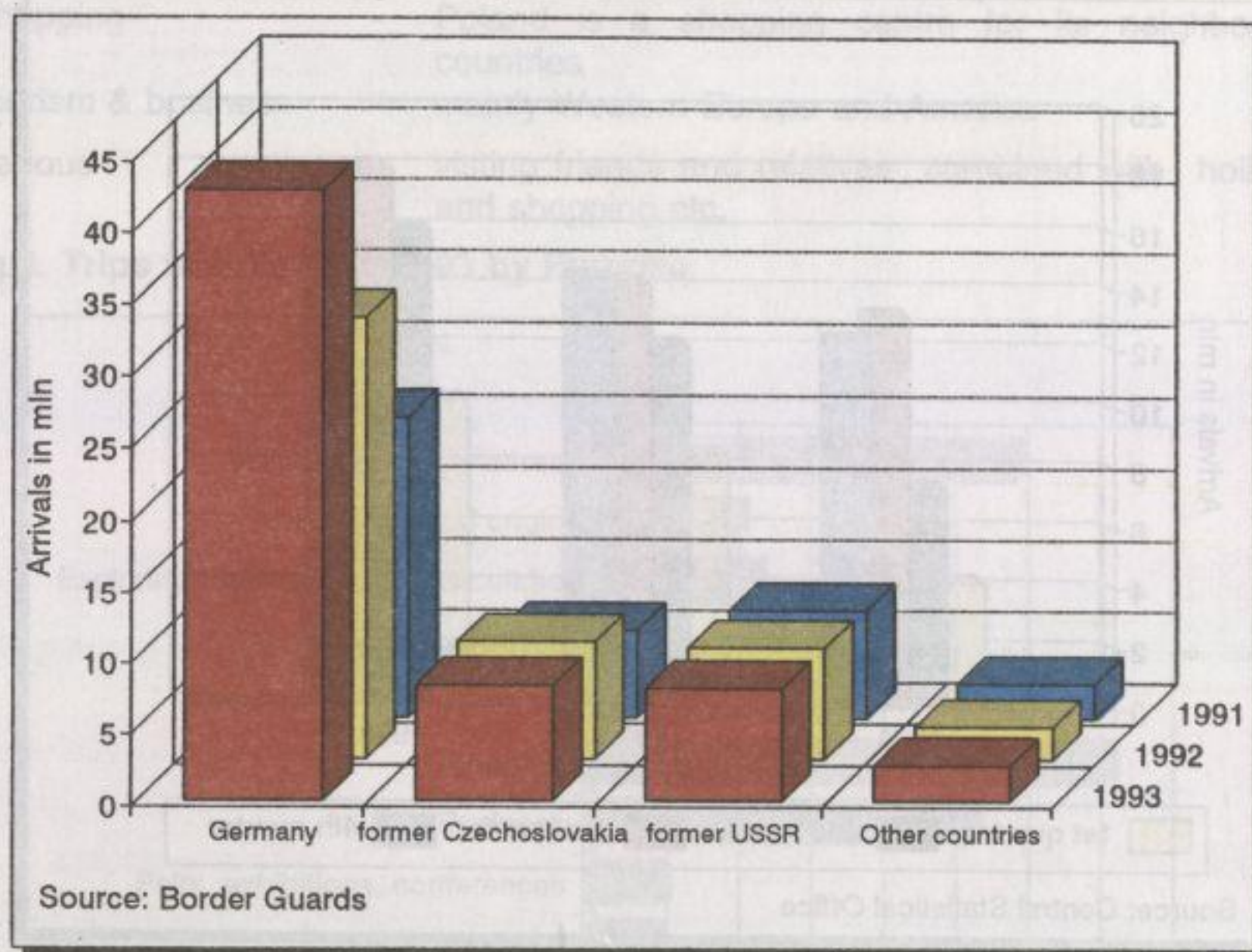
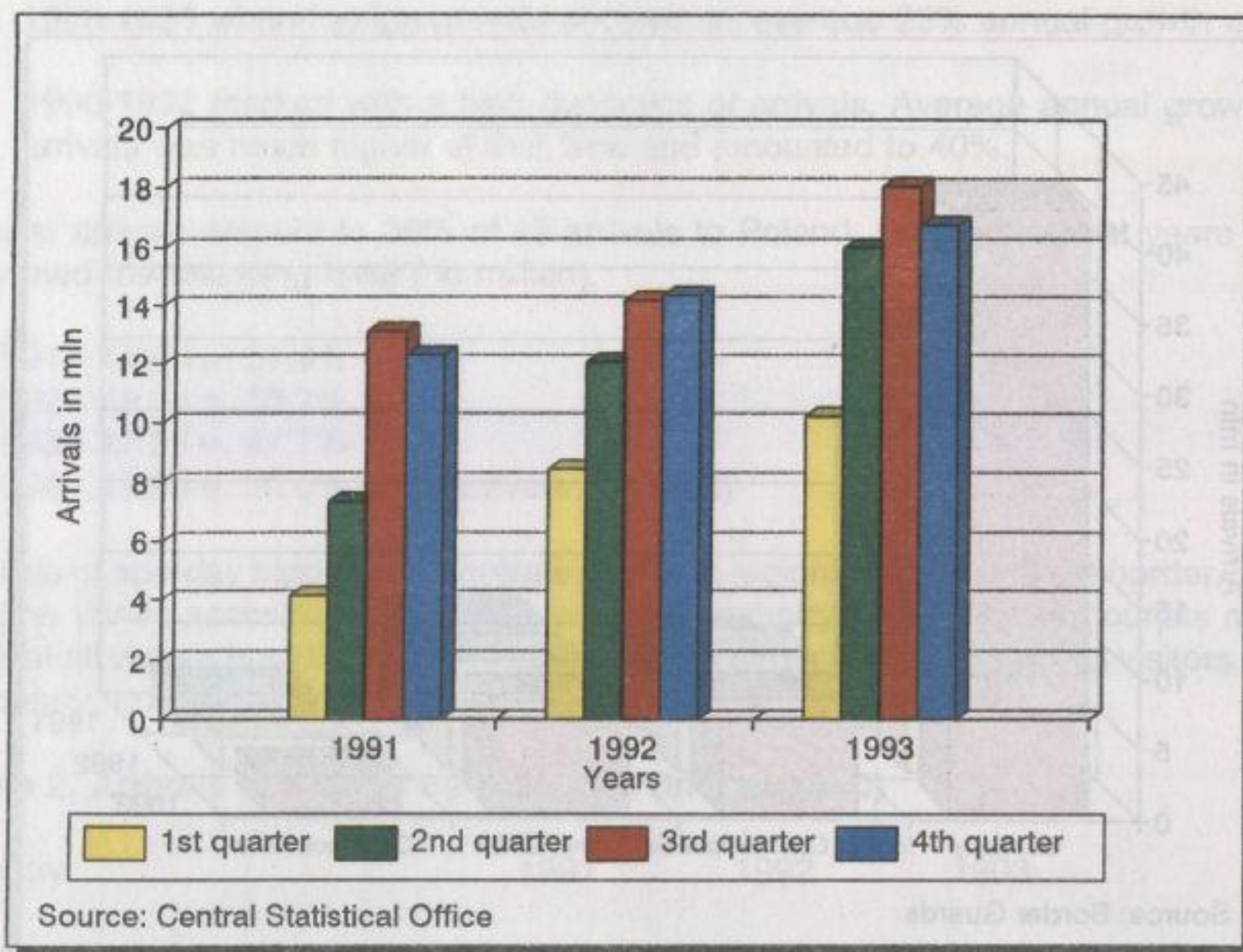


Table 3. Arrivals to Poland by Seasons (in mln)

Quarters	1991	1992	1993
I	4.151	8.419	10.191
II	7.3141	2.027	15.971
III	13.098	14.199	18.036
IV	12.284	14.370	16.753

Source: Central Statistical Office

Fig. 3. Arrivals to Poland by Seasons



Most of trips aimed at recreation and tourism take place during the third quarter of the year, whereas shopping, business, and professional trips are fairly well spread in time throughout the remaining quarters.

