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State, Development, and Prospects before and during the COVID-19 Pandemic

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ABSTRACT

The aim of the study was to show tourist movement in Poland and its importance in the tourism and national economy. The analysis of the results confirms a several-year trend of further increases in the number of arrivals for both foreigners and foreign tourists. In parallel to the positive trend in terms of the number of trips, unfortunately a decreasing trend is observed in the level of average spending of tourists and one-day visitors. Therefore, total revenue from inbound foreign tourism in 2019 (calculated in PLN) increased by 2.9% compared to its level from the previous year. Tourism, including foreign tourism arrivals, affects economic development, mainly due to the multiplier effect. The huge problem for the Polish tourism sector was the COVID-19 pandemic in 2020. The aim of the article is to illustrate the impact of the pandemic on the tourism sector in Poland, especially domestic travels, and to provide information on which types of tourism were more resistant to the COVID-19 pandemic situation.

Keywords: tourist GDP, domestic travels, COVID-19 pandemic

Introduction

The tourism economy can contribute significantly to the improvement of economic, territorial, and social cohesion in Poland (Gaworecki, 2013). Sustainable development of the high-quality tourism sector is one of the directional development priorities of the European Union. This raises the challenge of strengthening the economic and social potential conducive to the growth of the tourism sector, understood as an element of the economic competitiveness of regions. Tourism is a factor in the diversification of the economy, creating the demand for qualified staff, innovative services, and modern management tools as well as research and analyses supporting sustainable economic development based on tourism. All this creates new opportunities to view the development of tourism as part of a regional policy that strengthens the competitiveness of a given territory.

The system of national accounts in individual countries is the basic and commonly used tool for measuring the effects of all sectors of the economy. It enables the observation of processes taking place in the entire economy at the stage of production, generation, and distribution of income, and showing the state of the economy at the end of the analyzed period. Unfortunately, national accounts do not show the real contribution of tourism to value-added processes, government tax revenues, gross domestic product (GDP), or job creation, etc.

The main reason is that tourism is not one branch of the economy clearly separated on the supply side. The tourist package usually consists of several products manufactured in various sectors, such as hotels, restaurants, transportation, culture, and recreation amongst many others. Therefore, it is easier to define tourism on the demand side (i.e., to determine the value of tourism goods and services purchased in a given year). Measuring the economic impact of tourism-related activities based solely on the supply-side approach of the Standard System of National Accounts significantly underestimates tourism's real economic performance and thus

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weakens its position relative to other sectors of the economy.

The impact of tourism on the development of the national economy is analyzed in two ways (Klimek, 2010). On one hand, there is the concept of the "tourism industry" defined as "tourism in the narrow sense." These are the expenses incurred by tourists and travelers for goods and services directly related to tourism. Those taken into account include expenses for hotels, restaurants, and travel agencies, to name a few. On the other hand, the concept of "tourism economy" includes expenses not only directly related to tourism, but also indirectly (i.e., those that would not be incurred if it were not for tourism, such as expenses incurred by tourists and travelers for transport, food, fuel, insurance) (Kurek, 2007). Indirect effects of tourism's impact on the economy result primarily from the activation of industries not directly related to tourism (e.g., agriculture, construction, rail transport, and many others), as well as those parts of GDP and employment share that would not exist if it were not for the link between these industries and tourism (Panasiuk, 2006). The development of tourism monocultures is often observed in island territories (Jędrusik, 2019).

Tourism is an important part of the Polish economy. The share of the tourism economy in GDP terms remained at 5 to 6% between the years 2014–2019, with employment estimated at around 580–760 thousand people (4.7% of the total number of employed persons). Of these, approximately 170–200 thousand people are employed in activities related to accommodation and catering services. The revenues from the arrival of foreigners in Poland amounts to EUR 8–9 billion annually, of which approximately half are revenues from the arrivals of foreign tourists.

Tourism is an important and modern sphere of economic activity and at the same time, a sphere of social activity. Tourist activity is one of the measures of the inhabitants' standard of living and an indicator of the civilizational development of societies. The development of tourism is an important impulse dynamizing the socioeconomic development of the country. Its significance manifests itself in its high ability to generate new jobs, improve the quality of life of local communities, and increase the competitiveness of regions. At the same time, tourism contributes to discovering the most valuable cultural and environmental resources, the exposure of which improves the internal and external image of the country, regions, and towns. While maintaining the appropriate approach, the development of tourist functions, drawing the attention of local communities to the most important natural and cultural assets, will contribute to the preservation of traditional values and sustainable development, which is not only connected with eco-certification. However the year 2020 was much different for the tourism sector. The COVID-19 pandemic resulted in huge problems for the tourism sector around the world. International tourism travels were especially affected. According to Chang et al. (2020), who checked the metropolitan region of selected cities of the United States, high level of transmission of COVID-19 virus is connected with gastronomy. Bhaskara and Filimonau (2021) and Brouder (2020) underlined that the negative implications of the pandemic are particularly shown in popular tourism destinations.

The aim of the article is to show the importance of tourism in the Polish economy and to show the changes in tourism movements during the first stage of the COVID pandemic in the first half of 2020.

