

# Poland

## Tourism in the economy

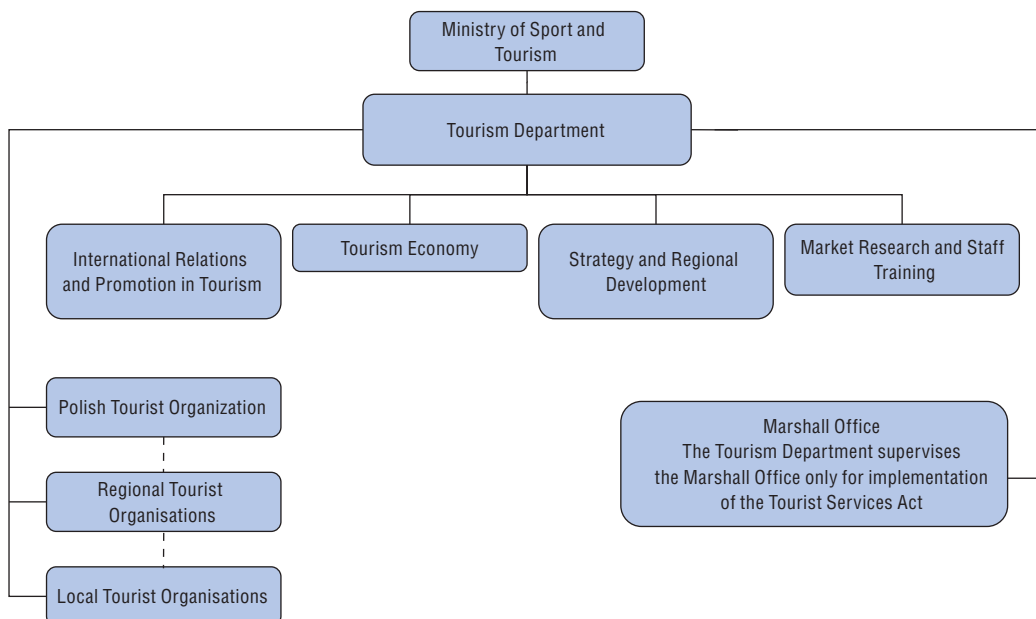
The share of tourism in GDP in 2008 was 6%. The expenditure of foreigners in Poland in 2008 was estimated at PLN 28.1 billion, while that of Polish residents in Poland was estimated at PLN 23.9 billion. The expenditure of Polish residents abroad was PLN 22.5 billion. The total value of the tourism economy was estimated at PLN 76.1 billion. In 2008 tourism exports were PLN 23.5 billion, 4.7% of total Polish exports.

## Tourism organisation

Tourism is managed as an independent section of the government and deals mainly with tourism infrastructure development, the mechanisms of market regulation and the recognition of the qualifications of regulated professions (such as tourist guides). Since 2007, tourism has come within the scope of the Ministry of Sport and Tourism. Tourism-related issues are dealt with by the Tourism Department within the Ministry (Figure 4.23).

The promotion of tourism in Poland is conducted at the central level by the Polish Tourist Organisation (PTO), at the regional level by Regional Tourist Organisations (RTOs), and at the local level by Local Tourist Organisations (LTOs).

Figure 4.23. **Poland: Organisational chart of tourism bodies**



Source: OECD, adapted from Ministry of Sport and Tourism, 2009.

At the local level, the *voivod* (a Palatine) is the representative of government in *voivodships* (Palatinate regions), and is responsible for the implementation of government policy, adjusting detailed policy objectives to local conditions and overseeing the implementation of policy. The primary role in tourism development is played by local government (commune, district, marshals), at two levels: i) all public affairs of a local or regional level which are not reserved by law for other entities (known as “own tasks”); and ii) the execution of tasks prescribed in the framework of general government administration (“commissioned tasks”). In this second group, the communes and marshals are responsible for implementing the 1997 Act governing tourism services.

## Tourism budget

In 2008 the budget of the National Tourism Administration was PLN 5.447 million, and for the National Tourism Organisation it was PLN 40.0 million

In addition, structural funds covering the period 2007-13 are available in part for special projects in the tourism sector, such as infrastructure development and the enhancement of tourism services. The national *Innovative Economy Operational Programme – Priority 6 Polish economy on the international market* has as its objective the enhancement of the brand of Poland through the promotion of the country as an attractive destination for both tourists and investors, and as a good place to establish businesses.

