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## INTRODUCTION

An increase in the number of tourists and tourist travels, now ongoing for decades, has produced multiple and far-reaching results. They are direct or indirect, of diverse intensity and concern the socio-economic system and the natural environment in their entirety. An effect the easiest to indentify is the economic benefits achieved not only by enterprises involved in the processes of tourist service, but also (or even mainly) by tourism regions. The obviousness of positive effects of tourist arrivals contributes to treating tourism as an area development standard, one which mobilizes this area's competitive position (or allows for maintaining a high one) among other areas. Nowadays, the majority of areas (both urban and rural), regardless of its nature or dominant function, uses tourism as an element of their development strategy recognizing that it is simply a developmental opportunity, and regardless of objective local determinants. The wide range of relations between tourism and human/society, economy, spatial systems, and the natural environment spurs the development of research areas in many fields of science, at the same time creating favourable conditions for interdisciplinary research.

The "Tourism Economic Problems" series published within the *Zeszyty Naukowe Uniwersytetu Szczecińskiego* (The Scientific Journal of Szczecin University) presents the research findings and achievements of scientists from the Polish and foreign scholarly centres. The layout of the journal enables the presentation of studies on a diversity of problems related both to the theoretical issues of tourism as examined from the point of view of various fields of science and to the determinants and effects of tourism development on the economic plane, the latter including the tourism service market, functioning of tourism enterprises, tourism development over the world and regional problems of tourism development. The current issue of the journal presents the "tripartite" image of tourism, i.e. its theoretical aspects, its service market, and the regional problems of tourism development.

*Beata Meyer*



**THEORETICAL PROBLEMS  
OF TOURISM DEVELOPMENT**



**Marlena Bednarska\***

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**MODERATORS OF JOB CHARACTERISTICS –  
JOB SATISFACTION RELATIONSHIP  
IN THE TOURISM INDUSTRY**

**Abstract**

Human capital is generally recognised as the foundation of competitive advantage in the modern economy. Hence methods of work environment development have attracted more attention to recruit and retain high-quality job candidates. The purpose of the paper is to identify factors that moderate the relationship between job characteristics and job satisfaction in the tourism industry. Individual, organizational, and national components have been put under investigation. The paper analyses results of the 5th European Working Condition Survey run by Eurofound. The investigation reveals that the overall satisfaction with work in tourism is associated primarily with social value, followed by economic value, job content, and development value. Job characteristics – job satisfaction relationship is moderated by employment status of respondents, company size, type of activity, and T&T contribution to employment.

**Keywords:** job satisfaction, job characteristics, tourism industry, European Union

**Introduction**

It is generally recognised that human capital is the foundation of competitive advantage in the modern economy. The ultimate source of value creation are operant resources – the employees' knowledge, skills, and abilities uti-

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lised to create a differentiated and valued offering in the marketplace.<sup>1</sup> With the growing recognition of the critical role of the customer-employee interaction in the service delivery both practitioners and researchers have paid close attention to the methods of attracting and retaining employees who are committed to the set of values and organisational goals of the company.<sup>2</sup> Developing strategies to foster job satisfaction helps recruit workers who will maintain a positive, long-term employer-employee relationship and who will contribute to the efficient and effective delivery of services, thus to the market success of the service organisation.

Due to the engagement in transmitting the brand's values and creating an emotional bond with customers, the role of the service provider in the consumer's perception of the service organisation is fundamental. This is particularly so in tourism companies where the visitor experience is based, to an enormous extent, on the interaction with employees. By adapting to the individual customer requirements and enabling the co-creation of a personalised service experience, staff has the potential to influence the perceived value<sup>3</sup> and, subsequently, visitor satisfaction. This is why tourism companies must take measures to effectively manage their service providers to ensure that their attitudes and behaviours are commensurate with customer relationship objectives.<sup>4</sup>

The purpose of the paper is to identify factors that moderate the relationship between job characteristics and job satisfaction in the tourism industry. Individual, organisational, and national components were put under investigation. In the paper, the results of the 5th European Working Condition Survey run by European Foundation for the Improvement of Living and Working Conditions in 2010 is analysed. Special attention is paid to the self-reported satisfaction with work, intrinsic and extrinsic job characteristics, and the links between them. The paper opens by

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<sup>1</sup> T.W. Andreassen, E.J. Lanseng, *Service Differentiation: A Self-Image Congruency Perspective on Brand Building in the Labor Market*, "Journal of Service Management" 2010, Vol. 21, No. 2, p. 213.

<sup>2</sup> C. King, *'One Size Doesn't Fit All': Tourism and Hospitality Employees' Response to Internal Brand Management*, "International Journal of Contemporary Hospitality Management" 2010, Vol. 22, No. 4, p. 517.

<sup>3</sup> R.F. Lusch, S.L. Vargo, M. O'Brien, *Competing Through Service: Insights from Service – Dominant Logic*, "Journal of Retailing" 2007, Vol. 83, No. 1, p. 11.

<sup>4</sup> S.P. Brown, S.K. Lam, *A Meta-Analysis of Relationships Linking Employee Satisfaction to Customer Responses*, "Journal of Retailing" 2008, Vol. 84, No. 3, p. 244.

reviewing the literature on job satisfaction in tourism. Then the findings of the study on the differences in the nature and the strength of the relationship between tourism employee satisfaction and its drivers are presented. Finally, implications and recommendations for future research are proposed and the main conclusions summarised.

## 1. Job satisfaction in the tourism industry – literature review

Job satisfaction is commonly interpreted as an emotional response to a value judgement by an individual worker and it results from the perceived fulfilment of one's important job values. If job values are fulfilled, the pleasurable emotion of satisfaction is experienced; if they are neglected – the unpleasurable emotion of dissatisfaction is experienced. Thus the level of dis/satisfaction with work life is a function of the importance of the value and the degree of fulfilment of the value.<sup>5</sup>

The considerations on the employee satisfaction in service environment and its work-related consequences are conceptually supported by two models – service-profit chain and service climate.<sup>6</sup> The service-profit chain framework proposes that employees' satisfaction positively influence their loyalty and productivity. Workforce productivity raises value delivered which in turn enhances customer perceived service quality and customer satisfaction. Satisfaction is a prerequisite for customer loyalty, while an increase in loyalty leads to sales growth and profitability.<sup>7</sup> The service climate framework postulates that organisation can promote attitudes and behaviours which give rise to desirable customer reactions by facilitating service delivery and by rewarding service excellence. To reach this goal companies should provide their employees with sufficient resources and establish practices and procedures that enhance the quality of the service received internally.<sup>8</sup>

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<sup>5</sup> E.A. Locke, G.P. Latham, *Work Motivation and Satisfaction: Light at the End of the Tunnel*, "Psychological Science" 1990, Vol. 1, No. 4, p. 243.

<sup>6</sup> S.P. Brown, S.K. Lam, *A Meta...*, p. 245.

<sup>7</sup> J.L. Heskett, T.O. Jones, G.W. Loveman, W.E. Sasser, L.A. Schlesinger, *Putting the Service-Profit Chain to Work*, "Harvard Business Review" July–August 1999, pp. 167–169.

<sup>8</sup> B. Schneider, S.S. White, M.C. Paul, *Linking Service Climate and Customer Perceptions of Service Quality: Test of a Causal Model*, "Journal of Applied Psychology" 1998, Vol. 83, No. 2, p. 151.

Empirical studies carried out in the tourism industry suggest that employee satisfaction leads directly or indirectly to desirable workplace attitudes, intentions, behaviours, and performance outcomes both at the individual and the unit levels. Investigations among employees in casinos revealed that well-being at work is a strong determinant of organisational commitment.<sup>9</sup> Job satisfaction is evidenced to predict withdrawal behaviours. Zopiatis, Constanti and Theocharous have found it to display negative relationship with intention to quit of personnel in hotels.<sup>10</sup> Mount, Ilies and Johnson have diagnosed linkages between job satisfaction and interpersonal and organisational counterproductive work behaviours in fast food stores.<sup>11</sup> Yoon and Suh, in their research in travel agencies, have confirmed hypothesis that the more employees derive satisfaction from their job, the more actively they engage in organisational citizenship behaviours.<sup>12</sup> Positive attitudes lead to augmented job performance<sup>13</sup> and contribute to customer satisfaction<sup>14</sup>, as satisfied staff tend to provide tourism services that exceeds visitors' expectations. Finally, empirical studies provide evidence that satisfaction in the workplace positively influences profitability of tourism enterprises.<sup>15</sup>

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<sup>9</sup> K.-J. Back, C.-K. Lee, J. Abbott, *Internal Relationship Marketing: Korean Casino Employees' Job Satisfaction and Organizational Commitment*, "Cornell Hospitality Quarterly" 2011, Vol. 52, No. 2, p. 120.

<sup>10</sup> A. Zopiatis, P. Constanti, A.L. Theocharous, *Job Involvement, Commitment, Satisfaction and Turnover: Evidence from Hotel Employees in Cyprus*, "Tourism Management" 2014, Vol. 41, pp. 135–136.

<sup>11</sup> M. Mount, R. Ilies, E. Johnson, *Relationship of Personality Traits and Counterproductive Work Behaviors: The Mediating Effects of Job Satisfaction*, "Personnel Psychology" 2006, Vol. 59, No. 3, p. 608.

<sup>12</sup> M.H. Yoon, J. Suh, *Organizational Citizenship Behaviors and Service Quality as External Effectiveness of Contact Employees*, "Journal of Business Research" 2003, Vol. 56, No. 8, pp. 604–605.

<sup>13</sup> S.I. Ng, M. Sambasivan, S. Zubaidah, *Antecedents and Outcomes of Flight Attendants' Job Satisfaction*, "Journal of Air Transport Management" 2011, Vol. 17, No. 5, p. 312.

<sup>14</sup> O.M. Karatepe, T. Avci, H. Arasli, *Effects of Job Standardization and Job Satisfaction on Service Quality: A Study of Frontline Employees in Northern Cyprus*, "Services Marketing Quarterly" 2004, Vol. 25, No. 3, pp. 11–12.

<sup>15</sup> R.W.Y. Yee, A.C.L. Yeung, T.C.E. Cheng, *The Service-Profit Chain: An Empirical Analysis in High-Contact Service Industries*, "International Journal of Production Economics" 2011, Vol. 130, No. 2, p. 242.

Researchers have attempted not only to explore the outcomes of job satisfaction, but also to examine the diverse job-specific and organisation-specific components that are likely to influence employees' well-being at work. Factors contributing to workers' satisfaction have been often identified as intrinsic or extrinsic. Intrinsic job characteristics refer to the job content, i.e. tasks that are done, while extrinsic job characteristics refer to the job context, i.e. the environment in which tasks are done. The strength of the relationship between the intrinsic and extrinsic job characteristics and job satisfaction depends on the value employees attach to those rewards in the workplace.<sup>16</sup>

A considerable stream of research on job satisfaction drivers in the tourism industry indicated the key role of extrinsic facets in shaping well-being at work. In the investigation of restaurant managers run by Lam, Baum and Pine "rewards" (salary, fringe benefits, job security, and status) emerge as the focal factor contributing to the overall satisfaction with work.<sup>17</sup> Similar conclusions have been reached by Gu and Siu who surveyed casino employees and reported that salaries and benefits were ranked as the most important drivers of satisfaction with work life.<sup>18</sup> Yang's investigation conducted at lodging properties identified leading position of relationships with co-workers in determining employee satisfaction.<sup>19</sup> McPhail and Fisher in their study of employees of a multinational hotel chain found that training and promotion opportunities were the strongest predictors of job satisfaction.<sup>20</sup>

Despite the strategic importance of work quality in sustaining competitive advantage of service organisations, the issue of moderators of job characteristics

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<sup>16</sup> X. Huang, E. van de Vliert, *Where Intrinsic Job Satisfaction Fails to Work: National Moderators of Intrinsic Motivation*, "Journal of Organizational Behavior" 2003, Vol. 24, No. 2, p. 160.

<sup>17</sup> T. Lam, T. Baum, R. Pine, *Study of Managerial Job Satisfaction in Hong Kong's Chinese Restaurants*, "International Journal of Contemporary Hospitality Management" 2001, Vol. 13, No. 1, pp. 39–40.

<sup>18</sup> Z. Gu, R.C.S. Siu, *Drivers of Job Satisfaction as Related to Work Performance in Macao Casino Hotels: An Investigation Based on Employee Survey*, "International Journal of Contemporary Hospitality Management" 2009, Vol. 21, No. 5, p. 572.

<sup>19</sup> J.-T. Yang, *Antecedents and Consequences of Job Satisfaction in the Hotel Industry*, "International Journal of Hospitality Management" 2010, Vol. 29, No. 4, pp. 615–616.

<sup>20</sup> R. McPhail, R. Fisher, *It's More Than Wages: Analysis of the Impact of Internal Labour Markets on the Quality of Jobs*, "International Journal of Human Resource Management" 2008, Vol. 19, No. 3, pp. 467–469.

– job satisfaction relationship in the tourism industry has received relatively little attention from researchers. Several studies have aimed to test differences in reported job satisfaction level.<sup>21</sup> However, questions about variation in the relationships between job characteristics and job satisfaction have remained unaddressed. The value of such exploration is substantial given the critical role that tourism employees provide to visitors’ overall experience and subsequent evaluation of the market offerings’ quality. It is argued in the paper that three levels of moderators should be taken into consideration when exploring factors which influence job characteristics – job satisfaction linkages: individual, organisational, and national (Fig. 1).

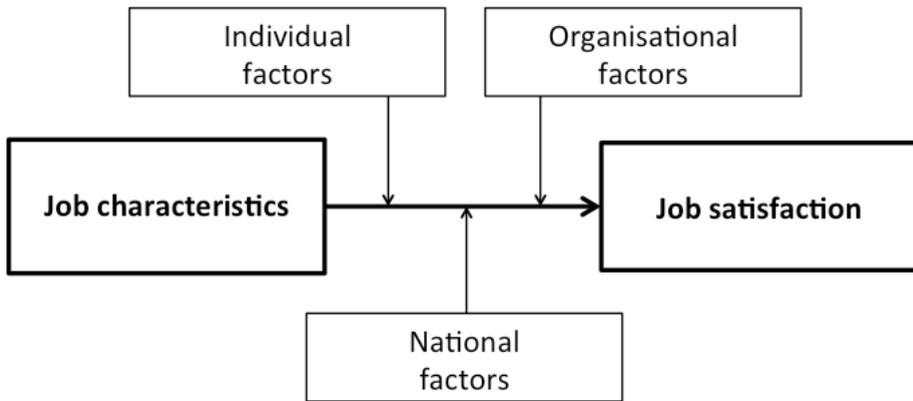


Fig. 1. Conceptual model

Source: own elaboration.

## 2. Data and method

To complete the objective of the study desk, research has been conducted and the secondary data have been were utilised. The analysis is based largely on the fifth edition of the European Working Condition Survey (EWCS) run

<sup>21</sup> M.A. Bednarska, *Tourism Jobs and Subjective Well-Being at Work: A Cross-National Analysis*, “European Journal of Tourism, Hospitality and Recreation” 2014, Vol. 5, No. 2, pp. 16–18.

in 2010 by European Foundation for the Improvement of Living and Working Conditions. The EWCS is a comparative multi-national survey, which provides information on various aspects of the quality of work life. The main topics covered in the questionnaire are: satisfaction with working conditions, job content, working time, work organisation, physical and psychosocial factors, economic benefits, career prospects, health and well-being, and work-life balance. Nearly 44000 respondents from 34 countries have participated in the research.<sup>22</sup> For the purpose of this study, the analysis has been limited to residents of EU-28 Member States.

Additional secondary data sources have been the Eurostat statistics and World Travel & Tourism Council (WTTC) reports on the economic impact of travel and tourism. The major focus has been on macroeconomic indicators, especially those characterising relations on the labour market and showing the direct contribution of travel and tourism (T&T) to the employment in European Union countries.<sup>23</sup>

Based on the internationally recommended methodology for tourism statistics provided by World Tourism Organization<sup>24</sup> and the level of available data aggregation (the EWCS applies the NACE Rev. 2 classification to carry out its sectoral analysis), the subsequent analysis relates to selected tourism characteristic activities, specifically accommodation, food and beverage serving activities, travel agencies and other reservation service activities, cultural activities, and sports and recreational activities. Persons employed (and self-employed) in the divisions under investigation account for 5,8% of the total sample – 2554 respondents. Females represent nearly 60% of the subsample and participants range in age from 15 to 89 years old, with the mean age of 39 years. The majority of them work in accommodation and food service activities, in micro entities. Respondents are mainly service and sales workers in paid employment; their work arrangements are primarily indefinite. Table 1 shows selected statistics for the interviewed workers.

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<sup>22</sup> Eurofound, *Fifth European Working Conditions Survey*, Publications Office of the European Union, Luxembourg 2012, <http://www.eurofound.europa.eu/surveys/ewcs/2010>.

<sup>23</sup> Eurostat, *Employment and unemployment (Labour Force Survey) 2010*, <http://ec.europa.eu/eurostat/data/database>; World Travel & Tourism Council, *Economic Data Search Tool 2010*, <http://www.wttc.org/research/economic-impact-research>.

<sup>24</sup> World Tourism Organization, *International Recommendations for Tourism Statistics 2008*, “Studies in Methods”, Series M, No. 83/ Rev. 1, United Nations, New York 2010, pp. 111–112.

Table 1

## Profile of research sample

Variable	Category	Value
Gender [%]	Female	57.0
	Male	43.0
Age [years]	Mean	38.6
	Median	38.0
Level of education [%]	Primary	5.9
	Secondary	71.1
	Tertiary	23.0
Tenure [years]	Mean	7.2
	Median	4.0
Employment status [%]	Self-employment	17.0
	Paid employment	79.5
	Other	3.5
Employment contract [%]	Indefinite contract	69.2
	Temporary contract	18.1
	No contract	11.5
	Other	1.1
Occupation [%]	Managers and professionals	30.7
	Clerical support workers	10.2
	Service and sales workers	42.8
	Machine operators and elementary occupations	13.9
	Other	2.5
Company size [%]	Micro	56.2
	Small	29.8
	Medium	10.8
	Large	3.2
Type of economic activity [%]	Accommodation and food service activities (I)	68.0
	Administrative and support service activities (N)	5.4
	Arts, entertainment and recreation (R)	26.6

Source: based on Eurofound, *European Working Conditions Survey 2010*, UK Data Archive, Colchester, <http://www.esds.ac.uk/findingData> (19.06.2012).

Based on the review of literature relating to antecedents of employee well-being as well as data availability, four dimensions are chosen to picture intrinsic and extrinsic job characteristics; these include: job content (work itself), economic

value, development value, and social value.<sup>25</sup> Respondents used 5-point scales to measure their overall satisfaction with being employed by a given company and to assess job content and context (ranging from 1 – “very low” to 5 – “very high”).

In order to identify factors modifying the relationships between job characteristics and job satisfaction, the following qualitative and quantitative variables were tested:

- individual: gender, occupation, employment status, employment contract,
- organisational: company size, type of activity,
- national: unemployment rate, T&T contribution to employment.

The data analysis techniques included general descriptive statistics and correlation coefficients. In an attempt to identify the moderators of main effects of the relationships under study, moderated hierarchical multiple regression models were estimated. The statistical processing of the survey data was conducted using the SPSS software package.

### **3. Results and discussion**

The basic statistics for the study variables are reported in Table 2 presenting the descriptive statistics and the correlations between all the indicators used. Most tourism employees report themselves as satisfied or very satisfied with their jobs, with a minority deriving dissatisfaction from working for a particular company. The best perceived satisfaction driver is the job content, the worst – the development value. The computed correlation coefficients indicate that there has been a significant association between the overall job satisfaction and all of the dimensions under investigation.

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<sup>25</sup> M.A. Bednarska, *Tourism...*, p. 15.

Table 2

## Variable means, standard deviations, and correlations

Variable	Mean	Standard deviation	Correlations			
			1.	2.	3.	4.
1. Job satisfaction	3.86	1.038				
2. Job content	4.00	.928	.359*			
3. Economic value	2.99	1.110	.420*	.221*		
4. Development value	2.63	1.201	.332*	.311*	.340*	
5. Social value	3.79	.745	.490*	.410*	.381*	.301*

\* Significant at  $p < 0.01$  (2-tailed)

Source: based on Eurofound, *European Working Conditions Survey 2010*, UK Data Archive, Colchester, <http://www.esds.ac.uk/findingData> (19.06.2012).

To examine the nature of relationships between the satisfaction with work and its potential drivers, multiple regression analysis has been employed. Overall job satisfaction has been regressed against the job content, economic value, development value, and social value to determine the predictive power of each (Tab. 3). The model was statistically significant ( $F_{4,2365} = 314.82$ ,  $p < .001$ ) and it accounted for 35% of the variance in the job satisfaction ( $R^2_{adj} = .346$ ). Positive and significant beta coefficients were found for all independent variables, with social value yielding the most predictive power, followed by economic value, job content, and development value.

Table 3

## Summary of multiple regression model of predictors of job satisfaction

Independent variable	B	SE-B	$\beta$	t
Job content	.150	.021	.133	7.11*
Economic value	.215	.018	.227	12.18*
Development value	.101	.016	.116	6.32*
Social value	.464	.028	.326	16.69*

\* Significant at  $p < 0.001$

Source: based on Eurofound, *European Working Conditions Survey 2010*, UK Data Archive, Colchester, <http://www.esds.ac.uk/findingData> (19.06.2012).

Next, eight moderated hierarchical multiple regression models have been estimated to test for hypothesised individual, organisational, and national

moderators of main effects. Four of them turned out to be significant, i.e. they explained significantly higher proportion of the variance in job satisfaction than models without interactive effects and they included at least one interaction term that reached significance. As models 1–4 confirm (Tab. 4), the moderating effects of employment status, company size, type of activity, and T & T contribution to employment were found. The expectation of the moderating effects of gender, occupation, employment contract, and unemployment rate did not find support in the data.

Table 4

Summary of moderated multiple regression models of predictors of job satisfaction

Independent variable	Model 1	Model 2	Model 3	Model 4
1	2	3	4	5
Step 1 – main effects				
Job content	.193***	.142***	.168**	.140***
Economic value	.252***	.227***	.136**	.227***
Development value	.116***	.114***	.111**	.114***
Social value	.286***	.327***	.345***	.326***
Employment status	-.032			
Company size		.016		
Type of activity (N)			-.012	
Type of activity (R)			.066*	
T&T contribution to employment				-.086***
Step 2 – interactive effects				
Job content x status	.069 <sup>#</sup>			
Economic value x status	.042 <sup>#</sup>			
Development value x status	.001			
Social value x status	-.064*			
Job content x size		.012		
Economic value x size		.036 <sup>#</sup>		
Development value x size		-.045*		
Social value x size		-.012		
Job content x type (N)			.026	
Economic value x type (N)			-.089*	
Development value x type (N)			.020	
Social value x type (N)			.048	
Job content x type (R)			.029	

	1	2	3	4	5
Economic value x type (R)				-.024	
Development value x type (R)				-.040 <sup>#</sup>	
Social value x type (R)				-.039 <sup>#</sup>	
Job content x T&T employment					.039 <sup>*</sup>
Economic value x T&T employment					.035 <sup>#</sup>
Development value x T&T employment					-.001
Social value x T&T employment					.005
R <sup>2</sup> <sub>adj</sub>		.347 <sup>***</sup>	.350 <sup>***</sup>	.352 <sup>***</sup>	.355 <sup>***</sup>
Δ R <sup>2</sup>		.003 <sup>#</sup>	.002 <sup>#</sup>	.005 <sup>*</sup>	.004 <sup>*</sup>

Significant at <sup>#</sup> p < 0,1; \* p < 0.05; \*\* p < 0.01; \*\*\* p < 0.001

Note: standardized coefficients are reported.

Source: based on Eurofound, *European Working Conditions Survey 2010*, UK Data Archive, Colchester, <http://www.esds.ac.uk/findingData> (19.06.2012).

The interactions between employment status and job content, economic value and social value (Model 1) imply that work itself and financial rewards are more significant predictors of satisfaction with work for self-employed while social relations are more meaningful for salaried employees. As suggested by size-by-economic value and size-by-development value interaction terms (Model 2), those working in micro entities attach relatively high importance to remuneration and low importance to career advancement opportunities as overall job satisfaction drivers. The interactions between activity type and economic, development and social values (Model 3) denote that the link between job satisfaction and financial rewards is comparatively weak in the subsample of travel agencies employees, whereas the effect of development opportunities and interpersonal relations on job satisfaction is comparatively weak in the group of entertainment and recreation employees. As confirmed by Model 4, the higher direct contribution of travel and tourism to employment in the economy, the greater predictive power of job content and economic value is in explaining job satisfaction variance.

The present study addresses the call for empirical research on differential effects of diverse variables on the link between job satisfaction and its drivers

in the tourism industry.<sup>26</sup> The main objective of the investigation has been to identify individual, organisational, and national factors that moderate the relationship between job characteristics and satisfaction of tourism employees. The study findings provide empirical validation for the proposed conceptual model, in particular the results show that the predictive power of job content and context in explaining variation in subjective well-being at work in tourism vary by employment status (individual factor), company size and the type of activity (organisational factors), and T&T contribution to employment (national factor).

There are theoretical and practical contributions of this research study. From a theoretical standpoint, it may contribute to the existing knowledge of the subjective well-being at work in the tourism industry and reasons for differences in reported job satisfaction. From a practical view, it would add to the understanding of the influence of job and organisation attributes on the perception of well-being at work. If tourism companies understand factors having differential effects on satisfaction with work and its drivers, they can modify their recruitment strategy and tailor human resource practices to attract and retain highly performing employees who are ready to create and deliver value to customers and can become a source of sustained competitive advantage.

Several weaknesses of this study should be addressed. First of all, it draws upon the secondary source of information and has a major disadvantage inherent in its nature – the analysis is limited to available data, thus it is possible that other factors (not covered in the EWCS questionnaire) impact employee satisfaction as well as job characteristics – job satisfaction relationship in tourism. Furthermore, variables have been categorized in a way which constrained the exploration to five divisions of economic activities. Therefore, the findings may not be wholly transferable to the tourism industry in general. Finally, all variables in the Eurofound survey have been measured with self-reports and based on the single-source data. In consequence, the research findings might be influenced by common method bias, in particular social desirability and response consistency effects. An enhanced understanding of the nature of associations between job characteristics and job satisfaction in the tourism industry is certainly the key contribution of this paper. Still, much of the variance in these linkages remains to be explained. Thus,

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<sup>26</sup> M.A. Bednarska, *Quality of Work Life in Tourism – Implications for Competitive Advantage of the Tourism Industry*, “Journal of Travel and Tourism Research” Spring & Fall 2013, p. 14.

it would be worth to further identify and refine the antecedents of subjective well-being at work of tourism employees.

## **Conclusion**

Tourism firms in general and high-contact firms in particular would benefit from attaching greater importance to work environment development – high job satisfaction experienced by an employee is the prerequisite for high satisfaction experienced by a customer. It contributes to staff commitment, loyalty, willingness to invest in firm-specific human capital, service effort, and customer orientation, hence adds to the human assets quality. Therefore, effectively measuring and improving job satisfaction is a critical function of contemporary management. It is essential for tourism organisations to monitor satisfaction among their workforce constantly, to identify the drivers of well-being at work, and to take measures to enhance employee satisfaction. Responding to personnel's needs, while balancing these needs with the firm's objectives, helps augment productivity of the enterprise.

## **Acknowledgements**

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## MODERATORY ZALEŻNOŚCI POMIĘDZY CECHAMI PRACY A SATYSFAKCJĄ Z PRACY W GOSPODARCE TURYSTYCZNEJ

### Streszczenie

Postrzeganie kapitału ludzkiego jako podstawy tworzenia przewagi konkurencyjnej na współczesnym rynku skłania podmioty gospodarcze do kształtowania środowiska pracy sprzyjającego pozyskaniu i utrzymaniu pracowników o odpowiednich kompetencjach. Celem artykułu jest identyfikacja kryteriów różnicujących zależność pomiędzy cechami pracy a satysfakcją z pracy w turystyce. Analizie poddano czynniki indywidualne, organizacyjne i krajowe. W rozważaniach wykorzystano wyniki piątej edycji European Working Condition Survey przeprowadzonej przez Eurofound. Badania pokazują, że satysfakcja z pracy w turystyce zależy przede wszystkim od relacji społecznych, a w dalszej kolejności od korzyści ekonomicznych, treści pracy i możliwości rozwoju. Na siłę zależności pomiędzy tymi kategoriami wpływa status zatrudnienia, wielkość przedsiębiorstwa, rodzaj prowadzonej działalności oraz udział turystyki w tworzeniu miejsc pracy w gospodarce.

**Słowa kluczowe:** satysfakcja z pracy, cechy pracy, gospodarka turystyczna, Unia Europejska

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## **CUSTOMER RATINGS AS A TOOL FOR THE INFORMATION ASYMMETRY REDUCTION IN THE HOSPITALITY MARKET**

### **Abstract**

One of the important stages of the buying process is seeking the information which should be valid, reliable and consistent with the current demand. Nowadays, in the information society, the source of this information is no longer primarily a service provider (eg. the hotel), but other consumers who have benefited from these services. The aim of this study is to make a comparative analysis of the methods for generating customer ratings of the hotels in the available online resources (online travel agencies and hotel e-intermediaries, hotel search engines, providers of travel reviews and social media). As a research tool, a critical review of the literature is used and exploration of online resources has been made. The study clearly shows that the customer rating systems are highly heterogeneous. Both the number and type of evaluation criteria, rating scale and definitions of reviewers are the factors which have significantly differentiated the analyzed systems. However, this heterogeneity and many other disadvantages such as the subjectivism of advisers, significant discrepancies between reviews et al., do not undermine these systems' usefulness in reducing information asymmetry in the hospitality market and in the decision-making process by the client.

**Keywords:** online reviews, e-intermediaries, quality systems, categorization of hotels

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## **Introduction**

One of the important stages of the buying process is seeking the information which should be valid, reliable and consistent with the current demand. Nowadays, especially in the information society, the source of this information is no longer primarily a service provider (eg. the hotel) but other consumers who have benefited from these services. Recently, reviews and ratings of customers have become so popular that their number should be estimated in millions. Thus, they contribute, to a large extent, to the reduction of market imperfection, or else, the asymmetry of information. In the case of hotel services, this is manifesting itself via the considerable advantage of the service provider: because of the service intangibility the customer cannot touch services, explore and see them prior to the arrival to hotel. So the client has to rely on the information of the owner. However, the potential customer can offset the advantage of using the opinions of others whose advantage in relation to the information from the owner is of greater credibility for them.

However, a multiplicity of opinions available on the websites makes it necessary to systematize the methods of collecting these reviews so as to indicate who forms them and according to which criteria and scale.

The aim of this study is to make a comparative analysis of the methods for generating customer ratings of the hotels in the available online resources. As a research tool a critical review of the literature has been used and the exploration of online resources has been made.

### **1. Importance of customer ratings in the reduction of information asymmetry in the hospitality market**

The problem of information asymmetry in the hospitality market is associated largely with a significant gap between the possessed information about the hotel and its services and what the client actually buys and consumes.<sup>1</sup> The solution to this problem would seem to be existing in many countries' categorization

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<sup>1</sup> M. Januszewska, E. Nawrocka, *Funkcjonowanie przedsiębiorstw turystycznych w warunkach niepewności i ryzyka*, „Prace Naukowe Uniwersytetu Ekonomicznego we Wrocławiu” 2012, pp. 224–236.

systems of hotel facilities (both obligatory and voluntary). In practice, however, it appears that these solutions are far imperfect due to the following reasons:

- lack of categorization systems in many countries,
- heterogeneous criteria and requirements for hotels dependent on country,
- ability to bypass the categorization process outside the official list,
- imperfect system of monitoring the process of categorization,
- customers' limited knowledge on the existence and the principles of categorization systems,
- limited access to the client categorization requirements in different countries (usually in the local language),
- only the quantitative requirements of categorization, lack of quality criteria,
- verification of the fulfilment solely of minimum requirements, lack of the information about the criteria above-standard,
- one-time assessment made by officials entitled to use the granted category indefinitely (the controls are rare, and the penalties when the criteria are not met symbolic).

As a result, many objects with the same number of stars in fact significantly differ from each other, both in the quality and standard of services, equipment, food, service, and often in the quantitative criteria – room/bathroom/bed etc. size. Due to the imperfections of the existing administrative systems of categorization and their insufficient role in reducing information asymmetry<sup>2</sup> there have been introduced various systems of evaluation of hotels, which support consumer decisions.<sup>3</sup> They include other informal methods of assessment of hotel facilities and services<sup>4</sup>, among them the following:

- introduction of service standards (for chain hotels) to ensure a consistent level of service in the objects belonging to the group of hotels,

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<sup>2</sup> J.A. Núñez-Serrano, J. Turrión, F.J. Velázquez, *Are stars a good indicator of hotel quality? Assymmetric information and regulatory heterogeneity in Spain*, "Tourism Management" 2014, No. 42, pp. 77–87.

<sup>3</sup> J. Szumilak, *Racjonalność zachowań nabywców usług turystycznych w aspekcie gospodarowania informacją*, „Folia Turistica” 2007, p. 7.

<sup>4</sup> E.N. Torres, H. Adler, C. Behnke, *Stars, diamonds, and other shiny things: The use of expert and consumer feedback in the hotel industry*, "Journal of Hospitality and Tourism Management" 2014, No. 21, pp. 34–43.

- certification of the hotel services - quality certificates in a variety of categories (spa & wellness, business hotels, family-friendly etc.) guarantee the fulfilment of certain requirements necessary to obtain a certificate,
- conducting independent categorizations by e-intermediaries and online travel agencies,
- introduction of the customer ratings and reviews on the portals of e-intermediaries.

Nowadays, due to the growing importance of the Internet<sup>5</sup> the scale and role of customers' feedback such as reviews on the web increases.<sup>6</sup> The activity in this area is called eWOM (Electronic Word of Mouth).<sup>7</sup> These opinions appear in many places on the Internet. Customers looking for an object often compare opinions from different sources in order to minimize the risk of making the wrong decision about choosing a hotel.<sup>8</sup> The growing importance of the opinion on the Internet and their advantage over the official categorizations have been confirmed by studies of Ogut and Onur Tas.<sup>9</sup> They show that the increase in the value of customer ranking leads to the increase in the hotel's price, while the lack of similar relationship is observed with reference to the growth of official category. In addition, as confirmed by other researchers<sup>10</sup>, customer reviews have persuasive effects on customers' booking decisions.<sup>11</sup> On the one hand,

<sup>5</sup> K. Biełuszko, *Opiniotwórcza rola mediów społecznościowych w kształtowaniu zachowań nabywczych klientów hoteli*, in: *Dynamika Przemian Rynku Turystycznego*, ed. W. Banasik, Z. Kruczek, No. 1, WSTiJO, Warszawa 2014, pp. 213–229.

<sup>6</sup> Z. Liu, S. Park, *What makes a useful online review? Implication for travel product websites*, "Tourism Management" 2015, No. 47, pp. 140–151.

<sup>7</sup> A.S. Cantallops, F. Salvi, *New consumer behavior: A review of research on eWOM and hotels*, "International Journal of Hospitality Management" 2014, No. 36, pp. 41–51.

<sup>8</sup> K.L. Xie, Z. Zhang, Z. Zhang, *The business value of online consumer reviews and management response to hotel performance*, "International Journal of Hospitality Management" 2014, No. 43, pp. 1–12.

<sup>9</sup> H. Ögüt, B.K. Onur Taş, *The influence of internet customer reviews on the online sales and prices in hotel industry*, "The Service Industries Journal" 2012, No. 32 (2), pp. 197–214.

<sup>10</sup> Q. Ye, R. Law, B. Gu, *The Impact of Online User Reviews on Hotel Room Sales*, "International Journal of Hospitality Management" 2009, Vol. 28, No. 1, pp. 180–182; Q. Ye, R. Law, B. Gu, W. Chen, *The Influence of User-generated Content on Traveler Behavior: An Empirical Investigation on the Effects of E-word-of-mouth to Hotel Online Bookings*, "Computers in Human Behavior" 2011, Vol. 27, No. 2, pp. 634–639.

<sup>11</sup> Q. Lu, Q. Ye, R. Law, *Moderating Effects of Product Heterogeneity between Online Word-of-Mouth and Hotel Sales*, "Journal of Electronic Commerce Research" 2012, No. 15 (1), pp. 1–12.

the opinions and reviews help the client to perceive the quality and standard of the object, on the other hand, encourage the purchase. However, customer ratings conducted by e-intermediaries significantly differ from each other. This diversity of customer rating systems offered by different e-intermediaries is the cause for carrying out their detailed analysis.

## **2. Research methodology**

The aim of this study is to make a comparative analysis of customer ratings of hotels in the available online resources. As a research tool a critical review of the literature has been used and the exploration of online resources has been made. The literature review and exploratory study help identify a group of online resources, where the hotel reviews are available. These are:

- online travel agencies and hotel e-intermediaries – 16 systems,<sup>12</sup>
- hotel search engines (comparing prices) – 4 searches,<sup>13</sup>
- providers of travel reviews – 2 portals,<sup>14</sup>
- social media – facebook.<sup>15</sup>

The study was conducted on March 3, 2015. The analysis of the above websites has included aspects relevant in view of suitability for users when making a choice of a hotel. Therefore, the following issues have been researched:

1. Does the analyzed website operate its own rating system for hotels or borrows it from other sources?
2. Who can issue opinions in the system?
3. Is there a classification of advisers due to their type of journey, travel company etc.?

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<sup>12</sup> On the basis of the literature on the subject and explored online resources there were selected, for the purpose of studying, the most popular and best promoted online systems, namely: [hotele24.pl](#), [staypoland.pl](#), [hrs.com](#), [booking.com](#), [orbitz.com](#), [hotele.pl](#), [hotels.com](#), [Expedia.com](#), [lastminute.com](#), [esky.pl](#), [travelocity.com](#), [agoda.pl](#), [venere.com](#), [easytobook.com](#), [hotel.opia.pl](#), [hotel.info](#).

<sup>13</sup> According to the above criteria, there were selected: [trivago.pl](#), [rezerwuje.pl](#), [hotelcalculator.com](#), [hotelscombined.com](#).

<sup>14</sup> The most popular providers of travel reviews are: [tripadvisor.com](#) and [holidacheck.com](#).

<sup>15</sup> Among the social media, only Facebook has a separate tab for expressing an opinion on the fanpage.

4. Are the hotels evaluated according to the descriptive opinion (review), point scale or another means of assessment (eg. recommendation)?
5. What elements are evaluated – the evaluation criteria?

### 3. Systems of customer ratings of the hotel – results' analysis and discussion

The variety of internet hotel reviews make customers confused when they are trying to analyze them and to obtain a reliable opinion. Therefore, it is extremely important to understand the rules of making and presenting reviews. At the outset, it should be noted that not all of the analyzed websites have the evaluation system for hotels, and many of them do not collect opinions on their own, but borrow them from other external sources. The most used source of customer opinions is Tripadvisor.com., the most influential travel portal (Figure 1).

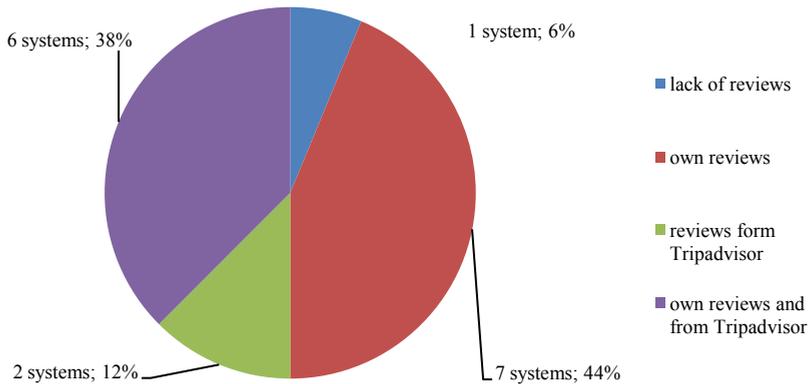


Fig. 1. Sources of hotel opinions in reservation systems

Source: own elaboration.

Of the 16 analysed reservation systems, seven run their own proprietary methodologies to assess hotels, one system does not offer customers' opinions about hotels, two systems collect their own opinions, but are relying also on Tripadvisor. The last two reservation systems show only opinions from Tripadvisor. In the case of hotel search engines, the situation is as follows: only one search engine gathers opinions from customers, and on this basis it makes hotel rating. The remaining three, due to the fact of presenting hotels available on different reservation

systems, they direct for opinions of these systems. One exception is Trivago.pl which, on the basis of external opinions, creates a self-rating of hotels tRI.<sup>16</sup> The third type of the website which offer hotel reviews are the opinion leaders portals (provider of travel reviews), i.e. Tripadvisor.com and holidaycheck.com. In both cases, the aim of these websites is presenting the opinions about hotels (and other companies in the industry, as well as tourist destinations). The last surveyed source of reviews for clients is the social networking site Facebook, where users can express their opinions of the hotel on its fanpage.

One of the factors that strongly determine the reliability of the reviews presented on the surveyed websites is information about the author. In this context two aspects – who can give opinions in systems and what was the purpose of stay in the hotel – have been examined. Almost all analyzed systems that collect reviews about hotels (except esky.pl) offer a possibility to issue an opinion only by those who actually made a reservation in the system and stayed in the hotel. Thus, this increases the reliability of presented reviews and opinions. Similarly, hotel search engines referring to the opinion in the reservation systems are based on the assessment of real-life experiences of hotel guests, as opposed to Tripadvisor, Holidaycheck.com and Facebook where anyone can place a review and rate a hotel regardless of whether s/he actually has been or not to this place.

The presented opinions are more or less useful for people who read them, depending on who issues them and for what purpose s/he visited the hotel because it allows the reader to assess to which extent their needs can be met. Therefore, it is important to classify reviewers into clearly defined categories. Among the 22 analyzed sources of reviews (hotele24.pl does not collect opinions, so was excluded from further study and analysis), only six do not classify reviewers: Facebook, two hotel search engines and three reservation systems. On the other websites, the person providing the opinion is asked to give the purpose or the nature of his/her stay. Both the way of defining the nature of stay and the number of categories of reviewers, remain for various e-intermediaries very heterogeneous, i.e. range from 3 to 9 categories. The most common types of stay of reviewers are: business purposes or family trip, travel with friends, alone or with a partner (Figure 2). Yet, there are also systems that apply the criterion of age (travellers and their children) or the specific purpose of travel, like shopping or spa.

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<sup>16</sup> tRI – trivago Rating Index – takes available rating sources from across the web and uses an algorithm to aggregate them, providing a dependable and impartial score ([www.trivago.com](http://www.trivago.com)).

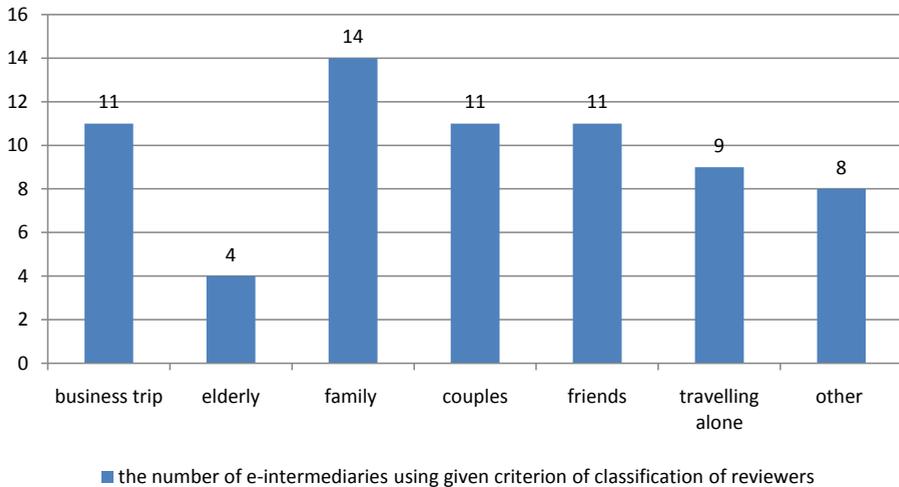


Fig. 2. Classification of reviewers on the analyzed websites

Source: own elaboration.

People who look for reviews of the hotel, usually, in the first place pay attention to the rating of the object, then also often change the order of display of objects according to this criterion, and only then they go to the reviews (both positive and negative). The analysed systems in the vast majority (18 of 22) show both a descriptive assessment (opinion) and point scale (in range 1–5, 1–6 or 1–10), and the three systems also present the percentage of customers who are satisfied with their stay and/or give a recommendation for object. Only in the case of hotel-sccombined.pl there appears point evaluation without description, and in the case of Trivago it is necessary to visit the reservation system to read the reviews.

The final issue analysed within the framework of the research is the criteria of ratings. The smallest number of criteria occurs on travelocity.com (only 3) and Expedia.com (only 4), and the three systems carry out the rating based on five criteria. As many as 8 systems calculate their ratings based on 6 components, two systems – based on 7 criteria, the most comprehensive ranking is provided by staypoland.pl (9 criteria) and hrs.com (14 criteria). *In toto*, all websites report 24 criteria among which the most frequently repeated are: staff/service (16 systems), cleanliness (14 times), localization (12 systems), breakfast/meal (11 times), value for money (9 times) and 6 times the comfort and silence. Other criteria appear occasionally in one, two or three systems (Figure 3).

