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INSTITUTE OF TOURISM

**VISITS MADE BY FOREIGN TOURISTS
TO WARSAW IN 1996**

Written by:
Jerzy Łaciak

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Introductory Comments

In 1993 the Institute of Tourism conducted research into the visits made by foreign tourists to Warsaw¹ at the request of the Warsaw City Office and the State Sport and Tourism Administration. The basic parameters employed for the purposes of the final report, viz. the extent of tourism in Warsaw and the extent of its individual segments were developed on the basis of research that have been conducted for several years by the Institute of Tourism on border crossing points, while the exact composition of foreigners traveling to Warsaw was determined on the basis of research conducted in Warsaw (in two rounds) using a sample of more than 2,000 people.

The analysis for the requirements of this paper as pertains to the visits made by foreign tourists to Warsaw in 1996 was performed exclusively on the basis of the findings of research conducted at border crossings; the benchmark in this case were once again the findings from the research conducted in Warsaw in 1993 and the findings of the research conducted at border crossing points in 1994 and 1995.

The results of both research efforts, i.e. the research conducted at border crossings and in Warsaw may not be compared directly on account of methodological reasons. The changes that have occurred since 1993, whose grounds were the research efforts conducted in Warsaw with the 2,000 foreign tourist sample may be estimated by using the border research from 1996 and comparing it with similar research efforts conducted from 1993 to 1995.

Therefore, not all results may be directly compared, but trends towards change may be indicated as they have been singled out in the tables describing the visits of tourists from individual countries (groups of countries).

Border research was conducted using a different method and a different sample from the research conducted in 1993 in Warsaw; they differ from one another by the battery of responses, the principles used to permit one or more responses to be given to the question posed, the ranges accepted on the features under research, e.g. age.

Nevertheless, attempts have been made to extract those features, which describe the foreign tourist traffic in Warsaw in 1996. In many areas this description, for the reasons listed above, is not sufficiently penetrating, but just as in the case of a similar report on the 1994-1995 period, findings deemed to be credible were incorporated in those instances where discussions of material changes were undertaken.

In 1996 research on selected border crossings was conducted six times: at the turn of March and April, in May, July, September, November and December. A total of 11,157 surveys were taken.

¹ Z. Gerulak-Lubowicz, J. Laciak: *An Analysis of Incoming Foreign Tourist Traffic to Warsaw*, Institute of Tourism, Warsaw 1994.

1. Basic Information about Tourist Traffic in Warsaw

1. The Extent of Foreign Tourist Traffic in Warsaw

Foreign tourists are foreigners, who have spent at least one night in the country visited, where they do not reside longer than one year.

The number of arrivals by foreigners to Poland has been growing regularly. According to the estimates of the Institute of Tourism, the number of tourists is also increasing².

The Institute of Tourism accepted two scenarios for estimating the ratio of one-day visits and tourist visits: an optimistic and a moderate scenario.

According to data from the Central Statistical Office (GUS) in 1996 Poland was visited by 87.4 million foreigners, while the estimates drawn up by the Institute of Tourism the following may be said: according to the optimistic scenario 19.4 million of them were tourists, while 16.3 million of them were tourists according to the moderate scenario. According to the optimistic scenario 5.6 million tourists came to Warsaw in 1996 while the moderate scenario indicates that 4.7 million of them came to Warsaw.

Table 1. Visits made by Foreign Tourists to Warsaw from 1993 to 1996 (in millions)

Countries	Optimistic Scenario				Moderate Scenario			
	1993	1994	1995	1996	1993	1994	1995	1996
Germany	1.3	0.95	1.5	1.5	1.0	0.5	1.0	1.2
Former USSR	2.1	2.85	1.9	2.7	1.6	2.7	1.7	2.2
All Other Countries	1.1	1.6	1.8	1.4	1.1	1.5	1.7	1.3
Total	4.5	5.4	5.2	5.6	3.7	4.7	4.4	4.7

² W. Bartoszewicz, Visits made by Foreign Tourists to Poland in 1996. *Institute of Tourism, Warsaw 1997.*

2. The Composition of Foreign Tourism Traffic in Warsaw

Estimates were elaborated on the grounds of the research conducted on border crossings; these estimates show the general picture of the composition of foreign tourism traffic in Warsaw in 1996 according to fundamental criteria.

a) Intensive Scenario (the Optimistic Scenario)

Table 2 presents the countries and groups of countries whose share in visits to Warsaw in 1996 was the greatest.