Table 4. Foreign Tourist Trips to Poland by Purpose

Purpose	per cent of the total arrivals *
Visiting friends and relatives	29.8
Visiting place of origin	10.7
Exploring the country and its culture	11.9
Religious purposes	5.2
Recreation, entertainment	19.6
Shopping	36.2
Business	26.7
Fairs, exhibitions, conferences	5.2
Other professional	4.8
Hobbies	3.1
Others	11.1

* estimate

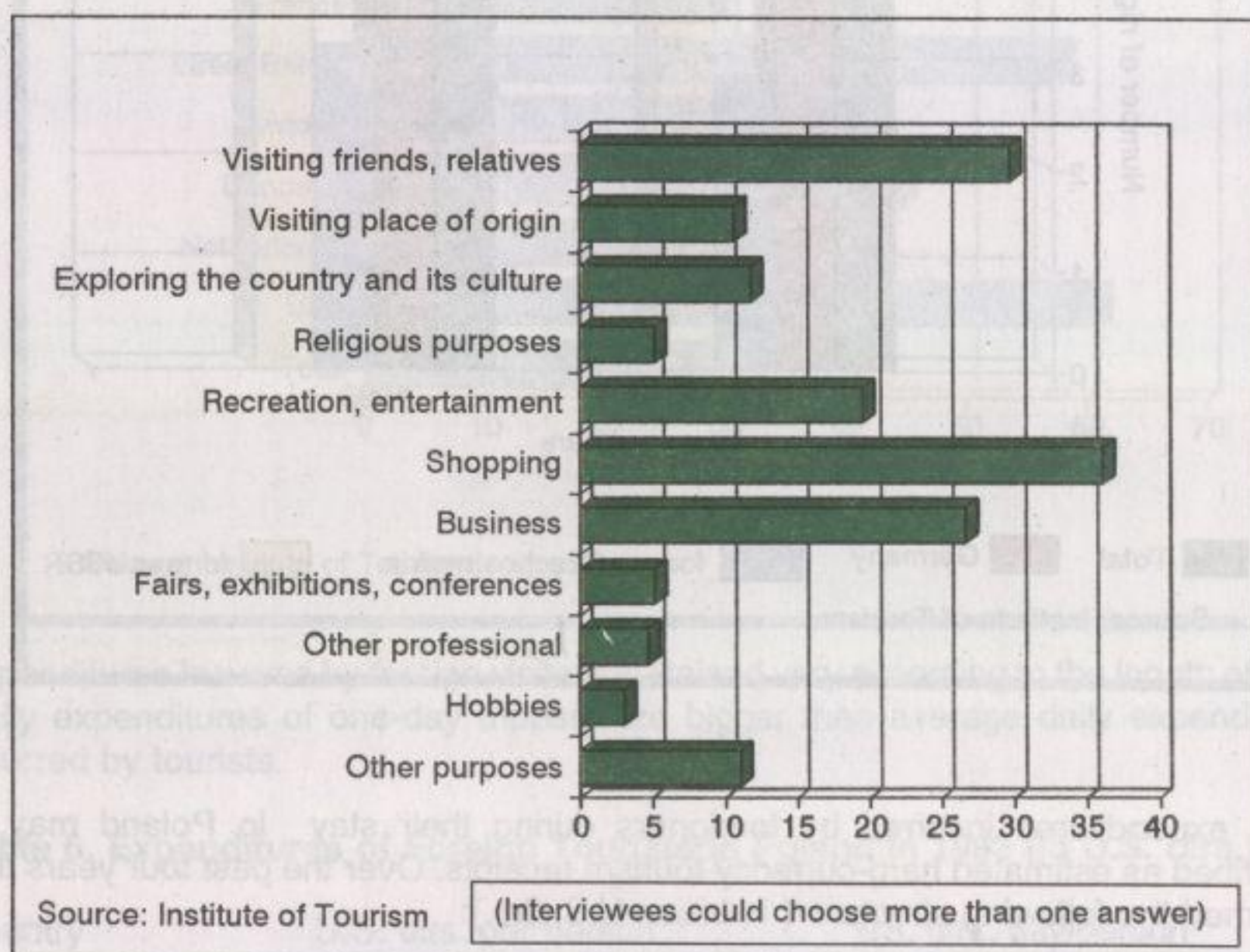
Note: total does not add up as interviewees could choose several answers

Source: Survey of the Institute of Tourism

We may distinguish main groups of foreign visitors to Poland travelling for the following purposes:

- shopping
- Poland is a shopping centre for its neighbouring countries
- tourism & business
- mainly Western Europe and America
- various
- visiting friends and relatives combined with holidays and shopping etc.

Fig.4. Trips to Poland to 1993 by Purpose



In 1992 foreign tourists spent the average 5.1 nights in Poland. The average duration has decreased in 1993 as the number of one-day trippers, the majority of whom originated from post-USSR countries, went up.

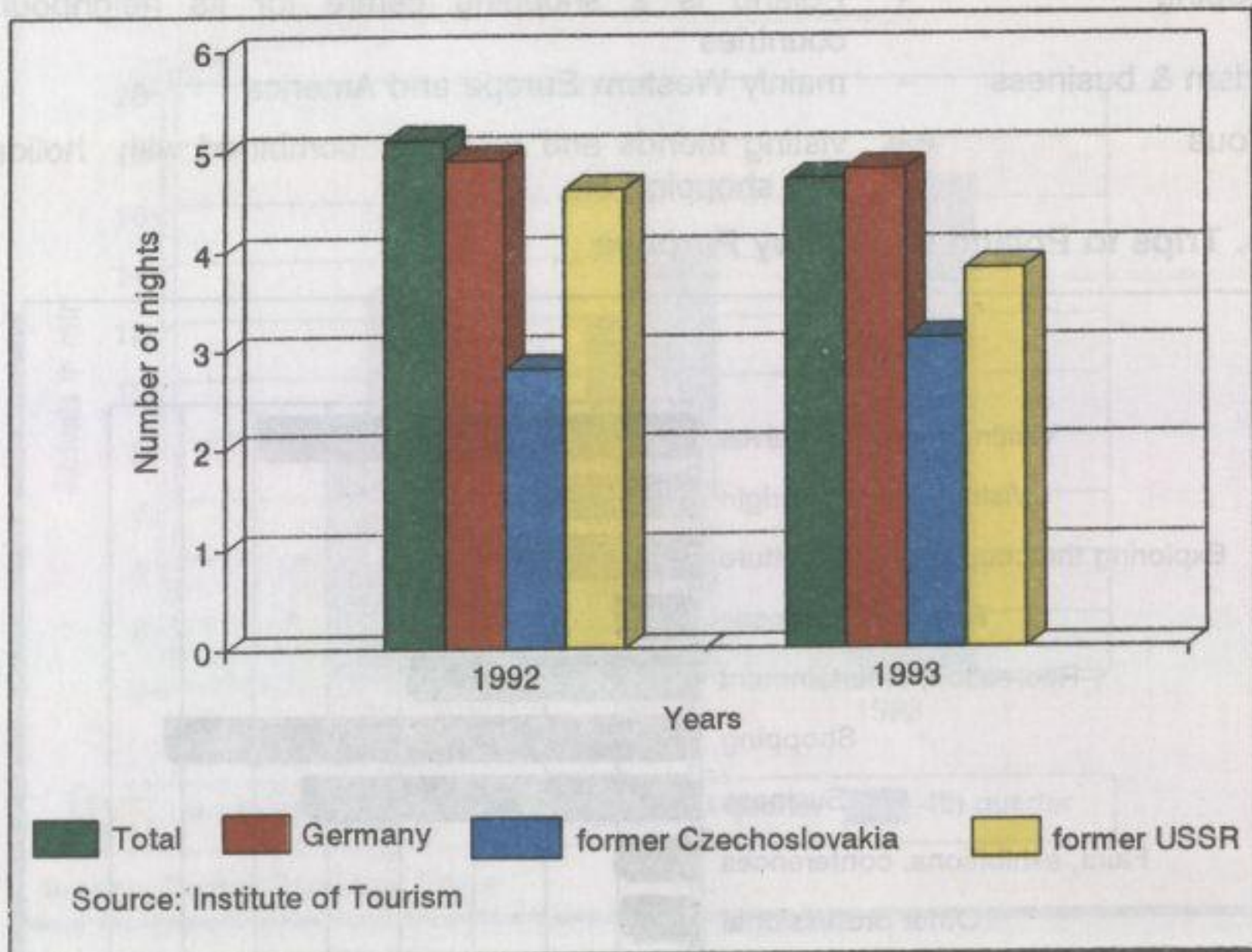
Table 5. Average Duration of Stay in Poland (number of nights)

