

Tourism Research, Development
and Promotion Association



TOURISM SATELLITE ACCOUNT FOR POLAND 2011

*Full version
Summary*

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1. Introduction

The Tourism Satellite Account (TSA) for Poland for 2011 constitutes follow-on work to the 2000, 2001, 2002 and 2005 accounts as well as to their simplified versions for several years. All the versions were prepared on the basis of the revised methodology proposed to the Ministry of Sport and Tourism in January 2014. It is consistent with the joint methodological framework developed by the WTO (presently the UNWTO), OECD and Eurostat, recommended by the European Commission to be applied by the Member States.

The full version of the account consists of a set of statistical tables contained in the final section, preceded by a descriptive part discussing the most important results of the TSA. The textual part of the study is divided into six chapters. Chapter 1 presents the main sources of information used in the preparation of the TSA. Further chapters are dedicated to the following issues: tourism consumption, tourism output and the contribution of tourism to GDP, labour force utilisation and fixed capital formation. Each of the above-mentioned chapters contains brief explanatory notes on the methodology and a presentation of the results with comments. The final chapter includes remarks on and proposals for further improvements in the methodology of the tourism satellite account for Poland, with a special emphasis on the simplified TSA methodology, allowing to assess the results of tourism with a shorter time lag in relation to the reference year.

The tourism satellite account presents a comprehensive picture of the Polish tourism economy in statistical terms, which ought to be useful for the monitoring of its results and to provide tourism development guidance. It has a merit of presenting the main macroeconomic aggregates, allowing to assess tourism in comparison with other sections of the economy. The study was prepared by the staff of the Warsaw School of Economics, the Institute of Tourism, the Warsaw School of Tourism and Hospitality Management and by members of the Tourism Research, Development and Promotion Association, composed of:

Associate Prof. Ewa Dziejic, PhD – tourism consumption of resident visitors, output, value added and scientific supervision,

Associate Prof. Magdalena Kachniewska, PhD – tourism employment, including the employment module,

Krzysztof Łopaciński, PhD – fixed capital formation and stock,

Teresa Skalska, PhD – tourism consumption of non-resident visitors.

The work on the TSA, facilitated by cooperation with the Central Statistical Office (CSO), was possible thanks to the financial contribution and efforts by the Department of Tourism at the Ministry of Economy.

2. The sources and scope of statistical information in the TSA for Poland

2.1. Basic methodological assumptions

Owing to the importance of tourism as an economic sector both globally and in individual countries as well as to the impossibility of analysing it within the standard system of national accounts, attempts at developing a tourism satellite account appeared rather early. The OECD and the World Tourism Organisation decided to coordinate their efforts and proposed a joint methodology, adopted and published by the World Tourism Organisation, OECD and Eurostat in 2001 and recommended by the EU as an instrument for the measurement of economic effects of tourism in the Member States. This edition of the TSA has been significantly revised to take into consideration the recommended methodological framework published in 2008. Whereas the contents and structure of the TSA remain basically unchanged, the changes introduced are conducive to greater transparency and comparability at the international level. The classification of economic activities and that of products and services have been adjusted to the currently applicable classifications PKD 2007 and PKWiU 2007.

A crucial component of the TSA methodology is the specification of its scope on the demand and supply sides. As regards the demand side, the assumption is that it is composed of the consumer expenditure of visitors. On the supply side, the TSA distinguishes four types of products and the corresponding types of economic activities:

- tourism characteristic,
- country-specific,
- tourism connected,
- other.

In line with the recommendations of the revised methodology, this version of the TSA consists of an internationally comparable module and a country-specific one. The former comprises a group of products and corresponding activities which can be regarded as characteristic of tourism: accommodation services for visitors, food and beverage serving services, passenger transport services, travel agencies as well as cultural and recreational services. The country-specific encompasses service activities incidental to air transport

and hospital rehabilitation services. To a certain extent, the inclusion of the former constitutes a violation of the principles adopted in the TSA methodology, i.e. that only direct visitor expenditure is to be taken into account. However, the above-mentioned principle was broken with regard to tour operators in respect of which visitor expenditure is estimated separately for specific components of tourism events. As regards services incidental to air transport, it was assumed that airport operation and air traffic control services were indispensable and must be included in the air fare package. For the purpose of avoiding double calculation of such services, their value was only separated for the consumption of non-resident visitors.

