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Arrivals of Foreigners to Poland with Particular Emphasis on Visitors from Outside the Schengen Area – Characteristics and Prospects for the Future

Abstract. Poland is very popular among foreigners. Tourism is an important part of the Polish economy. The share of tourism in GDP remains at a level of 5-6%, with employment estimated at approx. 760 thousand. People (4.7% of the total workforce), with approx. 170-200 thousand. People are employed in activities related to accommodation and food service. Proceeds from the arrivals of foreigners goes back to the year 8-9 billion euros, of which about half is the proceeds of arrivals of foreign tourists. The aim of the article is to present the characteristics of arrivals of foreigners to Poland, with particular emphasis on visitors from outside the Schengen Area. On the basis of statistical data I analysed arrivals of foreign tourists to Poland and presented the changes in the structure of those arrivals. The article also shows the diversity of tourism revenue in the period considered. For this purpose a method of "Desk Research" based on data from Central Statistical Office, Institute of Tourism, Ministry of Sport and Tourism. The article also includes the perspective of the development of inbound tourism. The article presents the results of research conducted in October 2016 in Kiev among 152 respondents. The aim of the study was to collect the information on the attractiveness of Poland for Ukrainian visitors. Convenient sampling method was used to select the survey participants. Diagnostic survey method was used in the study and the direct technique was an interview without previously prepared questions. The results confirm that Ukrainians are willing to visit Poland.

Key words: arrival, Poland, Schengen, tourism

Introduction

Tourism is a key component of the development of every region in a given country. Globally, tourism is a very important, developing sector of the economy. In Poland it is still developing and becoming more and more valued. All changes in tourist movement, tourists' expectations and requirements regarding the type of the trip are undoubtedly consequences of the shift in lifestyle and consumption models. Such factors contribute to the change of the form and type of the tourist movement. Developing tourism is of great importance to the entire country. Tourism contribution to GDP rose from 4.7% in 2011, to 5.6% in 2015. Expenditures by foreign visitors also rose, from €7.6 billion in 2011 to €12.9 billion in 2015. (Turystyka 2016).

The market of tourist services is subject to constant change under the influence of various pulses from the international environment, as well as factors resulting from the specificities of national, regional and local. The impact of these factors is reflected both on the supply side, ie. The operation of companies in this sector, and demand, that is, the client or customer of tourism services (Zdon-Korzeniowska, Rachwał, 2011). Tourism

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development is a process whose effects can be observed in many areas: economic, social, political, ecological (Przeclawski, 1996).

The World Tourism Organization (UNWTO) in relation to a given country distinguishes the following forms of tourism:

- National: travel residents of their own country;
- Inbound: arrivals to the country people constantly living abroad;
- Outbound trips of inhabitants of a country abroad (Cymańska-Garbowska, Steblik-Wlazlak, 2014).

The potential of the tourism sector in Poland is not being used to its full potential. The reasons for this are, among others, poor (albeit improving) accommodation and dispersed tourist offer, concentrated on traditional products. What is more, an innovative approach to tourism and its products, manifesting itself in the implementation of innovation in the service provision system, the creation of new, innovative products, or utilising the results of cooperations and synergies in order provide tourist services is not sufficiently developed. The cooperation of the organisations and companies of this sector in the development of new products and services and in the implementation of developing projects is not sufficient. Tourism enterprises, which are mainly small and medium-sized, as most companies of this type that are suffering from insufficient qualifications of employees and limited possibilities of the development needs being financed. One effect of these weaknesses is a high level of seasonality of the sector. All mentioned factors restrict individual companies, institutions, and organisations, as well as entire regions, from becoming more efficient in the use of existing resources. These weaknesses are even more conspicuous in the light of changes occurring in tourism around the world. (Program 2015)

Despite the above problems, tourism in Poland has large potential for development. An important feature of the development of tourism is the activation of regional potentials and specialisations based on tourist services and sectors associated with tourism. When it comes to the competitiveness of tourism, Poland was ranked 42 (out of 140 countries) in "The Travel & Tourism Competitiveness Report 2013". It is 7 places higher than in 2011, when Poland ranked 49 (out of 139 countries). It was also a much better result than in 2009, when Poland ranked 58 (out of 130 countries). In the report, a synthetic indicator of the competitiveness of the tourism industry was analysed. It consisted of 14 components: the tourism policy, sustainable development, safety, healthcare and sanitation, tourism as a country's priority, air transport infrastructure, road transport infrastructure, telecommunication and tourist infrastructure, price competitiveness, human resources, approach to tourism, natural and cultural resources. The report clearly shows that Poland is competitive due to its tourism potential in the form of anthropogenic and natural attractiveness (respectively 18th and 66th place). Poland was also rated positively in terms of sustainable development of tourism (37th place), quality of human resources (32nd place), and telecommunication infrastructure (41st place). The authors of the concept and methodology of creating the tourism competitiveness index stress that the ranking of countries developed as a part of the index is positively (and pretty highly) correlated both with the number of tourist arrivals of tourists and tourism revenue of individual countries (Program 2015).