Literature Discussion

Tourist travels are responsible for developing the local economy and have a positive impact on the balance of payments of individual countries. Capital flows in, new jobs are created, local businesses record higher turnover, whereby local income and tax revenues were increasing for the last decade all over the world. The exception was 2020—the COVID-19 pandemic year. The economic situation in normal years was stimulated in other sectors, such as construction, agriculture (Niemczyk & Seweryn, 2008, p. 259). The positive effects of tourism on the economy were demonstrated in many studies (Kim et al., 2006, p. 926; Balaguer & Cantavella-Jorda, 2002; Dwyer & Forsyth, 1993; Dwyer et al., 2004). The growing importance of tourism resulted in the boosting role of the tourism multiplier effect. A high correlation between foreign tourists' expenses and economic growth was shown, as well as exchange rate relations and the tourism multiplier effect (Dritsakis, 2004, pp. 305–306). According to Škare et al. (2020), pandemic crises have a

very long negative impact on the tourism industry and economy. The COVID-19 pandemic devastated the global economy and tourism industries. Sigala (2020) was indicating that the COVID-19 pandemic resulted in numerous sociocultural, economic, and psychological impacts on various tourism industries (p. 312). Kreiner and Ram (2020) showed that many countries implement short-term local solutions, usually focused on inbound tourism. A very important issue was to observe tourism movement in metropolitan areas and challenges connected with crowding and impacts of overtourism in public spaces (Jiricka-Pürrer et al., 2020). According to Altuntas and Gok (2020), the quarantine decisions were the most devastating decisions affecting the tourism industry during the COVID-19 pandemic. The example of Turkey illustrated that regions suffer because of quarantine decisions directly, and it results in a decrease of the country's tourism economy (p. 6). Uğur and Akbıyık (2020) revealed that the tourism sector is very sensitive, and it is usually affected by global crises. The COVID-19 crisis showed the rapid decisions of travelers, who canceled or delayed their trips while they heard the news and changes of regulations connected with pandemic restrictions. The different types of reaction of tourism industry were demonstrated in the book by Dzieidzic (2012), and the reaction of the Polish tourism economy on the global economic crisis was presented by Dziedzic et al. (2009).

Domestic Departures of Polish Residents

In Poland in 2019, tourism economy was responsible for 6% of GDP (Ministry of Development, Labour and Technology). According to the estimates of the Ministry of Development, in 2019, Poles took part in 50 million domestic tourist trips, including 20 million long-term trips and 30 million short-term trips. The share of long-term trips in total domestic trips amounted to 40%, and short-term trips, 60%. The structure of domestic tourist trips has not changed for many years. In Poland, the share of the tourism economy in GDP fluctuated slightly between 2012 and 2018, but remained at a high level, contributing to GDP at a level of approximately 5 to 6%. In 2013 it amounted to 6.1%, and in 2014 to about 5.2%—with a simultaneous decline in revenues from the tourism economy. In the period analyzed, the highest revenues from the tourism economy were registered in 2018 (they amounted to PLN 124.6 billion) and in 2017 (PLN 116.7 billion). In 2018, expenditure in the tourism economy amounted to PLN 26.5 billion more than in 2012.

It should be emphasized that the above decreases and fluctuations in 2012–2018 were the result of economic changes. Tourism is a sector very sensitive to economic changes—that is why stimulating and implementing investment activities that ensure its continuity of development are so important for its development (Panasiuk, 2014). At the same time, tourism in the Polish economy is beginning to be perceived as a significant and dynamically developing sector. According to WTTC forecasts, Poland faces the prospect of developing the tourism sector, so that the share of the tourism economy is at the level of 5.5% of GDP—an increase from PLN 124.6 billion to over PLN 144.9 billion (in 2028) (*Travel & Tourism Economic Impact 2018 Poland,* 2018). This proves the significant potential of this sector in stimulating the growth of Poland's GDP in the following years. Tourism is also very fragile not only during economic crises but also in health threats. This is why the COVID-19 pandemic resulted in a huge economic decrease in Polish tourism economy.

The average length of stay during domestic trips in 2019 did not change significantly compared to the level recorded in previous years. In the case of long-term travel it was approximately 8.3 nights, compared to two nights in the case of short-term travel. Comparing the first half of the year 2020 to the first half of the year of 2019, a huge decrease in the number of nights during domestic trips of Poles can be observed. There was a 35% decrease in the total number of nights spent by Polish residents both long-term, a decrease by 36%, and short-term by 34% (Table 1).

The aims of domestic long-term travel during the first half of the year 2020 were very similar to the first half of the year 2019. A slight decrease in travels connected with health reasons was recorded from 7.7% in the first half of 2019, to 6% in the first half of 2020 (Table 2).

Analyzing the type of organization of domestic long-term trips (during the COVID pandemic, it can be observed that in the first half of 2020, less than 1.5% of travel was organized completely by a travel

Table 1. Number of Nights during Domestic Trips of Poles Aged 15 and Older (million)

Description	2017	2018	2019	First half of 2019	First half of 2020
Long-term	159.6	166.8	173.3	49.8	31.6
Short-term	54.8	58.0	60.6	28.6	18.7
Domestic total	214.4	224.8	233.9	78.4	50.3

Source: Based on Central Statistical Office data—www.stat.gov.pl.

