

Krzysztof Łopaciński
Szkoła Główna Turystyki i Rekreacji w Warszawie

CONDITIONS OF TOURISM DEVELOPMENT IN LARGE CITIES IN POLAND

Summary

For years, the Institute of Tourism at the Warsaw School of Tourism and Hospitality Management has gathered data describing the tourism sector and the industries supporting or determining the development of tourism in Poland's largest cities. The surveys discussed took account of tourism development in Gdansk, Cracow, Lodz, Poznan, Szczecin, Warsaw, and Wroclaw between 2001 and 2015. In 2001-2015, the number of bed places in the cities in question increased by 51.9%, whereas their share in the total number of bed places in Poland went up from 9.8% to 16.3%.

Between 2001 and 2012, the Institute of Tourism in Warsaw systematically estimated inbound traffic in the selected seven cities in Poland. During the eleven years covered, the developments observed in particular cities varied widely. The number of foreign tourists more than tripled in the cities of western Poland (Wroclaw and Szczecin). The growth in the number of visitors to the two cities mostly resulted from greater interest on the part of German residents and markedly improved accommodation establishments. Ranked 3rd and 4th, Gdansk and Cracow experienced a more than twofold increase in the number of foreign tourists. The reasons included both greater interest in the two cities and improved transport connections (in particular air transport connections).

A very abrupt fall in the number of foreign tourists in Warsaw stemmed from increased interest in visiting other cities, but primarily from a decline in the number of visitors from Belarus, Russia and Ukraine related to the introduction of visas.

Key words: tourist traffic, urban tourism, conditions of tourism development.

JEL codes: Z31

Introduction

For years, the Institute of Tourism at the Warsaw School of Tourism and Hospitality Management has gathered data describing the tourism sector and the industries supporting or determining the development of tourism in Poland's

largest cities. The surveys discussed took account of tourism development in Gdańsk, Cracow, Łódź, Poznań, Szczecin, Warsaw and Wrocław between 2001 and 2015. In some of the years of the period covered, the list of cities was extended but data gathered for the other cities did not allow to draw conclusions for the whole period under examination.

The analyses were based on changes in the size and composition of tourist traffic in the selected cities in the context of tourist traffic trends in Poland.

Equally important factors allowing comparisons were changes in the number of bed places and changes in the number and structure of guests at the accommodation establishments of the selected cities.

The statistics gathered supplemented with data for 2015 served to formulate and present the main information on and conditions for the development of tourism in the selected cities in the 15-year period covered. The presentation of the results includes a number of figures and tables showing spatial characteristics of the variables discussed.

Methodological assumptions. Data sources used

The main sources of information contained in the article are the reports of the Institute of Tourism entitled *Turystyka polska. Wielkie miasta* ('Tourism in Poland. Big cities') commissioned by the local authorities of the selected cities in the years 2001 to 2012. The supplementary information for 2013–2015 is based on data gathered by the Central Statistical Office (GUS) at the Local Data Bank and on estimates of the Institute of Tourism concerning the number of domestic and foreign visitors to individual cities.

For the sake of the comparability of data on the number of bed places in 2001 and 2015, in 2015 the total number of bed places was limited to those at collective accommodation establishments without private or rural tourism accommodation, excluded from the 2001 statistics.

The conditions of tourism development in the selected cities were analysed on the basis of the gathered time series and of time series presenting other economic phenomena relevant to the tourism economy.