Table 2. Trips to Warsaw from 1993 to 1996 by country/group of countries in descending order of frequency (optimistic scenario)

Countries (Groups of Countries)	1993 (000s)	1994 (000s)	1995 (000s)	1996 (000s)
Countries of the former USSR	2100	2850	1900	2700
Germany	1300	950	1500	1500
Scandinavian Countries	220	140	220	110
Benelux Countries	110	130	230	160
France	90	150	100	130
USA	80	140	130	120
United Kingdom	60	130	70	70
Austria	50	180	220	170
Czech Republic and Slovakia	50	230	220	210
Italy	40	*	110	80
Other Countries	400	500	500	350
Total:	4500	5400	5200	5600
From the former USSR:				
Russia	650	1200	500	700
Belarus	550	800	650	800
Lithuania	400	300	350	200
Ukraine	250	250	200	900
Other Countries from the former USSR	250	300	200	100
Total:	2100	2850	1900	2700

*)Impossible to estimate as there were too few Italians in the sample.

Of the total number of 5.6 million foreign tourists the one-day travelers, i.e. those who do not stay overnight in Warsaw accounted for approximately 1,300 thousand people, including 700 thousand people from Germany, 400 thousand people from countries of the former USSR and about 200 thousand people from other countries. Approximately 450 thousand tourists stayed in Warsaw for only one night, of which there were 100 thousand Germans, 250 thousand citizens of the former USSR and about 100 thousand visitors from other countries.

From among the other large cities in Poland besides Warsaw the ones that were the most frequently visited are as follows: Poznań - 1.9 million people, Lublin - 1.8 million people, Białystok - 1.7 million people, Gdańsk - 1.5 million people and Cracow - 1.4 million people.

The people visiting Warsaw most frequently visited the following cities during the same sojourn in Poland: Cracow - 800 thousand, Gdańsk - 500 thousand, Poznań - about 450 thousand and Białystok - approximately 400 thousand.

b) Moderate Scenario

Table three presents the countries and groups of countries whose share in visits to Warsaw in 1996 was the greatest (according to the moderate scenario).

Table 3. Trips to Warsaw from 1993 to 1996 by country (group of countries) in descending order of frequency (moderate scenario)

Countries (Groups of Countries)	1993 (000s)	1994 (000s)	1995 (000s)	1996 (000s)
Countries of the former USSR	1600	2700	1700	2200
Germany	1000	520	1000	1200
Scandinavian Countries	220	140	220	110
Benelux Countries	110	130	230	160
France	90	150	100	130
USA	80	140	130	120
United Kingdom	60	130	70	70
Austria	50	180	220	170
Czech Republic and Slovakia	50	130	120	170
Italy	40	*	110	80
Other Countries	400	500	500	290
Total:	3700	4720	4400	4700
From countries of the former USSR:				
Russia	500	1150	450	600
Belarus	400	750	600	700
Lithuania	300	280	300	150
Ukraine	200	240	175	700
Other Countries from the former ZSRR	200	280	175	50
Total:	1600	2700	1700	2200

**)Impossible to estimate as there were too few Italians in the sample.*

c/ Arrivals of Foreigners to Warsaw by Quarter

Table 4 depicts the arrivals of foreigners to Warsaw in 1996 as a total figure and by the most important segment.

Table 4. Arrivals to Warsaw by Quarter (%)

Quarter	Total Foreigners	Germany	Former USSR	Other Countries
I	14	14	15	11
II	31	29	30	35
III	32	29	37	25
IV	23	28	18	29
Total	100	100	100	100

Just as in 1995 the greatest number of tourists visited Warsaw in the third quarter. This same tendency was observed in the three primary groups of tourists (table 4), although almost the same number of Germans traveled to Warsaw in the fourth quarter.

d/ Trips of Foreigners to Warsaw during the Tourist Season and Off-Season.

Four basic market segments were distinguished in order to review the trips of foreigners to Warsaw in a composite manner during the season (Summer) and off season: German tourists, tourists from other western European countries, travelers from the former USSR and tourists from all other countries.

The Tourist Season.

It is estimated that 82% per annum of all trips to Warsaw are conducted individually, without any involvement of tourist agencies.

During top-season of the 1996 year, individual travel prevailed especially among visitors from countries belonging to the former USSR - 96%. 61% of arrivals from Germany and 78% from other countries of Western Europe were made in this way.

In the Summer of 1996 foreigners primarily arrived by car (nearly 60% over the course of the year, air travel was second with 16%); 68% of all Germans arrived by car, while 57% of the citizens of the former USSR came by this means.

The primary reasons for the trips to Poland among those visiting Warsaw in the Summer time from among German tourists are: business (41%), typical tourism (37%) and visiting relatives and acquaintances (9%). The most substantial reasons for the other countries of Western Europe were business (36%) and typical tourism (27%).