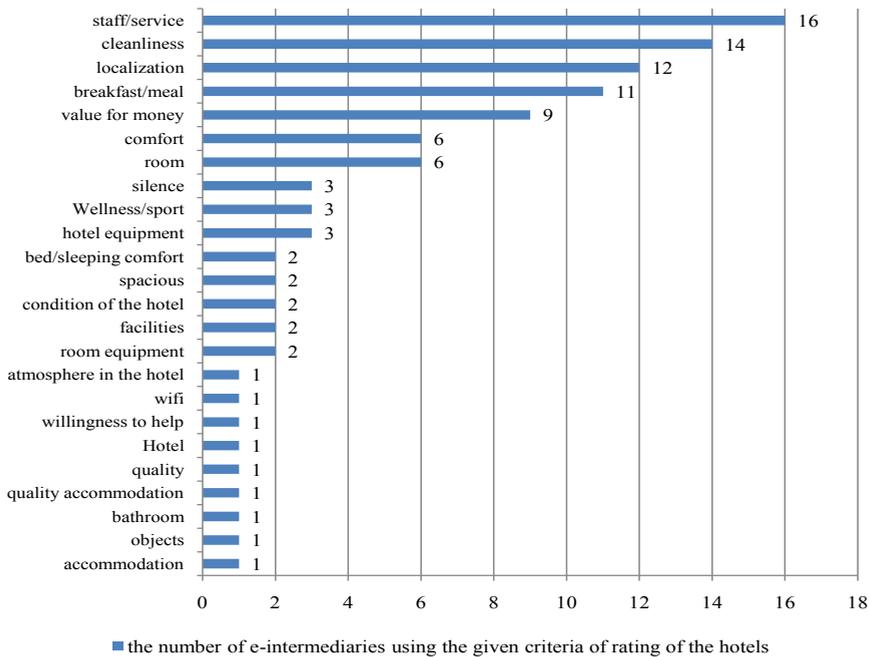


Fig. 3. Criteria of rating of the hotels in the analysed systems

Source: own elaboration.

#### 4. Discussion, limitations and directions for further research

Due to the imperfection of the existing systems of categorization, the hotels are taking a number of actions to reduce the uncertainty for potential customers and encourage them to choose their object. For this purpose they enter into a variety of evaluation systems: certificates, marketing programs, chain standards as well as they submit themselves to the verification of their guests. All of these actions reduce information asymmetry in the market because they enrich customers knowledge about objects of interest. The customer rating (based on reviews) is the only one in which the client is actively involved in the process of evaluating, hence its popularity is so high. The number of reviews for some hotels issued by customers is over several thousand. However, this method, despite the many advantages, has also disadvantages as confirmed by studies (Table 1).

Table 1.

## Advantages and disadvantages of customer ratings of hotels in e-intermediaries

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>– made on the basis of assessments of hotel guests</li> <li>– take into account the quality criteria (eg. service, atmosphere, friendliness)</li> <li>– take into account the criterion of value for money</li> <li>– classify the reviewers due to the purpose of the stay (eg. family, business)</li> <li>– assessments are continuous, and not only during the inspection</li> </ul>	<ul style="list-style-type: none"> <li>– subjectivism of the reviewers</li> <li>– ignore the diversity of needs and expectations of the advisers</li> <li>– significant differences between guests' evaluations (the same hotel for different people can be unique or unsatisfactory)</li> <li>– in some systems lack of verification of the reliability of opinions</li> <li>– enigmatically sounding assessment criteria (eg. quality, room)</li> </ul>

Source: based on own studies and K. Biełuszko, R. Kubicki, A. Pawlicz, *Wpływ kategoryzacji na rozwój elektronicznych kanałów dystrybucji na przykładzie rynku usług hotelarskich w Unii Europejskiej*, „e-mentor” 2015, No. 1 (58), pp. 75–80.

The obtained results show that the assessments made by customers are based on similar criteria but are not consistent with the requirements of official categorization, primarily due to their qualitative nature. Surely, this is what makes them so useful for those who read them. Analysing the criteria in the tested systems of assessment, it should be noted that in the study by Suzuki based on the analysis of 350 thousand reviews, the frequently appearing words are isolated thus setting the desirable criteria of assessment. Among them there are: location, facilities, service, meal, room, lobby, bath, amenity, network, beverage, bed and parking lot have been found. Also, Levy et al.<sup>17</sup> has conducted the analysis of the reviews, only negative though (one-star opinions). Among the characteristics most often subjected to criticism are: front desk staff, bathroom, cleanliness, noise, check-in, parking, restaurants, billing, room size and housekeeping staff. To a large extent, these coincide with the criteria used in the assessment of hotels in the present study and can thus be considered so as to meet the demand for information from the people who read them. The only objections are that in the analysed ratings of e-intermediaries *silence* rarely appears as a criterion (just three systems) although it is relatively important for customers. There is also the total lack in surveyed ratings of the criteria such as *bathroom* and *parking*.

<sup>17</sup> S.E. Levy, W. Duan, S. Boo, *An analysis of one-star online reviews and responses in the Washington, DC, Lodging Market*, "Cornell Hospitality Quarterly" 2013, No. 54 (1), pp. 49–63.

One of the main advantages of the analysed systems of assessment is the presence in as many as nine of them the criterion of value for money important especially for those looking for hotels providing the highest standard and quality at an acceptable level of price.

In addition, an important value for readers is the ability to select categories of the reviewers whose opinions are important for a potential client. In some systems, there exist a possibility of viewing opinions of other hotels from the given adviser allowing the reader to choose those advisers whose expectations and needs are similar. The main limitation of the research is that it does not verify the analysed variables based on examples of opinions, and only examines the formal rules of their issuing instead. Certainly, it could be interesting to examine if and how the assessments of individual objects in a variety of reservation systems differ, which of these systems are the most popular (the largest number of reviews), and whether there is a relationship between the number of opinions about the object and its administrative category.

## **Summary**

The study clearly shows that the customer rating systems are highly heterogeneous. Both the number and type of evaluation criteria, rating scale and definitions of reviewers are the factors which have significantly differentiated the analysed systems. However, this heterogeneity and many other disadvantages such as the subjectivism of advisers, significant discrepancies between reviews et al. do not undermine their usefulness in reducing information asymmetry in the hospitality market and in the decision-making process by the client.

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## OPINIE KLIENTÓW JAKO NARZĘDZIE REDUKCJI ASYMETRII INFORMACJI NA RYNKU HOTELARSKIM

### Streszczenie

Jednym z istotnych etapów procesu zakupowego, także usług hotelarskich, jest poszukiwanie informacji, które powinny być aktualne, wiarygodne i zgodne z zapotrzebowaniem. Współcześnie, tj. w dobie społeczeństwa informacyjnego, źródłem tych informacji nie jest już głównie dostawca usługi, czyli hotel, ale inne osoby, które z owych usług korzystały. Jednak mnogość opinii dostępnych w Internecie sprawia,

że konieczne staje się usystematyzowanie metod zbierania tych opinii, tak, aby jasne było kto jest wystawia oraz według jakich kryteriów i skali.

Celem badań było dokonanie analizy porównawczej metod generowania opinii o hotelach w dostępnych zasobach internetowych. Jako narzędzie badawcze zastosowano krytyczny przegląd literatury oraz eksplorację zasobów internetowych.

Przeprowadzone badania pokazują wyraźnie, iż systemy wystawiania ocen przez klientów są niejednorodne. Zarówno liczba i rodzaj kryteriów oceny, skala oceny, jak i definicje opiniodawców są czynnikami znacznie różnicującymi analizowane systemy. Wśród nich znajdują się takie, w których ocenie poddawane są 3 parametry oraz takie, w których klient ma ocenić aż 14 cech. Owa niejednorodność oraz wiele innych wad wskazanych w niniejszym artykule, takich jak subiektywizm opiniodawców, znaczne rozbieżności między ocenami i in., nie podważa jednak ich przydatności w redukcji asymetrii informacji na rynku usług hotelarskich oraz w procesie podejmowania decyzji przez klienta hotelu.

**Słowa kluczowe:** opinie klientów, recenzje klientów, e-pośrednicy, systemy oceny jakości, kategoryzacja hoteli



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**THE SCIENTIFIC IDENTITY OF TOURISM RESEARCH.  
POLISH VIEWS VERSUS THOSE OF FOREIGN ACADEMIA**

**Abstract**

The aim of this article is to present empirical results of a survey devoted to the issue of the scientific identity of Polish and international scholars of tourism. The survey has a firm theoretical background and the results are presented in the light of achievements of international literature. The article features: 1) a theoretical discussion and an overview of previous research and selected literary sources; 2) a presentation of the results of the author's empirical studies of the scientific identity carried out among Polish and international researchers of tourism; 3) more general conclusions related to the issues addressed in the paper. The empirical research project has the qualitative character (the non-representative survey on a purposeful sample) and was carried out in 2013 and 2014. The project covers two subsamples: international and Polish. The international subsample encompasses around 180 scholars of different scientific grades, age and experience in tourism research. The respondents represent leading public and private institutions (mostly universities as well as national and international tourism scientific associations and independent institutes) from almost 50 countries and all the continents. The Polish subsample includes 90 tourism scholars of various age, profile, experience and academic degree. They are representatives of the main national academic centres and scientific disciplines which deal with the issues related to tourism. The general results suggest that Polish scholars of tourism hold more conservative positions than their international colleagues as far as the recognition of the specific scientific identity of tourism research is concerned. At the same time it should be noted that some similarities in the Polish and international academia's views on the subject in question exist. Finally, it should also be stated that both Polish and international scholars dealing with tourism are internally divided as regards the methodological position of tourism research – es-

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pecially its cognitive and formal status. The article develops certain ideas and findings presented in the previous works by the author focused mainly on the scientific identity of Polish scholars of tourism.

**Keywords:** scientific identity of tourism research, views of Polish and international scholars of tourism

## Introduction

The aim of this paper is to present empirical results of a survey on the issue of the scientific identity of Polish and international scholars of tourism. The article features: 1) a theoretical discussion and an overview of the previous research and selected literary sources; 2) a presentation of the results of the author's empirical studies of the scientific identity carried out among Polish and international researchers of tourism; 3) conclusions related to the issues addressed in the paper – from a more general, methodological and theoretical perspective.

It seems that the problem of the academic identity of tourism researchers is closely related to the traditions of various particular disciplines which have been dealing with tourism issues for decades. The differences between the views of scholars from different countries, schools and disciplines with their paradigms testify to these factors playing an important role in the shaping of researchers' final opinions on the topic in question. The investigation of the said factors begins with a theoretical discussion in the first part of the paper. Having thus set the context, the results are subsequently discussed of the survey project conducted among scholars of tourism of various academic backgrounds from all around the world. In the conclusion, the author makes an attempt to sketch out the main factors, decisive as regards the present methodological situation of tourism research.

The article develops certain ideas and findings presented in the previous papers by the author<sup>1</sup> and focused mainly on the scientific identity of Polish scholars of tourism.

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<sup>1</sup> L. Butowski, *The phenomenology of tourism: in search of the essence of the phenomenon. Towards new paradigms for tourism research*, in: *Tourism Research in a Changing World*, GITUR – Tourism Research Group of Polytechnic Institute of Leiria, eds. F. Dias, J. Kosmaczewska, E. Dziedzic, A. Mogliulo, 2014, pp. 250–265; L. Butowski, *The ontological and epistemological foundations of tourism research. Scientific identity of Polish scholars of tourism*, “Economic Problems of Tourism” 2014, No. 4 (28), pp. 23–38; L. Butowski, ed., *Searching for the scientific identity of tourism research*, Warsaw School of Tourism and Hospitality Management Warszawa 2014.

## 1. Literature review

Tourism research has probably had the problem with its (and its researchers') identity from the very beginning, although it was not loudly expressed at that time. Some authors<sup>2</sup> believe that a scientific analysis of tourism began in the first decades of the 20th century with Stradner's<sup>3</sup>, Glücksman's (who founded in Berlin, in the 1920s, the journal "Archiv für Fremdenverkehr") and especially Hunziker and Krapf's<sup>4</sup> German-language works. In Poland, in 1936 the first academic tourism-related establishment – the 'Tourism Studium' at the Jagiellonian University in Cracow – was founded.<sup>5</sup> Many authors<sup>6</sup> agree that the contemporary study on the methodological and cognitive aspects of tourism research has grown gradually and has been present in the international literature for at least four decades. In the last years, reviews of different opinions on the methodological situation of tourism research have been published, among others, by Babu,<sup>7</sup> Butowski,<sup>8</sup> Ceriani-Sebregondi et al.,<sup>9</sup> Darbellay & Stock,<sup>10</sup> Echtner & Jamal,<sup>11</sup>

<sup>2</sup> Ceriani-Sebregondi G., Chapuis A., Gay J-C., Knafou R., Stock M., Violier P., *Quelle serait l'objet d'une «science du tourisme»?*, "Téoros" 2008, No. 27 (1), pp. 7–13.

<sup>3</sup> J. Stradner, *Der Fremdenverkehr*, Leykam Graz 1905.

<sup>4</sup> W. Hunziker, K. Krapf, *Grundriss der allgemeinen Fremdenverkehrslehre*, Polygraphischer Verlag, Zurich 1942.

<sup>5</sup> J. Wyrzykowski, *Achievements of geographical sciences in Poland in tourism research*, in: *Searching for the scientific identity of tourism research*, ed. L. Butowski, Warsaw School of Tourism and Hospitality Management, Warszawa 2104, pp. 127–144.

<sup>6</sup> D. Airey, *Tourism Education Life Begins at 40*, "Téoros" 2008, No. 27 (1), pp. 27–32; A. Borret, *Discipline d'enseignement, sujet d'études*, "Revue Espaces" 2005, No. 223, pp. 18–20; B. Kadri, *La question du statut scientifique du tourisme : présentation*, <http://teoros.revues.org/345>.

<sup>7</sup> S.S. Babu, *Tourism as Disciplines and Industry. Some comments on the progressing debates*, in: *Tourism Development Revisited. Concepts, Issues and Paradigms*, eds. S.S. Babu, S. Mishra, B.B. Parida, SAGE 2008, pp. 33–53.

<sup>8</sup> L. Butowski, *Tourism – an academic discipline*, "Turyzm" 2011, No. 21/1–2, pp. 17–24; L. Butowski, *The phenomenology of tourism...*; L. Butowski, *The ontological...*; L. Butowski ed., *Searching for...*

<sup>9</sup> G. Ceriani-Sebregondi et al., *Quelle serait...*

<sup>10</sup> F. Darbellay, M. Stock, *Tourism as complex interdisciplinary research object*, "Annals of Tourism Research" 2012, No. 39 (1), pp. 441–458.

<sup>11</sup> C.M. Echtner, T.B. Jamal, *The Disciplinary Dilemma of Tourism Studies*, "Annals of Tourism Research" 1997, No. 24, pp. 868–883.

Hillali,<sup>12</sup> Taillon,<sup>13</sup> Ratz;<sup>14</sup> it should, however, be noted that they focus mainly on the aspects of disciplinarity vs. non-disciplinarity of tourism. Unfortunately, it seems that, despite many efforts, the general problem of the scientific identity of tourism studies is far from conclusion – both in the Anglo-Saxon<sup>15</sup> and the Francophone literature.<sup>16</sup> Three main positions held by the academics can be distinguished: in favour of tourism’s own scientific identity (which could be probably best expressed by the recognition of tourism as a separate discipline), against it and an intermediate option.

The supporters of tourism’s specific academic identity and, consequently, the disciplinarity of tourism studies such as Babu,<sup>17</sup> Bosiacki<sup>18</sup> Goeldner<sup>19</sup> cited in Hall et al.<sup>20</sup> (2004), Goeldner & Ritchie,<sup>21</sup> Jovicic<sup>22</sup>, Leiper,<sup>23</sup> Page,<sup>24</sup>

<sup>12</sup> M. Hillali, *La science du tourisme dans le discours des acteurs internationaux; débat ou polémique?*, “Téoros” 2008, No. 27 (1), pp. 42–50.

<sup>13</sup> J. Taillon, *Understanding tourism as an academic community, study, or discipline*, “Journal of Tourism & Hospitality” 2014, No. 3 (3), pp. 131–136.

<sup>14</sup> T. Rátz, *Crossdisciplinarity or tourismology? The scientific identity of tourism in Hungary*, in: *Searching for the scientific identity of tourism research*, ed. L. Butowski, Warsaw School of Tourism and Hospitality Management, Warszawa 2014, pp. 35–57.

<sup>15</sup> J.R.B. Ritchie, L.R. Sheenan, S. Timur, *Tourism Sciences or Tourism Studies? Implications for the Design and Content of Tourism Programming*, “TÉOROS. Revue de Recherche en Tourisme” 2008, No. 27–1, pp. 33–41.

<sup>16</sup> B. Kadri, *La question...*

<sup>17</sup> S.S. Babu, *Tourism as Disciplines...*

<sup>18</sup> S. Bosiacki (personal communication, 2013, 2014).

<sup>19</sup> C.R. Goeldner, *The evaluation of tourism as an industry and a discipline. Paper presented at the International Conference for Tourism Educators*, University of Surrey Guildford 1988.

<sup>20</sup> M. Hall, A. Williams, A. Lew, *Tourism: Conceptualisations, Institutions and Issues*, in: *A Companion to Tourism*, eds. A. Lew, M. Hall, A. Williams, Blackwell, Oxford 2004, pp. 3–21.

<sup>21</sup> C.R. Goeldner, J.R.B. Ritchie, *Tourism: Principles, Practices, Philosophes*, Hoboken (N.J.): John Wiley & Sons 2006.

<sup>22</sup> Z. Jovicic, *A Plea for Tourismological Theory and Methodology*, “Revue de Tourisme” 1988, No. 43, pp. 2–5.

<sup>23</sup> N. Leiper, *Towards a cohesive curriculum tourism: The case for a distinct discipline*, “Annals of Tourism Research” 1981, No. 8 (1), pp. 69–84; N. Leiper, *Tourism Systems: An Interdisciplinary Study*, “Occasion Papers” 1990, No. 2; N. Leiper, *An Emerging Discipline*, “Annals of Tourism Research” 2000, No. 27, pp. 805–809.

<sup>24</sup> S.J. Page, *Evaluating Research Performance in Tourism: The UK Experience*, “Tourism Management” 2003, No. 24 (4), pp. 607–622.

Ryan,<sup>25</sup> Vicériat, Origet du Cluzeau & Balfet<sup>26</sup> raise different arguments pointing to the need for the recognition of tourism as a discipline. Some of them even proposed names for this new discipline, e.g. *touology* (Leiper<sup>27</sup>), *tourismology* (Jovicic<sup>28</sup>), or *turystologia* (Chłopecki<sup>29</sup>). Stafford<sup>30</sup> proposes a new term *téorologie*, related to a field of study focused on tourism issues. He also identifies four paradigms (nominalist, economic-spatial, cultural, normative) which structure the research on tourism. Hoerner,<sup>31</sup> and Hoerner & Siccart<sup>32</sup> appeal for the recognition of *tourismologie* as a multidisciplinary, human and applied science of a synthetic character, which focuses on voyage (in different aspects) as its research object. Leiper in his works argues for an academic identity and disciplinarity of tourism considering its social acceptance, which is manifested in the recognition of university curricula (in some countries, e.g. Australia, Canada, France, India, Poland, the UK, the USA – at least from the 1970s) at different levels of study, together with accompanying research programmes. As cited in Babu,<sup>33</sup> quite similar views, though sometimes in different contexts, are presented by Ritchie et al.,<sup>34</sup> and Hall, Williams & Lew<sup>35</sup>

<sup>25</sup> C. Ryan, *Tourism a Mature Subject Discipline?*, “Pacific Tourism Review” 1997, No. 1 (1), pp. 3–5; C. Ryan, *Academia- industry tourism research links: states of confusion*, “Pacific Tourism Review” 2001, No. 5 (3/4), pp. 83–96.

<sup>26</sup> P. Vicériat, C. Origet du Cluzeau, M. Balfet, *Ensemble pour la reconnaissance d’une science du tourisme*, “Revue Espaces” 2005, No. 224, pp. 14–15.

<sup>27</sup> N. Leiper, *Towards a cohesive...*

<sup>28</sup> Z. Jovicic, *A Plea for Tourismological...*

<sup>29</sup> J. Chłopecki, *Turystologia jako dyscyplina naukowa*, in: *Turystyka w badaniach naukowych*, eds. R. Winiarski, W. Alejski, AWF, WSIiZ, Kraków–Rzeszów 2005, pp. 263–274.

<sup>30</sup> J. Stafford, *Le paradigme culturaliste en téorologie: étude, analyse et critique*, “Téoros” 1985, No. 7 (1), pp. 5–8.

<sup>31</sup> J-M. Hoerner, *Pour la reconnaissance d’une science touristique*, “Revue Espaces” 2000, No. 173, pp. 18–20; J-M. Hoerner, *Pour une nouvelle définition du tourisme*, “Revue Espaces” 2002, No. 224, pp. 15–20; J-M. Hoerner, *Contribution à la science du tourisme*, Retrieved October 23, 2014, from TEOROS web site: <http://teoros.revues.org/355> Téoros, 27 (1), 2008.

<sup>32</sup> J-M. Hoerner, C. Siccart, *La science du tourisme*, Balzac Editeur 2003.

<sup>33</sup> S.S. Babu, *Tourism as Disciplines...*

<sup>34</sup> J.R.B. Ritchie, L.R. Sheenan, S. Timur, *Tourism Sciences...*

<sup>35</sup> M. Hall, A. Williams, A. Lew, *Tourism: Conceptualisations, Institutions and Issues*, in: *A Companion to Tourism*, eds. A. Lew, M. Hall, A. Williams, Blackwell, Oxford 2004, pp. 3–21.

and even by Tribe<sup>36</sup> who – being one of the most staunch opponents of a disciplined tourism – proposes bifurcation (in academic curricula) of the “body of tourism” into “Tourism Business Studies” and “Tourism Development Studies” (Babu<sup>37</sup>).

Other authors, such as Barnett<sup>38</sup> and Cuffy, Tribe & Airey<sup>39</sup> state that in countries where tourism education on a university level has been established for a long time, more abstract competences and critical thinking are expected. In the emerging markets, however, a more practical approach is dominant, as mentioned by Tooman, Müristaja & Holleran<sup>40</sup>, Shariff<sup>41</sup> and Rátz & Kátay.<sup>42</sup> Jovicic<sup>43</sup> calls for *tourismology* as a distinct discipline which could join and synthesise fragmented tourism research. He notes that “the observation of individual elements independently of the whole has resulted in a mistaken definition of tourism as an economic, geographic or sociological phenomenon” Stafford<sup>44</sup> proposing his *téorologie* believes that such a field of inquiry will be able to integrate many elements from other disciplines at present scattered in time and space. Some other authors (Cohen<sup>45</sup>,

<sup>36</sup> J. Tribe, *The Indiscipline of Tourism*, “Annals of Tourism Research” 1997, No. 24, pp. 638–654; J. Tribe, *The RAE-ification of tourism research in the UK*, “International Journal of Tourism Research” 2003, No. 5, pp. 225–234.

<sup>37</sup> S.S. Babu, *Tourism as Disciplines...*, p. 41.

<sup>38</sup> R. Barnett, *The idea of higher education*, “Buckingham: The Society for Research into Higher Education”, Open University Press 1990; R. Barnett, *Higher education, a critical business*, “Buckingham: The Society for Research into Higher Education”, Open University Press 1997.

<sup>39</sup> V. Cuffy, J. Tribe, D. Airey, *Lifelong Learning for Tourism*, “Annals of Tourism Research” 2012, No. 39 (3), pp. 1402–1424.

<sup>40</sup> H. Tooman, H. Müristaja, J.N. Holleran, *Developing a Curriculum for the Needs of the Tourism Sector in a Transition Country, the Example of Pärnu College of the University of Tartu*, Paper presented at the 25th EuroChrie Conference, Leeds, 25–27 October 2007.

<sup>41</sup> N.M. Shariff, *Reforming Hospitality Program of Higher Educational Institutions*, “Anatolia – An International Journal of Tourism and Hospitality Research” 2011, No. 22 (1), pp. 125–128.

<sup>42</sup> T. Rátz, Á. Kátay, *Skills and Competencies in Tourism Employment – A Cultural Analysis of Expectations and Experiences*, in: *(Inter)cultural Aspects of Tourism Development*, eds. T. Rátz, Cs. Sárdi, Kodolányi János University College, Székesfehérvár 2007, pp.89–100.

<sup>43</sup> Z. Jovicic, *A Plea for Tourismological...*, p. 3.

<sup>44</sup> J. Stafford, *Connaissances en tourisme et reconnaissance sociale*, “Téoros” 1992, No. 11 (1), pp. 44–46.

<sup>45</sup> E. Cohen, *Rethinking the sociology of tourism*, “Annals of Tourism Research” January–March 1979, pp. 110–111.

Comic<sup>46</sup>, Rogoziński<sup>47</sup>) agree with such opinions arguing that the study of tourism as the whole will suffer from a lack of in-depth analyses (analyses which should lead to the construction of stronger theoretical foundations) as long as the research is fragmented among various disciplines with their specific methods of investigation (Echtner & Jamal<sup>48</sup>). They state that only through an integration of various branches of tourism research its theory will develop. In a similar context, Ritchie et al.<sup>49</sup> propose their “core-foundation model” – used to distinguish between a hypothetical tourism theory (theories) and the theories of the foundation disciplines (e.g. sociological, geographical, economic). Trying to prove, with the use of formal analysis, that tourism has already been properly theorized, Mazurkiewicz<sup>50</sup> goes even further than the above mentioned scholars. A large contribution to the development of theoretical foundations of tourism studies has been made by the MIT (Mobility, Itinerary, Tourism) team, which started its activity in 1993 (Ceriani-Sebregondi et al.<sup>51</sup>).

On the other hand, there are many opponents of tourism’s own academic identity and disciplinarity who raise primarily methodological arguments against tourism studies with their specific academic identity. The numerous scholars such as Bowedes,<sup>52</sup> Borret,<sup>53</sup> Gołembski,<sup>54</sup> Pearce,<sup>55</sup> Tribe<sup>56</sup> state that tourism does not have a commonly accepted definition and its own unique theories;

<sup>46</sup> D. Comic, *Tourism as a Subject of Philosophical Reflection*, “Revue de Tourisme” 1989, No. 44, pp. 6–13.

<sup>47</sup> K. Rogoziński, *Tourism as a Subject of Research and Intergration of of Sciences*, “Problemy Turystyki” 1985, No. 4, pp. 7–19.

<sup>48</sup> C.M. Echtner, T.B. Jamal, *The Disciplinary...*

<sup>49</sup> J.R.B. Ritchie, L.R. Sheenan, S. Timur, *Tourism Sciences...*

<sup>50</sup> L. Mazurkiewicz, *Czy istnieje teoria turystyki*, „Problemy Turystyki” 2005, No. 3/4, pp. 155–167; L. Mazurkiewicz, *Wybrane teorie oraz metody badawcze turystyki*, Studia i Monografie AWF, Warszawa 2012.

<sup>51</sup> G. Ceriani-Sebregondi, et al., *Quelle serait...*

<sup>52</sup> T. Bowedes, *Development of advanced tourism studies in Holland*, “Annals of Tourism Resarch” 1982, No. 9, pp. 35–51.

<sup>53</sup> A. Borret, *Discipline...*

<sup>54</sup> G. Gołembski, personal communication, 2013.

<sup>55</sup> P.L. Pearce, *Defining Tourism Study as a Specialism: A Justification and Implications*, “Téoros International 1” 1993, pp. 25–32.

<sup>56</sup> J. Tribe, *The Indiscipline...*

its weakest point from the ontological and epistemological perspectives. Even Goeldner & Ritchie<sup>57</sup> seeing the tourism's academic identity mainly within a set of management sciences admit that tourism lacks a unique definition. Witt, Broke & Buckley<sup>58</sup> add that tourism research "will remain rather dynamic, variegated and at times internally conflictual." Franklin & Crang<sup>59</sup> analysing the nature of tourism knowledge creation and the research community state that scholars are often under the dominance of politics and industry-sponsored research. Lynch & Brown<sup>60</sup> cited in Babu<sup>61</sup> add an opinion that the "government and business persons believe that theoretical ideas are just 'excess baggage' of little value to practical realities of tourism management." Athiyaman<sup>62</sup> criticises many a tourism researcher (especially the ones conducting tourism demand studies) for not contributing to the development of theoretical knowledge. Meethan<sup>63</sup> assesses critically the content of journals, books and conferences which "remain un-theorised, eclectic and disparate." A similar view is presented by Weiler,<sup>64</sup> who does not agree with Jafari's<sup>65</sup> observation that tourism research is no longer atheoretical. Baretje cited in Knafou<sup>66</sup> states categorically that tourism is not and will never be a science, but a form of people's activity. In order to support

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<sup>57</sup> C.R. Goeldner, J.R.B. Ritchie, *Tourism...*

<sup>58</sup> S. Witt, M. Broke, P. Buckley, *The management of International Tourism*, Unwin Hyman, London 1991.

<sup>59</sup> A. Franklin, M. Crang, *The Trouble with Tourism and Travel Industry*, "Tourist Studies" 2001, No. 1 (1), Vol. 22.

<sup>60</sup> P. Lynch, R. Brown, *Utility of Large-scale Leisure Research Agendas*, "Managing Leisure" 1999, No. 7(4), pp. 63–77.

<sup>61</sup> S.S. Babu, *Tourism as Disciplines...*, p. 37.

<sup>62</sup> A. Athiyaman, *Knowledge development in tourism: Tourism demand research*, "Tourism Management" 1997, No. 18 (4), pp. 221–228.

<sup>63</sup> K. Meethan, *Tourism in Global Society: Place, Culture and Consumption*, 2, Palgrave, New York 2001.

<sup>64</sup> B. Weiler, *Tourism Research and Theories: A Review*, in: *Tourism and Hospitality Industry in the 21st Century*, eds. A. Lockwood, S. Medlik, Butterworth-Heinemann, London 2003, pp. 82–93.

<sup>65</sup> J. Jafari, *Research and scholarship: The basis of tourism education*, "Journal of Tourism Studies" 1990, No. 1, pp. 33–41.

<sup>66</sup> R. Knafou, *La recherche...*

the opinions which refuse to recognise tourism as a discipline, Tribe<sup>67</sup> refers to Kuhn's<sup>68</sup> classical works concerning the scientific paradigm and calls upon the notion of "normal science" – introduced by Kuhn – to describe the mature state of scientific disciplines. He states that tourism studies cannot be recognised as Kuhnian normal science and that tourism is at most at the pre-paradigm stage. Moreover, on the basis of Kuhn's model Echtner & Jamal<sup>69</sup> add that tourism studies will probably remain in the pre-paradigm phase due to the incommensurability of different disciplinary paradigms which have dealt with them.

Apart from the above mentioned arguments against tourism's own academic identity and disciplinarity there is another one raised up by Tribe<sup>70</sup> in his well-known work concerning the truth about tourism. The author states that "disciplines may perform a selector role determining what is included and excluded in both the framing of research and its execution." In this context, Tribe, on the basis of Aronowitz & Giroux's<sup>71</sup> works, refers to the discipline's "tyrannical role" limiting research on tourism rather than supporting it. To illustrate his point, Tribe mentions Rojek & Urry's<sup>72</sup> and Franklin & Crang's<sup>73</sup> works, in which the authors identify the tyrannical role of economics in tourism research. It seems, however, that this opinion can be also reinterpreted in the context of tourism studies. An attempt to present such an interpretation is made in the conclusion to this paper.

Between these two opposite positions, a set of intermediate views, not so strong in their support or criticism of the tourism's scientific identity, can be distinguished. Some scholars, such as Ateljevic, Pritchard & Morgan,<sup>74</sup> Babu,<sup>75</sup>

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<sup>67</sup> J. Tribe, *The truth about tourism*, "Annals of Tourism Research" 2006, No. 33 (2), pp. 360–381.

<sup>68</sup> T.S. Kuhn, *The Structure of Scientific Revolutions*, 3rd ed., University of Chicago 1996.

<sup>69</sup> C.M. Echtner, T.B. Jamal, *The Disciplinary...*

<sup>70</sup> J. Tribe, *The truth...*, p. 366.

<sup>71</sup> S. Aronowitz, H. Giroux, *Postmodern education: politics, culture and social criticism*, University of Minnesota Press, Minneapolis 1991.

<sup>72</sup> C. Rojek, J. Urry, *Touring cultures*, Routledge, London 1997.

<sup>73</sup> A. Franklin, M. Crang, *The Trouble with Tourism and Travel Industry*, "Tourist Studies" 2001, No. 1 (1), Vol. 22.

<sup>74</sup> I. Ateljevic, A. Pritchard, N. Morgan, *The critical turn in tourism studies: innovative research methodologies*, Elsevier, Amsterdam, Netherlands 2007.

<sup>75</sup> S.S. Babu, *Tourism as Disciplines...*

Cazes,<sup>76</sup> Dann, Nash & Pearce,<sup>77</sup> Jafari<sup>78</sup> and Knafou<sup>79</sup> agree that tourism can be unquestionably treated as a field of study and they are ready to accept the statement that tourism studies are in the process of “gaining” maturity. Such an opinion at least partially corresponds to the previously mentioned Kuhn’s paradigm model of science with its pre-paradigm phase where a future discipline (the studies of tourism) relies on various paradigms developed within other disciplines (Szubert-Zarzewny<sup>80</sup>). Echtner & Jamal<sup>81</sup> remaining quite sceptical to the possibility of using Kuhn’s paradigmatic model as the theoretical grounds for the separation of tourism studies admit that one cannot exclude the possibility of Kuhnian scientific revolution “in which a group of researchers breaks away from disciplinary boundaries and works to establish a distinct disciplinary matrix for tourism” taking place.

In this context, it is not only the question whether or not tourism studies can achieve their own, mature academic identity and be recognised as an independent discipline, but also – when. It seems that one of the most prominent proponents of such a position is Jafari<sup>82</sup> who, identifying four development platforms of tourism studies, points to the knowledge-based platform being chronologically the latest and thus, the most actual. The same author referring to tourism claims: “Its scientific journey is clearly in progress, aiming at new frontiers, heading to new horizons” (cited in Babu<sup>83</sup>). Quite an optimistic perspective is also presented by Echtner & Jamal<sup>84</sup> when they suggest using (in opposition to Kuhn’s paradigm

<sup>76</sup> G. Cazes, *À propos de tourismologie. La science par autoproclamation*, “Revue Espaces” 2001, No. 187, pp. 46–53.

<sup>77</sup> G. Dann, D. Nash, P. Pearce, *Methodology in Tourism Research*, “Annals of Tourism Research” 1988, No. 18, pp. 155–169.

<sup>78</sup> J. Jafari, *Research...*

<sup>79</sup> R. Knafou, *La recherche en tourisme s’organise*, „Revue Espaces” 2005, No. 225, pp. 11–14.

<sup>80</sup> U. Szubert-Zarzewny, *Kilka uwag o potrzebie autonomizacji „nauki o turystyce”*, Zeszyty Naukowe AWF w Krakowie No. 81, Kraków 2001, pp. 75–79.

<sup>81</sup> C.M. Echtner, T.B. Jamal, *The Disciplinary...*, p. 876.

<sup>82</sup> J. Jafari, *Research...*; J. Jafari, *The Scientification of Tourism*, in: *Hosts and Guests Revisited: Tourism Issues in the 21st Century*, eds. V.L. Smith, M.A. Brent, Cognizant Communication Corporation, New York 2001, pp. 28–41.

<sup>83</sup> S.S. Babu, *Tourism as Disciplines...*, p. 39.

<sup>84</sup> C.M. Echtner, T.B. Jamal, *The Disciplinary...*, p. 878.

model) Bernstein's<sup>85</sup> approach concerning the methodological interrelations between natural (*Naturwissenschaften*) and social (*Geisteswissenschaften*) sciences.

So far the discussion has not mentioned another group of commonly-shared opinions, namely, those pointing to the future of tourism studies as a domain of inter- or cross-disciplinary approaches. Quite many scholars, such as Gołembski (personal communication, 2013), Liszewski,<sup>86</sup> Pearce & Butler,<sup>87</sup> Tribe,<sup>88</sup> Witt et al.<sup>89</sup> support such views arguing that they are consistent with the post-modern call for hybridisation/post disciplinarity; a point which answers the need for creativity and innovation. Other proponents of this option postulate "more pragmatic institutional perspectives on tourism's disciplinarity with scholarly potential and possibilities offered by post-disciplinarity" (Babu<sup>90</sup>). Kadri<sup>91</sup> believes that interdisciplinarity and cross-disciplinarity would allow tourism research to reduce its methodological handicap in relation to traditional disciplines. Dewailly<sup>92</sup> remaining quite sceptical towards *tourismologie*, argues for transdisciplinarity in tourism research and proposes a "federative" paradigm able to encompass different anthropological, geographical and historical aspects as foundations for this new science. Moreover, for certain researchers even inter- and multi-disciplinary approaches are already unsatisfactory. Coles, Hall & Duvall<sup>93</sup> claim that if studies of tourism are to reflect contemporary conditions, "they should move away from traditional approaches to more flexible forms of knowledge production." The same authors<sup>94</sup> argue for a "hybrid approach" in tourism stud-

<sup>85</sup> R. Bernstein, *Beyond Objectivism and Relativism: Science, Hermeneutics and Praxis*, University of Pennsylvania, Philadelphia 1991.

<sup>86</sup> S. Liszewski, *Nauka czy nauki o turystyce*, „Turyzm” 2010, No. 20 (2), pp. 37–45.

<sup>87</sup> P.L. Pearce, R. Butler (eds.), *Tourism Research: Critiques and Challenges*, Routledge, London 1993.

<sup>88</sup> J. Tribe, *The truth...*

<sup>89</sup> S. Witt, M. Broke, P. Buckley, *The management...*

<sup>90</sup> S.S. Babu, *Tourism as Disciplines...*, p. 36.

<sup>91</sup> B. Kadri, *La question...*

<sup>92</sup> J.-M. Dewailly, *Géographie du tourisme. Pègrinité ou chaos?*, L'Harmattan, Paris 2006; J.-M. Dewailly, *Complexité touristique et approche transdisciplinaire du tourisme*, "Téoros" 2008, No. 27 (1), pp. 22–26.

<sup>93</sup> T. Coles, M. Hall, D. Duvall, *Mobilising tourism: A Post Disciplinary Critique*, "Tourism Recreation Research" 2005, No. 31, 30 (2), pp. 31–42.

<sup>94</sup> *Ibidem*, p. 39.

ies. Nevertheless, it seems that, despite their appealing character, inter-, trans-, multi- and cross-disciplinary as well as hybrid approaches in tourism studies also have weak points, this to be discussed in the conclusion of the article.

The discussion in this section was only indicative and not meant to describe the issue comprehensively. On the other hand, it seems that during the last few years, the exchange of views on this topic has diminished; it has often been limited to reviewing works while omitting the presentation of their authors' positions. It probably suggests that the opponents and supporters of tourism's academic identity stay in their trenches and neither side is ready to compromise. Taking into account these circumstances and the apparent impossibility of achieving a consensus, a new approach is proposed in order to solve the problem in question. It offers a new insight based on a survey conducted among tourism scholars from all around the world.

## **2. In search of the scientific identity of tourism research**

When we speak of the scientific identity (both in the ontological and in the epistemological context) of the studies of tourism, we should be looking for answers to the following research questions: 1) what should constitute the research object of the studies of tourism (ontological perspective); 2) in what wider context and aspect is this research object located; 3) in what way is research conducted and what do we want to learn (epistemological perspective); 4) with which scientific tradition do we identify ourselves; 5) within what wider paradigms do we conduct our research; and, 6) the output of which scientific discipline enriches the results of our research? The answers to at least some of these questions have been sought in the literature overview and in the empirical study and they will be presented in conclusion to this paper.

### **Research method**

In order to analyse the problem of the scientific identity of tourism research, a three-stage research framework has been adopted, commencing with a directed literature review, investigating different positions on the subject followed by a qualitative survey of a purposeful sample of tourism academics and concluding with a further analysis of the literature, this time confronting empirical findings with identified scholars stances.

Table 1

International respondents by continents and countries

Continent	Number of respondents	Countries/ regions	Number of respondents
Africa	5	RSA	4
Asia	12	China, India & Japan	6
Australia & Oceania	7	Australia & New Zealand	7
Europe	126	Austria, Germany & Switzerland	20
		Belgium & Netherlands	8
		Central & Eastern Europe (without Poland)	17
		France	13
		Scandinavia	24
		Southern Europe	31
		UK	13
North & South America	23	USA & Canada	19
Data non-available	8	Other countries	19
Poland	89		

Source: personal findings.

The sample includes respondents representing different disciplines, such as: geography, economics and business studies, management and marketing, regional studies, recreation, sport and leisure studies, sociology and anthropology, other social sciences and humanities. When constructing the sample, the principles similar to those adopted by Tribe<sup>95</sup> and McKercher & Prideaux<sup>96</sup> were applied, although the present sample is bigger. The whole sample consists of two subsamples: international academics and Polish scholars of tourism. The “international” subsample includes about 180 scholars of different scientific grades (master’s degree holders: 24%, Ph.D. holders: 39%, associate professors: 17% and full professors: 20%), age and experience in tourism research. All of them have been asked to state whether they deal with tourism as the main (73% of respondents) or side (27%) area of their academic interests. The international respondents

<sup>95</sup> J. Tribe, *Tribes, territories and networks in the tourism community*, “Annals of Tourism Research” 2010, No. 37 (1), pp. 7–33.

<sup>96</sup> B. McKercher, B. Prideaux, *Academic myths of tourism*, “Annals of Tourism Research” 2014, No. 46, pp. 16–28.

represent the leading public and private institutions (mostly universities as well as national and international tourism scientific associations and independent institutes) from almost 50 countries and all the continents – Table 1. (Africa: 3% of respondents, Asia: 6%, Australia & Oceania: 4%, Europe: 73%, Americas: 14%). The “international” questionnaires were distributed from April to November 2014 via e-mail.

The Polish subsample consists of 89 tourism scholars of various age, profile, experience and academic degree. They are representatives of the main national academic centres and scientific disciplines dealing with tourism-related issues (Table 2). 86% of the Polish respondents have stated that they deal with tourism as the main area of their scientific interests, while the remaining 14% treat tourism as a side field. Polish scholars were surveyed between June and December 2013.

Table 2

Structure of Polish subsample by academic specialisations, academic degree, and age (in %)

Respondents by academic specialisations	Economics	Geographic sciences	Physical Culture & Sport	Other disciplines
Part of the sample	34	28	20	18
Respondents by academic degree	MA	Ph.D.	Associate Professor	Full Professor
Part of the sample	12	54	25	9
Respondents by age	≤ 35 years of age		ages 36–50	ages > 50
Part of the sample	11		28	61

Source: personal findings.

The main body of the questionnaire consists of a series of structured questions concerning the academic identity of researchers and their methodological position towards tourism studies. The survey has been intended to answer the questions concerning: 1) the settlement of the studies of tourism within various scientific paradigms; 2) relationships of tourism scholars with various scientific traditions (scientific fields and disciplines); and, 3) the status and the methodological maturity of the studies of tourism. The concluding question reads: should the studies of tourism gain the status of an autonomous academic discipline? Additionally, respondents have been asked to provide short comments justifying their opinions.

**Analysis – Polish sample**

The results of the survey allow certain observations as regards the scientific identity of tourism scholars.

1. Scientific paradigms in the studies of tourism:
  - a) the majority of respondents (63%) claim that they conduct their research projects within the paradigms of traditional scientific disciplines; 24% of the respondents, however, state that they use specific paradigms of the studies of tourism – Figure 1, (13% has not expressed an opinion on this matter);
  - b) it seems, also, that the bigger the theoretical output of a given discipline, the bigger the scholars’ attachment to its paradigms (Economics – 86%, Geography – 63%, Physical Culture & Sport – 35%) – Table 3;

Table 3

Scientific paradigms in the studies of tourism by disciplines according to Polish respondents (in %)

Disciplines	Traditional Paradigms	Specific tourism studies paradigms	Uncertain
Economics	86	11	3
Geography	63	29	8
Physical Culture & Sports	35	41	24
Other disciplines	50	21	29

Source: personal findings.

- c) the group of Full Professors (37%) and Ph.D. holders (28%) is relatively the most eager to recognise a new paradigm of the studies of tourism; the majority of the representatives of associate professors (68%) claim that their research projects on tourism are conducted within paradigms of the traditional disciplines, the representatives of master’s degree declare the highest number (27%) of the “uncertain” responses (Table 4).

Table 4

Scientific paradigms in the studies of tourism  
by scientific degrees among Polish respondents (in %)

Scientific degree	Traditional Paradigms	Specific tourism studies paradigms	Uncertain
Master's	64	9	27
Ph.D.	61	28	11
Associate Professor	68	18	14
Full Professor	63	37	0

Source: personal findings.