The analysis only covers activities by resident producers. Items related to imports, especially those of tourism characteristic products, are excluded from the TSA. In practice, it means that tourism consumption resulting from outbound tourism is only reflected on the supply and demand sides of the TSA to the extent to which it is satisfied by resident producers of the economy of reference (e.g. margins earned by travel agencies organising outbound tourism trips).

In accordance with the methodology applied, the TSA consists of a set of 6 main tables showing tourism consumption (Tables 1 to 4), tourism output (Table 5), the supply and use of tourism and other products (Table 6). The account is supplemented by tables presenting fixed capital formation in tourism characteristic activities, tables concerning employment in such activities, collective tourism consumption and certain tangible indicators. The tables contained in the Polish version of the TSA are basically consistent with those recommended; the most important difference concerns Table 6 where the data included in Table 5 are not repeated. The change was introduced for editorial reasons as the very extensive original version made the contents of that table less perceptible.

The types of activities and products covered by the TSA are presented below.

Tourism characteristic activities:

- 55. Accommodation for visitors
- 56. Food and beverage serving activities
- 49.1 Passenger rail transport, interurban
- 49.3 Other passenger land transport
- 50.1 Sea and coastal passenger water transport
- 50.3 Inland passenger water transport
- 51.1 Passenger air transport
- 77.11 Renting and leasing of cars and light motor vehicles
- 79 Travel agencies and other reservation service activities

91 Libraries, archives, museums activities and other cultural activities
93 Sports, amusement and recreational activities
68 Real estate activities

Country-specific tourism characteristic activities:

52.23 Service activities incidental to air transport
86 Human health activities

Other tourism connected activities:

47 Retail trade

Tourism characteristic products:

55. Accommodation services for visitors
56. Food and beverage serving services
49.1 Passenger rail transport services, interurban
49.3 Other passenger land transport services
50.1 Sea and coastal passenger water transport services
50.3 Inland passenger water transport services
51.1 Passenger air transport services
77.11 Renting and leasing services concerning cars and light motor vehicles
79 Travel agencies and other reservation services
91 Library, museum services...
93 Sports services...
Country-specific tourism characteristic products
52.23 Services incidental to air transport
86 Human health services (currently only 86.10.13 Hospital rehabilitation services)

Tourism connected products:

Retail trade of food products, fuels, alcoholic products as well as of wearing apparel and footwear

2.2. Tourism consumption

As regards the consumption of resident visitors in the economic territory of Poland, the following information sources were used:

- 2011 household budget surveys concerning tourism-related expenditure, conducted on a quarterly basis;
- survey on tourism activity and outbound tourism expenditure of Polish residents conducted by the Institute of Tourism;
- data concerning expenditure on business trips calculated for the national accounts; in accordance with the national accounts methodology, transport and accommodation services for visitors constitute intermediate consumption of businesses, whereas travelling allowances represent household income;
- 2012 report of the Polish Tour Operators Association (also containing the 2011 figures, 17 January 2013),
- *Analiza rynku transportu lotniczego w Polsce w 2011 r. / 'Analysis of the air transport market in Poland in 2011'* ULC, Warsaw 2012.

Data on the tourism consumption of households encompass expenditure from disposable income. With regard to family visits, the TSA solely covers actual spending by visitors or host households, i.e. the value of services such as accommodation services provided free of charge was not estimated. In the case of consumption items lacking information on expenditure, the TSA relies on estimates based on tangible data and information on prices as obtained from the Department of Prices at CSO. It concerned spending on fuel and separate estimates of the value of domestic tourism events.