Poland thanks to its location is an attractive transit country between East and West and North-South. After the geopolitical changes that have occurred in Central and Eastern Europe in 1989-1991, increased rank axis linking in a latitudinal countries of Western and Central Europe with the countries of Eastern Europe. Special importance Poland's eastern

border, the more that since 1999 it has become the eastern border of NATO, and since May 2004. - Eastern border of the European Union. This leads to a much greater interest in the eastern Polish frontier by both state authorities and local government administration (Ruszkowski 2014).

Poland's entry into the Schengen Area in 2007 made it more difficult to travel to Poland from countries outside the European Union, especially from Russia, Belarus and Ukraine. After 2009 Poland again became a popular European tourist destination, noting a steady increase in the number of tourists. Because of Poland's entry into the Schengen Area, its eastern border has become the outside border of the European Union. In order to facilitate the movement of people in border areas, in 2009 and 2012 the agreement on local border traffic (MRG) between Poland and Ukraine and Russia entered into force. Between 2009 and 2013 local border traffic for Poland was about 23.6 million people.

According to the latest data of the World Tourism Organization (UNWTO) the international tourist movement in 2015 was 4.4% higher than a year before. Over 1.184 billion people travelled abroad - it is about 50 million more than in the previous year. It is the sixth consecutive year, with an increase in the number of international tourists above the average.

According to the organization's data, last year almost all the regions of the world experienced growth in the number of visiting tourists. The biggest growth (+ 5%) occurred in Europe, the Americas and in the countries of Asia and Pacific region.

In Europe, which is the most visited region with more than half of international tourists in the world, the number of travellers in 2015 stood at 609 million and was about 29 million higher than in 2014. Tourists prefer to visit Northern, as well as Central and Eastern Europe (+ 6%) which has achieved much better results than in 2014, when there has been a decline caused by Russia and Ukraine conflict.

According to the UNWTO forecasts for 2016 are also optimistic. It is expected that the increase in the number of international tourists may be slightly smaller than in the two previous years and it will reach about 4%. The largest increase is expected in the countries of Asia and Pacific region, in the Americas (+ 4% to + 5%), and in Europe (+ 3.5% to + 4.5%) (Międzynarodowy..., 2015).

Data and methods

To perform the analysis data from the following sources were used:

- Central Statistical Office,
- Ministry of Sport and Tourism,
- National Bank of Poland- other available publications and analyses.

For this purpose a method of "Desk Research" based on data from the Central Statistical Office, the Institute of Tourism, the Ministry of Sport and Tourism.

As a result of the conducted analyses the perspectives associated with the development of tourist movement were presented. The results of personal research carried out in Kiev in October 2016 on the group of 152 people were also used. The aim of the study was to collect the information on the attractiveness of Poland for Ukrainian visitors. Convenient sampling method was used to select the survey participants. Diagnostic survey method was used in the study and the direct technique was an interview without previously prepared questions.

Purposes and motives for arrival of foreigners in Poland

According to the estimates of the Ministry of Sport and Tourism, 77,737 million foreigners arrived in Poland in 2015. It is about 5.4% more than in the previous year. The number of tourists was estimated at 16,722 million (about 4.5% more than in 2014). The data were presented in table 1.

Table 1. The number of arrivals between 2014 and 2015, according to the country/group of countries (in thousands)