2. Tourism scholars and their relationships with various scientific traditions:
  - a) a slight (relatively) majority of the respondents claim that, when doing research on tourism, they feel they represent their mother disciplines (50%), but 41% of the respondents state that they represent the Studies of Tourism understood as a new discipline (Figure 2), 9% stated that they were “uncertain”;
  - b) it seems that the scholars who originate from the disciplines dealing with tourism research for a longer period of time (i.a. Economics, Geography, Physical Culture & Sports) are relatively more eager to call themselves representatives of the Studies of Tourism than scholars from other disciplines (Table 5);

Table 5

Polish researchers of tourism as representatives of traditional disciplines  
or the Studies of Tourism by represented discipline (in %)

Scientific disciplines	Traditional disciplines	Studies of Tourism	Uncertain
Economics	52	48	0
Geography	42	42	16
Physical Culture & Sport	47	47	6
Other disciplines	62	19	19

Source: personal findings.

- c) it also seems that there is a certain correlation between the academic degree and the eagerness to call oneself a representative of the Studies of Tourism; the higher the academic degree of a person (Full Professors, associate professors), the more eager the person to call himself or herself a representative of the Studies of Tourism (Table 6).

Table 6

Polish researchers of tourism as representatives of traditional disciplines or the Studies of Tourism by scientific degrees (in %)

Scientific degree	Traditional disciplines	Studies of Tourism	Uncertain
Master's	46	36	18
Ph.D.	55	35	10
Associate Professor	46	50	4
Full Professor	38	62	0

Source: personal findings.

3. The status of the Studies of Tourism as an autonomous scientific discipline (the term “Studies of Tourism” is used in this article in the broad sense, i.e. encompassing both the theoretical and the applied research on tourism (cf. Ritchie, Sheehan and Timur<sup>97</sup>).
  - a) quite an apparent majority (49%) of the respondents state that the Studies of Tourism deserved the status of an autonomous scientific discipline; 32% of the respondents hold the opposing view, the remaining 19% have an unclear opinion on this matter;
  - b) 37% of the opponents of the autonomy of the Studies of Tourism held a Full Professor's degree (but it is worth mentioning that at the same time half of them declared ‘yes’ for tourism as an autonomous discipline), the proponents were mostly representatives of the remaining degrees (Table 7);

Table 7

Studies of Tourism as an autonomous discipline by scientific degrees according to Polish scholars (in %)

Scientific degree	Yes	No	Uncertain
Master's	55	27	18
Ph.D.	49	35	16
Associate Professor	50	27	23
Full Professor	37	37	26

Source: personal findings.

<sup>97</sup> J.R.B Ritchie, L.R. Sheehan, S. Timur, *Tourism Sciences or Tourism Studies? Implications for the Design and Content of Tourism Programming*, “Téoros. Revue de Recherche en Tourisme” 2008, No. 27–1, pp. 33–41.

- c) the majority of the scholars who had shorter experience with research on tourism were in favour of the separation of the Studies of Tourism as an autonomous discipline; the scholars with longer experience were equally divided between the two options (Table 8);

Table 8

Studies of Tourism as an autonomous discipline  
by years of experience in researching tourism in Polish subsample (in %)

Experience in tourism research	Yes	No	Uncertain
≤ 10 years	64	14	22
> 10 years	41	41	18

Source: personal findings.

- d) younger scholars were more eager to recognise the autonomisation of the Studies of Tourism than their older colleagues (Table 9).

Table 9

Studies of Tourism as an autonomous scientific discipline  
by age of researcher in Polish subsample (in %)

Age of researchers	Yes	No	Uncertain
≤ 35 years of age	50	20	30
ages 36–50	44	36	20
ages > 50	50	33	17

Source: personal findings.

The results of the survey in the Polish subsample allow a formulation of more general conclusions:

1. A significant majority of the respondents (63%) claim that they conduct their research projects on tourism within various paradigms of the “traditional” scientific disciplines. Only 24% express the opinion that they base on the specific paradigms which belong to the studies of tourism.
2. At the same time, a slight majority of the respondents (50%) consider themselves representatives of the traditional scientific disciplines, however as much as 41% of the respondents are ready to call themselves representatives of the Studies of Tourism. It is worth noticing that the percentage of those ready to call themselves representatives of the Studies of Tourism is much

- higher than the percentage of those who are ready to acknowledge the existence of the specific paradigms of the studies of tourism.
3. Finally, almost half of the respondents (49%) are ready to formally recognise the Studies of Tourism as an autonomous scientific discipline (Tourism does not have that status in the Polish system of sciences); 32% hold the opposing view.
  4. The analysis reveals a strange inconsistency in the responses of the informants regarding the scientific (and methodological) identity and the formal status of the Studies of Tourism. On the one hand, they quite clearly advocate the autonomy of the Studies of Tourism, on the other hand, they seem to be attached to the paradigms of other disciplines of which they themselves feel representatives (Figure 1).

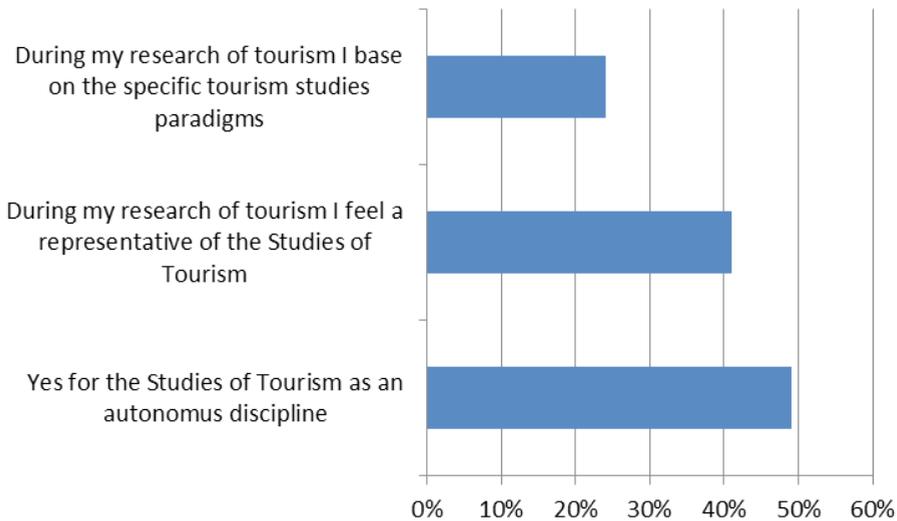


Fig. 1. The scientific identity of tourism research according to Polish respondents  
Source: personal findings.

**Analysis – international subsample**

1. Scientific paradigms in the studies of tourism:
  - a) the majority of respondents (50%) claim that they conduct their research projects within the paradigms of traditional scientific disciplines; 45% of the re-

- spondents, however, state that they use the specific paradigms of the studies of tourism – Figure 2, (5% has not expressed an opinion on this matter);
- b) the bigger the theoretical output of a given discipline, the bigger the scholars' attachment to its paradigms (Economics – 55%, Geography – 49%, Physical Culture & Sport – 39%) – Table 10;

Table 10

Scientific paradigms in the studies of tourism  
by disciplines according to international scholars (in %)

Disciplines	Traditional Paradigms	Specific tourism studies paradigms	Uncertain
Economics	55	42	3
Geography	49	44	7
Physical Culture & Sport	39	44	17
Other disciplines	51	47	2

Source: personal findings.

- c) the group of full professors (55%) and Master's Degree holders (52%) is relatively the most eager to recognise a new paradigm of the studies of tourism; on the other hand, the representatives of Ph.D. holders (63%) and associate professors (47%) claim that their research projects on tourism are conducted within the paradigms of the traditional disciplines (Table 11).

Table 11

Scientific paradigms in the studies of tourism  
by scientific degrees in international subsample (in %)

Scientific degree	Traditional Paradigms	Specific tourism studies paradigms	Uncertain
Master's	38	52	10
Ph.D.	63	35	2
Associate Professor	47	46	7
Full Professor	39	55	6

Source: personal findings.

2. Tourism scholars and their relationships with various scientific traditions:
- a) a minority of the respondents claim that when doing research on tourism they feel they are representatives of their mother disciplines (33%), while

a significant majority (59%) of the respondents state that they represent the Studies of Tourism (Figure 2); 8% are “uncertain”;

- b) 75% of the respondents who represent the Physical Culture & Sport sciences claim that they feel they are representatives of the Studies of Tourism; in other groups of disciplines respective indices are lower but all of them have exceeded the level of 50% (Table 12);

Table 12

International researchers of tourism as representatives of traditional disciplines or the Studies of Tourism by represented discipline (in %)

Scientific disciplines	Traditional disciplines	Studies of Tourism	Uncertain
Economics	37	54	9
Geography	37	61	2
Physical Culture & Sport	25	75	0
Other disciplines	32	56	12

Source: personal findings.

- c) there are some significant differences between scholars (analysed by scientific grades) in terms of their attachment to their mother disciplines or to the new Studies of Tourism; respondents from the Full Professors group are the most eager (76%) to call themselves representatives of the Studies of Tourism; on the other hand, Ph.D. holders are relatively more attached to their mother disciplines (Table 13);

Table 13

International researchers of tourism as representatives of traditional disciplines or the Studies of Tourism by scientific degrees (in %)

Scientific degree	Traditional disciplines	Studies of Tourism	Uncertain
Master's	29	64	7
Ph.D.	47	47	6
Associate Professor	30	59	11
Full Professor	15	76	9

Source: personal findings.

3. The status of the Studies of Tourism as an autonomous scientific discipline:
  - a) an apparent majority (53%) of the respondents state that the Studies of Tourism deserve the status of an autonomous scientific discipline;

- 36% of the respondents hold the opposing view, while the remaining 11% does not have a clear opinion on this matter;
- b) the holders of Full Professor's degree constitute the highest share (47%) of the opponents of the autonomy of the Studies of Tourism; the proponents are mostly holders of the remaining degrees (Table 14);

Table 14

Studies of Tourism as an autonomous discipline  
by scientific degrees in international subsample (in %)

Scientific degree	Yes	No	Uncertain
Master's	60	33	7
Ph.D.	49	33	18
Associate Professor	62	31	7
Full Professor	44	47	9

Source: personal findings.

- c) the percentage of those in favour of the Studies of Tourism as an autonomous discipline is similar in both groups (by years of experience in tourism research), although among scholars with longer experience as much as 41% are against it (Table 15);

Table 15

Studies of Tourism as an autonomous discipline  
by years of experience in researching tourism in international subsample (in %)

Experience in tourism research	Yes	No	Uncertain
≤ 10 years	54	29	17
>10 years	52	41	7

Source: personal findings.

- d) the older and the youngest of the respondents are more eager to recognise the autonomisation of the Studies of Tourism than their middle-aged colleagues (Table 16).

Table 16

Studies of Tourism as an autonomous scientific discipline  
by the age of researcher in international subsample (in %)

Age of researcher	Yes	No	Uncertain
≤35 years of age	54	29	17
ages 36–50	49	40	11
ages >50	58	34	8

Source: personal findings.

The results of the survey in the international subsample allow a formulation of more general conclusions (Figure 2):

1. A slight majority of the respondents (50%) claim that they conduct their research projects on tourism within various paradigms of the “traditional” scientific disciplines. At the same time as much as 45% express the opinion that they rely on the specific paradigms which belonged to the studies of tourism.
2. A significant majority of the respondents (59%) consider themselves representatives of the Studies of Tourism, while 33% of the respondents prefer to call themselves representatives of traditional disciplines. It is worth noticing that the percentage of those ready to call themselves representatives of the Studies of Tourism is bigger than the percentage of those who are ready to acknowledge the existence of specific paradigms of the studies of tourism.
3. Finally, an apparent majority of the respondents (53%) is ready to formally recognise the Studies of Tourism as an autonomous scientific discipline (please note that in certain countries the Studies of Tourism have already enjoyed the status of an autonomous scientific discipline); 36% hold the opposing view.
4. The analysis suggests that international respondents as the whole seem to be rather consistent in their opinions about the scientific identity of tourism research – all the general indices are on a similar level. In particular cases, however, their opinions are quite surprising (e.g. the lack of consistency among Full Professors in their readiness to call themselves representatives of the Studies of Tourism and their apparent reserve in recognising the Studies of Tourism as an autonomous discipline).

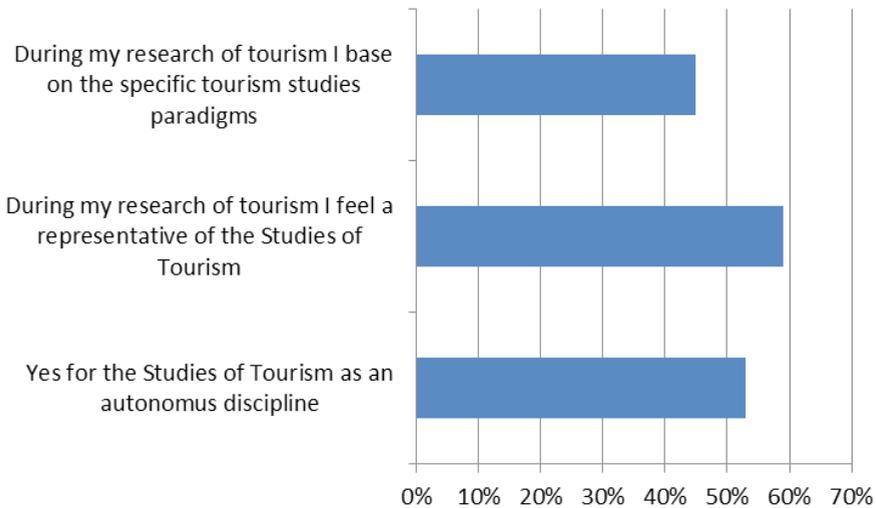


Fig. 2. The scientific identity of tourism research according to international respondents  
Source: personal findings.

### Conclusions – Polish versus international views on the scientific identity of tourism research

As it was mentioned at the beginning of this paper, its aim is to find and reveal similarities and differences occurring among Polish and international scholars in terms of their views on the scientific identity of tourism research. The results of an appropriate comparative study is presented below.<sup>98</sup> They are divided into two groups: the differences and the similarities.

The differences in the opinions presented by Polish and international scholars on the scientific identity of tourism research can be identified on a general level, but they can also be broken down to particular aspects of the issue. Generally, the results of the survey suggest that international scholars are much more eager to recognise certain specificity of tourism research than their Polish colleagues. It is especially apparent in the comparison of the recognition of tour-

<sup>98</sup> The study was of qualitative character and its results cannot be directly generalised. They include opinions presented by scholars who participated in the survey.

ism studies paradigms and in the comparison of the identity of the scholars as representatives of traditional disciplines or the Studies of Tourism. It should be noted that the differences in these opinions are significant (Figure 3). On more detailed levels of analysis, many particular differences in the opinions expressed by Polish and international scholars have been identified. The most significant ones concern the following aspects: 1) only 24% of Polish respondents vs. 45% of the international respondents declare that they used specific paradigms of the studies of tourism; 2) 41% of Polish informants vs. 59% of the international informants consider themselves representatives of the Studies of Tourism; 3) Polish researchers are much more consistent than their counterparts in their allegiance to traditional scientific paradigms (in the cross-section of all the academic degrees); 4) international scholars are much more eager to consider themselves representatives of the Studies of Tourism than their Polish colleagues (in all disciplines and degrees).

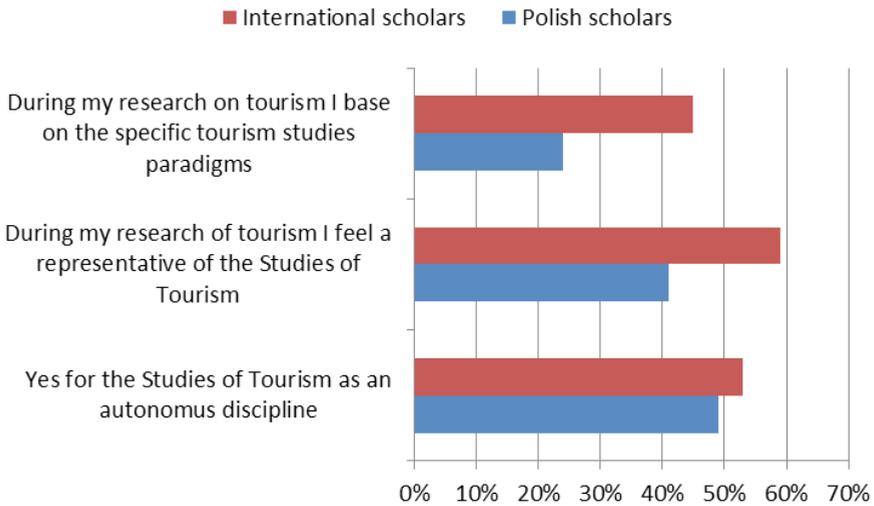


Fig. 3. Polish and international respondents' opinions on the scientific identity of tourism research

Source: personal findings.

On the other hand, there clearly are certain similarities in the views of Polish and international researchers. They are revealed in detailed analyses of the internal structure of particular responses and some dependencies occur-

ring between them in certain categories. The most evident examples include the following cases: 1) the consistent opinions of Polish and international scholars suggesting that the bigger the theoretical output of a given discipline, the bigger the attachment of the scholars to its paradigms; 2) in both groups of respondents, Full Professors (among other degrees holders) are relatively the most eager to recognise a new paradigm of the studies of tourism and to call themselves representatives of the Studies of Tourism; 3) the structure of responses concerning the recognition of the autonomy of the Studies of Tourism by scientific degree is similar in the Polish and the international sample; 4) the same can be said about the responses giving grounds to the statements about the relationships occurring between the views on the autonomy of the Studies of Tourism, the age of researchers and the length of their experience in researching tourism. Apart from these findings, a more general conclusion seems worth stressing: in both subsamples similar groups of proponents and opponents of tourism as a separate discipline have been identified (Figure 4).

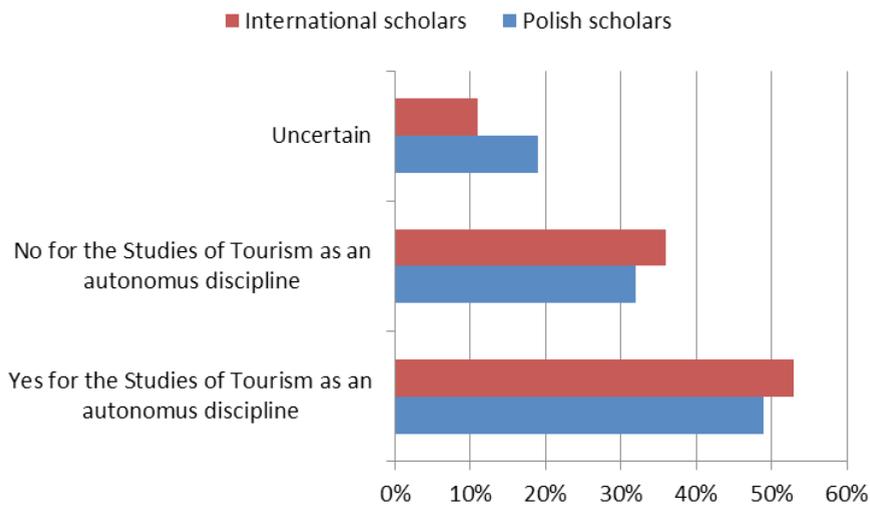


Fig. 4. Proponents and opponents of tourism as a separate disciplines among Polish and international scholars

Source: personal findings.

Taking into account the above-mentioned findings and the conclusions from the survey carried out among the scholars of tourism of different schools and traditions, it is quite evident that Polish scholars of tourism hold a much more conservative position than their international colleagues as far as the recognition of the independent scientific identity of research of tourism is concerned. On the other hand, it should be noted that on a general level certain tendencies are shared by Polish and international scholars. These tendencies concern mainly the necessity of building certain methodological bases (understood as paradigms) on which research on tourism should be subsequently founded.

## **Summary**

To sum up the particular observations and the results of the analysis, it could be stated that it is very difficult to precisely define the cognitive status of the contemporary studies of tourism. Undoubtedly, they are methodologically rooted in the “older” scientific disciplines which traditionally deal with the phenomena associated with tourism. Tourism scholars still use their methodological outputs. Unfortunately, the genuine output that could be credited to Tourism Sciences (understood as a separate discipline) seems to be still rather scarce. Also, academia (as suggested by the discussed results of the presented survey and the experience of the international debate from the 1990s–2000s) is divided and, so far, it has not been able to come up with a common, coherent answer to this question.

It is quite clear that the main part of the argumentation of the opponents of tourism’s own research identity has been based on such methodological premises as the lack of a commonly accepted definition of tourism and tourism’s own theories and methods. Such critics often refer to the classical Kuhn’s model and the notions of scientific paradigm and normal science. There are, however, ways of arguing against this logic. As regards the classical methodological models of the development of sciences, it is worth mentioning that they are suited to the needs of natural sciences rather than social sciences and humanities. If academia was to rely only on these models, other social sciences could have the same problem with the recognition of their identity. And yet nowadays nobody seems to be questioning sociology, cultural anthropology, ethnography or ethnology as academic disciplines (although, in the past, all of them were criticized from the methodological positions of natural

sciences). Moreover, in a wider methodological context, it seems that an attempt to impose on tourism studies so rigid a framework that was built for different purposes is a rather positivist postulate. Paradoxically, the most prominent opponent of such an approach was Kuhn himself (Okasha<sup>99</sup>), who questioned the dominant role of logical positivists and Popper's vision of science. He criticized them for focusing only on the "context of justification" and not paying enough attention to social, historical and cultural circumstances in the process of development of a science ("context of discovery"). In the light of Kuhn and his followers (in particular the representatives of the "strong programme" in non-classical sociology of science) ideas concerning the significance of social environment for the development of a science (Barnes,<sup>100</sup> Barnes & Bloor<sup>101</sup>), a turn towards Leiper's argumentation in favour of tourism's own scientific identity seems justified. This author, strongly advocating the establishment of tourism's scientific identity, bases his opinion on the common social recognition of tourism as a field of activity and study. Additionally, from the practical point of view, academic legitimacy and scientific recognition of tourism could facilitate the funding of its research (Rátz,<sup>102</sup> Hall<sup>103</sup>). The results of the survey and the justifications provided by the respondents in their comments suggest that many members of the academic community share this view.

Some time and space should also be devoted to the discussion of this "ominous" disciplinary tyrannical force which is employed as an argument against the establishment of tourism as a discipline. At first glance it seems convincing, but a closer investigation reveals various doubtful aspects. It may be useful to refer to the example of other social sciences whose object of research is extremely inter-disciplinary and difficult to define. In this regard they are similar to tourism studies and share with them the same methodological weaknesses. Yet, disciplines such as sociology, cultural anthropology, ethnology, ethnography and gender studies have successfully developed their academic identity. Representatives of these disciplines (in majority) were not afraid of this "mythical tyrannical

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<sup>99</sup> S. Okasha, *Philosophy of Science. A Very Short Introduction*, Oxford University Press 2002.

<sup>100</sup> B. Barnes, *Scientific knowledge and sociological theory*, Routledge, Oxon–New York 2009.

<sup>101</sup> B. Barnes, D. Bloor, *Mocny program socjologii wiedzy*, Wydawnictwo IFiS PAN, Warszawa 1993.

<sup>102</sup> T. Rátz, *Crossdisciplinarity...*

<sup>103</sup> M. Hall, *Reflexivity and Tourism Research*, in: *Qualitative Research in Tourism*, eds. J. Phillimore, L. Goodson, Routledge, London 2004, p. 147.

force” that could limit their freedom as researchers. On the contrary, they felt that the emergence of the new disciplines could facilitate their efforts to win an academic recognition in the community of researchers.

Of course, this argumentation does not intend to discredit the inter- and cross-disciplinary approaches in the studies of tourism. They are, and certainly will be, necessary to cope with vast problems that involve tourism issues. On the other hand, it seems rather unquestionable that in order to develop a “post-modern” approach in tourism studies, it is necessary to first build ontological and epistemological foundations that would assure the methodological rigour of tourism research (Rátz<sup>104</sup>). In this context, the form of the disciplinarity framework seems a reasonable proposal. Only then will it be possible to apply the next post-disciplinary stage safely. Otherwise we may end up in “methodological quicksands” and such a situation would surely encourage both the domination of other disciplines over tourism and the epistemological eclecticism of tourism studies.

The above deliberation offers a handful of arguments against the views of the opponents of tourism’s own academic identity (especially understood as a separate discipline). This does not mean, however, that the supporters are absolutely right. It may be useful to analyse the problem from a wider cognitive perspective. In this context, the question whether we will be able to learn more about tourism using only its scientific identity or should we rather base on the outputs of other tourism-related sciences seems to be most reasonable; in other words – will we, by means of the academic identity of tourism, gain better knowledge of tourism. Taking into account so vast field of interest of tourism researchers (even after narrowing it down to Babu’s “Tourism Development Studies” only), the answer still remains unclear. In this context, Hoerner’s *tourismologie* and Jovicic’s tourismology, as multidisciplinary and synthetic tourism sciences, do not appear to be achievable solutions due to their excessive field of study.

Perhaps a more feasible proposal for the tourism academic identity should focus on the search for certain specific – and at the same time constitutive – features that would distinguish tourism research from other academic activities – disciplines, as they would point to the aspects that could not be managed in sat-

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<sup>104</sup> T. Rátz, *Crossdisciplinarity...*

isfactory ways by other sciences (Chojnicki,<sup>105</sup> Maciołek<sup>106</sup>). This would result in the researchers working (at least at the beginning) within a relatively narrow field centred around tourism-specific features. To sum up the whole discussion, it can be said that, from the cognitive perspective, the optimal position would be the one in which research is conducted using various disciplinary approaches and at the same time it focused on tourism-specific aspects. Finally, let us refer to a significant article by Tribe<sup>107</sup> concerning the truth in tourism. The author presents quite a pessimistic view that it is probably impossible to find one truth about tourism. He formulates such an opinion on the basis of social constructionism which sees the world in relative terms. Such a perspective may result from observing various tourism phenomena through the lens of different disciplines. Indeed, it seems that such an attitude can lead at the most to different truths about tourism, as mentioned by Tribe. Perhaps an alternative approach, based on specificity and “constitutivity” of certain aspects of tourism could bring us closer to a more “objective” truth about tourism, i.e. investigated from more critical-realistic positions as discussed by Botterill, Pointing, Hayes-Jonkers, Rodrigues, Jones & Clough,<sup>108</sup> Botterill<sup>109</sup> and Pernecky.<sup>110</sup>

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<sup>105</sup> Z. Chojnicki, *Charakter i sytuacja nauki o turystyce – rozważania metodologiczne*, Zeszyty Naukowe Wyższej Szkoły Gospodarki Bydgoszcz, Turystyka i Rekreacja 3, Bydgoszcz 2005, pp. 11–23.

<sup>106</sup> R. Maciołek, *Osobliwości metodologiczne badań nad turystyką*, Zeszyty Naukowe Wyższej Szkoły Turystyki i Hotelarstwa w Bydgoszczy 2, Bydgoszcz 2002, pp. 17–26.

<sup>107</sup> J. Tribe, *Tribes...*

<sup>108</sup> D. Botterill, S. Pointing, C. Hayes-Jonkers, C. Rodrigues, T. Jones, A. Clough, *Violence, tourism, security and critical realism*, “Annals of Tourism Research” 2013, No. 42, pp. 311–333.

<sup>109</sup> D. Botterill, *Constructionism – A critical realistic reply*, “Annals of Tourism Research” 2014, No. 48, pp. 292–298.

<sup>110</sup> T. Pernacki, *Constructionism, critical pointers for tourism studies*, “Annals of Tourism Research” 2012, No. 39 (2), pp. 1116–137; T. Pernacki, *Realist and constructionist shades of grey*, “Annals of Tourism Research” 2014, No. 48, pp. 295–298.

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## TOŻSAMOŚĆ NAUKOWA W BADANIACH NAD TURYSTYKĄ W OPINIACH POLSKICH I ZAGRANICZNYCH BADACZY

### Streszczenie

Celem artykułu jest przedstawienie wyników badań empirycznych poświęconych tożsamości naukowej polskich i zagranicznych badaczy turystyki. Zostały one zaprezentowane w świetle dorobku angielsko i francuskojęzycznej literatury oraz polskich prac, które ukazały się w ciągu ostatnich kilku dziesięcioleci. Artykuł składa się z trzech zasadniczych części, które zawierają: 1) dyskusję teoretyczną i przegląd wyników wcześniejszych badań dostępnych w wybranych źródłach; 2) prezentację wyników badań empirycznych nad tożsamością naukową polskich i zagranicznych badaczy turystyki; 3) wnioski końcowe o charakterze teoretyczno-metodologicznym dotyczące sytuacji poznawczej i formalnego status badań nad turystyką.

Badania empiryczne, których wyniki przedstawiono w niniejszym artykule mają charakter jakościowy (nie spełniały kryterium reprezentatywności) i zostały przeprowadzone na celowej próbie polskich i zagranicznych badaczy turystyki w 2013 i 2014 roku. Próba zagraniczna liczyła 180 naukowców o zróżnicowanym doświadczeniu, wieku i dorobku naukowym (od stopnia magistra do profesora). Reprezentowali oni publiczne i prywatne uniwersytety, ośrodki badawcze oraz stowarzyszenia zrzeszające badaczy turystyki z blisko 50 krajów, ze wszystkich kontynentów. Grupa polska liczyła 90 badaczy – przedstawicieli różnych dyscyplin naukowych zajmujących się turystyką. Reprezentowali oni najważniejsze krajowe centra akademickie i naukowe prowadzące studia nad tą dziedziną.

Wyniki tych badań pokazują dość jednoznacznie, że Polscy badacze prezentują dużo bardziej zachowawcze stanowisko dotyczące uznania tożsamości naukowej badań nad turystyką (przejawiającej się w uznaniu specyficznych paradygmatów naukowych, poczuciu przynależności do wspólnoty badaczy turystyki oraz w akceptacji nowej dyscypliny naukowej). Jednocześnie zauważono także sporo podobieństw odnoszących się do poszczególnych zagadnień związanych z przedmiotem badań. Z drugiej strony należy podkreślić, że zarówno wśród polskich, jak i zagranicznych naukowców uwidoczniły się znaczne wewnętrzne różnice poglądów na temat tożsamości naukowej badań nad turystyką, zwłaszcza w zakresie ich statusu poznawczego oraz formalnego.

Niniejszy artykuł zawiera rozwinięcie dyskusji prowadzonej we wcześniejszych tekstach autora opartych głównie na badaniach nad tożsamością naukową polskich badaczy turystyki.

**Słowa kluczowe:** tożsamość naukowa w badaniach nad turystyką, poglądy polskich i zagranicznych badaczy turystyki



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## **PREPARING A PRESCHOOL AGE CHILD FOR TOURISM AND LOCAL HISTORY EXPLORATION**

### **Abstract**

In preschool education the process of preparing a child for the future role of a tourist is of great importance. The way attitude towards tourism and the knowledge of local history is shaped in kindergarten, will decide upon intensity and value of adult generations' tourism. The process of initiating tourism-related activity and interest in the surrounding cultural, natural and social reality takes place mainly when children participate in field trips. The article presents excursion's role in shaping a tourist behaviour in child's comprehensive development. The analysis of a survey conducted among teachers and parents has been made in order to assess the respondents' opinions on the conditions and the importance of organizing trips in the development of social, cognitive, emotional and health areas of a child's personality as well as child's commitment and preparation for tourism.

**Keywords:** tourism in kindergarten, field trip as a type of tourism, preschool-aged child

### **Introduction**

Tourism and local history are areas of human life in which one participates because of the need and willingness to explore local and distant environment, the need for rest, relaxation and the need for experiencing emotions, a rapture. An important factor of tourism – local history studied by an adult is to shape the right attitude towards it from an early age. Fostering interest in learning about

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the country of origin and using its recreational resources as early as kindergarten, is the best investment in the development of regional and national tourism. In the process of preparing a child to participate in social life, including involvement in tourism, the regional education importance is emphasized. Teachers, using different organizational forms and working methods in the kindergarten, influence a child to gradually shape the features and attitudes of a future tourist such as: an affection for the surrounding reality, an attachment to native land, a knowledge of local public services and an ability to act appropriately in public, an interest in the region's history and respect for local customs and traditions as well as knowledge of the elements which characterize a given locality. The didactic – educational process regarding the field of regional education in a kindergarten emphasizes the need to shape children's sense of their own identity as a basis for their involvement in the functioning of the environment as well as being open to other communities and cultures.<sup>1</sup>

The aim of this study is to identify the role of preschool education as an important part of preparing a child for the role of a tourist and encouraging their cognitive and emotional interest in local history. The author's intention is also to show the importance of a field trip as a form of introducing preschool children to tourism and a way for their comprehensive development. Another aim is to present the results of the survey concerning teachers' and parents' views on the importance of a field trip in a full development of a child's personality, mainly including their interest in local history.

### **1. Field trip as the best form of tourism and gaining knowledge about local history for the preschool child**

One of the forms of regional education which prepares a child for the future role of a tourist and helps the child to experience the first contact with the forms of local history exploring is a trip. It plays a huge role in the comprehensive development of all areas of a preschooler's personality. During a trip, a teacher gives children an opportunity to gain experience, knowledge, habits, skills related to tourism and inspires them to be active, to interact with the environment. A field

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<sup>1</sup> A. Budniak, *Social – environmental education of preschool and primary school aged children*, IMPULS, Kraków 2010, p. 123.

trip is the most interesting and proper form of introducing nature to preschoolers, discovering its secrets and creating an emotional connection with it.

Children's participation in excursions, which are the main form of tourism, effects:

- knowledge of a local environment and a child's place of residence,
- harmonious psychophysical development,
- strengthening the habit of spending time outdoors regardless of the time of year, even on rainy days, building up resistance to weather changes and difficulties of being outdoors,
- solidifying interests in different forms of physical activity possible to practice in the field,
- satisfying the hunger for adventure and experience, enriching child's personality,
- being awarded with the „Seven-league boots”<sup>2</sup> badge (The program is implemented in cooperation with PTTK. It is designed for children under the age of 10. The main objective of the program is to get the silver and gold “Seven-league boots” “Hiking Tourism Badge by encouraging parents to hike and explore a local environment along with children, gradually bond with nature, raise awareness concerning nature – fauna and flora).

Preschool children participate in such forms of tourism as: auto-tourism, vacation, foreign tourism, holiday trips. But a field trip is the most popular method fulfilling the leisure and cognitive functions, and shaping social attitudes of a preschooler.<sup>3</sup> In general, a kindergarten organizes several shorter and longer field trips. The longer ones, lasting all day, have a tourism – local history studying character. Due to children's age, they require a very precise and conscientious preparation, food organization, places to rest, caring adults, safe transport. M. Studzińska<sup>4</sup> stresses that walks and excursions are a desirable, but a difficult form of working with children. They require a specific preparation, taking into account:

- children's physical abilities associated with reaching the desired location,
- knowledge of the area,

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<sup>2</sup> T. Łobożewicz, *Sightseeing and tourism at school*, WSiP, Warszawa 1985, pp. 30–31.

<sup>3</sup> *Ibidem*, p. 30.

<sup>4</sup> M. Studzińska, *Pre-school children learn about nature*, WSiP, Warszawa 1989, p. 103.

- purpose and subject of either the walk or excursion,
- knowledge of objects which children will observe.

Trips organized for preschoolers, especially the older ones, are a source of great excitement and joy. Children's need to express the feelings and experiences during trips translates into the language of art, symbols, gestures, facial expressions, etc. Well organized excursion is an opportunity to gain knowledge about the surrounding nature and how it changes during the year. It is especially valuable that children can experience direct contact with reality and can observe natural objects and multilateral conditioned processes and phenomena. The participation in field trips shapes an ability to observe nature, is conducive to deepening and developing interests, raises sensitivity to the beauty of nature and the desire to take care of the environment, teaches acquiring knowledge through direct contact with nature.<sup>5</sup> In the same way preschool children explore the social, cultural, historical reality developing cognitive curiosity, expressed in the quest to discover the peculiarities of the phenomena, dependencies and regularities.<sup>6</sup>

## 2. Own research objectives

Due to the excursion having such a large impact on shaping the personality of a young child, it has been made the subject of a multi-stage research.<sup>7</sup> The first part, presented in this study, is to recognize the opinions of kindergarten teachers and parents on the role of trips in the development of a preschool age child and in preparing them for the role of a tourist. At this stage, the answers to the following questions are sought: how the teachers choose a destination, what factors determine their decision? What attitude do children and teachers have towards organizing and participating in excursions? To what extent participating in trips shapes cognitive curiosity and interests of preschoolers? To what extent children's participation in trips improves their health and physical fitness and shapes patriotic and socio - moral attitudes? What measures do parents take to shape positive attitudes towards tourism and studying local history among the family?

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<sup>5</sup> A. Budniak, *Social – environmental education...*, pp. 88–89.

<sup>6</sup> K. Denek, *Trips in the modern school*, ERUDITUS, Poznań 1997, p. 39.

<sup>7</sup> K. Wojciechowska, *Excursion as a basic form of tourism and sightseeing in the preschool aged child's education*, Rozprawy Naukowe AWF we Wrocławiu No. 46, Wrocław, pp. 212–218.

The concept of the research is based on the method of the diagnostic survey. The questionnaire for teachers and parents has been employed. The sample includes 30 teachers and 120 parents. There are also interviews conducted among 50 preschoolers in accordance with the questionnaire. Qualitative data analysis have provided answers to the questions as above.

### **3. Opinions of teachers and parents on the value of field trips**

The value of a fieldtrip in regard to acquiring knowledge and shaping attitudes is to a large extent determined by adapting its destination. Therefore, teachers must take into account different circumstances when making the final decision. Certainly, children's interests and curriculum requirements serve as guidelines. Organizational and financial capabilities of kindergarten and parents have a considerable impact on choosing travel destinations. Planning trips should be accompanied by a full understanding of the goals that the teacher intends to achieve. They are different for each excursion. This is due to the child's needs and the trip's role, whether it is supposed to be a source of acquiring new knowledge, a discovery of a previously unknown to a child piece of reality, or to serve as a repetition, collection, deepening, consolidation of the previously known concepts.<sup>8</sup>

When choosing a social and natural environment, which is to be the travel destination, its didactic-educational values should also be taken into account. According to the respondents, the trips are most often taken to locations where children can directly observe nature, that is: forest, meadow, park, river, zoo, botanical garden and – as mentioned by a few scholars – horse stable. Other venues include: planetarium, museum, library, cinema. Unfortunately, trips designed to familiarize children with various workplaces and occupations (shop, pharmacy, health center, a shoemaker etc.) are organized less frequently. Therefore, children lose the opportunity to get to know the specifics of the work, the respect for it, how it is organized, interesting facts about it which thus results in lowering the level of their occupational pre-orientation. Teachers, asked about the factors of choosing travel destination, stated that they mainly follow the curriculum requirements, children's interests and parents' expectations.

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<sup>8</sup> K. Denek, *Trips...*, p. 49.

Children's interest in trips is enormous. They themselves declare it during the interviews, and the teachers confirm it. Asked about pupils' stance towards participating in field trips, teachers' survey responses all indicated a very positive, enthusiastic attitudes of children. Interestingly, the teachers claim that the kind or location of a trip makes no difference to the children. The mere fact that children get to spend longer time together outside the walls of the kindergarten, brings them joy and makes them anticipate it. According to the teachers, children's joy can sometimes be so great that at first it is difficult to control their emotions during a trip. In the interviews, children enthusiastically talked about excursions, in which they participated and they all agreed that "the trip days" are their favorite days in kindergarten. They gave arguments to support it including: a coach journey, al fresco dining, participating in games, getting to know the unknown, exploring interesting places, watching a variety of animals and plants previously seen only in pictures, horse riding, carriage rides, travelling by boat. They primarily listed those activities which they do not experience in other circumstances. The children talked about the feelings they experience during excursions and they passionately stressed that they would like to travel outside their place of residence more often.

The vast majority of teachers organizes trips for children willingly. They believe that despite the lengthy preparation or bearing a huge responsibility for children, it is an essential form in the didactic-educational process. Teachers give credit to the excursion for not only its cognitive values, but also for how it shapes attitudes towards nature, patriotism, valuable traits and the abilities to work in a team, and it is a rich source of aesthetic experiences. Teachers also stress the recreational importance of field trips which offer the possibility of leisure and spending free time for the benefit of physical and mental health.

Teachers' opinions regarding child's cognitive curiosity development by participating in excursions, were consensual and attributed a great importance to this form of learning. A possibility to explore various objects and phenomena occurring in the natural environment and in the real size is especially valuable. "A child will discover nature, if the mysteries of nature which entice him, make him hungry for knowledge, won't be spoiled by us".<sup>9</sup> Children, instead of listening to descriptions of nature and watching pictures, can explore nature themselves

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<sup>9</sup> M. Sawicki, *Environmental education in I-III year of primary school*, Semper, Warszawa 1997, p. 35.

through actions and sensory experiences. The multisensory experience of direct communing with nature through sight, hearing, touch, taste is the basis of conceptualizing the environment. During action and sensory experience a child accumulates experiences which are used to correct and modify the concepts forming the basis of understanding the world. A picture of the surroundings, which children build is becoming richer, more diverse and more compatible with reality. The knowledge and experience children have gained must be properly processed to be lasting. Through such forms of processing as a story, poem, drawing, singing, theater, and most of all fun, a repertoire of experience a child gained gives him or her the knowledge and understanding and the basis of a scientific view of the world.<sup>10</sup>

Gaining knowledge through trips gives many opportunities to develop cognitive curiosity, a variety of interests and passions. Activities related with the field of study in global history and tourism taken during trips are among the best ways of pictorial familiarizing children with the surrounding reality. An important fact is that this method promotes an effective way of combating verbiage and formalism in school education.<sup>11</sup> It is acknowledged by the teachers since 90% of the respondents claim that the children have a very strong interest in new phenomena discovered by observing nature and being a stimulus for an independent exploration. Children ask more questions, browse illustrated books about nature more attentively, talk about their observations during walks and trips with parents, talk to each other about unusual places, animals, plants they have seen. Therefore, participating in a trip can make seemingly familiar phenomena reveal other, more interesting sides, show mutual interdependencies and be a source of developing interests, willingness to deepening knowledge and experiencing interesting sensations through contact with nature. The main role of excursions is: providing its participants with a form of active rest, strengthening their immune system and physical, and mental fitness.<sup>12</sup> The study has sought to investigate what the teachers' stances towards a trip as a form conducive to caring for health and physical fitness are. It has been established that a slight majority, 61% of teachers surveyed, believe that a field trip contributes to

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<sup>10</sup> B. Dymara, S. Michałowski, L. Wollman-Mazurkiewicz, *A child in the natural world*, IMPULS, Kraków 1998, p. 192.

<sup>11</sup> K. Denek, *Trips...*, p. 51.

<sup>12</sup> *Ibidem*, p. 61.

the development of children's physical fitness. Teachers emphasized that thanks to children taking part in trips they shape a habit of spending time actively, which is an essential component of a healthy lifestyle. In particular, trips involving walking, hiking promote improving disease resistance and stamina. During exercise, heart and lung function increases, along with metabolism, resulting in increased appetite. Therefore, children are happy, their need for movement is satisfied and they willingly eat meals brought from the kindergarten. Despite this, 36% of respondents claim that children's participation in excursions contributes little to enhance their health and physical development, and 1% of respondents deny the value of a trip as a way of proper functioning of the organism and staying fit.

During the trips organized for kindergarten children there are numerous situations which promote the development of socio-moral and patriotic attitudes. Participation in a field trip is a joyful experience for children as it is associated with contact with nature, communing with peers, exploring local and distant places. It is an opportunity to admire the beauty of the country of origin and developing an attachment to it. Excursions taking place in natural conditions create an opportunity for teachers to observe children's behavior and to modify it in case of a lack of discipline, inadequate attitude towards the peers, wildlife or national mementos. Teachers cannot let children litter the place of having fun, recreation or a meal. They pay attention to a correct behavior in a forest, meadow, by a river, so as not to break branches, uproot plants, fright the animals. It is necessary to develop a respect for the work of human mind and hands and protect the natural environment from destruction.<sup>13</sup> K. Denek also lists a number of socio-moral educational goals implemented on trips. These include, among others: teaching children to comply with the rules of social coexistence, developing valuable traits and a will, acting with self-discipline and self-control, solidarity, justice, patriotic attitudes, preparing for a role of a team member, teaching a respect for national traditions.<sup>14</sup>

70% of teachers surveyed states that a field trip promotes shaping socio-moral and patriotic attitudes with emphasis on attitudes towards nature and the products generated by human activities. Patriotic attitudes are formed during direct contact with the social environment and through progressive exploration of the nearest and more distant environment. It is important to involve

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<sup>13</sup> Ibidem, p. 56.

<sup>14</sup> Ibidem, p. 57.

preschoolers in preparation, active participation and summarizing the results of trips. It is significant in developing the positive character traits such as responsibility, perseverance, dutifulness, determination, assertiveness, an ability to complete tasks, both independence and an ability to work in a team, and a polite behavior. 16% of teachers has an opposite view, claiming that a trip is rarely an opportunity to shape socio-moral and patriotic attitudes. The remaining number of the respondents believes that children shape these attitudes only when that is the specific theme and objective of a trip.