Owing to the lack of adequate surveys, data on the tourism consumption of households on same-day trips were estimated on the assumption that their number and consumption structure corresponded to the number of short-term trips and that the maximum distance travelled was 200 km. Tourism consumption related to business trips also includes all visits, whether same-day or tourism trips. As concerns the tourism consumption of Polish residents outside the economic territory of Poland, i.e. imports of tourism services, in accordance with the TSA methodology it was described in very general terms and solely for information purposes.

Data on the consumption of non-resident visitors rely on the border surveys of arrivals and expenditure of non-residents (tourists and same-day visitors) carried out by the Institute of Tourism in 2011. The estimation of the number of tourist arrivals for the purposes of the TSA excludes persons declaring the purpose of the trip to be the taking up of casual employment or commercial purchases as well as 'other' types of accommodation. According to the methodology adopted, the figures concerning the demand side of the TSA were prepared as net values, i.e. as separate estimates of the

value of specific service components purchased by tourists in the form of events. The source of information used to estimate the composition of package tours was a survey conducted at travel agencies providing services to non-residents as inbound tour operators, information from the specialist press and data from the supply and use tables for products.

2.3. Tourism supply and employment

The figures on supply used in the TSA for 2011 are based on estimates relying on information regarding tourism output at the division level as provided by the Department of National Accounts at CSO, data on structural statistics of businesses available in the EUROSTAT database (retrieved in the period of January to April 2014) and the 2009 supply and use tables for products and services. As regards data on employment, those are basically derived from economic activity reports filed by entities operating in particular institutional sectors. Such figures only refer to tourism characteristic activities. They concern all entities classified as operators carrying out a specific activity, irrespective of the number of persons employed. The data published were obtained twofold:

- for large entities (with over 9 persons employed): from business reports,
- for small (i.e. other) entities: from estimates made on the basis of data gathered for 2011.

3. Tourism consumption

In 2011 the total tourism consumption within the economic territory of Poland was estimated at PLN 48,563 million, up by 4.6% against 2008. It accounted for approx. 4.0% of domestic consumption. The expenditure of resident visitors (households, spending on business trips and individual part of collective consumption) represented 42.2% of the overall amount. The analysis of consumption by type indicates a prevailing share of expenditure on tourism characteristic products (58%); tourism connected and other products accounted for 27.4% and 14.6% respectively. In the group of tourism characteristic products purchased by all visitors (combined spending by resident or non-resident visitors), expenditure on accommodation services for visitors (whether in hotels, other collective accommodation facilities or private homes/holiday homes) represented the highest share; it accounted for 32.8% of the total value of tourism characteristic products. At the same time, transport services and food and beverage serving services represented 26.2% and 23.2%, respectively, of the consumption of tourism characteristic products.

With regard to spending on tourism connected products, the top item was expenditure on fuel (in 2011 purchases of fuel amounted to PLN 5,991 million, i.e. 45.1% of the consumption of tourism connected products and 12.4% of the total tourism consumption). Expenditure on food, beverages and tobacco products also represented a considerable proportion: 8.1% of the total consumption and PLN 933 million. The comparison of specific consumption components in 2011 and 2008 (the last reference year for the TSA) points to rather significant structural changes, therefore it is of interest to follow the consumption patterns of the main groups of purchasers of tourism services, i.e. non-resident and resident visitors. In 2011 the total expenditure by non-resident visitors for the benefit of Polish economic operators was estimated at PLN 28,072 million. The estimated purchases of tourism characteristic products totalled PLN 13,016 million (i.e. 46.4%), whereas spending on tourism connected and other products and services – PLN 15,056 million (i.e. the remaining 53.6%). It must be pointed out that the share of the latter is very significant, and rising at that. The importance of tourism connected and other products is related to spending by non-resident visitors in connection with acquisitions for their own use, included in tourism expenditure in accordance with the TSA methodology. In 2011 ca. 52.4% of the overall expenditure of non-resident visitors for the benefit of Polish economic operators (whether within the economic territory of Poland or abroad) was attributable to tourist arrivals, whereas the remaining share was generated by same-day trips. The average amount spent by non-resident visitors in connection with inbound trips to Poland and stays in its territory for at least one night (tourists) was higher than in previous years, at PLN 1,310, whereas the average expenditure by same-day visitors was PLN 293.

