

TOURISM IN WARSAW

REPORT 2018

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Warsaw's pulse beats to the rhythm of its residents: not only in the city centre but in all 18 districts of the capital. Each one is a mosaic of colourful vibes, authentic stories and unique tastes. Within these districts we are witnessing a revitalisation of post-industrial spaces, the development of new estates and attractions as well as the creation of business and recreation zones.

The former industrial districts of Wola and Powiśle are undergoing change; the former "Koneser" vodka distillery in Praga district has transformed into a modern space where all types of outdoor events take place and are open to all. Warsaw's residents more often spend time outside the city centre and value the variety and atmosphere of all Warsaw's districts, and in so doing, inspire those visiting the capital to **discover places off the beaten track**.

A popular meeting place is beside the River Vistula: one can relax here along the modern boulevards and well-kept beaches, do sport or explore the "wild" bank, which is a part of the protected "Natura 2000" network. It is easy to relax outdoors in any of Warsaw's dozens of green squares, parks and gardens which regularly host a variety of events including the popular breakfast markets and 'eco bazaars', in line with the worldwide trend in health and an ecological lifestyle.

With every year the capital is becoming increasingly popular with visitors. They can take in historical palaces and modern museums, see a variety of architectural styles and enjoy concerts of world-famous stars or premier sporting events.

This year's "Tourism in Warsaw" report demonstrates that tourists view the capital as an interesting city, full of monuments and its residents as extraordinarily friendly. Tourists happily visit Warsaw again and again, especially because of the fact that new and interesting places are constantly materialising.

Estimated number of arrivals of tourists and same-day visitors

10,410,000

Arrivals of tourists, total

13,651,000

Arrivals of same-day visitors, total

7,410,000

Arrivals
of domestic tourists

3,000,000

Arrivals
of foreign tourists

13,435,000

Arrivals of domestic
same-day visitors

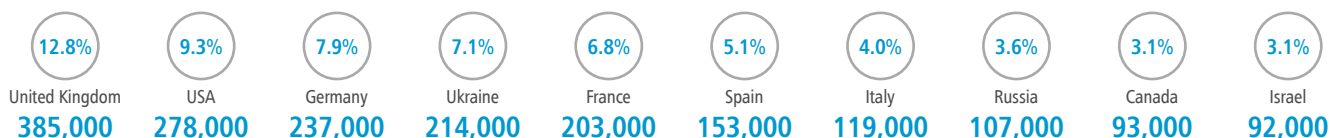
216,000

Arrivals of foreign
same-day visitors

Arrivals of tourists and same-day visitors, total

24,061,000

Arrivals of foreign tourists by country of origin (top 10)



Means of transport used by tourists coming directly to Warsaw

domestic | foreign



train

43% | 18%



car

35% | 6%



bus/coach

20% | 15%



airplane

2% | 62%

Tourist accommodation and its use

600

tourist accommodation establishments
including 99 hotels

45,215

bed places



3.6 million

tourists have used tourist
accommodation establishments

6.4 million

nights spent by tourists in tourist
accommodation establishments

Most popular main purposes of visit

domestic | foreign



sightseeing

41% | 26%



visiting relatives
or friends

14% | 10%



rest

11% | 26%



business matters/
interests

6% | 7%



learning about
the culture, history
and local customs

5% | 14%



participation
in a cultural event

5% | 2%

The biggest attractions according to tourists (top 5)



Domestic
tourists



Foreign
tourists



8.75

average tourist attractiveness of Warsaw
according to tourists (on a scale of 1 to 10)



4.36 days

average length of stay in Warsaw



169 euro

average declared amount spent per person
during stay in Warsaw



93 euro

domestic tourists



385 euro

foreign tourists

9.02

average tendency of wanting to return to Warsaw
(on a scale of 1 to 10)



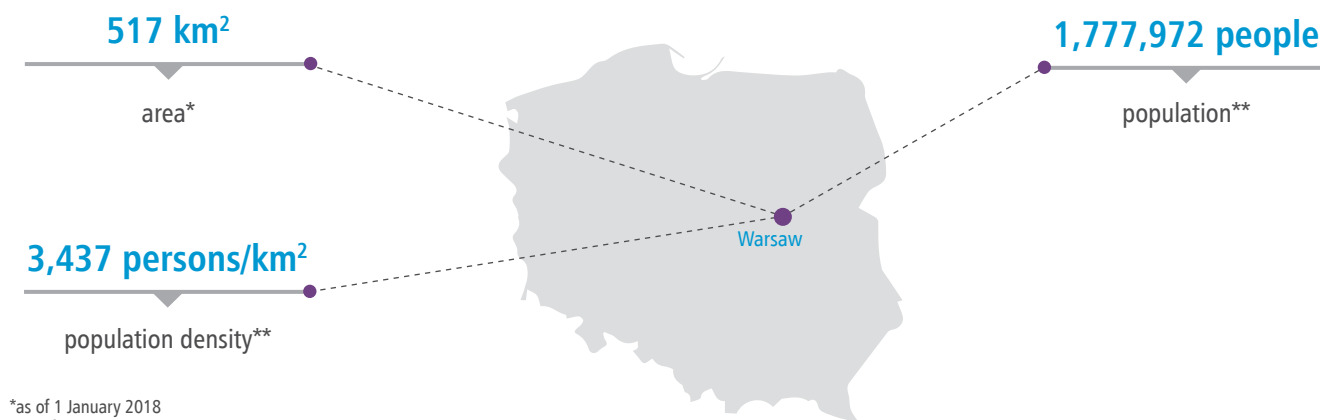
9.09

average tendency to recommend a visit to Warsaw
to family/friends (on a scale of 1 to 10)

1 WARSAW – SELECTED SOCIAL AND ECONOMIC INFORMATION

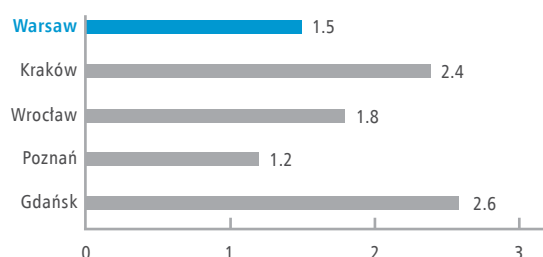


Basic data¹

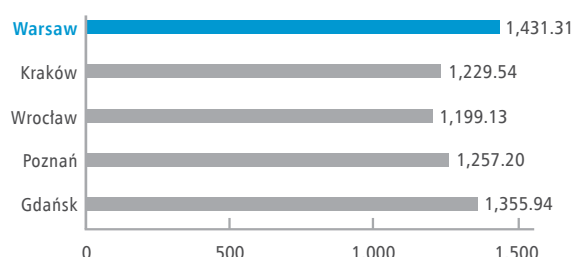


Warsaw economy compared to other selected cities in Poland²

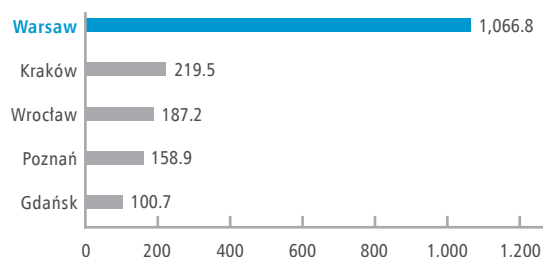
Registered unemployment rate at the end of December 2018 (%)



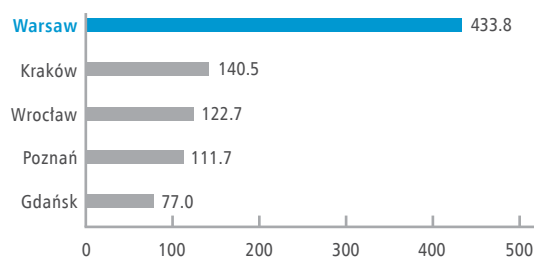
Average monthly gross wages and salaries in enterprise sector in January-December 2018 (euro)



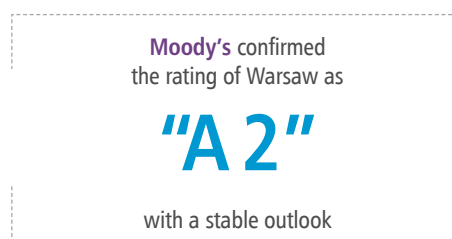
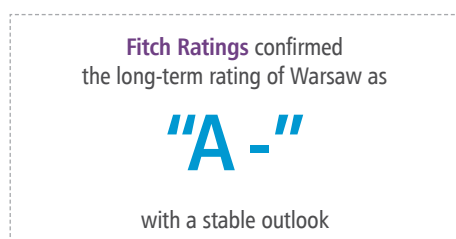
Average paid employment in enterprise sector in January-December 2018 (thousands)



Number of entities of the national economy in the REGON register at the end of December 2018 (thousands)



Creditworthiness of Warsaw according to credit rating agencies³



Warsaw in ranking tables

LaSalle E-REGI Index. European Regional Economic Growth Index 2018⁴

Ranking of European cities with the best economic prospects

17th place

[**1st place**]
among cities in Central and Eastern Europe

fDi European Cities and Regions of the Future 2018/19⁵

Ranking of most attractive European locations for future inward investment

"European Cities of the Future 2018/19"

11th place

"Major European Cities of the Future 2018/19"

7th place

[**3rd place**]
in the 'business friendliness' category

[**8th place**]
in the 'FDI strategy' category

[**9th place**]
in the 'cost effectiveness' category

"Eastern European Cities of the Future 2018/19"

2nd place

fDi Polish Cities of the Future 2017/18⁶

Ranking of most attractive Polish cities for future inward investment

1st place

[**1st place**]
in the 'economic potential' category

[**1st place**]
in the 'business friendliness' category

[**1st place**]
in the 'human capital and lifestyle' category

[**1st place**]
in the 'connectivity' category

2018 World's Most Competitive Cities⁷

World ranking of metropolitan cities able to attract investment in 12 leading industries

Region 'Eastern Europe and Central Asia'

1st place
in the 'transportation and logistics' category

2nd place
in the 'business and financial services' category

2nd place
in the 'life sciences' category

Emerging Trends in Real Estate® Europe 2018⁸

Forecasts and trends in the European real estate market

23rd place
in terms of investment and development trends

Tholons Services Globalization Index™ 2018^{9,10}

World ranking of best localisations for business services centres

22nd place

A.T. Kearney 2018 Global Cities Index¹¹

World ranking of global cities

54th place

Arcadis Sustainable Polish Cities Index¹²

Ranking taking into account the level of coherence of Polish cities with the idea of sustainable development

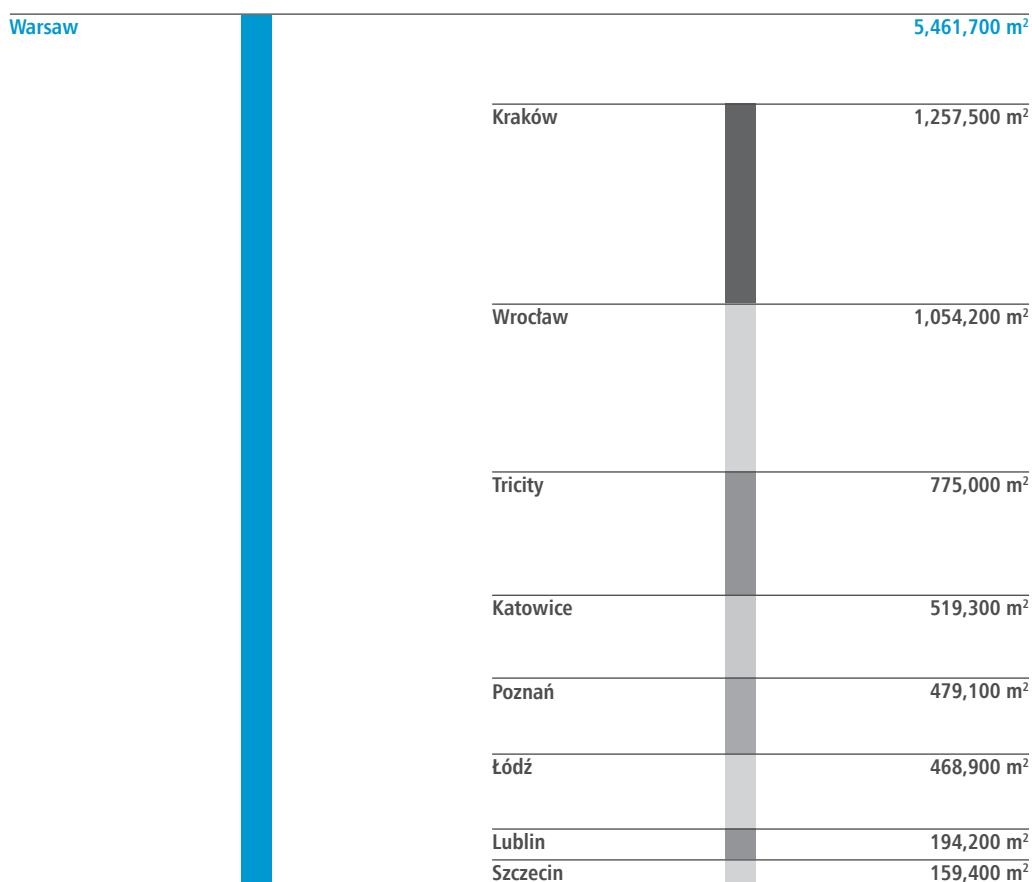
1st place
[**1st place**]
in the 'people' category

[**1st place**]
in the 'profit' category

Office and retail space in Warsaw¹³

5.46 million m ²	232,700 m ²	858,300 m ²	23.50-23.75 euro/m ² /month	13.5-14.5 euro/m ² /month
modern office space at the end of 2018	office space handed over for use	total area rented	nominal rental value for the best office space in the city centre	nominal rental value for the best office space outside the city centre

Modern office space in Warsaw compared to other selected cities in Poland at the end of 2018



Source: 13, 14



Office space in Warsaw has expanded by **75,000 m²** (an additional 8 buildings) **in post-industrial complexes and revitalised structures**. The most important include: Koneser, Elektrownia Powiśle and the Cedet building. This is a consequence of the increasing expectations of tenants with regard to the standards of buildings and their surroundings.¹³

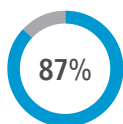


By the end of 2018, **office space under construction amounted to 743,000 m²**. Over 30% of the investment space planned to be delivered within the next two years has already been rented.¹³

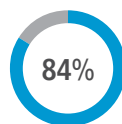


Over **1.9 million m² of modern retail space** in the Warsaw agglomeration at the end of 2018 – 70% are shopping centres, 27% are retail parks and warehouses, 3% are outlet centres. 112,000 m² of new space was delivered in 2018, of which 53% in the last quarter.¹⁵

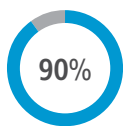
Quality of life in Warsaw



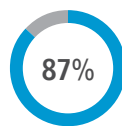
of residents have positive impressions associated with Warsaw as a place to live



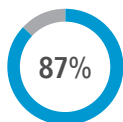
of residents, given the choice, would prefer to live in Warsaw



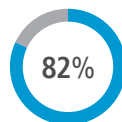
of residents have a positive opinion of safety in the city



of residents have a positive opinion of public transport in the city



of residents have a positive opinion of cleanliness and tidiness in the city



of residents have a positive opinion of greenery in the city

Source: 16



Warsaw is Poland's leader with regards to knowledge of English among residents. The capital was ranked **"very high" in terms of fluency** in the EF English Proficiency Index 2018.¹⁷



The University of Warsaw has been Poland's number one university five times in a row according to the Higher Education Institutions League Table of Perspektywy magazine. The Warsaw University of Technology came 3rd.¹⁸



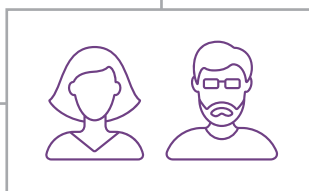
In the academic year 2017/2018, **70 higher education institutions** were functioning in Warsaw. There were **approx. 236,000 enrolled students** of which approx. 20,000 were foreigners (28% of all foreigners studying in Poland). 46% of the foreign students studying in Warsaw were Ukrainian.^{19, 20}

88%

of residents believe the development of tourism in Warsaw has a positive impact on their life

63%

of residents believe that Warsaw is not crowded with tourists



76%

of Varsovians believe their everyday life is not disturbed by tourists

3%

of Varsovians who live in the vicinity of flats or houses that are rented out to tourists experience daily negative consequences of this