A child acquires knowledge and abilities to take care of his or her health at home by accumulating experiences and an individually adapted education. A child should participate in various forms of physical activity along with other family members. For children, physical activity includes: dance, work, recreation, tourism, entertainment, etc. C. Lewicki<sup>15</sup> distinguishes the most recommended forms of health education in a family which promote creating experiences beneficial health wise, including:

- trips outside the house,
- weekend field trips,
- holiday field trips programs,
- health training,
- outdoor recreation (sport),
- forms of outdoor rehabilitation and therapy.

Among them, forms associated with a longer or a shorter trip, meaning forms of tourism –local history exploring come to the fore. A sample consisting of 120 parents amongst three kindergartens in Bydgoszcz was selected for the study. The researcher was interested in the actions taken by parents in order to create positive attitudes towards tourism and local history exploration. 96% of parents declare concern for satisfying child's developmental-movement needs. Analyzing the data concerning the types of tourist activity and their frequency provided by the parents, a dissonance between statements and facts can be noticed. Trips outside the city are organized by 31% of respondents a few times a year. Most parents confine themselves to taking a stroll at weekends. 72% of families organize excursions during holidays, but only 27% plan a wider touring programme. Many persons reason that trips meant to explore local history outside the city,

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<sup>15</sup> C. Lewicki, *Factors determining the course, the quality and the effects of health education of 6–11 year old children in the family*, WSP, Rzeszów 2001, p. 119.

require appropriate equipment and also the economic condition of a family imposes certain limitations. Therefore, they most frequently cited stroll as a form of promoting physical activity in children and an opportunity to explore the local environment. A stroll does not require organizing a trip away from home, no special equipment and clothing, can be done at different times of the day, is a form of spending time with family.

## **Conclusion**

One of the main objectives of early childhood education is to develop a proactive approach to the problems of the local environment, to create an emotional bond with the region, to instill the sense of concern for nature conservation and its proper development.<sup>16</sup> This postulate is executed most effectively when preschool aged children participate in field trips.

Teachers and their pupils attach great importance to the trip's role. Children describe trips, as very attractive forms of spending time in the kindergarten, the source of enjoyment and merriment. Teachers perceive excursion as an opportunity for achieving many cognitive objectives, learning opportunities and developing children's cognitive curiosity. Children's direct contact with the environment, which is based on observation, measurement, and other practical activities, makes them see the relationships and dependencies between the elements of the natural and social environment and makes them develop a comprehensive picture of the surrounding reality. This knowledge is based on multisensory sensations and is a source of rich aesthetic experiences. Communing with nature teaches children how to perceive its beauty, creates an emotional bond, which shapes cultural and patriotic attitudes. All respondents also appreciated the recreational role of a trip and how it is an opportunity to improve health and fitness.

Therefore, a field trip should be a more frequently used form of early childhood education, both in the kindergarten and family. Teachers and parents should search for sources of inspiration and learning programs through tourism and local history exploration. Many of such initiatives can be found in literature and on websites. Among others, the project of cooperating networks between

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<sup>16</sup> S. Witek, *Kindergarten field trips*, CDN, Kalisz 1986, p. 4.

The Small Kindergartens.<sup>17</sup> The Small Tourist Kindergartens project aims to develop tourism in selected kindergartens, promote agritourism in the countryside and its surroundings as well as to engage preschool children and their families, along with the personnel of the institutions, in the development of the pro-family tourism offer of the town and the region of Lower Silesia. The Kindergarten No. 13<sup>18</sup> in Elbląg is the only tourist kindergarten in Poland. The institution promotes tourism by integrating kindergarten community. The kindergarten organizes and participates in rallies, tourist and sport events together with parents and all employees of the nursery in cooperation with the PTTK Earth Elbląg. Another initiative is the tourist program of the “Acacia Hill” public kindergarten in Łagiewniki.<sup>19</sup> The basic idea of the program is to encourage children and their parents to spend free time actively, healthily and productively. Children’s main task which engages all their attention is to explore the local and distant environment, its natural elements, traditions, cultural monuments, its history, the myths and legends as well as to win the “Seven-league boots” tourist badge.

These exemplary actions taken by the kindergarten can be a source of inspiration for other institutions in order to disseminate tourism in early childhood education, or at least to encourage more frequent trips, which according to H. Gutowska<sup>20</sup> are like opening “a window on the world”, they are a preparation for independent expeditions satisfying curiosity and an implementation of the activity connected with exploring local history.

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<sup>17</sup> <https://sites.google.com/site/maleprzedszkolaturystyczne>.

<sup>18</sup> <http://www.info.elblag.pl/17,13492,Przedszkole-ktore-promuje-turystyke-i-zdrowie.html#ixzz3440YqoRw>.

<sup>19</sup> <http://www.przedszkole.lagiewniki.pl/program%20turystyczny.htm>.

<sup>20</sup> H. Gutowska, *Social and natural environment in I–III grades. The practicum handbook*, WSiP, Warszawa 1989, p. 173.

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## PRZYGOTOWANIE DZIECKA W WIEKU PRZEDSZKOLNYM DO TURYSTYKI I KRAJOZNAWSTWA

### Streszczenie

W edukacji przedszkolnej procesowi przygotowania dziecka do przyszłej roli turysty przypisuje się duże znaczenie. To, w jaki sposób już w przedszkolu zostanie ukształtowana postawa wobec turystyki i krajoznawstwa, będzie decydować o intensywności i wartości ruchu turystycznego dorosłych pokoleń. Proces wyzwalania aktywności turystycznej i zainteresowania otaczającą rzeczywistością kulturową, przyrodniczą, społeczną odbywa się głównie przez udział dzieci w wycieczkach. W artykule przedstawiono rolę wycieczki w kształtowaniu postawy krajoznawczej oraz we wszechstronnym rozwoju dziecka. Dokonano też analizy wyników badania sondażowego nauczycieli i rodziców, którego celem było poznanie opinii respondentów na temat warunków organizowania i znaczenia wycieczki w rozwoju społecznych, poznawczych, emocjonalnych i zdrowotnych obszarów osobowości dziecka oraz jego zaangażowania i przygotowania do aktywności turystycznej.

**Słowa kluczowe:** turystyka w przedszkolu, wycieczka jako forma turystyki, dziecko w wieku przedszkolnym

## **FUNCTIONING OF TOURISM MARKET**



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**THE COLLECTION OF BETTERMENT LEVIES  
IN RELATION TO THE DIVISION OF REAL ESTATE  
IN THE RURAL COMMUNE OF ZIELONA GÓRA**

**Abstract**

The aim of the article is to showcase the practical aspects of collecting betterment levies related to an increase in the value of real estate due to its division. As a statutory deduction, the betterment levy contributes to the budget of its respective municipality. The reason it is collected has to do with an increase in the value of property that is financially beneficial for the owner or perpetual lessee who has paid their annual fees for the entire lease period or is exempt from it. In order to achieve the goal of the study, the authors performed a characterisation of proceedings related to establishing the levy in the rural municipality of Zielona Góra in the years 2009–2012. During the analysed period 266 decisions were issued regarding the determining of betterment levies. In 2009 this number surmounted to 109 decisions, but decreased yearly to finally reach only 39 decisions in 2012. The increase in the value of the real estate formulated in the property valuation for the purpose of calculating the levy was decreasing each year from circa 8% in 2009 to circa 2% in 2012.

**Keywords:** betterment levy, division of property, Zielona Góra

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## Introduction

The initiation of proceedings related to calculating the betterment levy in relation to the division of real estate is executed in accordance with the Act on Real Estate Economy of August 21, 1997 (consolidated text, 2014 Journal of Laws, Item 518 as amended).<sup>1</sup> According to Article 4, Item 11 of this act, the betterment levy is to be defined as a fee determined in relation to an increase in the value of real estate resulting from the construction of technical infrastructure facilities with the use of funds from the State Treasury, local government units, or the European Union budget or foreign sources which cannot be returned, or else, a fee determined in relation to the consolidation and division of real estate as well as the division of real estate.

The betterment levy is thus determined in three situations which result in an increase in the value of the property caused by:

- the construction of technical infrastructure facilities with the use of public funds (article 144),
- the consolidation and division of real estate (article 107),
- the division of real estate (article 98a).

The betterment levy is one of the groups of real estate fees apart from perpetual usufruct fees and permanent administration fees. It significantly differs from those types of fees in the manner it is established and, most importantly, the motivation behind its collection.<sup>2</sup> The betterment levy is a public levy and depends on specific actions which result in the increase of the value of real estate, yet it is not obligatory for the municipality to determine it (apart from the fee in rela-

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<sup>1</sup> Act on Real Estate Economy of August 21, 1997 (consolidated text, 2014 Journal of Laws, Item 518 as amended).

<sup>2</sup> S. Żróbek, R. Żróbek, R.J. Kuryj, *Gospodarka nieruchomościami z komentarzem do wybranych procedur (Real estate economy with a commentary for selected procedures)*, Wydawnictwo GALL, Katowice 2006; S. Żróbek, *Gospodarka nieruchomościami (Real estate economy)*, Wydawnictwo GALL, Katowice 2006; M. Heldak, A. Stacherzak, *Oplaty adiacenckie z tytułu podziału nieruchomości na terenie miasta Wrocławia (Betterment levies in relation to real estate division in the area of the city of Wrocław)*, „Studies and Materials of the Real Estate Scientific Society” Vol. 16, No. 1 (“Real Estate Management”), Olsztyn 2011, pp. 19–28; J. Cymerman, *System opłat od nieruchomości. Aspekty teoretyczne i prawne (The real estate fee system. Theoretical and legal aspects)*, Wydawnictwo Educaterra, Olsztyn 2009.

tion to the consolidation and division of real estate).<sup>3</sup> In the decision of October 9, 2000 (OPK 8/00) the Supreme Administrative Court of Poland established that “the principle of an equal and just incurring of this type of deduction on subjects is an argument for accepting the principle that the obligation to cover the fee should be incurred to an equal degree by all the beneficiaries of a given occurrence.” The betterment levy first appeared in the Polish legal system in 1961, by virtue of the Act on Terrain Management in Cities and Settlements of July 14, 1961 (1969 Journal of Laws, No. 22, Item 159 as amended).<sup>4</sup> Article 28, Item 1 of this act provided that “natural and legal persons who are the owners of land located within the administrative borders of cities and settlements are obligated to cover the cost of the initial arrangement of streets and parking lots and part of the costs of other communal facilities (water supply, sewage systems, gas and electricity supply) matching the increase in the value of their real estate resulting from the construction of these facilities.

The following Act on Terrain Management and Real Estate Expropriation of April 29, 1985 (1985 Journal of Laws, No. 22, Item 99 as amended) derogated the previous regulations<sup>5</sup> and upheld fees related to an increase in the value of real estate due to the construction of technical infrastructure facilities. Five years later the Act altering the former Act on Terrain Management and Real Estate Expropriation (1990 Journal of Laws, No. 79, Item 464 as amended) extended its scope by charging people who received delineated construction plots for concentrated single-family developments as a result of real estate consolidation and division with the betterment levy related to it.<sup>6</sup> The betterment levy in relation to the division of real estate was introduced last and is the subject of study in this article.

There are many doubts related to this last type of fee. The collection of the two first fees is justified as it is easy to point out the input of the municipality or other administrative units in the improvement of existing conditions which leads to

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<sup>3</sup> J. Bogusławska-Klejment, R. Cymerman, *Oplaty adiacenckie w orzecznictwie i praktyce (Betterment levies in judicial decisions and practice)*, EDUCATERRA, Olsztyn 2010; R. Cymerman, C. Kowalczyk, T. Telega, *Oplaty adiacenckie (Betterment levies)*, EDUCATERRA, Olsztyn.

<sup>4</sup> Act on Terrain Management in Cities and Settlements of July 14, 1961, (1969 Journal of Laws, No. 22, Item 159 as amended).

<sup>5</sup> Act on Terrain Management and Real Estate Expropriation of April 29, 1985 (1985 Journal of Laws, No. 22, Item 99 as amended).

<sup>6</sup> Act altering the Act on Terrain Management and Real Estate Expropriation (1990 Journal of Laws, No. 79, Item 464 as amended).

an increase in the value of real estate. As for the betterment levy in relation to the division of real estate, the cost of the proceedings related to the division is covered in full by the owner or perpetual lessee of the real estate. Despite this, the municipality has the right to determine this type of betterment levy.

The aim of this article is to showcase the practical aspects of collecting betterment levies related to an increase in the value of real estate due to its division, in the area of the rural municipality of Zielona Góra.

## **1. Research methodology**

The study involves an analysis of proceedings related to determining the betterment levy in relation to the division of real estate used to evaluate the location of the real estate taking into account the number of decisions as well as determine the minimal, maximum and average size of the betterment levy depending on its purpose in the local plan. The research also involves an analysis of property valuations formulated by property valuers, as proof in the proceedings related to determining the betterment levy in relation to the division of real estate within the range of a specified value. The study is based on an evaluation of the average increase in the value of the real estate after the division, depending on its area and number of delineated plots, and serves to describe the manner in which the value of 1m<sup>2</sup> of divided real estate is established in each section. The rural municipality of Zielona Góra encompassing 17 villages is the area of study.

Two main methods are used in the research related to the collection of betterment levies in relation to an increase in the value of real estate resulting from its division: statistical description and comparative analysis.

The statistical description method has been used to gather and sort data retrieved from the Land Management Department in the Council Office in Zielona Góra. This has been achieved through the use of the tables presenting the data retrieved from the decisions regarding determining the betterment levy in relation to real estate division, as well as the data from property valuations established in the course of related proceedings. Another technique used in this study involves a graphical description in the form of choropleth maps allowing for an easy to read representation of data. The comparative analysis method has been used to compare sets of information related to the real estate as included in tables and represented graphically. The Microsoft Excel 2010 programme has been used

for this article to calculate all results in the form of tables, diagrams and choropleth maps. The choropleth maps have been created using the MicroStation v. 8 programme.

## **2. General principles of collecting the betterment levy in relation to real estate division.**

The betterment levy in relation to real estate division is closely related to divisions regulated through acts on real estate economy. The provisions of Article 92 of the Act on Real Estate Economy provides that, as per this act, division exclusively comprises the lands and buildings not reserved in the local spatial development plan for agricultural or forest-related functions or those not used for these functions if no local plan exists. The division of a retail real estate as a separate type of property is regulated through the Act on the Ownership of Premises of June 24, 1994 (2000 Journal of Laws, No. 80, Item 903 as amended).<sup>7</sup> With this in mind, one should assume that the betterment levy in relation to real estate division thus refers both to the land that is not used in agriculture, and to buildings. The obligation to pay the betterment levy does not involve the division of retail real estate.<sup>8</sup>

The value of property before and after the division is established according to prices for the day on which the decision to determine the betterment levy is issued. The status of the property before the division is established for the day on which the decision confirming the division of property is issued, while its status after the division is established for the day in which the decision confirming the division became final or the division decision became legally binding, with no component parts being taken into account. In accordance with the regulations regarding real estate economy, the betterment levy may be determined if a resolution by the County Office determining the size of the percentage rate of the levy was in force on the day in which the decision approving the division of the real estate became final or the division decision became legally binding. The percentage rate from that day is used for the purpose of calculating the levy.

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<sup>7</sup> A. Lorek, *Oplata adiacencka i renta planistyczna (The betterment levy and the re-zoning fee)*, PRESSCOM, Wrocław 2010, pp. 24–25.

<sup>8</sup> *Ibidem*.

The component parts of the real estate are not taken into account when determining betterment levies. The Resolution by the Council of Ministers of September 21, 2004 regarding the appraisal of real estate and the formulation of property valuations (Journal of Laws No. 207, Item 2109)<sup>9</sup> determines the status of real estate which is to be established in the process of appraisal. The status from before the division is established on the day on which the decision approving the division of real estate is issued, while the status from after the division is established on the day on which the decision approving the real estate division became final.<sup>10</sup>

In a situation in which the division of property involves the delineation of land plots for public roads or towards widening existing public roads, the area of the property is reduced in size by the area of the plots used for new roads or for broadening the existing ones when estimating the value of the property both before and after the division. Additionally, when settling the betterment levy or arrears related to division one can transfer the rights to the plot delineated as a result of the division to the municipality, with its approval. The difference between the value of the land plot delineated as a result of the division and the amount due related to the betterment levy are covered in the form of surcharges. Therefore the betterment levy can serve as a counterbalance for the payment of claims by municipalities related to the expropriation of plots for public roads pursuant to Article 98 of the Act on Real Estate Economy.<sup>11</sup>

### **3. Collection of betterment levies in the rural municipality of Zielona Góra. Legal basis**

The municipality of Zielona Góra has been involved in the process of collecting the betterment levy in relation to real estate division since the year 2000. The municipality is currently merged with the city of Zielona Góra following a referendum conducted on May 18, 2014 regarding the merging of the Zielona

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<sup>9</sup> The Ordinance of the Council of Ministers of September 21, 2004, on the Appraisal of Real Estate and the Formulation of a Property Valuation (Journal Of Laws, No. 207, Item 2109).

<sup>10</sup> R. Cymerman, C. Kowalczyk, T. Telega, *Oplaty adiacenckie (Betterment levies)*, EDUCATERRA, Olsztyn 2008; M. Heldak, A. Stacherzak, *Oplaty adiacenckie...*, pp. 19–28.

<sup>11</sup> R. Malina, M. Kowalczyk, *Geodezja katastralna. Procedury geodezyjne i prawne. Przykłady operatów (Cadastral geodesy. Geodesic and legal procedures)*, GALL, Katowice 2009; M. Heldak, A. Stacherzak, *Oplaty adiacenckie...*

Góra municipality with the city of Zielona Góra. 17 villages participated in the referendum, with over 15 000 people entitled to vote and over 55% participants. Through a minor majority of votes (53.5% to 46.5% of votes) the local residents expressed their will to merge the municipality with the city. Near the end of July, i.e. on July 29, 2014, the Council of Ministers approved a project of an Ordinance of the Council of Ministers regarding establishing the borders of the Zielona Góra County, which resulted in the city (58 km<sup>2</sup>) growing from 119,000 to 140,000 inhabitants, and experiencing a fourfold increase in its area to 278 km<sup>2</sup>. The collection of betterment levies in the rural municipality of Zielona Góra in the analysed period of 2009–2012 was executed on the basis of the Resolution No. 12/105/2007 by the County Office of Zielona Góra of October 31, 2007, altering the act in the area of determining the percentage rate of the betterment levy in relation to an increase in the value of real estate resulting from its division.

The legal document in force prior to the betterment levy was the Resolution No. 6/65/2007 by the County Office of Zielona Góra of March 30, 2007 regarding the determining of the percentage fee for the betterment levy in relation to an increase in the value of real estate resulting from its division, with the percentage rate equaling 40% of the difference between the value from before and after the division of the real estate. The resolution was altered due to a change in the legal regulations determining the maximum amount of the percentage rate for the betterment levy in relation to division, which currently cannot exceed 30%. The percentage rate of 40% of the difference in the value of real estate was decreased to 30% in accordance with the law. This percentage rate was in force until the end of 2014.

#### **4. Number of conducted proceedings**

An analysis of the number of administrative decisions regarding betterment levies shows a relatively high number of proceedings conducted regarding the calculation of the betterment levy in the area of the rural municipality of Zielona Góra. 266 decisions on determining the betterment levy have been issued in the analysed period of 2009–2012. In 2009 their number was 109 but decreased with each year only to reach as few as 39 decisions in 2012. In 2009 as many as 109 administrative decisions regarding the determining of betterment levies in relation to division were issued, the majority of them for the section

of Przylep, Racula and Ochla (over 12 decisions). No decisions have been issued in the sections such as Jany, Jarogniewice and Sucha on that year. 2010 saw a significant decrease in the number of issued decisions. There were only 59 decisions issued that year, half as few as in the previous year. Although the number of decisions decreased twice, the highest number of decisions was still issued for Przylep (8), Racula (7), Ochla (10) with the addition of Nowy Kisielin with 9 decisions.

The number of decisions between 2010–2011 was similar, with a different distribution in the sections. For example, in Jarogniewice and Jany 1–2 decisions were issued in 2010, while in 2011 no decisions were issued whatsoever. The situation of sections located in the second range in 2010 (3 to 6 decisions) also changed. Mostly, they descended into the third or fourth group, with no decisions; Stary Kisielin was the sole section where the number of issued decisions increased from 3 in 2010 to 9 in 2011. Locations which remained in their groups include Jeleniów an Kiełpin (0 decisions), Sucha (1–2 decisions), Krępa (3–6 decisions) as well as Ochla and Racula which still remain in the group with the largest number of issued decisions (7–10). In 2011 no decision was issued in as many as 6 sections out of 17. In the final year, just as in 2010, the number of decisions dropped twice in relation to the previous year. There was no instance of more than 5 decisions being issued in the studied period. The situation would change significantly if all the decisions were taken into account, but the analysis was limited exclusively to those involving an actual increase in the value of the property. That is why it is justified to exclude 14 decisions instead of studying all 39 of them as they did not involve an increase in value: none of the subjects involved have been charged with the betterment levy (Figure 1).

The betterment levy can be determined 3 years from the day in which the decision approving the division became final or the division decision became legally binding; a reason why the highest number of the issued decisions regarding the betterment levy in relation to an increase in the value of real estate as a result of real estate division was noted in 2009. This was a result of the real estate divisions performed near the end of the year 2007 as well as in the early 2008.<sup>12</sup> The number of divided real estate as well as the number of decisions issued regarding the betterment levy in relation to real estate division decreased

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<sup>12</sup> A conclusion drawn on the basis of documents (division decisions) made available by the municipality of Zielona Góra.

proportionally to the situation on the market. Division decisions mostly involved areas reserved for single-family housing developments. Despite many other terrain functions represented in the former rural municipality of Zielona Góra, including tourist services, there was no instance of a levy determined for tourist areas.



Fig. 1. Location and number of the issued final decisions related to the determining of the betterment levy in the municipality of Zielona Góra between 2009–2012

Source: own elaboration.

## 5. Analysis of the increase in the value of 1m<sup>2</sup> of real estate area resulting from its area after the division

The individual values of 1m<sup>2</sup> of real estate area dedicated for housing purposes after the division have been estimated in the course of the proceedings related to calculating the betterment levy in relation to real estate division. In 2009 and 2010 the minimal value of 1m<sup>2</sup> was 26 PLN. It was less in 2010 and in 2011, equaling 21 PLN/m<sup>2</sup> on average. The maximum value in 2009–2011

approximated 112 PLN/m<sup>2</sup>, and 125.56 PLN/m<sup>2</sup> in 2012. The average value for 1m<sup>2</sup> of real estate in the studied period is 62.50 PLN/m<sup>2</sup>. Table 1 shows the minimal, maximum and average values of 1m<sup>2</sup> of real estate after the division in each section in the municipality.

Table 1

Values of 1 m<sup>2</sup> of real estate after the division reserved for housing purposes in the municipality of Zielona Góra between 2009–2012

The values of 1 m <sup>2</sup> of real estate after the division	Years			
	2009	2010	2011	2012
Minimal (PLN)	25,63	18,54	22,88	26,58
Maximal (PLN)	114,34	114,85	110,63	125,56
Mean (PLN)	69,20	61,85	51,05	67,85

Source: own elaboration.

The authors prepared a representation of minimal and maximal areas of property before the division and the number and minimal and maximum areas of delineated plots (Table 2–3) in order to perform a detailed analysis of the impact of the area of delineated plots on the value of the real estate.

Table 2

Minimal and maximal areas of property before the division in the municipality of Zielona Góra between 2009–2012

Areas of property before the division	Years			
	2009	2010	2011	2012
Minimal (ha)	0,0886	0,0751	0,0694	0,0701
Maximal (ha)	4,1381	8,0675	13,8362	5,4122
Mean (ha)	0,5925	0,7046	1,0080	0,6409

Source: own elaboration.

Table 3

Minimal and maximal areas of delineated plots in the municipality of Zielona Góra between 2009–2012

Areas of property after the division	Years			
	2009	2010	2011	2012
Minimal (ha)	0,0116	0,0159	0,0203	0,0340
Maximal (ha)	0,6963	0,5967	0,8524	0,6879
Mean (ha)	0,1186	0,1235	0,1233	0,1337

Source: own elaboration.

In the studied period the minimum real estate area before its division equaled 760m<sup>2</sup> on the average. The upper limit for the area before the division ranged from over 4.00 ha in 2009 to almost 14.00 ha in 2011. It should be noted that there is a minor number of plots with areas over 2.00 ha subject to division in the analysed period.

The authors have also analysed the influence of the area of delineated plots in the years 2009–2012 on the average increase in the value of 1m<sup>2</sup> of real estate. The results are represented in Table 4. The conducted study shows that the smaller the area of the delineated plot, the greater the individual increase in value. The authors first focused on plots whose areas did not exceed 0.15 ha. In the first three years the average increase in the value of 1m<sup>2</sup> of a plot of this area grew from 11.55% in 2009 to 19.50% in 2011. 2011 saw a significant fall in the increase of value equalling 5.52%. This means it decreased almost four times when compared to the previous year. The second group includes delineated plots whose area fit between 0.15 ha to 0.30 ha. There was a visible fall in the average percentage increase of 1m<sup>2</sup> in the analysed period. The situation is completely different in the last group containing plots with the areas above 0.30 ha. In the latter case there is practically no increase in the individual value of the real estate. In 2009 this increase surmounted to 5%, while in the other years it was close to zero or even less than zero in 2012 thus showing a decrease in the value of 1m<sup>2</sup> of real estate (Table 4).

Table 4

Average increase in the value of 1m<sup>2</sup> of real estate area in the municipality of Zielona Góra depending on the area of delineated plots in the years 2009–2012

Year	Areas of property after the division (ha)	The average increase in the value of 1m <sup>2</sup> (%)
1	2	3
2009	< 0,1500	11,55
2010		14,06
2011		19,42
2012		5,52
2009	0,1500 – 0,3000	7,63
2010		5,06
2011		13,35
2012		1,65

1	2	3
2009	> 0,3000	4,76
2010		0,20
2011		-0,01
2012		-0,70

Source: own elaboration.

The table below (Table 5) contains the average values for the results represented in Table 4 and shows the average increase in individual real estate value for each year without the division to area groups.

Table 5

Average increase in the value of 1m<sup>2</sup> of real estate area in the municipality of Zielona Góra in the years 2009–2012

Years	The average increase in the value of 1m <sup>2</sup> (%)	The number of parcels after the division
2009	7,98	416
2010	6,44	268
2011	10,92	243
2012	2,16	145

Source: own elaboration.

The above table shows the fall in the increase of the market value of 1m<sup>2</sup> of vacant land as a result of real estate division from circa 8% in 2009 to circa 2% in 2012. However, the year 2011 disrupts this downward tendency as the increase at that time equalled about 11% thus exceeding the average percentage increase of 1m<sup>2</sup> in all other years.

## 6. Analysis of the size of the betterment levy

The size of the betterment levy in the municipality of Zielona Góra between 2009-2012 has been calculated using the following formula:

$$OA = (W_{after} - W_{before}) \cdot 30\%$$

where:

OA – the value of the betterment levy,

$W_{after}$  – the value of the real estate after the division,  
 $W_{before}$  – the value of the real estate before the division.

The year 2011 was an exception, as that was when the property valuer deducted the estimated cost of the division of real estate from the difference between the value of the real estate from before and after the division.

Thus calculated, the betterment levy is more beneficial for the owner of the real estate as in the following example. Unfortunately, according to the Provincial Administrative Court in Łódź, it is unacceptable to include the division cost for the purpose of the betterment levy in relation to real estate division. “The possibility of including the expenditures covered by the owner for the purpose of calculating the betterment levy determined in relation to an increase in the value of real estate due to its division was excluded through the proper use of article 148, item 1–3 indicated in article 98, item 4. Item 4 of this article, whose admissibility of applying is excluded, regulates the inclusion of expenditures covered by the owner, as well as payment in nature or own labour for the purpose of calculating the levy. The possibility of including the covered expenditures thus involves only the determining of other betterment levies, i.e. those determined in relation to an increase in the value of real estate as a result of the construction of technical infrastructure facilities.”<sup>13</sup>

Table 6 demonstrates the average size of the betterment levy in relation to division as well as the minimal and maximum size of the fees paid each year.

Table 6

Size of the betterment levy in relation to the division  
of real estate in Zielona Góra in the years 2009–2012

The size of the betterment levy	Years			
	2009	2010	2011	2012
Minimal (PLN)	420	482	360	450
Maximal (PLN)	86 610	60 222	67 950	18 840
Mean (PLN)	8 079	8 926	9 139	4 582
Total (PLN)	880 647	526 630	466 114	114 540

Source: own elaboration.

<sup>13</sup> Decision of the Provincial Administrative Court in Łódź of October 29, 2004., II SA/Łd 50/03.

The costs of formulating a property valuation and the salaries of office employees responsible for the collection of betterment levies exceed the minimal size of the levy itself. At times the size of the levy is high enough to compensate for the expenditures. The highest levy in 2009 equalled 86 610.00 PLN. The owner (natural person) divided their real estate located in the town of Przylep, with an area of 1.4967 ha, to 18 plots, 3 of which were reserved for internal roads, with the other 15 reserved for single-family housing developments.

### **Summary**

The conducted research allows to formulate conclusions on the subject of the betterment levy collection related to an increase in the value of real estate as a result of its division. These include:

1. In the studied period of 2009–2012 the betterment levy in relation to division was calculated following the division of property dedicated for the purposes of single-family housing developments. There are essentially no instances of dividing land dedicated for the realisation of goals related to tourist services.
2. The study showed that the number of plots after the division and their area significantly influence the increase in the value of the property. The largest increase in value occurs when one plot of land is divided into more than 6 plots with an area of less than 0.15 ha.
3. The property valuations formulated as the basis for determining the size of the betterment levy in 2011 by a property valuer who deducted the estimated division costs from the difference in property value from before and after the division, were prepared incorrectly. This was established on the basis of a decision of the Provincial Administrative Court in Łódź from October 29, 2004.
4. The revenues related to the betterment levy with regard to property division are insignificant when compared to the costs of conducting the proceedings for calculating the levy. This undermines the reasoning behind collecting it, if not the justifiability of real estate fees being utilised as part of the Polish legal system.

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## **POBÓR OPŁAT ADIACENCKICH Z TYTUŁU PODZIAŁU NIERUCHOMOŚCI W GMINIE WIEJSKIEJ ZIELONA GÓRA**

### **Streszczenie**

Celem pracy jest ukazanie praktycznych aspektów poboru opłaty adiacenckiej z tytułu wzrostu wartości nieruchomości, na skutek dokonanego podziału. Opłata adiacencka, jako świadczenia publiczno-prawne, zasila budżet gminy. Istotą jej poboru jest wzrost wartości nieruchomości, przynoszący korzyść majątkową właścicielowi lub użytkownikowi wieczystemu, który wniósł opłaty roczne za cały okres użytkowania bądź jest zwolniony z obowiązku jej wnoszenia. Dla realizacji celu pracy dokonano charakterystyki prowadzonych postępowań o ustalenie opłaty w gminie wiejskiej Zielona Góra w latach 2009–2012. W okresie analiz wydano 266 decyzji o ustaleniu opłaty adiacenckiej. W roku 2009 liczba ta wynosiła aż 109 decyzji, lecz z roku na rok malała tak, by w roku 2012 osiągnąć zaledwie 39 decyzji. Wzrost wartości nieruchomości ustalony w operatach szacunkowych na cele naliczenia opłaty, spadał w poszczególnych latach z ok. 8% w 2009 r. do ok. 2% w 2012 r.

**Słowa kluczowe:** opłata adiacencka, podział nieruchomości, Zielona Góra

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**EXTRAVERSION AND ITS IMPORTANCE  
IN THE HOSPITALITY WORKPLACE.  
ANALYSING THE SELECTED JOB OUTCOMES**

**Abstract**

The aim of this study is to investigate both the importance of personality traits of employees working in hotel contact positions and their potential relations with employees' attitudes towards work. The research problem is to approach the following question: is there any relationship between extraversion and employees' job satisfaction, particularly in terms of hotel customers. To achieve the study aim, literature review, including empirical findings of recent studies, and empirical research based on a survey method have been used. The main results of the study have confirmed that hotel employees with higher extraversion experience have a higher level of job satisfaction, also when it refers to customers. Although the study results cannot be generalized, they nevertheless shed light on the importance of the good person-job fit. Therefore, a better understanding of the role of personality in the context of hotel posts may be useful in the hiring decisions, especially in the customer contact positions in hotels. In this study the implications for managers are demonstrated, and directions for future research formulated.

**Keywords:** hospitality, contact employees, extraversion, job satisfaction

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## Introduction

Hospitality is strongly dependent on its human resources<sup>1</sup> and especially on employees who are directly involved in service interactions with their customers. Thus, one of the conditions of the effectiveness of hospitality firms is the quality of their employees seen both as the key resource strongly engaged in the service process<sup>2</sup> and a source of service differentiation.<sup>3</sup>

Taking into account the constant customer contact<sup>4</sup> and a high degree of interactions between hotel employees and guests<sup>5</sup>, employees having direct contact with customers are perceived as a face of hospitality companies<sup>6</sup>, playing a significant role in creating satisfactory service experience for hotel guests.

However, continuous operations and direct (face-to-face) service contacts with guests may be strongly demanding and exhausting for employees. They have to deal with many stressful situations being required to fulfill guests' different needs and expectations and performing various forms of emotional work.<sup>7</sup> Thus, in the face of challenging service encounters, hotel employees' right personality may greatly enhance their ability to better cope with demanding service encounters and built satisfactory relationships with hotel guests.

Given that hotel services are delivered through many social interactions with hotel guests, employees low in social skills may find their work difficult or unpleasant. Thus, extraversion is one of the personality traits that deserves

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<sup>1</sup> J. Hwang, J. Lee, S. Park, H. Chang, S.S. Kim, *The Impact of Occupational Stress on Employee's Turnover Intention in the Luxury Hotel Segment*, "International Journal of Hospitality and Tourism Administration" 2014, No. 15 (1), p. 62.

<sup>2</sup> A. Rapacz, *Zasoby ludzkie w działalności przedsiębiorstwa turystycznego*, in: *Przedsiębiorstwo turystyczne*, ed. A. Rapacz, Centrum Doradztwa i Informacji Difin, Warszawa 2014, pp. 103–120.

<sup>3</sup> S.-H. Tsaur, W.-H. Tang, *The burden of esthetic labor on front-line employees in hospitality industry*, "International Journal of Hospitality Management" 2013, No. 35, p. 19.

<sup>4</sup> H.J. Kim, K.H. Shin, W.T. Umbreit, *Hotel job burnout: The role of personality characteristics*, "International Journal of Hospitality Management" 2007, No. 26 (2), p. 421.

<sup>5</sup> Lewis, B.R., McCann, P., *Service failure and recovery: evidence from the hotel industry*, "International Journal of Contemporary Hospitality Management" 16 (1), 2004, p. 6.

<sup>6</sup> H. Araslı, M. Daşkın, S. Saydam, *Polychronicity and Intrinsic Motivation as Dispositional Determinants on Hotel Frontline Employees' Job Satisfaction: Do Control Variables Make a Difference?*, "Procedia – Social and Behavioral Sciences" 2014, No. 109, p. 1396.

<sup>7</sup> H.J. Kim, *Hotel service providers' emotional labor: The antecedents and effects on burn-out*, "International Journal of Hospitality Management" 2008, No. 27 (2), p. 151.

special empirical attention. However, although the role of personality traits in the hospitality setting seems to be critical for both employees themselves and the organization's effectiveness, the paucity of empirical research on this subject is observed, particularly in the hotel setting in Poland.

Therefore, the aim of this study is to investigate both the importance of hotel employees' personality characteristics and their potential relations with employees' attitudes towards work. Hence the research problem is to approach the following question: is there any relationship between extraversion and employees' job satisfaction, particularly in terms of hotel customers. Additionally, extraversion in the context of socio-demographic variables has also been extensively analyzed. To achieve the study aim, literature review, including empirical findings of recent studies, and empirical research based on a survey method have been used.

The current study opens the door for a better understanding of the pivotal role of employees' personality in the customer-service oriented hospitality industry and sheds light on extraversion as one of the critical characteristics of service providers which may influence hotel business effectiveness.

With reference to the study results, the Author attempts to provide implications for human resources management, both theory and practice, especially in terms of building competitive advantage through people, taking into account the compatibility of individuals and their jobs in the hospitality industry. The limitations and directions for future research are also demonstrated.

## **1. Extraversion of hotel employees as a critical personality trait – implications for the service process**

It is suggested that “individuals possess a stable set of characteristics which predispose them to react in certain ways in a variety of encounters”<sup>8</sup>, which also frequently take place in the hospitality industry. Therefore, among many individual traits influencing the employee's performance, extraversion is particularly expected in the hotel setting, where numerous social skills are strongly required.<sup>9</sup>

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<sup>8</sup> D. Lee-Ross, *The quintessential relationship: service predispositions and quality assurance*, in: *Managing employee attitudes and behaviors in the tourism and hospitality industry*, ed. S. Kusluvan, Nova Publishers, New York 2007, p. 267.

<sup>9</sup> H.J. Kim, K.H. Shin, W.T. Umbreit, *Hotel job...*, p. 424.

The literature on the subject demonstrates that extroverts are individuals described as sociable, gregarious, assertive, talkative and active.<sup>10</sup> Individuals high in extraversion seek out and also enjoy social interactions with others,<sup>11</sup> display higher intensity and frequency of personal interactions, express positive emotions, and show a higher need for stimulation.<sup>12</sup> They are also primarily concerned with the external environment.<sup>13</sup> Therefore, the importance of extraversion in hospitality work results from at least three following arguments:

1. As the literature on the subject indicates, guests, especially those from hotels of higher category, meet approximately 15 employees during they stay.<sup>14</sup> Moreover, they still require and favor direct personal attention of employees.<sup>15</sup> Therefore, given the specific nature of the hotel services and the high degree of interaction with hotel guests, communication with them seems to be essential.<sup>16</sup> It proves that interaction skills, interpersonal and communication competence are of great importance for employees operating in the hospitality industry.

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<sup>10</sup> J.W. O'Neill, Q. Xiao, *Effects of organizational/occupational characteristics and personality traits on hotel manager emotional exhaustion*, "International Journal of Hospitality Management" 2010, No. 29 (4), p. 654; H.J. Kim, K.H. Shin, W.T. Umbreit, *Hotel job...*, p. 424; M. Armstrong, *Zarządzanie zasobami ludzkimi*, Oficyna Ekonomiczna, Kraków 2001, p. 358.

<sup>11</sup> H.J. Kim, J. Agrusa, *Hospitality service employees' coping styles: The role of emotional intelligence, two basic personality traits, and socio-demographic factors*, "International Journal of Hospitality Management" 2007, No. 30 (3), p. 590.

<sup>12</sup> Ch-H. Cheng, *A study of critical factors of the job involvement for hotel employees – Taking hotels in Taiwan as an example*, "International Journal of Hospitality Management" 2011, No. 30 (4), p. 991.

<sup>13</sup> E. Mitura, E. Koniuszewska, *Ekonomika i organizacja pracy w hotelarstwie*, Difin, Warszawa 2006, p. 172.

<sup>14</sup> M. Sidorkiewicz, A. Pawlicz, *Propedeutyka hotelarstwa. Ujęcie ekonomiczne*, Difin, Warszawa 2015, p. 121; C. Witkowski, M. Kachniewska, *Hotelarstwo Vol. III: Hotelarstwo w gospodarce turystycznej*, Wyższa Szkoła Ekonomiczna, Warszawa 2005, p. 128.

<sup>15</sup> M. Casado, *Theory of the effect of Compensation on turnover in hospitality companies*, "Journal of Hospitality and Tourism Education" 2001, No. 13 (3/4), p. 29; H.J. Kim, K.H. Shin, W.T. Umbreit, *Hotel job...*, p. 431.

<sup>16</sup> J. Piasta, *Marketing w hotelarstwie*, Jacek Piasta – Doradztwo, Warszawa 2007, p. 331; M. Kachniewska, *Zarządzanie jakością usług turystycznych*, Difin, Warszawa 2002, p. 45.

2. Interpersonal interactions in tourism take place between members of different nationalities and cultures<sup>17</sup>, particularly in the hotel setting, where a great variety of hotel guests from different backgrounds, both social and cultural, may potentially increase communication problems and other misunderstandings.<sup>18</sup> In this context, extroverts, who, like other people, seek their company and enjoy excitement<sup>19</sup>, may not perceive such situations as difficult or stressful. Their openness to others and communication skills may help them recognize customers' needs and expectations.<sup>20</sup> Therefore, employees high in extraversion may be more likely to contact and interact with different guests and may be better able to serve them successfully.
3. One of the employees' duties is delivering hospitality to hotel guests.<sup>21</sup> However, "guests evaluate hospitality experiences primarily in emotional terms."<sup>22</sup> The literature on the subject shows that service roles frequently demand displaying expected emotions, thus "there is more pressure for the service provider to identify personally with the role."<sup>23</sup> Hence hotel staff, apart from their formal qualifications, skills and knowledge, are strongly required to possess certain personality traits<sup>24</sup> including extraversion<sup>25</sup> which should help people to become much better at recognizing and managing someone's emotions.<sup>26</sup>

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<sup>17</sup> I. Luka, S. Vaidesvarans, D. Vinklere, *Educating Tourism Students for Work in a Multicultural Environment*, "Journal of Teaching in Travel & Tourism" 2013, No. 13, p. 2.

<sup>18</sup> B. Faulkner, A. Patiar, *Workplace induced stress among operational staff in the hotel industry*, "International Journal of Hospitality Management" 1997, No. 16 (1), p. 111.

<sup>19</sup> N.R. Zaidi, R.A. Wajid, F.B. Zaidi, G.B. Zaidi, M.T. Zaidi, *The big five personality traits and their relationship with work engagement among public sector university teachers of Lahore*, "African Journal of Business Management" 2012, Vol. 7 (15), p. 1346.

<sup>20</sup> J. Piasta, *Marketing...*, p. 331.

<sup>21</sup> M. Sidorkiewicz, A. Pawlicz, *Propedeutyka hotelarstwa...*, p. 120.

<sup>22</sup> C. Lashley, *Studying Hospitality: Insights from Social Sciences*, "Scandinavian Journal of Hospitality and Tourism" 2008, No. 8 (1), p. 78.

<sup>23</sup> R.F. Hurley, *Customer service behavior in retail settings: A study of the effect of service provider personality*, "Journal of the Academy of Marketing Science" 1998, No. 26 (2), p. 115.

<sup>24</sup> Z. Rapacz, *Zasoby ludzkie...*, p. 104.

<sup>25</sup> H. Górską-Warsewicz, E. Świstak, *Funkcjonowanie przedsiębiorstwa hotelarskiego*, SGGW, Warszawa 2009, p. 179.

<sup>26</sup> H.J. Kim, J. Agrusa, *Hospitality service employees' coping styles...*, p. 590.

To recapitulate the above discussion, extroversion, which is regarded as “a primary source of positive affectivity”,<sup>27</sup> may strongly influence employees’ ability to provide truly hospitable service leading to guests’ unique service experience.

## **2. Extraversion and its impact on selected work outcomes. Implications for individuals and organizations**

All changes that currently take place in tourism both in terms of economy and marketplace confirm the importance of employees’ personality traits<sup>28</sup> which may influence appropriate customer service behaviors, customer service skills, service orientation and performance of service providers.<sup>29</sup> Therefore, particularly in services, the compatibility of personality and the role should be perceived as critical, since the personality of service providers may influence organizational performance via its impact on employees’ performance.<sup>30</sup> By contrast, personality-role incongruence may negatively influence employee’s productivity and morale<sup>31</sup>, which may decrease the quality of service, an important factor determining customer loyalty in the service industry.<sup>32</sup> To sum up, matching employees properly with their front-line jobs may prevent many potential problems related to labor turnover, absenteeism, and it may increase service quality leading to productivity improvement.<sup>33</sup>

Personality traits may differentiate the way in which individuals deal with service situations and enjoy their work. Given the stressful nature of the hotel

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<sup>27</sup> J.W. O’Neill, Q. Xiao, *Effects of organizational/occupational characteristics...*, p. 654.

<sup>28</sup> A. Rapacz, *Zasoby ludzkie...*, p. 110.

<sup>29</sup> S. Kusluvan, *Employee attitudes and behaviors and their roles for tourism and hospitality business*, in: *Managing employee attitudes and behaviors in the tourism and hospitality industry*, ed. S. Kusluvan, Nova Publishers, New York 2003, p. 38.

<sup>30</sup> *Ibidem*, p. 39.

<sup>31</sup> R.F. Hurley, *Customer service behavior...*, p. 116.

<sup>32</sup> H.S. Jung, H.H. Yoon, *Do employees’ satisfied customers respond with an satisfactory relationship? The effects of employees’ satisfaction on customers’ satisfaction and loyalty in a family restaurant*, “International Journal of Hospitality Management” 2013, No. 34, p. 1.

<sup>33</sup> D. Lee-Ross, *The quintessential relationship...*, p. 264.

work,<sup>34</sup> success or failure of hospitality companies may strongly depend on their employees who will be capable of performing under stress.<sup>35</sup> However, according to the literature on the subject, “what is stressful for one may not be stressful for another”;<sup>36</sup> it may strongly depend on employees’ individual predispositions. Therefore, instead of perceiving some situations as stressful, one may enjoy them and treat as a challenge. In this context, extraversion indeed may help employees to cope well with many difficulties which arise from working with people and social interactions with them. Extroverts, who are described as optimistic<sup>37</sup> and who believe that things will work out,<sup>38</sup> may be less prone to work stress and likely to perceive service difficulties from different, namely optimistic, perspectives.