Table 2. The Aims of Domestic Long-term Travel (in %)

Description	2017	2018	2019	First half of 2018	First half of 2019	First half of 2020
Tourism and leisure	57.8	58.2	59.0	46.6	47.7	48.8
Visiting friends and relatives	31.6	31.5	31.1	38.7	38.7	38.1
Business	2.4	2.5	2.3	4.0	3.6	4.2
Health	6.1	6.0	5.8	8.3	7.7	6.0
Religious	0.5	0.5	0.4	0.3	0.3	0.2
Other	1.5	1.4	1.4	2.3	2.1	2.6

Source: Based on Central Statistical Office data—www.stat.gov.pl.

agent. A higher percentage of people were traveling independently (89.2% in the first half of the year 2020 compared to 87% in the first half of 2019). The decrease of the percentage of people partly or completely using a travel agency, a workplace, or other institution was also recorded (Table 3).

According to Table 4—when observing the type of accommodation used during long-term domestic trips, it can be observed that there is a large increase in the percentage of people staying with friends and relatives. Comparing the first half of 2019 (40%), to the corresponding period in 2020 (61.7%), it was 21.7 percentage points more in 2020. People were also resigning from traveling during long-term trips to hotels (10.5%), compared to 14.3% in the first half of 2019, and from staying in pensions—15.1% in the first half of 2020 compared to 15.4% in the first half 2019. This was because of the "lockdown" in Poland. The epidemic was introduced on March 22. On April 20, the first stage of lifting restrictions began. On May 18, the third stage of lifting the restrictions took place, and the operation of hairdressing and beauty salons was restored. Restaurants, bars, and cafes restored operation after meeting sanitary

Table 3. The Type of Organization of Domestic Long-term Trips (in %)

Description	2017	2018	2019	First half of 2018	First half of 2019	First half of 2020
Totally travel agent	1.6	1.7	1.9	1.9	2.0	1.5
Partly a travel agency	0.8	0.8	0.8	0.9	0.9	1.0
Completely a workplace or other institution	5.6	5.6	5.1	6.7	6.4	5.3
Partly a workplace or other institution	3.7	3.4	3.2	4.0	3.6	3.0
Independently	88.2	88.5	89.0	86.4	87.0	89.2

Source: Based on Central Statistical Office data—www.stat.gov.pl.

Table 4. Type of Accommodation during Long-term Domestic Trips (in %)

Description	2017	2018	2019	First half of 2018	First half of 2019	First half of 2020
Hotel, motel, inn	10.8	11.0	12.1	13.1	14.3	10.5
Pension	15.1	15.0	15.5	15.0	15.4	15.1
Private accommodation for rent	13.9	14.5	14.8	9.5	10.1	11.6
Sanatorium or other medical facility	5.2	5.4	5.4	6.7	7.0	5.7
Living with relatives or friends	35.3	34.9	33.5	42.3	39.9	44.9
Second house, holiday apartment, others	4.3	4.0	4.0	3.0	2.9	3.4
Other	15.4	15.2	14.7	10.4	10.4	8.8

Source: Based on Central Statistical Office data—www.stat.gov.pl.

guidelines. At the end of May 2020, the fourth stage of canceling the restrictions took place, and the limits on people in the trade and catering industry were lifted. There was a limit of people, gatherings, and weddings of up to 150 people. On June 6, 2020, cinemas, theatres, operas, swimming pools, fitness clubs, amusement parks, saunas, and solariums were opened. On August 8, 2020, the Ministry of Health recognized the so-called "red zones" (communities with big restrictions), "yellow zones" (communities with average restrictions), and "green zones" (communities with without restrictions). This is why people were choosing to stay with friends and relatives (44.9%) in the first half of 2020 compared to 39.9% in the first half of 2019. They were also choosing the second house and holiday apartments (3.4% in the first half of 2020 compared to 2.9% in the first half of 2019).

The main type of transport used during domestic long-term travel in the first half of 2020 was a little bit different than the previous years. First of all, more people used private or rented cars (81.4%) in first half of the 2020 compared to 75.6% in the first half of 2019. People were avoiding railway, bus, and coach, whereby a decrease was recorded in these modes of transport (Figure 1).

In 2019, Poles mostly went on long trips for tourist purposes (approximately 59%). They often visited relatives and friends (31.1%), while the share of business trips was only 2.3%. The aim of domestic travels in the first half of 2020 were similar to the first half of 2019. In the first half of 2020, almost 34% of travels were tourist and leisure-based, a little higher for the purpose of visiting friends and relatives (56.3% compared to 55.9% in the first half of 2019), business purposes (4.5%), health (2.3%), and religious purposes down a little than in the first half of 2019 (0.6% compared to 0.9%).

The organization of domestic trips of Poles was a little different during the COVID-19 pandemic. More people were traveling independently—93.1% in the first half of 2020 compared to 91.7% in the first half of 2019. Fewer people were also using travel organized completely or partly by a travel agent, or completely or partly by a workplace or other institution (Table 7).

In 2019 it should be noted that Polish residents used the services of travel agencies to a small extent when organizing holiday and vacation trips (in total about 2.7%). The role of the workplace has stabilized at a slight level in the organization of departures. Self-organized trips still dominate (approx. 89%).