Source: 21



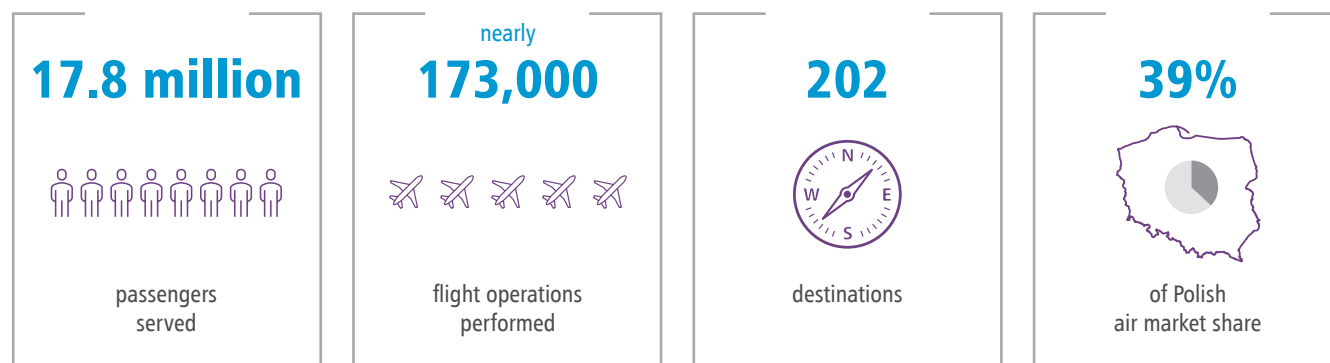
Air

Approximate direct flight times to Warsaw from selected cities



Source: 1, 2, 3

Warsaw Chopin Airport



Source: 4, 5

Distance from the centre of Warsaw⁶



Approximate travel time from airport to Warsaw centre⁷

car/taxi



Rapid
Urban
Railway



bus



LOT Polish Airlines is first in terms of number of passengers carried. Wizz Air comes second, Lufthansa third. Approx. 30% of all travellers at the airport are **transit passengers**.⁸



LOT Polish Airlines has opened up flights from Warsaw to Singapore. This is the first direct and regular connection **from Poland to South-East Asia**. The Boeing 787 Dreamliner makes the journey in approx. 12 hours.⁹



Responding to the needs of residents, Warsaw Chopin Airport has introduced "core night", **a ban on all take off and landing during the night**. Similar restrictions are in place at many European airports including Munich, Brussels, Zurich and Frankfurt.¹⁰



Largescale reproductions of the paintings of Boznańska, Chełmoński and Malczewski adorned Warsaw Chopin Airport as part of the "Polish Family Portrait" prepared for the 100-year anniversary of Poland regaining its independence.¹¹

Warsaw Modlin Airport

3.1 million



passengers
served

over
20,200



flight operations
performed

54



destinations*

7%



of Polish
air market share

*exclusively scheduled flights

Source: 5, 12

Distance from the centre of Warsaw¹³



Approximate travel time from airport to Warsaw centre^{7, 14}

car/taxi



bus



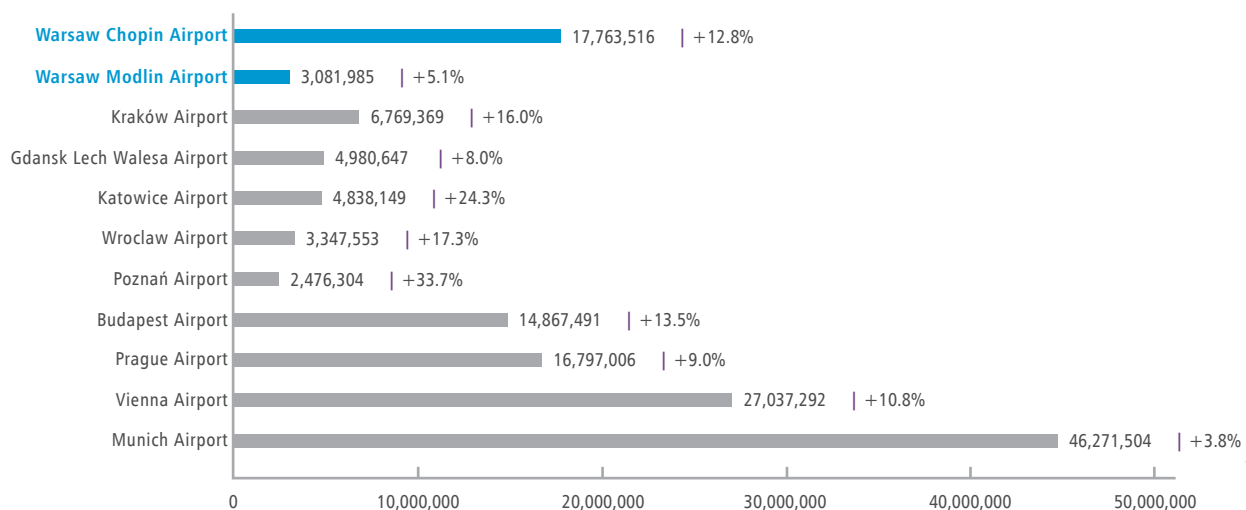
The airport served its **14 millionth passenger**, has upgraded its taxiways and a runway without the need to change its flight schedule, and the air traffic controllers have moved to new stationary and mobile air traffic control towers.¹⁵



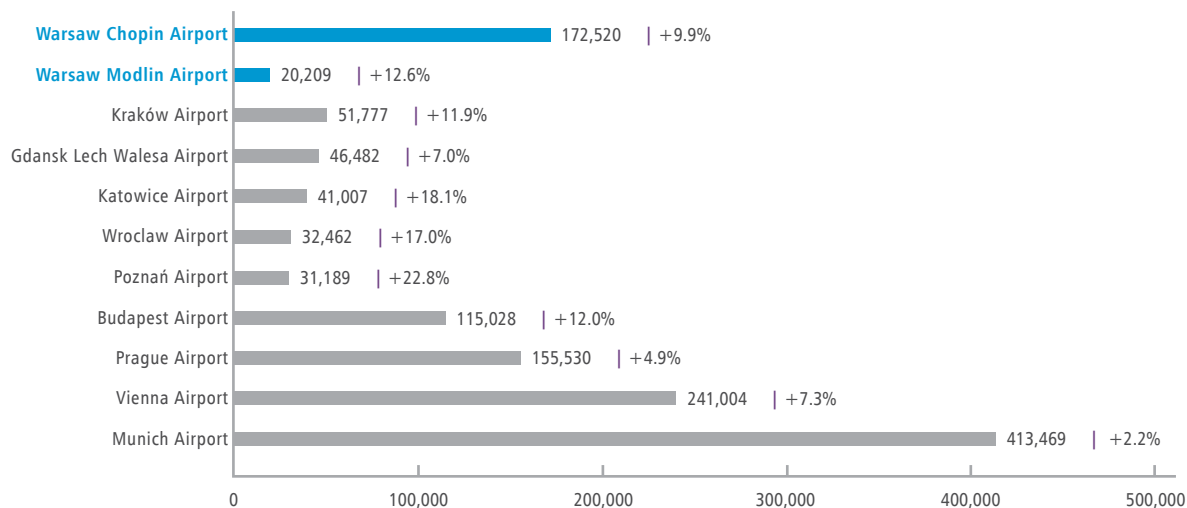
In 2018 Ryanair opened up **6 new routes** from Warsaw Modlin Airport: to Amman, Burgas, Rimini, Pescara, Lviv and Kiev.¹⁵

Warsaw Chopin Airport and Warsaw Modlin Airport in comparison to other selected airports¹⁶

Passengers served – number and percentage changes in comparison to 2017

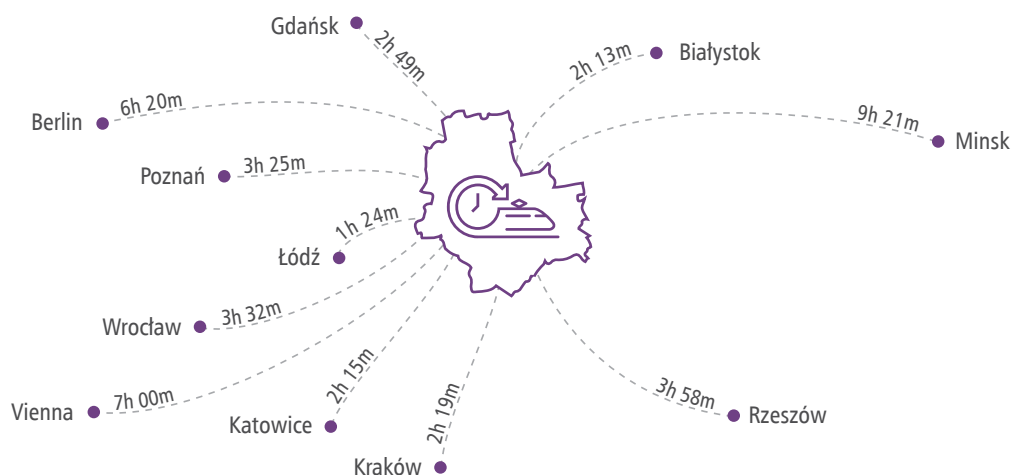


Flight operations performed – number and percentage changes in comparison to 2017



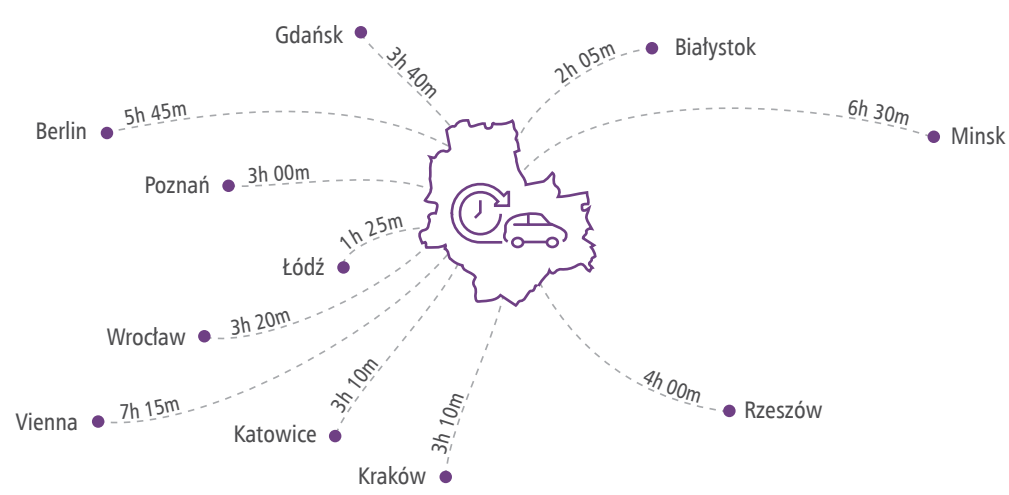
Rail¹⁷

Direct travel time to Warsaw from selected cities



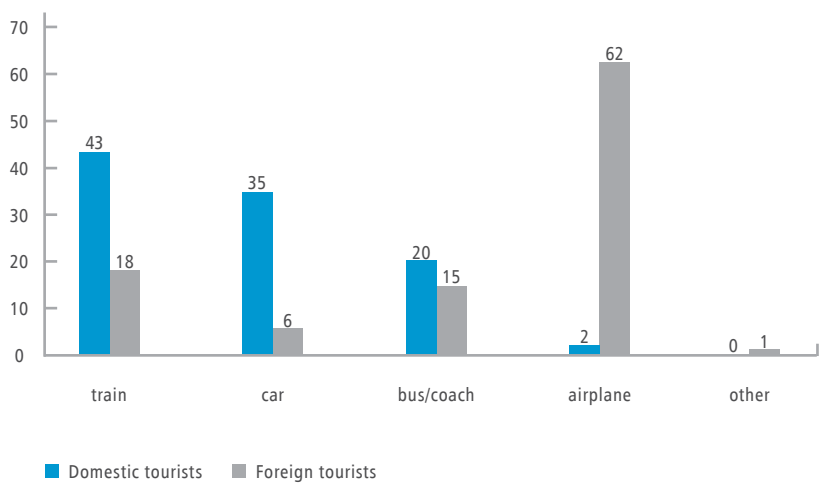
Road⁷

Approximate travel time to Warsaw from selected cities

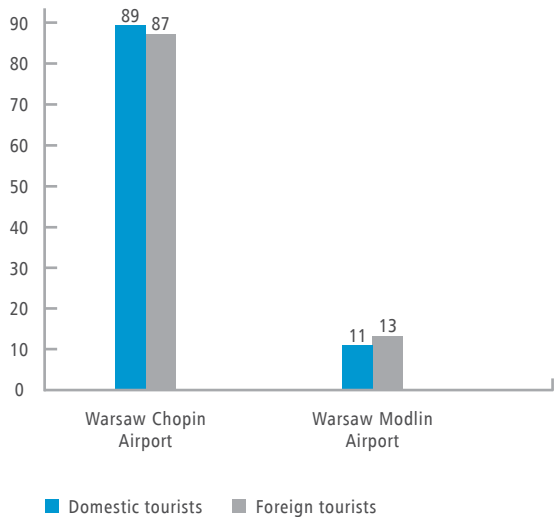


Means of transport used by tourists coming to Warsaw¹⁸

Means of transport used by tourists coming directly to Warsaw (%)



Airports of arrival to Warsaw (%)





Accommodation establishments*

*based on data of the Warsaw Tourist Office, City of Warsaw and Ministry of Sport and Tourism



600
tourist accommodation
establishments

↑ 80
in comparison to 2017



45,215
bed places*

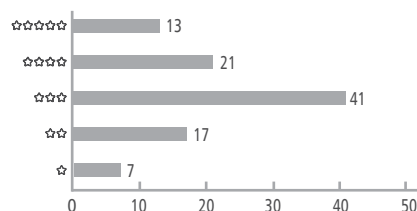
↑ 5,708
in comparison to 2017

*including 100 tent and 80 caravan pitches

Source: 1

Hotels¹

Number of establishments

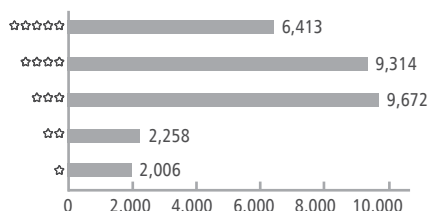


99

total

↑ 7
in comparison to 2017

Number of bed places

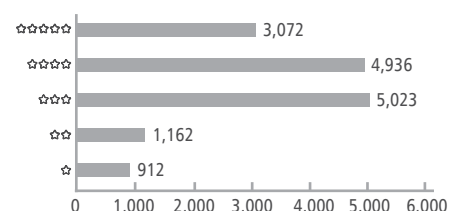


29,663

total

↑ 2,757
in comparison to 2017

Number of rooms

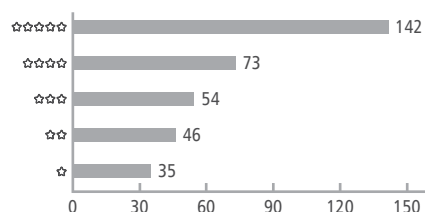


15,105

total

↑ 1,139
in comparison to 2017

Average price of a double room (euro)*

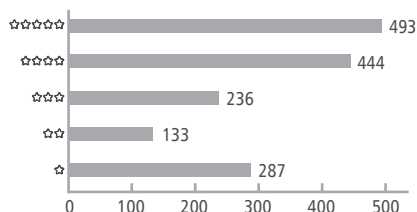


70

average

↑ 4
in comparison to 2017

Average number of bed places in hotel

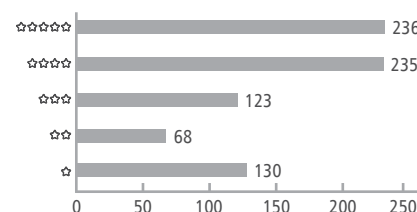


318

average

↑ 26
in comparison to 2017

Average number of rooms in hotel



159

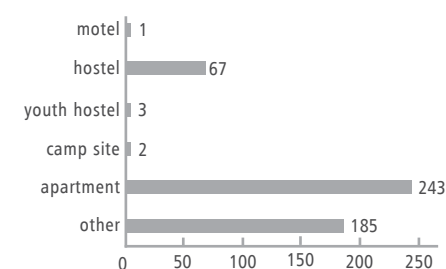
average

↑ 7
in comparison to 2017

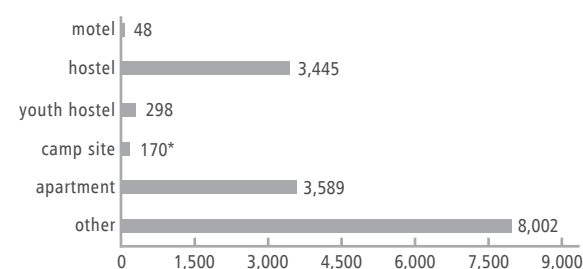
*average calculated on the basis of the lowest prices for a double room in hotels of a given category

Other tourist accommodation establishments¹

Number of establishments



Number of bed places



*including 100 tent and 80 caravan pitches

Use of tourist accommodation establishments*

*data of the Central Statistical Office from establishments with over 10 bed places including imputation for establishments that declined to take part in the research