Country/group of countries	Total arrivals		Dynamics 2015/2014 (%)	Including tourists		Dynamics 2015/2014 (%)
	2014	2015		2014	2015	
Total	73750	77737	105.4	1600	16722	104.5
27 EU countries	56013	58971	105.3	11379	12003	2015.5
The Old EU	34659	36385	105.0	9397	9951	105.9
Germany	30260	31681	104.7	5743	6012	104.7
United Kingdom	862	949	110.1	664	753	113.4
France	572	599	104.7	427	456	106.8
Italy	444	476	107.2	398	425	106.8
Netherlands	487	521	107.0	399	430	107.8
Austria	432	447	103.5	355	369	103.9
Sweden	297	333	112.1	257	287	111.7
Other countries of EU-15	1307	1379	105.5	1154	1220	105.7
The New EU	21354	22585	105.8	1982	2052	103.5
Czech Republic	11374	11911	104.7	266	283	106.4
Slovakia	5769	6242	108.2	159	169	106.3
Lithuania	2605	2789	107.1	605	632	104.5
Hungary	257	274	106.6	208	221	106.5
Latvia	742	743	100.1	363	356	98.1
Other countries of UE-12	607	626	103.1	381	391	102.6
Neighbours from outside the Schengen Area	15605	16479	105.6	2888	2872	99.4
Ukraine	8732	10533	120.6	1072	1198	111.8
Belarus	4066	3606	88.7	811	801	98.8
Russia	2807	2339	83.3	1003	873	87.0
Important overseas countries	780	806	103.3	616	631	102.4
USA	508	556	109.4	394	429	108.9
Other overseas countries*	271	251	92.6	223	203	91.0
The rest of the world	1352	1482	109.6	1117	1213	108.6

* Australia, Japan, Canada, South Korea.

Source: Department of Tourism of the Ministry of Sport and Tourism, Warsaw 2015.

Most people arriving in Poland come from Ukraine. From 2014 to 2015 their number increased by as much as 20.6%. The situation is different when it comes to Belarus. The number of arrivals of people from that country decreased by more than 10%. In the case of Russia the decrease is even more significant and amounts to 16.7%. In Table 2 was presented the purposes of a visit to Poland. The main purpose is paying a visit (over 40%) followed by business trip (over 25%) and tourist trip (about 20%).

Table 2. The purposes of a visit (%)

The main purpose of a visit	Total		Germany		EU-14		New EU countries		Russia Belarus Ukraine		Important overseas countries	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
Business	28.7	24.3	12.5	10.3	22.8	19.7	54.9	47.4	49.8	42.0	20.9	19.7
Tourist trip	18.4	22.9	13.6	22.4	24.1	26.7	22.1	24.8	15.2	15.7	28.4	29.3
Paying a visit	40.7	40.5	66.0	60.7	42.5	44.4	13.6	16.8	11.9	13.1	44.6	44.7
Transit	2.1	2.8	1.6	1.2	1.6	2.0	2.7	4.6	4.3	8.0	0.8	0.4
Shopping	4.4	4.5	1.8	2.0	0.6	0.4	3.5	3.6	16.8	18.9	0.0	0.0
Other purpose	5.8	5.1	4.6	3.5	8.3	6.8	3.2	2.7	2.0	2.3	5.1	5.9

Source: Department of Tourism of the Ministry of Sport and Tourism, Warsaw 2015.

The situation is different in the case of foreigners from Russia, Belarus and Ukraine. For these countries, work (about 50%) and tourism (over 20%) are the main reasons for visit. The next reason was shopping. It means that this group of foreigners is a chance for the development of tourism in Poland. Tourism, which is becomes more and more important purpose of visit, may be combined with shopping.

Table 3. Length of stay (%)

Length of stay	Total		Germany		EU-14		New EU countries		Russia Belarus Ukraine		Important overseas countries	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
1 to 3 nights	55.9	52.5	42.3	40.5	44.3	41.4	90.8	87.9	88.1	85.1	20.4	15.8
4 to 7 nights	31.1	31.3	45.0	44.2	38.5	35.3	6.3	9.4	8.1	10.2	22.9	29.9
8 to 28 nights	11.6	14.5	12.2	14.5	16.1	21.6	2.7	2.4	3.3	4.1	45.5	40.4
More than 4 weeks	1.3	1.7	0.4	0.7	1.2	1.7	0.2	0.3	0.5	0.7	11.2	13.8
Average number of nights	5.1	5.5	5.1	5.5	5.5	6.3	2.1	2.3	2.5	2.9	15.8	15.9

Source: Department of Tourism of the Ministry of Sport and Tourism, Warsaw 2015.

