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A comparison of the tourism sector in Poland and the Czech Republic

Abstract. The aim of the article is to assess the condition of the tourism sector in Poland and in the Czech Republic. Statistical data from various institutions operating in the area of travel and tourism were compared. These statistics were supplemented with data contained in industry reports. In addition, official tourism statistics from both countries were also used. The analysis shows that the Polish tourism industry does not fully use its potential for development and performs worse than Western European countries. The Czech Republic, despite a smaller population, has a higher indicator of infrastructural equipment, which, given the country's geographical location, is the key determinant of the development potential of the tourism sector. The Polish tourism industry needs to continue investing in its infrastructure, which, given the country's geographical location and conditions for tourism, is one of the key factors that affect tourism and drive its development. Online promotion and advertising should also be intensified in order to reach potential tourists and show them the full range of tourism services. Poland and the Czech Republic are not generally perceived as very popular tourist destinations, so people's awareness of their attractiveness for tourism must be raised. The Internet is a particularly well-suited tool for this purpose, as it can, at a relatively low cost, show that countries like Poland and the Czech Republic can also provide services that satisfy the needs of various tourists.

Keywords: tourism sector, tourism multiplier, direct contribution of travel and tourism to GDP

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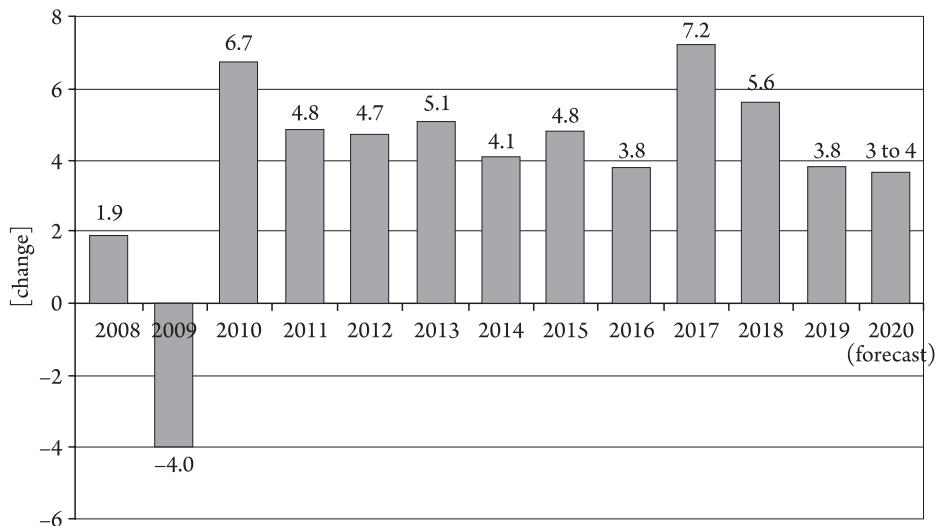
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1. Introduction

Tourism and related industries are of great importance in generating GDP in European countries, although their contribution is also significant elsewhere in the world [Gburova Matusikova, Benkova 2015]. According to a report by the World Travel and Tourism Council [WTTC 2019a], covering 185 countries, tourism in 2017 accounted for 10.4 percent of global GDP, provided employment for nearly 330 million people worldwide (9.9% of total employment) [*UNWTO World Tourism Barometer... 2020; Travel & Tourism Benchmarking Research Trends 2019*]. The travel and tourism sector in Europe has a similar share in supporting jobs for 33.5 million people with a 9.3% share in GDP creation, which exceeds EUR 1.6 trillion. At the same time, it is the fastest growing sector in the world and, as expected, its value in the European economy in 2025 is to amount to EUR 2.1 trillion creating almost a tenth of the European GDP with employment reaching 38 million people. The growth dynamics of the tourist services sector in the world remains at the level of approx. 4% annually [WTTC 2019c]. In addition, according to WTTC estimates, the travel and tourism sector will grow in the following years at an even rate, and often even faster than the total economy [*Governing National Tourism Policy 2020*]. In Poland, the tourism sector generates approx. 6% of the country's GDP with the involvement of over 700,000 people. It is therefore a very important sector in many countries, especially those affected by socio-economic crises, such as the one in 2007-08, and tourism may prove to be crucial in overcoming its effects [Kruczek, Mazanek 2019: 25-41]. However, in order to reap the benefits from tourism and enable its growth, a well-developed infrastructure is necessary. Countries with tourism facilities of poor quality and making inadequate or ineffective investments may expect weaker GDP contributions from this sector in the future and see fewer potential benefits in the area of employment. To maintain its growth and meet projected targets, the sector will require constant innovation. However, analyses contained in the WTTC Report [2019b] indicate that not all countries will take advantage of the emerging opportunities. The report lists Poland as one of the countries that have little chances of achieving the effects forecast for this sector regarding the value of its products or participation in employment. Poland ranks low in terms of global competitiveness because of its poor and limited infrastructure, which in turn is due to underinvestment.