The results of previous empirical studies demonstrate that extraversion should be perceived as a particularly important personality trait in the workplace. One of the results of Hurley’s study indicated that personality (including a significant role of extraversion) influences customer service behaviors.<sup>39</sup> In the study of Zaidi et al.,<sup>40</sup> extraversion is positively related to work engagement, whereas Dargah and Estalkhbijari<sup>41</sup> find a negative correlation between extraversion and job burnout. Recent research in the hospitality industry has confirmed that extraversion significantly and negatively relates to the emotional exhaustion in the hotel work setting.<sup>42</sup>

The above discussion and empirical findings can also be considered in the context of the Person-Job fit theory referring to the person’s compatibility

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<sup>34</sup> J. Hwang, J. Lee, S. Park, H. Chang, S.S. Kim, *The Impact of Occupational Stress...*, p. 62.

<sup>35</sup> H.J. Kim, K.H. Shin, W.T. Umbreit, *Hotel job...*, p. 422.

<sup>36</sup> Ibidem.

<sup>37</sup> P.T. Costa, R.R. McCrae, *Inwentarz osobowości NEO FFI*, Adapted into Polish by: B. Zawadzki, J. Strelau, P. Szczepaniak, M. Śliwińska, Pracownia Testów Psychologicznych Polskiego Towarzystwa Psychologicznego, Warszawa 1998, p. 15.

<sup>38</sup> J.W. O’Neill, Q. Xiao, *Effects of organizational/occupational characteristics...*, p. 654.

<sup>39</sup> R.F. Hurley, *Customer service behavior...*, p. 115–127.

<sup>40</sup> N.R. Zaidi, R.A. Wajid, F.B. Zaidi, G.B. Zaidi, M.T. Zaidi, *The big five personality traits and their relationship with work engagement...*, p. 1348.

<sup>41</sup> H.G. Dargah, Z.P. Estalkhbijari, *The relationship between the big five personality factors and job burnout*, “International Journal of Asian Social Science” 2012, No. 2 (11), p. 1846.

<sup>42</sup> H.J. Kim, K.H. Shin, W.T. Umbreit, *Hotel job...*, p. 429; J.W. O’Neill, Q. Xiao, *Effects of organizational/occupational characteristics...*, p. 659.

with the job requirements.<sup>43</sup> It is indicated that P–J fit increases employees' satisfaction, commitment and decreases turnover, thus influencing the company's effectiveness.<sup>44</sup> Therefore, by matching the right personality with the right job, employees may feel more comfortable in their workplace and serve better in their contact positions; a result which influences their job satisfaction and finally business effectiveness. As the service profit chain theory states, customers' satisfaction and business profits can be gained only by the quality service performed by satisfied employees.<sup>45</sup> However, this seems likely to happen if the personality-job compatibility is good.

### 3. Method

To approach the question of the relation between employees' extraversion and their job satisfaction, empirical research based on the survey method has been conducted. The research has been realized within a larger project on employees' attitudes and workplace behaviors in hotel organizations. 50 contact employees from two hotels located in the Pomeranian Province participated in it.<sup>46</sup>

Contact employees having a direct relation with hotel guests<sup>47</sup> have been selected, for they are perceived as a "medium" through which organizations interact with their customers<sup>48</sup> as well as because they critically contribute to

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<sup>43</sup> J. Jang, R.T. George, *Understanding the influence of polychronicity on job satisfaction and turnover intention: A study of non-supervisory hotel employees*, "International Journal of Hospitality Management" 2012, No. 31 (2), p. 593; A.L. Kristof-Brown, R.D. Zimmerman, E.C. Johnson, *Consequences of individuals' fit at work: a meta-analysis of person-job, person-organization, person-group, and person-supervisor fit*, "Personnel Psychology" 2005, No. 58 (2), p. 284.

<sup>44</sup> Ch.-Y. Chen, Ch.-H. Yen, F.C. Tsai, *Job crafting and job engagement: The mediating role of person-job fit.*, "International Journal of Hospitality Management" 2014, No. 37, p. 22.

<sup>45</sup> F.C. Pan, *Practical application of importance – performance analysis in determining critical job satisfaction factors of a tourist hotel*, "Tourism Management" 2015, No. 46, p. 84.

<sup>46</sup> A. Grobelna, *Współczesne problemy zarządzania zasobami ludzkimi w hotelarstwie*, „Fluktuacja kadr”, Manuscript in publication, 2015; A. Grobelna, *Role ambiguity: a problem or a challenge facing contemporary hospitality industry. The critical role of employees' creativity*, Manuscript in publication, 2015.

<sup>47</sup> M. Kachniewska, *Zarządzanie jakością usług...*, p. 31.

<sup>48</sup> S.-H. Tsaur, W.-H. Tang, *The burden of esthetic labor on front-line employees in hospitality industry*, "International Journal of Hospitality Management" 2013, No. 35, p. 19.

successful hotel operations.<sup>49</sup> Therefore, they play an important role in linking hotels with their customers and are the most important in the organization from customers' perspective.<sup>50</sup> Thus their predispositions to working with people are of great importance as they may influence employees' ability to perform adequately during numerous social interactions with hotel guests.

In terms of the profile of study respondents, most of them are female (84%) and aged between 21–40 (72%). Over half of them (52%) has a secondary school diploma, whereas 40% of the subjects declare university education. 44% of employees have been working in the hospitality industry up to 10 years, the remaining respondents (56%) declare longer working experience in the industry, namely over ten years. At the time of the study over half of the subject (52%) worked in the current hotel between 1 and 10 years, and 30% of respondents – less than 1 year. The remaining ones declare their working experience in the current organization for over 10 years.

Based on the broad literature review, job satisfaction is assessed via 8 items from Hartline and Ferrell<sup>51</sup> adapted in line with Karatepe and Uludag<sup>52</sup> who have used this scale to measure job satisfaction of hotel employees in Northern Cyprus. Job satisfaction is evaluated in terms of the overall job, co-workers, supervisor/s, hotel's policies, support provided by hotel, pay, opportunities for advancement, and hotel's customers. The latter item is of particular interest to this study.

Extraversion is operationalized via 10 items from *International Personality Item Pool* (<http://ipip.ori.org>).<sup>53</sup> The items – stated negatively from extraversion – are reverse-coded prior to data analysis. The responses to the items are presented on a five-point scale ranging from (1) extremely dissatisfied to (5) extremely

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<sup>49</sup> C.A. Enz, J.A. Siguaw, *Best Practices in Human Resources*, "Cornell Hotel and Restaurant Administration Quarterly" 2000, No. 41 (1), p. 50.

<sup>50</sup> M. Kachniewska, *Zarządzanie jakością usług...*, p. 43.

<sup>51</sup> M.D. Hartline, O.C. Ferrell, *The management of customer-contact service employees: an empirical investigation*, "Journal of Marketing" 1996, No. 60 (4), pp. 52–70.

<sup>52</sup> O.M. Karatepe, O. Uludag, *Conflict, exhaustion and motivation: a study of frontline employees in Northern Cyprus hotels*, "International Journal of Hospitality Management" 2007, No. 26 (3), p. 653.

<sup>53</sup> *International Personality Item Pool: A Scientific Collaboratory for the Development of Advanced Measures of Personality Traits and Other Individual Differences* (<http://ipip.ori.org>); L.R. Goldberg, J.A. Johnson, H.W. Eber, R. Hogan, M.C. Ashton, C.R. Cloninger, H.C. Gough, *The International Personality Item Pool and the future of public-domain personality measures*, "Journal of Research in Personality" 2006, No. 40, p. 84–96.

satisfied in the case of job satisfaction, and from (1) very inaccurate to (5) very accurate in the case of extraversion. The questionnaire has been originally prepared in English and then translated into Polish through back translation to ensure the equivalent meaning for all items. The scales' reliability is assessed by Cronbach's alpha whose values are as follows: 0.85 (job satisfaction); 0.87 (extraversion). The measures in this study show high reliability as the alpha coefficients are above the cut-off value of 0.70.

#### 4. Results

The overall result for extraversion in this study is 3.66; however, women (3.67), well-educated employees (3.82) and younger workers (up to 20 (4.03) and between 21–30 (3.87) describe themselves as rather higher in extraversion than those from other groups. A closer look at extraversion in the light of socio-demographic characteristics has revealed very interesting results.

Generally, the more educated an employee, the higher is the result for extraversion (Figure 1). In other words, as respondents' education increases, they appeared to be higher in extraversion.

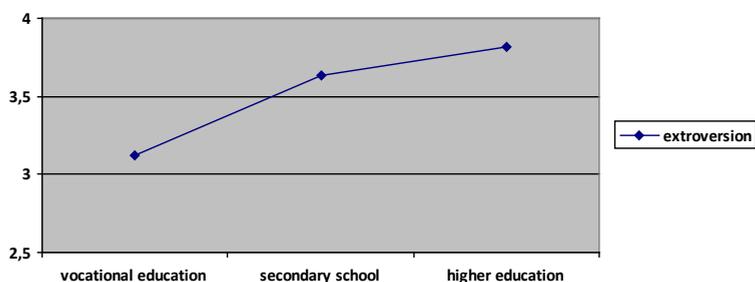


Fig. 1. Extraversion in the context of the educational level

Source: based on own study.

Higher results in extraversion are also observed in the case of hotel employees who declare relatively short working experience (WE), both in the hospitality industry in general and in the current organization. It means that the highest extraversion result is observed in the group of hotel employees who declare their

WE in industry is between 1 to 5 years (4.11) and among respondents whose working experience (WE) in a current hotel does not exceed one year (3.99). However, as work experience increases, results in extraversion decrease in most cases (Figure 2).

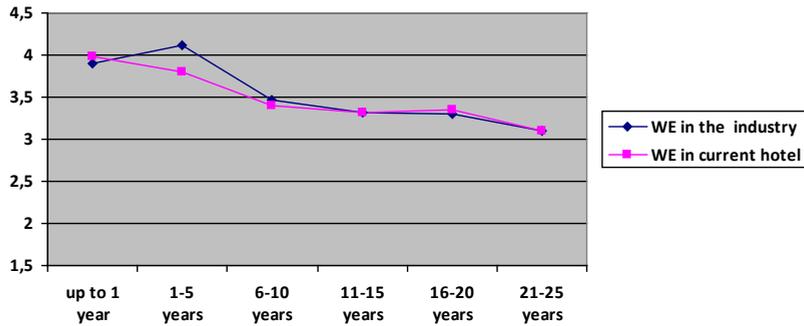


Fig. 2. Extraversion in the context of work experience

Source: based on own study.

Similar results are observed when the respondents' age is analyzed (Figure 3). In this study younger employees appear to be higher in extraversion than the older ones.

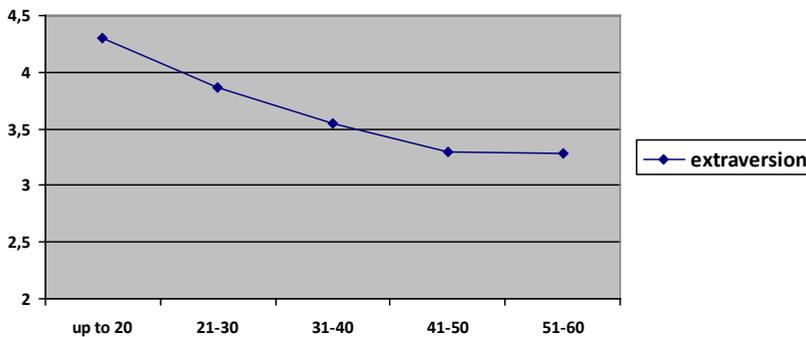


Fig. 3. Extraversion in the context of age

Source: based on own study.

To verify the relationship between extraversion and job satisfaction, Pearson's correlation has been applied. The study results demonstrate that there is both a significant and positive correlation between both study variables ( $r = 0.337$ ;  $p < 0.05$ ) (Table 1). It means that the higher a person describes himself/herself in extraversion, the higher satisfaction s/he experiences from the job.

Table 1

Relationship between extraversion and job satisfaction in general

		Job Satisfaction
Extraversion	Pearson's Correlation	.337*
	p-value	.017
	N	50

Source: based on own study.

Specifically, for the purpose of this study, the relationship between extraversion and job satisfaction but with customers only is of particular interest. Therefore, this relationship has been empirically verified. The results of Pearson's coefficient correlation (Table 2) has showed a fairly strong positive relationship between both extraversion and job satisfaction with customers ( $r = 0.368$ ;  $p < 0.01$ ). It suggests that the higher the result in employee's extraversion, the higher the respondent's satisfaction is with regard to hotel's customers.

Table 2

Relationship between extraversion and job satisfaction in terms of hotel's customers

		Job satisfaction with hotel's customers
Extraversion	Pearson's Correlation	.368**
	p-value	.009
	N	50

Source: based on own study.

Due to the case-study nature of the research, the results cannot be generalized; however, they may serve as a fine base for a deeper discussion on the issue of employee's personality and its meaning for job satisfaction and research assumptions for further empirical studies in the hospitality setting.

## 5. Discussion and implication

This study pays attention to personal characteristics that may determine employee's job satisfaction, especially in terms of hotel customers. This issue seems to be critical in the service sector where inseparability of production and consumption takes place and the organization's success strongly depends on its employees behaving in a service-oriented manner.<sup>54</sup> Therefore, beside employees' formal qualifications and skills also their predispositions to cope well with numerous social interactions with hotel guests seem to be one of the critical factors in the people-oriented hotel industry.<sup>55</sup>

Extraversion has been especially scrutinized in this study, as extroverts are those employees who are cheerful, optimistic, enthusiastic and sociable. Therefore, individuals who are high in these traits can feel better in their contact positions in hotels and successfully operate when numerous interpersonal relations with different customers take place.

The study results have proved that the respondents with higher extraversion are more satisfied, both with their jobs in general and when it refers to customers. This, in turn, may make hotel guests more satisfied as the link between employees' satisfaction and customers' satisfaction is well empirically proved.<sup>56</sup>

The analysis of extraversion relating to socio-demographic characteristics has also revealed that employees with shorter working experience both in the industry and current organization as well as well-educated and younger employees described themselves as higher in extraversion. The plausible explanations of these results may be as follows:

1. It is stated that employees who recently entered the industry may have chosen their career in a more informed way; because entry employees today are more knowledgeable and aware of the labor market and desirable workplace.<sup>57</sup> Thus, they may well know what kind of personality traits are

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<sup>54</sup> S.M. Carraher, J. Mendoza, Ch.E. Carraher, L. Schoenfeldt, *The First Step to Service Excellence in the Global Tourism and Hospitality Environments: Selecting Service-Oriented Personnel*, in: *Managing employee attitudes and behaviors in the tourism and hospitality industry*, ed. S. Kusluvan, Nova Publishers, New York 2003, p. 278.

<sup>55</sup> Ch-Y. Chen, Ch-H. Yen, F.C. Tsai, *Job crafting and job engagement...*, p. 22.

<sup>56</sup> E.g. H.S. Jung, H.H. Yoon, *Do employees' satisfied customers...*, p. 5.

<sup>57</sup> D. Trojanowska, *Polityka personalna w hotelu*, Raport: ABC Inwestycji Hotelowych, „Hotelarz” 2013/2014, p. 40.

strongly needed to be successful in desired hotel jobs and whether their individual profile is suited to work in the hospitality setting.

2. Well-educated employees may have been provided with well-developed career support programs and well-organized internship during their study time, therefore, they might have had an opportunity to test their individual traits, social skills and abilities to decide finally whether a direct contact with customers is congenial to them. The more that the study results of Teng<sup>58</sup> have proved that extroversion shows significantly positive prediction regarding students' attitudes towards hospitality jobs and their intention to work in the industry. It is suggested that students with extroverted personality trait are more likely to have "personality-hospitality jobs fits"; therefore, they will tend to desire to work in highly interactive hospitality sector, in contrast to those without such a trait<sup>59</sup>. Hence well-educated employees in this study may have made a better thought out decision about their careers and so they appeared to be more suited to their jobs when analyzing the extraversion trait.
3. Tourism and hospitality industries have been confronted today with the critical problems of attracting and retaining quality employees.<sup>60</sup> Therefore, to ensure appropriate hotel workers, a more selective recruitment process might have been applied by hoteliers in order to select those whose personality profile is more successful when it comes to catering to guests. This may potentially explain why the respondents who have recently been recruited by hotel firms (with low working experience) describe themselves as extroverts.

Apart from the above plausible explanations, further empirical attention is badly needed to identify other antecedents of these relationships.

The results of the study indicate that understanding the role of employees'

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<sup>58</sup> C.-C. Teng, *The effect of personality traits and attitudes on student uptake in hospitality employment*, "International Journal of Hospitality Management" 2008, No. 27, p. 83.

<sup>59</sup> Ibidem.

<sup>60</sup> Y.K.P. Wan, I.A. Wong, W.H. Kong, *Student career prospect and industry commitment: the roles of industry attitude, perceived social status, and salary expectations*, "Tourism Management" 2014, No. 40, p. 1; R. Lucas, K. Johnson, *Managing students as a flexible labour resource in hospitality and tourism in Central and Eastern Europe and the U.K.*, in: *Managing employee attitudes and behaviors in the tourism and hospitality industry*, ed. S. Kusluvan, Nova Publishers, New York 2005, p. 152.

personality seems to be very important, the more so that the present expectations of tourism industry employees have been moving far beyond the previous requirements<sup>61</sup>, and employees' personality is becoming an increasingly important issue nowadays. The study findings indicate that managers should take a closer look at the extraversion trait as it may have an impact on employees' satisfaction in the workplace, particularly their satisfaction with hotel's customers. To reach the "optimum fit" between service job and employees who perform it, the recruitment process, as stated above, should be more selective to ensure candidates with proper characteristics towards successful working in the hotel setting. The selection should be based on the degree to which employees have personality traits helping them perform well in customer contact positions. Therefore, psychological tests to measure candidates' individual traits<sup>62</sup> as well as service orientation tests and detailed interviews must be brought to managerial attention. This is even more important in view of the fact that in the tourism sector mostly informal methods of employee recruitment have been applied and the use of psychological tests has also been limited.<sup>63</sup> However, managers also ought to be aware of some problems with implementations of psychological tests such as temporary indisposition of candidates, stress, some problems connected with tests' interpretation, etc.<sup>64</sup>

To be successful in their chosen jobs, entry employees should also be informed what kind of personality traits are required from candidates to meet specific job demands and characteristics helping them make an informed career decision.<sup>65</sup>

Finally, it is worth noting that individuals with a proper personality profile will be more successful in their workplace when the work environment is well managed. Thus, as Kim et al.<sup>66</sup> demonstrate, after the recruitment of employees with proper personality traits, the appropriate employment practices such as job autonomy, training, or rewards are strongly needed. In other words, employees must be selected very carefully and then managed in a way which helps make the best use of their personality potential thus contributing to their job satis-

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<sup>61</sup> A. Rapacz, *Zasoby ludzkie...*, p. 110.

<sup>62</sup> A. Tokarz, *Zarządzanie zasobami ludzkimi w sektorze turystycznym*, Difin, Warszawa 2008, p. 77.

<sup>63</sup> M. Sidorkiewicz, A. Pawlicz, *Propedeutyka hotelarstwa...*, p. 190.

<sup>64</sup> A. Tokarz, *Zarządzanie zasobami ludzkimi...*, p. 77.

<sup>65</sup> H.J. Kim, K.H. Shin, W.T. Umbreit, *Hotel job...*, p. 432.

<sup>66</sup> *Ibidem*.

faction and other critical job outcomes, pivotal for the hotel's competitiveness on the contemporary market.

## Summary

Having employees with adequate traits to serve others may greatly enhance a hotel's ability to provide truly hospitable service towards their guests. With this realization, hotel managers need to pay particular attention to personality traits when hiring employees, especially those in contact positions. It is likely that employees with an adequate personality profile compatible with their job expectations can also find their job more satisfying than those who are low in the desired personality traits.

Therefore, this study has focused on the extraversion trait as an important determinant of the employee's job satisfaction in the hospitality setting. The study results have shown that employees' extraversion appears to be vital for respondents' job satisfaction.

However, because the data has the case study nature, the possibilities to generalize the study results are limited. Thus, to validate the value of the study findings future research, both with larger samples and in different hospitality sectors, is strongly recommended.

Taking into account that employees are frequently faced with demanding and difficult customers and still expected to be polite and smile at guests<sup>67</sup>, it is suggested that future studies should take into consideration the potential link between other personality traits (e.g. agreeableness) and employees' job satisfaction. The more so that agreeableness, so far, has not received adequate attention from industry psychologists.<sup>68</sup> Additionally, the influence of service provider's personality on the service quality should be an area of future empirical investigation, especially that this issue seems to be an underexplored area<sup>69</sup> also in the hotel setting.

Summing up, the fit between personality and the job is critical in services<sup>70</sup>,

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<sup>67</sup> H.J. Kim, *Hotel service providers' emotional labor...*, p. 151.

<sup>68</sup> H.J. Kim, K.H. Shin, W.T. Umbreit, *Hotel job...*, p. 424.

<sup>69</sup> R.F. Hurley, *Customer service behavior...*, p. 115.

<sup>70</sup> *Ibidem*.

particularly in the boundary spanning positions such as contact positions in hotels, where employees provide services by themselves<sup>71</sup>, and the success of the organization strongly depends on effective customer relations. Therefore, when competitive advantage is attained through people (employees), their appropriate personality is vital to be satisfied with their job and to successfully provide guests with outstanding service experience.

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<sup>71</sup> Ch-Y. Chen, Ch-H. Yen, F.C. Tsai, *Job crafting and job engagement...*, p. 22.

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## EKSTRAWERSJA I JEJ ZNACZENIE W HOTELARSTWIE. ANALIZOWANIE WYBRANYCH WYNIKÓW PRACY

### Streszczenie

Celem pracy było ukazanie znaczenie cech osobowości pracowników kontaktowych hoteli i ich potencjalnego wpływu na ich postawy wobec pracy. Problemem badawczy było więc poszukiwanie odpowiedzi na pytanie, czy jest związek między ekstrawersją a satysfakcją z wykonywanej pracy, ze szczególnym uwzględnieniem satysfakcji w odniesieniu do klientów. Jako metody badawcze w niniejszej pracy zastosowano krytyczny przegląd literatury przedmiotu, w tym raportów i badań przeprowadzonych w podjętej problematyce oraz badania ankietowe. Główne rezultaty badań potwierdziły istnienie istotnej i pozytywnej korelacji pomiędzy ekstrawersją a satysfakcją z pracy, w tym satysfakcją w odniesieniu do postrzegania relacji z klientami. Badania mają charakter studium przypadku, stąd ich wyników nie należy generalizować, jednakże stanowią one podstawę do merytorycznej dyskusji nad znaczeniem i koniecznością umiejętnego dopasowywania osobowości pracownika do wymagań pracy w hotelarstwie oraz mogą one stanowić założenia badacze dla szerszego kontekstu badań. Stąd w pracy przedstawiono zarówno implikacje dla kadry menedżerskiej jak i sformułowano proponowane kierunki przyszłych badań empirycznych.

**Słowa kluczowe:** hotelarstwo, pracownicy kontaktowi, ekstrawersja, satysfakcja z pracy

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## THE STRUCTURE OF THE HEALTH RESORT TOURISM BRAND

### Abstract

The use of a brand can be very profitable for both consumers and, above all, all producers. The benefits connected with brand building can be also obtained on the tourism market, including the market of health resort tourism. Therefore, the aim of the paper is to present the nature and use of the tourism brand concept on the market of health resort tourism. Activities building a health resort tourism brand require the involvement of all participants of the supply side of the tourism market (brand creators). These activities aim at the brand structure (elements of a health resort tourism product) through marketing (mainly promotion) and quality enhancing activities. Clients (patients, tourists) both consume and verify a tourism brand. A health resort tourism brand distinguished through the marketing concept and supported by identification activities (identity and image) makes it easier to achieve specific economic and social goals of an area of tourism reception. Moreover, it creates possibilities of fulfilling tourists' needs through high-quality services.

**Keywords:** tourism market, tourism brand, health resort tourism

### Introduction

In modern times, a brand becomes one of the most effective management instruments, including the development of marketing activities for both commercial enterprises and *non-profit* institutions as well as for entities undertaking territorial

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marketing activities. The use of a brand can be very profitable for both consumers and, above all, all producers. The benefits connected with brand building can also be obtained on the tourism market, including the market of health resort tourism. Therefore, the aim of the paper is to present the nature and use of the tourism brand concept in the market of health resort tourism. The paper is mainly conceptual.

## 1. Nature of a tourism brand

Defining the nature of a brand requires describing relations between a product and a brand since both terms are closely related. A product is every material (goods) or non-material (services) effect of the production process sold to a consumer fulfilling particular needs and providing particular benefits. A product is a broader term and it is often connected with the production stage whereas a brand comes into existence at the moment of launching a product on the market and, then, it is associated with particular features and values.

A brand is not an unequivocal category and it is often defined as a name, term, sign, symbol, image or a combination of these elements created or drawn up in order to mark a physical product or a service and to distinguish it from the competitors' offer.<sup>1</sup> By accepting the market strategy of brand building, an entity undertakes to continuously provide consumers with a set of features and benefits along with a purchased and, then, consumed product.<sup>2</sup>

The most important feature of a brand is its identification among other brands, or the so-called, "standard" products which are not brands.<sup>3</sup> Brand awareness directly creates clients loyalty towards it and, at the same time, it gives the competitive advantage over other brands (products) on the market. The knowledge and value of a brand stem from its market power consisting of:

- loyalty towards a brand, as a purchasers' tendency to buy products of the same brand,
- brand awareness, as the effect resulting from its existence for a producer,

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<sup>1</sup> H. Mruk, I. Rutkowski, *Strategia produktu*, PWE, Warszawa 1994, p. 55; L. Garbarski, I. Rutkowski, W. Wrzosek, *Marketing. Punkt zwrotny nowoczesnej firmy*, PWE, Warszawa 2001, p. 10.

<sup>2</sup> G. Urbanek, *Zarządzanie marką*, PWE, Warszawa 2002, pp. 13–14.

<sup>3</sup> S. Anholt, *Culture Report. Progress Europe. The Perception of Europe*, Stuttgart 2007, pp. 19–20; S. Anholt, *The Anholt City Brands Index. How The World Views Its Cities*, GMI 2006, p. 3.

- quality level perceived by consumers and attributed to a brand, as the most important element making it beneficial to clients,
- associations connected with a brand (brand identity and image),
- other so-called assets of a brand, e.g. patents, registered trademarks and connections in the distribution system.<sup>4</sup>

Therefore, the existence and functioning of a brand mean that market participants obtain particular benefits. A strong brand provides purchasers with:

- relevant information about purchased products,
- confidence in making purchasing decisions,
- satisfaction from possessing and using a product of a given brand.<sup>5</sup>

Enterprises having brand products on the market gain the following benefits:

- higher effectiveness and efficiency of marketing activities,
- purchasers' loyalty towards a brand,
- more beneficial relation between price and profit,<sup>6</sup>
- development of a brand,
- rise in the number of middlemen,
- competitive advantage.

The functioning of brands can be very profitable for both consumers and, above all, all producers. The benefits identified with brand building can also be obtained on the tourism market.

In order to define a tourism brand, it is necessary to explain the nature of a tourism product. According to the marketing concept, a product can be everything which is the subject of the market exchange. A product is defined as an offer and it can be physical goods, a service or an idea. A tourism product has very often two kinds of meaning. From a narrow perspective, it is everything that a tourist buys (for example, transport, accommodation, catering and cultural services).<sup>7</sup> This meaning is equal to the marketing concept of a product applied as a term in marketing both material goods and services. Currently, a product

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<sup>4</sup> L. Light, *Brand Erosion a Waste of Assets. Trust, Quality and Leadership Important in Creating Lasting Value*, "Business Marketing" 1993, No. 8, p. 37; M.K. Witek-Hajduk, *Zarządzanie marką*, Difin, Warszawa 2001, pp. 52–67.

<sup>5</sup> D.A. Aaker, *Managing Brand Equity. Capitalizing on the Value of Brand Name*, The Free Press, Toronto 1991, p. 17.

<sup>6</sup> J. Marconi, *Marketing marki*, Liber, Warszawa 2002, pp. 53–58.

<sup>7</sup> J. Kaczmarek, A. Stasiak, B. Włodarczyk, *Produkt turystyczny. Pomysł. Organizacja. Zarządzanie*, Polskie Wydawnictwo Ekonomiczne, Warszawa 2010, p. 75.

is examined from the point of view of benefits (usefulness, pleasure) for clients rather than from that of sales value which, in a way, is of minor significance.<sup>8</sup> A broad meaning is associated with the structure of tourism supply and concerns tourists' activities during a tourism trip and at a destination, including tourism advantages, devices and services which they use.<sup>9</sup> From a slightly different perspective, a tourism product is defined as all goods and services produced and purchased in relation to a trip outside a place of living, before the beginning of a trip as well as during a stay outside a place of living.<sup>10</sup>

The term of a tourism brand should be associated with the term of a brand tourism product. The term of a tourism brand conveys the specificity of the issue more fully in conditions of the tourism market since it is not directly associated with the term of a brand product which is extensively used on the other markets. In a similar way to a tourism product, a tourism brand can also be defined from:

- a narrow, analogical perspective as in the case of brands used in other sectors of the economy (industry and service sectors),
- a broad perspective concerning tourism areas and attractions,<sup>11</sup> as a set of activities aiming at a regional tourism product.

Therefore, a tourism brand from a narrow perspective should be associated with a service offer of particular tourism market entities.<sup>12</sup> However, from a broad perspective it concerns: regions, areas, places and single tourist attractions. In the case of tourist attractions it is necessary to point out that they are surrounded by tourism infrastructure.

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<sup>8</sup> M. Zdon-Korzeniowska, *Jak kształtować regionalne produkty turystyczne? Teoria i praktyka*, Wydawnictwo Uniwersytetu Jagiellońskiego, Kraków 2009, p. 13.

<sup>9</sup> A. Panasiuk, *Rynek turystyczny. Studium strukturalne*, Difin, Warszawa 2014, pp. 182–184; A. Panasiuk, *Produkt turystyczny*, Zeszyty Naukowe „Oeconomicus”, Wyższa Szkoła Zawodowa „Oeconomicus”, Szczecin 2001, pp. 73–75; H. Zawistowska, *Rola Unii Europejskiej w poprawie jakości produktów turystycznych*, in: *Kierunki rozwoju badań naukowych w turystyce*, ed. G. Gołębski, Wydawnictwo Naukowe PWN, Akademia Ekonomiczna w Poznaniu, Warszawa 2003, p. 69.

<sup>10</sup> S. Wodejko, *Ekonomiczne zagadnienia turystyki*, PWSH, Warszawa 1997, p. 23.

<sup>11</sup> B. Meyer, *Obszarowy produkt turystyczny jako efekt relacji pomiędzy grupami interesu*, in: *Gospodarka turystyczna a grupy interesu*, ed. S. Wodejko, SGH, Warszawa 2006, p. 344.

<sup>12</sup> A. Panasiuk (ed.), *Marketing w turystyce i rekreacji*, Wydawnictwo Naukowe PWN, Warszawa 2013, pp. 259–261.

Marketing activities connected with tourism brands in a narrow sense are aimed at consumers of tourism services provided by: hoteliers, travel agencies, tourism carriers, restaurateurs and the like. These consumers become tourists when they are at a destination and use other elements building the so-called broad tourism brand.

With reference to the marketing theory, a tourism brand in a broad sense takes a form similar to combined brands<sup>13</sup> i.e. those created by a local government, tourism organizations and associations, and tourism services providers. Analogically, it can concern activities at the central level where tourism brands can be created by a national tourism organization and tourism services providers offering services on the domestic and international markets.

The above discussion thus allows us to formulate a – suggestively – broad definition of a tourism brand. It should be understood as a comprehensive tourism product which is easily identified by potential tourists, stands out from competitors' offers and continuously represents a high level of quality. It is created in cooperation with government units, tourism organizations and tourism sector and significantly supported by marketing activities, and, at the same time, fulfilling tourism needs and creating tourists' satisfaction. Depending on the scope of influence, one can distinguish domestic tourism brands and those functioning on the international tourism market. At the same time, it means that the wider the extent of market influence is, the higher the position and greater market power a particular tourism brand potentially has.

The crucial issue which decides on the possibility of a tourism brand becoming recognizable is the constant improvement of quality. It entails the necessity of adjusting the tourism product concept to tourists' needs. The level of quality, from the point of view of human needs diversification, is treated, by both consumers and producers, as one of the most important effects of all kinds of activities, especially concerning services. The responsibility for creating the level of quality should be taken by particular entities which develop a tourism brand, that is tourism sector entities, a local government, tourism organizations responsible for building a new tourism product.

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<sup>13</sup> A. Panasiuk, *Założenia koncepcji marki turystycznej*, „Marketing i Rynek” 2004, No. 8, pp. 2–7; A. Panasiuk, *Marka turystyczna jako instrument zarządzania regionalną gospodarką turystyczną w warunkach sytuacji kryzysowych*, „Współczesne Zarządzanie” 2013, No. 1, pp. 21–30.

## 2. Health resort tourism

Health resort tourism is a form of medical tourism and constitutes an element of the tourism market distinguished from the point of view of motivation for tourist activities. This form of tourism matches an offer which results from comprehensive functioning of the tourism market entities with a specialist offer meeting the needs of tourists who choose health resort tourism (i.e. patients). The part of the specialist health resort tourism offer can be a basis for creating demand of tourists staying in health resorts for some other than therapeutic reasons. Then, the health resort tourism offer is a supplementary way to fulfil their touristic needs in the health resort destination.

Health resort tourism is defined as visits involving sanatorium treatment, rehabilitation treatment and health resort treatment, and are connected with natural medicine therapy provided after a consultation with a doctor from a health resort.<sup>14</sup> Therefore, a basis for health resort tourism is health resort treatment socially considered not only as part of medicine, but also an element of the tourism sector. Health resort treatment takes the form of treatment in natural medicine centres where patients choose from the therapies using natural wealth (health resort advantages), including curative waters, peloid, or gases. An important part of health resort treatment is staying in a place with a local curative climate. Apart from treating patients, prevention is also an important health resort activity.<sup>15</sup>

Health resort tourism should be treated as an important and specific form of medical tourism. The special nature of health resort tourism results from, above all, the purpose and motive for a trip to a place considered a health resort and also from the needs to make use of services provided by health resort companies. The main motives for health and wellness activities include, among others: strength regeneration, influence on health and wellbeing, active holiday.<sup>16</sup> These aims can be achieved not only through health resort tourism, but also,

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<sup>14</sup> M. Januszewska, *Znaczenie produktu uzdrowiskowego w rozwoju turystyki w Polsce*, in: *Markowe produkty turystyczne*, ed. A. Panasiuk, Fundacja na rzecz Uniwersytetu Szczecińskiego, Szczecin–Niechorze 2004, p. 219.

<sup>15</sup> E. Bańkowska, *Szanse i zagrożenia Sopotu jako miejscowości uzdrowiskowej*, in: *Turystyka uzdrowiskowa. Stan i perspektywy*, Publikacje Wyższej Szkoły Turystyki i Hotelarstwa w Sopocie, Gdańsk, 1999, p. 191.

<sup>16</sup> W.W. Gaworecki, *Turystyka*, Polskie Wydawnictwo Ekonomiczne, Warszawa 2000, p. 36.

for example, through active or holiday tourism.<sup>17</sup> One should bear in mind that, with regard to the demand, a health resort tourist also creates other needs fulfilled by the remaining elements of the tourism supply structure.

C. Kaspar and P. Fehrlin suggest defining health resort tourism as a set of relations, activities and phenomena which result from stays that people choose because of health and wellness reasons, and from visits to health resorts and returns to their places of living.<sup>18</sup>

### **3. Health resort tourism market**

The tourism market can be analyzed considering industry aspects (hotels, travel agencies, carriers, etc.), segment criteria, or purposes (motives) of travelling. In practice, every tourism enterprise can divide the market according to their own selected criteria. For cognitive and practical reasons, each market and its features can be described through a subject of exchange, entities existing on this particular market, demand and supply features as well as the so-called conditions for entering the market. The knowledge of these tourism market features is necessary to make rational decisions by tourism sector entities.<sup>19</sup>

The health resort tourism market is one kind of tourism market. This market is isolated when it comes to motives for travelling, i.e. trips whose main or additional purpose is to influence health as well as physical and mental condition of a tourist. The health resort tourism market is also a special business combining elements of other tourism businesses, mainly the hotel industry, but, at the same time, involves the medical business, i.e. health resort treatment.

The aforementioned definition by C. Kaspar and P. Fehrlin is a basis for defining the essence of the health resort tourism market and, then, indicating its elements of the subject and object structure. The health resort tourism market, from the point of view of subjects, is a process in which clients (health resort tourists) and service providers (producers of tourism and health services, and health resort

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<sup>17</sup> A. Panasiuk (ed.), *Gospodarka turystyczna*, Wydawnictwo Naukowe PWN, Warszawa 2008, pp. 231–235.

<sup>18</sup> C. Kaspar, F. Ferlich, *Marketing Konzeption der Heilböund Kurorte B16*, Hochschule St. Gallen 1979, p. 14.

<sup>19</sup> J. Altkorn, *Marketing w turystyce*, Wydawnictwo Naukowe PWN, Warszawa 1998, p. 19.

tourism destinations – i.e. health resorts) define a subject of the market exchange – services in a health resort, their prices, terms and conditions of sale.<sup>20</sup> Following this interpretation, the health resort tourism is an element of the tourism market and has two fundamental functions of:

- cure, rehabilitation and prevention,
- leisure.

Through functions mentioned above, health resort tourism market offers (tourist and medical) mix with offers aiming at demand which is met by the remaining tourism markets, e.g. leisure, cognitive and adventure tourism. Therefore, health resort tourism is created through combining medical and preventive functions with the tourist function.<sup>21</sup> Taking the spatial aspect of health resort tourism into consideration, this takes place in a health resort that has gained the status of a health resort, or else, an area where health and wellness services are provided, and which has been selected in order to use and protect its natural medicine resources.<sup>22</sup>

The fundamental entities functioning in the health resort tourism market are:

a) regarding the demand:

- health resort tourists (patients),
- other tourists (not patients) staying in a health resort and using offered services as supplementary ones;

b) regarding the supply:

- health resort enterprises (e.g. sanatoriums, natural medicine centres, spa and wellness centres),
- other tourism enterprises offering services for both patients and other tourists,
- enterprises offering tourists, including patients, paratourist services whose main function is fulfilling needs of regular residents of a health resort;

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<sup>20</sup> A. Panasiuk (ed.), *Ekonomika turystyki i rekreacji*, Wydawnictwo Naukowe PWN, Warszawa 2011, pp. 113–114.

<sup>21</sup> D. Dryglas, *Kształtowanie produktu turystycznego uzdrowisk w Polsce*, Uniwersytet Jagielloński, Kraków 2006, p. 264.

<sup>22</sup> A. Lewandowska, *Turystyka uzdrowiskowa. Materiały do studiowania*, Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, Szczecin 2007, p. 21.

- c) regarding the tourism policy:
- authorities regulating functioning of the health resort treatment and tourism sector,
  - local governments of health resorts and their associations (Association of Polish Spa Communities),
  - health resort tourism organizations (Chamber of Commerce “Polish Spas”),
  - tourism business organizations.

The health resort tourism market can be developed mainly owing to supply elements of the general tourism market. It is supplemented by elements relevant to motives for health resort tourism, i.e. those resulting from activities of sanatoriums and health resort hospitals which are a special kind of health and wellness accommodation. The motives typically identified with health resort tourism are treatment and rehabilitation. The typical supply elements within the health resort tourism market are health service (as an element of the medical services market) and health and wellness centres (as a form of activity including both medical and tourism service markets). Although such aspects as the use of health resorts advantages (e.g. brines, peloid), activities of spa and wellness centres, and local health resort infrastructure (e.g. mineral water pump rooms, spa parks) largely affect patients' demand, they also have influence on the demand of tourists coming to health resorts for other purposes. Thus, the said elements of the supply structure provide them with complementary services.

#### **4. Components of the health resort tourism brand**

Entities involved in creating tourism are of great importance in the concept of creating a brand tourism product. Entities affecting a brand health resort tourism product include entities representing the supply side of the market, especially health resort enterprises with support from local governments, institutions involved in tourism activities and residents of health resorts and regions.

The structure elements of a brand can be a basis for creating a health resort tourism product and to promote and give it a title of a brand product require an individual approach. The model of the structure of a health resort tourism brand is shown in Figure 1.

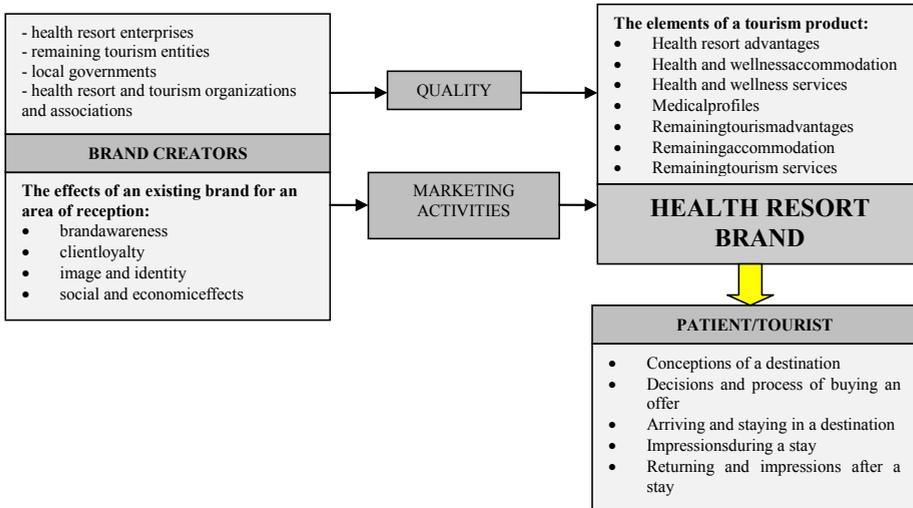


Fig. 1. Structure of the health resort tourism brand

Source: A. Panasiuk, *Marka turystyczna. Założenia metodyczne*, in: *Markowe produkty turystyczne*, ed. A. Panasiuk, University of Szczecin Foundation, Niechorze 2004, p. 123.

Discussing a health resort tourism brand, two elements must be emphasized, i.e. brand creators and consumers – patients (tourists). Brand creators are entities of the supply structure responsible for functioning of health resort tourism in a place and region and have to achieve as good results as possible. Owing to marketing tools and high-quality services, a health resort tourism product– brand product– is created on the basis of the existing tourism potential. One should also remember that a brand product is created in direct cooperation with patients (tourists) for whom this product should be attractive.

## Conclusion

The scope of issues addressed constitutes the synthesis of matters connected with tourism market structures together with places of health resort tourism. The development of the tourism market concerns both the supply and the demand side. Supply is developed through new innovative offers launched on the market. What also matters within the tourism market is creating new tourism destinations

providing broad and/or specific tourism offers. Changes in demand can be observed owing to new forms of tourism. These processes are mutually influential. The general tourism market develops owing to specific markets. Specific markets expand their structure through the general and comprehensive market which can be local, regional and national. It appears that the structural development of the tourism market is determined by the development of specific markets (including health resort tourism) whereas the development of specific markets is not possible without the well-developing tourism market.

Activities building a health resort tourism brand require involvement of all participants of the supply side of tourism market (brand creators). These activities aim at the brand structure (elements of a health resort tourism product) through marketing (mainly promotion) and quality enhancing activities. Clients (patients, tourists) both consume and verify a tourism brand. A health resort tourism brand distinguished through the marketing concept and supported by identification activities (identity and image) makes it easier to achieve specific economic and social goals of an area of tourism reception. Moreover, it creates possibilities of fulfilling tourists' needs through high-quality services.

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## STRUKTURA MARKI TURYSTYKI UZDROWISKOWEJ

### Streszczenie

Ze stosowania marki wynikają wysokie korzyści zarówno dla konsumentów, jak i przede wszystkim producentów. Korzyści związane z kreowaniem marek można uzyskiwać także w warunkach rynku turystycznego, w tym turystyki uzdrowiskowej. Stąd celem niniejszego opracowania jest prezentacja istoty i wykorzystania koncepcji marki turystycznej na rynku turystyki uzdrowiskowej. Działania objęte kształtowaniem

marki turystyki uzdrowiskowej wymagają zaangażowania wszystkich uczestników strony podaźowej rynku turystycznego (kreatorzy marki). Działania te skierowane są poprzez działania projakościowe i marketingowe (głównie promocyjne) na strukturę marki (elementy produktu turystyki uzdrowiskowej). Konsumentem a jednocześnie weryfikatorem rynkowym marki turystycznej są konsumenci (kuracjusze, turyści). Marka turystyki uzdrowiskowej wyodrębniona poprzez koncepcję marketingową, wsparta działaniami identyfikującymi (tożsamość i wizerunek) sprzyja realizacji osiągania określonych celów ekonomicznych i społecznych obszarów recepcji turystycznej. Ponadto stwarza możliwości zaspokojenia potrzeb turystów na wysokim poziomie jakościowym.