The 2011 spending by resident visitors within the national territory was estimated at PLN 13,344 million. The amount comprises both expenditure on domestic trips and the share attributable to outbound trips by residents which was paid to domestic economic operators (mostly margins earned by tour operators and revenues of domestic passenger transport carriers). In 2011 tourism characteristic products accounted for the dominant share (65.1%); tourism connected products represented 32.4% and other products constituted 2.5% of the tourism consumption of resident visitors. Broken down by type of products, the most important item of spending was accommodation for visitors (19%), ahead of food and beverage serving services (15%), purchases of food products and beverages (15%) and the acquisition of fuels (10%). It is worth noting that tourism consumption of resident visitors encompasses spending related to various types of trips and different classes of visitors. As demonstrated by the estimates, in 2011 domestic tourism was dominated by expenditure on domestic tourism trips (82%), followed by outbound tourism trips (13%). Other types of trips were much less important.

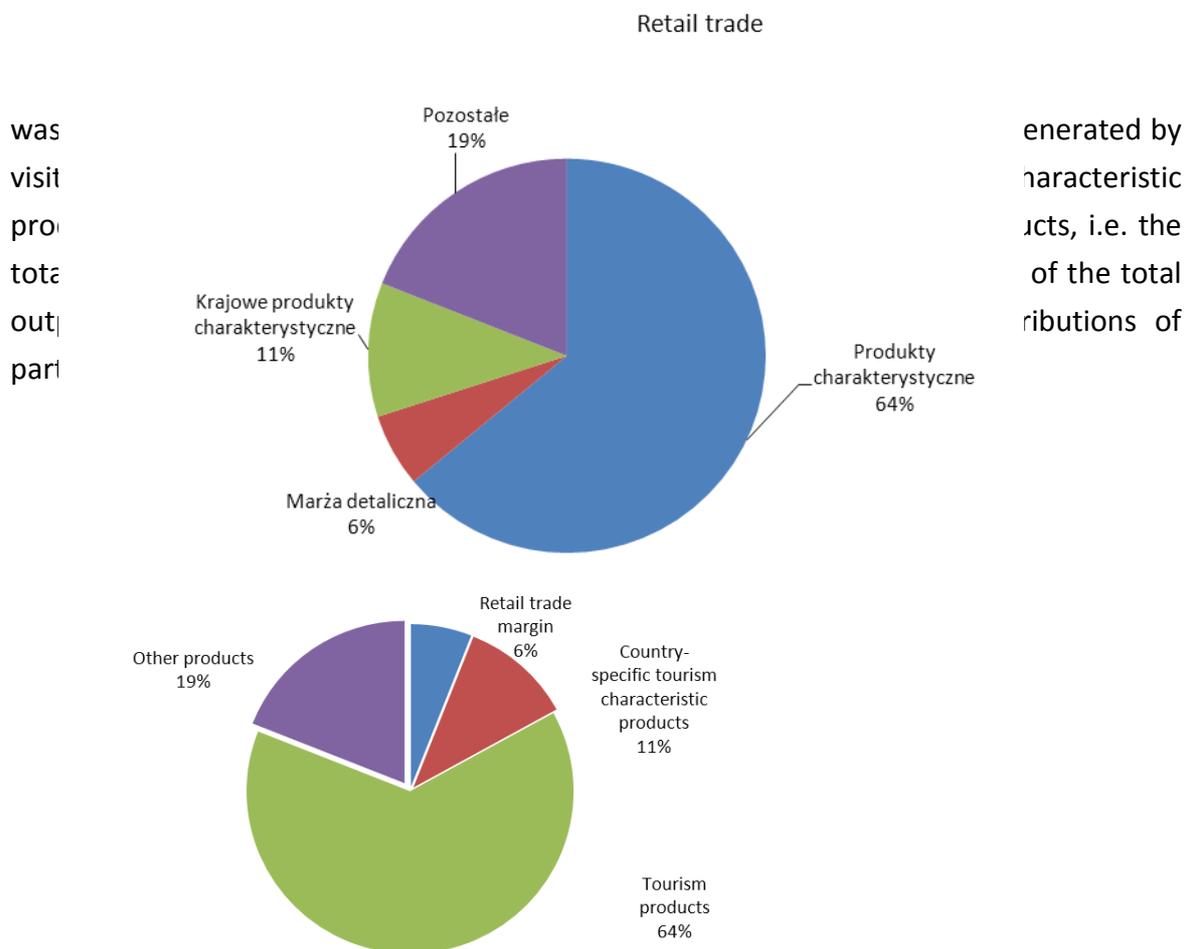
This edition of the TSA offers more insights into the consumption by Polish residents of tourism services abroad. In 2011 the value of such consumption was estimated at PLN 11,032.7 million, accounting for 82.7% of spending by residents within the national territory. When examining the structure of such expenditure by type of products, it is worth highlighting a major share of tourism characteristic products (approx. 87.5%), particularly air transport services and accommodation services for visitors, representing 41.3% and 24.2% respectively of the total expenditure in question. It is worth including in the analysis of tourism consumption the issue of collective consumption, related to expenditure on promotion, information, tourism administration and similar activities. Being a separate category of tourism consumption, although excluded from further TSA analyses, it is undoubtedly a significant economic circumstance. The expenditure in question was established to total PLN 405.7 million in 2011. This category of consumption was dominated by voivodship government budgets, accounting for 47.1% of overall spending. 26.4% of the appropriations for collective consumption were spent at the national level, *poviat* and municipal budgets represented similar proportions. Broken down by purpose, promotional activities accounted for the highest share of expenditure (25.6%); spending on the tourism-related government administration was below 1%.