Number of users, nights spent and rented rooms²



3,647,746

tourists have used accommodation establishments



2.5% in comparison to 2017

1,364,522

foreign tourists have used accommodation establishments



1.8% in comparison to 2017

37%

of all tourists making use of accommodation establishments



6,383,608

nights spent by tourists in accommodation establishments



3.6% in comparison to 2017

2,633,937

nights spent by foreign tourists in accommodation establishments



3.2% in comparison to 2017

41%

of all nights spent by tourists in Warsaw



3,603,739

rooms rented by tourists in hotels

71.9%

occupancy in hotels



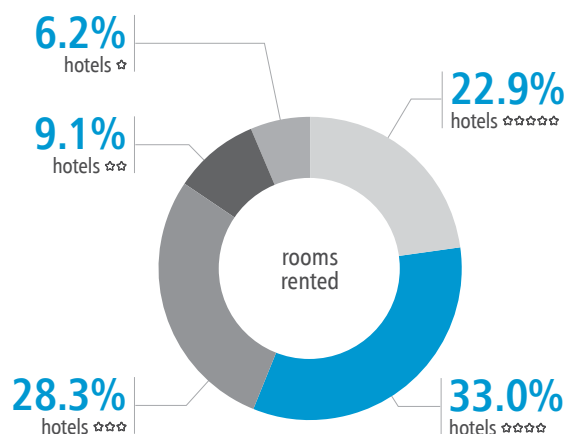
2.5 pp in comparison to 2017

highest occupancy in June

81%

lowest occupancy in January

59%



1.8
nights

average duration of stay by tourists in accommodation establishments (1.9 nights for foreign tourists)

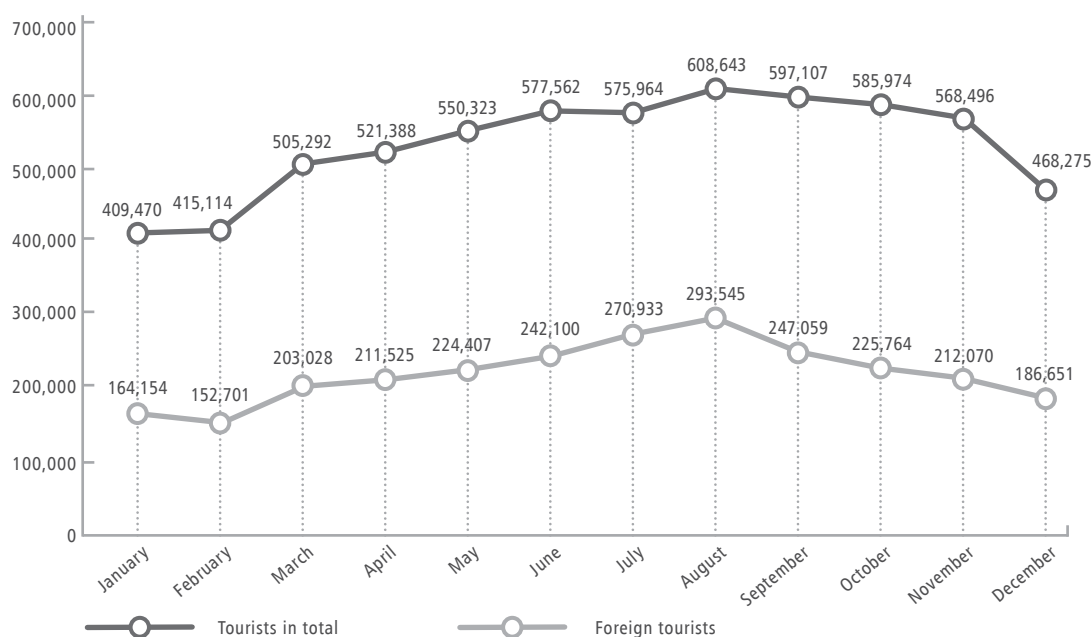
1st
place

of Warsaw among Poland's counties and cities with county rights in terms of the number of nights spent by tourists (6.4 million), ahead of both Kraków (5.6 million) and the seaside county of Kołobrzeg (5.1 million)

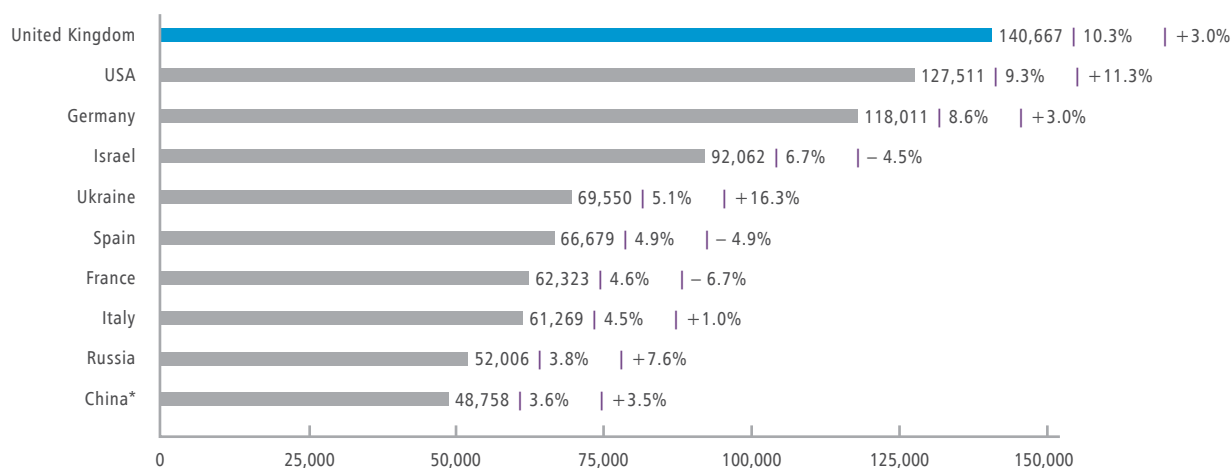
41st
place

of Warsaw among Poland's counties and cities with county rights in terms of the number of nights spent per 1,000 people

Nights spent by tourists by months²

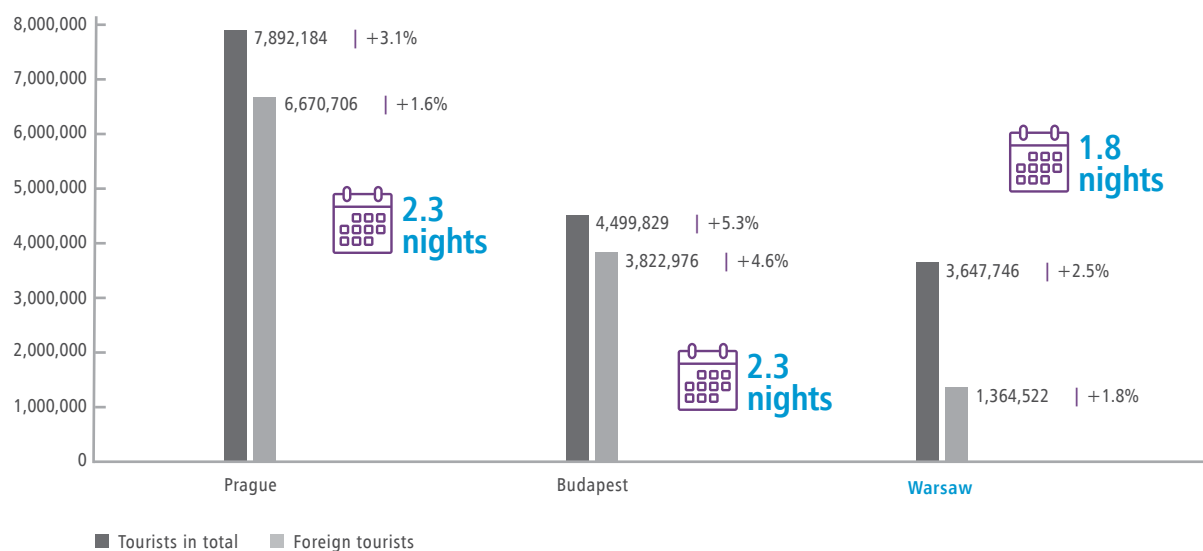


Foreign tourists making use of accommodation establishments – top 10 by country of residence (number, share and percentage change in comparison to 2017)²



*not including Taiwan

Tourists making use of accommodation establishments in selected cities (number, percentage change in comparison to 2017 and average length of stay)⁴



Selected tourist accommodation information

↑ 1.4%

change in the average ADR
of hotel rooms (average daily rate)*

↓ 2%

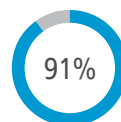
change in the RevPAR
of hotel rooms (revenue per available room)*

*data for first six months in comparison to analogical period in 2017

Source: 5



95% of tourists visiting Warsaw spend
the night within the city boundaries⁶



91% of tourists have a positive opinion
of tourist accommodation*

*people who have used this type of service

Source: 6

Rental of accommodation establishments by Airbnb and HomeAway⁷

6,347



available accommodation
establishments for rent
(houses, apartments etc.)

30%

of accommodation
establishments available
for 1-3 months

28%

of accommodation
establishments available
for 10-12 months

73%



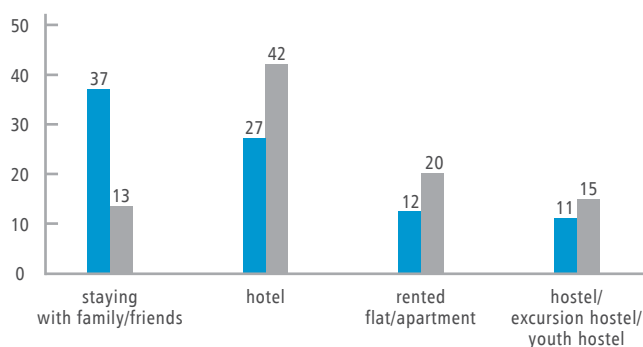
occupancy
in September 2018

51 euro



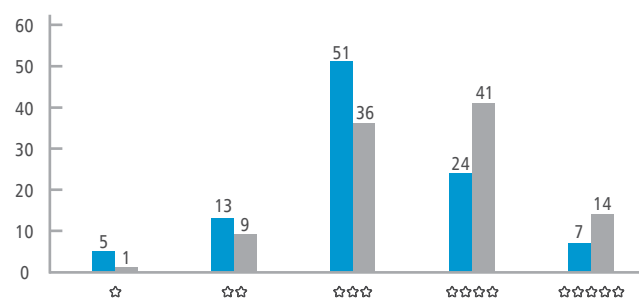
ADR
for June 2018

Main types of accommodation used by tourists (%)⁶



■ Domestic tourists ■ Foreign tourists

Standard of hotels used by tourists (%)⁶



■ Domestic tourists ■ Foreign tourists



Located in a 19th century building on Krakowskie Przedmieście street, Hotel Europejski has returned to its pre-war glory following extensive renovation work. It has joined the famous luxury Raffles Hotels & Resorts network, and TIME magazine placed it on the list of "World's Greatest Places 2018". **Raffles Europejski** has a collection of 500 paintings by Polish artists. Part of one of the two 300-metre suites is the Pompejańska Room, known from Bolesław Prus' famous novel "The Doll".^{8, 9, 10, 11}



A symbol of modern 1930s Warsaw, the Prudential building has been given a new lease of life. Originally built in an art déco style, the tower underwent extensive renovation and has re-opened as the five-star **Hotel Warszawa**. After Raffles Europejski, it is the second most expensive hotel in the capital. Its modern design and furniture contrast with the industrial concrete parts; the brown-copper colour scheme of the interior give it both a luxury and intimate feel.^{12, 13}



Tourist attractions – visitors* and selected events



The Royal Łazienki Museum in Warsaw¹


3,500,000

A concert by the U.S. Air Forces in Europe Band aka “Ambassadors” was part of the “100 years Together” campaign. Famous for their classic jazz pieces, the musicians celebrated Polish-American relations by bringing the audience back to the era of swing.²

A sensory-rich playground was opened allowing both disabled and able-bodied children to play together. It was established thanks to the support of participants of Warsaw’s running events.³



Museum of King Jan III's Palace at Wilanów⁴


3,151,000

An exhibition of furniture that was stolen during WWII and returned to the Museum thanks to Polish-German cooperation. Two exquisitely restored 18th century writing desks are extremely valuable and rare exhibits.⁵

The Warsaw Culinary Festival offered workshops, cooking demonstrations, discussion panels, walks, film shows and other attractions to its participants. The motto of this second festival was the “Royal Table”, and its theme was Poland’s culinary heritage and culinary education.⁶



National Museum in Warsaw⁷


296,000**

Approx. 300 pieces of work by Poland’s finest artists, including paintings, sculptures, engravings and drawings could be marvelled at during the “Shouting: Poland! Independence 1918” temporary exhibition. This was the final part of the “3 x Independent” project whose first parts included the “Paderewski” and “Józef Brandt 1841-1915” exhibitions.⁸

On one summer day, visitors to the Museum could feel the atmosphere of days gone by when visitors would frequent museums in felt slippers. Every one who visited the Museum in their favourite slippers was able to gain entry to the permanent galleries free of charge.⁹



The Royal Castle in Warsaw – Museum¹⁰


717,000

Opening of the “Marcello Bacciarelli. The Most Beautiful Portraits” temporary exhibition, presenting approx. 50 art pieces of the court painter to King Stanisław August. The exhibition is a chronological cross-section of his portrait portfolio. Some of these artworks are being presented in Poland for the first time.¹¹

The tower of the Royal Castle has regained its former glory thanks to gilding around the coat-of-arms and the cornice, a cleaned and plastered façade, lightening of the brick-red colour of the rounded pilasters, and conservation work and restarting of the clock.¹²



The Warsaw Rising Museum¹³


718,000

The Museum was the first Warsaw winner of the “Oscars” of tourism: a Gold Certificate for Best Tourism Product in Poland granted by the committee of the Polish Tourism Organisation.^{14, 15}

Principle photography for the film “Kurier” began in June, directed by the multi-award winning master of Polish drama Władysław Pasikowski. The Museum was both the initiator and co-producer of the first big budget feature film about war hero Jan Nowak-Jeziorański.^{16, 17}



POLIN Museum of the History of Polish Jews¹⁸


691,000

Over 116,000 people visited the “Estranged. March '68 and Its Aftermath” temporary exhibition, commemorating the reasons, development and consequences of the greatest campaign of antisemitism in the history of post-war Poland.^{18, 19}

An audience of 2,500 people who gathered on the square before the Monument to the Ghetto Heroes were treated to a piece specially composed for the occasion by Radzimir Dębski during the “Remembering Together” concert for the 75th anniversary of the Warsaw Ghetto Uprising.²⁰



The Fryderyk Chopin Museum in Warsaw²¹



104,000

The opening of the “Paderewski for Chopin” temporary exhibition shows Ignacy Jan Paderewski as a performer and promoter of the works of Fryderyk Chopin. Some of the 40 mementos are being exhibited for the first time.²²

During a celebratory concert, the Fryderyk Chopin Institute presented a Buchholtz piano, the world's first copy of the instrument owned by the Chopin family which the young Fryderyk liked to play.^{23, 24}



Museum of Warsaw²⁵



87,000**

The second part of “The Things of Warsaw” core exhibition was open for visitors. 13 themed rooms include, amongst others, a marble dolphin from the Villa Regia palace and the cigarette case of the famous Mayor of Warsaw Stefan Starzyński.²⁶

A cuddly monkey belonging to Wanda Traczyk-Stawska, a participant of the Warsaw Uprising found its way into the Museum collection. The stuffed toy which accompanied her while in exile in POW camps and in volunteer schools now “lives” in the Room of Relics.^{27, 28}



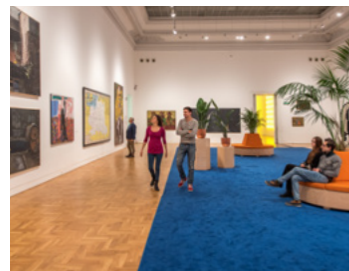
National Ethnographic Museum in Warsaw²⁹



190,000

The Museum opened the Korean Gallery which is the largest collection of Korean artefacts in Poland. The main focus of the exhibition is a replica of a Korean house, a hanok, designed with the idea of “borrowing beauty from nature”.^{30, 31}

The “Fly Away” temporary exhibition kicked off celebrations of the Museum’s 130th anniversary. Despite presenting images of birds, the exhibition really tells us about bird watchers and those describing birds while reaching for the language of myth, art, nature and folklore.³²



Zachęta – National Gallery of Art³³



189,000

The opening of the “Beyond Cybis” exhibition presenting the work of leading figures of Polish contemporary art and finalists of the Jan Cybis Award. The starting point of the exhibition was the belief in the sense of painting and its infinite possibilities.³⁴