Just as in previous years, business (54%) was the most important reason for the visits from countries of the former USSR. Purely tourism-related motives dominated among tourists from other countries (39%).

The Off-Season

In 1996 during the off-season the greatest number of tourists came from Germany and the former USSR to Warsaw where they organized their trip exclusively on an individual basis: 81% and 76%, respectively. 22% of the travelers from the former USSR arrived in Warsaw in organized groups (26% in 1994; 24% in 1995). 26% of the visitors from other western European countries besides Germany arrived in organized groups, while 68% came entirely on their own.

During the off-season Germans and visitors from the former USSR most frequently made use of a vehicle - 78% and 44%, respectively. Coaches are also of great importance for our neighbors from the East with 57% using this mode of travel. Air travel is the primary mode of transport for the other western European countries (besides Germany) and the other countries - 30% and 53%, respectively; the vehicle is also a primary mode of transport - 52% and 58%, respectively; travelers from Western Europe also use coaches - 21%.

During the off tourist season Germans traveled to Poland (to Warsaw, too) to get to know it (typical tourism) - 35% and for business - 34%; tourists from other western European countries also came to get to know Poland - 36%. Commercial purposes were dominant among travelers from countries of the former USSR: purchases (24%), business (58%).

e/ Characteristic Traits of Arrivals to Warsaw from 1993 to 1996

Table 5. The percentage of foreigners visiting Warsaw, who also visited other large Polish cities (%)

1993	1994	1995	1996
Russia			
Wrocław 5	Białystok 30	Białystok 7	Kraków 19
Szczecin 3	Szczecin 12	Częstochowa 4	Białystok 16
Poznań 3	Lublin 6	Lublin 4	Poznań 7
	Poznań 5	Poznań 3	
Other Countries of the Former USSR			
Białystok 17	Białystok 22	Lublin 13	Białystok 12
Poznań 9	Lublin 9	Poznań 10	Lublin 4
Katowice 9	Poznań 8	Gdańsk 8	Kraków 4
Łódź 8	Gdańsk 5	Kraków 5	Gdańsk 3
Germany			
Kraków 7	Poznań 6	Kraków 10	Poznań 14
Gdańsk 7	Kraków 4	Poznań 8	Gdańsk 13
Poznań 6	Gdańsk 3	Gdańsk 7	Kraków 10
Łódź 5	Wrocław 3	Wrocław 3	Wrocław 6
Scandinavian Countries			
Kraków 44	Kraków 30	Kraków 44	Kraków 19
Gdańsk 44	Szczecin 16	Częstochowa 39	Gdańsk 11
Wrocław 26	Gdańsk 16	Gdańsk 8	Poznań 8
Szczecin 21	Częstochowa 13	Szczecin 3	Wrocław 6
Poznań 11	Poznań 11		Szczecin 5
Benelux Countries			
Kraków 17	Kraków 12	Poznań 61	Kraków 40
Wrocław 16	Poznań 11	Kraków 58	Gdańsk 31
Poznań 15	Białystok 6	Częstochowa 51	Poznań 20
Gdańsk 13	Gdańsk 6	Wrocław 4	Wrocław 3
Łódź 11	Szczecin 5	Gdańsk 3	
France			
Kraków 29	Kraków 56	Kraków 39	Kraków 51
Poznań 27	Częstochowa 50	Gdańsk 27	Gdańsk 48
Gdańsk 22	Poznań 44	Poznań 14	Poznań 45
Szczecin 18		Wrocław 3	Szczecin 7
Częstochowa 17		Częstochowa 3	
United Kingdom			
Kraków 26	Kraków 7	Gdańsk 33	Kraków 13
Częstochowa 13	Gdańsk 6	Kraków 12	Gdańsk 12
Poznań 12	Katowice 3	Poznań 11	Szczecin 8
Katowice 11	Częstochowa 3	Wrocław 5	Częstochowa 8
Gdańsk 8			Poznań 7
Austria			
Poznań 12	Kraków 48	Kraków 64	Kraków 18
Kraków 10	Wrocław 41	Częstochowa 36	Gdańsk 13
Częstochowa 8	Gdańsk 13	Gdańsk 36	Wrocław 12
Gdańsk 5	Poznań 5	Poznań 31	Częstochowa 12
Czech Republic and Slovakia			
Kraków 20	Wrocław 45	Kraków 12	Kraków 30
Gdańsk 13	Kraków 26	Wrocław 11	Wrocław 20
Wrocław 9	Poznań 15	Katowice 9	Katowice 15
Katowice 7		Poznań 4	Poznań 4
Częstochowa 7			Łódź 3

Table 6. Average length of sojourn in Warsaw* (average number of nights)