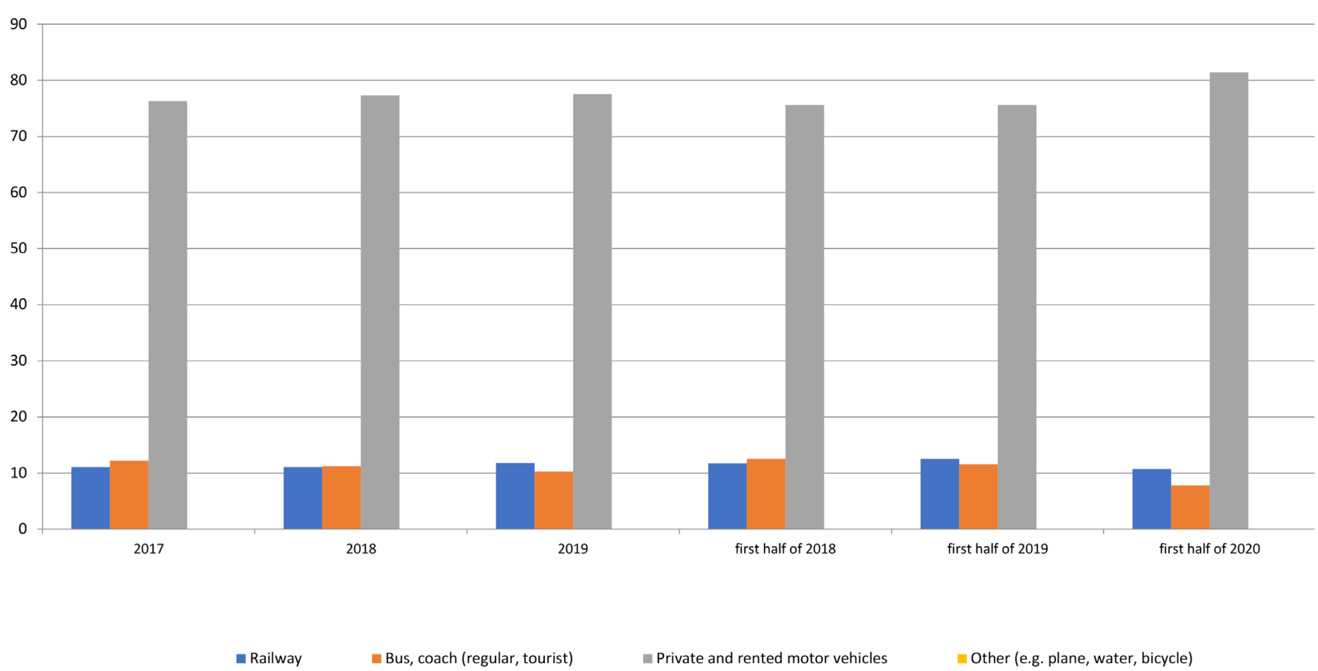

Figure 1. The main type of transport used during domestic long-term travel (in %).
Source: Authors' elaboration based on Central Statistical Office data—www.stat.gov.pl.

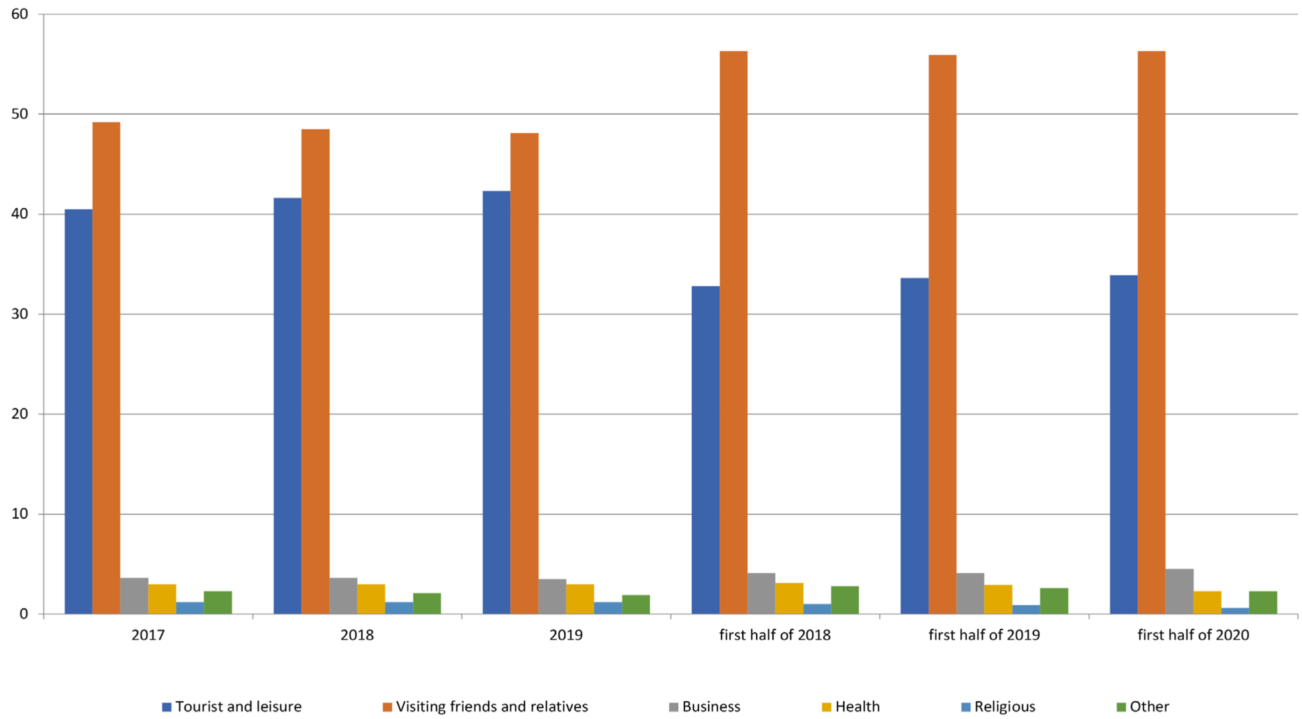

Figure 2. The aim of domestic travel (in %).
Source: Own elaboration based on Central Statistical Office data—www.stat.gov.pl.