The aim of the article is to compare the condition of the tourism sector in Poland with its counterpart in the Czech Republic. Statistical data from various institutions operating in the area of travel and tourism were compared, such as the Institute of Tourism, the World Travel and Tourism Council or the World Tourism Organization (UNWTO). The statistics were supplemented with data

Fig. 1. International Tourist Arrivals, World (% change)



Source: based on data from the World Tourism Organization, Yearbook of Tourism Statistics <https://data.worldbank.org/indicator/ST.INT.ARVL>; UNWTO World Tourism Barometer and Statistical Annex, January 2020.

from industry reports, such as Discover Central Europe, World Economic Forum (WEF). Official tourism statistics from both countries were also used, including those published by Statistics Poland, the Czech Statistical Office and the National Bank of Poland.

The global tourism sector is developing faster than that in Poland. The number of international arrivals, apart from a slight decrease in 2009 and 2020, grew faster than the entire global economy and in the last decade its annual growth rate fluctuated between 3.8 and 7.2 (Fig. 1).

2. A comparative approach to assessing attractions and capacity of the tourism sector

Although the climatic conditions for the development of tourism in Poland and the Czech Republic are not as favorable as those in southern European countries, both countries have many attractions that could be interesting for tourists [Panasiuk 2019: 13-25]. *The Discover Central Europe 2016. Facts & Figures report* [2017: 8-9] lists many tourist attractions that Poland can boast of, among them:

- 15 UNESCO sites, 4 of which are whole city complexes (Old towns of Warsaw, Cracow, Toruń, and Zamość);

- 426 castles – some of them are museums, and some have been converted into hotels and congress centres;
- 926 museums (private and public), many of which house interactive, modern exhibits;
- 23 national parks located in all parts of Poland and 108 protected landscape parks;
- the last primeval forest in Europe – Białowieski National Park (a UNESCO site);
- several animal and plant species which are extinct or rare elsewhere in the world;
- a diversity of landscapes: sea coastline, lake regions, lowlands, highlands, several mountain ranges;
- the biggest lake region (with over 1,000 lakes) in Europe after Finland, many rivers and canals, and a 700-km long sandy Baltic Sea coastline, which makes Poland a perfect destination for water sports enthusiasts, with plentiful opportunities for kayaking, yachting, kitesurfing, etc.;
- great conditions for active sport enthusiasts: 49,200 km of walking/hiking trails, 18,500 km of cycling routes, 1,100 km of kayaking routes, 400 km of skiing trails, and opportunities for fans of horse riding, golfing and alpinism, 70,000 km of tourist trails;
- over 240 SPA resorts in 40 health centres;
- 16 airports serving 25 airlines
- many large shopping centres, some of which are world award winners, located in each major city;
- trendy pubs and restaurants serving dishes representing cuisines from the whole world

- a long list of well-known international music festivals and cultural festivals.
- With respect to the Czech Republic, the report lists the following assets:
- it is the 6th safest destination out of 163 countries in the world;
 - 12 historical monuments included in the UNESCO Heritage List
 - 5 traditions (Slovácko Verbuňk, Shrovetide, Falconry, Kings' Ride, puppetry) listed by UNESCO as Intangible Cultural Heritage;
 - 6 UNESCO Biosphere Reserves;
 - over 200 castles, chateaux and monuments;
 - More than 40 protected historical towns;
 - 33 spas;
 - 104 golf courses;
 - 4 national parks and 26 protected landscape areas;
 - 12 mountain ranges higher than 1,000 metres;
 - 40,782 km of walking trails;
 - 44,000 km of cycling routes;

- 480 km of ski slopes;
- 3,540 km of cross-country ski trails;
- 1,800 km of horse riding routes.