Table 4. Accommodation (%)

Place of stay	Total		Germany		EU-14		New EU countries		Russia Belarus Ukraine		Important overseas countries	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
Hotels, motels	27.9	32.3	17.0	23.7	37.9	38.6	23.5	27.7	25.8	31.8	50.6	51.0
Family or friends	46.5	44.1	74.5	65.4	47.3	46.0	17.6	20.3	15.6	18.4	46.6	47.0
Bed & breakfasts	3.8	4.8	3.8	4.7	5.6	7.0	1.1	3.9	3.8	3.4	1.4	1.1
Private accommodation	2.5	3.7	1.0	3.4	2.4	3.5	5.2	5.7	4.2	4.5	3.4	3.4
Other	20.5	16.8	4.2	4.7	8.5	6.6	52.7	42.5	52.7	43.2	1.9	3.0

Source: Department of Tourism of the Ministry of Sport and Tourism, Warsaw 2015.

Table 3 shows the length of stay. The length of stay from 1 to 3 nights (over 50%) is dominating, followed by 4 to 7 nights (over 30%) and 8 to 28 nights (about 15%). The situation is different in case of visitors from outside the Schengen Area, here the length of stay ranging from 1 to 3 nights is the most common (over 80%).

Table 4 shows types of accommodation used by travellers. Stay with friends or family (more than 45%) is the most popular, then hotels or motels (about 30%). The situation is similar in case of foreigners from outside the Schengen Area.

The amount and type of the expenditure of foreigners visiting Poland

The research from 2015 shows that the average expenditure of tourists visiting Poland stood at \$446 per person (about 2% less than in 2014) and \$69 per day of stay, which is about 4.9% more than in the previous year.

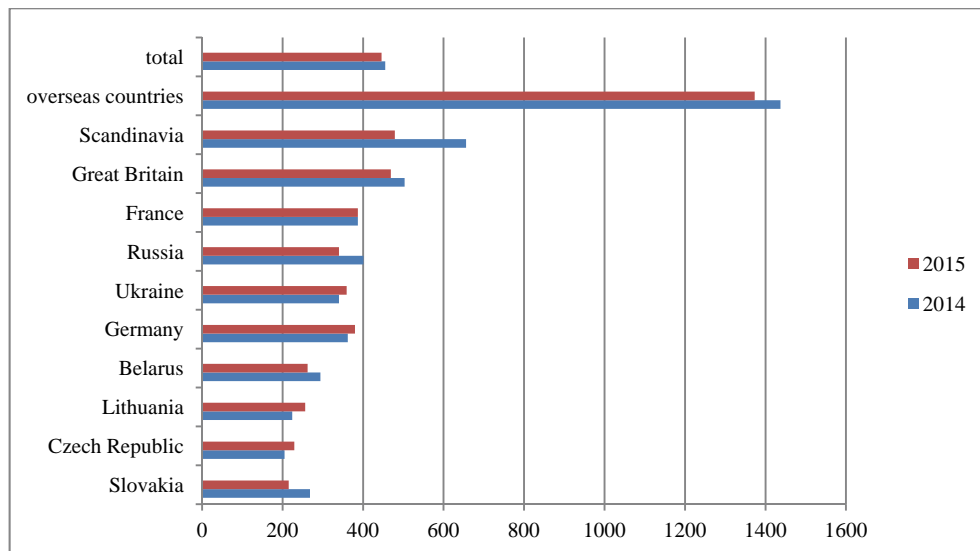


Fig. 1. The average expenditure per tourist in 2014 and 2015 in USD (by country)

Source: Department of Tourism, based on surveys conducted by GUS, MSiT, NBP.

Significant degree of variability is exhibited in the expenditure by country. It ranged from \$215 (Slovakia) to \$1373 (overseas countries). An increase in the average expenditure per person has been recorded in case of visitors from Lithuania (14.4%), the Czech Republic (11.6%), Ukraine (5.4%), and Germany (5.2%). There was a decrease in the expenditure of foreigners from Scandinavia (-26.9%), Slovakia (-19.7%), and Belarus (-10.8%).

Figure 2 shows the average expenditure of tourists per day of stay. In 2015 it ranged from about \$41 (France) to \$94 (Russia and Lithuania) and \$88 (Belarus).

Since 2014 there has been a noticeable difference in the expenditure of visitors from certain countries. A significant increase in the expenditure per day of stay can be noted in

case of Germany and Lithuania (27%), and the opposite when it comes to France (decrease by over 10%) and visitors from outside the Schengen Area: Belarus, Russia and Ukraine.