Bed places and tourist traffic at accommodation establishments

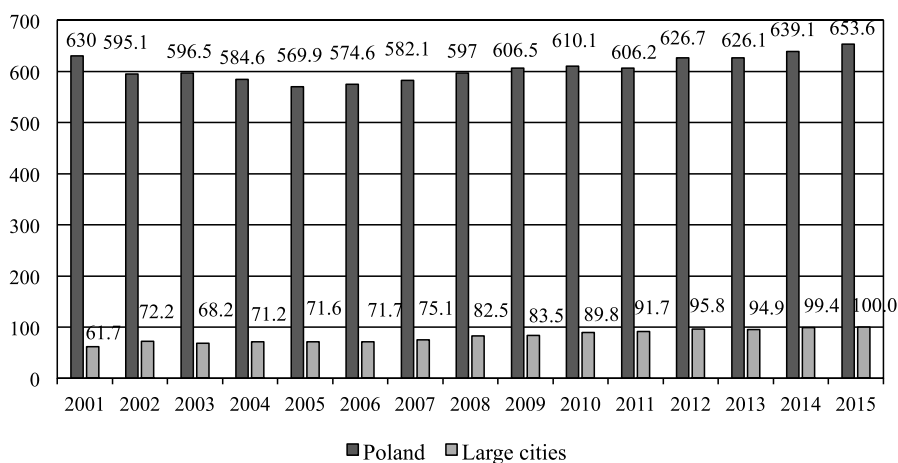
In 2015, the seven major Polish cities offered 100,000 bed places in collective accommodation establishments, accounting for 16.3% of all the bed places in Poland. In 2001–2015, the number of bed places in the cities in question increased by 51.9%, whereas their share in the total number of bed places in

Poland went up from 9.8% to 16.3%. Whereas the number of bed places in Poland showed certain fluctuations in the period covered, the number of bed places in major cities steadily increased between 2001 and 2015.

In 2001–2015, the most rapid growth in the number of bed places was observed in Cracow (by 125.6%), followed by Poznań (98.5%) and Wrocław (71.3%). Obviously, the most buoyant rise in the number of bed places was noted at hotels. In Gdańsk, Cracow and Wrocław it soared by 193.8%, 177.4% and 101.0% respectively. In the seven cities under discussion, the overall number of bed places at hotels went up by 92.0%.

The development of accommodation establishments in the selected cities resulted from both an increased number of foreign visitors to the largest cities and greater interest from Polish residents in staying at accommodation establishments, particularly at hotels. The above was also accompanied by a rise in the occupancy rates of bed places even in the cities characterised by the highest increases in the number of bed places.

Figure 1. Number of bed places in Poland and in the selected cities (thousand)



Source: Central Statistical Office (Główny Urząd Statystyczny), Local Data Bank (Bank Danych Lokalnych).

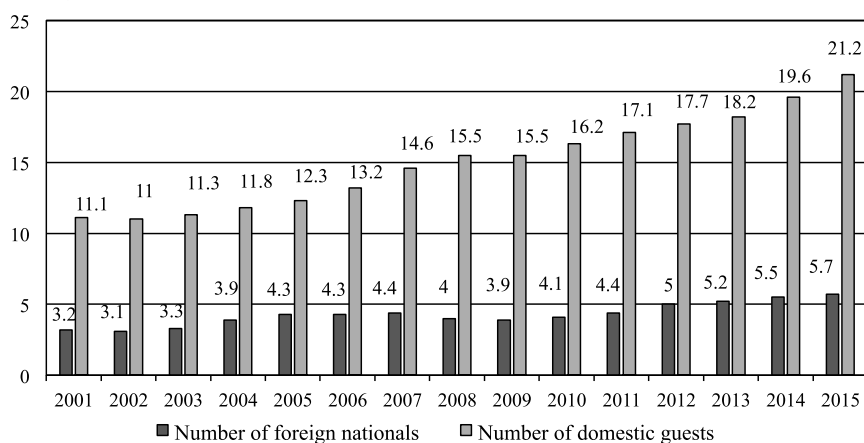
In 2015, the seven major cities of Poland were visited by 8.7 million guests, including 3.2 million foreign visitors and 5.5 million domestic guests.

It is worth emphasising that in 2001–2015 the number of guests in Poland rose by 89.3%, with the growth rates of 80.5% and 91.8% for foreign and domestic visitors respectively. At the same time, the number of guests at accommodation establishments of the seven cities jumped by 131.9%: in the case of foreign visitors by 102.1% and for domestic guests by 153.9%.