Country (Group of Countries)	1993	1994	1995	1996
Germany	3.5	4.1	3.2	5.3
Russia	2.8	2.9	4.8	7.7
Other Countries of the Former USSR	2.9	3.0	3.2	4.3
Czech Republic and Slovakia	5.3	4.2	4.1	8.6
Austria	2.8	4.2	4.0	10.5
Benelux Countries	4.4	3.9	2.1	5.9
France	3.5	2.9	3.0	5.7
United Kingdom	4.2	3.0	3.1	4.6
Scandinavian Countries	3.5	2.9	2.6	7.4
Other European Countries	5.2	5.0	4.0	7.5
USA	6.2	7.0	5.4	18.7
All Other Countries	4.1	6.3	2.5	12.1

**) On the basis of the research conducted on border crossings from 1993 to 1996. This applies to tourists who spent at least one night in Warsaw.*

Table 7. Length of sojourn in Warsaw* in 1996 (number of nights)

Country (Group of Countries)	%		
	1-3 nights	4-7 nights	8 and more nights
Germany	48	33	19
Russia	24	40	36
Other Countries of the Former USSR	56	24	20
Czech Republic and Slovakia	8	44	48
Austria	22	28	50
Benelux Countries	25	55	20
France	28	46	26
United Kingdom	46	36	18
Scandinavian Countries	26	39	35
Other European Countries	19	36	45
USA	3	20	77
All Other Countries	8	31	61
Italy	14	24	62

**) On the basis of the research conducted on border crossings from 1993 to 1996. This applies to tourists who spent at least one night in Warsaw.*

Table 8*. The accommodation used (%)

Type of Accommod.	Germany				Russia				Other Countries of the Former USSR				France			
	93	94	95	96	93	94	95	96	93	94	95	96	93	94	95	96
Hotels, motels and similar	44	n.c.	n.c.	—	23	++	++	++	19	+++	+++	++	60	++	++	+
Private quarters, bed & breakfast	12	n.c.	++	n.c.	34	—	—	—	24	n.c.	+	n.c.	5	n.c.	+	n.c.
Camping	6	n.c.	—	—	6	n.c.	—	n.c.	8	n.c.	n.c.	—	7	n.c.	—	—
Apartment of family or friends	30	n.c.	—	—	11	—	—	n.c.	17	—	—	—	21	—	—	—
Other	—	n.c.	n.c.	n.c.	1	++	n.c.	+	8	—	—	++	0	n.c.	n.c.	n.c.
Did not spend the night in Warsaw	8	+	++	+++	25	—	+++	—	24	—	—	—	7	n.c.	+	++

Table 8. Continued.

Type of Accommodation	United Kingdom				Scandinavian Countries				Benelux Countries				USA			
	93	94	95	96	93	94	95	96	93	94	95	96	93	94	95	96
Hotels, motels and similar	48	+++	+++	—	47	+	+++	—	37	+++	+++	++	67	—	—	—
Private quarters, bed & breakfast	11	—	n.c.	n.c.	19	—	—	—	8	n.c.	n.c.	n.c.	8	n.c.	+	+++
Camping	3	n.c.	n.c.	n.c.	2	n.c.	n.c.	n.c.	16	n.c.	—	—	1	n.c.	n.c.	n.c.
Apartment of family or friends	32	—	—	—	15	+	—	—	18	n.c.	—	—	16	—	++	—
Other	0	N.c.	n.c.	N.c.	4	—	—	n.c.	1	n.c.	n.c.	n.c.	—	n.c.	n.c.	n.c.
Did not spend the night in Warsaw	6	—	n.c.	+++	13	n.c.	n.c.	++	20	—	—	+	8	++	++	++

Columns 94, 95 and 96 are a comparison to the data in column 93.

* Symbols in Tables 8-11:

- +++ very large increase (of at least 20 some percent)
- ++ large increase (12-19 percent)
- +
- n. c. no change (possibly a slight change within the limits of statistical error)
- decrease (by several percent, but above the statistical error)
- large decrease (12-19 percent)
- very large decrease (of at least 20 some percent)

Table 9. Organizational Form of Arrival (w %)

Organizational Form	Germany				Russia				Other Countries of the Former USSR				France			
	93	94	95	96	93	94	95	96	93	94	95	96	93	94	95	96
Excursions organized by travel agency	14	+	11	12	32	n.c.	43	21	9	—	19	13	20	+++	44	47
Individually but with the assistance of a travel agency	8	n.c.	10	13	16	—	8	3	15	—	15	1	13	—	13	9
Individually	78	—	79	75	52	++	49	76	75	+++	66	86	67	—	43	44

Table 9 Continued.