4. Total tourism output, value added and the contribution of tourism to GDP

4.1. Description of total tourism output and supply of tourism products in 2011

According to the estimates, in 2011 the overall value of tourism output of tourism characteristic products was found to be PLN 68,581.4 million, i.e. 2.16% of the total output in the national economy as a whole. It was clearly dominated by tourism characteristic products (a 90% share), which means that the development of the types of activities in question hinges on visitors' demand, although it must be remembered that even in the case of tourism characteristic products only part of output is actually acquired by visitors.

As regards output directly serving visitors, it comprises the production of tourism characteristic products in tourism characteristic and other activities (where it is secondary output) adjusted by the tourism consumption index, i.e. the ratio of tourism consumption to the supply of specific products (Table 6). The value of output of tourism characteristic products calculated as indicated above totalled PLN 25,927.4 million, with a 0.8% share of output at basic prices in the national economy as a whole. However, it



According to the data shown in the figure, tourism characteristic activities generated a major share (64%) of the supply of products acquired by visitors. Those were followed by products constituting outputs of other activities (19%), ahead of country-specific tourism characteristic products.

Tourism output increased by the value of net indirect taxes and other types of indirect taxes (excise duty in the case of tourism products) determines the level of tourism supply at purchaser prices. In 2011 it was PLN 44,661.0 million, i.e. 1.4% of the value of commercial products and services. Therefore, it was slightly higher than the share in output, which resulted from the relatively high proportion of excise duty levied on products acquired by visitors, i.e. on fuels, alcoholic and tobacco products.

4.2. Description of the contribution of tourism to value added and GDP

The output of tourism characteristic activities and the efficiency of production processes in businesses operating in such industries largely determine the assessment of the contribution of tourism to value added in the national economy. Value added generated by tourism characteristic activities was PLN 34,554.9 million, accounting for

2.6% of value added generated in the national economy as a whole in 2011. The comparison of both values shows that the capacity of tourism characteristic activities to generate value added was above the average for the national economy (the share of value added in output was 50.4% for tourism characteristic activities and 42.5% for the economy as a whole). The most value added was generated by: tourism connected activities as well as the renting and leasing of cars (with shares of value added at 71% and 70% respectively). Accommodation services for visitors performed slightly better than the average for all tourism characteristic activities – 54%.