The importance of these assets is reflected by figures showing the efficiency and tourist reception of both markets, which are presented in Table 1.

Tourist arrivals in collective accommodation establishments were almost twice as high in Poland as the number recorded in the Czech Republic in 2011 (Table 1). This advantage decreased to nearly 60% in 2016. However, the share

Table 1. Summary statistics

	2011	2012	2013	2014	2015	2016
Arrivals of tourists in collective accommodation establishments						
Poland						
Total	21,476,616	22,011,602	23,401,138	25,083,978	26,942,056	28,920,878
Domestic	17,067,066	17,032,308	18,158,166	19,613,643	1,252,486	22,812,679
International	4,409,550	4,979,294	5,242,972	5,470,335	5,689,570	6,108,199
Czech Republic						
Total	12,898,712	15,098,817	15,407,671	15,587,076	17,195,550	18,388,853
Domestic	6,183,645	7,451,773	7,555,806	7,491,191	8,488,637	9,067,413
International	6,715,067	7,647,044	7,851,865	8,095,885	8,706,913	9,321,448
Bednights of tourists in collective accommodation establishments						
Poland						
Total	57,148,253	62,014,890	62,959,452	66,579,589	71,234,421	76,763,269
Domestic	46,527,989	50,138,291	50,488,184	53,587,348	57,476,764	61,776,379
International	10,620,264	11,876,599	12,471,268	12,992,241	13,757,657	14,986,890
Czech Republic						
Total	38,235,088	43,278,457	43,308,279	42,946,929	47,093,906	49,696,957
Domestic	18,810,249	21,484,472	21,163,383	20,836,817	23,807,391	25,428,808
International	19,424,839	21,793,985	22,144,896	22,110,112	23,286,515	24,268,149
Average length of stay (in nights)						
Poland						
Total	2.66	2.82	2.70	2.65	2.64	2.65
Domestic	2.73	2.94	2.78	2.73	2.70	2.71
International	2.41	2.39	2.38	2.38	2.42	2.45
Czech Republic						
Total	2.96	2.87	2.81	2.83	2.76	2.70
Domestic	3.04	2.88	2.80	2.84	2.78	2.80
International	2.89	2.85	2.82	2.83	2.73	2.60

Source: based on data from Statistics Poland, the Czech Statistical Office and *Discover Central Europe 2015. Facts & Figures* [2016].

of international arrivals in total tourist arrivals in the Czech Republic remained at the level of about 50% throughout the period in question. By contrast, in Poland, international arrivals accounted for only a fifth of total arrivals.

The overall capacity of public accommodation establishments measured by the total number of units is comparable in Poland and the Czech Republic (Table 2). However, there are differences as regards the structure. Other hotels and boarding houses are the most numerous category in the Czech Republic, while in Poland they account for about a third of all units, while entities classified as "other" make up the largest share. Comparisons made for other categories, i.e. rooms and bed-places, reveal similar relations.

Table 2. Capacity of public accommodation establishments in 2015 and 2016

Category	Units		Rooms		Bed-places	
	2015	2016	2015	2016	2015	2016
Poland						
Total	10,024	10,509	146,114	151,236	710,274	749,191
5-star hotels	57	61	7,429	7,617	14,027	14,532
4-star hotels	321	349	32,311	34,365	65,094	69,198
Other hotels and boarding houses	3,345	3,555	106,374	109,254	222,434	228,751
Tourist campsites	132	135	n/a	n/a	20,161	23,405
Holiday dwellings and hostels	552	604	n/a	n/a	34,974	35,879
Other	5,617	5,805	n/a	n/a	353,584	377,426
Czech Republic						
Total	9,163	9,168	206,258	207,309	529,250	535,507
5-star hotels	58	60	6,417	6,693	12,561	13,146
4-star hotels	601	621	37,764	38,650	75,921	78,054
Other hotels and boarding houses	5,333	5,341	91,845	91,749	225,728	226,556
Tourist campsites	516	510	8,884	8,938	32,406	33,042
Holiday dwellings and hostels	995	1,013	17,983	18,110	63,110	63,902
Other	1,660	1,623	43,365	43,169	119,524	118,807

Source: based on data from Statistics Poland, Tourism in 2018; *Turystyka w Unii Europejskiej – dane za 2018 r.* and *Discover Central Europe 2015. Facts & Figures* [2016].