Table 5. Organization of Domestic Trips in Total (in %)

Description	2017	2018	2019	First half of 2018	First half of 2019	First half of 2020
Totally travel agent	1.0	1.0	1.1	0.9	1.0	0.6
Partly a travel agency	0.4	0.4	0.4	0.4	0.4	0.4
Completely a workplace or other institution	4.7	4.8	4.7	4.8	4.8	3.8
Partly a workplace or other institution	2.3	2.2	2.1	2.3	2.2	2.0
Independently	91.6	91.5	91.7	91.6	91.7	93.1

Source: Based on Central Statistical Office data—www.stat.gov.pl.

Table 6. Type of Accommodation during Domestic Trips in Total (in %)

Description	2017	2018	2019	First half of 2018	First half of 2019	First half of 2020
Hotel, motel, inn	11.5	12.1	13.4	13.3	14.8	12.0
Pension	9.6	9.7	10.1	8.5	8.9	8.3
Excursion house, hostel, youth hostel, riverside hostel	2.1	2.1	2.0	2.0	2.0	1.1
Training and recreation center, holiday home, holiday home, summer camp	2.5	2.6	2.7	1.9	2.1	1.3
Private accommodation for rent	8.5	9.4	9.8	6.1	6.6	6.9
Agritourism lodging	1.8	1.8	1.9	1.4	1.5	1.4
Camping, camping site	1.5	1.5	1.3	0.7	0.7	0.6
Tourist cottage, bungalow	2.0	1.9	1.9	1.1	1.1	1.0
Sanatorium or other medical facility	2.2	2.3	2.3	2.1	2.3	1.8
Means of transport (e.g., ship, train, car, coach)	0.2	0.2	0.2	0.2	0.1	0.1
Other rented accommodation places	0.3	0.3	0.3	0.3	0.3	
Living with relatives or friends	53.4	52.1	50.0	59.2	56.4	61.7
Second house, holiday apartment	3.4	3.4	3.4	3.1	3.0	3.1
Other non-rented accommodation (own tent, sailboat, 'under the clouds')	0.8	0.7	0.7	0.4	0.4	0.2

Source: Based on Central Statistical Office data—www.stat.gov.pl.

Table 7. The Main Type of Transport Used during Domestic Trips in Total (in %)

Description	2017	2018	2019	First half of 2018	First half of 2019	First half of 2020
Air	0.2	0.2	0.2	0.3	0.3	0.3
Water	0.0	0.0	0.0	0.0	0.0	0.0
Railway	9.0	9.5	10.1	10.1	10.3	8.7
Bus, coach (regular, tourist)	13.9	13.1	12.1	13.8	13.4	9.3
Private and rented motor vehicles	76.5	76.8	77.3	75.6	75.8	81.4
Other (e.g., bicycle)	0.3	0.3	0.3	0.2	0.2	0.2

Source: Based on Central Statistical Office data—www.stat.gov.pl.

During national long-term trips, Poles most often used the apartments of friends and relatives (33.5%). Accommodation in guesthouses (15.5%) and private accommodation (14.8%) were quite popular.

During both long and short trips, the car is used more and more often as a means of transport (77.5% and 77.1%, respectively), and public means of transport such as bus and coach are very popular (respectively: 10%, 3%, and 13.2%). Rail transport also plays an important role (about 11.8% and 9%), while air, water, and other transport (e.g., bicycle) play a negligible role in both types of trip. In the first half of 2020, the car was used significantly more often—in 81.4% of travels compared to 75.8% in the first half of 2019. Less use of railways, buses, and coaches was recorded compared to the first half of 2019.

The intensity of domestic tourist movement varies depending on the voivodeship. A slight difference between the number of trips and visits indicates that tourists go to the destination voivodeship without visiting intermediate voivodeships. The most frequently visited voivodeships were: Pomorskie (13.8%), Małopolskie (13.6%), Mazowieckie (11.8%), Zachodniopomorskie (11.4%), Dolnośląskie (7.4%), as well as Śląskie and Podkarpackie (5.8% each). The least visited voivodeships in 2019 were Opolskie (1.2%), Lubuskie (2%) and Świętokrzyskie (2.4%). Comparing the intensity of tourism movement between voivodeships during the first half of 2020 compared to the first half of 2019, it can be observed that there was a huge decrease in long-term travels—especially to Opolskie (−46%), Podlaskie (−46%), and Kujawsko-pomorskie (−39%). During the COVID-19 pandemic in the first half of 2020, the most visited were Małopolskie, Mazowieckie, Dolnośląskie, and Pomorskie. The least visited voivodeships during these times were: Świętokrzyskie, Lubuskie, and Łódzkie.