Organizational Form	United Kingdom				Scandinavian Countries				Benelux Countries				USA	Czech Republic and Slovakia	Austria	Italy
	93	94	95	96	93	94	95	96	93	94	95	96	96	96	96	96
Excursions organized by travel agency	11	n.c.	33	7	8	—	54	10	10	15	59	39	20	5	26	32
Individually but with the assistance of a travel agency	17	—	18	12	26	—	16	7	11	10	7	10	10	6	1	3
Individually	72	+	49	81	66	+++	30	83	79	75	34	51	70	89	73	65

Table 10. Type of Transport Used* (w %)

Means of Transport	Germany				Russia				Other Countries of the Former USSR				France				United Kingdom		
	93	94	95	96	93	94	95	96	93	94	95	96	93	94	95	96	93	94	96
Airplane	21	+	4	12	3	n.c.	7	14	5	n.c.	4	1	40	—	8	11	54	++	20
Automobile	46	—	89	78	4	+++	39	32	16	+++	67	59	22	—	53	44	21	—	73
Train	18	+	2	3	79	—	12	39	70	—	16	29	16	+	2	1	13	+++	2
Coach	14	+	5	7	10	+++	42	15	3	+++	13	11	17	+++	37	44	6	n.c.	5

Table 10. Continued.

Means of Transportation	Scandinavian Countries				Benelux Countries				USA				Czech Republic and Slovakia		Italy	Austria
	93	94	95*	96*	93	94	95	96	93	94	95	96	95	96	96	96
Airplane	43	n.c.	.	.	23	—	8	23	62	+	89	69	0	4	13	47
Automobile	22	—	.	.	37	n.c.	39	41	5	—	11	15	97	87	67	40
Train	25	+	.	.	23	+	2	3	26	+	0	0	1	4	0	2
Coach	5	—	.	.	10	n.c.	51	33	5	n.c.	0	16	2	5	21	11

*) Lack of credible data to specify the means of transport for Nordic tourists.

Table 11. Socio-demographic data on foreign tourists in Warsaw from 1993 to 1996 (%)

	Germany				Russia				Other Countries of Former USSR				France			
	93	94	95	96	93	94	95	96	93	94	95	96	93	94	95	96
Gender																
Female	39	—	38	36	54	—	39	48	50	—	51	45	49	—	56	36
Male	61	++	62	64	46	++	61	52	50	++	49	55	51	+	44	64
Education																
Primary	1	n.c.	4	5	1	++	10	12	3	—	15	10	3	n.c.	5	5
Secondary	33	—	49	52	52	+++	67	36	54	—	61	52	36	+	49	55
Post-secondary	66	+	47	43	47	—	23	52	43	++	24	38	61	+	46	40
Employment																
- Presently employed	71	+	85	88	57	+++	75	87	68	—	84	92	61	n.c.	81	90
Studying	19	n.c.	5	6	10	—	4	5	14	+	6	3	31	++	6	7
Polish heritage	13	n.c.	13	9	8	n.c.	6	4	17	—	14	6	18	++	8	10

Table 11. Continued.

	United Kingdom				Scandinavian Countries				Benelux Countries				USA				Czech Republic and Slovakia		Italy	Austria
	93	94	95	96	93	94	95	96	93	94	95	96	93	94	95	96	95	96	96	96
Gender																				
Female	46	—	45	35	49	—	54	35	44	n.c.	57	42	38	++	38	39	43	50	46	38
Male	54	+	55	65	51	++	46	65	56	n.c.	43	58	62	—	62	61	57	50	54	62
Education																				
Primary	3	—	3	2	1	—	22	2	2	n.c.	4	8	0	n.c.	11	4	1	1	0	1
Secondary	23	—	46	43	29	—	56	40	29	—	51	49	14	n.c.	57	35	17	31	39	31
Post-secondary	74	+++	51	55	70	++	22	58	69	++	45	43	86	+	31	61	82	68	61	68
Employment																				
— Presently employed	67	++	87	85	60	++	75	90	55	++	88	82	66	+	84	81	95	96	97	77
Studying	21	n.c.	4	10	29	—	5	6	31	—	5	12	24	n.c.	8	21	2	4	2	7
Polish heritage	19	n.c.	5	1	9	—	8	9	9	n.c.	3	9	19	n.c.	53	32	1	1	4	12

Table 12. Age of tourists in Warsaw from 1993 to 1996* (%)