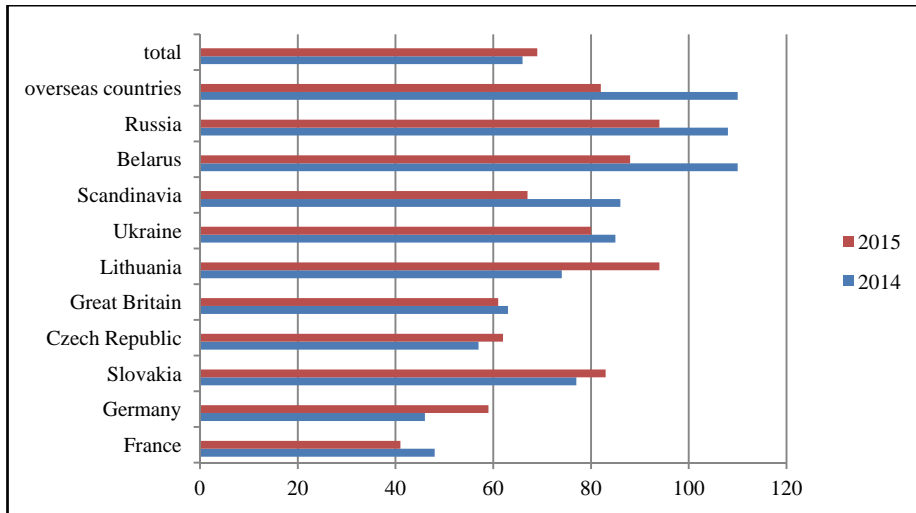


Fig. 2. The average expenditure of tourists per day of stay between 2014 and 2015 in USD (by country)
Source: see fig. 1.

The arrivals of foreigners in Poland have significant consequences for the country. These consequences can be studied from different angles: economic, logistic, sociocultural, ecological, demographic, political, aesthetic, psychological. (Rakowski, Teperek, 2009).

In the article mainly the economic consequences will be discussed. They come down to the following people crossing the border require the assistance of many different institutions in a given country (embassies, consulates, passport offices, tourist offices, hotels, guides).

In order to provide these services, it is necessary to train the staff which reduces the unemployment.

Another important element is broadly defined infrastructure (roads, motorways, etc.) and building of border crossings. Travellers require places to stay, eat and rest. For this purpose hotels, restaurants, swimming pools, and spas are build. New investments result in economic recovery and the demand for money appears. Visitors bring foreign currencies to our country and our citizens travelling abroad, take currency with them. It is important to keep the balance in our favour.

The results of personal research

The results of personal research carried out in Kiev in October 2016 on the group of 152 people were also used in this study. The study included 152 people who agreed to answer few questions regarding trips to Poland and their purpose, length of stay and accommodation. In this part I discuss the collected data. 89 (59%) respondents have visited Poland. The remaining rest (41%) have never been to Poland but say that they may visit Poland in future. Figure 3 shows the purpose of the Ukrainian visitor's trip to Poland.

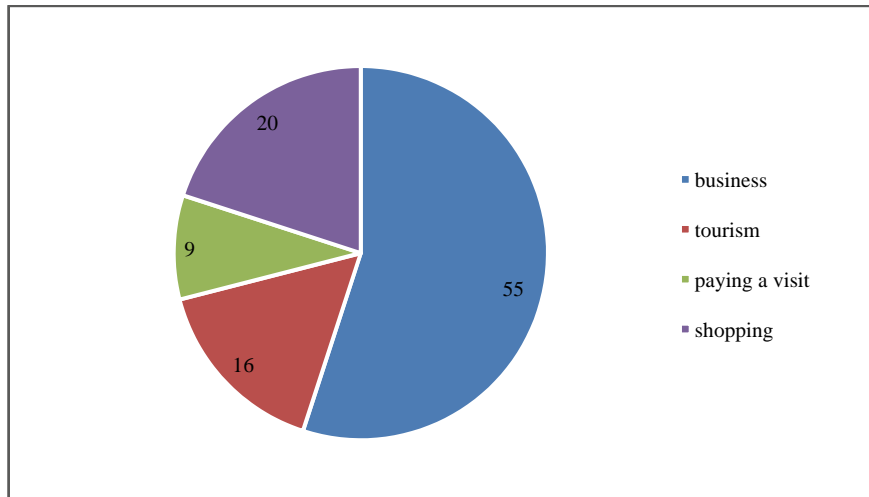


Fig. 3. The purpose of Ukrainians visiting Poland (%)

Source: Data collected personally.

Data presented in the chart shows that most visitors came to Poland to work (55%), next reason was shopping (20%), then tourism (16%), and paying a visit (9%). The collected data overlaps with a general trend in Polish inbound tourism. Among those who have not been to Poland so far (41%), 11 people (17%) stated that they already took steps to get a job in Poland.