In the summer, as part of the “Plac Małachowskiego 3” project, the space in front of Zachęta was closed to cars and given over to artists who presented a host of performances and installations.³⁵



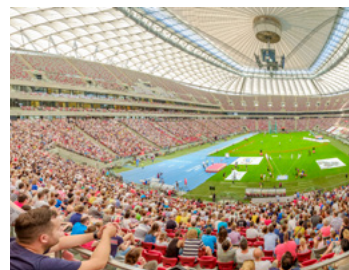
Copernicus Science Centre³⁶



1,144,000

Copernicus Science Centre invited lovers of astronomy to watch the total eclipse of the moon together. Discovery Park was filled with telescopes and Copernicus staff were ready to tell visitors about this rare and spectacular phenomenon.³⁷

Copernicus prepared the first ever escape room for the youngest of science lovers on the anniversary of Nikola Tesla’s birth. Children were able to visit Tesla’s labs and solve puzzles inspired by his inventions.³⁸



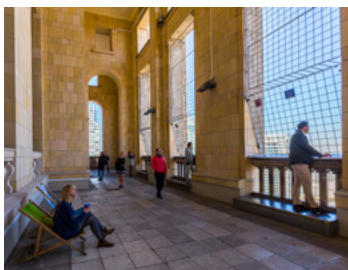
PGE Narodowy Stadium³⁹



2,036,000

The “Concert for the Independent” featured 300 artists, patriotic and recreational songs from the last 100 years as well as historical dramatizations. A 40,000-strong audience saw the concert commemorating the 100th anniversary of Poland regaining its independence.⁴⁰

Record high attendances of approx. 12,000 lovers of board games, including 8,000 gamers, visited Warsaw Board Games Festival at the PGE Narodowy. It witnessed, amongst others, competitions, game premieres and demonstrations of board game illustrating.⁴¹



Palace of Culture and Science in Warsaw⁴²



687,000***

The viewing terrace on the 30th floor is as good as new. After being cleaned hydrodynamically, the façade has regained its original cream colouring; the impact of this renovation is truly magnificent.⁴³

The world exhibition dedicated to Napoleon Bonaparte in the Palace and Culture and Science. It is the greatest collection of objects belonging to Napoleon ever to be shown in Poland.⁴⁴



City Zoological Garden in Warsaw⁴⁵



898,000

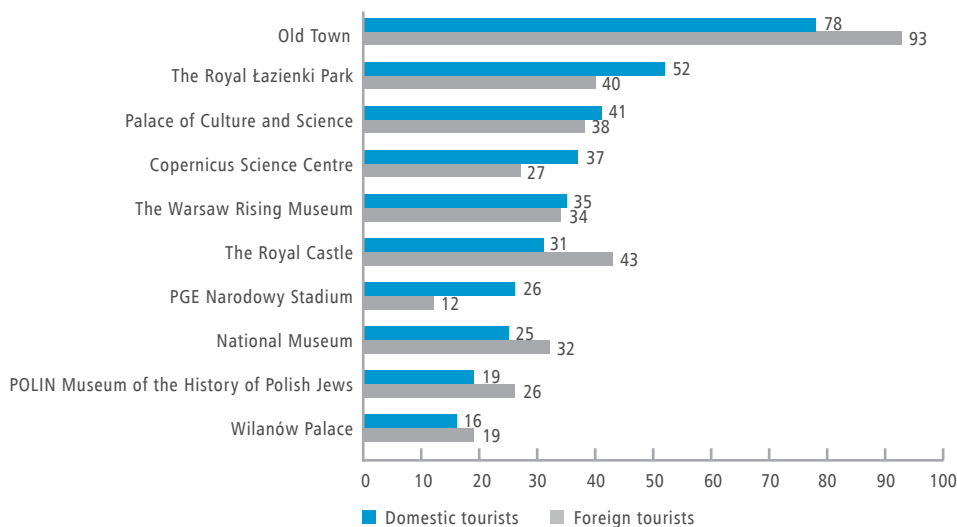
An exhibition recounts the history of the zoo as well as a mural featuring the well-known artistic talents of Lucy the chimp. These attractions and others accompanied the celebrations of the 90th anniversary of Warsaw Zoo. The main theme of the celebrations was the protection of endangered animal species.^{46, 47}

The main avenue of the Zoo has been renovated. There, during summertime, visitors could take in a temporary exhibition of portraits of endangered animal species authored by Joel Sartore, the multi-award-winning National Geographic photographer.^{48, 49}

*approximate data, or data rounded to nearest thousand; **number of visitors to the headquarters; ***number of visitors to the viewing terrace on the 30th floor of the Palace

Tourist attractions in numbers

Main sights and attractions visited by tourists in Warsaw (%)*



22.6 million

tourists and same-day visitors took in Zamkowy Square*

*between 10.2017 and 09.2018

Source: 51

*total percentage data is over 100% as respondents could indicate more than one sight

Source: 50

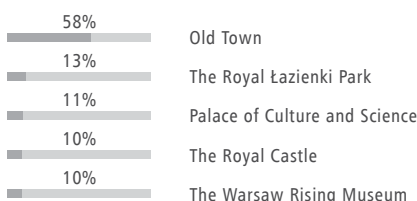
The biggest tourist attractions in Warsaw according to tourists (top 5)*



Domestic tourists



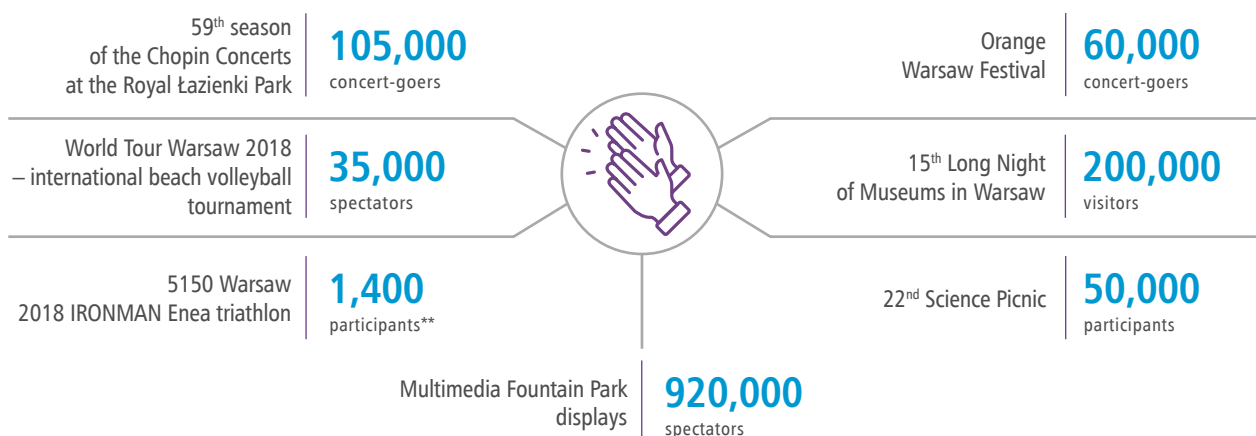
Foreign tourists



*total percentage data is over 100% as respondents could indicate more than one place

Source: 50

Selected events – attendances*



*approximate data, or data rounded to nearest thousand

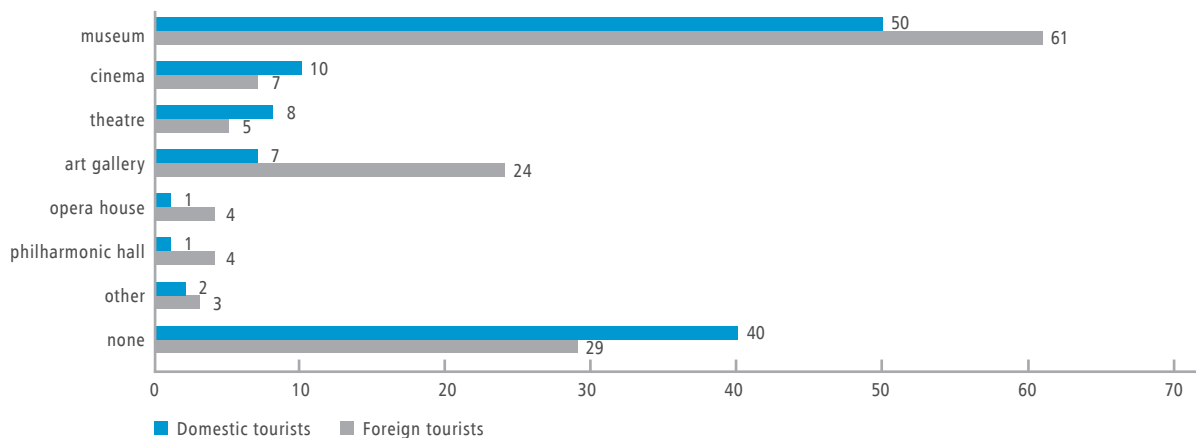
**participants of triathlon or accompanying events

Source: 36, 52, 53, 54, 55, 56



14% of tourists took part in an event such as a concert, festival, fair or sports event during their stay in Warsaw⁵⁰

Cultural institutions – visited by tourists while in Warsaw (%)*



*total percentage data is over 100% as respondents could indicate more than one place

Source: 50

Selected cultural institutions – attendances*



*approximate data, or data rounded to nearest thousand

**including visitors to the Theatre Museum

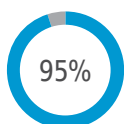
Source: 57, 58, 59, 60



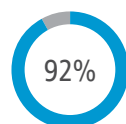
Warsaw included in an international group of cities **most welcoming of vegans**. The capital city came 7th in the Happy Cow website league table, which is helping create a global map of vegetarian cuisine. Warsaw prides itself on 47 completely-vegan restaurants.⁶¹



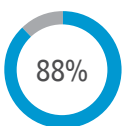
570 km-long cycle network with over 370 rental stations and 6.4 million hired bicycles as part of the Warsaw's Veturilo Public Bike system. Warsaw is number 1 in the **2018 Polish Cities Cycling League Table**.^{62, 63}



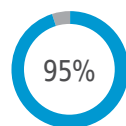
of tourists have a positive opinion of the cultural attractions on offer*



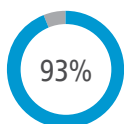
of tourists have a positive opinion of the entertainment attractions on offer (club, disco, pub)*



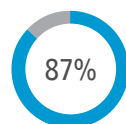
of tourists have a positive opinion of the recreational and sporting facilities on offer*



of tourists have a positive opinion of the shops and shopping centres on offer*



of tourists have a positive opinion of the gastronomy infrastructure*



of tourists have a positive opinion of the customer service in tourist information points*

*people who have used this type of service

Source: 50



Touristic Warsaw is not only the Old Town or Royal Łazienki Park. In order to really discover the city and get a real feel for it, it's worth going off the beaten track. Each district has its hidden treasures: monuments, museums, relaxing green spaces, and a variety of cultural and sports events. Tourists increasingly go looking for those genuine local gems, and Warsaw suits their tastes perfectly.



Koneser returns to Warsaw

This revitalised urban space is the former "Koneser" Warsaw Vodka Distillery. The central part of this post-industrial complex is a square that is open to everyone. A host of festivals, concerts, exhibitions and other cultural events take place here. Koneser is also home to some unique bars and restaurants as well as the Warsaw Google Campus for startups. The Museum of Polish Vodka is located in the historic Rectification Plant and presents the history and tradition of the distillation of this beverage.

Source: 1, 2, 3, 4



69,000 visitors!

This many people visited the Neon Museum which holds a unique collection of post-war neon advertisements. Some were designed by leading artists and graphic designers, part of the Polish School of Posters. In 2018, the restored "Społem" neon sign was added to the collection; it came from the now defunct and famous "Sezam" Department Store. It made its public debut during the 15th Long Night of Museums.

Source: 5, 6, 7





Made of brick and granite, the **William Lindley Filter Station Complex** is a fine example of 19th century industrial architecture. Recognised as a historical monument, the water filters are truly unique on a European scale. Perfectly preserved, they still operate according to their original purpose and design by the outstanding British engineer William Lindley. The slow filters are the only functioning tanks of this type in the world.

Source: 8, 9, 10



Gastronomy, sport and culture under one roof

Hala Gwardii is not only a popular market and restaurant spot, but also a venue for many interesting events, such as the famous Red Bull Street Style football tricks tournament, an international boxing gala and the Patyna Market bazaar with its unique vintage objects. Hala Gwardii is home to a Boxing Museum named after the father of Polish boxing Feliks Stamm, and contains memorabilia of leading Polish boxers.

Source: 11, 12, 13, 14, 15



The Katyń Museum is the first ever building in Warsaw to reach the final of the prestigious EU Mies Award (named for Mies van der Rohe). An international community of architects has recognised the impressive revitalisation of part of the Citadel, which a century before was a prison and the place of death of many fighters of Polish independence. It became the headquarters of the Museum in 2015, and today museum-goers can discover the fate of Polish officers who were shot dead during WWII and buried in mass graves in Katyń in what is today's Russia.

Source: 16, 17





118,000 visitors!

This many people visited Królikarnia and the Xawery Dunikowski Museum of Sculpture located within; it holds the largest collection of sculptures in Poland. The name of this palace, charmingly located on an escarpment, dates back to the first half of the 18th century. It was then home to a menagerie with rabbit hunting often taking place there. Currently, Królikarnia hosts a variety of exhibitions, concerts and performances, and sculptures from a large collection of the National Museum of Warsaw adorn its historic park. Many outdoor events take place here in the summer.

Source: 18, 19



Everyday life under communist rule

Visitors to the Museum of Life Under Communism get to see a typical communist era flat, can sit inside a 'cult' Fiat 126p and even enjoy a coffee from a genuine 1950s espresso machine. The Museum's collection includes some truly unique exhibits such as a soda machine which once offered sparkling water to people on the streets of Warsaw. The museum is found on Plac Konstytucji (Constitution Square), in the heart of the MDM social realist housing estate.

Source: 20, 21



The Poster Museum at Wilanów

is the first museum of its kind in the world. It houses over 60,000 posters by Polish and foreign artists. A special place in the collection is reserved for the work of artists of the world-famous Polish School of Posters, such as Henryk Tomaszewski, Jan Młodożeniec, and Wojciech Fangor. The Museum has organised over 300 exhibitions for the past fifty years since its foundation. Many have been taken abroad, amongst others, at such prestigious locations as the Museum of Modern Art in New York, Musée des Arts Décoratifs in Paris, and Deutsches Historisches Museum in Berlin.

Source: 22





451 races!

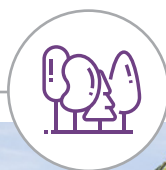
This number of races has been held at Służewiec Racecourse. The most prestigious race of the season was the 105th Grand Warsaw Race. Not only is it an important sporting event, but also a popular social occasion, during which the competition for the most beautiful 1920s costume takes place. With an area of 150 hectares, this modernist complex has been a venue for a variety of events; concerts have included The Rolling Stones, Kings of Leon, Florence and the Machine, and Lana del Rey.

Source: 23, 24, 25, 26, 27, 28



Saska Kępa is one of the trendiest areas of Warsaw. Despite only being incorporated into the city at the beginning of the 20th century, Saska Kępa now attracts visitors with its beautiful architecture, atmospheric restaurants, cosy cafes lining Francuska street, and countless events, including the annual Saska Kępa Festival. It enjoyed its greatest growth in the 1920s with many modernist villas sprouting up for wealthy Varsovians (artists, intellectuals, aristocrats). This included a building inspired by the famous French urbanist Le Corbusier at 9/11/11a Katowicka street, an avant-garde-inspired villa at 2 Francuska street, and a Streamline Moderne house at 6/8 Elsterska street.

Source: 29, 30



Relaxing in nature with a view of Warsaw

The Garden of the University of Warsaw Library is one of the most beautiful roof gardens in Europe. Not only does it attract students, but also local residents and tourists. Its colourful plants have created a lush, green maze of nooks and crannies, where you can find a fish-filled pond, fountains, cascades, charming little paths, bridges and pergolas. A key attraction is the view from the suspended footbridge: a magnificent panorama of Warsaw and the “wild” bank of the Vistula. Concerts, city games and outdoor cinema shows take place here during the summer.

