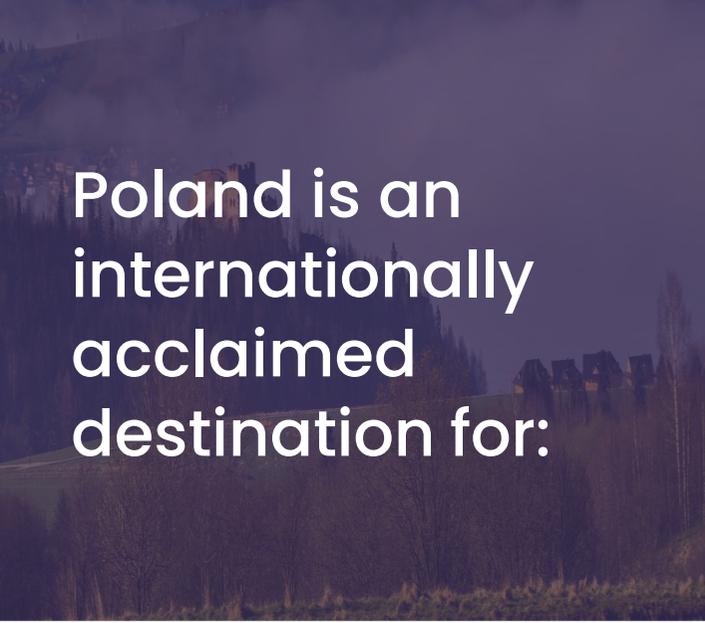




Polish Investment
& Trade Agency
PFR Group

THE TOURISM SECTOR

Poland. Business Forward



Poland is an internationally acclaimed destination for:



Pristine nature
A top 10 country to visit according to Lonely Planet



A place where East meets West
Dynamic business hub at the heart of Europe



Vibrant food scene
Warsaw among Top 10 Vegan-Friendly Cities in the World



Great cities
Wrocław – most business friendly medium – sized European city (2022)
Kraków – a TOP 25 Travellers’ Choice 2022
Łódź – in the „Best of the World 2022” List by National Geographic



Attractive place for expats
Young, increasingly international society, with a very high level of English proficiency



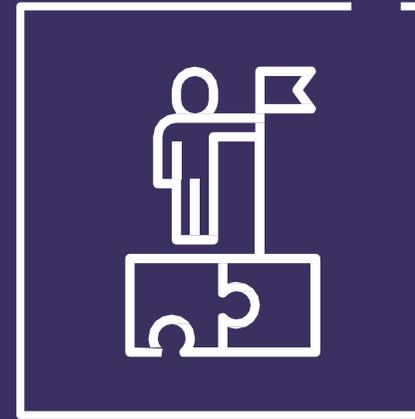
Rich history
Vast legacy of bravery and resilience



WHY
POLAND



FACTS ABOUT THE
POLISH TOURISM
SECTOR



WHAT MAKES
US DIFFERENT



DID YOU KNOW
THAT



SUPPORT
INSTITUTIONS



HOW WE CAN
HELP YOU

Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

Superb market share

40% of the region's total GDP and a gateway to the wider EU market

Large, high-quality talent pool

300k+ of well-educated graduates annually

Resilient economy

Max score for Macroeconomic Stability in the Global Competitiveness

Almost 30 years of continuous growth

Almost 10 years of stable growth in foreign trade turnover

Transparent

Regional leader in the Transparency International Corruption Index

FDI magnet

2nd in the EU, 5th in the world in terms of value of new greenfield projects (2020)

One third of all FDI stock in the region

Top-notch infrastructure

1st in CEE in Airport Connectivity & Quality of Road Infrastructure
(Global Competitiveness Report)

Ratings remain high despite the turbulent Times

Moody's: A2, S&P: A-, Fitch: A-, as of the first half of 2022

Competitive, well-developed cities

European Cities of the Future (fDi Intelligence)

Warsaw: 7th position (ahead of Berlin and Stockholm)

Kraków: 2nd in EU in Business Friendliness among Large Cities



FACTS ABOUT THE POLISH TOURISM SECTOR

Ranked **third** in the CEE Region in the 2021 edition of the prestigious Travel and Tourism Development Index

Global Ranking

1.	Czechia	26/117
2.	Estonia	29/117
3.	Poland	30/117
4.	Hungary	37/117
5.	Slovenia	39/117
6.	Bulgaria	41/117
7.	Lithuania	42/117
8.	Latvia	48/117
9.	Romania	53/117
10.	Slovakia	56/117

Tourism in Poland

9,722,000 foreign tourists (excluding daytrippers) visited Poland in 2021 and spent **15,470 mln PLN** during their stay.

	country	number of tourists
1.	Germany	3.63 million
2.	Ukraine	1.50 million
3.	Belarus	490 thousand
4.	Great Britain	389 thousand
5.	France	309 thousand

Domestic tourism

Domestic tourism is also popular:

Poles made over 46.3 mln trips last year, of which 19.6 mln were longer ones.