COUNTRY	1991	1992	% of change
Total	5.1	4.7	-7.8
Germany	4.9	4.8	-2.0
Czech Republic & Slovakia	2.8	3.1	+10.7
former USSR	4.6	3.8	-17.4

* estimate

Source: Survey of the Institute of Tourism

Fig. 5. Average Duration of Stay in Poland (number of nights)



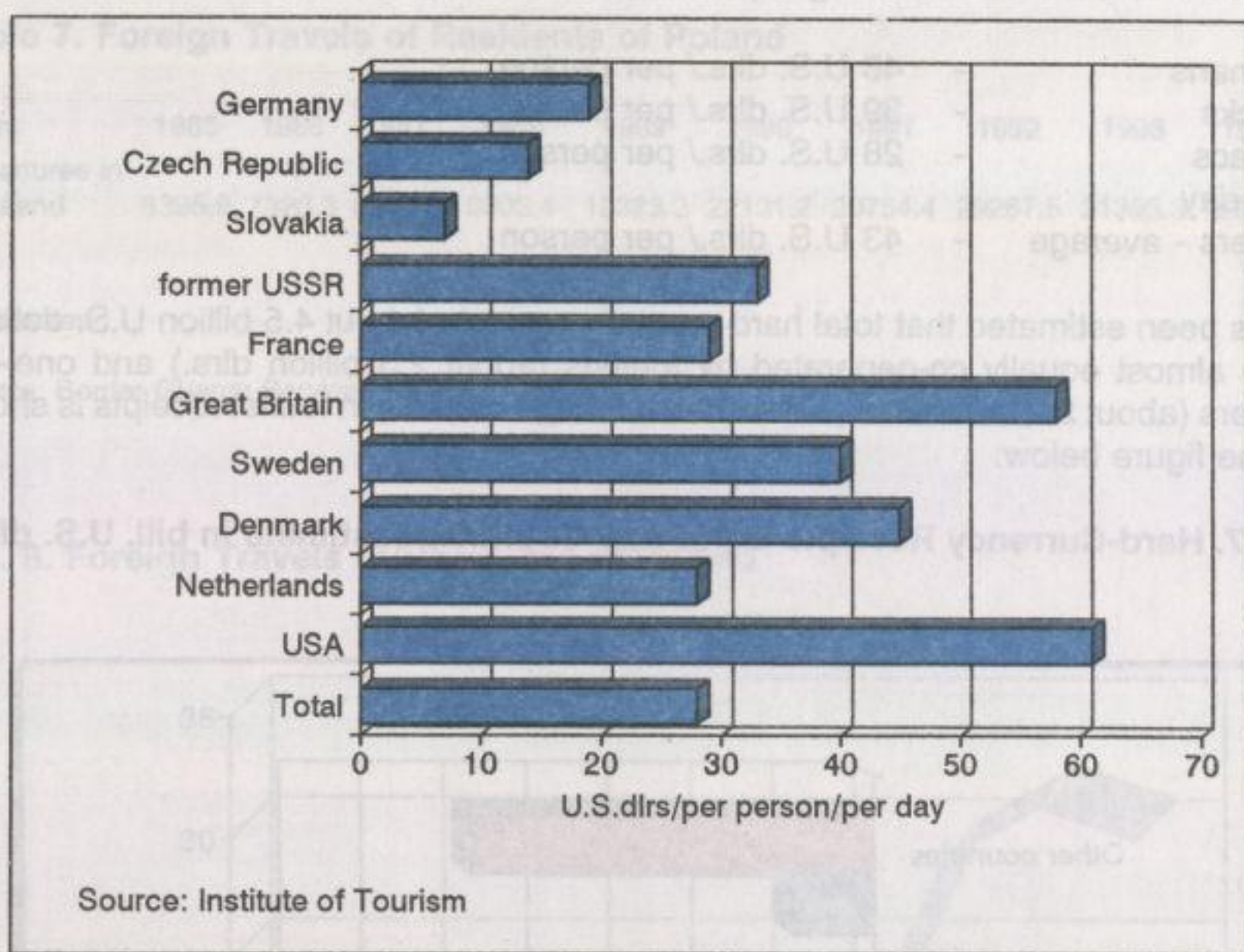
Total expenditures incurred by foreigners during their stay in Poland may be described as estimated hard-currency tourism receipts. Over the past four years they assumed the following structure (in billion U.S.dlr.):

1991 - 2.8
 1992 - 4.1, increase by 46%, as compared to the previous year
 1993 - 4.5, increase by 10%, as compared to the previous year
 1994 - 5.0, increase by 11%, as compared to the previous year (forecast)

Source: Institute of Tourism

The growth rate of foreign arrivals to Poland went up faster (Table 1) than hard-currency receipts related to tourism. If the situation were to remain like this in the future, it would signal a negative trend.

Fig. 6. Daily Expenditures of Foreign Tourists in Poland in 1993 (in U.S. dlrs.)



Expenditures incurred by foreign visitors to Poland vary according to the length of stay. Daily expenditures of one-day trippers are bigger than average daily expenditures incurred by tourists.

Table 6. Expenditures of Foreign Tourists in Poland in 1993 (in U.S. dlrs.)

Country	U.S. dlrs./per person	US. dlrs./day/person
Germany	111	19
Czech Republic	71	14
Slovakia	30	7
Post-USSR countries	160*	33*
France	195	29
Great Britain	470	58
Sweden	254	40
Denmark	311	45
the Netherlands	242	28
USA	942	61
Total	162	28

Note: Level of this subtotal was highly influenced by expenditures of Russian tourists amounting to 443 U.S. dlrs. per person