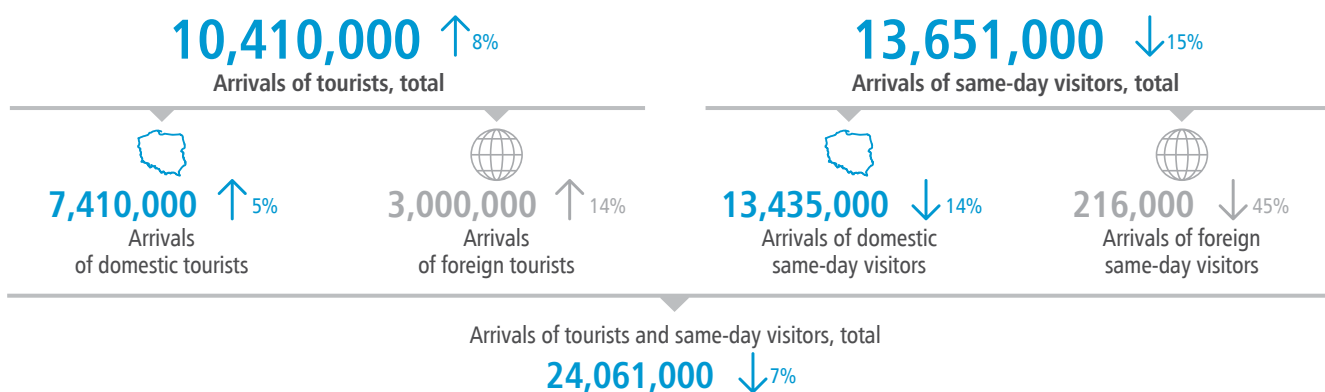
Source: 31, 32



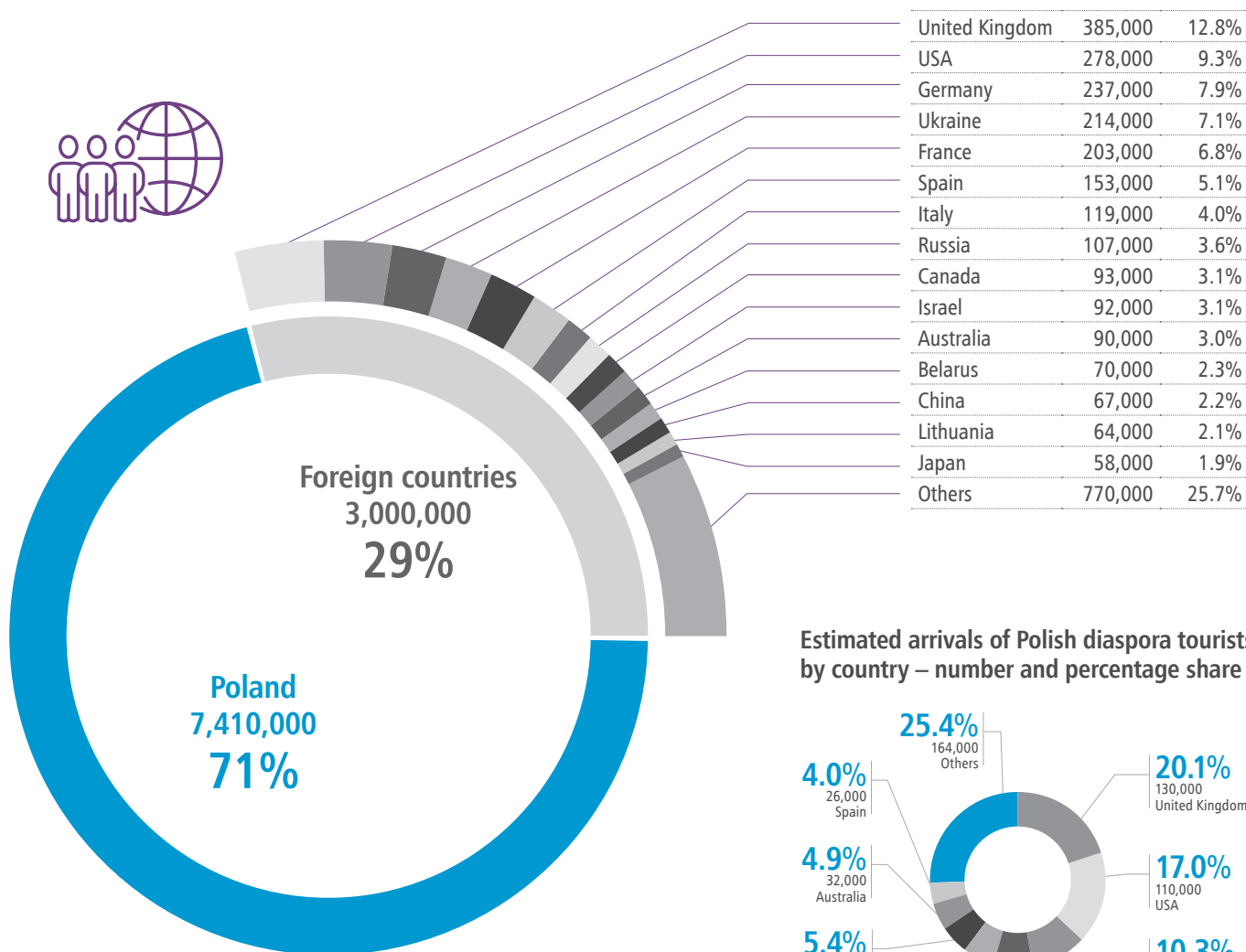


Estimated size of tourist traffic¹

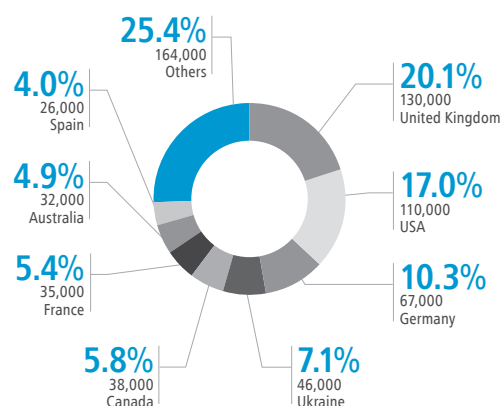
Estimated arrivals of tourists and same-day visitors – number and percentage change in comparison to 2017



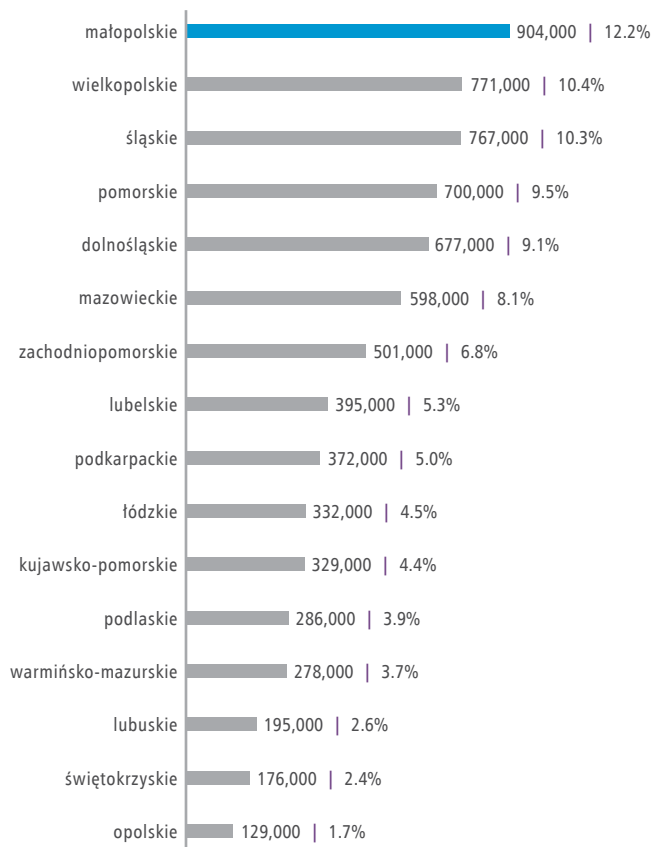
Estimated arrivals of tourists by country – number and percentage share



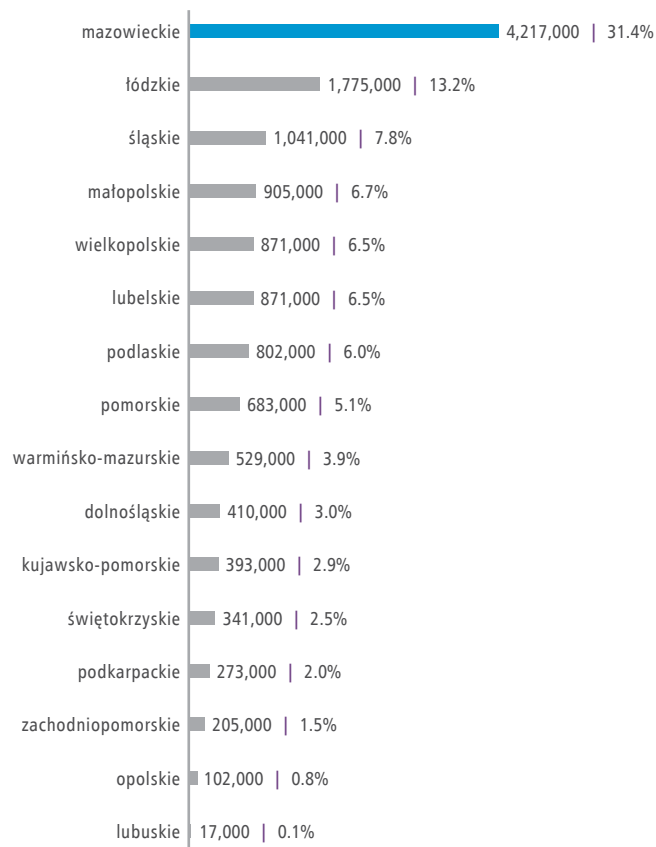
Estimated arrivals of Polish diaspora tourists by country – number and percentage share



Estimated arrivals of domestic tourists by voivodship – number and percentage share

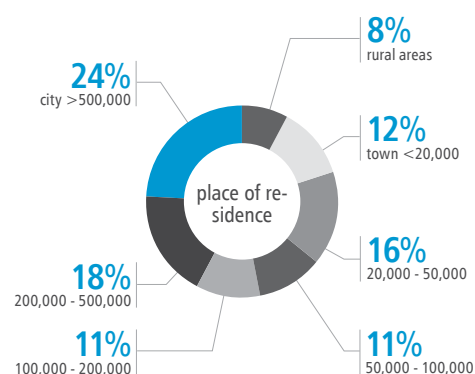
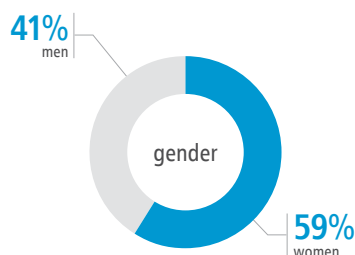
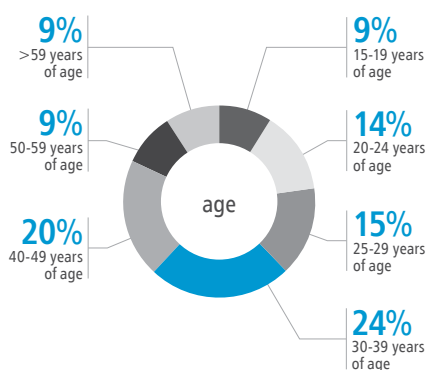


Estimated arrivals of domestic same-day visitors by voivodship – number and percentage share

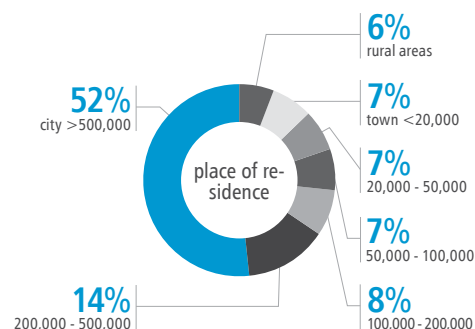
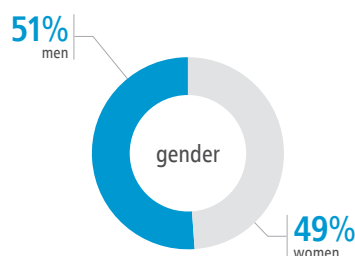
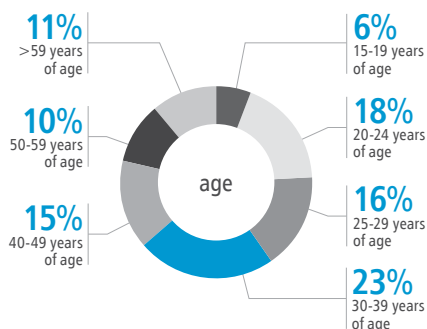


Profile of tourists visiting Warsaw

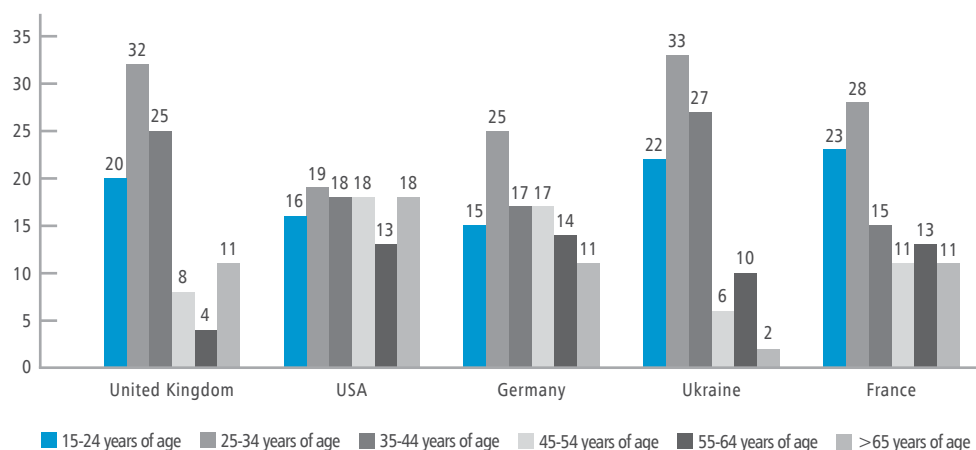
Domestic tourists²



Foreign tourists²

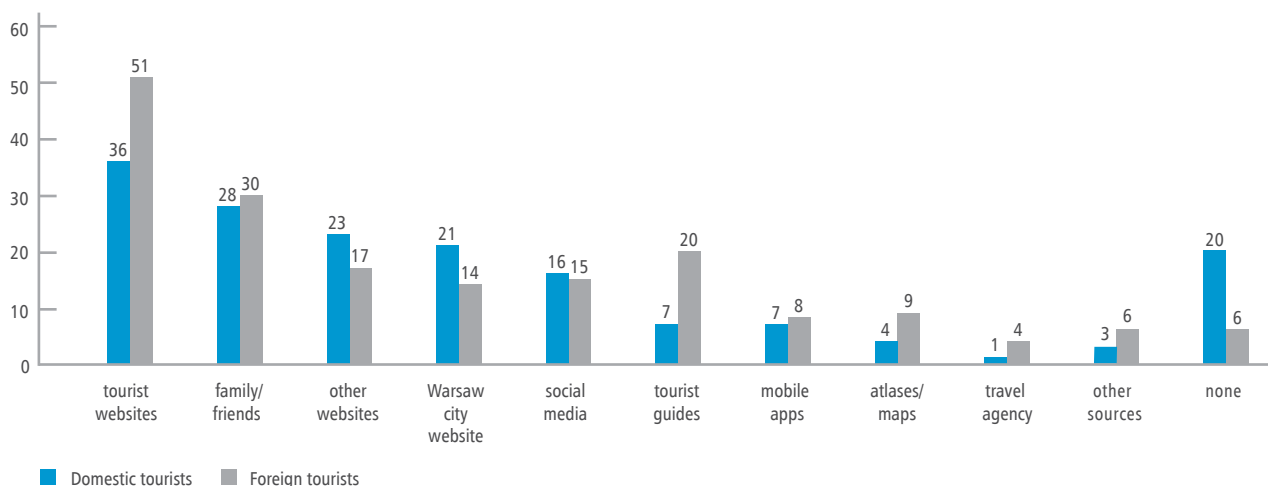


Foreign tourists – main countries divided into age groups (%)³



Profile of a tourist's stay in Warsaw

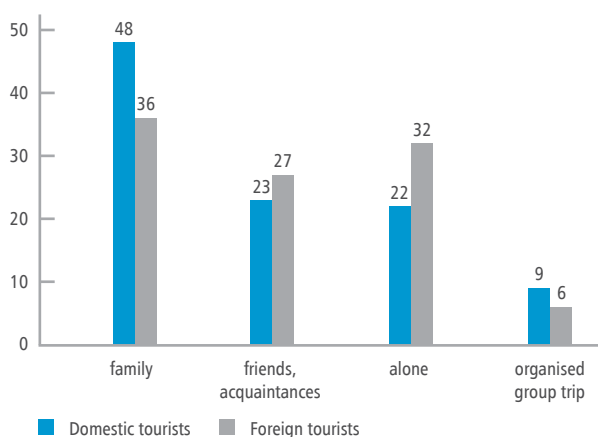
Sources of information about Warsaw (%)^{*}



^{*}total percentage data is over 100% as respondents could indicate more than one source