**Słowa kluczowe:** rynek turystyczny, marka turystyczna, turystyka uzdrowiskowa



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**INNOVATIVE LOCAL COMMUNITY PARTNERSHIP  
AND SUSTAINABLE URBAN TOURISM –  
THE OLD TOWN IN WARSAW**

**Abstract**

It is a fact that in the past decades several of Polish towns and cities functioned as popular tourist destinations, but heritage tourism and especially one of its segments – urban tourism – has grown significantly in recent years. As a result of socio-economic transformation, more income, higher levels of education, growing awareness of our country, globalization process (access to EU) and better tourist infrastructure (transport, accommodation) now we can experience bigger tourists interest in our historic cities. Today especially Cracow and Warsaw have been visited by millions of tourists per year. Needless to say that the main attraction for tourists there are the historic centres of these cities, the Old Town in Warsaw and the Old Town in Cracow.

**Keywords:** historic cities, sustainable tourism, innovate partnership, local community

**Research question and methods**

As tourism develops in the historic centres, it brings about recognisable ecological, cultural, social and economic transformations. Today the tension clearly exists between users of “shared space”, between visitors and those who

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work and live in and around heritage sites. Different and sometimes competing requirements should be reconciled especially in the context of balancing the needs of visitors and residents of a site. Our research study (conducted by the author in the Joseph Pilsudski AWF University Warsaw, 2010–2014) concerns the phenomenon of heritage tourism and its impact on local community members of the Old Town in Warsaw. We are interested both in the negative and the positive consequences, in revealing the socio-cultural impacts that cultural tourism has on the historic district residents (host community). We intend to shape our research in the form enabling us to achieve applied results and hope to find a solution for the sustainable heritage tourism development. To measure these issues from the different perspectives we use the combination of methods as our aim has been to achieve a balance between quantitative and qualitative approaches: the academic studies of published resources and the spatial plans (quantitative secondary data analysis) as well as the case study – primary data in the form of observations, semi-structured and structured interviews, conducted between the local community and the local authority representatives.

## **Results and Conclusions**

Our research demonstrates that the most important aspects of the physical damage at the historic site are wear and tear, litter, pollution, noise and vandalism. The throngs of people filling the narrow streets and anti social behaviour of some of the tourists are the major disruptions listed by the local community members of the Old Town in Warsaw. Some of the locals mentioned the lack of shops with food and very high prices at the few groceries which are today in the minority among the numerous restaurants, banks, fancy boutiques and souvenir shops – targeting with their offer rich tourists and much less interested in the residents group. Sadly, very active in the past, the Association of Old Town Residents (founded in 2000) today cannot contribute as effectively in shaping the spatial policy as potentially it could because most of its members have not legal rights to their apartments. Without the clear position, they are treated only as the tenants of communal properties and as a “weak” partner for the Warsaw City Council Office. In order to obtain an equilibrium between the potential tourism growth, conservatory needs and quality of the host community life, all stakeholders’ interests and objectives regarding tourism development must

be incorporated in the Local Planning process (conservatory, hosts and visitors taken into account). To answer these questions, a present planning process should be revised and a more integrated approach to local planning will be applicable as an attempt to solve spatial conflicts and to build higher tolerance between local community members and tourists when sharing the historic space. Our proposal of the integrated planning process for the Old Town in Warsaw is aimed at addressing the unique feature and specific nature of this site and to find a balance between the conservation needs, heritage tourism development and the local community expectations.

## **Introduction**

It is a fact that in the past decades several of the Polish towns and cities have functioned as popular tourist destinations, but heritage tourism and especially one of its segments – urban tourism – has been growing significantly in the recent years. As a result of socio-economic transformations, growing income, higher levels of education, growing awareness of our country, globalisation process (access to EU) and better tourist infrastructure (transport, accommodation), we can now experience tourists' greater interest in our historic cities. Moreover, our cities, as tourist destinations, offer to Western European visitors some fascinating but relatively low-cost cultural experiences. Interestingly, although many Polish historic cities are currently attempting to diversify their tourism offer (as spa tourism) – cultural and heritage tourism has remained the most popular. Today especially Cracow and Warsaw are popular, visited by millions of tourists per year (in 2009: Warsaw by 8 900 000 and Cracow by 4 100 000), by people coming from Poland (71%) and abroad (29%). The origin of overseas tourists is mainly Germany (12.0%), Spain (10.8%), UK (9.9%), France (9.8%) and US (9.0%).<sup>1</sup> The average stay amounts to about 6 days, but Warsaw and Cracow are also visited by millions of one-day excursionists, not staying overnight (Warsaw by 3 200 000 per year).<sup>2</sup>

Needless to say, the main attraction for tourists and for one-day excursionists are the historic centres: the Old Town in Warsaw and the Old Town

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<sup>1</sup> <http://www.intu.gov.pl>.

<sup>2</sup> *Ibidem*.

in Cracow – both sites having the prestigious UNESCO World Heritage Site status. As other UNESCO Heritage Sites, the Old Towns in Cracow and the Old Town in Warsaw are very popular, in some summer months even extremely overcrowded and they need to develop and apply a new approach to tourism development. This is not a new problem and a number of possible negative consequences of tourism in the historic sites has already been mentioned by scholars some years ago.<sup>3</sup> For example, different local society groups or individuals may benefit or suffer disproportionately from the tourist development, what leads to unwelcomed tensions, and often opened conflict. However, today we have the knowledge and planning tools enabling to minimize negative effects on historic, natural and social environment. Still – it is not too late for the Old Town in Warsaw, and now there is an urgent need to shape a rational strategic planning to the site management in order to safeguard the outstanding values of heritage, protect local community wellbeing and achieve sustainable tourism and economic development of the region.

Today residents of the Old Town in Warsaw form a very special community group and living among historic monuments they have developed a strong sense of tradition and heritage on one hand, and, at the same time, a grudge towards tourism on the other. Most of the local community members have been living in the Warsaw Old Town since 1950, in what in the post-WWII reconstruction period has been known as the “communal apartment.” Today it seems that they truly care for the historic fabric preservation, restoration and maintenance, being very proud of the tradition and symbolic meaning of the site. Yet, as tourism develops in this historic centre, it brings about recognisable ecological, cultural, social and economic changes, most of them very damaging from the local community point of view. For example, the re-introduction of the market economy in Poland has changed the landscape and, to meet tourist demands, many B&B, hostels, restaurants, night clubs opened in the Old Town area replacing grocery shops, milk-bars and local bookshops. One can notice that the tension clearly

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<sup>3</sup> G.J. Ashworth, *Heritage Planning: an approach to Managing Historic Cities*, in: *Managing Historic Cities*, ICC Kraków 1997, pp. 27–49; G.J. Ashworth, *Whose history, whose heritage? Management means choice*, in: *Managing Tourism in Historic Cities*, ICC Kraków 1992, pp. 57–67; D. Goetz et al., *Stakeholder involvement in sustainable tourism: balancing the voices*, in: *Global Tourism*, ed. W.F. Theobald, Elsevier, Burlington 2005, pp. 230–248; M. Paszucha, *Historic City Tourism and Polish Tourism Policy*, in: *Managing Tourism in Historic Cities*, ICC, Kraków 1997, pp. 37–43; M. Selby, *Understanding Urban Tourism: Image, Culture, Experience*, I.B. Tauris, London 2004.

exists between users of the “shared space:” visitors to the Old Town in Warsaw and those who work and live in and around heritage site.

On the other hand, the development of the tourist industry is more than a question of economic necessity; it is a chance to contribute to a better protection of historic monuments and, in the broader perspective, to urban regeneration. In consequence, this situation calls for new solutions in establishing the sustainable interrelationships between both the preservation of heritage potential of the Old Town and of the New Town in Warsaw, tourist development and satisfactory services there. At the same time, the local community must have strong rights to meet their expectations, needs and no changes in their everyday life routine guaranteed. Is it right to be interested in the Old Town community as one of the basic units of tourism development? Some scholars argue that from a postmodernist perspective and as a consequence of increasing mobility of society, global communication, there is no point in such studies, while some insist on taking the opposite approach.<sup>4</sup> However, the Old Town in Warsaw differs from those in London or New York in that most of its residents are long-term and the core is formed by place-based families permanently identified with the site (often the second or third generation).

## 1. Research questions and methods

Our research study (conducted by the authors in the Faculty of Tourism and Recreation Joseph Pilsudski AWF University Warsaw, 2010–2014) concerns the phenomenon of heritage tourism and its impact on the cultural values and the local community members inhabiting the Old Town in Warsaw. The assumption is to develop a fully integrated, interdisciplinary approach while addressing the complex issue of the Old Town characteristics and heritage tourist development implications. We are interested both in the negative and the positive

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<sup>4</sup> J.E. Innes et al., *Reframing public participation: strategies for 21st century*, “Planning Theory & Practice” 2004, Vol. 5, No. 4, pp. 419–436; M.B. Lane, *Public Participation in Planning: an intellectual history*, “Australian Geographer” 2005, Vol. 36, No. 3, pp. 283–299; A. Panasiuk, *Instrumenty polityki turystycznej na poziomie regionalnym i lokalnym*, in: *Nowe wyzwania gospodarki turystycznej na poziomie lokalnym, regionalnym i międzynarodowym*, Białystok 2011, pp. 87–107; G. Richards et al., *The community: a sustainable concept in tourism development?*, in: *Tourism and sustainable community development*, ed. D. Hall et al., Routledge Advances in Tourism, London 2002, pp. 17–19; J. Urry, *Consuming places*, Routledge, London 1995, p. 13.

consequences, in revealing the socio-cultural impacts that cultural tourism might have on the local residents (host community). In our research we include an analysis of the various stakeholders such as the Local Authority of Centrum Borough, the Warsaw City Council, the Conservatory of Heritage in Warsaw Office, tourism industry, local community members; their priorities and visions of sustainable tourism development. We focused on the following key elements:

- a) identifying the focal group of stakeholders for the Old Town in Warsaw; determining the potential interests groups and their point of view on tourism development;
- b) examining the local community characteristic and background, its needs and expectations as well as visions for shaping the “shared space”, revealing internal conflicts within local community members;
- c) presenting the effort of Warsaw City Government to develop, validate and deploy a strategy of urban sustainable management, partnership and local community involvement aimed at creating a better tourism policy and improve the management, planning and implementation practices in Warsaw.

We regard the host community of the Old Town in Warsaw and its vision on tourism development (as presented in this paper) to be crucial for sustainability. Many scholars believe that the strategies for the heritage tourist sustainable development should be elaborated with the active participation of local communities, considered an important partner in the whole project process.<sup>5</sup> However, with some limits, two approaches: the “bottom-up” and “top-down” should be combined to achieve sustainability. We intend to shape our research in the form enabling us to achieve applied results and hope to find a solution for the sustainable heritage tourism development. To measure these issues from different perspectives we use a combination of methods as we have aimed to achieve a balance between the quantitative and the qualitative approaches: the academic studies of published resources and spatial plans (the quantitative secondary data analysis) as well as the case study on the Old Town in Warsaw

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<sup>5</sup> B. Garrod et al., *Managing heritage tourism*, “Annals of Tourism Research” 2000, Vol. 27, No. 3, pp. 682–708; A. Apostolakis, *The convergence process in heritage tourism*, “Annals of Tourism Research” 2003, Vol. 30, No. 4, pp. 796–812; A. Panasiuk, *Instrumenty polityki turystycznej w regionie*, Prace Naukowe Uniwersytetu Ekonomicznego we Wrocławiu Vol. 50, Gospodarka turystyczna w regionie, Wrocław 2009, pp. 15–23; G. Richards et al., *The community...*, pp. 11–23.

so as to obtain the primary data in the form of observations, semi-structured and structured interviews conducted between the local community and local authority representatives – as recommended by the well recognised researches in tourism.<sup>6</sup>

## 2. Case study: the Old Town in Warsaw

The Old Town in Warsaw (in Polish: “Stare Miasto” or, colloquially, “Starówka”) is the oldest historic district of Warsaw. It covers about 10 hectares only and is framed by the Vistula River Valley in the East, the Central Town District (“Centrum” in Polish) in the South and the West, and the New Town District (“Nowe Miasto”) in the North. The Old Town Market, located at the centre of the Old Town, well known for its numerous restaurants, cafes and souvenir shops, is commonly believed to be one of Warsaw’s most prominent tourist attractions. Surrounding streets feature the medieval architecture such as the city walls, the Barbican and the St. John’s Cathedral. The Old Town in Warsaw was established in the 13th century. Initially it was surrounded by an earthwork rampart; after the year 1339 it was fortified with the brick city walls. The Old Town originally grew up around the castle of the Dukes of Mazovia that later became the Royal Castle of Warsaw. The Market Square (“Rynek Starego Miasta”) was laid out sometime in the late 13th or early 14th century along the main road linking the Castle with the New Town at the North. Until 1817 the Old Town’s most notable feature was the Town Hall built before 1429 to be eventually demolished in 1817. The spacious Castle Square (today a forecourt to the Royal Castle) got its regular plan in 1644 to become a honourable setting for the King Sigismund The Third Column. In 1701 the Castle Square was again rebuilt by the famous architect Tylman von Gameren and later enlarged in 1818–1821 by the architect Jakub Kubicki. In the late 1930s, during the presidency of Stefan Starzyński, the municipal authorities began refurbishing the Old Town and restoring it to its former glory. The Barbican and the Old Town Market Place were partly restored. These efforts, however, were brought to an end by

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<sup>6</sup> J.T. Dallen et al., *Heritage Tourism*, Prentice Hall Harlow 2003; M. Finn et al., *Tourism & Leisure Research Methods*, Pearson Longman Harlow 2000; K.M. Smith, *Issues in Cultural Tourism Studies*, Routledge, New York 2003; J. Phillimore et al., *Qualitative Research in Tourism*, Routledge, New York 2005.

the outbreak of WWII. In September 1939, during the invasion of Poland, much of the district was badly damaged by the Nazis who targeted the city's residential areas and historic landmarks in the terror bombing campaign. A few years later, some of the hardest-fought battles of the Warsaw Uprising took place there. After the Warsaw Uprising (August–October 1944) what had been left was blown up by the German Army, utterly destroying the historic urban structure. The Old Town, as practically the whole left river bank town, was a sea of rubble and ruins. Some statistic data could picture this disaster: of Warsaw's 957 historical buildings – as much as 782 were completely demolished, 141 were partially destroyed, and only 34 escaped annihilation (what makes only 3% survived of the total number).<sup>7</sup> Most of the inhabitants of the Old Town were killed by the Nazis and the survivors were then moved out of the city. The remaining buildings were demolished and on January 17th, 1945 less than 5% of the houses were still habitable. After WWII, the Old Town and the New Town were meticulously rebuilt with the use of the original bricks whenever it was possible. All decorative elements (or parts of) available – were reused and reinserted into original places. Often, Bernardo Bellotto's (Canaletto), 18th century vedutes were used as a source of information, very helpful during the reconstruction planning process. The line of the houses along the northern side of the Main Market (Dekert Side) were linked together in the post-war reconstruction and today their interiors house the Historical Museum of the City of Warsaw. The permanent exhibition shows plans, views, models and archive photos documenting the history of Warsaw from its beginning until contemporary period. The last historic monument to be rebuilt was the Royal Castle (restored in 1971–1981), today the great landmark commanding the Castle Square. The Old Town reconstruction was very expensive, both in terms of money and communal effort. Despite the political feelings and attitudes in the post-war time, Polish workers together with the “inteligencia group” (middle class professionals) worked very hard, determined to rebuild their city heritage. Their strong motivation and remarkable speed have gained them worldwide admiration. The Old Town in Warsaw has been on the UNESCO list of World Heritage Sites as “an outstanding example of a near-total reconstruction

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<sup>7</sup> Polish Urban Planning Society & Warsaw Capital City Office (WCCO), *Warsaw Physical Development*, Polish Urban Planning Society, Warszawa 1997, pp. 21–45; Warsaw Capital City Office (WCCO), *Warsaw Development Strategy*, Warszawa 2007.

of a span of history covering the 13th to the 20th century.”<sup>8</sup> Following the political changes after 1989 and the opening up for foreign tourists, the Old Town in Warsaw quickly has been recognised as a major tourist attraction. Today it has more than 200 shops, restaurants to potter around in. Moreover, when walking today through the Old Town narrow streets, it is hard to believe that practically most of the buildings are less than 60 years old.

The so-called “Decree on Municipalisation” announced by communists in October 1945 and concerning the ownership and use of land in Warsaw – cancelled private property rights to the land. In such a situation the “old” residences of the Old Town were given a communal apartment at the Praga District (located on the right bank of the Vistula River) and prestigious apartments at the Old Town were offered to the “specially selected” group of artists, scientists and high-ranked communist party members. It was not only about the unique location, but also the less restrictive area standard. The regulations at this time allowed, exclusively with regard to reconstructed historic buildings, occupying larger space and enjoy higher living standards. Contemporary residents of the Old Town (about 20 000, 7000 families) are representatives of the next generation. They are the children or even grandchildren of the first, post-war generation who used to inhabit the newly rebuilt district. Today this group of successors have only some tenantry rights (usually temporary) to occupy their apartment. Very rarely can one get a permission to buy an apartment from the state (or rather from local authority), many have few “strong” legal rights to the apartment s/he lives in except for the mere temporary “communal order.” The lucky ones enjoying full ownership rights often take a chance to sell their property on the free real estate market. The price for one square meter of apartments located at the Old Town is one of the highest in Warsaw (usually more than 4000 EURO/m<sup>2</sup>). It is necessary to emphasize that the standard price for living space in the Centre of Warsaw is about 2500 EURO/m<sup>2</sup>.<sup>9</sup> Most of the ground floor commercial spaces (shops, restaurants) are owned by local authority (self-government) and are being let through the open auctions. The prices are very high (as it is popular tourist space) and no local grocery with basic food offer is able to compete and make profit. It is out of question that the commercial space in the Old Town should be – and is – used mainly for luxury restaurants, cafes, art galleries, antique

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<sup>8</sup> <http://whc.unesco.org>.

<sup>9</sup> <http://www.domiporta.pl>.

and souvenirs shops with silver, gold and amber jewellery. Rarely the owners are locals: unfortunately the Warsaw City Council Office was not supportive of local small-scale entrepreneurs (as artists selling their paintings in the streets), but supportive of the development of “quality” tourism and services based on luxury shops and restaurants. We cannot call it “fair trade” schemes and, obviously, any future benefits from tourism and economic development should reach all sectors of local community.

Our interviews with various stakeholder groups’ representatives demonstrate that there is no one vision for sustainable tourism shared by local host community, conservatory office, local government and tourist industry. Regretfully, there are also differing levels of interests between individuals and groups within the local community, as the community is not homogeneous and not all local residents benefit equally from or are equally happy with tourism development. Moreover, we can observe individual and NGO’s networks (Association of Warsaw Friends, Association of Old Town Local Community) rather than institutional efforts to practice sustainable tourism at the Old Town in Warsaw. Unfortunately, the recent documents on the Old Town Management strategy such as the “Warsaw Strategy of Spatial Development” (2007) and the “Management of the Old Town Strategy” (2012) both rely on general ideas and objectives than on a concrete action plan.<sup>10</sup> This, therefore indicates a challenge in shaping other proposals for sustainable tourism planning recommendations. An important questions remain: how to make all stakeholders feel responsible to contribute in this process, and especially, how to involve the whole community in the tourism development? It seems that it is no other way to create a balance within the different interests groups than through the democratic process of making decisions (for example, through the Local Spatial Plan for the Old Town in Warsaw), as this system is giving equal weight to all legitimate voices. In 2010, one very promising step towards improvement of local self-government and democracy was the Warsaw City Council Office’s (WCCO) decision to start two interesting projects: “Contribute in Architectural Relics Conservation Programme” and “Old Town New Image.” Both projects were directed to local community members and intended as a new initiative to encourage people to express their opinions and to make them feel more responsible. What must be emphasized, in February 2010 the Warsaw

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<sup>10</sup> Warsaw Capital City Office (WCCO), *Warsaw...*; Warsaw Capital City Office (WCCO), *Management of the Old Town Strategy*, Warszawa 2012.

City Council Office (WCCO) initiated a series of consulting meetings with the local community, regarding the Old Town Spatial Management, the Project “Old Town New Image.” It was developed on the ground of the FSS’s Norway Grants’ Programme.<sup>11</sup> There were several meetings launched on September 30th and October 5th, 13th, 19th, and 26th, 2010 enabling local community members to meet and talk with the Warsaw City Council Office representatives. The local community members had a chance to express their feelings and comments concerning heritage tourism future development at the Old Town and the New Town area. Unfortunately, only 250 out of 20 000 inhabitants were present at least once, what makes hardly 1.5% of the total number of residents. Those interested in the project participation and present at the meetings mentioned several problems to be solved by the tourist development sustainable management plan. The necessity to shift public safety level (CCTV monitoring) and the sanitary issues (litters policy, provision of public toilets) were of primary importance. Later, other important questions concerning the organization of everyday life – parking places reserved for local residents, restaurants gardens blocking pavements, noise until the small hours – cropped up as well as those in regard of basic services (groceries, health services, transport) and the technical state of houses. The representative of disabled residents explained the necessity to secure a “barrier free” urban space, safer for the elderly, disabled and caretakers with prams thus indicating, that these improvements would be also important for disabled tourists visiting the site. The local community members highlighted that, in many cases, it is not possible to get the conservatory of monuments’ permission to create ramps or wider passages. One of the important issues brought out was the creation of a tourist information system (with suggestions to use the late prof. Jan Zachwatowicz’s ideas, including the “touch maps” system for people with sight impairments).

What must be underlined, we believe, is that, in the case of the Old Town in Warsaw, the sudden and sometimes uncontrolled development of tourism only highlighted the already existing inequalities and differences within the local community and its conflicts with the Warsaw City Council Office.

It must be stressed that most of the local community members were well aware of the many advantages connected with tourism development (e.g. the preservation of architectural relics and job creation). Despite the fact that

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<sup>11</sup> [www.eog.gov.pl](http://www.eog.gov.pl).

it was very difficult to measure exactly these effects (especially the intangible impacts as promoting a better knowledge and understanding of Polish culture, tradition and history), it was obvious for these people that the meaning of tourism for the city economy was undisputable (Figure 1). However, the local community of the Old Town in Warsaw perceived the sustainable tourism development and the heritage site management possible under several conditions (field studies material 2012–2014):

- their approach is generally not anti-growth, but the host community wants certain limitations to this growth, and tourism development must be managed within these limits,
- limits should be set with regard to the environment studies, and nature and heritage protection requirements,
- long-term as much as medium and short-term thinking about tourist development are necessary (for example, the horizon of: 1 year, 5 years and 20 years),
- concerns for the tourism sustainable management should be seen also in the economic and social perspective of the host community, via their needs and expectations,
- all the stakeholders (including the local community) need to be consulted and empowered in tourism development decision making, need to be informed about the Warsaw City Council Office's plans, projects and actions within the Old Town and in its neighbourhood,
- final decisions of the Warsaw City Council Office concerning the Old Town must balance the costs and benefits in the context of not the local community as a whole as it is not a homogeneous group: there are various individuals and groups which could gain or lose in the consequence of different official courses and actions.

### **3. Final Results and Conclusions**

When shaping our research aims we considered examining the complicated relationship between tourism sustainability and the local community of the Old Town in Warsaw the most important. There were complex interactions with the host community and the natural environment (Vistula River Valley), cultural heritage, the Warsaw Conservatory Office, the Warsaw City Council Office, and the commer-

cial sector of tourist services. Our research has shown that there are several unsolved questions related to the tourist sustainable development management in the Old Town. First, there are visible signs of the physical damage at historic properties: wear and tear, litter and pollution, vandalism. Secondly, massess of tourists (thronges of people filling the narrow streets) and their sometimes antisocial behaviour, or noise they make until the early hours are mentioned as the major disruptions of everyday life. These were listed by residents of the Old Town in Warsaw, both during our interviews (in 2012–2014) and during the meetings organized by the Warsaw City Council Office (in 2010–2011). Most of the locals mentioned the lack of shops with food and very high prices at few groceries which are today in the minority. The majority of 248 shops operating in the Old Town and the New Town are either the famous restaurants or fancy boutiques and souvenir shops targeting rich tourists and less interested in submitting their offer to permanent residents. Local community members also suffer not having access to the basic services such as public transport (the Old Town is traffic-free zone), or having only very poor health services.

Sadly, very active only a few years ago, the Association of the Old Town Residents (founded in 2000) can no longer contribute effectively as a respected partner to the shaping of the spatial policy as potentially it could, for most of its members have not legal rights to their apartments. Without a clear position they are treated only as temporary tenants of communal properties and hence a “weaker” partner for the Warsaw City Council Office (WCCO) and the Warsaw Central Borough Local Authority (to which the Old Town and the New Town are formally incorporated). We would like to draw attention to the fact, that, in consequence, this could be a reason both for such a poor involvement of the host community in the sustainable tourism management projects and the indifference as regards participating in any other action aimed at improving the local environment (for example, the Krasieński Park of the Warsaw Restoration Project in 2011).

It is clear that the further development of tourism at the Old Town and the New Town requires taking into account not only the stimulating economic development through tourism and conservatory programmes, but also the views and opinions of various other stakeholders (local community, interest groups representing restaurants and shops holders, tourist agencies). As each stakeholder group has a different set of needs and ideas on how to use the historic urban fabric, it is necessary to solve some potential conflicts and achieve a balance between these voices. Although this theory is not very popular in tourism planning, it seems that the effort to identify, legitimate and make people feel involved and responsible

should be the core of the sustainable tourism philosophy. However, scholars are right: the bottom-up approach alone cannot achieve sustainability, especially where control of the factors such as air and water pollution is necessary (possible only through top-down command) (Figure 1, Table 2).<sup>12</sup>

The example of not so successful project of the Warsaw City Council Office (WCCO) entitled “Old Town – New Image” (2010) showed that the Warsaw local community had not been ready to cooperate either with the self-government, or with government institutions. A mere 1.5% of local community members who so far have volunteered to contribute to the shaping of the sustainable heritage tourism strategy within the Old Town in Warsaw is not enough. If the goal of tourism management is minimizing the negative impact of tourism and protect the environmental and cultural heritage; to create tourist satisfaction and to stimulate economic growth; to provide improved living standards and environment quality for residents, than it is necessary to better understand the host community, its nature, scope and function as well as the political, economic and cultural tensions within the group. Understanding the way in which the community sees the problem solutions, the implications of their relations to tourists and tourists services should be a crucial basis to further the Warsaw City Council Office projects.

The sustainable site management requires to involve all stakeholders (that can affect or are affected by tourism) in the project, tourists visiting the site included. It seems that only through making “all of the groups” concerned with the sustainable tourism development we could successfully establish a more balanced and long-term effect in achieving goals. However, in order to obtain an equilibrium between the potential tourism growth, conservatory needs, and the quality of host community life, all stakeholders’ interests and objectives regarding the tourism development must be incorporated into the Local Planning process and well balanced. It could be a way both to protect the outstanding values of the Old Town in Warsaw and ensure that tourists will get a quality

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<sup>12</sup> C.M. Hall, *Tourism Planning*, Prentice Hall, Harlow 2000; M. Hanzi, *Information technology as a tool for public participation in urban planning: a review of experiments and potentials*, “Design Studies” 2007, Vol. 28, No. 3, pp. 289–307; Ch.M. Law, *Urban Tourism*, Continuum, London 2002; S. Page et al., *Managing Urban Tourism*, Prentice Hall Harlow 2003; A. Panasiuk, *Instrumenty zarządzania turystyką w regionie*, “Problemy Zarządzania” 2010, Vol. 8 (3/29), pp. 21–29; A. Pawlikowska-Piechotka, *Planowanie przestrzeni turystycznej*, Novae Res, Gdynia 2013; Y. Rydin et al., *Public participation and Local Environmental Planning: The collective action problem and the potential of social capital*, “Local Environment: The International Journal of Justice and Sustainability” 2010, Vol. 5, No. 2, pp. 153–169.

experience there and the local community will feel a sense of responsibility when contributing to planning sustainable tourism (Figure 1, Table 2).

All in all, we have no doubts that the present planning process should be revised and the more integrated approach to local planning applied as an attempt both to solve spatial conflicts and build higher tolerance between local community members and tourists when sharing the historic space. Although UNESCO and ICOMOS provide a comprehensive set of universal guidelines, it is recognised that each historical place (as having unique values) requires an individual approach and spatial planning process must not be too much standardised.<sup>13</sup> Therefore, our proposal for an integrated planning process for the Old Town in Warsaw has been aimed to address the unique features and specific nature of this site as well as find a satisfactory balance between conservation needs, heritage tourism development and the local community expectations (Figure 1, Table 1, Table 2).



Fig. 1. Sustainable heritage tourism – sustainability goals of the main stakeholder groups (proposal for: Old Town Warsaw).

Source: research survey AWF University Warsaw (Ministry of Science and Higher Education, Poland grant: ds-144 AWF Warsaw).

<sup>13</sup> United Nations Educational, Scientific and Cultural Organization, *UNESCO World Heritage and Sustainable Tourism Programme – Action Plan 2013–2015*, Paris 2011; United Nations Environment Programme, *Rio Declaration on Environment Development*, Rio de Janeiro 1992; United Nation Habitat, *The Declaration on Cities and Other Human Settlements in the New Millennium*, Nairobi 2001; United Nations Secretariat ENABLE, *Convention on the Rights of Persons with Disabilities*, New York 2006.

Table 1

Sustainable heritage tourism – proposals listed by the host community  
(the Old Town Warsaw)

Principles listed by the local community members as conditioning the sustainable tourism development
1. Limits application to the growth and tourism development must be managed within these limits
2. Limits of tourist development should be set with regard to the environment studies, and nature and heritage protection requirements
3. Implementation of long-term, medium and short-term site management plans concerning the tourist development is necessary (for example, the horizon of: 1 year, 5 years and 20 years)
4. Concerns of the tourism sustainable management should be seen through the economic and social perspective of a host community, their needs and expectations
5. All the stakeholders (including local community) need to be consulted and empowered in tourism development decision making as well as informed about the Warsaw City Council Office plans, projects and actions within the Old Town area and in its neighbourhood
6. Final decisions of the Warsaw City Council Office concerning the Old Town must balance the costs and benefits not in the context of the local community as a whole, as it is not a homogeneous group: there are various individuals and groups which could gain or lose as the consequence of different official courses and actions

Source: research survey, conducted at Joseph Pilsudski AWF University Warsaw (Ministry of Science and Higher Education, Poland grant: ds-144 AWF Warsaw).

Table 2

Sustainable heritage tourism – integrated planning process proposal  
(the Old Town Warsaw)

Phase	Integrated planning process	Outcomes
1	2	3
1	Goals, objectives and priorities identification	
	Establishing goals within the tourism development, local community expectations and conservation requirements; identifying issues and options; collecting and interpreting data	Clear statement of plan purpose
2	Shaping possible spatial planning scenarios	
	Examining trends in urban tourism (future development trends), identify conservation policy and philosophy (readiness for changes), determining local community goals; preparing draft plan and draft programmes for implementing the plan	Draft plan created – spatial strategy of development

1	2	3
3	Consultations	
	Presenting assumptions of the draft plan, identify community primary values, key issues and problems (through interviews and workshops), identifying potential areas of spatial conflicts (local community, travel agencies, government institutions and NGOs – main stakeholders of Old Town in Warsaw)	Statement of agreed vision of spatial policy for sustainable tourism development for Old Town
4	Creation of the Local Plan for the Old Town in Warsaw	
	Potential sustainable heritage tourism development, conservatory recommendations, solutions to spatial conflicts and constrains of shaping “tolerant space”, details of infrastructure support (technical, social, cultural, tourist services), programme for architectural relics protection and historic urban structure regeneration; evaluating potential impacts of plans and implementing programmes	Revise objectives and strategies Prioritised the programme of infrastructure and conservatory works for the Old Town in Warsaw
5	Implementation	
	Devise implementation mechanism – programme of work, organization issues, responsibilities, timelines; identifying changes to existing legislation	Implementation strategy
6	Consultation	
	Reviewing and adopting plan-implementing programmes	Concise Local Plan for the Old Town document outlining all prior stages 1 to 6
7	Reviewing and monitoring	
	Reviewing and monitoring implementation procedures	Periodic reports on implementation and further recommendations for the Old Town Local Plan amendments

Source: research survey, conducted at Joseph Pilsudski AWF University Warsaw (Ministry of Science and Higher Education, Poland grant: ds-144 AWF Warsaw).

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## INNOWACYJNE ZASADY KONSULTACJI SPOŁECZNYCH A ZRÓWNOWAŻONA TURYSTYKA MIEJSKA – STARE MIASTO W WARSZAWIE

### Streszczenie

Wielkie miasta są tradycyjnie popularnymi kierunkami wyjazdów turystycznych. Obecnie tłumnie odwiedzane w Europie: Berlin, Londyn, Paryż, Rzym; a w Polsce: Kraków, Trójmiasto, Warszawa, Wrocław – są dowodem na wciąż niesłabnące zainteresowanie turystów. Rosnąca powszechność turystyki miejskiej i w konsekwencji wzmożony ruch turystyczny w ich historycznych dzielnicach, z jednej strony powoduje liczne uciążliwości, a nawet dezorganizację życia codziennego mieszkańców, jednak równocześnie przyczynia się do ożywienia ekonomicznego, jest motorem rozwoju i cennym elementem promocji regionu.

Aby uniknąć lub minimalizować negatywne skutki tego zjawiska, a wzmacniać potencjalne korzyści – warto, aby władze miast były do takich sytuacji dobrze przygotowane z odpowiednim wyprzedzeniem, potrafiły wypracować racjonalne rozwiązania. Jest to szczególnie istotne na obszarach wrażliwych, o wysokich wartościach historycznych zespołów urbanistycznych (zabudowa staromiejska, cenne zabytki architektury i ich otoczenie). Dla osiągnięcia poszukiwanych zasad kompromisu pomiędzy grupami sprzecznych interesów, poza potrzebą honorowania rygorów ochrony konserwatorskiej,

uwzględnianiem potrzeb turystów i inwestorów – ważne jest poznanie opinii społeczności lokalnej i włączenie stałych mieszkańców do wszystkich etapów prac nad planami strategii rozwoju turystyki i racjonalnym gospodarowaniem przestrzenią miasta.

Przedmiotem naszych badań prowadzonych w latach 2010–2014 było poznanie, na przykładzie Starego Miasta w Warszawie, zasad organizacji konsultacji społecznych w czasie procesu ustalania kierunków przyszłej strategii rozwoju przestrzennego dzielnicy, w tym perspektyw zrównoważonego rozwoju turystyki kulturowej. Interesowało nas poznanie stanowiska władz miasta, inwestorów, przedstawicieli instytucji pozarządowych oraz nade wszystkim opinii samych mieszkańców dzielnicy na temat pożądanых zasad harmonijnego gospodarowania „przestrzenią wspólną.” Artykuł prezentuje założenia i wnioski końcowe z przeprowadzonych badań w ramach projektu ds.-144 na Akademii Wychowania Fizycznego Józefa Piłsudskiego w Warszawie (grant finansowany przez MNiSW).

**Słowa kluczowe:** historyczne miasta, turystyka zrównoważona, konsultacje społeczne

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**USING CONCEPTIONS OF KNOWLEDGE MANAGEMENT  
IN SELECTED TRAVEL AGENCIES  
IN THE TARNÓW SUB-REGION**

**Abstract**

Globalization of economy, technological development and increasing competition about limited resources make tangible values, including knowledge, the key factor in economic growth. These phenomena influence national economies, households and enterprises. As a result, an increasing group of business entities, including also tourism companies, use the concept of knowledge management. The aim of this thesis is to analyse knowledge management performed by selected travel agencies from Tarnowski Subregion. Two main research methods are used in the thesis: documentation research method and diagnostic survey method. Based on the documentation method and using data from the secondary sources, one has made an inventory of travel agencies located in Tarnowski Subregion. Then, based on the diagnostic survey method and by means of questionnaire technique a research has been carried out on use of knowledge management at 44 travel agencies. The surveyed owners or managers of travel agencies indicated financial resources, then human resources and tangible resources (knowledge, patents, know how) as the most important groups of resources. Knowledge management is the most popular concept of management used at the surveyed travel agencies. Using and acquiring knowledge are the processes most frequently realized within this method. The most often used knowledge management tools there are: intranet, document management systems and workflow systems. According to the respondents, knowledge

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resources and trust-based interpersonal relations are the most important areas of knowledge management at their enterprises. It seems that large significance of the issues discussed in the thesis makes reasonable to continue research on this subject area

**Keywords:** knowledge, management concept, tourism enterprises, travel agencies, Tarnowski Subregion

## **Introduction**

Globalization of economy, technological progress and growing competition for limited resources are causing non-material values, including **knowledge**, to become the key factor in the socio-economic growth and development nowadays. This has its implications in both the macro- and micro economic spheres. On the macro-scale, with reference to modern national economies, it is clearly visible that possibilities of extensive growth identified with increasing the amount of used resources are being exhausted. The transition to intensive growth linked to greater effectiveness of the possessed and used resources is not possible without investment in the intellectual capital, which – in consequence – should result in the accretion of knowledge. An excellent example of this phenomenon is the Polish national economy slowly exhausting its extensive potential and whose further growth will be dependent on the technological progress and increase in effectiveness. Unfortunately, decision-makers do not seem to perceive these hazards and take up too few actions aimed at expanding both the research and development sector and better cooperation between the world of science and economic practice.

A rise in the significance of knowledge can also be observed among micro-economic subjects. Members of a great part of households are expanding their competences nowadays, acquiring new knowledge and qualifications through participating in various forms of education and professional improvement. Only a constant rise in competences can offer a chance to effectively compete for jobs with other people. Knowledge is also incrementally becoming a vital resource of modern enterprises. It is more and more often acknowledged to be the fourth, following land, capital and work, production factor, without which it is impossible to generate new market value today. Therefore, the process of acquisition and suitable application of knowledge is increasingly gaining significance in companies, through e.g. the implementation of **knowledge management**. This idea

of management is used by a still expanding number of companies, also belonging to the fast-growing tourist market. One of the types of the tourist company where the problem area of knowledge management appears to be of particular importance is the travel agency. In fact, it is travel agencies which, to a large extent, co-decide about the growth of the whole tourist economy and possibilities of gaining economic profits resulting from development of tourism in reception areas.

Despite the fact that there exist a lot of works dealing with the use of the conception of knowledge management by companies of different branches of economy, there are few publications relating to tourist organizations, including travel agencies.<sup>1</sup> Moreover, the relevant studies conducted to date have not dealt with the problem of implementing knowledge management by economic subjects located in the area of Tarnów sub-region.

The **cognitive aim** of this work is assessing the degree of using knowledge management by travel agencies based in Tarnów sub-region. The work has also its **practical goal**, since it will allow indicating to people who are responsible for managing subjects of the tourist market the most important processes, instruments and areas of knowledge management whose implementation can contribute to an economic success of companies which they run or manage.

**The main thesis of the work:** travel agencies based in the area of Tarnów sub-region make use of knowledge management in their activity.

In order to verify the main thesis the following auxiliary theses have been proposed:

**Auxiliary thesis 1.** Non-material resources make one of the most important groups of resources of the travel agency under analysis.

**Auxiliary thesis 2.** The conception of knowledge management is sometimes used in the examined travel agencies solely in a fragmentary way.

In the present work, two main research methods: **documentation method** and **diagnostic survey method** are used. At the first stage of the examination, within the framework of the first of the above-mentioned methods, an analysis of materials coming from secondary sources has been carried out. These are the materials and data elaborated by the Chief Statistical Office, the Ministry

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<sup>1</sup> D. Puciato, *Wykorzystanie zarządzania wiedzą w wybranych przedsiębiorstwach turystycznych z województwa opolskiego*, "Folia Turistica" 2012, No. 26, pp. 163–182; D. Puciato, *Endogeniczne uwarunkowania metod i technik zarządzania wykorzystywanych w przedsiębiorstwach hotelowych z Wrocławia*, "Handel Wewnętrzny" 2013, No. 5, pp. 261–274.

of Sport and Tourism and the Institute of Tourism in Warsaw. As a result, an inventory of all the travel agencies based in the area of Tarnów sub-region has been completed. At the second stage of the studies based on the method of diagnostic survey, the questionnaire technique has been applied. The research tool is a survey questionnaire relating to selected areas of innovativeness of subjects dealing in the tourist market. The questionnaire consists of 20 open-ended questions, semi close-ended questions, close-ended questions and demographics questions. Prior to commencing the basic studies, the questionnaire was subjected to pilot research and all the errors found were eliminated. The survey's (basic) research was conducted with owners or managers of 44 travel agencies based in Tarnów sub-region between April and May 2013. The sub-region includes the following counties: Tarnów, Dąbrowa, Brzesko and the county capital of Tarnów. The results of the research were then subjected to statistical treatment, in which an analysis of the structure was carried out and presented in tables and diagrams.

In our work, we have presented the essence of the conception of knowledge management in modern enterprises, elaborated on the characteristics of travel agencies, and presented the results of survey research related to the use of knowledge management in travel agencies in Tarnów sub-region.

## 1. The essence of knowledge management

Knowledge is often associated with data and information, although there are fundamental differences between these terminological categories. Data means all single numbers, facts and notions of the source-related and unprocessed character. Information means processed data presented in the context being of interest to the receiver. On the other hand, knowledge means information enriched with experience, interpretation and reflections of the receiver. The most significant features of knowledge are the following: **dominance, inexhaustibility, simultaneousness and non-linearity**.<sup>2</sup> Knowledge occupies a dominant place amongst the other resources, and thus is of strategic significance to the functioning of each company. Its inexhaustibility manifests itself in that during passing knowledge

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<sup>2</sup> W. Grudzewski, I. Hejduk, *Zarządzanie wiedzą w organizacjach*, "E-mentor" 2005, No. 8; B. Kaczmarek, W. Walczak, *Zarządzanie wiedzą we współczesnych przedsiębiorstwach*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź 2009, pp. 134–156.

its supply does not decrease. Knowledge is also of simultaneous nature, since at the same time there are many people who can be using it in many places. The non-linearity of knowledge, in turn, is linked to the fact that there is no one-directional dependence between the amount of knowledge and the competitive potential of the company.

The process of knowledge management is connected with the optimal usage of intellectual resources of an enterprise, with the aim to maximize its value. An attempt at precise defining this management method causes a lot of difficulty, though, because – as K. Perechuda claims – the “management of knowledge is a very capacious notion covering basically everything, since knowledge means a thought, that is a non-material being, out of which – according to cosmogony – the Universe is born. Due to that, this notion should not be defined.”<sup>3</sup> Nevertheless, the literature features four basic meanings of knowledge management.<sup>4</sup>

1. **Functional** – including realization of individual functions of management and operational functions related to identifying, transferring, creating, storing, joining, or selecting knowledge. This is a process which concentrates on the resources of knowledge and processes associated – with knowledge through realization of the functions of planning, organizing, motivating and controlling, aiming to realize targets of the organization.
2. **Processual** – marks a conduct aiming at creating suitable environment which will make it possible to effectively realize operational functions, e.g. the implementation of organizational systems to optimize the main processes related to knowledge, climate, culture and organizational structure directing people to generating knowledge, sharing it and applying it in an appropriate way.
3. **Instrumental** – concerning the selection and application of legal, economic-financial, organizational or technological instruments which contribute to the course of main processes with the participation of knowledge on all the levels and areas of the organization.
4. **Institutional** – covering the system of workers’ posts and teams (the strategic and operational level of the organization, formal and informal organi-

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<sup>3</sup> K. Perechuda, *Dyfuzja wiedzy w przedsiębiorstwie sieciowym. Wizualizacja i kompozycja*, Wydawnictwo Akademii Ekonomicznej we Wrocławiu, Wrocław 2005, p. 7.

<sup>4</sup> B. Mięka, *Zadania organizacji w zakresie zarządzania wiedzą*, “E-mentor” 2006, No. 17.

zation) which realize the functions and tasks in the scope of organization's knowledge management.

The management of knowledge can also be differently patterned, with **the resource model**, **the Japanese model** and **the processual model** being dominant at the moment. The resource model of knowledge management advances knowledge as the most important resource of the enterprise found both in the company itself and in its environment. The condition behind the effectiveness of knowledge management here is co-existence of the five elements such as: acquisition of knowledge from the environment, implementation of innovations in the enterprise, experimenting, joint solving of problems and holding key skills (physical, technical and management systems, employees' competences, norms and values). The Japanese model relates to the repetitive cycle of four processes of knowledge conversion: internalization – changing explicit knowledge into tacit knowledge, socialization – changing tacit knowledge into tacit knowledge, externalization – changing tacit knowledge into explicit knowledge and combination – changing explicit knowledge into explicit knowledge. The approach to knowledge management in this model is based on the following principles: knowledge is not only a set of data and information, but also values, emotions and premonitions. Knowledge management also rest on the notion that each person in the company is engaged in creating knowledge, with managers of the medium level playing a particular role in this process. According to the process model, knowledge management makes it possible to create, popularize and use knowledge to realize targets of the organization. The process of knowledge management consists of three main phases: acquiring knowledge, sharing it and transforming knowledge into decisions.<sup>5</sup>

Table 1 presents the characteristics of the most vital processes involving knowledge in the organization, namely: **localizing**, **acquiring and developing knowledge**, **sharing knowledge**, **making use of knowledge** and **retaining knowledge**. The basis for the realization of the processes are the following: goals, people, technology, organizational structure and organizational culture. These dimensions form an area subject to operationalization in the form of detailed strategic, technological and personal actions.<sup>6</sup>

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<sup>5</sup> A. Sopińska, P. Wachowiak, *Modele zarządzania wiedzą w przedsiębiorstwie*, "E-mentor" 2006, No. 14.

