POLAND
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%.

1 in 4 net new jobs were created by Travel & Tourism over the last five years.

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0.5%</td>
<td></td>
</tr>
<tr>
<td>Automotive</td>
<td>3.0%</td>
<td></td>
</tr>
<tr>
<td>Agriculture</td>
<td>2.5%</td>
<td></td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>4.7%</td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td>14.0%</td>
<td></td>
</tr>
<tr>
<td>Financial Services</td>
<td>6.0%</td>
<td></td>
</tr>
</tbody>
</table>

All values are in constant 2019 prices & exchange rates
As reported in March 2020

POLAND 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

4.7% OF TOTAL ECONOMY
Total T&T GDP = PLN106.5BN (USD27.6BN)

+4.0%
2019 Travel & Tourism GDP growth vs +4.0% real economy GDP growth

CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

811.8 JOBS (000's)
(5.0% of total employment)

INTERNATIONAL VISITOR IMPACT

PLN55.3BN
in visitor spend (4.4% of total exports)
(USD14.3BN)

INBOUND ARRIVALS

1. GERMANY 25%
2. UNITED KINGDOM 8%
3. UKRAINE 6%
4. UNITED STATES 5%
5. ITALY 4%
REST OF WORLD 52%

OUTBOUND DEPARTURES

1. UNITED KINGDOM 11%
2. ITALY 8%
3. UKRAINE 7%
4. GERMANY 6%
5. SPAIN 5%
REST OF WORLD 63%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)

- LEISURE SPENDING 66%
- BUSINESS SPENDING 34%
- DOMESTIC SPENDING 31%
- INTERNATIONAL SPENDING 69%

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