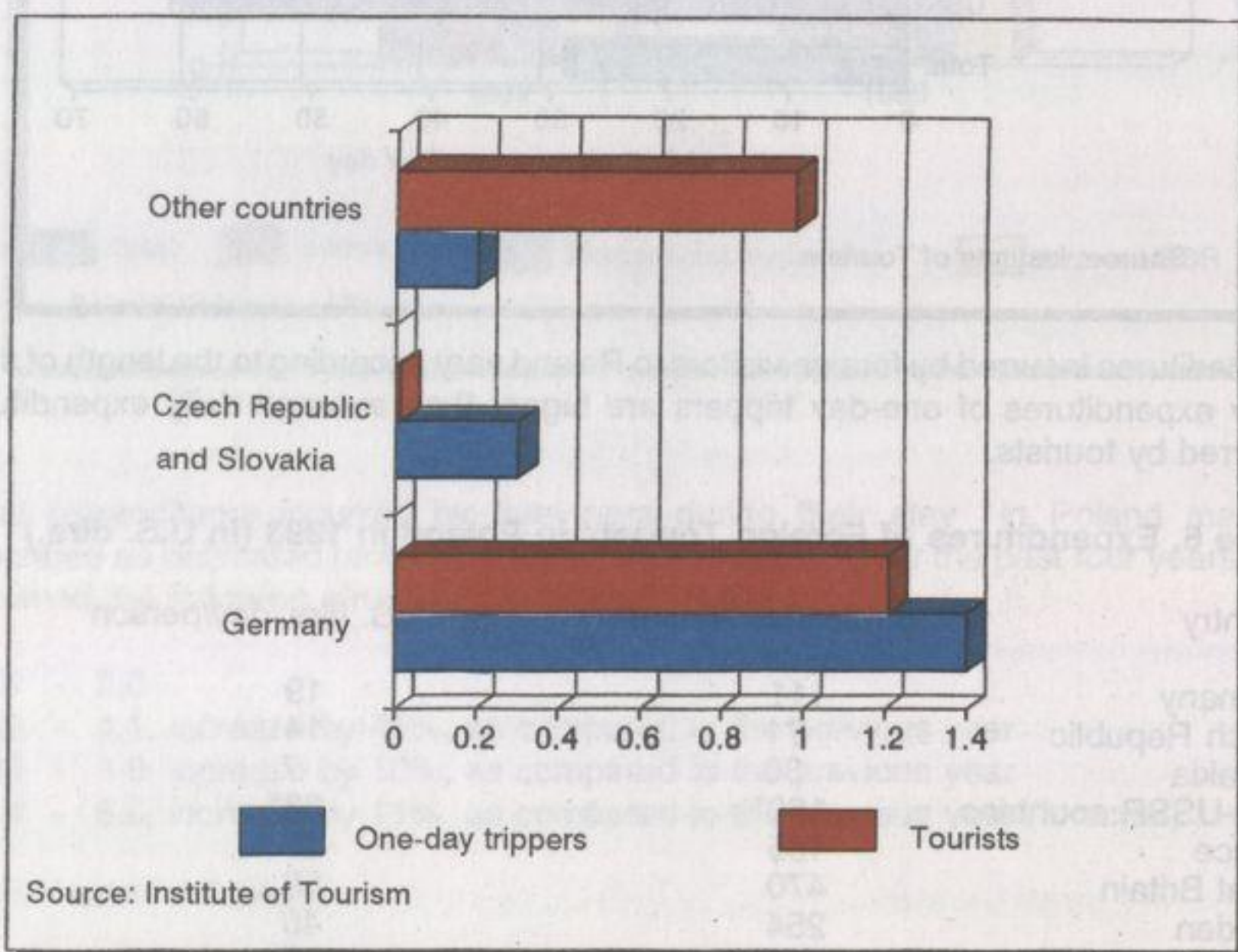
Source: Survey of the Institute of Tourism

At the same time, one-day trippers originating from the three main neighbouring countries incurred the following expenditures in Poland:

Germans	-	45 U.S. dlrs./ per person
Czecks	-	39 U.S. dlrs./ per person
Slovacs	-	28 U.S. dlrs./ per person
One-day trippers - average	-	43 U.S. dlrs./ per person

It has been estimated that total hard-currency receipts (about 4.5 billion U.S. dollars) were almost equally co-generated by tourists (about 2.3 billion dlrs.) and one-day trippers (about 2.2 billion dlrs.). The share of major markets in tourist receipts is shown on the figure below:

Fig. 7. Hard-Currency Receipts in 1993 by Countries (estimate in bill. U.S. dlrs.)



B. FOREIGN TRAVELS OF RESIDENTS OF POLAND

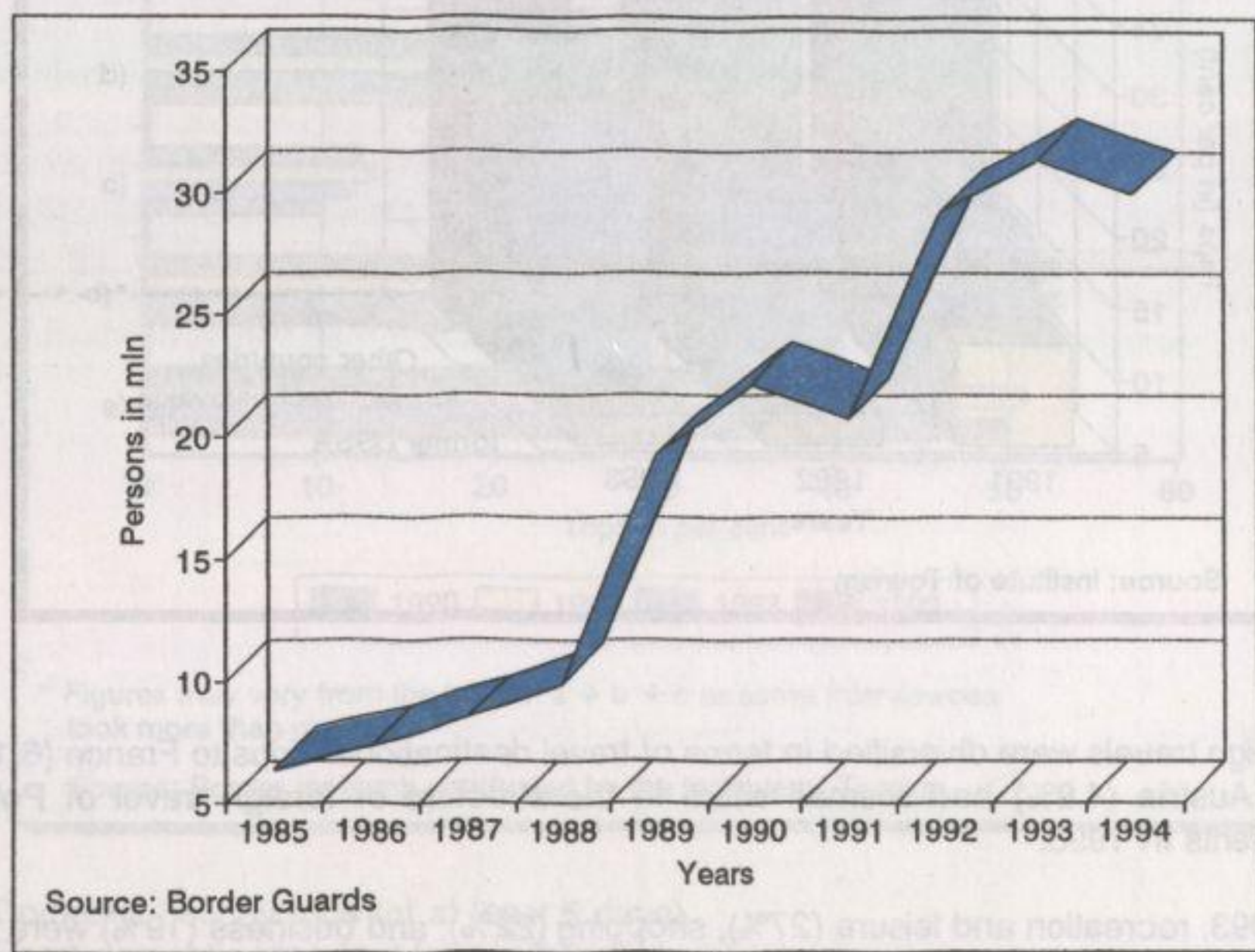
Table 7. Foreign Travels of Residents of Poland

Years	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994*
Departures in thousand	6395.8	7326.3	8508.5	9902.4	19323.2	22131.2	20754.4	29267.5	31395.3	30000.0