Age (in years)	Germany				Russia				Other Countries of Former USSR				France				United Kingdom			
	93	94	95	96	93	94	95	96	93	94	95	96	93	94	95	96	93	94	95	96
Up to 24	5	5	6	11	12	6	4	4	16	7	5	2	8	6	9	12	13	6	6	15
25-34	32	30	29	32	35	38	18	21	35	33	29	14	34	29	16	37	15	14	19	27
35-44	32	37	37	36	28	35	51	54	34	45	48	46	34	32	39	31	48	61	30	40
45-54	18	19	22	15	12	15	21	20	6	13	11	31	20	23	24	14	15	15	32	15
55-64	5	7	6	4	2	3	5	1	3	2	2	4	3	10	11	4	7	4	10	2
65 +	1	1	—	1	—	1	1	—	—	—	—	—	—	—	1	2	2	—	2	1
No data	7	1	—	1	11	2	—	—	6	—	5	3	1	—	—	—	—	—	1	—

Table 12. Continued.

Age (in years)	Scandinavian Countries				Benelux Countries				USA				Czech Republic and Slovakia		Italy	Austria
	93	94	95	96	93	94	95	96	93	94	95	96	95	96	96	96
Up to 24	6	2	3	6	4	4	7	13	7	9	5	8	3	4	6	7
25-34	15	18	21	22	23	13	27	18	21	16	23	23	19	22	22	10
35-44	41	39	28	49	42	18	38	42	30	55	42	48	41	47	51	41
45-54	19	24	17	20	24	51	26	13	22	17	22	18	31	25	17	25
55-64	11	6	18	3	7	9	2	7	17	3	7	2	5	2	3	10
65 +	5	3	11	—	—	5	—	5	3	—	1	—	1	—	—	7
No data	3	8	2	—	—	—	—	2	—	—	—	1	—	—	1	—

*) Tables 12 - 21 based exclusively on the research conducted on border crossings from 1993 to 1995.

Table 13. Purpose of the Trips to Poland among Warsaw Visitors in 1996 (%)

Purpose	Germany	Russia	Other Former USSR Countries	France	United Kingdom	Nordic Countries	Benelux Countries	USA	Czech Republic and Slovakia	Austria	Italy
Typical Tourism	41	33	19	62	36	51	55	38	64	44	63
Visit relatives and friends	14	12	9	12	18	33	22	24	50	29	30
Business	42	59	53	26	50	41	26	45	47	49	36
Short Assignment	1	1	3	2	1	0	0	0	1	0	1
Shopping	8	37	45	1	1	4	2	0	22	1	3
Religious Motives	4	5	1	1	4	1	1	7	0	1	1
Visiting places of origin	5	1	1	3	2	2	8	24	1	2	2
Transit	2	10	6	4	5	1	1	0	1	4	1
Others	2	8	6	1	3	1	1	2	0	2	0

Table 14. Subject of Criticism related to Sojourn in Poland (%)
— GERMANY

Subject of Criticism	1993		1994		1995		1996	
	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland
High costs of stay	9	7	8	5	7	6	25	22
Long road (difficult, burdensome)	16	14	11	12	11	12	15	15
Difficulties to organize excursion	4	3	5	5	7	8	5	5
Poland's limited tourism attractiveness	6	5	5	5	4	3	5	4
Insufficient information about opportunities and conditions of stay	16	12	9	8	4	3	7	7
Low standard of service offered (hotels, restaurants, transport)	29	21	18	13	9	7	11	8
Sanitary conditions	34	35	28	20	13	11	22	18
Others	3	2	2	1	2	1	1	1

Table 15. Subject of Criticism related to Sojourn in Poland (%)
— RUSSIA

Subject of Criticism	1993		1994		1995		1996	
	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland
High costs of stay	46	49	59	57	43	44	40	27
Long road (difficult, burdensome)	9	10	1	3	5	5	10	8
Difficulties to organize excursion	25	20	34	30	17	13	6	5
Poland's limited tourism attractiveness	2	2	17	13	16	9	2	1
Insufficient information about opportunities and conditions of stay	19	16	5	6	8	6	5	3
Low standard of service offered (hotels, restaurants, transport)	16	13	5	7	4	3	4	2
Sanitary conditions	12	13	7	10	6	9	3	3
Others	15	13	4	4	1	8	3	4

Table 16. Subject of Criticism related to Sojourn in Poland (%)
— OTHER COUNTRIES OF THE FORMER USSR

Subject of Criticism	1993		1994		1995		1996	
	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland
High costs of stay	53	58	56	47	40	41	33	27
Long road (difficult, burdensome)	11	11	3	4	7	6	12	8
Difficulties to organize excursion	22	20	24	21	20	14	3	5
Poland's limited tourism attractiveness	3	3	16	13	4	7	1	1
Insufficient information about opportunities and conditions of stay	10	9	6	8	5	6	5	3
Low standard of service offered (hotels, restaurants, transport)	12	10	6	7	4	4	3	3
Sanitary conditions	10	8	14	14	17	9	3	3
Others	13	11	4	6	8	7	3	4