Projects connected with tourism can also be supported by the *Eastern Poland Development Operational Programme* to be implemented in 5 regions: Lubelski, Podkarpacki, Podlaski, Swietokrzyski and Warmińsko-mazurski. Financial support will be provided for joint promotional campaigns of these 5 regions aimed at attracting tourists and investors. Sustainable tourism development is a special category and will be used to develop bicycle routes and for projects to construct and modernise fair and convention/conference infrastructure.

Tourism will be also supported by the *Operational Programme for European Territorial Co-operation, especially in the Poland-Czech Republic and Poland-Slovak Republic*. Tourism will also benefit from funds promoting co-operation with Baltic countries’ and between Poland and German regions (Länder).

The *Infrastructure and Environment Operational Programme* focuses on maintaining and improving cultural sites and monuments and will also favour the further development of tourism.

Tourism projects are strongly supported in all 16 Regional Operational Programmes that provide support for the construction and modernisation of tourism infrastructure, e.g. tourism accommodation establishments, and recreational, spa, tourist information and public tourism infrastructure (tourism trails) as well as tourism promotion.

## Tourism-related policies and programmes

Some amendments were made in 2008 to the 1997 Act on Tourism Services, simplifying and updating a number of procedures.

Regarding tourism statistics, according to the Institute of Tourism data there were 60 million arrivals in 2008, 9% down on 2007 or which some 13 million will be overnight visitors. A decrease is foreseen for visitors from Belarus, the Russian Federation, Ukraine (of 30% on 2007 levels), and from the EU (down 2%). Increases are predicted from the Czech Republic and the Slovak Republic (by 9% and 21% respectively). The Institute of Tourism

estimated that there were 50.2 million departures abroad in 2008, 5.6% more than in 2007. In 2008, domestic travel was at the same level as in 2007, that is 34.9 million domestic travels.

A key document in Poland is the *Directions for Tourism Development until 2015* (Box 4.30). This deals with three areas – competitiveness issues, sustainable tourism and human resources.

Under competitiveness issues, measures are recommended for:

- creating innovative and competitive products meeting the requirements of sustainable development;
- stimulating co-operation between numerous entities, including at the inter-regional level, for integrating the tourism product;
- supporting the types of tourism with the highest chances of success in the light of market conditions and their own assets; and
- implementing and promoting modern solutions in support of tourism industry quality.

**Box 4.30. Key priorities of “Directions for Tourism Development until 2015”**

- **Highly competitive tourism product:** creation and development of competitive tourist products; development of tourism infrastructure; supporting tourist entrepreneurship and organisations; development of different types of tourism.
- **Development of human resources contributing to tourism development:** developing education in the field of tourism; supporting social tourism; training professional tourism staff.
- **Marketing support:** improving the tourism information and reservation system; improving marketing.
- **Shaping tourism space:** complying with accessibility and sustainability requirements during tourism planning.

Implied in the implementation of these tasks is the constant monitoring of the needs of tourists, market trends, the country’s competitive position and the need to adjust the tourism product to reflect changing market conditions.

Under sustainable tourism development, the document recommends measures for sustainable regional development, focusing on environmental protection, increasing absorptive capacities by means of renovating, rebuilding and developing relevant infrastructure, and increasing the communications available to tourism regions.

Dealing with human resources, the document recognises the importance of constant staff to meet the needs of tourism development and to ensure an appropriate quality of service. To achieve this, measures are recommended to:

- raise the qualifications of management and operational personnel;
- introduce a professional qualifications system; and
- educate social personnel.

In addition to preparing staff for servicing tourist traffic, another equally important issue is to educate the recipients of tourist services more widely in order to increase their

interest in spending their free time actively and using cultural and environmental resources in a conscientious and responsible way.

As in previous years, the Minister for Tourism co-operated with social organisations (non-governmental organisations or NGOs) such as foundations, associations and other organisations engaged in tourism activity. This typically takes the following forms:

- meetings with representatives of these organisations to establish joint efforts for the development of the tourism economy;
- co-financing tourism development; and
- consultations on draft legal regulations and strategy documents.

In developing a monitoring and evaluation system for the tourism sector, indicators such as the share of tourism in GDP, inbound and outbound tourism and foreign expenditure in Poland are monitored. There is also an Inter-ministerial Committee for co-ordinating the tasks of the government related to tourism development.