Therefore, in 2001–2015, the overall share of guests staying at the accommodation establishments of Poland's seven major cities in all Polish accommodation facilities augmented from 26.5% to 32.5% (by 6 percentage points), with the proportion of foreign guests at accommodation establishments of the cities concerned rising from 50.9% to 57.0% (by 6.1 percentage points) and that of domestic guests – from 19.6% to 25.9% (by 6.3 percentage points).

The most impressive increases were noted in Łódź (by 192.8%), Cracow (by 167.9%) and Gdańsk (by 157.4%). The rates of growth in the number of guests at accommodation establishments of the above-mentioned three cities were double the figure for Poland as a whole.

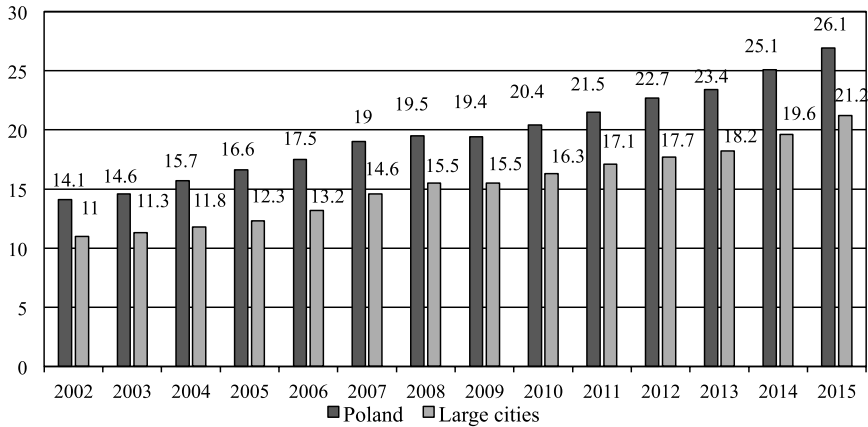
Figure 2. Domestic and foreign guests at accommodation establishments in 2001–2015 (million)



Source: Eurostat, Central Statistical Office – GUS.

A particularly robust increase concerned domestic guests. In the period covered, the respective growth rates were 91.8% for Poland and as high as 153.9% for the largest cities. Among those, the top performers were the accommodation establishments located in Warsaw (up by as much as 205.8%), ahead of Cracow (177.6%) and Łódź (177.0%). Similar although not as steep increases were noted for foreign guests. Whereas the number of foreign guests at Polish accommodation establishments went up by 80.5%, the respective growth rate for the seven cities was as high as 102.1%. The greatest increases in the number of foreign guests at accommodation establishments were observed in Łódź, Cracow and Gdańsk (by 258.5%, 158.3% and 140.7% respectively).

Figure 3. Guests at the accommodation establishments of Poland and Poland's cities

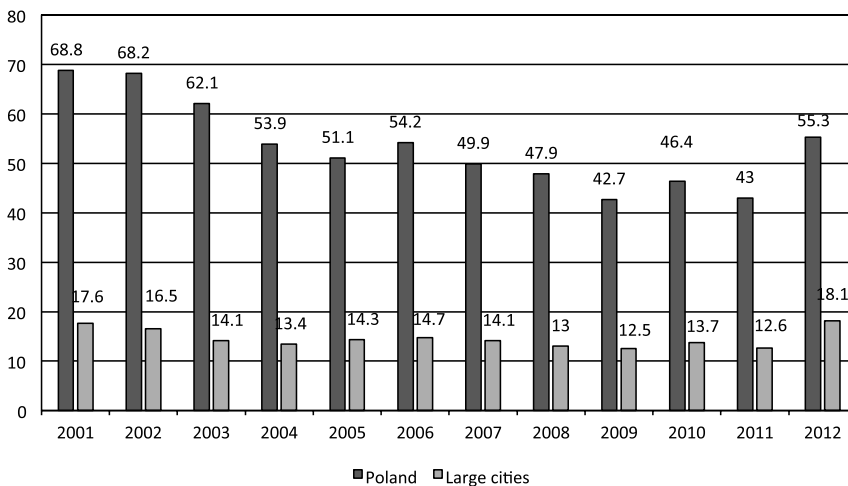


Source: as in Figure 2.