As in the case of output, only part of that value added is directly attributable to tourism, subject to an adjustment by the tourism consumption index. Established using the method described above, tourism value added generated by tourism characteristic activities was PLN 13,193.13 million, representing ca. 1% of value added generated in the national economy. Total tourism value added estimated, taking account of the tourism output of other divisions, amounted to PLN 20,007.03 million. It accounted for 1.5% of value added generated in the economy as a whole. In the group of tourism characteristic activities, accommodation services for visitors as well as food and beverage serving services contributed the most to the generation of value added. It is also worth noting the considerable share of service activities incidental to air transport, classified as country-specific tourism characteristic activities.

Tourism value added determines the contribution of tourism to GDP. Increased by the value of net indirect taxes of PLN 4,312.4 million, the overall tourism contribution amounted to PLN 24,319.5 million, constituting 1.6% of GDP.

Although the value is lower than those reported in the previous editions of the TSA, it is difficult to make direct comparisons on account of the amendments to the methodology. Nevertheless, it must be emphasised that the proportions between contributions to tourism value added by tourism characteristic activities and by other activities had changed. The contribution has clearly augmented, which reflects shifts in the composition of tourism consumption in Poland, i.e. a downward trend in the share of acquisitions of products in tourism expenditure.

5. Labour force in tourism activities in 2011

The actual employment serving tourist traffic in 2011, estimated using the tourism value added (TVA) indicators was below 138,000 persons, with the self-employed accounting for 15% of that number (nearly 21,000). Operators with more than 9 persons employed represented 67% of the total employment, which means that in 2011 they

created twice as many jobs as micro-enterprises (33%). The above relationship had remained almost unchanged for a decade.

Invariably, the largest employer of all tourism characteristic activities (adjusted by the TVA indicators) remained the group of accommodation facilities for visitors (nearly 44,000 persons employed, representing 32% of the total employment in tourism characteristic activities). It was closely followed by establishments providing food and beverage serving services, with over 40,000 workers (30% of employment in tourism characteristic activities). Another major employer in the tourism sector is passenger transport: passenger land transport accounted for 18% of jobs in tourism characteristic activities, whereas employment in the whole passenger transport industry exceeded 20%. Sports, amusement and recreational activities employed slightly more than 5% of tourism workers (fewer than 6,500 persons serving tourist traffic). Travel agencies accounted for a mere 7% of the total employment in tourism characteristic activities (below 10,000). It is worth stressing, however, that for several years the value had been steadily, even if slowly, improving (in terms of both the number of operators and jobs created).

Tourism self-employment generated 15% of jobs (nearly 21,000) in 2011. As in previous years, the highest share of own-account workers (42%) was found in food and beverage serving establishments, half the number (21%) worked in accommodation facilities for visitors. In 2011 travel agencies represented 14% of the total number of owners, co-owners and contributing family members working in tourism characteristic activities. But the above indicators must be analysed in combination with information on the number of businesses in specific tourism activities. For instance, in the case of restaurants and bars the number of enterprises jumped by more than 38,000, whereas that of accommodation facilities for visitors went up by nearly 12,000. In this context, slightly over 6,000 travel agencies must be regarded as an important group in terms of self-employment, which is a recurring trend from previous years.

The number of women workers serving tourist traffic was almost 77,000, accounting for ca. 56% of the total employment in tourism characteristic activities in 2011 (the indicator was above the national average, i.e. 46% of female employment in the economy as a whole). Women dominated in all activities unambiguously associated with tourism: in 2011 they constituted 65% of all workers in hotels and other accommodation facilities for visitors, closely followed (64%) by food and beverage serving services. They also accounted for a significant share of employment in other tourism activities, mainly travel agencies (64%). In 2011 the most important employers for women (in absolute terms) in tourism characteristic activities were food and beverage serving establishments (over 26,000 female workers) and accommodation facilities for visitors (more than 28,000 jobs).