* estimates

Source: Border Guards Service

Fig. 8. Foreign Travels of Residents of Poland

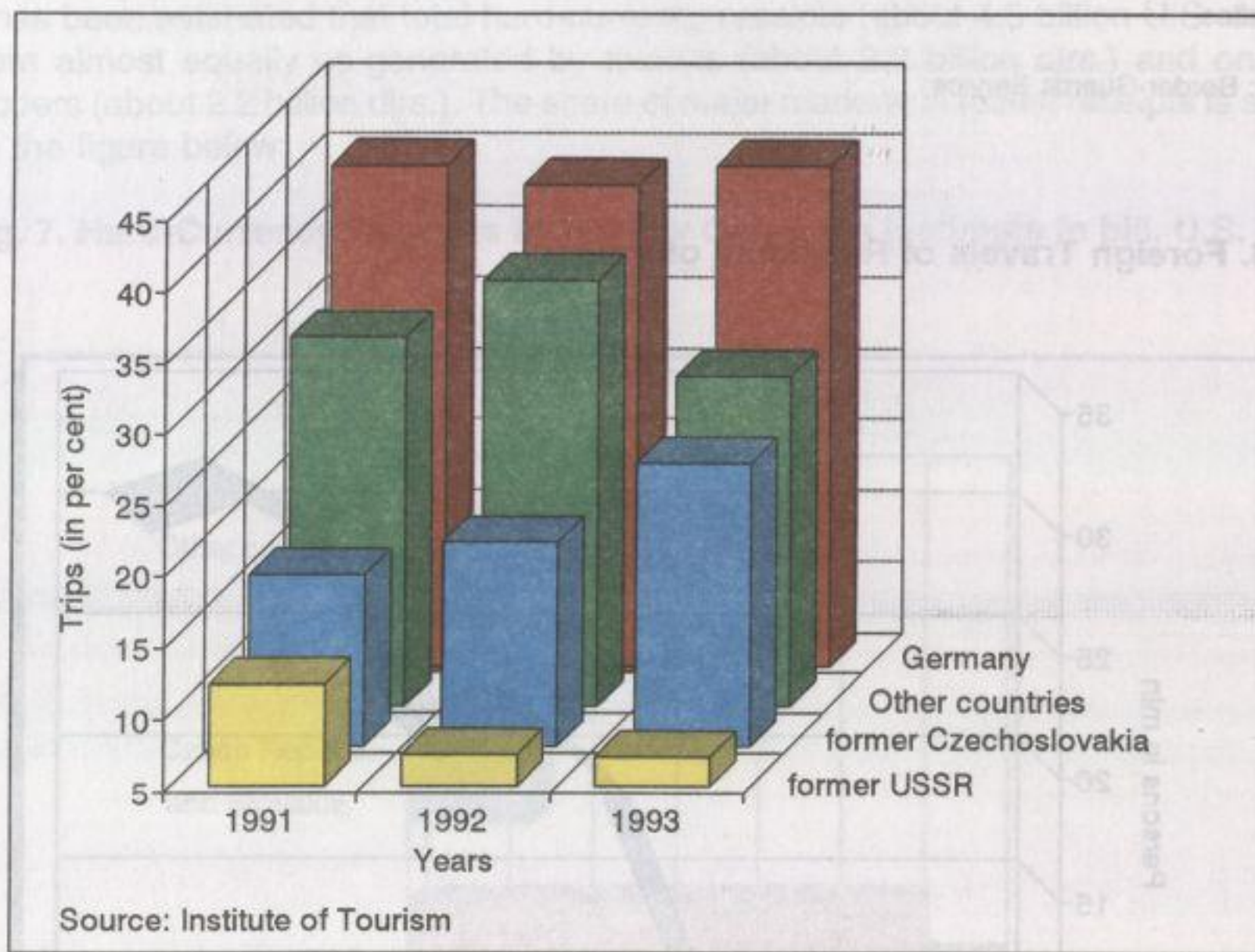


The number of foreign trips taken by residents of Poland in 1993 went up almost 5 times, as compared to 1985, and by 7.3 %, as compared to 1992. It should be stressed that 1992 was marked with an almost 9 million increase in the number of departures as compared to 1991, whereas last year, the respective figure increased by only 2 million over the 1992 statistics.

The number of foreign trips taken by Polish residents shows that the growing tendency is no longer as strong as it was at the beginning of the 1990's.

Poland's neighbouring countries remain to be main travel destinations. Almost 40% of all outbound traffic goes to Germany. At the same time, a considerable drop in trips to post-USSR states has been observed (from 12,1 % in 1991 to 7,0% in 1993).

Fig. 9. Foreign Travels of Residents of Poland by Destinations (in per cent)



Foreign travels were diversified in terms of travel destinations. Trips to France (6.1%) and Austria (4.8%) had a small share in the structure of foreign travel of Polish residents in 1993.

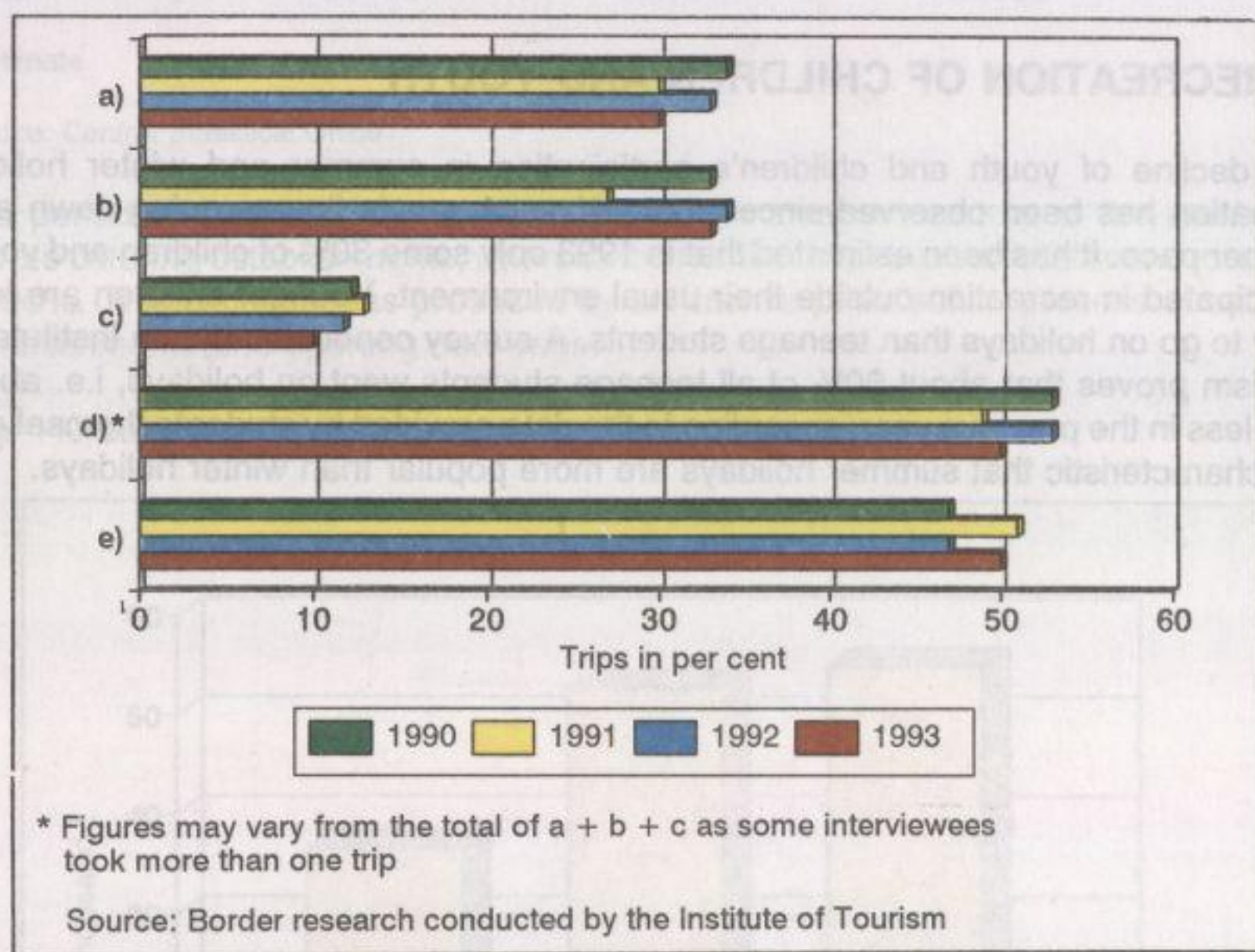
In 1993, recreation and leisure (27%), shopping (22%), and business (19%) were the prevailing travel purposes declared by Poles. Shopping (39%) was the dominant travel purpose in 1992.