Estimated tourist traffic in Poland's selected cities

Between 2001 and 2012, the Institute of Tourism in Warsaw systematically estimated inbound traffic in the selected seven cities in Poland. The estimates were based on unpublished data of the Central Statistical Office on the number of guests at accommodation establishments by municipality as well as on the results of surveys of foreign nationals leaving Poland and on data from surveys of Polish residents' tourism activities.

Figure 4. Number of tourism trips taken by domestic and foreign tourists in Poland and in the selected cities (million)



Source: estimates of the Institute of Tourism in 2002–2013.

Both the number of tourism trips taken by domestic and foreign tourists travelling in Poland and that of visitors to the cities under analysis, in contrast to the number of guests at accommodation establishments, fluctuated between 2001 and 2012, with a general downward trend.

In 2003–2005, a fall in the number of arrivals of foreign tourists was mostly due to the introduction of visas for nationals of the Eastern neighbouring countries, whereas that noted in 2007–2009 was caused by the strengthening of the Polish zloty and by the overall financial crisis affecting virtually all the European countries, which hindered inbound tourism.

The main causes of a significant decline in the number of domestic tourists in Poland observed in previous years were as follows:

- 1) An abrupt decrease in the number of weekend trips including an overnight stay in favour of same-day trips to friends, mostly to barbecue parties;
- 2) Increased attractiveness of staying in the place of residence or of same-day visits to cities, mainly by groups of young people. Important factors included the attractiveness of shopping centres and the development of food- and beverage-serving establishments;
- 3) Reduced prices of outbound tourism trips and a rise in the number of tours bought from travel agencies.

In 2012, the UEFA European Championship European had a significant upward effect on the number of visitors to large cities and to Poland.

During the eleven years covered, the developments observed in particular cities varied widely. The number of foreign tourists more than tripled in the cities of western Poland (Wrocław and Szczecin). The growth in the number of visitors to the two cities mostly resulted from greater interest on the part of German residents and markedly improved accommodation establishments. Ranked 3rd and 4th, Gdańsk and Cracow experienced a more than twofold increase in the number of foreign tourists. The reasons included both greater interest in the two cities and improved transport connections (in particular air transport connections).

A very abrupt fall in the number of foreign tourists in Warsaw stemmed from increased interest in visiting other cities but primarily from a decline in the number of visitors from Belarus, Russia and Ukraine related to the introduction of visas. For example, in 2003 the number of foreign visitors to Warsaw dropped by 24% in comparison with 2001 and in 2004 it declined by a further 6%. A similar development, although due to a different cause (the economic crisis in Europe), was a decrease in the number of foreign tourists in 2008 (by 15% on the previous year) and in 2009 (by nearly 13% on the previous year).

It is worth pointing out a significant rise in the number of domestic visitors to Gdańsk and, to a lesser degree, to Cracow.

Table 1. Change in the number of tourists visiting the selected cities in 2001–2012 (%)

Change in %	Gdańsk	Cracow	Poznań	Szczecin	Warsaw	Wrocław
Tourists, total	71.4	53.2	-5.3	66.7	-35.0	64.3
Domestic tourists	44.4	25.0	-16.7	-16.7	-7.7	9.1
Foreign tourists	120.0	113.3	14.3	233.3	-61.0	266.7

Source: Own calculations based on estimates of the Institute of Tourism.

Despite considerable decreases, in 2012 Warsaw remained the Polish city most visited by domestic and foreign tourists alike. The Polish market in tourism trips by both domestic and visitors is dominated by two cities: Warsaw and Cracow. Those were followed by Gdańsk and Wrocław. The last two cities significantly improved their attractiveness to both domestic and foreign tourists.