Table 3. International tourism receipts and expenditure 2011-2016

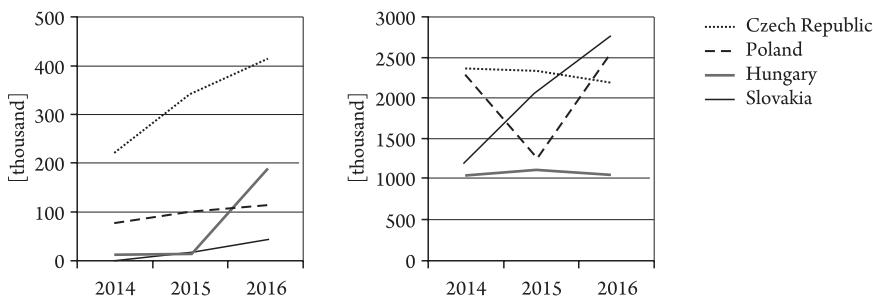
Receipts and expenditure	Country	2011	2012	2013	2014	2015	2016
Receipts (million EUR)	Poland	7,647	9,600	9,400	10,800	12,900	13,200
	Czech Republic	5,299	5,397	5,096	5,242	5,501	5,149
Expenditure (million EUR)	Poland	6,058	5,100	6,544	6,700	7,200	7,200
	Czech Republic	3,120	3,238	3,356	3,946	4,426	3,876
Balance (million EUR)	Poland	3,272	4,500	2,856	4,100	5,700	6,000
	Czech Republic	2,179	2,159	1,741	1,769	1,274	1,273
Direct Contribution of T&T to GDP in %	Poland	2.2	2.3	n/a	n/a	n/a	n/a
	Czech Republic	2.7	2.7	2.9	2.8	2.8	2.5

Source: based on data from the Institute of Tourism, Warsaw; National Bank of Poland; UNWTO.

In terms of international receipts and expenditure, in the reference period the Polish tourism industry did slightly better than its Czech counterpart (Table 3). In the period 2011-2016, Poland saw a gradual increase in revenues and expenditures. However, the overall change in revenues was much higher than in expenditures (by nearly 73% and by less than 19%, respectively). In the Czech Republic, revenues in the subsequent years fluctuated but remained above EUR 5000 million. The largest increase relative to 2011 was recorded in 2015 and amounted to less than 4%. Compared to 2011, revenues in 2016 were lower by 3%, while expenditures grew by over 24% (the growth rate in 2015 relative to 2011 was 42%). This is reflected by the balance of revenues and expenditures (in nominal values), which in 2016 was five times higher in Poland than in the Czech Republic. By contrast, in 2011 the balance for Poland was bigger only by 50%. In the following years the difference continued to grow.

Realizing the development potential of the tourism sector, the four members of the Visegrad Group have created a joint initiative to promote tourism in their respective countries. Despite the awareness of the growing role of tourism, it does not receive enough support, which results in a relatively low interest on the part of foreign tourists. According to World Economy Forum experts who prepare the biannual Travel & Tourism Competitiveness Report, Poland ranked 42nd out of 140 countries evaluated in its last edition, while the Czech Republic came in 38th place [*The Travel & Tourism Competitiveness Report 2019*: 13]. Countries with attractive natural resources have a clear competitive advantage as tourist destinations. At the same time, there is little a country can do in this respect, since this kind of attractiveness results from the country's location, climate, abundance of

Fig. 2. Number of Facebook fans and website visitors in V4 countries in 2014-2016



Source: based on data from *Discover Central Europe*, 2014, 2015, 2016.

UNESCO World Heritage sites, fauna and flora, wealth, etc. In terms of these components, Poland and the Czech Republic are somewhere in the middle of the ranking of European and Eurasian countries. Therefore, there is an urgent need to focus on and develop other factors of attractiveness for tourists. Unfortunately, apart from statistics indicating the effects of promoting Poland abroad, as evidenced by the number of tourists, little is done to generate interest in such an important medium as the Internet is today [Muhocho-Minni, Lubbe 2017: 58-79]. Figure 2 shows differences between V4 countries in the number of fans registered on each country's official Facebook tourism profiles and the number of people visiting websites of national tourism organisations. Relative to its population, the results for Poland are rather poor, with a slight trend of improvement.

3. Direct, indirect and induced benefits and the tourism multiplier effect

Economic impacts of tourism are important for:

- state, regional, local and community planning,
- social-economic development (policy making),
- marketing and management decisions [Kryczka 2019: 43-61].