Sources:

The Travel & Tourism Development Index 2021 Rebuilding for a Sustainable and Resilient Future; May 2022;
Ministry of Economic Development, Labour and Technology data, published on 26.03.2021

WHAT MAKES US DIFFERENT

Modern, Smart Cities

Leading Polish metropolises can be found on the pages of prestigious Smart City rankings listed ahead of such popular destinations as Hanoi, Tokyo or Milan.

IESE Cities in Motion Index

Warszawa **62nd**

Wrocław **100nd**

MID Smart City Index

Warszawa **75th**

Wrocław **80th**

Even smaller cities have embraced technology with ease: similar to Wrocław, Bydgoszcz adopted an open payment system across public transport, while Gdańsk employed a variety of citizen-friendly solutions, including an integrated TRISTAR system, a city-wide GeoPlanning portal and a wide range of pro-environmental intelligent tools.

Discover Poland

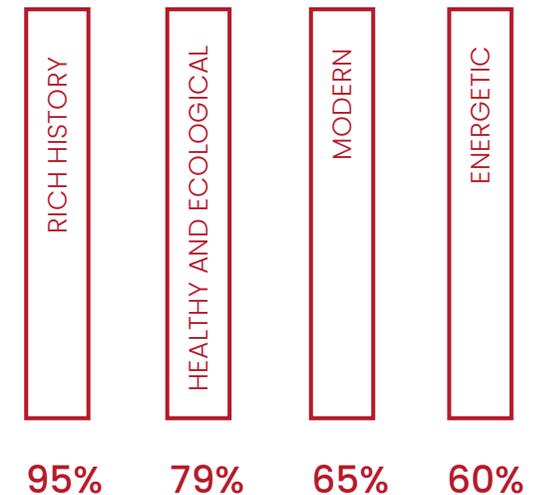
Poland boasts a total of 17 UNSECO sites (the largest number in the CEE region), including 15 UNESCO cultural sites as well as the unique primeval forest of Białowieża and the ancient and Primeval Beech Tree Forests of the Carpathians.

Sources:

GUS, *Tourism in 2021*, data for 2021; IESE *Cities in Motion Index*; IMD Smart City Index; Polish Tourism Organisation

How others see us

According to the Polish Tourism Organisation's annual survey, when asked about Polish tourist attractions most foreigners mentioned cities, forests and national parks, and heritage sites. Poland itself is viewed as rich in history and worth seeing (95%), energetic (79%), modern (65%), healthy and ecological (60%).



DID YOU KNOW THAT

Natural wonder

Poland has the **most geothermal underground water sources in Europe**, spread across 1/3 of the country.

Cultural Heritage

There are **939 museums in Poland**, including the award-winning POLIN Museum, the Second World-War Museum in Gdańsk, the Warsaw Uprising Museum and the Solidarity Museum. Poland is a great all-year round choice for active recreation, along with superb hospitality base:



Sources:

The solo Globetrotter: 45 Incredible Facts About Poland You Need To Know! & Energetykacieplna.pl; Statistics Poland: Activity of museums in 2021; Statistics Poland: Occupancy of tourist accommodation establishments in Poland in June and July 2020; Stasitics Poland, Occupancy of tourist accommodation establishments in 2020; Poland Events Impact 2020

SUPPORT INSTITUTIONS

Polish Tourism Organisation

The chief Government agency supporting legal entities involved in tourism.

- Has national stands at the largest tourism fairs held both in Poland and abroad
- cooperates with regional and local tourism organisations
- Organizes promotion events, seminars, training sessions
- Produces promotional publications about Poland



POLISH
TOURISM
ORGANISATION

Department of Tourism

in the Ministry of Economic Development and Technology – is responsible for the development of tourism at a Governmental level.

Modelled on its Western counterparts, the Polish support system for tourism offers help at three different levels:

- national in the form of the Polish Tourism Organisation
- regional in the form of Regional Tourist Organisations
- local in the form of Local Tourist Organisations



gov.pl

The Polish Investment and Trade Agency

The Polish Investment and Trade Agency's (PAIH) mission as a Government Agency is:

- To enable small- and medium-sized companies to reach their full potential in exporting their products and services around the world
- To support potential investors in Poland by providing comprehensive and up-to-date information services regarding legal and tax aspects, location and human capital, as well as on the available financial incentives
- To promote 'Poland as a Brand'

How we can help

PAIH's experienced team of experts with a hands-on approach and excellent understanding of the needs of entrepreneurs will ensure that your projects will move as fast and smooth as possible.



Information packs
macroeconomic, HR,
legal, sectoral data



**Analysis
of export
potential**



**Preparing
information
packs**



**Verifying
business
partners**



**Organising
business
missions**



**Preparing lists
of possible
business partners**



**Organising
B2B meetings**



**Support in contacts
with Government
Agencies**

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Polish Investment
& Trade Agency
PFR Group

Strategy and Business Promotion Department,
September, 2022



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