C. DOMESTIC TOURISM TRAFFIC OF ADULT POLISH RESIDENTS

Tourist trips of Polish residents presented below include trips with at least one overnight stay outside the usual place of residence, and in case of foreign trips, at least one overnight stay abroad.

International and domestic tourist trips taken by Poles indicate a wave tendency. Tourist activeness of the Polish population fluctuates around 51% and is 12-15% lower than the respective European average.

Fig. 10. Participation of Residents of Poland in Tourism (in %)



- a) Domestic holiday trips (of at least 5 days)
- b) Short domestic trips (not longer than 5 days)
- c) Foreign trips
- d) Altogether - domestic and foreign trips
- e) Did not leave place of residence

Obviously, the real number of trips was bigger than that as some interviewees went on two or more trips during a single year.

According to 1993 estimates, Polish residents took :

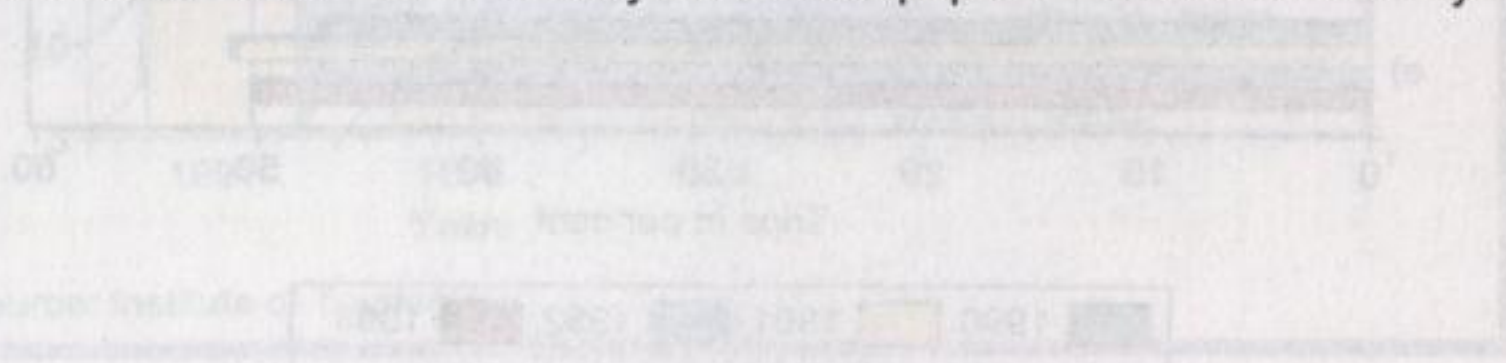
- 15.8 million domestic trips of at least 5 days, and spent 173.8 million man-nights outside their usual environment
- 39.4 mln home trips which did not exceed 4 days, what gives the total of 66 mln men-nights spent outside the usual environment.

The majority of respondents pointed to financial aspects and inability to leave home and family unattended as main obstacles refraining them from tourism participation.

The population is getting poorer, too. In 1990, 35% of the Polish population did not go on holidays due to economic reasons. In 1993, the share of such people rose to 47%.

D. RECREATION OF CHILDREN AND YOUTH

The decline of youth and children's participation in summer and winter holiday recreation has been observed since 1990 with each year's figures going down at a sharper pace. It has been estimated that in 1993 only some 30% of children and youth participated in recreation outside their usual environment. Younger children are less likely to go on holidays than teenage students. A survey conducted by the Institute of Tourism proves that about 60% of all teenage students went on holidays, i.e. about 15% less in the previous year, according to the data provided by students themselves. It is characteristic that summer holidays are more popular than winter holidays.



* Figures may vary from the total of a + b + c as some interviewees took more than one trip

a) Domestic holiday trip (of at least 5 days)

b) Short domestic trip (of at least 2 days)

c) Foreign trip

d) Altogether - domestic and foreign trips

e) Did not leave place of residence

Obviously, the real number of trips was higher than that as some interviewees went

on two or more trips during a single year.

E. TOURIST INFRASTRUCTURE - selected elements

Catering infrastructure

It has been estimated that 55,000 catering establishments operated in 1993. It indicates a 4% increase, as compared to 1992.

Table 8. Number of Catering Establishments, 1991-1993

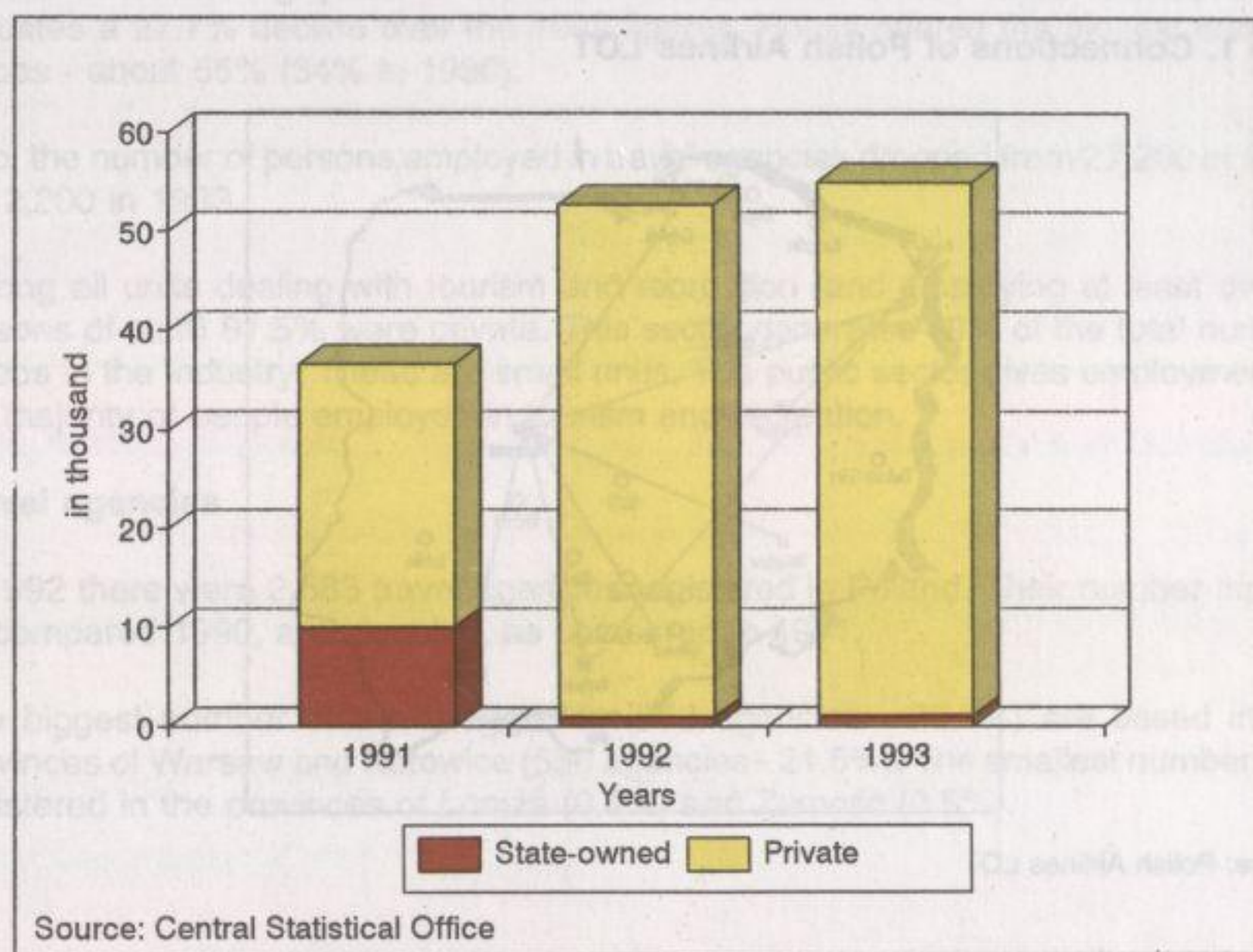
Establishments	1991	1992	1993*
Public	10010	872	1000
Private	26720	51989	54000
Total	36730	52861	55000

* estimate

Source: Central Statistical Office

The period of 1991 and 1993 was marked with a rapid increase of the number of private catering establishments, whereas the number of public establishments dropped by 90%. This situation was produced by an intense privatisation process of catering establishments and opening new ones.