That is why it is important to make local communities aware of the importance of tourism in stimulating economic activity and the socio-economic development of the region. Attention should also be paid to multiplier effects generated by tourism [Gasparino et al. 2008]. They can be direct, indirect and induced. The first category refers to initial expenses made by tourists in specific areas directly related to the tourism industry (lodging, restaurants, amusements, retail trade, transportation). Part of the revenues generated in this way is used to stimu-

late an indirect demand for goods and services in other industries. The remaining part will be spent to purchase production factors (labour force, land and capital), will flow to the central and local budgets in the form of taxes, or will be retained to increase future consumption (savings). Even if some of the earned profits find their way to entities outside the local economy, some of them will remain and will improve the well-being of the local community, generating new jobs in the tourism industry, stimulating wage increases to attract potential of tourism.

In addition, a growth in employment causes an increase in the total income of local inhabitants. Some of this income is saved, and some is spent on the consumption of goods. "This in turn generates additional demand, which, as before, translates into additional production and employment" and the process repeats. This is the mechanism of induced effects. Indirect and induced effects are also called secondary effects [Gasparino et al. 2008: 3]. The three kinds of effects of tourism are illustrated in Fig. 3.

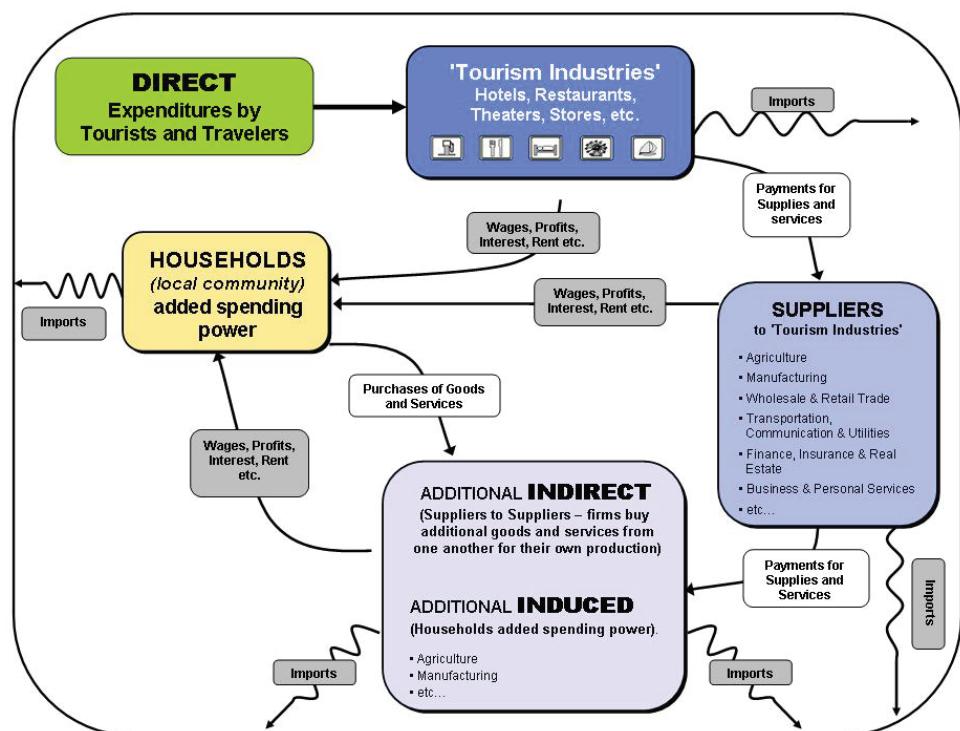


Fig. 3. Direct, indirect and induced benefits and effects on the economy triggered by tourist spending