Source: 2

Travel companions while going to Warsaw (%)^{*}



^{*}total percentage data is over 100% as respondents could indicate more than one answer

Source: 2

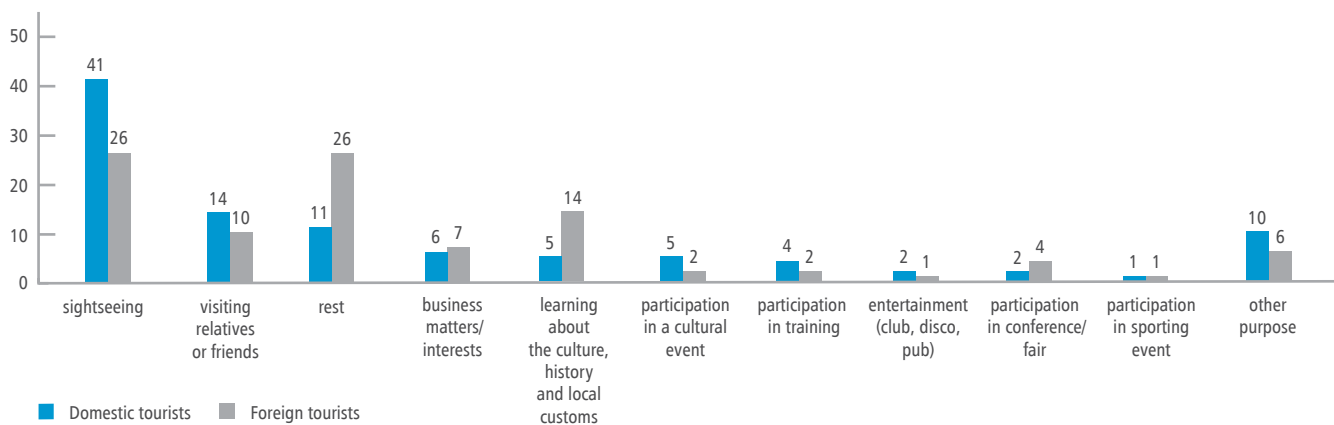


82% of tourists organise their trip to Warsaw by themselves, for 6% of tourists, the trip is organised by family or friends²

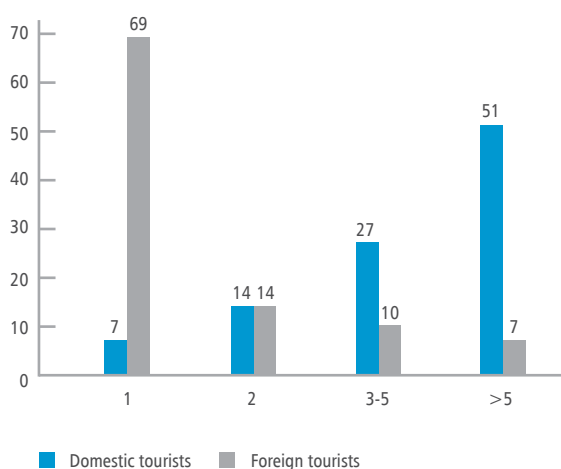


84% of tourists come to Warsaw directly from their place of residence²

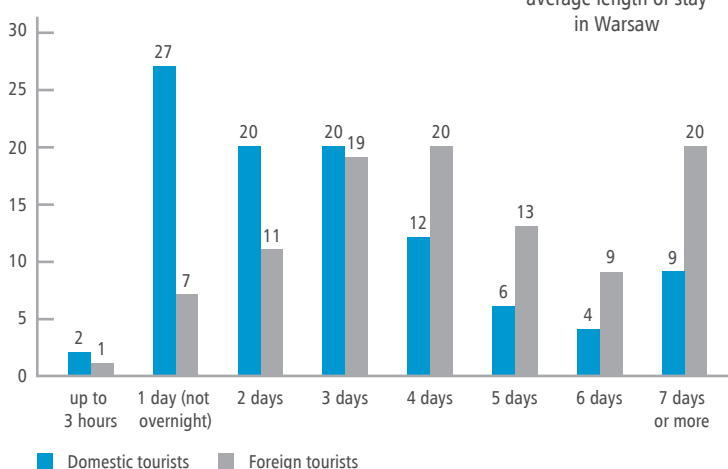
Main purpose of visiting Warsaw (%)²



Number of visits to Warsaw (%)²



Length of stay in Warsaw (%)³

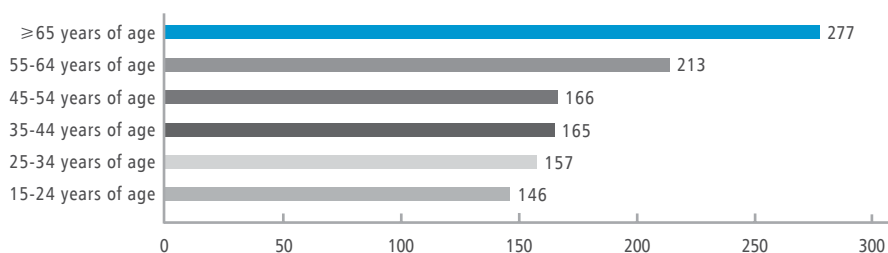


4.36 days

average length of stay in Warsaw

Average declared amount spent per person during stay in Warsaw³

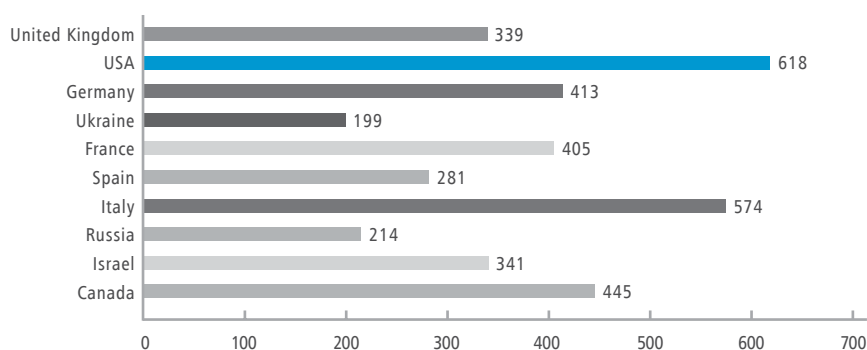
Divided into age groups (euro)



169 euro ↓ 25 euro

average declared amount spent per person during stay in Warsaw and change in comparison to 2017

Divided into main countries (euro)



MEETINGS INDUSTRY



Warsaw is **the largest and most important destination** for scientific and business events in Poland. It is a hub for political, economic, scientific, and cultural interests in the entire region of Central and Eastern Europe. Many institutions and organisations from the region have their seats here, naturally guaranteeing an inflow of ideas, innovation and capital.



Warsaw is the **unquestioned leader** in terms of the number of business and scientific events in Poland (congresses, conferences, fairs, incentive meetings, events) – almost 13,500* took place in 2018.



From among over **200 key MICE venues** in the capital, there are numerous conference centres and hotels with conference capabilities as well as venues like museums, theatres, universities and colleges with conference rooms.



From the perspective of the meetings industry, Warsaw is **the best connected Polish city in terms of domestic and international air traffic**, and has the best hotel conference infrastructure.

*data collected from the Demand Outlook system maintained by Z-Factor

Source: 1

The most important events in 2018¹

Amnesty International Global Assembly	3 days	250 participants	Oracle Code Warsaw 2018 International Conference	1 day	700 participants
10 th International Congress of the Polish Society for Vascular Surgery	3 days	600 participants	Conference of the International Association of Young Lawyers	4 days	250 participants
IAJGS International Conference on Jewish Genealogy	6 days	940 participants	Red Bull Street Style World Finals 2018 International Tournament	2 days	1,500 participants



Warsaw according to the world-famous ICCA ranking (International Congress And Convention Association)



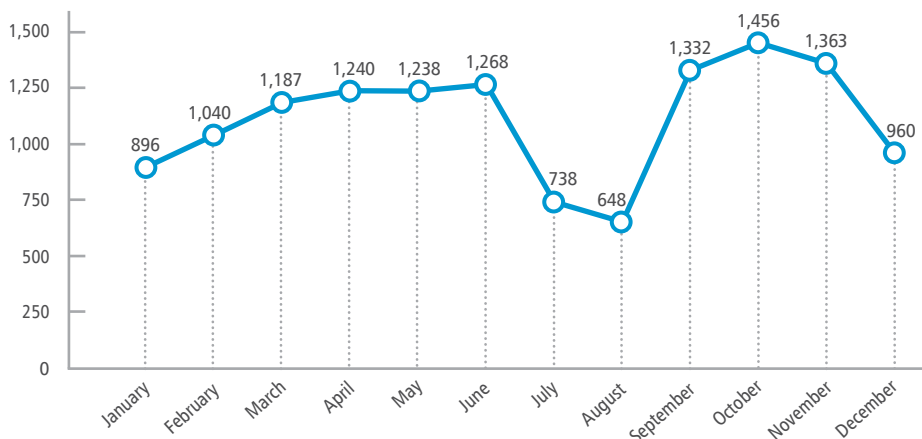
*meetings which take place on a regular basis, involve more than 50 participants and migrate between at least three countries

Source: 2, 3

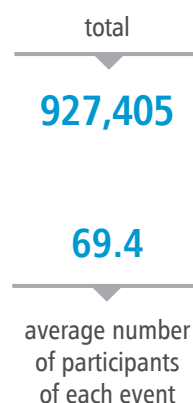
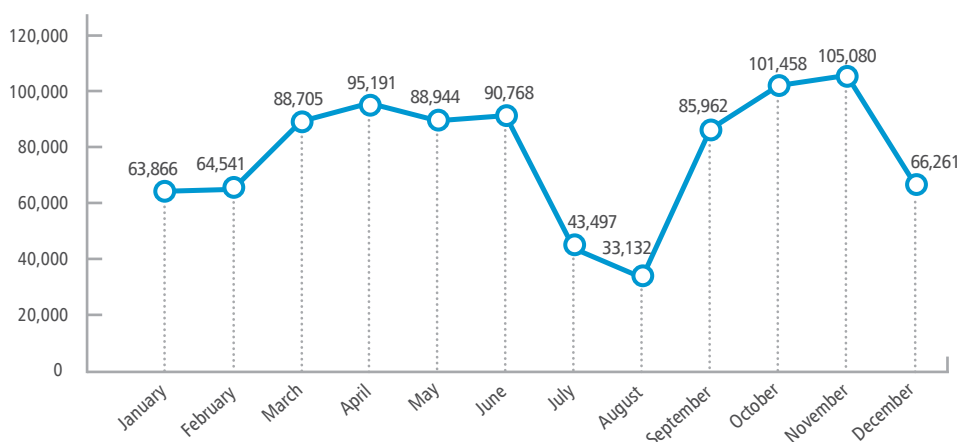
Warsaw conference market – size and characteristics

The diagrams presented below are based on data from the Demand Outlook system maintained by Z-Factor. Demand Outlook does not include all conference venues in Warsaw – it focuses primarily on hotel establishments whose potential and capabilities are of key significance to the conference and events market in Warsaw. These are mainly 5, 4, and 3-star hotels.

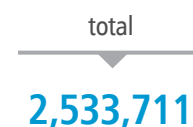
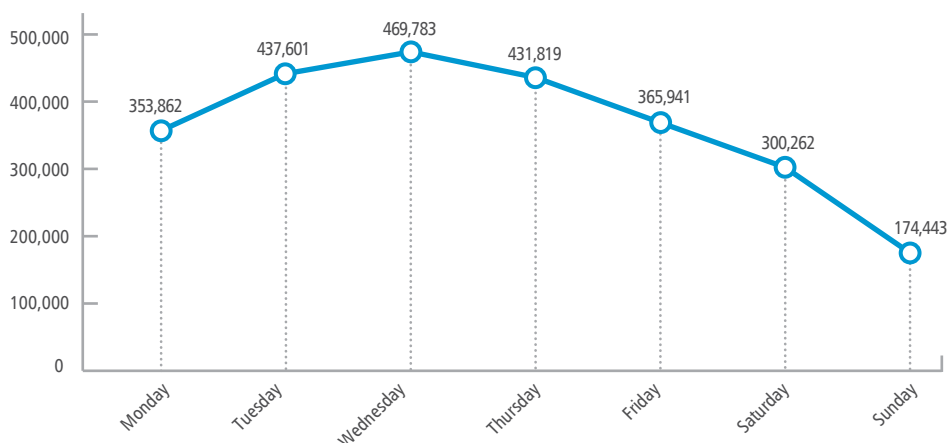
Number of events by month¹



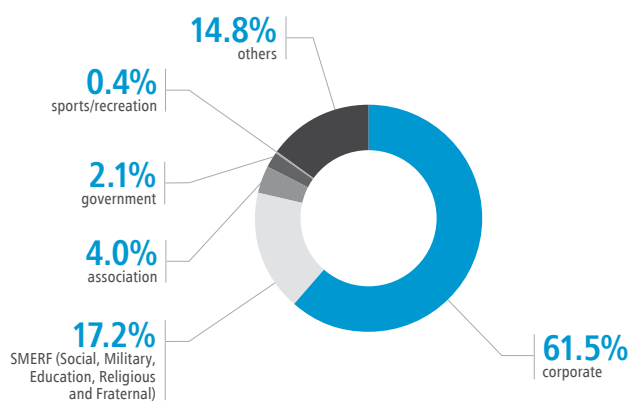
Number of participants of events by month¹