Table 2. Tourist arrivals in the selected cities in 2012 (million)

Arrivals, million	Gdańsk	Cracow	Poznań	Szczecin	Warsaw	Wrocław
Tourists, total	2.4	3.6	1.8	1.5	5.2	2.3
Domestic tourists	1.3	2.0	1.0	0.5	3.6	1.2
Foreign tourists	1.1	1.6	0.8	1.0	1.6	1.1

Source: as in Table 1.

Conditions of changes in the number of visitors to the selected cities of Poland in 2001–2012

Whereas the number of foreign tourists in Poland is determined by administrative reasons (the introduction of visas, joining the European Union), fluctuations in the exchange rate of the Polish zloty against major currencies, the economic situation in countries generating the greatest tourist traffic to Poland and the development of tourism infrastructure (accommodation facilities, food- and beverage-serving establishments, the availability of transport infrastructure and services), the development of domestic tourism of Polish residents is primarily driven by factors such as growth in income, prices in the domestic market, particularly prices charged by accommodation establishments, food- and beverage-serving establishments and fuel prices and the development of the automotive sector (as travelling by car definitely dominates as the means of transport during tourism trips), followed by having relatives and friends living away from one's place of residence. As already mentioned, an important role is also played by changing leisure patterns.

A major determinant of tourism attractiveness is the development of accommodation facilities. All the large Polish cities experienced a buoyant development of accommodation facilities. Between 2001 and 2015, the number of bed places at accommodation establishments located in the selected large cities rose by an average of 64.7%, with the growth rate ranging from 31.4% for Szczecin to 129.7% for Cracow.

Table 3. Bed places at the accommodation establishments of large cities (thousand)

Year	Gdańsk	Cracow	Poznań	Szczecin	Warsaw	Wrocław
2001	11.0	11.8	4.4	5.1	18.2	6.4
2015	13.6	27.1	8.8	6.7	26.5	11
2015/2001 change in %	23.6	129.7	100.0	31.4	45.6	71.9

Source: Central Statistical Office – GUS.

The growth in the number of bed places had a significant upward effect on the number of guest at accommodation establishments, mostly on the number of persons using cheaper accommodation services. Outside the seasons of increased tourist traffic (long weekends, summer holidays), it was less relevant to the number of visitors to large cities.

The number of guests at accommodation establishments was pushed up considerably by an increased number of accommodation services offered through typical websites (such as booking.com). Greater opportunities for checking the lowest prices and comparing offers boosted interest in accommodation establishments in large cities.

Another important driver for growth in the attractiveness of large cities was an enormous rise in the capacity of air transport. In the fifteen years covered, airport traffic in Gdańsk and Wrocław increased by a factor of eleven and only in the most visited city of Warsaw it nearly tripled. Although air passenger traffic was mainly determined by an augmented number of departing and arriving Polish residents, they also frequently stayed the night before departure in the city of departure.

The number of passengers carried by air was greatly influenced by the development of low-cost airlines but also by a considerable rise in the number of foreign airports offering direct connections with Polish airports.

Table 4. Passengers carried by air in large cities (thousand)

Year	Gdańsk	Cracow	Poznań	Szczecin	Warsaw	Wrocław
2001	0.32	0.55	0.23	0.07	4.71	0.21
2015	3.71	4.22	1.50	0.41	11.2	2.32
2015/2001 change in %	1,160	767	652	586	237	1,105

Source: Civil Aviation Authority (Urząd Lotnictwa Cywilnego).

Another determinant of tourist traffic is the increased tourism attractiveness of large cities. To a lesser extent, it concerned hardly changed historical and natural values; present-day attractions mattered more. The most important factors of greater interest in visiting cities included buoyant development of cultural highlights, particularly improved attractiveness and an increased number of cultural events (specifically, big concerts as well as major theatre and entertainment events), including greater attractiveness of museum facilities.