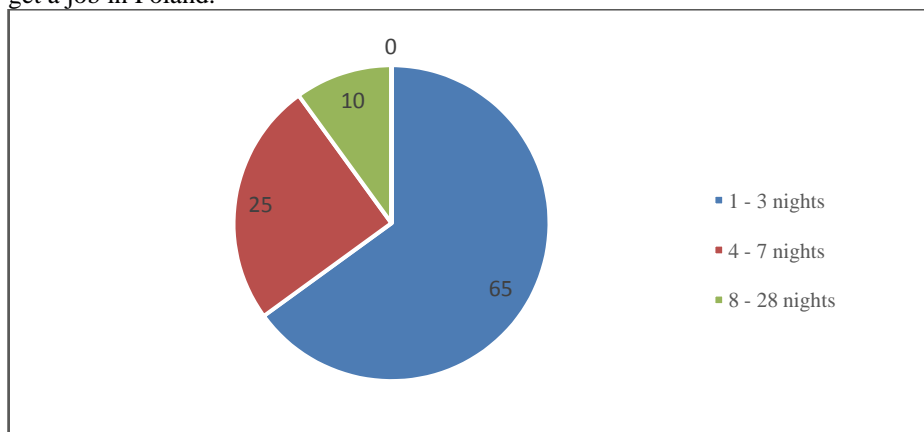


Fig. 4. The length of stay in Poland (%)

Source: Data collected personally

Most visitors stayed in Poland for a short time of 1 to 3 nights. The purpose of their visit was mostly business or shopping. A small group of visitors (25%) stayed for 4 to 7 nights and. These were mostly tourist trips with aim to visit cities such as: Warsaw, Krakow, Zakopane, or Tri-City. The smallest group of people (10%) came to Poland for a

longer period of time, ranging from 8 to 28 days. These were mostly were business trips. Those surveyed declared willingness to re-arrival to Polish. Most people indicated a desire to fulfill a tourist destination.

Future perspectives

Inbound tourism to Polish will develop. According to experts UNWTO in 2020, Europe will arrive 664 million tourists, the average annual growth in 2004-2020 is 3%, and the increase in 2004-2020 up to 60.4%. The largest increase in receipts from inbound tourism indicate countries: Latvia, Russia, Slovakia, Belgium, Sweden, Romania, Poland, Germany, Ireland, Ukraine and the Netherlands (UNWTO, 2006, 2007)

The development of travel and tourism according to the report Future Traveler tribes in 2020 will be determined by the following favorable trends (Bartoszewicz, Łopaciński, 2007):

1. The increase in world population to 8 billion in 2025 (1.5 billion over 20 years);
2. Increased global migration. Growing global migration increases the need for foreign travel. Many immigrants feel a strong connection with native countries, they have many reasons to return, visiting family or friends. The number of people who want to leave their country is increasing.
3. Globalization of business. The rapid growth in world trade leads to increased cross-border movement of goods, services and capital.
4. The globalization of travel and tourism. According to the WTO during the last fifty years, tourism has become one of the largest and most dynamic industries in the world.
5. The impact of the airlines on consumer behavior. The emergence of low-cost airlines has increased the opportunities to travel to these groups, which previously could not afford it because of the high costs.
6. Growing affluence. As satisfying the material needs of people begin to pay more attention to the very agreeable.
7. The development of technology will reduce the cost of travel.

Summary

In the article the characteristics of arrivals of foreigners to Poland were presented, with particular emphasis on non-Schengen.

The analysis shows that:

- In 2015 came to 5.4% Polish foreigners more than in the previous year, including in the case of the neighbors outside the Schengen 5.6% more;
 - The main objectives of the arrivals were visits, business trips and tourism, in the case of the neighbors outside the Schengen business trips, tourism, shopping;
 - Foreigners visited Poland mainly from 1 to 3 days (over 50%), from 4 to 7 days (over 30%); in the case of the neighbors outside the Schengen most (over 80%) decided to stay 1-3 days;
 - Most people used for accommodation in motels and hotels and with family or friends.
- As part of the study received their similar values.

The increase in the number of arrivals to the Polish in the coming time will depend on:

- A relatively good economic situation in countries that generate tourist traffic to Polish;
- Polish favorable image in the international arena;
- The availability of communication;
- Promotion of Polish arrivals to showing the magnitude of changes in the Polish tourist offer;
- Qualified staff who will implement innovative and modern management methods.

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