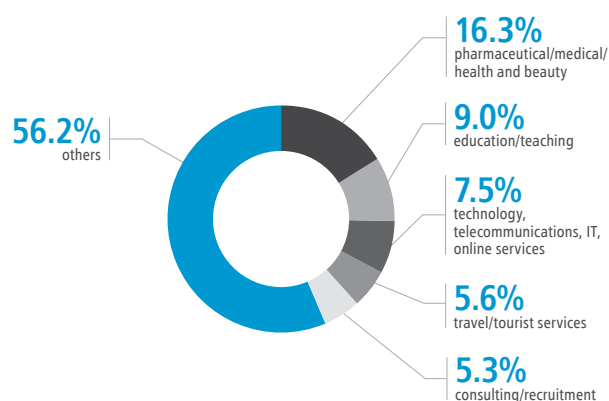
Space used by day of the week (m²)¹



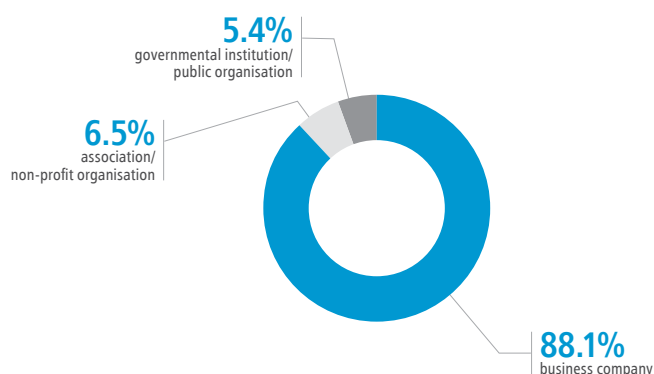
Events by market segment¹



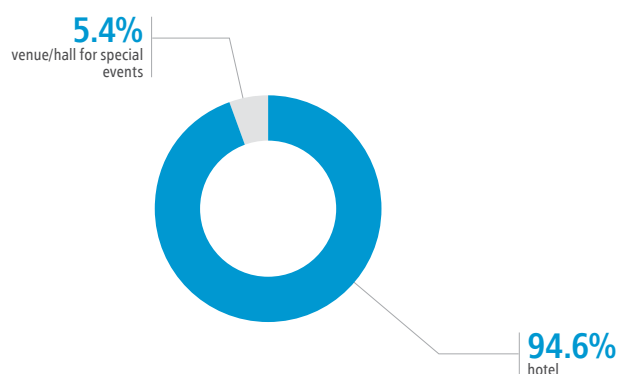
Events by industry¹



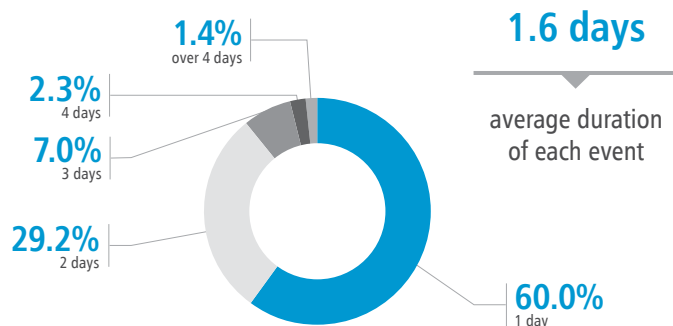
Events by type of organiser¹



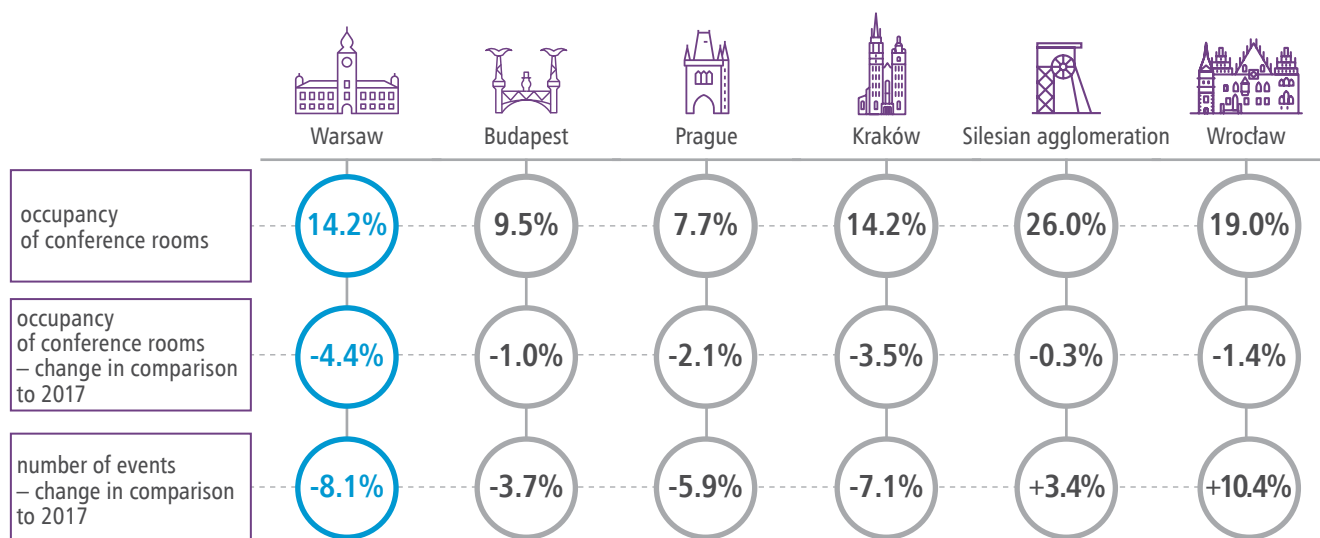
Events by venue type¹



Events by duration¹



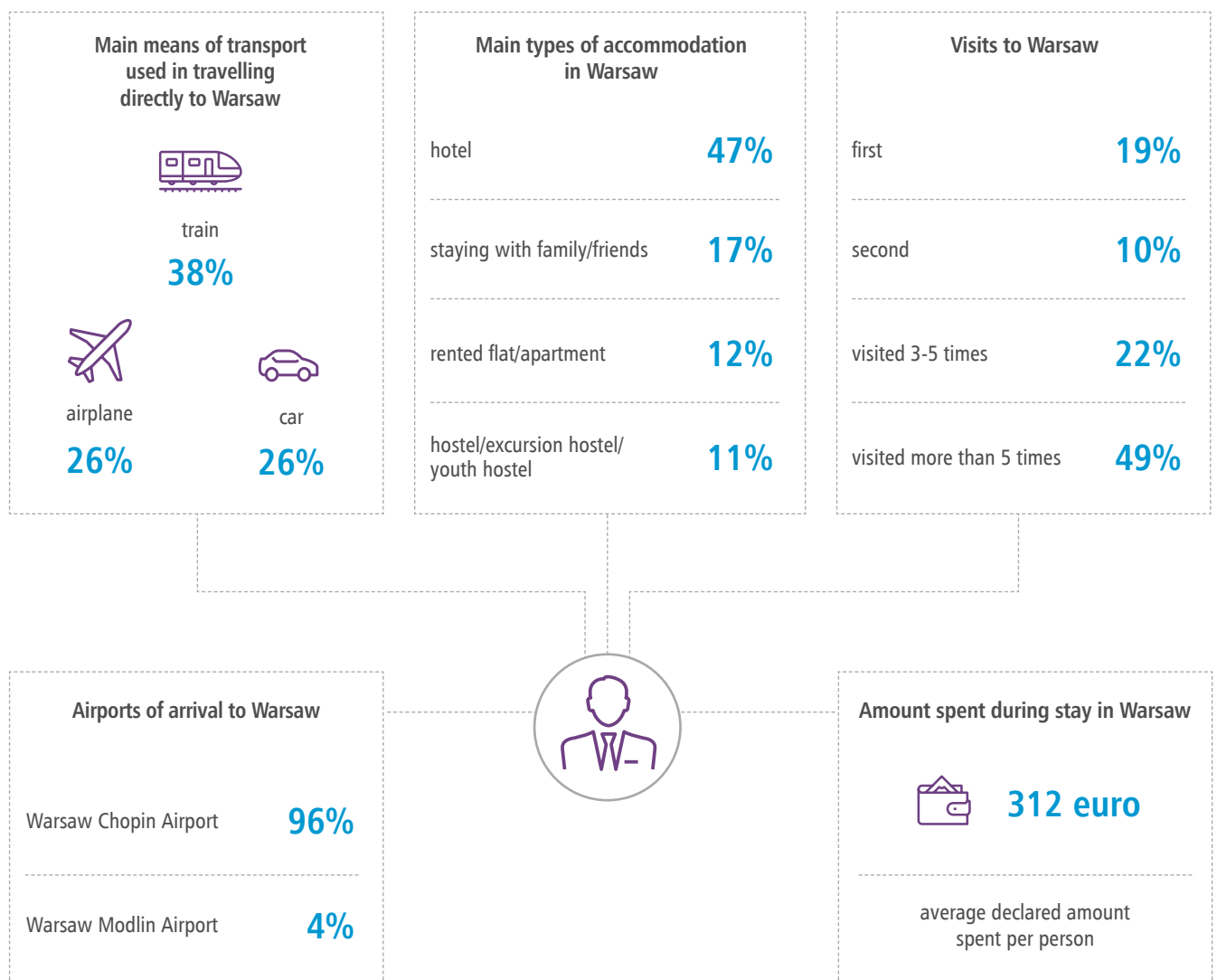
Occupancy of conference rooms and the number of events compared with selected cities⁴



Exhibition space of selected venues⁵

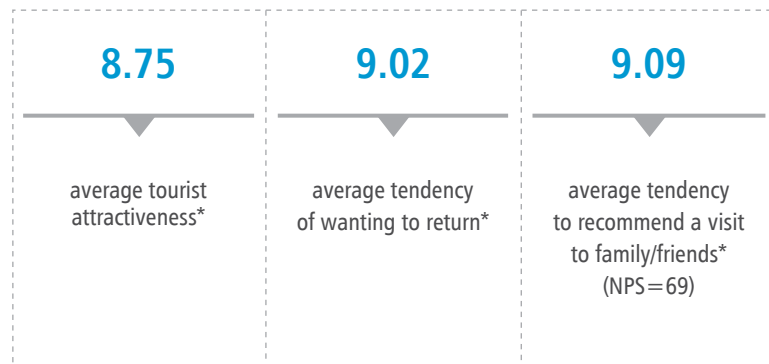


Tourist traffic characteristics – business tourists⁶





Warsaw according to tourists



*on a scale of 1 to 10

Source: 1

Amongst the significantly positive aspects of their stay, tourists most often list:



friendly people



interesting places and monuments

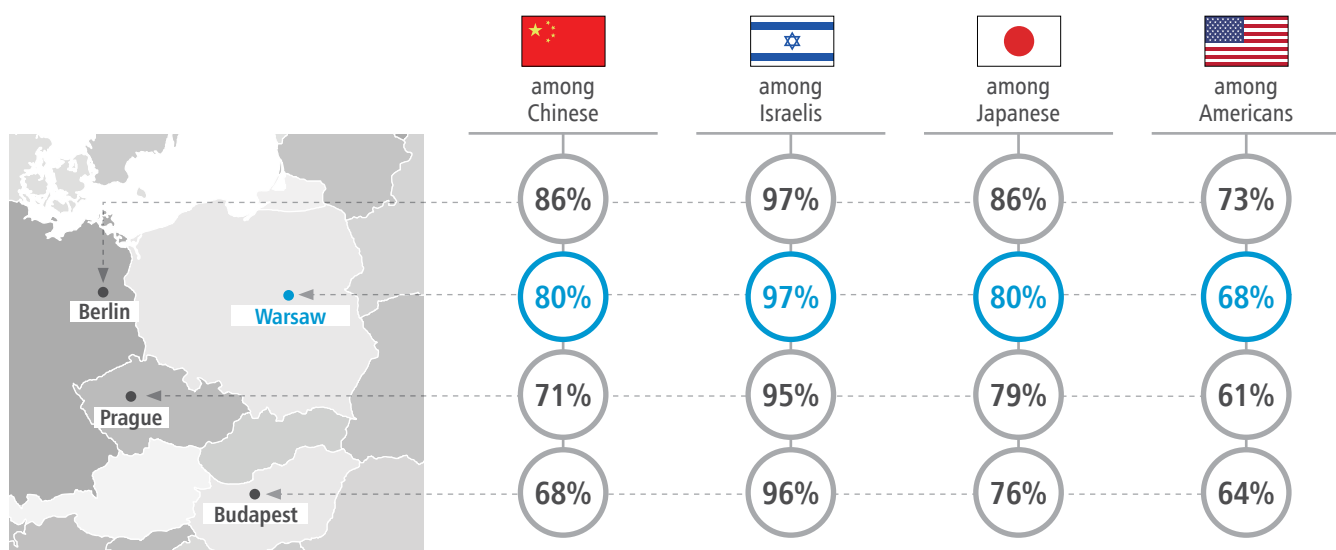


good transport

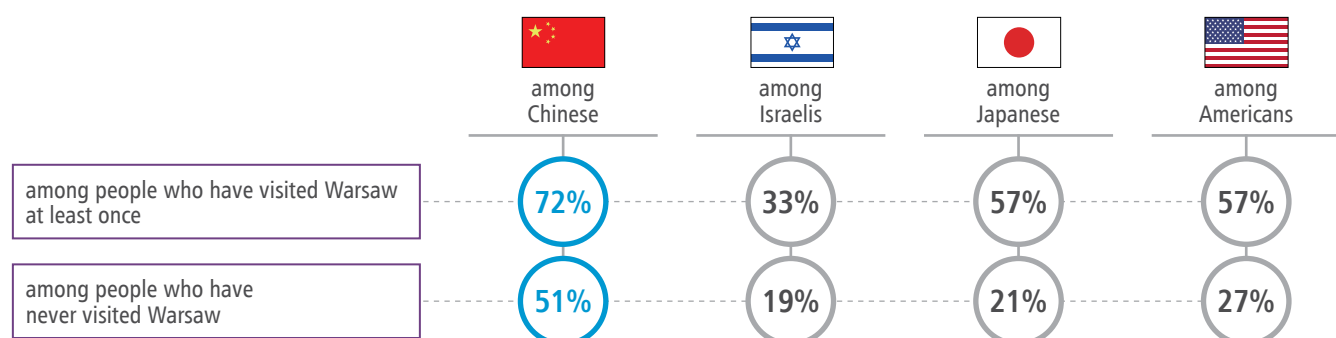
Source: 2

Warsaw's image among residents of the largest cities of China, Israel, Japan and the USA³