Attractions offered by large cities tend to divert tourists' attention from the countryside, smaller cities and towns. Apart from the seaside in the summer, cities are the most preferred tourist destinations for Polish residents. Furthermore, the domination of several largest cities is clear as well. Cities attracting significant interest from tourists but not mentioned in previous years include Łódź, Poland's second largest city, experiencing a tourism boom in recent years.

Conclusions

With a general downward trend of the number of tourism trips (by both Polish residents and foreign tourists) in Poland between 2001 and 2012, the number of visitors to the selected large cities was largely stable. Decreases in the number of tourists mainly concerned stays in rural areas, in the mountains, forests and by lakes.

An opposite trend was observed among guests at accommodation establishments. In this case, both the total number of guests staying at facilities across Poland and the number of guests at accommodation establishments located in the selected cities were on the rise. It means a change in the travelling patterns of both domestic and foreign tourists.

An increasing group of visitors used tourism infrastructure (organised accommodation facilities, food- and beverage-serving establishments, travel agency services) and other services offered by cities. Therefore, the importance of typical holidays and tours of Poland diminished in favour of wider access to and use of tourism, cultural and commercial facilities. Such services are primarily offered by large cities.

Therefore, the following question remains open: How to stimulate interest in visiting rural areas, smaller cities and towns? Why do intensive measures for promoting Polish natural and rural values, taken in Poland but mostly internationally, fail to bring the expected results? In spite of the development of forms such as rural tourism, why has the number of rural tourism accommodation facilities not grown – after robust increases noted in the 1990s – in the 2000s and the 2010s, even though their standards have markedly improved?

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Warunki rozwoju turystyki w dużych miastach w Polsce

Streszczenie

Od lat Instytut Turystyki w Szkole Głównej Turystyki i Rekreacji w Warszawie gromadzi dane opisujące sektor turystyki i branże wspierające lub determinujące rozwój turystyki w największych miastach Polski. Omawiane badania wzięły pod uwagę rozwój turystyki w Gdańsku, Krakowie, Łodzi, Poznaniu, Szczecinie, Warszawie i Wrocławiu między rokiem 2001 a 2015. W latach 2001-2015 liczba miejsc noclegowych w analizowanych miastach zwiększyła się o 51,9%, podczas gdy ich udział w ogólnej liczbie miejsc noclegowych w Polsce wrósł od 9,8% do 16,3%.

Między latami 2001 a 2012 Instytut Turystyki w Warszawie systematycznie szacował turystykę przyjazdową w wybranych siedmiu miastach w Polsce. Przez jedenaście lat objętych badaniami zmiany obserwowane w poszczególnych miastach bardzo się różniły. Liczba turystów zagranicznych zwiększyła się ponad trzykrotnie w miastach Polski zachodniej (Wrocław i Szczecin). Wzrost liczby przyjezdnych do tych dwóch miast przeważnie wynikał z większego zainteresowania ze strony mieszkańców Niemiec i z wyraźnie poprawionej sytuacji w obiektach noclegowych. Plasujące się na trzecim i czwartym miejscu Gdańsk i Kraków odnotowały ponad dwukrotne zwiększenie liczby turystów zza granicy. Przyczyny obejmowały zarówno większe zainteresowanie tymi dwoma miastami, jak i usprawnione połączenia komunikacyjne (w szczególności połączenia lotnicze).

Nagły spadek liczby turystów zagranicznych w Warszawie wynikał ze zwiększonego zainteresowania przyjazdem do innych miast, ale przede wszystkim ze zmniejszenia się liczby przyjezdnych z Białorusi, Rosji i Ukrainy w związku z wprowadzeniem wiz.

Słowa kluczowe: ruch turystyczny, turystyka miejska, warunki rozwoju turystyki.

Kody JEL: Z31

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Afiliacja:
dr Krzysztof Łopaciński
Szkoła Główna Turystyki i Rekreacji
Wydział Turystyki i Rekreacji
ul. Stokłosa 3
02-787 Warszawa
e-mail: k.lopacinski@vistula.edu.pl