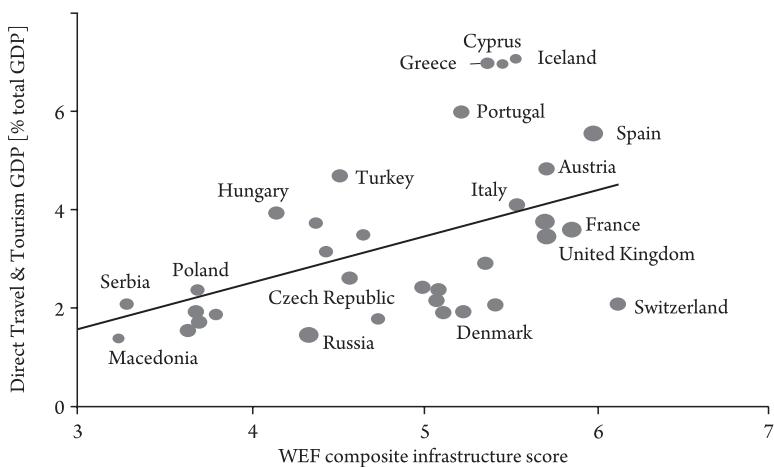
Source: Gasparino et al. [2008: 4].

As estimated by Ewa Bąk-Filipek, Sharon C. Cobb and Katarzyna Podhorodecka [2019: 13-20], the tourism industry in Europe generated 3.8% of GDP in 2010-2018, and after accounting for multiplier effects, 8.8%, or even as much as 10%, if induced effects are included in the calculations. Given the impact of the tourism industry on the economy, it makes sense to use a wide range of instruments that foster the development of this sector, as potential benefits will be increased thanks to multiplier effects. It should also be remembered that the tourist industry is very sensitive to various types of threats, economic [Panasiuk 2019: 13-25] and cultural crises, warfare or epidemics.

Tourist activity would be not possible, or at least would be very limited, without the support of a broadly understood infrastructure. There is therefore a strong relationship between the quality and efficiency of the country's tourism infrastructure and the success of its travel and tourism sector, as measured by its economic contribution [Panasiuk 2007: 212-215]. Figure 4 shows how this relationship looks for different Eastern European countries, based on the results of the WEF analysis contained in the Travel and Tourism Competitiveness Report and WTTC estimates of the tourism sector's direct contribution to GDP.

Figure 4 shows the line of best fit between the country's infrastructure score and the size of direct GDP contributions from the tourism sector. One can see, for example, a large dependence of the Spanish economy on the tourism indus-

Fig. 4. The relationship between WEF composite Travel & Tourism infrastructure score and the sector's direct contribution to GDP in 2014

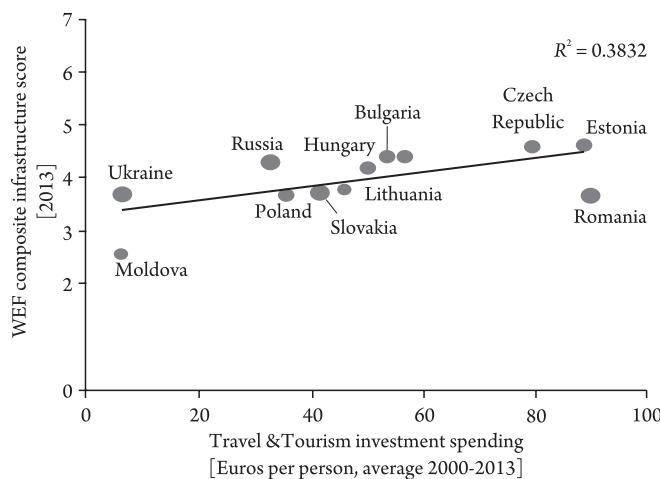


Note: Albania, Croatia, Malta and Montenegro are excluded from thi analysis due to their distorting effect. These nations benefit from exceptionally hihg direct. Travel and Tourism contribution despite having relatived poor infrastructure.

Source: WTTC 2015: 15.

try (5.6% of the country's GDP compared to the European average of 3.4%) and the high composite infrastructure score (6 points out of 7). The Czech Republic scored 4.6 points for its tourism infrastructure, but the tourism sector contributed only 2.6% to the country's GDP. The results of the Polish economy (3.7%) were less than average. Despite certain improvements in the area of aviation infrastructure, indicated in *The Travel & Tourism Competitiveness Report* [2019], Poland still lags behind the Czech Republic in the area of ground & port infrastructure and tourist service infrastructure. It should be noted, however, that improvements in the quality of the infrastructure will not automatically become a stimulus for tourism, which is also affected by other factors, such as climate, architecture or tourist attractions. As noted in the WTTC Report [2015], it does not make sense for Switzerland to improve its already good infrastructure to compete with Spain, which has an obvious advantage in terms of the natural climate. For this reason, Switzerland relies on industries that are not dependent on the weather. Although the relationship between infrastructural improvements and direct contributions of the tourism sector to GDP is not always straightforward, in countries such as Poland and the Czech Republic, there is still a lot that can be gained in this respect from improving the relatively poor infrastructure. This can only be achieved through adequate investment. However, as can be seen in Figure 5, the correlation between average investments in the tourism industry in Eastern European countries in 2000-2013 (measured per foreign guest and domestic resident) and their WEF composite infrastructure scores was rather weak ($R^2 = 0.3832$). By contrast,