### **Directions for tourism development until 2015**


New challenges for tourism policy and programmes include addressing the issues of tourism and transportation, tourism and the environment, tourism and migration, tourism and climate change, and international and intra-regional activities. On the statistical front, work is based on Tourism Satellite Accounts and there are new analytical tools and new data sets under development.

## Statistical profile

**Table 4.131. Poland: Domestic overnight tourism**

	Units	2004	2005	2006	2007	2008
Number of overnight stays	Thousands	11 812	12 287	13 199	14 560	15 477
Number of nights spent	Thousands	37 344	38 076	40 680	44 036	46 387


Source: Ministry of Sport and Tourism, Tourism Department, 2009.

StatLink  <http://dx.doi.org/10.1787/770361022547>

**Table 4.132. Poland: Inbound tourism – International arrivals and receipts**

	Units	2004	2005	2006	2007	2008
Total international arrivals	Thousands	61 918	64 606	65 115	66 208	59 935
Number of same-day visitors in hotels and similar establishments	Thousands	47 628	49 406	49 445	51 233	46 975
International travel receipts	Million PLN	21 032	20 342	22 409	29 081	28 075

Source: Ministry of Sport and Tourism, Tourism Department, 2009.

StatLink  <http://dx.doi.org/10.1787/770402120525>

**Table 4.133. Poland: Outbound tourism – International departures and expenditure**

	Units	2004	2005	2006	2007	2008
Number of tourism trips	Thousands	6 300	6 200	7 300	6 900	7 600
International travel expenditure	Million PLN	17 397	18 043	22 403	21 393	22 487

Source: Ministry of Sport and Tourism, Tourism Department, 2009.

StatLink  <http://dx.doi.org/10.1787/770421575672>

Table 4.134. **Poland: Enterprises in tourism**

	Units	2004	2005	2006	2007	2008
All collective accommodation	Establishments	6 972	6 723	6 694	6 718	6 857
Hotels and similar	Establishments	2 139	2 200	2 301	2 443	2 642
Restaurants and catering in accommodation	Establishments	7 045	6 873	6 876	7 196	7 548
Restaurants and catering	Establishments	..	11 872	12 223	12 308	13 947
Tour operators, travel agencies	Establishments	2 839	2 627	2 689	2 839	2 920

Source: Ministry of Sport and Tourism, Tourism Department, 2009.

StatLink  <http://dx.doi.org/10.1787/770448520534>

Table 4.135. **Poland: Employment in tourism**

	Units	2004	2005	2006	2007
Tour operators, travel agencies	Employees	..	..	..	95 395
Hotels, restaurants	Employees	217 738	220 967	230 375	241 764
Hotels, restaurants (in full-time equivalents)	Employees	141 635	147 328	152 560	163 330

Source: Ministry of Sport and Tourism, Tourism Department, 2009.

StatLink  <http://dx.doi.org/10.1787/770515357875>

Table 4.136. **Poland: Tourism in the national economy – Tourism Satellite Account**  
2005

	Units	Domestic tourism consumption	Inbound tourism consumption	Tourism GDP
Accommodation services	Million PLN	2 199	3 507	3 111
Food and beverage serving services	Million PLN	2 200	2 935	1 729
Passenger transport services	Million PLN	1 297	1 746	2 029
Travel agency, tour operator and tourist guide services	Million PLN	853	442	1 650
Cultural services <sup>1</sup>	Million PLN	437	1 383	700
Other services	Million PLN	263	2 875	8 644
Goods	Million PLN	3 808	6 388	..
Total	Million PLN	11 057	19 276	17 863

1. Includes cultural and recreational services.

Source: Ministry of Sport and Tourism, Tourism Department, 2009.

StatLink  <http://dx.doi.org/10.1787/770582256188>

Table 4.137. **Poland: Other economic indicators**

	Units	2005
Tourism share of GDP	Percentage	2.06

Source: Ministry of Sport and Tourism, Tourism Department, 2009.

StatLink  <http://dx.doi.org/10.1787/770586575264>



**From:**  
**OECD Tourism Trends and Policies 2010**

**Access the complete publication at:**  
<https://doi.org/10.1787/tour-2010-en>

**Please cite this chapter as:**

OECD (2010), "Poland", in *OECD Tourism Trends and Policies 2010*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2010-28-en>

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