Expenditure of Polish Residents on Domestic Tourist Trips

In 2019, the average expenditure of Poles on domestic trips increased in the case of expenditure on long-term trips from PLN 968 to PLN 1,012, in the case of short-term trips—from PLN 327 to PLN 352. The main share in expenditure during long trips is spent on accommodation (37.6%), and during short trips, on food (30.4%). The structure of average expenses on domestic travel per day in the first half of the 2020 illustrates an increase of all expenditures compared to the previous period of 2019. The expenditures of transport were higher by 35%, on food and drinks higher in cafes and restaurants by 2%, and expenditures in other expenses by 20%. Only expenditures per day on accommodation were lower by 5% (Table 8).

According to the estimates of the Ministry of Development, in 2018 the expenses of foreigners in Poland amounted to PLN 61.1 billion and were 71.1% higher compared to 2012. The expenses of Polish residents on domestic travel in 2012–2018 were at the level of PLN 16.4–32.9 billion and were subject to significant fluctuations. Poles' expenditures on foreign travel in the analyzed period amounted to PLN 12.1 billion in 2016, to PLN 15.1 billion in 2018. The highest increase was recorded in 2018, and in 2017—PLN 13.6 billion. In the years 2012–2018, business travel expenses fluctuated; they reached almost PLN 17 billion in 2018. State expenditure on tourism remained unchanged—over PLN 3 billion (in 2018 it was exactly PLN 3.7 billion).

The number of tourist arrivals in tourist accommodation facilities in the period from January to September, when comparing 2019 and 2020, have decreased by 44%. The biggest decrease was recorded in Mazovieckie voivodship (−57%) and Łodzkie (−52%). The smallest decrease in this

Table 8. The Structure of Average Expenses on Domestic Travel Per Day (in PLN)

Description	2017	2018	2019	First half of 2018	First half of 2019	First half of 2020
Transport	137	148	151	16	17	23
Accommodation	306	353	381	35	37	35
Food and drinks in cafes and restaurants	292	330	341	33	35	36
Other expenses	132	137	139	14	15	19
Total	868	968	1,012	97	104	114

Source: Based on Central Statistical Office data—www.stat.gov.pl.

Table 9. The Share of the Tourism Economy in Generating GDP in 2014–2019

Description	2014	2015	2016	2017	2018	2019
Gross domestic product (PLN billion)	1,720.4	1,800.2	1,861.1	1,989.4	2,115.2	2,265.0
Revenues from the tourism economy (in PLN billion)	89.9	102.4	110.3	116.7	124.6	141.8
Domestic travel expenses of Polish residents (PLN billion)	16.4	18.5	21.8	24.2	27.7	30.8
Share of the tourism economy in GDP (%)	**5.2**	**5.7**	**5.9**	**5.9**	**5.9**	**6.3**

Source: Authors' study based on data from: Central Statistical Office—www.stat.gov.pl, GDP—Ministry of Sport and Tourism—www.msit.gov.pl, Ministry of Development—www.gov.pl/web/rozwoj-praca-technologia.

period was recorded in Zachodniomorskie (−29%) and Warminsko-mazurskie (−31%) (Figure 3).

Conclusions

On a global scale, tourism is treated as a priority sector due to its benefits for the economy (Różycki, 2006). Tourism generates about 10% of global GDP (*UNWTO Tourism Highlights*, 2018). The year 2020 will be a great exception. This data places tourism in third place among the largest sectors of the economy. In the economy, it performs primarily macroeconomic functions and can stimulate the socioeconomic development of tourist destination areas, and consequently the country's economy, through:

- creating added value, thus contributing to the growth of gross domestic product,
- increasing foreign exchange revenues obtained from servicing tourist movement,
- stimulating the development of entrepreneurship and infrastructure,