Table 17. Subject of Criticism related to Sojourn in Poland (%)
— FRANCE

Subject of Criticism	1993		1994		1995		1996	
	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland
High costs of stay	18	10	1	2	3	6	21	27
Long road (difficult, burdensome)	18	10	2	38	3	8	14	16
Difficulties to organize excursion	6	4	14	9	4	4	5	6
Poland's limited tourism attractiveness	9	7	3	2	1	2	5	5
Insufficient information about opportunities and conditions of stay	18	15	8	5	4	3	9	9
Low standard of service offered (hotels, restaurants, transport)	11	11	10	7	5	9	10	9
Sanitary conditions	34	27	10	6	14	14	14	15
Others	6	5	2	2	-	1	1	1

Table 18. Subject of Criticism related to Sojourn in Poland (%)
— UNITED KINGDOM

Subject of Criticism	1993		1994		1995		1996	
	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland
High costs of stay	6	6	6	4	5	6	34	28
Long road (difficult, burdensome)	24	25	2	23	7	11	9	10
Difficulties to organize excursion	4	3	1	1	1	4	6	6
Poland's limited tourism attractiveness	5	8	1	1	3	6	4	3
Insufficient information about opportunities and conditions of stay	2	6	5	5	8	5	11	8
Low standard of service offered (hotels, restaurants, transport)	33	26	5	6	8	8	10	7
Sanitary conditions	34	27	9	7	5	7	17	13
Others	9	8	5	4	-	-	-	1

Table 19. Subject of Criticism related to Sojourn in Poland (%)
— SCANDINAVIAN COUNTRIES

Subject of Criticism	1993		1994		1995		1996	
	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland
High costs of stay	9	8	21	15	4	4	35	24
Long road (difficult, burdensome)	21	19	17	18	40	27	10	12
Difficulties to organize excursion	7	8	2	2	3	5	4	5
Poland's limited tourism attractiveness	5	7	5	2	-	1	7	7
Insufficient information about opportunities and conditions of stay	12	10	8	8	4	3	14	12
Low standard of service offered (hotels, restaurants, transport)	16	16	18	10	10	10	17	19
Sanitary conditions	28	34	17	17	7	11	16	18
Others	11	7	2	3	-	-	-	-

Table 20. Subject of Criticism related to Sojourn in Poland (%)
— BENELUX COUNTRIES

Subject of Criticism	1993		1994		1995		1996	
	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland
High costs of stay	22	16	29	15	34	9	20	20
Long road (difficult, burdensome)	19	19	2	12	12	11	12	14
Difficulties to organize excursion	4	7	7	2	6	5	5	8
Poland's limited tourism attractiveness	8	8	0	1	3	7	2	4
Insufficient information about opportunities and conditions of stay	10	12	5	11	7	8	11	7
Low standard of service offered (hotels, restaurants, transport)	21	15	12	8	7	7	11	10
Sanitary conditions	35	25	13	13	6	10	17	20
Others	6	4	3	7	1	-	-	-

Table 21. Subject of Criticism related to Sojourn in Poland (%)
— USA

Subject of Criticism	1993		1994		1995		1996	
	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland	Tourists visiting Warsaw	Tourists visiting Poland
High costs of stay	14	15	10	9	5	3	53	43
Long road (difficult, burdensome)	18	13	6	8	9	8	4	12
Difficulties to organize excursion	10	8	4	4	10	7	13	11
Poland's limited tourism attractiveness	8	5	0	0	6	6	2	4
Insufficient information about opportunities and conditions of stay	18	10	3	4	6	6	39	27
Low standard of service offered (hotels, restaurants, transport)	31	18	5	4	7	5	26	29
Sanitary conditions	12	11	6	6	7	8	21	21
Others	12	12	4	8	-	-	-	-

II. Description of the Arrivals from Selected Countries / Groups of Countries

Arrivals from Germany

- Compared to previous year (1995), in 1996 there was a growth in the average length of stay (5.3 nights).
- The hospitality of friends and relatives was used to an equal degree, more people came for one day (without an overnight stay), and fewer people use hotels.
- There were no material changes in terms of organizational forms — 3/4 of the arrivals were organized completely individually.
- The role of the airplane as a means of transport increased; the automobile's role slightly declined in importance.
- A percentage increase in the number of arrivals for tourism was noted (more than 40% in 1996) and a decline in visits to family and friends (15%). In comparison to previous year there was growth in business arrivals (nearly 50% in 1994, 30% in 1995, more than 40% in 1996).
- Slightly fewer German citizens with Polish heritage came to Poland.