Fig. 11. Catering Establishments by Sectors (in %)



Connections of Polish Airlines LOT

In 1993 Polish Airlines LOT served 32 countries, 43 foreign and 8 domestic destinations.

Table 9. Polish Airlines LOT - Connections

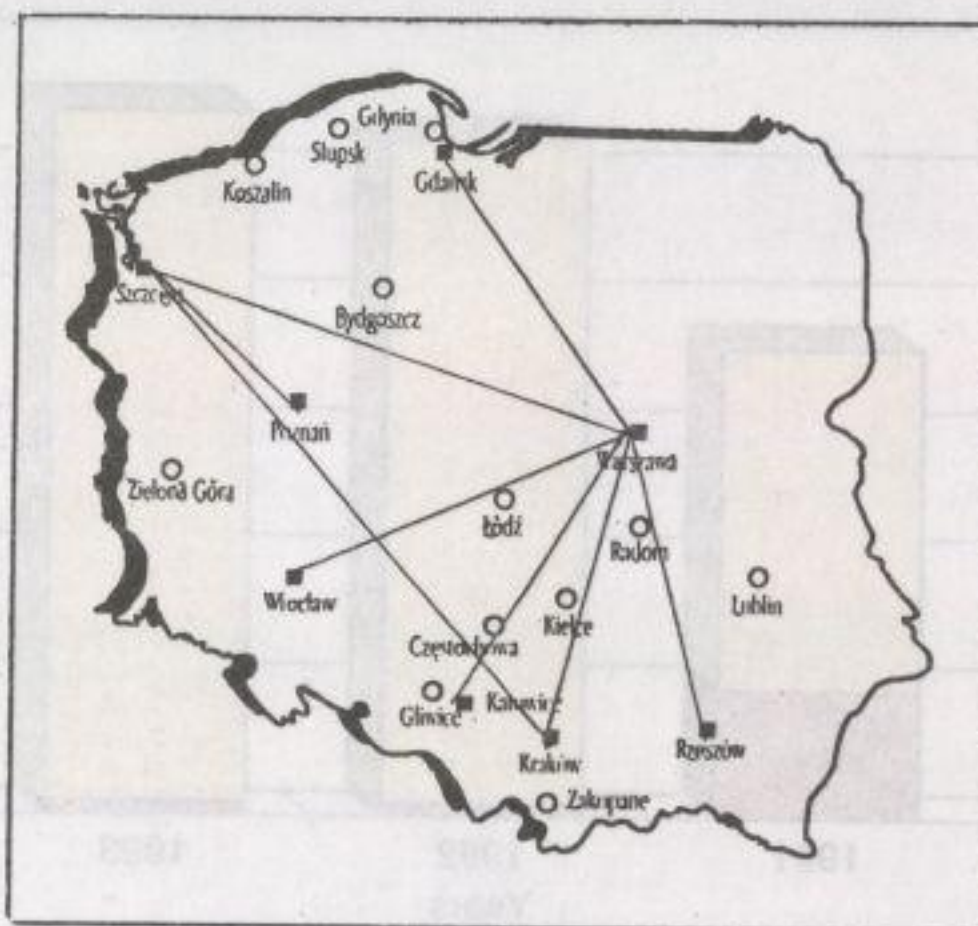
	1992	1993	% of change
Number of served countries	30	32	6.7
Number of foreign destinations	41	43	4.9
Number of domestic destinations	8	8	0
Passengers of Polish Airlines LOT	1254	1346	7.3
Passengers of foreign carriers	819	693	-15.4

Source : LOT data

In 1993, increased activeness of Polish Airlines LOT became clearly visible as the number of passengers using its services rose by 7.3%, and the number of countries to which LOT's fleet flies increased from 30 in 1992 to 32 in 1993, and subsequently, the number of foreign destinations - from 41 to 43. At the same time, the number of passengers served by foreign carriers went down by 15.4%.

The total number of passengers served by Polish airports in 1993 amounted to 2,039 thousand and was 1.6 less than in 1992. It was a result of the LOT-British Airways conflict.

Map 1. Connections of Polish Airlines LOT



Source: Polish Airlines LOT

Map 2. International Connections of Polish Airlines LOT



Source: Polish Airlines LOT

Employment in Tourism and Recreation Industry

Employment in tourism and recreation industry in terms of full-time equivalent, exclusive of catering (data of the Central Statistical Office) totals 37,900 which indicates a 27.7% decline over the 1992 figures. Hotels offered the biggest number of jobs - about 55% (34% in 1990).

Also, the number of persons employed in travel agencies dropped from 27,200 in 1990 to 12,200 in 1993.

Among all units dealing with tourism and recreation (and employing at least over 5 persons of staff) 81.5% were private. This sector generates 39% of the total number of jobs in the industry. These are small units. The public sector gives employment to the majority of people employed in tourism and recreation.

Travel agencies

In 1992 there were 2 583 travel agencies registered in Poland. Their number tripled, as compared 1990, and doubled, as compared to 1991.

The biggest number of travel agencies (673 agencies - 26.1%) are based in the provinces of Warsaw and Katowice (556 agencies - 21.5%). The smallest number was registered in the provinces of Łomża (0.4%) and Zamość (0.5%).