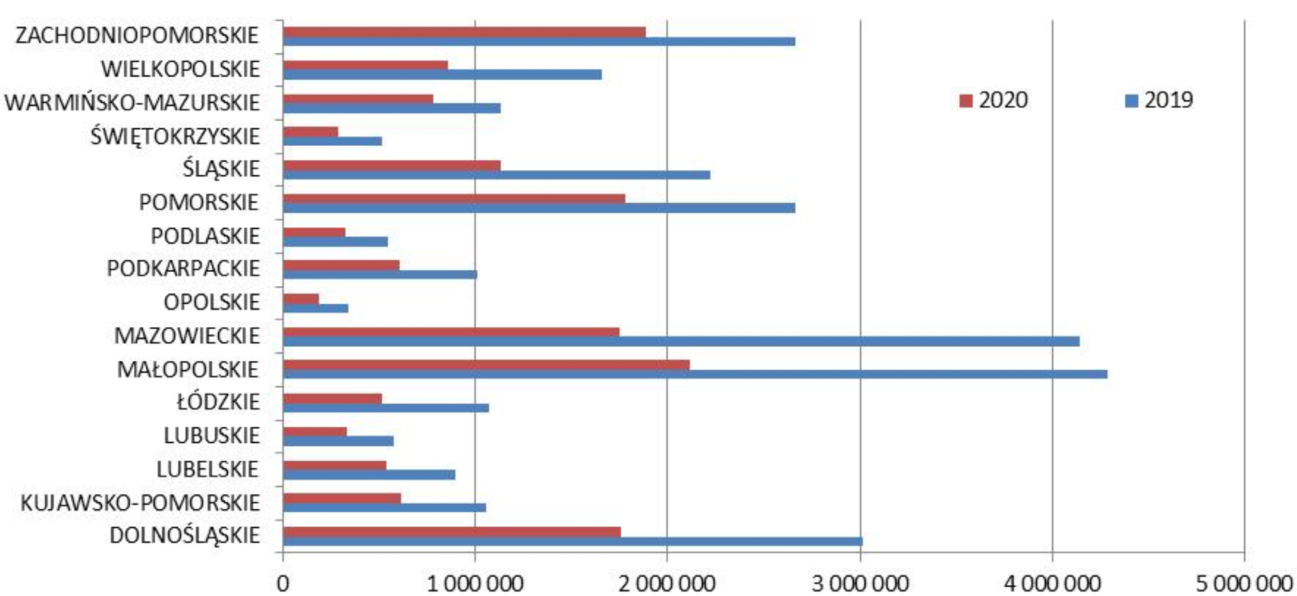

Figure 3. The number of tourist arrivals in tourist accommodation facilities in period from January to September in 2019 and 2020.
Source: Authors' elaboration based on Central Statistical Office data—www.bdl.stat.gov.pl.

Table 10. The Intensity of Domestic Tourist Movement by Voivodeships and the Number of Long-term and Short-term Trips (in million)

Description	2017		2018		2019		First half of 2018		First half of 2019		First half of 2020	
	Long-term	Short-term	Long-term	Short-term	Long-term	Short-term	Long-term	Short-term	Long-term	Short-term	Long-term	Short-term
Dolnośląskie	1.3	2.1	1.4	2.1	1.5	2.2	0.5	1.1	0.5	1.2	0.3	0.8
Kujawsko-pomorskie	0.7	1.3	0.7	1.3	0.8	1.3	0.2	0.6	0.2	0.6	0.1	0.4
Lubelskie	0.6	1.7	0.6	1.7	0.6	1.8	0.2	0.8	0.2	0.9	0.1	0.6
Lubuskie	0.4	0.6	0.4	0.6	0.4	0.6	0.1	0.4	0.1	0.4	0.06	0.2
Łódzkie	0.5	1.2	0.5	1.2	0.5	1.2	0.2	0.5	0.2	0.5	0.1	0.3
Małopolskie	2.5	3.7	2.6	3.8	2.8	4.0	1	1.9	1.1	2.0	0.7	1.4
Mazowieckie	1.4	4	1.4	4.2	1.5	4.4	0.5	2.1	0.6	2.2	0.3	1.4
Opolskie	0.1	0.5	0.1	0.5	0.2	0.4	0	0.2	0.0	0.2	0.02	0.1
Podkarpackie	1.1	1.6	1.1	1.7	1.2	1.7	0.4	0.8	0.4	0.8	0.3	0.5
Podlaskie	0.4	0.9	0.4	0.9	0.4	1.0	0.1	0.5	0.1	0.5	0.06	0.3
Pomorskie	3.6	2.5	3.8	2.8	4.1	2.8	0.8	1.2	0.9	1.2	0.5	0.8
Śląskie	1	1.7	1	1.7	1	1.8	0.4	0.8	0.4	0.9	0.3	0.5
Świętokrzyskie	0.5	0.8	0.5	0.8	0.4	0.7	0.2	0.4	0.1	0.4	0.1	0.2
Warmińsko-mazurskie	1.2	1.4	1.2	1.5	1.2	1.5	0.3	0.6	0.3	0.7	0.2	0.4
Wielkopolskie	0.5	1.8	0.6	1.8	0.6	1.8	0.2	0.9	0.2	0.9	0.1	0.6
Zachodniopomorskie	2.8	2.5	2.9	2.5	3.1	2.6	0.7	1.0	0.8	1.1	0.5	0.7
Total number of visits	18.4	28.2	19.3	29.1	20.2	30.1	5.8	13.9	6.2	14.4	3.9	9.6
Total number of travels	17.9	28.0	18.8	28.9	20.0	30.0	5.8	13.9	6.2	14.4	3.9	9.6

Note: The total number of visits to individual voivodeships is greater than the number of trips, as some people visited more than one voivodeship during one trip.
Source: Based on Central Statistical Office data – www.stat.gov.pl.

- creating new jobs and increasing the income of the population of tourist regions,
- increasing the revenues of companies serving tourists and fostering entrepreneurship and innovation,
- shaping the budget revenues of local governments (Semmerling, 2017).

The size of the country's GDP depends to a large extent on the amount of income obtained from the sale of tourist services. This is due to the fact that economic entities participating in the handling of tourist movement form a chain of services, which consists of the following links: hotels, restaurants, travel agencies, transport companies.

Hotel and transport companies tend to make the largest contribution to the proportion of GDP derived from tourism. Additionally, the volume of tourist movement depends on the political and economic situation, both in a given country and around the world. International tourism is a source of foreign exchange income and is an important element of the balance of payments of individual countries. Tourism, including foreign tourism, influences economic development mainly due to the fact that it causes the so-called multiplier effect.

An underestimated feature of the tourism industry is the transfer of funds from tourists' permanent residence to their final destination. Upon arriving at tourist destinations, tourists put into circulation certain funds, which can then be accumulated or further spent. Money from tourists is converted into goods and services, and then redistributed, circulated in the economy, creating a financial effect in all phases of economic turnover (Wodejko, 1997).