As regards the proportion of own-account female workers in individual tourism characteristic activities in the total number of self-employed women engaged in tourism characteristic activities, the highest share was found in food and beverage serving services (50% of own-account female workers in tourism characteristic activities). Lower shares of self-employed women characterised accommodation facilities for visitors and travel agencies (25% and 15% respectively).

The composition of tourism employment by sex differs from that for the economy as a whole. In 2011 the share of women in total employment, employees and the self-employed in the whole national economy was 46%, 47% and 49% respectively. As for female employment in tourism characteristic activities (adjusted by the TVA indicators), the corresponding figures were 56%, 58% and 44%. It means that tourism favours women workers more than other economic activities.

In 2011, the largest groups of both women and men running their own tourism businesses were found in food and beverage serving services and accommodation services for visitors, although there were slightly more women than men in the two types of activities. The numbers of men and women running independent travel agencies were very similar as well (more or less 50% each). At the same time, there were considerably more self-employed men than women in all modes of transport, but with an insignificant total number of own-account workers (below 3,300 self-employed persons in tourism characteristic activities).

6. Fixed capital formation in tourism characteristic activities in 2011

6.1. Fixed capital formation

In accordance with the TSA methodology, it is assumed that tourism activities are the principal activities in five sections: H, I, N, R and S¹. In 2011 investment in buildings and structures, means of transport and other fixed assets, including land improvements, amounted to PLN 14.8 billion in tourism characteristic activities, i.e. 6.1% of total fixed capital formation².

In 2011 two groups of tourism characteristic activities dominated in fixed capital formation: sports activities (25.8%) and other passenger land transport (24.3%) . Fixed capital formation in sports activities (PLN 3.9 billion) mostly concerned investment in buildings and structures (pitches, stadiums, etc.), whereas that in other passenger land transport (PLN 3.6 billion) represented investment in the acquisition of means of transport

¹ *Polska Klasyfikacja Działalności* / Polish Classification of Activities. Warsaw CSO 2007.

² *Środki trwałe w gospodarce narodowej w 2011 roku* / Fixed capital in the national economy in 2011, Warsaw, CSO 2012.

(mainly for road transport) and investment in buildings and structures (roads) in 64% and 28% respectively.

As regards the group of hotels and accommodation facilities for visitors, in 2011 698 units with a cubic capacity of 2,099,000 m³, including 283 hotels, were put into use (as new investment projects or units after extensive renovation). In 2011 the construction and assembly output in the group of hotels and other accommodation facilities for visitors completed under contracts by building contractors with more than 9 persons employed was PLN 955.5 million (4.8% more than in the previous year), including investment works worth PLN 690.6 million.

At the same time, in 2011 2,220 building permits were issued in Poland in respect of the construction of hotels and other accommodation facilities for visitors, with a usable area of 627,400 m².

Table 6.1 Hotels and other accommodation facilities for visitors put into use in 2010–2011

Specification	2010	2011
Number of hotels and other accommodation facilities for visitors	587	698
Number of hotels	328	283

Source: *Budownictwo – wyniki działalności w 2011 r.* / Construction – performance in 2011, Warsaw CSO 2012.

The presented information concerned collective accommodation facilities. As regards individual accommodation facilities, the TSA only covers the so-called second homes. From 2001, that group of facilities comprises the category *Summer homes, holiday homes and country mansions* in rural areas. In 2011 2,073 facilities with a total cubic capacity of 647,800 m³ were put into use (down by 10.5% on the previous year and down by 6.0% against 2009).

Table 6.2 Estimates of selected indicators for summer homes, holiday homes and country mansions in 2009–2011

Specification	2009	2010	2011
Output of homes put into use in PLN million	224.2	147.2	132.1
Number of homes put into use	2,205	2,315	2,073
Cubic capacity in thousand m ³	804.5	527.3	647.8

Source: *Budownictwo, wyniki działalności* / Construction – performance. Warsaw CSO 2010–2012.