Accommodation Infrastructure in Poland

Table 10. Accommodation Infrastructure in Poland in 1992 and 1993

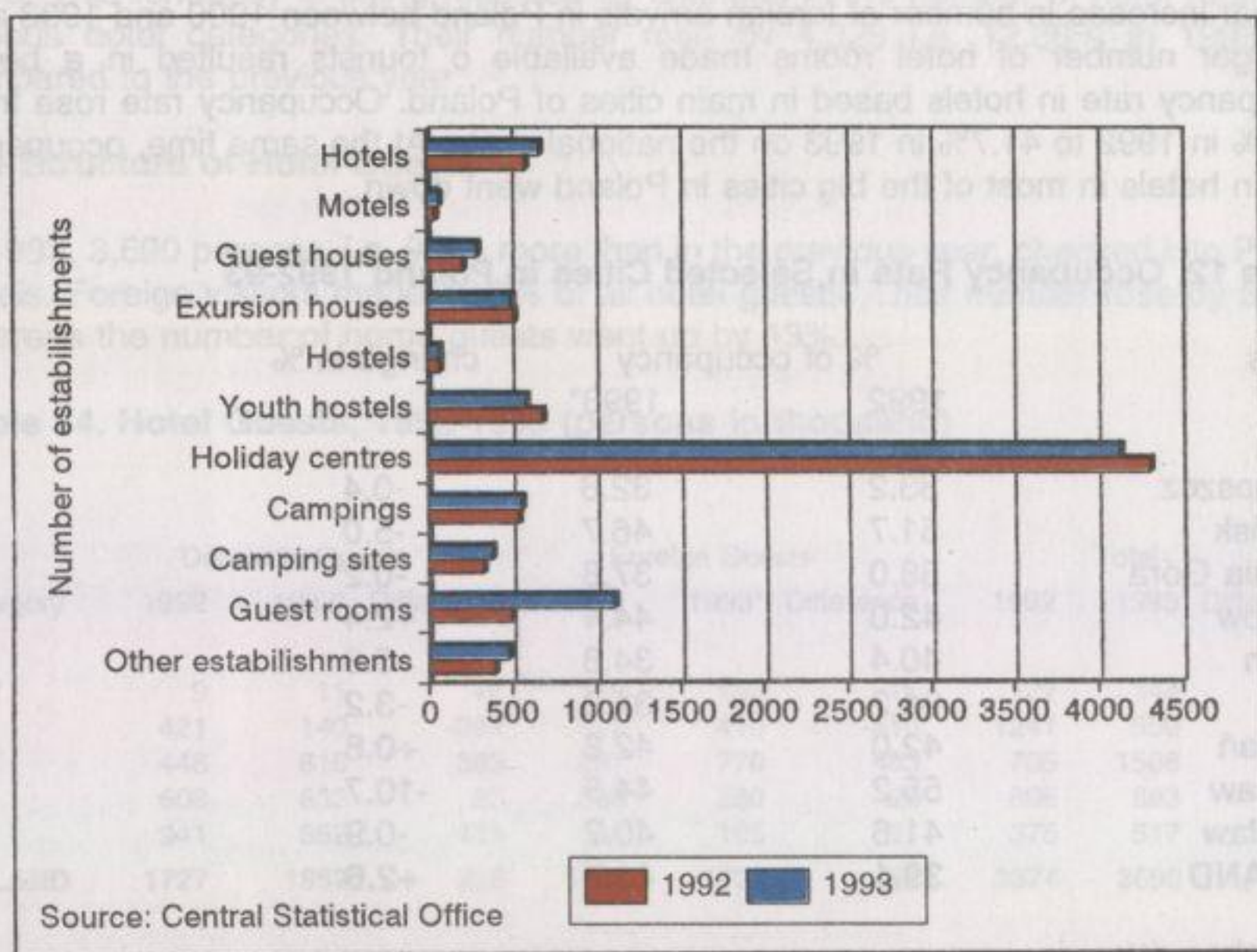
Type of establishment	1992	1993	% changes
Hotels	593	674	+13.8
Motels	48	75	+56.3
Guesthouses	217	30	+40.1
Excursion houses	521	503	-3.5
Hostels	7	74	0
Youth hostels	690	593	-14.1
Holiday-recreation centres	4319	4141	-4.1
Campings	542	557	+2.8
Camping sites	328	388	+18.3
Guestrooms	500	1107	+121.4
Others	400	485	+21.3
Total	8232	8901	+8.1

Source: Central Statistical Office

As 669 new establishments were opened in 1993 their number went up by 8.1%. During the studied period the biggest dynamics was observed with regard to the size of private accommodation which increased up to 121.4%.

The decline in the number of youth hostels (by 14.1%), holiday-recreation centres (by 4.1%) and excursion hotels (by 3.5%) is a highly worrying phenomenon as it impedes the access to cheaper tourist infrastructure popular with young people.

Fig. 12. Accommodation Infrastructure in Poland in 1992 and 1993



International and domestic investments focussed on development of accommodation infrastructure contributed to the increased number of hotels between 1991 and 1993. As 159 new hotels were opened during this period, the total number of hotels in 1993 amounted to 674. This indicates a 13.82% increase, as compared to 1992. At the same time, the number of hotel rooms in the discussed period has increased by 12.36%.

Table 11. Number of Hotels and Hotel Rooms between 1990 and 1993

Years	Number of Hotels	% of increase	Number of Rooms	% of increase
1990	499	.	30674	.
1991	515	3.21	31958	4.19
1992	5931	5.14	35024	9.59
1993*	674	13.66	39352	12.36

Note: as for 1993: * - preliminary data, symbol (.) indicates there is no data available

Source: Central Statistical Office

Occupancy Rate

A clear increase in number of foreign arrivals in Poland between 1990 and 1993 and a larger number of hotel rooms made available to tourists resulted in a better occupancy rate in hotels based in main cities of Poland. Occupancy rate rose from 39.1% in 1992 to 41.7% in 1993 on the national scale. At the same time, occupancy rate in hotels in most of the big cities in Poland went down.

Table 12. Occupancy Rate in Selected Cities in Poland 1992-93

Cities	% of occupancy		change in %
	1992	1993*	
Bydgoszcz	33.2	32.8	-0.4
Gdańsk	51.7	46.7	-5.0
Jelenia Góra	38.0	37.8	-0.2
Cracow	42.0	44.4	+2.4
Lublin	40.4	34.8	-5.6
Łódź	34.2	31.0	-3.2
Poznań	42.0	42.8	+0.8
Warsaw	55.2	44.5	-10.7
Wrocław	41.6	40.7	-0.9
POLAND	39.1	41.7	+2.6

* preliminary data

Source: Central Statistical Office

Hotels by Categories

In 1993 hotel gestors tended to change hotel categories. The class of 3-star hotels shrank by 42 establishments, i.e. 61.8%, whereas the number of 2-star hotels was expanded by 71 new establishments, i.e. by 57.3%.

Table 13. Number of Hotels and Hotel Rooms by Categories

Category	Number of Hotels		Difference	Number of Hotel Rooms		Difference
	1992	1993*		1992	1993*	
*****	2	3	+1	885	1092	+207
****	68	26	-42	12180	5366	-6814
***	124	195	+71	8574	17403	+8829
**	239	233	-6	9009	9737	+728
*	160	217	+57	4376	5734	+1358
Total	593	674	+81	35024	39352	+4328

* preliminary data

Source: Central Statistical Office

It is obvious that the number of 3-star hotels includes all establishments opened in 1993. This tendency is being reflected by changes in the number of hotel rooms in various hotel categories. Their number rose by 4,328 i.e. 12.36% in 1993, as compared to the previous year.

The Structure of Hotel Guests

In 1993, 3,690 persons, i.e. 9.4% more than in the previous year, checked into Polish hotels. Foreign visitors made 48.8% of all hotel guests. Their number rose by 5.5%, whereas the number of home guests went up by 13%.

Table 14. Hotel Guests, 1992-1993 (persons in thousand)

Category	Domestic Guests			Foreign Guests			Total		
	1992	1993*	Difference	1992	1993*	Difference	1992	1993	Difference
*****	9	11	+2	118	133	15	127	144	17
****	421	140	-281	820	410	-410	1241	550	-691
***	448	816	368	287	770	483	735	1586	851
**	608	633	25	288	260	-28	896	893	-3
*	241	352	111	134	165	31	375	517	142
POLAND	1727	1952	225	1647	1738	91	3374	3690	316

* preliminary data

Source: Central Statistical Office

The majority of both domestic and international visitors stayed in medium-standard 3-star hotels. Their share amounted to 43% of the total number of arrivals in hotel establishments.

The number of guests who stayed in 4- and 2-star hotels dropped in 1993 which had already been indicated earlier by the observed trend to change hotel categories.

Basic Definitions According to WTO

- Domestic tourist** - any person residing in a country, who travels to a place within the country, outside his usual environment, for at least one night but not more than six months, and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited.
- International tourist** - any person who travels to a country other than in which he has his usual residence for at least one night but not more than one year and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited.
- One-day tripper** - any person travelling to a country (city) for not more than 24 hours, and who does not stay in a given country (city) overnight, and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited.
- Hotels** - Establishments arranged in rooms, in number exceeding a specified minimum, as coming under a common management and as providing common services including room services, which serve as a basis for grouping them into classes and categories.

Occupancy rate (given in per cent) results from comparison of accommodations provided and the nominal number of places of accommodation.

The nominal number of places of accommodation prepared for tourists or holiday-makers during the whole period of functioning of a given establishment.

Category	Number of Hotels	Difference	Number of Hotel Rooms	Difference
	1992		1993*	
Hotels	855	+1	1092	+207
Hotels	12100	+42	5385	+6814
Hotels	17403	+71	9737	+3829
Hotels	8734	+57	8734	+1358
Hotels	39392	+20	39392	+4328