The multiplier effect is greater if more funds from tourism expenses are staying in tourism destinations. This results in a greater production of goods and services in a given country. The initial spending of tourists triggers an additional flow of money that flows through the various sectors of the economy. The size of the multiplier depends on three basic factors: the number of tourists coming to a given country, the length of stay and the amount of funds spent on the purchase of tourist and para-tourist services.

The development of tourism in a given country contributes significantly to the development of entrepreneurship and infrastructure (Winiarski & Zdebski, 2008). Due to the growing demand for tourist services, the development of this industry has a global impact on the level of entrepreneurship,

investment, and innovation. The development of entrepreneurship through the amount of taxes paid stimulates the development of individual regions and the entire country. Tax revenues allow for the implementation of necessary tourist investments. This, in turn, increases the attractiveness of a given country, which can then mean becoming a well-known tourist destination.

At the same time, the development of entrepreneurship based on the development of tourism may have a stimulating effect on the labor market. By dynamizing the development of the economy, it creates opportunities for employment and increasing income for local communities living in areas attractive to tourists.

On the other hand, with regard to infrastructure, tourism is one of the most important sectors influencing the shaping and transformation of places with special tourist attractions into tourist reception regions. This is due to the fact that the needs and motives for travel by tourists are always on the basis of shaping the tourism space. Tourist infrastructure located in a given country is always secondary and complementary to the primary goods, which are tourist attractions (natural and sociocultural) of a given place. Apart from tourist values, the tourist infrastructure is the core of the tourist product. Its condition and quality may affect the perception of attractiveness for tourists and the size of tourist movement in a given area.

At this point, the feedback effect is visible, in which the basic attractions are natural and sociocultural values of the country: they attract tourists, which causes an increase in tourism demand, expansion of tourism infrastructure, and development of entrepreneurship. This, in turn, influences economic and social development, and thus increases its attractiveness. However, from the perspective of foreign tourists, factors such as the political system, policy toward visitors and the level of security and stability of the country cannot be overlooked.

The analysis of the results of the research conducted in 2018 allows one to highlight several important phenomena. The data for the full 12 months of 2018 confirms the tendency of a further increase in the number of arrivals of foreigners (by 2.6%) and foreign tourists (by 7.5%)—the rate of growth has not changed much. Parallel to this positive trend with regard to the number of trips, there is a decreasing trend in the level of average expenses of tourists and one-day visitors, calculated in PLN, by 2.4% and 3.7%, respectively. The total revenues from incoming foreign tourism (calculated in PLN) increased by 2.9% compared to their level from the previous year. The COVID-19 pandemic has completely shaken the domestic travel market of Poles and inbound tourism to Poland. The first wave of COVID-19 reached Poland after the winter season and many restrictions were taken away just before the summer tourist season. The second wave of COVID-19 was just before the winter season of 2020/2021, which meant that hotels in Poland were completely closed to tourists from December 28, 2020. This situation was devastating for the tourism economy in Poland. However, the government help for hotel owners and the European Recovery Funds have brought relief the tourism development of infrastructure in Poland. The funds can help to regain the tourism flows to the levels of 2019 during the next several years. During the first wave of the COVID-19 pandemic in Poland, tourists were avoiding "mass tourism" and changed their options toward sustainable tourism. Domestic short-term tourism was preferred, close to the place of residence as an alternative to uncertain travel abroad in the time of the COVID-19 pandemic. Many tourists prefer recreation in the open air, whereby traveling with the family and relatives. In Poland it was observed that there was an increase in the development of agritourism, ecotourism, camping and caravanning offers, as well as tourism travel in natural rural areas. In the first half of 2020, trends were observed in different tourist demands. For example, the need for security with a simultaneous need for isolation and the desire to experience nature, the need to avoid large groups of people, looking for places to rest closer to home, and the growing importance of a car as a means of transport. And after all this was the tendency to book the travel in the last possible moment to avoid losing funds. According to Zhang et al. (2021) and Zenker and Kock (2020), the rebranding of destinations is a very important factor in the domestic market recovery after COVID-19. Moreover, according to Elnasr et al. (2021), governments are interested in the contribution of tourism industry in the national economy

more than the sustainability of businesses, especially during crisis events such as COVID-19.

The Implications of the Findings for Tourism Experts and Developers

The implications of the findings shown in the article for tourism experts are twofold. Firstly, the article shows how to develop tourism in a pandemic and post-pandemic period and in what way the tourism sector should diversify its activities to be more resistant to similar future health threats. Of great importance is the need to develop facilities near nature, away from crowded cities. Secondly, the types of tourism that are particularly popular during the COVID-19 times are agritourism, nature tourism, and active tourism, so enterprises should invest in those type of products.

The Limitations of the Study and Suggestions for Future Research

It needs to be mentioned that there are limitations of the study, and some of these are as follows: The first wave of COVID-19 was different than the second or third. During the first stage of COVID-19, people were more afraid of COVID-19. The restrictions in Poland were bigger than in second or third waves. Considerations for future research: Each wave of COVID-19 is a little bit different due to different behavior and due to different law solutions and restrictions, and of course different in countries with high levels of vaccination.

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