Knowledge of Warsaw compared with selected European cities

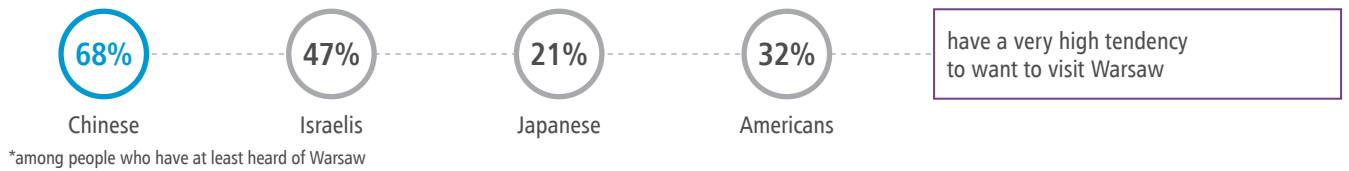


Positive impressions associated with Warsaw*

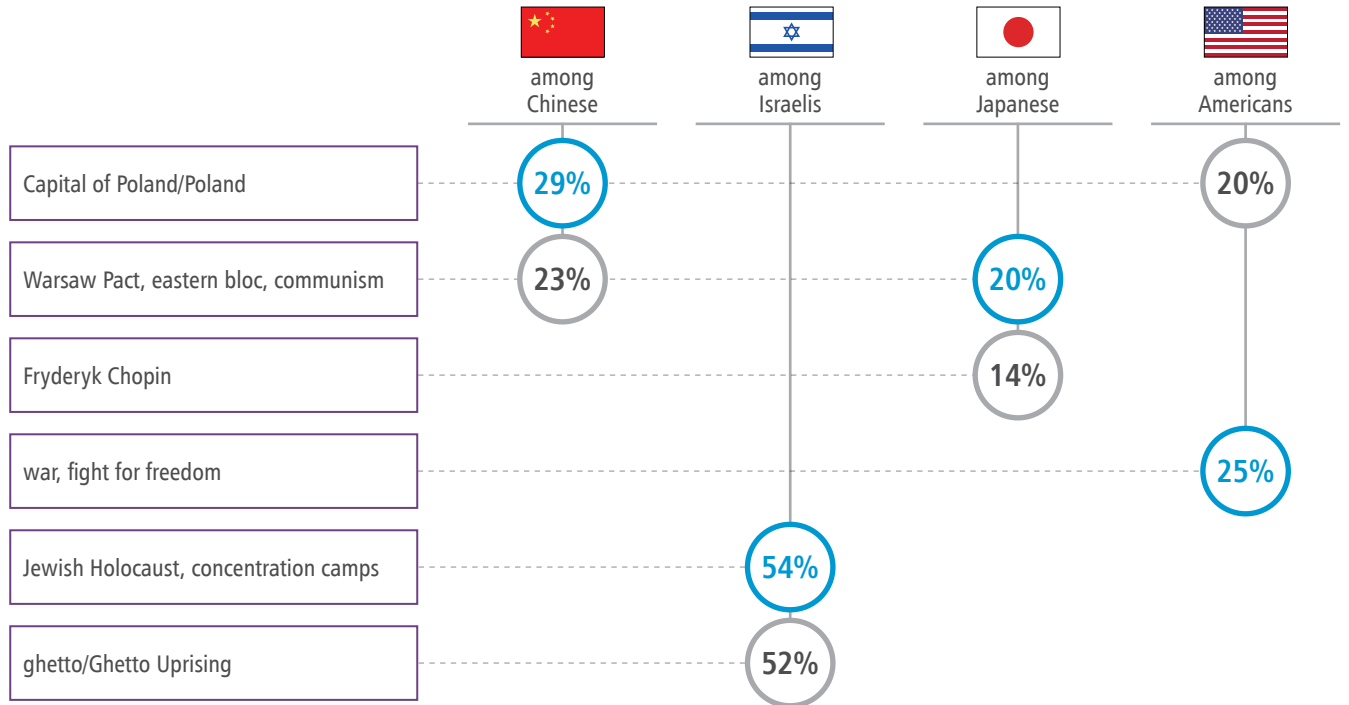


*among people who have at least heard of Warsaw

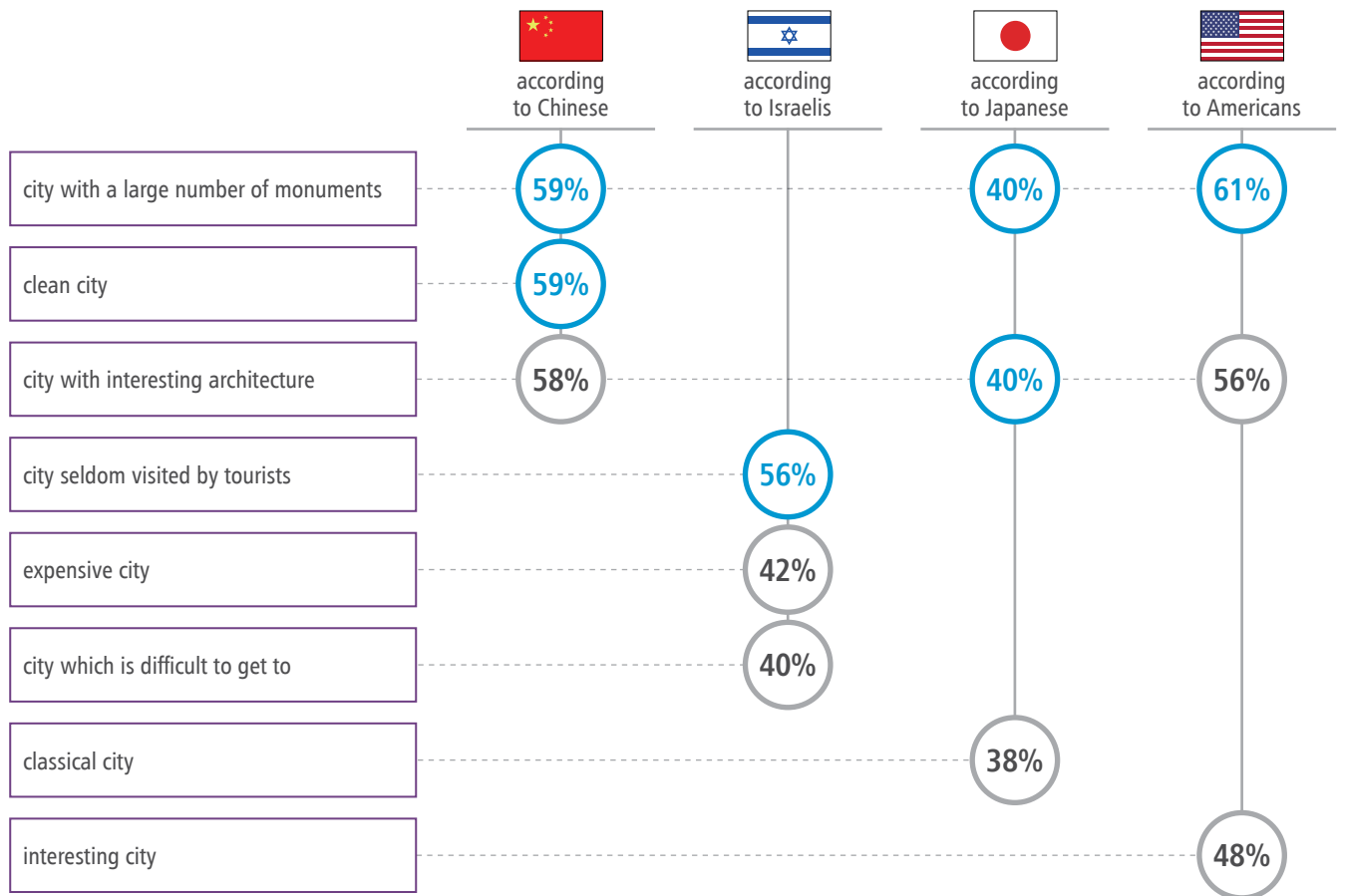
Tendency to want to visit Warsaw*



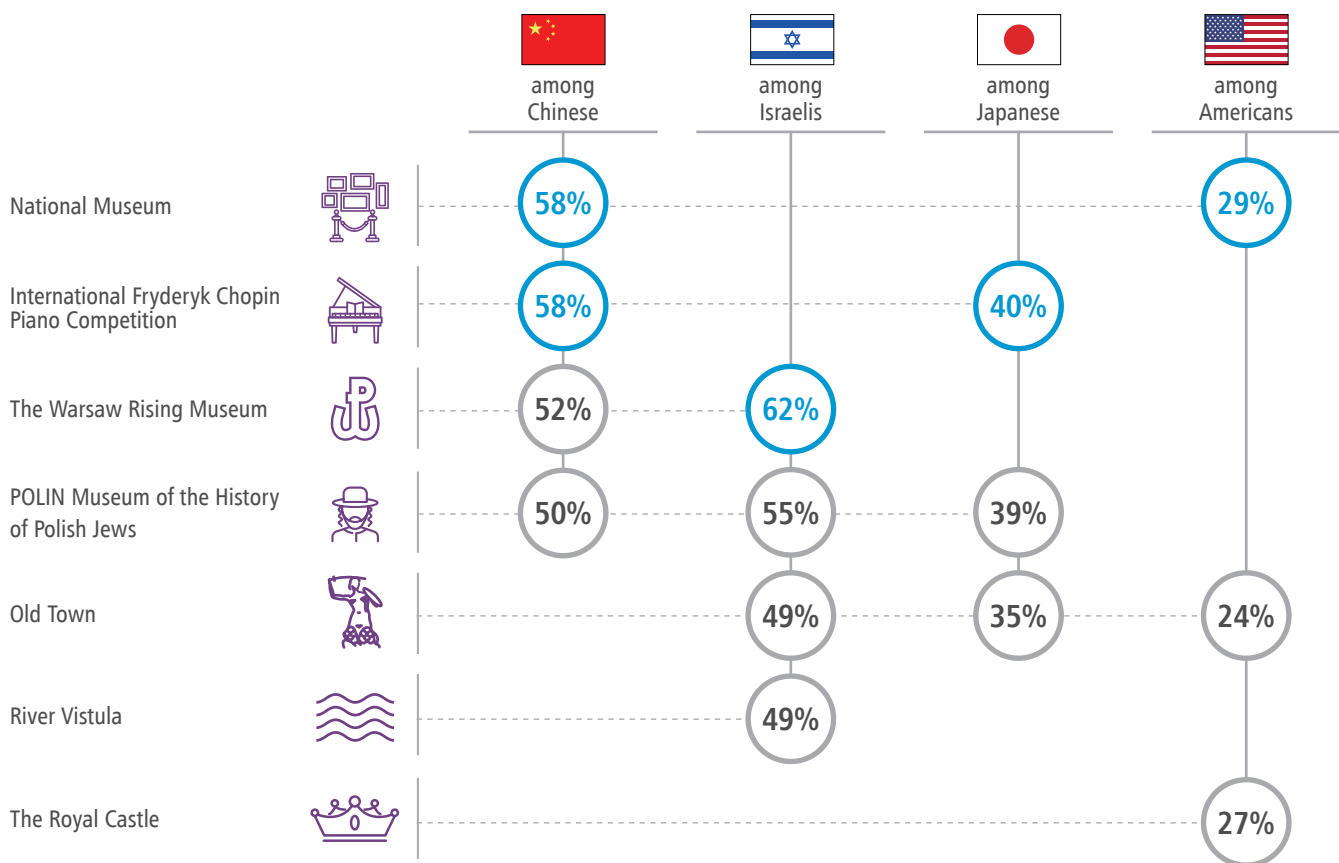
Main associations with Warsaw*



Main characteristics of Warsaw*

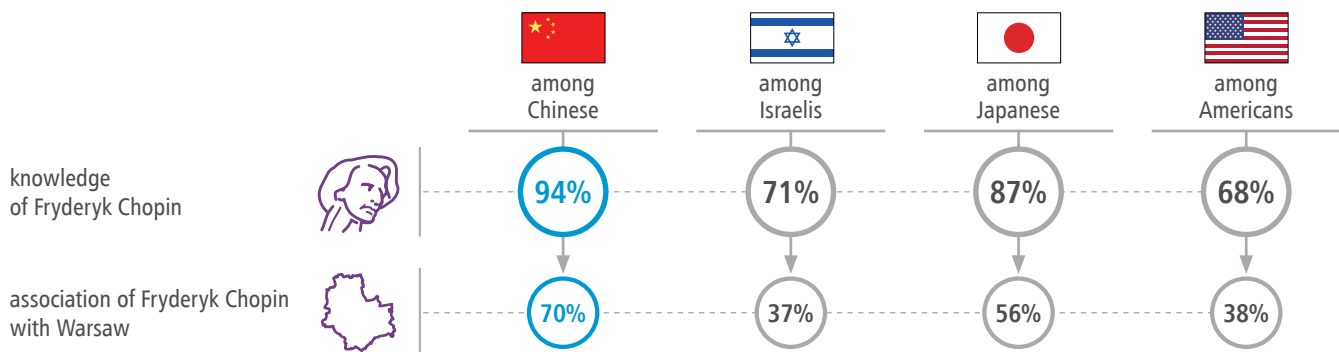


Most well-known Warsaw places, events and sights*



*among people who have at least heard of Warsaw

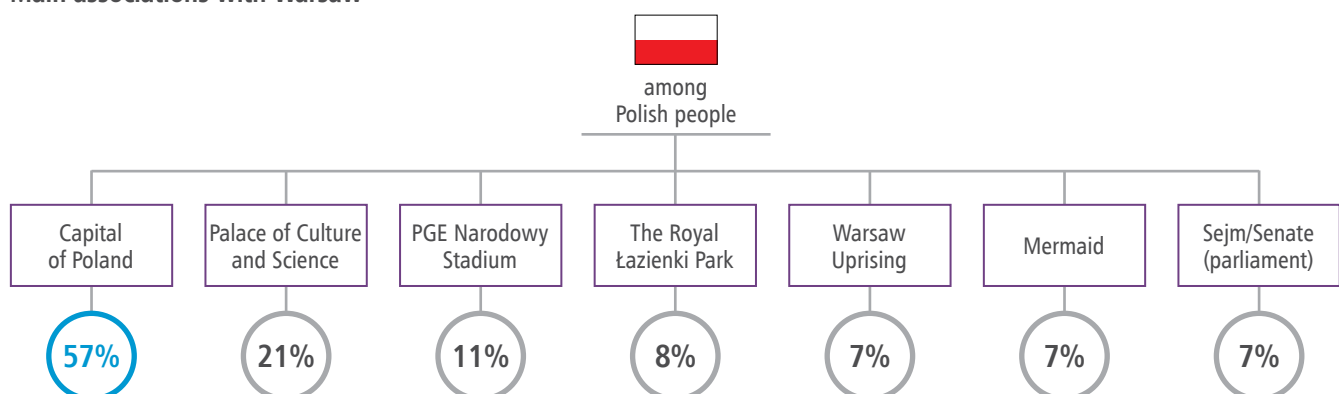
Recognisability of Fryderyk Chopin*



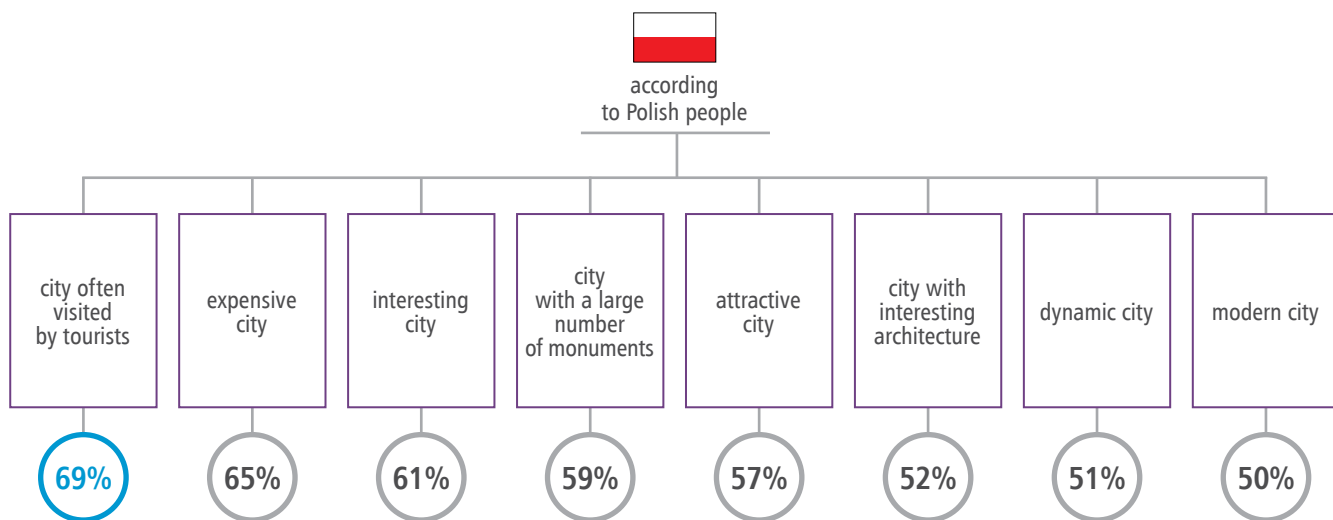
*among people who have at least heard of Warsaw

Warsaw's image among Polish people⁴

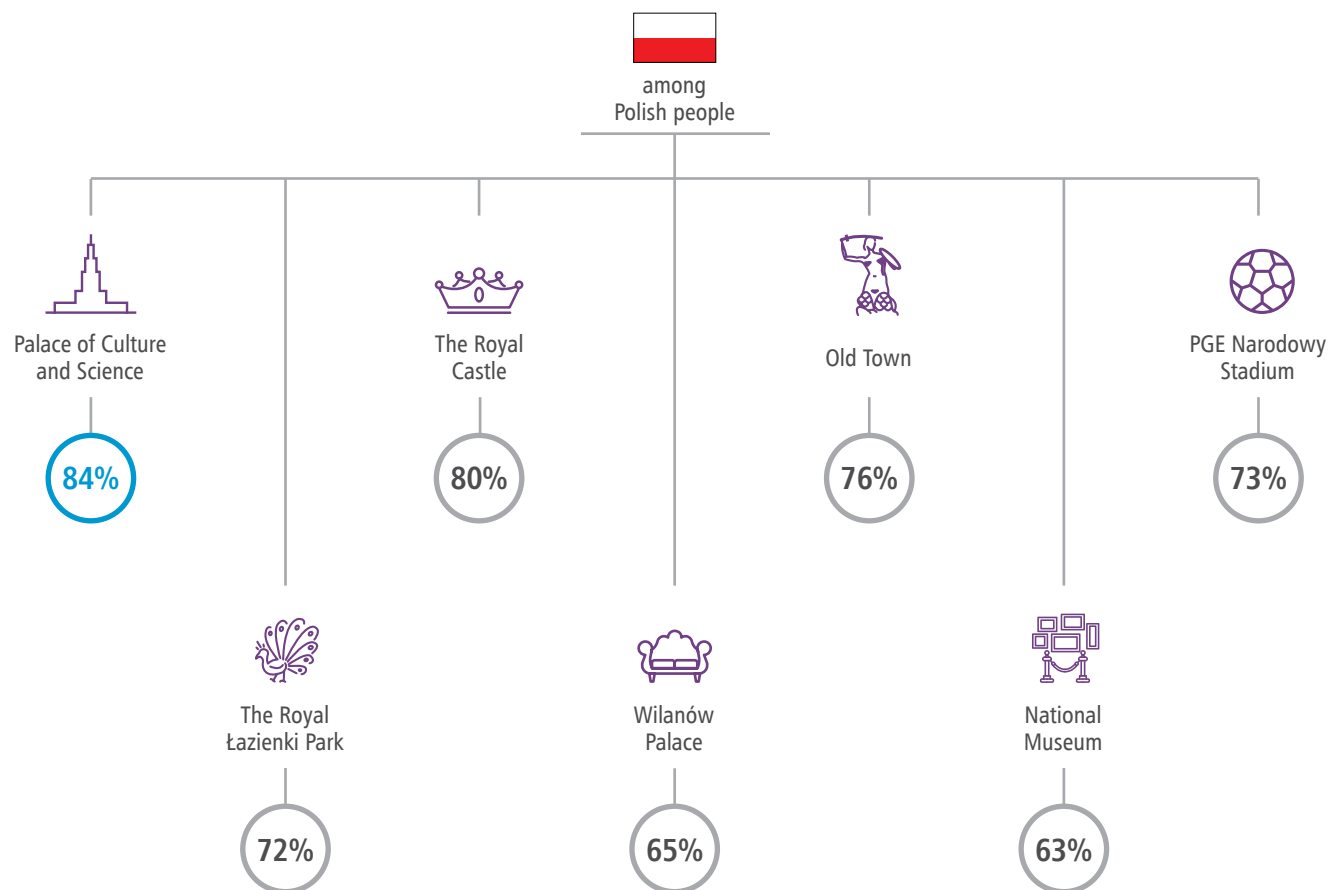
Main associations with Warsaw



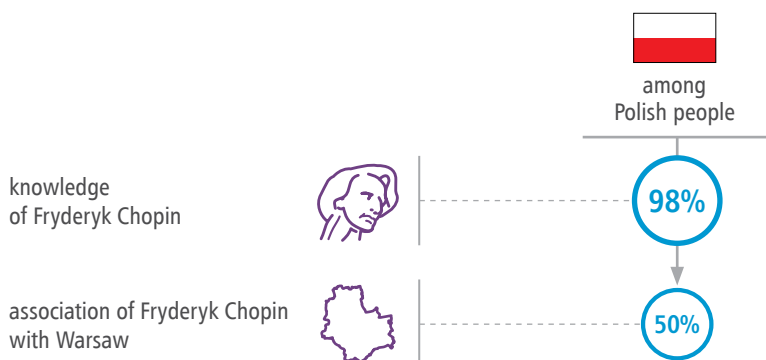
Main characteristics of Warsaw



Most well-known Warsaw places and sights



Recognisability of Fryderyk Chopin



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Photographs:

Introduction: photo Filip Kwiatkowski

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WARSAW TOURIST OFFICE
pl. Defilad 1, 00-901 Warszawa, Poland
Palace of Culture and Science, 10th floor
sekretariat@warsawtour.pl
www.warsawtour.pl