<sup>6</sup> M. Morawski, *Przedsiębiorstwo zorientowane na wiedzę*, "E-mentor" 2006, No. 16.

Table 1

## The most significant processes involving knowledge

No.	Process involving knowledge	Characteristics of the process
1	Localizing knowledge	Defining external and internal sources of knowledge and making it possible for workers to localize it.
2	Acquiring knowledge	Making use of knowledge from external sources through: purchase of patents or licenses, employing external experts, taking over firms, purchasing counselling services.
3	Developing knowledge	Acquiring skills, creating new products, improving processes in order to change the acquired knowledge into concrete actions. Owing to this, competences of the organization and its employees rise.
4	Sharing knowledge	Making information and skills available in such a way that they could be of service to the whole organization.
5	Applying knowledge	Concentrating on effective using of knowledge and on overcoming such barriers as: routine, concern about positions, overrating one's own value, breaking unwritten rules, wrongly-oriented leadership.
6	Retaining knowledge	Preserving the acquired knowledge through selection, storing and updating data so as to prevent losing valuable knowledge.

Source: G. Probst, S. Raub, K. Romhardt, *Zarządzanie wiedzą w organizacji*, Oficyna Ekonomiczna, Kraków 2002, p. 40–46; K. Perechuda, M. Sobińska, *Scenariusze, dialogi i procesy zarządzania wiedzą*, Difin, Warszawa 2008, p. 130–139.

Implementing knowledge management in the organization can be realized by means of the methodology proposed by M. Żmigrodzki<sup>7</sup> according to which the undertaken actions are performed within several main areas (Figure 1).

<sup>7</sup> M. Żmigrodzki, *Metodyka zarządzania wiedzą*, "E-mentor" 2006, No. 13.

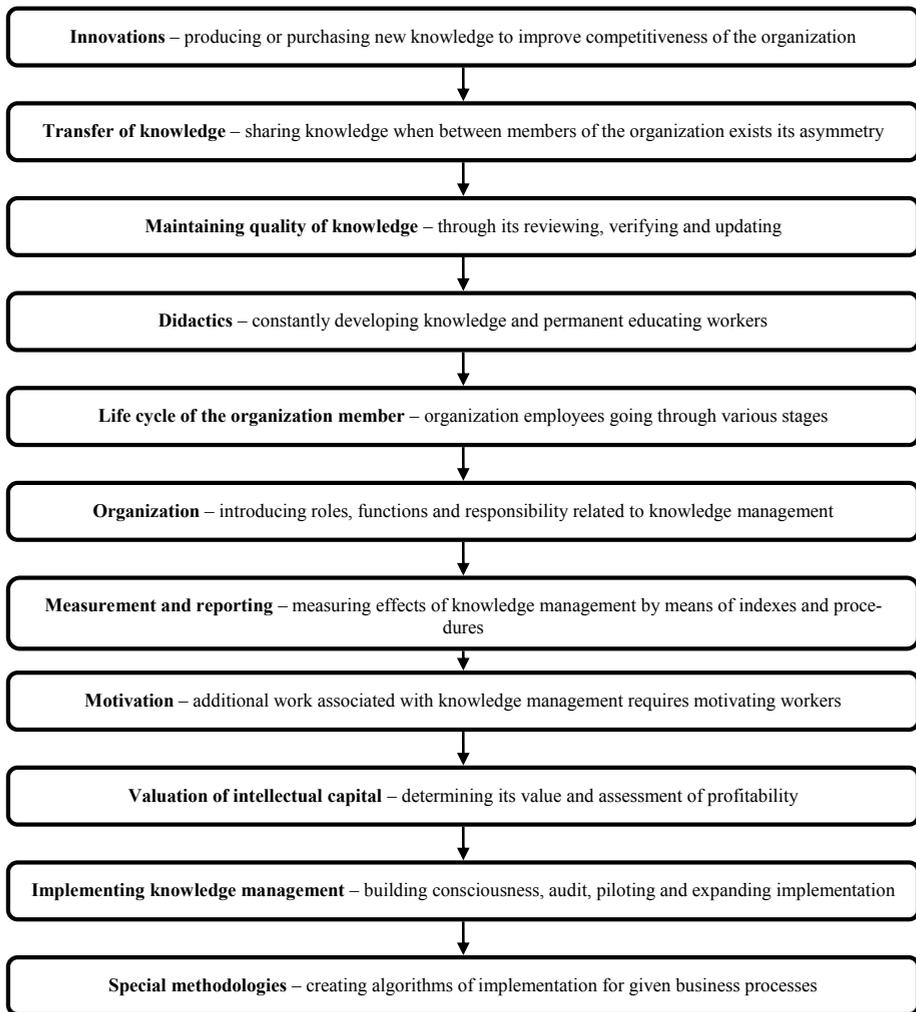


Fig. 1. Proposition of methodology of the knowledge management implementation in the organization

Source: M. Żmigrodzki, *Metodyka zarządzania wiedzą*, "E-mentor" 2006, No. 13.

In the process of knowledge management, various information technologies are often utilized, the most popular of which being:<sup>8</sup>

- a) **Business Intelligence** – systems serving to analyse quantitative data with the aim to make prognoses and facilitate making business decisions;
- b) **Systems of group work** – supporting the functioning of working groups through exchange of information and documents between workers;
- c) **Systems of work circulation** – serving to assign to workers individual tasks as well as to guarantee an even distribution of workload;
- d) **Systems of managing relations with customers** – coordinating relations between the company and its clients with the aid of the telephone call-center, managing the process of sale and providing post-sale services, coordination of servicing processes and analysis of customers' data;
- e) **Systems of managing documents and content** – with the aim to collect, render available and manage documents and their description;
- f) **Corporation portals** – Internet technologies securing access to information from different sources to workers and customers, which is adjusted to their needs;
- g) **Search mechanisms** – index sets of information and make searching for documents possible according to different criteria.

## 2. Travel agency as a subject of tourist economy

The tourist market can be considered within two frameworks: objective and subjective.<sup>9</sup> The former relates to the process of establishing the object and terms of purchase–sale transaction of tourist products, which is realized by subjects of the tourist market. The subjective framework treats the tourist market as a sum of subjects in the market, including: manufacturers of tourist products (tourist companies), purchasers of tourist products (individual or institutional customers), and also institutions and organizations which carry out tasks connected with the state's interventionism in the tourist economy (subjects

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<sup>8</sup> D. Jemielniak, A. Koźmiński, *Zarządzanie wiedzą*, Wydawnictwa Akademickie i Profesjonalne, Warszawa 2008, pp. 307–328.

<sup>9</sup> A. Panasiuk, *Ekonomika turystyki i rekreacji*, Wydawnictwo Naukowe PWN, Warszawa 2011, pp. 113–122.

of the tourist policy). Taking into account the added value, generated into the tourist economy and the place of services of organization and intermediation in the tourist chain of values, **travel agencies** make a very important group of tourist enterprises. They can be defined as a system composed of both material and non-material resources and processes which take place between individual resources, as well as inside these resources. The major or sole type of business activity within this system is rendering services related to organization of tourism or/and intermediation.

The **organizational service** consists in creating ready tourist products (events) from appropriately set and synchronized, as regards objective, spatial and temporal elements, partial services (the use of hotels, gastronomy, recreational and healthcare centers, transport, insurance, etc.). Creating this type of packages is the domain of business activity of **tour-operators**. The **intermediation service** is connected, on the other hand, with selling – by a tourist intermediary (an agent) – partial tourist services, or full tourist packages offered by the operator.<sup>10</sup> The characteristic features of the activity of tourism organizers and tourist agents are presented in Table 2.

Table 2

Characteristics of the activity of organizers and tourist agents

Type of travel agency	
Tour-operator	Tour agent
<ul style="list-style-type: none"> <li>– Purchases partial services from producers on their own behalf, on their own account and at their own risk,</li> <li>– Sells to the customer their own tourist product, bearing responsibility towards the latter for its proper execution,</li> <li>– Remuneration comes from the margin profit – price markup, which they pay to producers of partial services,</li> <li>– Prepares a tourist product for the anonymous customer or upon a concrete order from a purchaser</li> </ul>	<ul style="list-style-type: none"> <li>– Acts on behalf of a producer of partial services or a tour-operator,</li> <li>– Sells services of the subject for the benefit of which they act, does not bear responsibility towards the purchaser for proper performing services and does not take the risk of not selling a product,</li> <li>– Remuneration comes from commissions – the part of the retail price for the service which the principal resigns from in favor of the agent, in return for selling the product</li> </ul>

Source: A. Konieczna-Domańska, *Gospodarka turystyczna*, Oficyna Wydawnicza Szkoły Głównej Handlowej w Warszawie, Warszawa 2012, pp. 256–277; A. Konieczna-Domańska, *Biura podróży na rynku turystycznym*, Wydawnictwo Naukowe PWN, Warszawa 2008, pp. 24–30.

<sup>10</sup> A. Konieczna-Domańska, *Biura podróży na rynku turystycznym*, Wydawnictwo Naukowe PWN, Warszawa 2008, pp. 15–26; B. Meyer, *Obsługa ruchu turystycznego*, Wydawnictwo Naukowe PWN, Warszawa 2011, pp. 69–94; A. Panasiuk, *Gospodarka turystyczna*, Wydawnictwo Naukowe PWN, Warszawa 2008, pp. 142–145.

Travel agencies can be classified on the basis of various criteria, among which the most important appear to be the following: **direction of activity** and **product specialization**. Taking into account the former, travel agencies can be divided into **inbound** and **outbound**. Inbound agencies specialize in servicing exclusively domestic and foreign tourists arriving in the area of tourist reception in which the agencies are economically active. On the other hand, outbound agencies service domestic and overseas tours of inhabitants of the area where they run their business activity. According to the criterion of product specialization, travel agencies existing in the tourist market can be divided into ones specializing in, for instance, tourism geared towards the following: leisure, cognition, pilgrimage, qualified tourism, business or agro-tourism. Part of the subjects in the tourism organization and intermediation market also make use of other criteria of market segmentation, among which the most popular are as follows: age, height of income, or destinations preferred by tourists.<sup>11</sup>

Travel agencies, through realization of many important **functions relating primarily to satisfying tourists' needs and creating the size and structure of the tourist market demand**, are subjects making use of knowledge management seems particularly well-justified. Owing to travel agencies, a potential tourist can purchase tourist services distant in time and space, or else, full package services in one place. The tourist, while buying the product here and now i.e. at the time and place convenient to him/her limits the uncertainty and risk of not purchasing the desired services in the case he/she would not use the offer of a travel agency. Purchasing a global tourist package by a tourist at one seller results also in that the responsibility for a wrong performance of services is assumed by one economic subject. Filing claims with a few enterprises based in different places would be troublesome. It also needs mentioning that travel agencies, as institutional customers, hold a much stronger – in comparison with an individual client (a tourist) – bargaining power. Therefore, such agencies can obtain offers from producers of partial services – more attractive as regards price and quality – consequently limiting the risk of their low quality.<sup>12</sup>

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<sup>11</sup> E. Szymańska, *Biura podróży na rynku usług turystycznych*, Wydawnictwo Politechniki Białostockiej, Białystok 2009, pp. 14–34.

<sup>12</sup> D. Puciato, B. Goranczewski, A. Łoś, *Innowacje w biurach podróży*, "Ekonomika i Organizacja Przedsiębiorstwa" 2011, No. 7, pp. 15–23; K. Mrozowicz, D. Puciato, *Geneza i agonia organizacji. Studium atrofii pośredników turystycznych w świetle analizy strukturalnej rynku turystycznego Podkarpacia*, Zeszyty Naukowe Uniwersytetu Szczecińskiego, Ekonomiczne Problemy Turystyki No.18, Szczecin 2012, pp. 49–62.

Travel agencies also contribute to restricting **information asymmetry** which occurs between tourists and providers of partial services. Customers, getting acquainted with offers included in a brochure issued by the travel agency, acquire a possibility of comparing products of interest to them supplied by different providers of tourist services and selecting those which satisfy them most. Breaking the information asymmetry by subjects dealing in tourism organization and intermediacy is also connected with the fact that travel offices – apart from creating and distributing tourist products – render services of tourism-related counselling. Customers do not always need to realize what kind of product will be able to meet their needs in the best and most complex way. Informing, advising, or educating potential tourists by employees of travel agencies can consequently create new needs in purchasers, as a result of which the size and structure of the tourist demand will change. The demand is stimulated by marketing actions undertaken by travel offices and related to the realization both of modern marketing conceptions (e.g., **4P**) and innovatory ideas (e.g., **relational marketing**). The process of marketing management, both at the stage of market and marketing research and as already realized marketing strategies, is also strongly linked to non-material values, such as information and knowledge. This concerns chiefly such areas of travel offices' activity as: an analysis of needs and tourists' preferences, market segmentation, creating a tourist product, pricing, creating a system of discounts, building databases of customers, the research of customers' satisfaction and analysis of value.

### **3. Selected aspects of knowledge management in travel offices from Tarnów sub-region in the light of empirical studies**

Over half the examined travel agencies (52.27%) are companies dealing solely with tourist intermediation, 29.55% realize both intermediation services and organization of tourism at the same time, while 18.18% run exclusively the tour-operator's activity. The most popular legal-organizational forms within which the economic activity has been realized are individual ownership companies (43.18%) and civil partnerships (40.91%). Among the analyzed travel offices there are also joint-stock companies (9.09%), cooperatives, limited partnerships and limited liability companies. The largest group among the analyzed subjects comprise small businesses (50%) and micro-companies (36.36%). There are also subjects qualifying as medium-sized and large enterprises (6.82%). The highest

number of the analyzed companies of the organization of tourism and tourist intermediation are localized in a city with over 101 thousand inhabitants (38.64%), every fourth one (25%) is based in a city of less than 20 thousand inhabitants, 22.73% – in a city with the population ranging from 20 to 100 thousand inhabitants, while 13.64 run their activity in the country (Table 3).

Table 3

## Characteristics of the analyzed travel offices

Specification	Number	Percentage [%]
Type of realized activity		
Organization	8	18.18
Intermediation	23	52.27
Organization and intermediation	13	29.55
Total:	44	100.00
Legal organizational form		
Private ownership company	19	43.18
Cooperative	1	2.27
Civil partnership	18	40.91
Limited partnership	1	2.27
Limited liability company	1	2.27
Joint-stock company	4	9.09
Total:	44	100.00
Size		
Micro	16	36.36
Small	22	50.00
Medium-sized	3	6.82
Large	3	6.82
Total:	<b>44</b>	100.00
General location		
Country	6	13.64
City with less than 20 thousand inhabitants	11	25.00
City with the population ranging between 20 and 100 thousand inhabitants	10	22.73
City with the population ranging between 101 and 200 thousand inhabitants	17	38.64
Total:	44	100.00

Source: own elaboration.

For the surveyed owners and managers of travel agencies, the most important resources are the financial (52.27%) and human (50.00%) groups. Every third respondent (36.36%) has pointed to the non-material resources such as: knowledge, information, *know-how*, patents and licences. To every sixth examined one (13.64%) the most important are the traditional material resources (Figure 2).

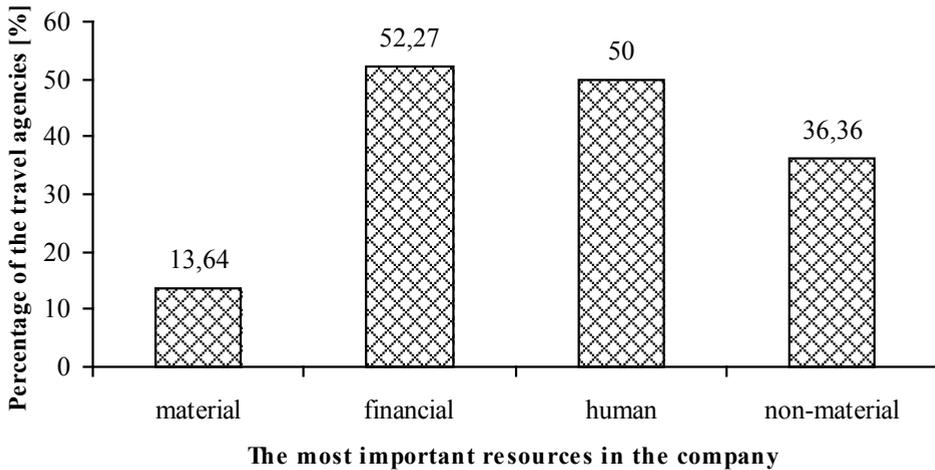


Fig. 2. The most important resources in the analyzed travel agencies

Source: own studies.

Among the conceptions, methods and techniques of managing the travel agency, the respondents have most frequently declared making use of the following: knowledge management (61.36%), management through targets (47.73%), management through effects (27.27%) and franchise (22.73%). On the other hand, the analyzed companies have used the following to a lesser extent: benchmarking (6.82%), outsourcing and lean management (2.27% each, respectively) (Figure 3).

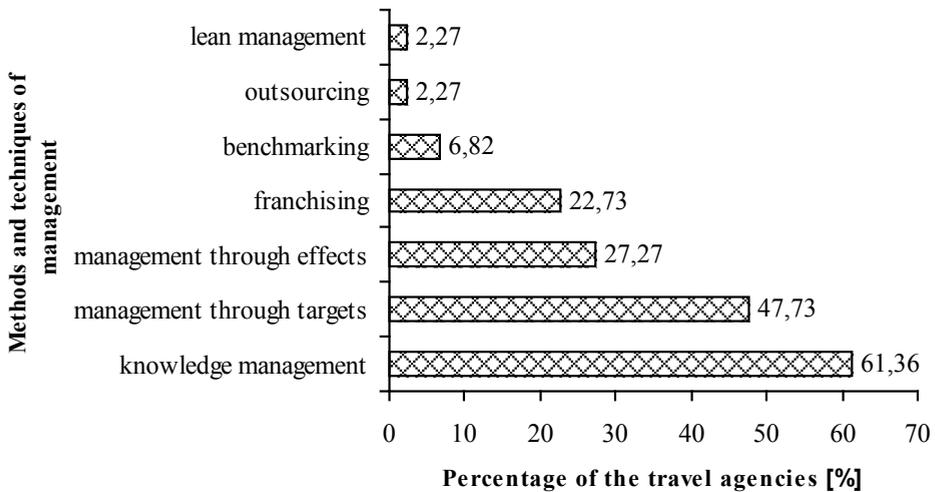


Fig. 3. Conceptions, methods and techniques of management made use of in the analyzed travel agencies

Source: own studies.

Among the travel agencies whose representatives declared making use of knowledge management, the most popular knowledge-using process has been its application (96.30%). This takes place primarily during creating new offers of tourist products, as well as during promotions and distribution. Almost 63% of the surveyed have indicated that they acquire knowledge from external sources, mainly as a result of the following: participation in trainings and courses, participation in tourist fairs, observation of leaders in the market, cooperation with other companies, getting acquainted with offers provided by their competitors, studying traditional or Internet-based brochures or participation in study tours. Representatives of every third examined travel office have also pointed to the development and sharing knowledge, chiefly through organizing trainings and internal workshops, making knowledge available on webpages and passing important information during meetings with co-workers. Every ninth surveyed subject locates knowledge inside and outside the organization, while one travel agency realizes the process of retaining of knowledge by creating and updating databases in the electronic form, mainly relating to products on offer, promotion and distribution, pricing, behavior of competitors in the market and cooperation partners (Figure 4).

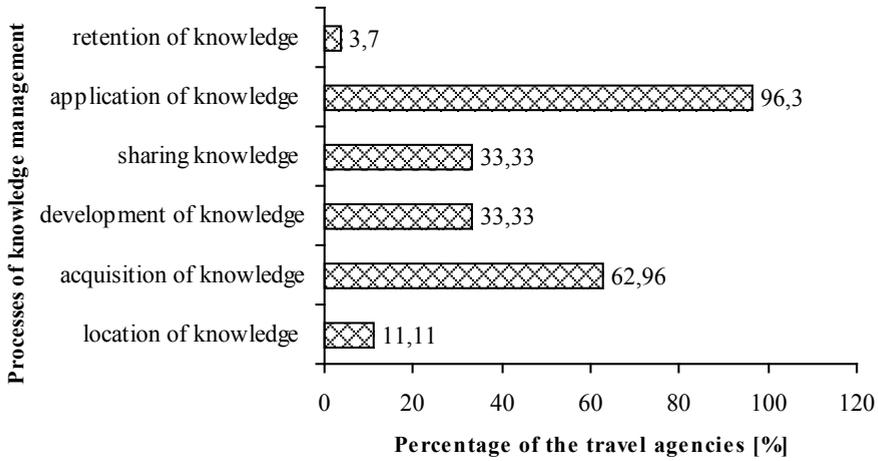


Fig. 4. Processes with the use of knowledge in the analyzed travel agencies  
Source: own studies.

The most popular tools of knowledge management in the analyzed offices are the following: the Internet (37.40%), systems of managing documents (33.33%), systems of work circulation (25.93), systems of group work support (25.93%) and data warehouses (18.25%). Three respondents have pointed to the decision support systems and one has indicated corporation portals (Figure 5).

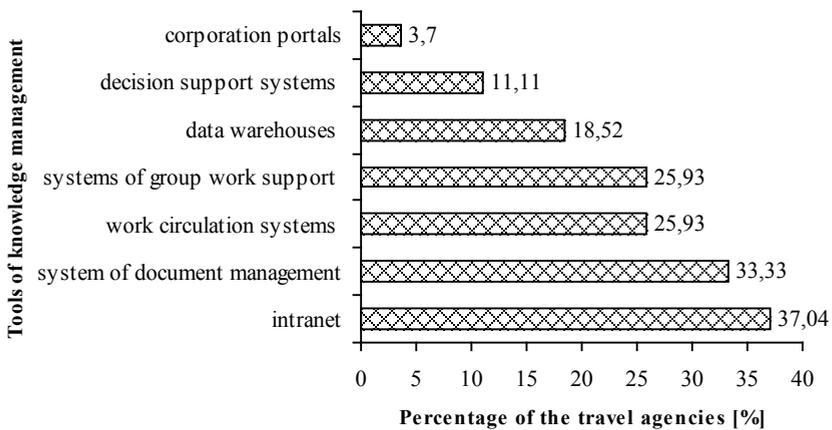


Fig. 5. Tools of knowledge management applied in the analyzed travel agencies  
Source: own studies.

The examined owners and managers of travel agencies have acknowledged the following to be the most significant areas of their companies' functioning, from the point of view of the knowledge management: resources of knowledge (55.56%), interpersonal relations based on trust (44.44%), information technologies and incentives motivating employees to use the method (29.63% each, respectively), the attitude on the part of managers towards knowledge management (25.93%) and also the very process of managing itself. Less than 15% of the respondents have pointed to the organization structure and 11.11% of the questioned – to organizational culture (Figure 6).

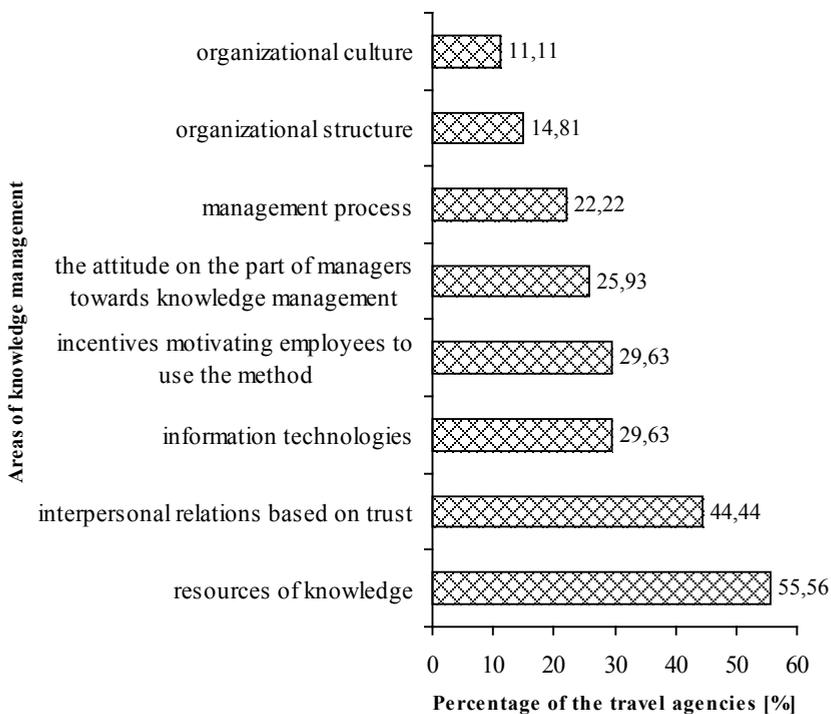


Fig. 6. The most significant areas of knowledge management in the analyzed travel agencies

Source: own studies.

Note: The majority of questions in the questionnaire offered the option of selecting more than one answer and therefore the sum of individual percentages may exceed 100.

## Conclusion

An analysis of the conducted research points to the fact that knowledge management is a popular conception of management applied by those responsible for running the travel agencies based in the area of Tarnów sub-region. The majority of the analyzed subjects, however, realize only the selected knowledge-related processes such as, primarily, acquisition and application of knowledge. This can attest to the state that part of the managers do not make use of the method of management in a complex manner or do it in a fragmentary way only. One confirmation of this hypothesis is the fact that the questioned owners and managers of travel agencies consider financial to be their most vital enterprise resources. This demonstrates, on the one hand, great importance of knowledge without which one is unable to manage a modern company today, while on the other hand making us aware of the necessity of popularizing knowledge management, first and foremost its methodology, among managers dealing in the tourist market. The realization of the full process of knowledge management could contribute to improving the economic-financial condition and, in consequence – to expanding the developmental prospects of the travel agencies under analysis.

The considerable cognitive and applicative significance of the problems raised in this article makes it only too justifiable to carry out further deepened studies with reference to the process of making use of knowledge management. Such research should be extended to cover also other types of tour companies, primarily hotel enterprises and subjects identified with tourist information as well as ought to take into account a greater number of subjects in the whole country.

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## WYKORZYSTANIE KONCEPCJI ZARZĄDZANIA WIEDZĄ W WYBRANYCH BIURACH PODRÓŻY Z PODREGIONU TARNOWSKIEGO

### Streszczenie

Globalizacja gospodarki, postęp technologiczny oraz rosnąca rywalizacja o ograniczone zasoby, sprawiają, że kluczowym czynnikiem wzrostu gospodarczego są obecnie wartości niematerialne, w tym wiedza. Zjawiska te mają swoje implikacje zarówno

dla gospodarek narodowych, jak i dla gospodarstw domowych oraz przedsiębiorstw. W konsekwencji coraz większa grupa przedsiębiorstw, w tym również firm turystycznych, wykorzystuje koncepcję zarządzania wiedzą. Celem pracy jest analiza wykorzystania zarządzania wiedzą przez wybrane biura podróży z podregionu tarnowskiego. W pracy wykorzystano dwie główne metody badawcze: metodę dokumentacyjną oraz metodę sondażu diagnostycznego. W ramach metody dokumentacyjnej, wykorzystując dane pochodzące ze źródeł wtórnych, dokonano inwentaryzacji biur podróży, zlokalizowanych w podregionie tarnowskim. Następnie na podstawie metody sondażu diagnostycznego, za pomocą techniki ankietowej przeprowadzono badania dotyczące wykorzystania zarządzania wiedzą w 44 biurach podróży. Najważniejszą grupą zasobów, dla ankietowanych właścicieli lub menedżerów biur podróży, były zasoby materialne, następnie ludzkie oraz niematerialne (wiedza, patenty, *know how*). Zarządzanie wiedzą było najpopularniejszą koncepcją zarządzania wykorzystywaną w badanych biurach podróży. W ramach tej koncepcji realizowano najczęściej procesy wykorzystania oraz pozyskiwania wiedzy. Najczęściej stosowanymi narzędziami zarządzania wiedzą były: intranet, systemy zarządzania dokumentami oraz systemy obiegu pracy. Zasoby wiedzy oraz oparte na zaufaniu stosunki interpersonalne, to natomiast zdaniem respondentów najważniejsze obszary zarządzania wiedzą w ich przedsiębiorstwach. Duże znaczenie poruszanych w pracy kwestii powoduje, że zasadne wydaje się być prowadzenie dalszych badań w tym obszarze tematycznym.

**Słowa kluczowe:** wiedza, koncepcje zarządzania, przedsiębiorstwa turystyczne, biura podróży, podregion tarnowski

## **REGIONAL ASPECTS OF TOURISM**



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## **THE INCOME FROM ACCOMMODATION AND FOOD SERVICES IN ECO-AGRITOURISTIC FARMS IN EASTERN POLAND**

### **Abstract**

The aim of the study was to assess the economic effects of the touristic activities in eco-agritouristic farms operating in the Eastern Poland as well as to determine the correlation between the accommodation and food services income value and the farms' leisure facilities base combined with the attractiveness of the recreational rural area. The study was conducted in 2010 in 50 farms located in the following provinces: Mazovia, Podkarpacie, Podlasie, Świętokrzyskie and Warmia-Mazovia. The source material was collected through the direct interview technique. The questionnaire form sent to farms' owners was used as the research tool. The data obtained in the study allow us to conclude that the gross margin generated by accommodation and food services in each farm amounted on average 70,997.36 PLN. The highest value was recorded in the Podkarpacie Province (137,485.56 PLN) and the Warmia-Mazovia Province (118,638.91 PLN), and the lowest in the Świętokrzyskie Province (19,686.21 PLN) and the Podlasie Province (21,946.37 PLN). The revenue per occupied room/bed (POR) ranged between 34.13 PLN and 76.71 PLN. Respectively, the revenue per available room/bed (PAR) ranged from 0.84 to 42.76 PLN. The value of gross margin was significantly correlated with the attractiveness of the recreational rural area and the farms' leisure facilities base. In contrast, the value of the PAR ratio was significantly correlated only with the farms' leisure facilities base. The correlation between these attributes was weak but still significantly positive. Among other attributes no significant correlations was proven.

**Keywords:** rural recreational space attractiveness indicator, based recreation, gross margin, POR, PAR

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## Introduction

Eco-agritourism is a branch of sustainable tourism. It is a new segment of rural tourism offered by certified farms that produce food by the use of environment-friendly methods. The farms meet their guests' expectations concerning environment-friendly life, agricultural production and wastes management better than others. This form of recreation is targeted at people having big environmental awareness and sensitive to the nature. Sociological studies conducted by Kamienicka<sup>1</sup> in the area of Nature 2000 have demonstrated that, as regards the preferred forms and conditions of rest, a great number of tourists checks whether the farm has an organic farming certificate and offers organic produce coming directly from producers. In addition, the research indicates that such requirements are set by better educated agritourists. In the opinion of Ziółkowski,<sup>2</sup> the tourist offer of environment-friendly farms is addressed to the specific market niche and often compensates for other inconveniences, such as the lack of outstanding tourist attractions, or simple accommodation conditions.

The agritourist product is a very intricate issue including, without limitation, many elements such as e.g. natural tourist advantages. Natural environment is one of the main advantages of agritourism and its quality, in the opinion of Sikorska-Wolak<sup>3</sup> and Wojciechowska<sup>4</sup> and Durydiwka,<sup>5</sup> is strictly correlated with tourism intensity. Little Poland, Podkarpacie, Pomerania, West Pomerania, Podlasie, Warmia–Mazovia are the main Polish provinces with a high potential

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<sup>1</sup> J. Kamienicka, *Świadomość ekologiczna turystów. Interpretacja wyników badania socjologicznego. Turyści a Natura 2000*, Publikacja Narodowego Funduszu Ochrony Środowiska i Gospodarki Wodnej, Warszawa 2012, pp. 16–17.

<sup>2</sup> B. Ziółkowski, *Rolnictwo ekologiczne a turystyka wiejska – próba modelowego ujęcia wzajemnych zależności*, "Journal of Research and Applications in Agricultural Engineering" 2006, Vol. 51 (2), pp. 224–229.

<sup>3</sup> I. Sikorska-Wolak, *Możliwości rozwoju i specyficzne cechy turystyki na obszarach prawnie chronionych w Polsce*, in: *Regionalny aspekt rozwoju turystyki*, ed. M. Jalinik, Wydawnictwo Politechniki Białostockiej, Białystok 2006, pp. 80–87.

<sup>4</sup> J. Wojciechowska, *Procesy i uwarunkowania rozwoju agroturystyki w Polsce*, Rozprawy habilitacyjne, Wydawnictwo Uniwersytetu Łódzkiego, Łódź 2009, p. 167.

<sup>5</sup> M. Durydiwka, *Tourist function in rural areas of Poland. Spatial diversity and changing trends*, "Miscellanea Geographica – Regional Studies on Development" 2013, Vol. 17, No. 3, pp. 5–11.

for the development of tourist functions, where tourism may be an important development factor.<sup>6</sup>

The main achievement of Polish agritourism, according to Wojciechowska<sup>7</sup>, is establishing the entities generating and forming its own development. To those entities we should include not only the agritouristic farm owners, but also associations, organizations and institutions supporting this development, such as agricultural advisory centers, communities and county bureaus. Also, tourists belong into this group, especially as their interest in the agritouristic product determines its development directions.

Agritourists also need their free time to be organized. Environmental education is a great attraction of the eco-agritourist farms. For that purpose, didactic natural paths are created within the farms or their surroundings.<sup>8</sup> They become interesting tourist routes and an alternative for or a supplement of other tourist facilities. Eco-agritourism operators should also take into account that a great part of the society is increasingly interested in active tourism associated with physical recreation. In order to meet this trend, it is necessary to prepare recreational and sports facilities within the farm and its surroundings. The most common forms of recreation in agritourism are cycling, hiking, horse riding, canoeing, horse cab or sleigh rides. To organize some innovative recreational and entertainment services, a farmer must be particularly involved, but this is a way to attract customers to the agritourist farm and stand out against the competition.<sup>9</sup> However, Sikora<sup>10</sup> points out that innovativeness in agritourism should be moderate not to spoil the rusticity.

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<sup>6</sup> J. Sikora, *Turystyka wiejska, w tym agroturystyka, w kontekście perspektyw rozwoju wsi i rolnictwa w Polsce. Analiza wyników badań empirycznych*, Ekonomiczne Problemy Turystyki No. 3 (27), Zeszyty Naukowe Uniwersytetu Szczecińskiego No. 807, Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, Szczecin 2014, pp. 113–126.

<sup>7</sup> J. Wojciechowska, *20 lat polskiej agroturystyki – o przeszłości i przyszłości*, “Turystyka” 2011, No. 21/1–2, pp. 67–73.

<sup>8</sup> J. Sikora, *Agroturystyka. Przedsiębiorczość na obszarach wiejskich*, C.H. Beck., Warszawa 2012, pp. 233–234.

<sup>9</sup> B. Sawicki, A.K. Mazurek-Kusiak, *Agroturystyka w teorii i praktyce*, Wydawnictwo Uniwersytetu Przyrodniczego w Lublinie, Lublin 2010, pp. 37–38.

<sup>10</sup> J. Sikora, *Innowacyjność w agroturystyce polskiej – teoria i praktyka*, in: *Innowacje w rozwoju turystyki*, ed. M. Jalinik, Wydawnictwo Politechniki Białostockiej, Białystok 2008, pp. 13–20.

Agritourism, as a non-agricultural activity carried out at farms, has mainly an economic aspect. Many studies on agritourism<sup>11</sup> indicate that farmers offer tourism services mainly to earn extra income. In addition, in accordance with multifunctional rural development strategies, agritourism is one of the developing symptoms of village and agriculture modernization.<sup>12</sup>

The purpose of the research has been both to evaluate the economic effects of tourist activities at the eco-agritourism farms operating in the Eastern Poland and find a relation between the income earned from accommodation and catering services, recreational facilities at farms, and the attractiveness of rural recreational space.

## 1. Material and methods

The research has been conducted at 50 eco-agritourism farms located in the following Eastern Poland provinces: Mazovia (7 farms), Podlasie (9 farms), Podkarpacie (10 farms), Świętokrzyskie (14 farms), and Warmia–Mazovia (10 farms). The area subject to the research (Eastern Poland) has been chosen on purpose. The farms are located in 41 municipalities. The list and location of farms has been obtained from the Regional Agricultural Consultancy Centers operating in particular provinces. These are mainly eco-agritourism farms operating in the above mentioned provinces in 2009. The research does not cover the Lublin Province since in the analyzed period there were no farms of the type in question recorded by the Consultancy Centre in Lublin. The research was conducted in 2010 and the information refers to 2009. The source material has been collected through direct interviews. A research tool is a questionnaire addressed to farm owners.

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<sup>11</sup> K. Łęczycki, R. Jabłonka, A. Marcysiak, *Motywy i uwarunkowania lokalizacyjne prowadzenia działalności agroturystycznej*, in: *Agroturystyka – moda czy potrzeba?*, Monografie No. 80, eds. G.A. Ciepiela, J. Sosnowski, Wydawnictwo Akademii Podlaskiej, Siedlce 2007, pp. 180–199; A. Niedziółka, *Ekonomiczna opłacalność prowadzenia usług agroturystycznych w województwie małopolski*, in: *Agroturystyka – moda czy potrzeba?...*, pp. 79–82; J. Żbikowski, A. Kozak, M. Kuźmicki, *Motywy podejmowania działalności agroturystycznej w wybranych gminach województwa lubelskiego*, in: *Marketing w agroturystyce*, Monografie No. 75, eds. M. Plichta, J. Sosnowski, Wydawnictwo Akademii Podlaskiej, Siedlce 2006, pp. 117–125.

<sup>12</sup> J. Sikora, A. Jęczmyk, *Agroturystyka przykładem przedsiębiorczości w wielofunkcyjnym rozwoju terenów wiejskich*, in: *Rola turystyki w strategii i polityce rozwoju gospodarki regionalnej*, Wydawnictwo Wyższej Szkoły Turystyki i Hotelarstwa, Gdańsk 2006, pp. 394–403.

The questions in the questionnaire refer to the surface area of tourist accommodation, recreational facilities, the type of catering services, the number of occupied rooms and catering services sold in the year, accommodation and catering prices, yearly expenses for farm advertisement and promotion, a unit price of water and sewage disposal, a unit price of wastes disposal, a price of 1 tonne of coal, including transport, food purchase prices, the cost of grain grinding, pig slaughtering and pork meat veterinary tests.

In addition, the data on the natural advantages of municipalities where the farms are located has been collected.

On the basis of the data, the following ratios have been calculated:

1. A rural recreational space ratio has been calculated for municipalities where the farms are located on the basis of an evaluation method described by Ciepiela and Sosnowski.<sup>13</sup> In this method, diagnostic properties described as stimulants and destimulants are identified. Then, depending on their percentage share in the general area of the administrative units, a relevant number of points is assigned to them. The top unit value is assigned to surface (flowing and standing) waters. The second key component of the environment comprises forests, meadows and grazing lands. This method also takes into account the relative altitude of the municipality (1 point for each 10 m of the relative altitude). A destimulating value has been assigned to urbanized areas, whose increasing share in the structure of an area reduces the usefulness of the natural environment for tourism purposes.

The ratio reflecting the attractiveness of the rural recreational area of the municipalities has been calculated in accordance with the following formula:

$$W_{wa} = \left( \sum_{j=1}^s s \right) \times \frac{100 - d}{100} + W_w$$

where:

$W_{wa}$  – the rural recreational area attractiveness ratio,

$s$  – the number of points assigned to the stimulant,

$d$  – the number of points assigned to the destimulant,

$j$  – a property for the  $j^{\text{th}}$  administrative unit (municipality),

$W_w$  – the number of points for the relative altitude.

<sup>13</sup> G.A. Ciepiela, J. Sosnowski, *Wpływ atrakcyjności wiejskiej przestrzeni rekreacyjnej na działalność gospodarstw rolnych regionu siedleckiego*, "Wieś i Rolnictwo" 2011, No. 1 (150), pp. 134–146.

The area of arable land (including orchards), meadows and grazing lands, forests and tree-covered areas, urbanized land and surface waters of particular municipalities is based on the statistical data obtained electronically from competent offices of the municipalities and districts.<sup>14</sup> While the relative altitude came from the website. An additional source of information was the Statistical Yearbook of Agriculture.<sup>15</sup>

2. The scoring of recreational facilities offered by the farms. This evaluation covers recreational facilities of the agritourism farms. The number of points for the categories as specified in Table 1 has been calculated on the basis of the cost of preparation which differs depending on the quality and price of materials and equipment used as well as the price of the related construction services. That is why, the average cost of the preparation of individual types of recreational facilities has been taken into account and calculated on the basis of price offers and cost estimates obtained from various companies selling recreational equipment and devices and constructing the recreational facilities. This method assumes 1 point for the facilities whose cost exceeds PLN 1000. The growth of costs by not more than PLN 1000 increases the number of points by 1. Therefore, the number of points for particular types of recreational facilities has been calculated by dividing the average preparation cost by 1000. The result has been rounded to the closest integer. The number of points that a farm may obtain for recreational horses and equipment (bicycles, quads, buggies, canoes, etc.) depends on the number of the facilities.
3. The yearly direct costs of tourist maintenance at the farm without food has been calculated as the product of the daily maintenance cost per tourist and the number of nights sold. The daily cost covers water (including sewage), electricity, bottled gas, cleaning agents, wastes disposal, the heating of the area used by tourists, and advertising expenses. It is very difficult to calculate the tourist maintenance cost of the agritourism farm because it is not possible to find out which part of the above cited costs is spent for agricultural activity and the maintenance of the farmer's family and which for the maintenance of tourists. Therefore, the calculation of costs related to tourist maintenance is based on the accounting documents kept

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<sup>14</sup> [www.wysokosc.mapa.info.pl](http://www.wysokosc.mapa.info.pl).

<sup>15</sup> *Rocznik Statystyczny Rolnictwa*, GUS, Warszawa 2010.

for the tourist facilities located in the village of Zabuze (Łosice District). Its activity is not identified with agriculture and its accommodation facilities are used only by tourists. On the basis of the 2009 invoices and the number of person-days (accommodation and board), the consumption of water supplied to the water system, the consumption of electricity used for lighting purposes, the operation of household goods and water heating, the cost of bottled gas used for cooking, the cost of cleaning agents and consumable articles, the quantity of wastes per tourist per day have been calculated. In the farms equipped with the gas pipeline, the daily cost of natural gas used for cooking and water heating per person has been taken into account (as based on the information obtained during direct interviews and the daily cost of natural gas used for cooking and water heating, the number of person-days, and the number of family members). The electricity unit price has been quoted after the Small Statistical Yearbook of Poland,<sup>16</sup> whereas the price of water (including sewage) and wastes disposal – from direct interviews. The cost incurred to heat the area used by tourists at the farms has been calculated on the basis of the actual surface area used for that purpose, as specified by farm owners during direct interviews. The yearly consumption of coal for the tourist area heating purposes has been calculated in accordance with Gradziuk's<sup>17</sup> method taking into account the consumption of hard coal to heat 1 square meter of the living area, as calculated by the author, while the price of one tonne of coal, including transport, has been obtained during the direct interviews. The heating cost is divided by the number of accommodation services sold by the farm. The cost incurred by farm owners for advertising purposes has been calculated in a similar way: yearly related expenses have been divided by the number of services sold. Direct tourist maintenance costs do not include: own work, credit interest, the depreciation of premises, furniture, household goods, kitchen tools, bed coverings, towels and tablecloths.

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<sup>16</sup> *Mały Rocznik Statystyczny Polski*, GUS, Warszawa 2010.

<sup>17</sup> P. Gradziuk, *Ekonomiczna analiza wykorzystania słomy na cele energetyczne*, in: *Słoma – energetyczne paliwo*, eds. A. Grzybek, P. Gradziuk, K. Kowalczyk, "Wieś Jutra" 2001, pp. 54–56.

Table 1

Number of points for each elements of recreational amenities base  
in the agritouristic farm

Ordinal number	Elements of recreational amenities base	Number of points
1	No recreational facilities	0
2	Garden house and furniture	10
3	Bonfire/grill place with equipment	3
4	Fireplace (fireplace room)	7
5	Playground for children (sandpit, swings, slide)	7
6	Multifunctional sports grass field	15
7	Tennis court (artificial surface) (sztuczna nawierzchnia)	80
9	Bowling alley (1 track)	65
8	Table tennis	2
9	Billiard table	7
10	Mini golf (10 holes)	30
11	Paintball (10 pieces)	10
12	Foosball	1
13	Darts	1
14	Buggy (off-road car) (1 pieces)	60
15	Bicycle (1 pieces)	1
16	Recreational horse (1 horse)	6
17	Canoe, boat (1 pieces)	2
18	Pedal boat (1 pieces)	5
19	Quad (1 pieces)	20
20	Horse cab, carriage (1 pieces) (1 szt.)	5
21	Sleigh (1 pieces)	3
22	Fish pond (200 m <sup>2</sup> )	12
23	Heated garden swimming pool (16m x 12m)	120
24	Finnish sauna for 7 persons	20
25	Jacuzzi for 7 persons	30
26	Shooting range (1 air rifle)	1
27	Fitness room (treadmill, multigym, bicycle, barbell, weights)	11

Source: author's elaboration.