Fig. 5. The relationship between average per capita investment in Travel & Tourism and WEF composite Travel & Tourism infrastructure score in Eastern Europe



Source: WTTC 2015: 16.

the corresponding correlation coefficient for countries of Southern Europe was much higher ($R^2 = 0.7313$). So while the effectiveness of tourism spending in Poland and the Czech Republic is not as high as one could wish for, infrastructural investments are certainly worth continuing and should be increased, especially in the case of Poland, where the average per capita spending in the reference period was approximately half of the amount spent in the Czech Republic.

4. Summary

It can therefore be concluded that Poland has still not fully taken advantage of the development potential hidden in the tourist industry. The Polish tourism sector performs worse not only in relation to Western European countries, but also when it is compared to countries of the Visegrad Group, which are at a similar stage of economic development. This indicates an inadequate use of opportunities inherent in the tourism sector. Despite having fewer natural and cultural assets than other European countries, Poland and the Czech Republic can still present themselves as attractive destinations if they intensify their online promotion efforts to reach potential tourists and show them the full range of their offering. Poland and the Czech Republic are not generally perceived as very popular tourist destinations, so people's awareness of their attractiveness for tourism must be raised. The Internet is a particularly well-suited tool for this purpose, as it can, at a relatively low cost, show that countries like Poland and the Czech Republic can also provide services that satisfy the needs of various tourists. The infrastructure is another important and indispensable factor in the development of tourism that the Polish and Czech economy could improve. As shown in the article, Poland in particular needs to intensify its activities in this area. The Czech Republic, despite a smaller population, has a higher indicator of infrastructural equipment, which, given the country's geographical location, is the key determinant of the development potential of the tourism sector. The analysis of the tourism sector in both countries indicates that in 2011-2016 Poland had a positive balance of international tourism revenues and expenditures with an upward trend. However, the Polish tourism industry needs further infrastructural investments to achieve its full potential.

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Sektor turystyczny w Polsce i Czechach w ujęciu komparatywnym

Streszczenie. Celem artykułu jest ocena kondycji sektora turystyki w Polsce i Czechach. Do porównania wykorzystano dane statystyczne różnych instytucji działających w obszarze Travel&Tourism. Statystykę uzupełniono danymi pochodzącyymi z raportów analizujących branżę turystyczną. Posilkowano się także danymi zaczerpniętymi ze statystyki publicznej. Przeprowadzona analiza wskazuje, że Polska nie wykorzystuje potencjału rozwojowego, jaki tkwi w branży turystycznej i osiąga gorsze wyniki w ujęciu komparatywnym nie tylko w odniesieniu do krajów Europy Zachodniej. Czechy, mimo mniejszej liczebnie populacji, mają wyższy wskaźnik wyposażenia w infrastrukturę, która jest kluczową determinantą rozwoju sektorów turystycznych. Polska potrzebuje kolejnych inwestycji w infrastrukturę, która przy danych uwarunkowaniach w tej szerokości geograficznej i przy danych warunkach dla funkcjonowania turystyki (atrakcje, klimat) jest jednym z kluczowych czynników kształtujących turystykę i generujących jej rozwój. Należy również zintensyfikować promocję w rzeczywistości wirtualnej, aby dotrzeć do potencjalnych turystów i wskazać im pełen wachlarz możliwości. W ogólnej świadomości Polska i Czechy nie są kojarzone z wiodącymi kierunkami wyjazdów turystycznych, zatem tę świadomość trzeba ukształtować na nowo. Internet jest do tego narzędziem odpowiednim. Dzięki niemu można pokazać, relatywnie niskim kosztem, że takie kraje jak Polska i Czechy również mogą dostarczyć dóbr i usług poszukiwanych przez turystów i stać się miejscem zaspokajania potrzeb turystycznych.

Słowa kluczowe: sektor turystyczny, mnożnik turystyczny, wkład turystyki w PKB



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