In 2008³ investment in means of transport in the air transport industry amounted to ca. PLN 138.4 million. Total fixed capital formation in air transport was PLN 158.9 million in 2008. In 2013 the only available data were figures on fixed capital formation by PLL LOT, a total of PLN 25.0 million⁴

In 2011 companies providing scheduled air transport services in Poland had 54 airliners (56 in 2010). In 2011 and 2010 airports respectively recorded 326,900 and 314,700 take-offs and landings of passenger airplanes, respectively carrying 6.49 million and 4.99 million passengers⁵.

6.2. Gross fixed capital stock in tourism characteristic activities in 2011

In 2011 the gross value of fixed capital, encompassing produced non-financial assets (e.g. buildings and structures, means of transport, machinery, technical equipment and tools) in tourism characteristic activities (excluding the value of land and second homes), was PLN 72.1 billion (up by 7.1% on the previous year), accounting for 2.7% of the gross fixed capital stock in the national economy (at current book-keeping prices).

The following can be distinguished in tourism characteristic activities: accommodation facilities for visitors (PLN 17.6 billion), of which buildings and structures constituted 92.4%; sports activities (PLN 14.9 billion), dominated by buildings and structures (94.4%), other passenger land transport (PLN 12.7 billion) and food and beverage serving services (PLN 7.1 billion).

It is worth noting the major share of transport (PLN 23.7 billion), accounting for a total of 32.9% of the gross value of fixed capital in all tourism characteristic activities.

The gross fixed capital stock indicated above excludes the value of land. Neither does it comprise the value of holiday homes.

7. Final remarks

The full version of the TSA prepared for 2011 is a follow-on to the work started in the mid-1990s, but it contains certain vital changes as compared to the previous editions:

- it is the first estimation of the TSA applying a revised methodology and new classifications of activities as well as of products and services;
- it attempts to reduce the time lag between the reference year and the year of drawing up the TSA.

³ The last available data

⁴ Source: *Pakiet informacyjny dla akcjonariuszy PLL LOT S.A.* / Information package for the shareholders of PLL LOT S.A., Warsaw, June 2013

⁵ In 2011 the total number of passengers of domestic and foreign carriers enplaned and deplaned at Polish airports was 21.9 million.

As regards the former difference, it must be emphasised that the new classifications are better suited to the TSA needs. Regrettably, the improved alignment of the structure of supply data with the TSA needs does not involve a shorter period between the time of obtaining such data and the reference year. This edition of the TSA relies on partly aggregated final data on the reference year, subject to subsequent separate estimations on the basis of structural business statistics of EUROSTAT. Data from both sources proved to be largely inconsistent, therefore the supply figures presented herein must be treated as estimates. Thus, it is doubtful whether it is possible to shorten the aforementioned time lag, particularly that the structural business statistics are not published on a regular basis.

The new structure of the TSA allows a better assessment of the phenomenon of tourism in individual countries. On the one hand, there is a separate module shared by all countries (tourism characteristic activities); on the other hand, it is possible to comprehensibly introduce products and activities important to specific countries. The TSA for 2011 attempts to achieve the aforementioned goals, although the task could not be fully completed owing to the lack of certain data.

Similarly, as in the previous editions, there was a problem of lacking data on consumption. A full implementation by Poland of the recommendations by the European Commission from 2015 should improve the situation, even though there will continue to be methodological issues concerning data on business trips. Those stem from difficulties in capturing this group of visitors in standard household surveys as well as from the absence of sufficient information regarding expenditure on training and business services related to such trips.

The results of this TSA edition are not fully comparable with those for previous years. It results from the changed classifications of activities and the different scopes of analysis within the TSA. On the one hand, certain activities were introduced; on the other hand, wholesale trade margins were excluded, in accordance with the recommendations of the revised methodology. Consequently, the estimated contribution of tourism to GDP is lower than estimates for the previous years, whereas the role played by tourism characteristic activities is greater. It is also worth bearing in mind that the contribution may be underestimated owing to the above-mentioned problems with obtaining appropriate data on the demand and supply sides of tourism.