Arrivals from Russia

- Compared to the previous year there was a growth in the average length of stay — 7.7 nights (primarily in the 4-7 day range— 40%).
- Slightly fewer use hotels than in 1995 year.
- The percentage of totally individual arrivals increased decisively (up to 76%), the percentage of arrivals in organized groups decreased (to 21%).
- The greatest difference from previous year is the number of people traveling by train (nearly 40%) and the decrease in the percentage held by coaches as the means of transport.
- Business travel is dominant (recently for commercial purposes) — nearly 60%. Nearly 40% declare that they travel to do shopping. Every third visitor (in the research several purposes may be indicated) comes for tourism, 1-2% to go to work.
- The percentage of people traveling from Russia and declaring Polish heritage has remained at the same level (4%).

Arrivals from Other Countries of the Former USSR (Besides Russia)

- From 1993 to 1996 we have observed systematic growth in the average length of stay (4.3 nights in 1996).

- The level of hotel usage has remained at the same level, fewer people decline to stay overnight in Warsaw.
- In comparison with previous year there has been an increase in the number of individual arrivals and a decrease in group travel.
- Despite a decline automobile arrivals are dominant (59%), the percentage of train arrivals has increased (29%).
- The primary reasons for coming are business (53%) and shopping (45%), followed by typical tourism (19%).
- We have been observing a clear falling off on the number of arrivals among people with Polish heritage.

Arrivals from France

- The average length of stay has increased decisively (3.0 nights in 1995; 5.7 nights in 1996).
- The number of people using hotels has declined, the number of visitors to Warsaw who are not spending the night here is on the rise.
- In comparison to previous year no material changes in the organizational forms for getting here have been observed: 47% came under group excursions, 44% came completely on their own.
- The role of the automobile as a means of transportation has fallen off slightly, the coach has gained somewhat in significance.
- Tourism was dominant among the reasons for traveling to Poland just as in 1995 (62%), followed by business (26%) and visits to family and friends (12%).
- Every tenth tourist from France declares Polish heritage.

Arrivals from the United Kingdom

- Compared to previous year there was a growth in the average length of stay (4.6 nights).
- There has been a decisive decline in the people using hotels, motels and bed & breakfasts; the percentage of Warsaw visitors who do not spend the night is on the rise.
- There has been a huge increase in the number of trips organized completely individually (from 49% in 1995 to 81% in 1996) and a decline in group arrivals.
- Nearly 3/4 of these arrivals are effected by passenger vehicle, 1/5 — by airplane.
- In contrast to 1995 and similarly to 1994, business trips dominated in 1996 (every second visit); followed by the next most frequent reason, viz. typical tourist motives (36%) and to visit friends and relatives (18%).
- Only every hundredth person traveling from the United Kingdom declares Polish heritage (every 20th person in 1995).

Arrivals from the Nordic Countries

- Compared to previous year there was substantial growth in the average length of stay — 7.4 nights (primarily in the 4-7 day range — 39%).
- Percentage of people using hotels on the decline, the percentage of people using the apartments of family (friends) increased as they did not stay overnight before.
- There has been a sudden growth in comparison with 1995 (to the level from 1993 and 1994) in arrivals organized completely on their own; every tenth tourist from Scandinavia comes to Poland from a travel agency.
- The role of tourism has increased (51%) and business (41%); family and social reasons also have a significant percentage (33%).
- Arrivals of people with Polish heritage stay at the same level (9%).

Arrivals from the Benelux Countries

- Compared to 1995 there was growth in the average length of stay (5.8 nights).
- The percentage of people using hotels has declined slightly, the percentage of people staying in Warsaw has increased.
- The percentage of individual arrivals has increased (51%), the percentage of group arrivals has decreased (39%).
- More people arriving by airplane (23%), fewer by coach (33%).
- Tourist reasons dominant among arrivals (55%), business constitutes 26%, family visits—22%.
- Every tenth tourist from Benelux countries has declared Polish heritage (3% in 1995).

Arrivals from the USA

- In comparison to 1995 the average length of stay increased substantially— to 18.7 nights (5.4 in 1995); 3/4 of these visitors stay at least 8 days.
- The percentage of people using hotels increased, the percentage staying with family and friends decreased.
- Just as previous year, individual arrivals are dominant - 70%.
- 69% arrive in Warsaw by airplane, the greatest percentage is held by business visits (45%), tourist visits (38%) and to visit family and country of origin (24% each).
- Every third tourist from the USA is of Polish descent (every second tourist in 1995).