- The direct cost of daily catering. To calculate catering costs, it has been assumed that tourists living at the agritourism farm should be fed with the produce of the farm or products bought at purchase prices from nearby agricultural producers. The tourist's daily demand for food at the agri-

tourism farm (milk, consumer grains, eggs, pork and poultry meat with bones, potatoes, vegetables and fruit) is quoted after Świetlikowska's<sup>18</sup> paper. The demand for pork and poultry has been translated into livestock on the basis of the slaughter value of pigs and poultry.<sup>19</sup> The daily consumption of the food produced outside the farm (sugar, oil, margarine, rice, yellow cheese, fish, coffee, tea) is calculated on the basis both of the 2009 invoices and the number of catering services provided at the tourist farm located in the village of Zabuze (Łosice District). Unit prices of the above articles are quoted after the Small Statistical Yearbook of Poland.<sup>20</sup> The purchase prices of food and the cost of grain grinding, pig slaughtering and pork veterinary tests have been obtained during the direct interviews.

5. Direct revenues are calculated as the product of the number of services sold in the year (accommodation + board) and the unit prices of the services.
6. Income from accommodation and catering services (measured as a direct surplus) is the difference between direct revenues and indirect costs.
7. A ratio reflecting the farm's income in comparison to the demand for services (POR, revenue per occupied room): income per room/bed sold in the period. The ratio was calculated as the quotient of the yearly income of the farm (measured as the direct surplus) and the number of occupied rooms sold by the farm in the year<sup>21</sup>.
8. A ratio reflecting the farm's income in comparison to the supply of services (PAR, revenue per available room): an income ratio per a room/bed available in the period. The ratio is calculated as the quotient of the yearly income of the farm (measured as the direct surplus) and the number of available rooms in the farm in the year (the farm's yearly service capacity: the number of places x 365 days).<sup>22</sup>

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<sup>18</sup> U. Świetlikowska, *Agroturystyka*, Wydawnictwo SGGW, Warszawa 2000, pp. 242–255.

<sup>19</sup> M. Osek, A. Milczarek, *Wynik tuczu, wartość rzeźna oraz jakość mięsa świń rasy puławskiej żywionych mieszankami z udziałem nasion bobiku i rzepaku*, "Roczniki Nauk Zootechnicznych" 2005, Vol. 32, f. 2, pp. 103–113; M. Osek, A. Janocha, A. Milczarek, B. Klocek, *Wyniki produkcyjne i poubojowe oraz walory smakowe mięsa kurcząt brojlerów żywionych mieszankami natłuszczanymi różnymi olejami roślinnymi*, "Rośliny Oleiste" 2005, Vol. XXVI/2, pp. 541–550.

<sup>20</sup> *Mały Rocznik Statystyczny Polski...*

<sup>21</sup> B. Lubas, *Układ hotelowego rachunku zysków i strat według Standardowego Systemu Rachunkowości Hotelowej (SSRH)*, [www.e-finanse.com](http://www.e-finanse.com).

<sup>22</sup> *Ibidem*.

9. A Pearson's correlation coefficient ( $r$ ) defining a relation between the value of the ratios. StatSoft, Inc. (2011). STATISTICA (data analysis software system), version 10.<sup>23</sup>

## 2. Results and discussion

### 2.1. Evaluation of the site in terms of the attractiveness of rural recreational area

Agritourism services are offered in the rural recreational area comprising the closer and farther surroundings of the farm and should allow rural tourism. This area is formed by the elements of the natural environment and the system of such elements is a determinant of the attractiveness of the area. To examine the attractiveness of the rural recreational area, the site, usually a municipality, is valorized.<sup>24</sup>

The site valorization based on the modified scoring system enables us to identify the attractiveness of the rural recreational space of the municipalities in a measurable way. The data presented in Table 2 indicate that the site where the eco-agritourism farms are located is very diversified in terms of its natural advantages. Municipalities located in the Podkarpacie and Świętokrzyskie Provinces are the most attractive because of landform features, highly scored in the method used. Based on the evaluation of the attractiveness of the rural recreational area, it may be also concluded that the share of surface waters in the region of Warmia and Mazovia does not determine the attractiveness of all the municipalities examined in the region. The ratio in some municipalities of the Warmia-Mazovia Province does not differ substantially from the one obtained for municipalities located in the Mazovia and Podlasie Provinces. It is also necessary to note that all the municipalities have a relatively high attractiveness ratio, which creates favourable conditions for rural tourism in the region.

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<sup>23</sup> [www.statsoft.com](http://www.statsoft.com).

<sup>24</sup> M. Drzewiecki M., *Agroturystyka w Polsce – stan obecny i tendencje rozwojowe*, in: *Uwarunkowania rozwoju turystyki związanej z obszarami wiejskimi*, eds. B. Sawicki, J. Bergier, Wydawnictwo Państwowej Wyższej Szkoły Zawodowej w Białej Podlaskiej, Międzyrzec Podlaski 2005, pp. 46–51.

Table 2

Rural recreational space attractiveness indicator value of communities,  
where analysed eco-agritouristic farms are located

Province	Community	Rural recreational space attractiveness indicator (points)
1	2	3
Mazovia	Cegłów	34.22
	Głowaczów	29.31
	Kadzidło	32.34
	Paprotnia	23.69
	Sanniki	28.97
	Stanisławów	28.05
	Żuromin	24.99
Podkarpacie	Baligród	68.81
	Bukowsko	65.66
	Cisna	80.76
	Dukla	56.55
	Lesko	84.90
	Leżajsk	36.50
	Olszanica	57.97
	Solina	76.68
Podlasie	Czarna Białostocka	39.28
	Dąbrowa Białostocka	24.85
	Hajnówka	38.34
	Narewka	38.01
	Piątnica	19.81
	Sokoły	24.00
	Sokółka	31.04
	Zabłudów	34.91
Świętokrzyskie	Bodzentyn	50.66
	Chęciny	38.65
	Łagów	46.45
	Nowa Słupia	44.68
	Radków	52.11
	Radoszyce	41.71
	Stopnica	37.11
	Złota	31.81

1	2	3
Warmia-Mazovia	Budry	27.66
	Ełk	38.13
	Grunwald	34.40
	Kruklanki	42.46
	Kurzężnik	24.00
	Młynary	25.17
	Mragowo	45.32
	Sorkowity	39.50
	Srokowo	27.02
	Świątajno	35.22

Source: author's research.

## 2.2. Recreational facilities in eco-agritourism farms

Recreational facilities at the farms are poor. These comprise mainly a bonfire and barbecue place, a resting place in the garden, and a playground (Table 3). Not all farms are prepared to offer active forms of rest identified with physical recreation. Only a half of the farms offer a sports field, while bicycles can be rented at 32 farms (64%), and water equipment – at 17 (34%). It is also vital to note that only a few farms are equipped with the expensive recreational and sports facilities such as buggies, quads or a fitness room.

Billiards, table tennis, table football or darts are also less popular. However, horses for recreation are held by 17 farms (34%). Enthusiasts of fishing have a great chance to display their skills and can go in for their hobby in the fish ponds owned by 21 farmers (44%).

The number of points given to the farms for their recreational facilities fluctuates from 20 to 129, but the scoring above 100 points has also been granted to a few farms (Table 4).

Table 3

## Recreational amenities base in eco-agritouristic farm

Specification	Province					Region	% farms
	Mazovia	Podkarpacie	Podlasie	Świętokrzyskie	Warmia- -Mazovia		
	Number of farms						
Garden house and furniture	7	10	9	12	10	48	96
Bonfire/grill place with equipment	7	10	9	14	10	50	100
Fireplace – fireplace room	4	3	3	5	5	20	40
Play ground for children: sandpit, swings, slide	6	7	7	10	8	38	76
Multifunctional sports grass field	4	4	4	6	7	25	50
Tennis court	1	1	0	2	2	6	12
Billiard table	0	0	0	0	1	1	2
Foosball	0	1	0	0	1	2	4
Darts	2	2	0	1	3	8	16
Bicycle	6	7	3	9	7	32	64
Recreational horse	2	4	4	3	4	17	34
Canoe, boat, pedal boat	1	2	4	1	9	17	34
Quad	1	0	0	0	1	2	4
Horse cab, carriage, sleigh sane	2	4	4	3	4	17	34
Fish pond	5	1	3	5	8	22	44
Fitness room	1	0	0	1	1	3	6

Source: author's research.

Table 4

Ranking of eco-agritouristic farms according to the number of points obtained for the recreational amenities base

Ranking	Number of farms	Province	Number of points	Ranking	Number of farms	Province	Number of points
1	G4	Mazovia	129	22	G2	Mazovia	43
2	G1	Warmia-Mazovia	110	22	G5	Mazovia	43
3	G6	Podlasie	109	23	G10	Świętokrzyskie	42
4	G3	Warmia-Mazovia	104	24	G12	Świętokrzyskie	40
4	G7	Mazovia	104	25	G6	Mazovia	39
5	G4	Warmia-Mazovia	93	25	G3	Świętokrzyskie	39
6	G1	Mazovia	91	26	G9	Podkarpacie	37
7	G2	Podlasie	87	26	G3	Podlasie	37
8	G6	Warmia-Mazovia	76	27	G1	Podlasie	35
8	G2	Warmia-Mazovia	76	27	G7	Świętokrzyskie	35
9	G8	Warmia-Mazovia	72	28	G3	Mazovia	32
10	G9	Warmia-Mazovia	64	28	G2	Świętokrzyskie	32
11	G8	Świętokrzyskie	61	29	G5	Świętokrzyskie	29
12	G1	Podkarpacie	60	29	G14	Świętokrzyskie	29
13	G5	Warmia-Mazovia	59	30	G9	Świętokrzyskie	28
14	G10	Warmia-Mazovia	55	31	G4	Świętokrzyskie	27
15	G4	Podkarpacie	54	32	G5	Podkarpacie	26
16	G13	Świętokrzyskie	52	32	G6	Podkarpacie	26
17	G7	Warmia-Mazovia	50	33	G3	Podkarpacie	24
18	G5	Podlasie	49	33	G8	Podkarpacie	24
18	G8	Podlasie	49	34	G10	Podkarpacie	22
19	G7	Podkarpacie	48	34	G4	Podlasie	22
19	G7	Podlasie	48	34	G6	Świętokrzyskie	22
20	G2	Podkarpacie	47	34	G11	Świętokrzyskie	22
21	G9	Podlasie	44	35	G1	Świętokrzyskie	20

Source: author's research.

The best equipped recreational facilities are offered by the farms located in the Warmia-Mazovia Province, where the average number of points per farm was 75.9. The Mazovia Province scores as the second best (68.7). The ranking of farms based on the number of points granted for recreational facilities (Table 4) indicates that farms specializing in horse and water recreation obtained the top scoring. The G4 farm from the Mazovia Province has obtained 129 points and gained the first place. It is worth noting that the farm has 13 horses and provides horse recreation. A similar situation has been recorded at the G1 and G3 farms from the Warmia-Mazovian Province occupying the second and fourth place in the ranking respectively. It is also worth pointing out that the top ten include the seven farms from the Warmia-Mazovia Province, while the last ten places are occupied by farms from the Świętokrzyskie and Podkarpacie Provinces, which have received from 20 to 37 points.

### **2.3. Income from accommodation and catering services at eco-agritourism farms**

The financial analysis of tourist activities at the agritourism farms concerns many issues and is a complicated tool subject to advanced book-keeping. The farms usually do not keep such advanced books, therefore our studies are limited to the calculation of direct costs and revenues related to accommodation and catering for tourists at the analyzed eco-agritourism farms in 2009. On the basis of revenues and costs, we have calculated the direct surplus allowing for the measurable evaluation of financial benefits earned by the farm from tourism.

The yearly direct cost per tourist at the farms has been determined by the number of service units sold and the daily cost of food and tourist maintenance. The data presented in Table 5 indicates that the number of the service units sold by the farms is very diversified and fluctuates from 45 to 5495. The biggest number of service units has been sold by the farms in the Podkarpacie and Warmia-Mazovia Provinces. Tourists were much less interested in the eco-agrotourism in the Świętokrzyskie and Podlasie Provinces.

Expenses incurred for the advertisement and rooms used for tourist purposes have a significant impact on the daily tourist maintenance cost (without food). Therefore, in each of the provinces in question there are farmers who

provide fewer services in comparison to the others but allocate a bigger surface for tourists and a bigger amount for advertising purposes and their yearly tourist maintenance cost is bigger.

Table 5

Cost, revenue and surplus resulted from the accommodation and full-day food services for tourists in eco-agritouristic farms

Province	Number of farms	Number of delivered service (accommodation and food service)*	Annual direct services cost (PLN)	Service price (accommodation and food service) (PLN)	Annual direct services revenue (PLN)	Annual direct services surplus (PLN)
1	2	3	4	5	6	7
Mazovia	G1	1870	29355.26	85	158950	129594.74
	G2	678	12087.38	85	57630	45542.62
	G3	695	11563.41	80	55600	44036.59
	G4	1030	18239.24	83	85490	67250.76
	G5	1760	29159.68	85	149600	120440.32
	G6	743	13090.17	70	52010	38919.83
	G7	1109	19006.04	80	88720	69713.96
Mean		1126.43	18928.74	81.14	92571.43	73642.69
Podkarpackie	G1	5495	73017.56	90	494550	421532.44
	G2	4352	57785.86	85	369920	312134.14
	G3	2120	31986.56	80	169600	137613.44
	G4	3952	58837.38	85	335920	277082.62
	G5	315	5596.92	75	23625	18028.08
	G6	641	11357.24	90	57690	46332.76
	G7	899	13851.79	70	62930	49078.21
	G8	549	9381.31	75	41175	31793.69
	G9	1218	17402.78	65	79170	61767.22
	G10	317	5867.04	80	25360	19492.96
Mean		1985.80	28508.44	79.50	165994.00	137485.56
Podlasie	G1	400	7007.20	90	36000	28992.80
	G2	100	2160.80	80	8000	5839.20
	G3	180	6440.04	75	13500	7059.96
	G4	140	2605.12	80	11200	8594.88
	G5	1095	17408.31	60	65700	48291.69
	G6	360	7400.88	75	27000	19599.12
	G7	1500	24342.00	60	90000	65658.00
	G8	190	5264.52	80	15200	9935.48
	G9	90	2753.82	70	6300	3546.18
Mean		450.56	8375.85	74.44	30322.22	21946.37

1	2	3	4	5	6	7
Świętokrzyskie	G1	550	8067.40	70	38500	30432.60
	G2	1494	24020.53	75	112050	88029.47
	G3	560	9647.68	75	42000	32352.32
	G4	45	1450.71	85	3825	2374.29
	G5	630	12497.94	75	47250	34752.06
	G6	160	2943.68	75	12000	9056.32
	G7	105	2568.09	65	6825	4256.91
	G8	900	14281.20	50	45000	30718.80
	G9	150	4603.20	65	9750	5146.80
	G10	45	1450.71	80	3600	2149.29
	G11	60	1667.88	90	5400	3732.12
	G12	70	2079.56	90	6300	4220.44
	G13	180	5603.04	85	15300	9696.96
	G14	330	6061.44	75	24750	18688.56
Mean		377.07	6924.50	75.36	26610.71	19686.21
Warmia-Mazovia	G1	2475	39892.05	75	185625	145732.95
	G2	2850	43228.80	70	199500	156271.20
	G3	1540	24760.12	65	100100	75339.88
	G4	1520	24803.36	80	121600	96796.64
	G5	1113	17672.21	70	77910	60237.79
	G6	3212	48205.70	80	256960	208754.30
	G7	900	14479.20	85	76500	62020.80
	G8	4000	62592.00	75	300000	237408.00
	G9	1380	26990.04	90	124200	97209.96
	G10	800	13382.40	75	60000	46617.60
Mean		1979.00	31600.59	76.50	150239.50	118638.91
Eastern Poland	Mean	1137.34	18118.35	77.06	89115.70	70997.36

\* The number of delivered full-day food service is equal to the number of the delivered accommodation services

The cost of full-day food service for one tourist – 1 person/day – amounts to 6.41 (PLN).

The economic analysis of the tourist activity of the farms

Source: author's research.

The prices of accommodation and board per tourist at the farms differ. However, an average price of the services in individual provinces does not differ significantly (Table 5). The direct revenue from accommodation and daily

board is from PLN 3,600 to PLN 494,550, and amounts to PLN 89,115.7 per farm on the average, while the yearly direct surplus is from PLN 2,149.29 to PLN 421,532.44 (Table 5), while an average per farm oscillates around the amount of PLN 70,997.36, although it is the biggest in the Podkarpacie Province (PLN 137,485.56) and the Warmia–Mazovia (PLN 118,638.91) Province, and the smallest – in the Świętokrzyskie Province (PLN 196,86.21). Comparing the data obtained herein with the data coming from the agritourist farms of the region of Siedlce in the years 2006–2007<sup>25</sup>, it must be noted that an average income generated by tourism in the eco-agritourism farms has been over 10-times bigger. In addition, the farms whose income (direct surplus) from tourist services is from PLN 208,754 to PLN 421,532 constitute 10%, while the farms with the income from PLN 60,000 to PLN 100,000 constitute 20% of the population. However, the group also includes both the farms (12%) whose income from agritourism activities does not exceed PLN 5,000 and farms making the income of PLN 5,000 – PLN 10,000 constitute 14%.

Economic effects in the hotel industry are commonly described with the use of POR (income per occupied room) and PAR (income per available room in the defined period) indicate that income (measured as the direct surplus) per occupied room is from PLN 34.13 to PLN 76.71 (Table 6). The biggest income has been earned by farms whose offer is targeted at one group of tourists (primary school students) and enriched with elements of environmental education and handicraft workshops. Services offered under the so-called “Residential School Trips” are very popular. The biggest income per available room (PAR) has been recorded by the G2 farm (PLN 42.76 ) in the Podkarpacie Province (Table 7), while the G10 farm in the Świętokrzyskie Province is at the last place in the PAR ranking as the PAR coefficient there is the smallest (1.76 %).<sup>26</sup>

<sup>25</sup> G.A. Ciepiela, J. Sosnowski, *Efekty ekonomiczne działalności turystycznej w gospodarstwach agroturystycznych*, “Zagadnienia Ekonomiki Rolnej” 2012, No. 2 (331), pp. 131–149.

<sup>26</sup> G.A. Ciepiela, A. Balińska, *Usługi turystyczne w gospodarstwach ekoagroturystycznych położonych w regionie Polski Wschodniej*, in: *Przedsiębiorczość w turystyce*, eds. S.J. Starski, M. Jalinik, Wydawnictwo Eko. Pres, Białystok, 2014, pp. 261–277.

Table 6

Revenue (direct surplus) generated from accommodation services and full-day food service in the eco-agritouristic farm compared to the service demand (POR)

Ranking	Number of farms	Province	POR (PLN)	Ranking	Number of farms	Province	POR (PLN)
1	G1	Podkarpacie	76.71	26	G8	Podkarpacie	57.91
2	G1	Podlasie	72.48	27	G3	Świętokrzyskie	57.77
3	G6	Podkarpacie	72.28	28	G5	Podkarpacie	57.23
4	G2	Podkarpacie	71.72	29	G14	Świętokrzyskie	56.63
5	G9	Warmia-Mazovia	70.44	30	G6	Świętokrzyskie	56.60
6	G4	Podkarpacie	70.11	31	G1	Świętokrzyskie	55.33
7	G1	Mazovia	69.30	32	G5	Świętokrzyskie	55.16
8	G7	Warmia-Mazovia	68.91	33	G2	Warmia-Mazovia	54.83
9	G5	Mazovia	68.43	34	G7	Podkarpacie	54.59
10	G2	Mazovia	67.17	35	G6	Podlasie	54.44
11	G4	Mazovia	65.29	36	G5	Warmia-Mazovia	54.12
12	G6	Warmia-Mazovia	64.99	37	G13	Świętokrzyskie	53.87
13	G3	Podkarpacie	64.91	38	G4	Świętokrzyskie	52.76
14	G4	Warmia-Mazovia	63.68	39	G6	Mazovia	52.38
15	G3	Mazovia	63.36	40	G1	Podlasie	52.29
16	G7	Mazovia	62.86	41	G9	Podkarpacie	50.71
17	G11	Świętokrzyskie	62.20	42	G3	Warmia-Mazovia	48.92
18	G10	Podkarpacie	61.49	43	G10	Świętokrzyskie	47.76
19	G4	Podlasie	61.39	44	G5	Podlasie	44.10
20	G12	Świętokrzyskie	60.29	45	G7	Podlasie	43.77
21	G8	Warmia-Mazovia	59.35	46	G7	Świętokrzyskie	40.54
22	G2	Świętokrzyskie	58.92	47	G9	Podlasie	39.40
23	G1	Warmia-Mazovia	58.88	48	G3	Podlasie	39.22
24	G2	Podlasie	58.39	49	G9	Świętokrzyskie	34.31
25	G10	Warmia-Mazovia	58.27	50	G8	Świętokrzyskie	34.13

Source: author's research.

Table 7

Revenue (direct surplus) generated from accommodation services and full-day food service in the eco-agritouristic farm compared to the service supply (PAR)

Ranking	Number of farms	Province	PAR (PLN)	Ranking	Number of farms	Province	PAR (PLN)
1	G2	Podkarpacie	42.76	26	G7	Podkarpacie	14.94
2	G7	Warmia-Mazovia	42.48	27	G7	Mazovia	14.69
3	G1	Podlasie	39.72	28	G9	Podkarpacie	14.10
4	G2	Warmia-Mazovia	38.92	29	G1	Świętokrzyskie	13.90
5	G4	Podkarpacie	37.96	30	G5	Podlasie	11.03
6	G6	Warmia-Mazovia	35.75	31	G8	Podkarpacie	8.71
7	G1	Podkarpacie	33.97	32	G3	Świętokrzyskie	8.06
8	G8	Warmia-Mazovia	32.97	33	G10	Podkarpacie	7.63
9	G4	Mazovia	30.71	34	G14	Świętokrzyskie	7.31
10	G3	Mazovia	30.16	35	G5	Podkarpacie	6.17
11	G1	Mazovia	29.59	36	G8	Świętokrzyskie	5.26
12	G5	Mazovia	27.50	37	G4	Podlasie	4.71
13	G9	Warmia-Mazovia	26.63	38	G8	Podlasie	4.54
14	G1	Warmia-Mazovia	26.62	39	G6	Podlasie	4.47
15	G10	Warmia-Mazovia	25.54	40	G6	Świętokrzyskie	4.14
16	G3	Podkarpacie	25.13	41	G13	Świętokrzyskie	2.95
17	G7	Podlasie	22.49	42	G3	Podlasie	2.42
18	G4	Warmia-Mazovia	22.10	43	G9	Podlasie	1.62
19	G2	Mazovia	17.82	44	G2	Podlasie	1.60
20	G6	Mazovia	17.77	45	G11	Świętokrzyskie	1.46
21	G2	Świętokrzyskie	16.08	46	G12	Świętokrzyskie	1.45
22	G3	Warmia-Mazovia	15.88	47	G4	Świętokrzyskie	1.08
23	G6	Podkarpacie	15.87	48	G9	Świętokrzyskie	1.01
24	G5	Świętokrzyskie	15.87	49	G7	Świętokrzyskie	0.97
25	G5	Warmia-Mazovia	15.00	50	G10	Świętokrzyskie	0.84

Source: author's research.

The examination of the relationships between the ratio reflecting the attractiveness of rural recreational areas and the number of points obtained for recreational facilities by the farm as well as POR and PAR coefficients and the direct surplus based on the correlation coefficient have indicated that the direct surplus is strictly correlated with the attractiveness of the rural area and recreational facilities. On the other hand, the income per available room has been substantially influenced only by recreational facilities (Table 8). It must also be emphasized that the relationship between these features is poor, but highly positive. No material relationships between other features have been demonstrated.

Table 8

Correlation coefficients

Tested trait	Mean	Standard deviation	Maximum value	Minimum value	Rural recreational space attractiveness indicator	Number of points for recreational amenities base	Direct surplus	POR indicator value	PAR indicator value
					Correlation coefficients (r)				
Rural recreational space attractiveness indicator	41.78	15.61	84.90	19.81	-	-	0.19*	0.12	0.01
Number of points for recreational amenities base	51.32	27.40	129.00	20.00	-	-	0.29*	0.11	0.32*
Direct surplus	77997.35	87535.64	421532.40	2149.29	0.19*	0.29*			
POR indicator value	57.61	10.02	76.71	34.13	0.12	0.11		-	-
PAR indicator value	16.61	13.04	42.76	0.84	0.01	0.32*		-	-

\*statistically significant coefficient

Source: author's research.

## **Conclusion**

On the basis of the research we may conclude that the eco-agritourism in the Eastern Poland in 2009 was very uncommon. Then, the eco-agritourism farms constituted 1.9% of all agritourism farms operating in the six provinces (Lubline, Mazovia, Podkarpacie, Podlasie, Świętokrzyskie and Warmia-Mazovia). Also, in the period in question the farms constituted 0.52% of the total number of environment-friendly farms operating in the region.

The site valorization based on the modified scoring number has indicated that the region where the eco-agritourism farms are located is highly diversified in terms of natural advantages. The municipalities with the most attractive landform features are located in the Podkarpacie and Świętokrzyskie Provinces.

Recreational facilities offered the farms are usually poor. They mainly include a bonfire and barbecue place, a resting place in the garden and a playground for children. Only few farms have been equipped with more expensive facilities, such as buggies, quads or a fitness room. Horses for recreation are maintained by 34% farms.

The best recreational facilities are offered by the farms in the Warmia-Mazovia Province and the Mazovia Province. The ranking of farms based on the number of points granted for recreational facilities indicates that the farms specializing in horse and water recreation have been evaluated at the top places.

All the farms provide full board for tourists. Accommodation and board prices differ. The biggest price (on the average per farm) has been recorded in the Mazovia Province and the smallest – in the Podlasie Province; however, the difference is small (PLN 6.70).

Income from accommodation and catering services in the eco-agritourism farms, measured as the direct surplus, is highly diversified and oscillates between PLN 2,149.29 and PLN 421,532.44, and average income per farm is PLN 70,997.36. The biggest income (on the average per farm) has been earned in the Podkarpacie (PLN 137,485.56) and Warmia-Mazovia (PLN 118,638.91) Provinces, and the smallest income has been recorded in the Świętokrzyskie Province (PLN 19,686.21). The farms whose income from tourist services fluctuate from PLN 208,754 to PLN 421,532 constitute 10%, and the farms whose income is from PLN 60,000 to PLN 100,000 constitute 20% of the population. However, the group also includes the farms (12%) whose income from agritourism does not exceed PLN 5,000 and the farms which earn the income of PLN 5,000 to PLN 10,000 constitute 14%.

The income analysis based on the demand and supply of services has indicated that the income per occupied room (POR) was from PLN 34.13 to PLN 76.71. The biggest income per occupied room has been earned by the farms whose offer is targeted at one group (primary school students) and enriched with elements of environmental education and handicraft workshops. Services provided under the so-called “Residential School Trips” are very popular. Still, the biggest income per available room (PAR) has been earned by one farm in the Podkarpacie Province (PLN 42.76 ). The smallest income per available room has been recorded by a farm in the Świętokrzyskie Province.

The direct surplus is strictly correlated with the attractiveness of the rural area and recreational facilities of the farm. Yet, the income per available room has been substantially influenced only by the quality of recreational facilities (PAR). It must be also noted that the relationship between these features is poor, but highly positive. No material relationships between other features are proven.

Based on the statistical analysis, we are of the opinion that the number of (accommodation and catering) services sold – the major determinant of the economic effects of tourist activities of the eco-agritourism farms – does not depend only on the natural attractiveness and recreational facilities of a site. We may assume that factors influencing the demand for eco-agritourism services also include a distance from large urban agglomerations to the farm, the accessibility of the farm, good cuisine, nice atmosphere and accommodation standard – all these differing significantly in the eco-agroiturism farms.<sup>27</sup>

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<sup>27</sup> Ibidem, pp. 261–277.

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## **DOCHÓD Z USŁUG NOCLEGOWYCH I GASTRONOMICZNYCH W GOSPODARSTWACH EKOAGROTURYSTYCZNYCH POLSKI WSCHODNIEJ**

### **Streszczenie**

Celem pracy była ocena efektów ekonomicznych działalności turystycznej w gospodarstwach ekoagroturystycznych, funkcjonujących na terenie Polski Wschodniej oraz określenie związku pomiędzy wielkością dochodu z usług noclegowych i gastronomicznych a wyposażeniem bazy rekreacyjnej w gospodarstwach i atrakcyjnością wiejskiej przestrzeni rekreacyjnej. Badania przeprowadzono w 2010 roku w 50 gospodarstwach zlokalizowanych na terenie województwa mazowieckiego, podkarpackiego, podlaskiego, świętokrzyskiego i warmińsko-mazurskiego. Materiał źródłowy zebrano techniką wywiadu bezpośredniego. Narzędziem badawczym był kwestionariusz ankiet skierowany do właścicieli gospodarstw. Uzyskane dane pozwalają stwierdzić, że nadwyżka bezpośrednia z usług noclegowych i gastronomicznych w gospodarstwie wynosiła średnio 70 997,36 zł. Najwyższą jej wartość uzyskano w województwie podkarpackim (137 485,56 zł) i warmińsko-mazurskim (118 638,91 zł), a najniższą w województwie świętokrzyskim (19 686,21 zł) i podlaskim (21 946,37 zł). Dochód uzyskany z jednego sprzedanego miejsca (POR) kształtował się w przedziale 34,13–76,71 zł. Natomiast

dochód przypadający na jedno dostępne miejsce (PAR) wahał się w granicach od 0,84 zł do 42,76 zł. Wartość nadwyżki bezpośredniej była istotnie skorelowana z atrakcyjnością wiejskiej przestrzeni rekreacyjnej i wyposażeniem bazy rekreacyjnej. Natomiast na wartość wskaźnika (PAR) istotny wpływ miało tylko wyposażenie bazy rekreacyjnej. Związek tych cech był słaby, ale istotnie dodatni. Pomiędzy pozostałymi cechami nie udowodniono istotnych zależności.

**Słowa kluczowe:** wskaźnik atrakcyjności wiejskiej przestrzeni rekreacyjnej, baza rekreacyjna, nadwyżka bezpośrednia, POR, PAR

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## **FACTORS AFFECTING THE DEVELOPMENT OF CATERING ENTERPRISES IN POLAND**

### **Abstract**

In the European Union, including Poland, catering services are the largest industry in the hospitality sector. In today's world, catering companies play an important role in meeting the changing nutritional needs of consumers. The industry of catering services generates the largest part of added value and the majority of jobs in the hospitality sector. The development of catering services is undoubtedly related to the social and economic changes taking place in recent years in our country. This phenomenon is related to both the rich and the poor, because the offer is diverse catering companies. The research hypothesis is that the development of catering enterprises is unequal across the regions of Poland, and various factors having different correlative interrelations affect it. The research aim is to investigate the factors affecting the development of catering enterprises in Poland. The geographic distribution of catering enterprises into the regions of Poland is uneven: the highest concentration of enterprises is in Mazovia Province. In the period of 2000-2013, the number of catering enterprises has increased in most provinces. In the coming years will continue to develop possibility of increasing the efficiency of the market participants, as evidenced by both macroeconomic and microeconomic indicators.

**Keywords:** management, catering enterprises, restaurants, tourism, development, factors

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## Introduction

The context in which it operates: the modern consumer in the past decades (the development of civilization, globalization, accelerating the pace of life, invasion of new products and patterns of behavior, change in the economic and socio-demographic in the country, etc) has transformed the general model of consumption, including service consumption. This phenomenon is manifested in the rapid growth of consumption of services becoming a larger share of total consumption.<sup>1</sup>

The refreshments market is an important part of tourism economy. The development of catering services and tourism are closely linked. Between gastronomy and tourism there is a feedback loop.<sup>2</sup> The development of tourism and the catering industry is closely linked with the evolution of transportation and economic development, which led to the emergence of a new industry – tourism.<sup>3</sup> Owing to the development of tourism and the increased number of visitors to Poland as well as domestic tourists, the creation of new options were forced. This in turn encourages tourists to visits places with the developed infrastructure. This applies mainly to large cities, but can concern smaller cities, too. It should be emphasized that the definition of tourism adopted by the UNWTO (United Nations World Tourism Organization) stating that „tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited”<sup>4</sup>, emphasizes the relationship between the hotel and catering and tourism, namely the need to create a database providing guests with the relevant conditions of stay and all kinds of entertainment. However, it should also be noted that gastronomy is often the goal of a tourist in itself, as evidenced by the development of culinary tourism.

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<sup>1</sup> M. Boguszewski-Kreft, *Usługi jako wiodący sektor współczesnej gospodarki*, “Handel Wewnętrzny” 2003, No. 4–5; E. Babicz-Zieliński., R. Zabrocki, *Zachowania konsumentów na rynku wybranych form usług żywnościowych*, “Handel Wewnętrzny” 2005, No. 6; A. Dąbrowska, *Rozwój rynku usług w Polsce: uwarunkowania i perspektywy*, SGH, Warszawa 2008.

<sup>2</sup> E. Kwiatkowska, *Usługi gastronomiczne a rozwój turystyki w Polsce*, in: *Rozwój turystyki w warunkach Unii Europejskiej*, eds. W. Cabaj, J. Feczko, WSEiP, Kielce 2009, pp. 67–69.

<sup>3</sup> T. Knowles, *Zarządzanie hotelarstwem i gastronomią*, PWE, Warszawa 2001, p. 21.

<sup>4</sup> [http://statistics.unwto.org/sites/all/files/pdf/unwto\\_tsa\\_1.pdf](http://statistics.unwto.org/sites/all/files/pdf/unwto_tsa_1.pdf).

In today's world, catering companies play an important role in meeting the changing nutritional needs of consumers, which are carried out. The development of catering enterprises is undoubtedly related to the social and economic changes taking place in recent years in our country, in particular those in the conditions and lifestyles of different socio-economic groups due to both high and low income. This phenomenon concerns both the rich and the poor.

The research aim is to analyse the current situation and investigate the factors affecting the development of catering enterprises in Poland. The following tasks are set to achieve the research aim: to investigate the changes in indicators of catering enterprises in Poland and identify the factors affecting the development of catering enterprises. The research object is enterprises engaged in the industry of catering services. The research period is the years 2000–2013. The paper uses the secondary sources of information such as the statistical data of the Central Statistical Office (CSO), business reports, and industry newsletters and publications.

## **1. Characteristics of catering enterprises in Poland**

The primary objectives of catering enterprises is the preparation and sale of food and beverages to be consumed either within the facility or for take away consumption for tourists and domestic consumers. Catering establishments include permanent and seasonal catering establishments and outlets. Seasonal catering establishments are open for a certain period of time and operate not longer than six months in a calendar year. Portable retail sales points and vending machines are not treated as catering establishments. The sites of this type are divided into two groups: the establishments available in all ways to the general public and the establishments that target service to specific groups of consumers.

One of the characteristics of the catering establishment development is the number of these enterprises (Table 1). According to CSO data, in 2013 there were 67 693 catering establishments as compared to 84 342 in 2000; 90 537 in 2004, and 81 789 in 2008.<sup>5</sup> According to the data in Table 1, the number of catering enterprises gradually increased in Poland in the period of 2000–2007 (the economic boom period) and after 2007 – it gradually decreased (the economic crisis period).

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<sup>5</sup> E. Gheribi, *Konsument i przedsiębiorstwo na rynku usług gastronomicznych*, Black Unicorn, Jastrzębie Zdrój 2013, p. 102.

Table 1

Number of catering establishments and market share in %  
in Poland in the years 2000–2013

Specification	2007	in %	2008	in %	2012	in %	2013	in %	Increase/ decrease 2013/2000 (in %)	Increase/ decrease 2013/2007 (in %)
Total	88 995	100	81 789	100	68 787	100	67 693	100	-19,74	-23,93
including:										
public sector	2 237	2,51	1863	2,27	1430	2,1	1 221	1,8	-63,23	-45,41
private sector	86 758	97,49	79 926	97,7	67 357	97,9	66 472	98,2	-17,96	-23,38
Restaurants	10927	12,2	13947	17,2	16 478	23,9	16 936	25,0	+98,80	+54,99
Bars	38 391	43,1	33 486	40,9	25 885	37,6	25 195	37,2	-30,86	-34,37
Eating facilities	33 717	37,8	29 051	35,5	21 120	32,2	21 447	31,6	-33,76	-63,60
Canteens	6576	6,9	5305	6,4	4304	6,3	4 115	6,1	-41,30	-37,42

Source: own calculations based on CSO (GUS) data.

The decreasing number of catering establishments (excluding restaurants) proves that the economic crisis has also been observed in the described sector. At present most catering establishments, approximately 98.2%, are privately owned. The catering establishments structure is dominated by bars (37.21% of the total number) and eating facilities – food stands (31.68% of the total number). The next largest group is restaurants (25.01% of total number), and canteens comprise only 6.1% total number of catering establishments. According to CSO data, in 2013 there were 16 936 restaurants, compared to 8 519 in 2000, 9 195 in 2004 and 13 947 in 2008.<sup>6</sup>

The restaurant industry is a significant improvement in the quality and variety of services, but the industry still is not available to many consumers. These changes are particularly evident in big cities. According to Masłowski,<sup>7</sup> opinions and expert estimates indicate significant structural transformations taking place within the community. These transformations are reflected in the dynamic increase of the number of companies specializing in the Polish regional cuisine as

<sup>6</sup> Ibidem, p. 102

<sup>7</sup> A. Masłowski, *Rynek usług gastronomicznych uwarunkowania i kierunki rozwoju*, IRWiK, Warszawa 2001, p. 9.

well as other national cuisines (Italian, Chinese, Japanese, Arabic).<sup>8</sup> Restaurants represent higher quality services than a few years ago in both the property (interior, accessories), offered meals (breakfast, lunch, dinner, brunch), and services (home delivery, takeaway sales, organization of events).<sup>9</sup>

The data of Tab. 2 show that the highest concentration of enterprises engaged in the industry of catering services is in the Mazovia Province (4937 enterprises in 2013), which accounts for 31.23% of all catering enterprises in Poland. According to CSO data, most of catering establishments is located in the provinces of: Mazovia (31.23%), Little Poland (10.93%) and Silesia (10.22%). In the majority of provinces (in 2013 and as compared to 2010), there increased the number both of total catering establishments and restaurants (Tab. 2). The number of catering enterprises and restaurants has increased mostly in the Mazovia Province, where the Polish capital, Warsaw, is located. The geographic distribution of catering enterprises is uneven in the regions of Poland as is shown in Table 2.

One major element that shows an increase in the catering market is the systematically growing revenue. The revenue of catering establishments is generated mainly by own food production, followed by alcohol and tobacco sales. It needs to be highlighted that the revenue generated by own food production has been rapidly increasing. In 2013, own production generated 72.6% of total catering activity revenue. From the sale of trade commodities including alcoholic beverages, tobacco has generated 25.10%. Only 2.28% of the revenue has been generated by other economic activities (Table 3).

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<sup>8</sup> E. Gheribi, *Konsument i przedsiębiorstwo na rynku usług gastronomicznych*, Black Unicorn, Jastrzębie Zdrój 2013, pp. 113–116.

<sup>9</sup> *Ibidem*, p. 106.

Table 2

Number of catering establishments by province in Poland in the years 2007–2013\*

Province	Catering establishments									
	Total					Included restaurants				
	2010	2011	2012	2013	Increase/decrease 2013/2010 (in %)	2010	2011	2012	2013	Increase/decrease 2013/2010 (in %)
Poland	14408	13886	15137	15807	+9,71	4625	4447	4806	5264	+13,82
Lower Silesia	1219	1218	1304	1341	+10,01	414	413	420	450	+8,70
Kujawy-Pomerania	524	487	534	543	+3,63	181	167	184	201	+11,05
Lublin	509	511	465	432	-15,13	123	137	146	177	+43,90
Lubusz	297	251	239	236	-20,54	107	99	87	91	-14,95
Łódź	664	565	549	625	-5,87	287	250	185	214	-25,44
Little Poland	1480	1422	1614	1728	+16,76	515	480	612	668	+29,71
Mazovia	3992	4025	4771	4937	+23,67	913	938	1120	1209	+32,42
Opole	254	217	247	235	-7,48	94	77	99	100	+6,38
Podkarpatcie	511	535	531	563	+10,18	183	206	184	208	+13,66
Podlasie	334	291	280	301	-9,88	107	107	101	114	+6,54
Pomerania	702	678	723	869	+23,79	234	215	230	311	+32,91
Silesia	1581	1532	1557	1615	+2,15	570	548	594	633	+11,05
Świętokrzyskie	283	272	341	309	+9,19	93	93	113	115	+23,66
Warmia-Mazovia	444	396	413	397	-10,59	162	147	157	173	+6,79
Great Poland	968	893	1003	986	+1,86	432	398	403	397	-8,10
West Pomerania	646	593	566	690	+6,81	210	172	171	203	-3,33

Source: own calculations based on CSO (GUS) data

\* Data concern the enterprises employing more than 9 persons.

Table 3

Revenues from catering activity (current prices)  
in mln zł in the years 2000–2013 in Poland

Specification	2000	2007	2010	2013	Increase/ decrease in 2013/2000 (in %)	Increase/ decrease in 2013/2007 (in %)
Revenues from catering activity	15 381	20 220	21 683	25 701	+67,09	+27,10
From catering production	7 740,5	12 286	15 022,0	18 661	+141,08	+51,88
From sale of trade commodities of which from the sale of alcoholic beverages, tobacco	6 967,0	7 369	6 043,2	6 452	-7,4	-17,99
From other activity	673,5	565	617,6	588	-12,7	+9,2

Source: own calculations based on CSO (GUS) data.

## 2. Factors affecting the development of catering enterprises

The scale and structure of catering establishments are impacted primarily by consumers. The demand for the development of catering establishments' conditions is related to the level of the economic development in terms of the macro-(national product, unemployment rate) and the micro level (the income situation, the structure of expenditure, the socio-demographic – cultural households).

Among the general conditions for the development of catering services, the following have been highlighted:

- economic growth (Table 4),
- general increase in job involvement,
- increase in women's professional activity (Table 5),
- increase in the level of education and skills of the population (Figure 1),
- growth in consumer income individuals (Figure 2),
- extent of life and an increase in the number of people in the working age,
- change in the population's demographic structure: a growing share of 1- and 2-persons households, and three or more decreases (Figure 3),
- changes in consumer attitudes and motivation,
- changes in time management,
- development of tourism,

- increase in the spendings on restaurant and hotel services (Table 6), (Figure 4),
- increase in the interest in other nations' cultures.

In recent years the possibility of increasing the efficiency of market participants has developed, as evidenced by the macroeconomic indicators showing economic growth, unemployment and the demographic situation. Gross domestic product is the main category in the system of national accounts and illustrates the final result of the activity of all entities of the national economy. The basic component of gross domestic product is the sum of gross added value of all ownership sectors, or institutional sectors, or all sections of the national economy. In terms of the gross domestic product (GDP), Poland is the 9th biggest economy in the EU and the 23rd biggest economy in the world (2011 GDP in current prices, USD-denominated).<sup>10</sup> Poland's GDP increased by 8.3% in 2010/2013 according to the updated estimates by CSO. At the same time, the domestic demand grew by 3.5%. This data shows an economic recovery when compared with the tough last year. The dynamics of the gross domestic product (GDP) growth, domestic demand, and final consumption expenditure is shown in Table 4.

Table 4

Indices of main macroeconomic categories in the national economy (constant prices)

Specification	2007	2008	2009	2010	2011	2012	2013			
	Previous year = 100							2000 = 100	2005 = 100	2010 = 100
Gross Domestic Product (GDP)	106,8	105,1	101,6	103,9	104,5	102,0	101,6	158,4	136,2	108,3
Domestic demand	108,7	105,6	98,9	104,6	103,6	99,9	100,0	147,2	131,8	103,5
Final consumption expenditure	104,6	106,1	102,0	103,4	101,6	101,0	101,2	148,3	127,8	103,8

Source: own calculations based on CSO (GUS) data.

Over recent years, observers have grown accustomed to the Polish economy's relatively good performance against the backdrop of the region of Central and Eastern Europe as well as the entire European Union. It was particularly visible

<sup>10</sup> IMF, World Economic Outlook Database, April 2013.

in 2009, when Polish GDP, according to Eurostat data, grew by 1.6%, thus making Poland the only EU country with positive economic growth. It was also in 2010 and 2011 that the Polish economy stood out among European peers: the Polish GDP growth by 3.9% in 2010 was the third highest in the EU, while the 4.5% economic growth in 2011 ranked Poland fourth among the 27 member states.

As a result of the profound changes in the Polish labour market, the current levels of employment and economic activity in Poland differ significantly from other EU economies. Just over half of Poland’s population aged over 15 is economically active. The high level of economic inactivity among Poles is a phenomenon caused by the delay in young people entering the labour market on the one hand, and the growing number of persons taking retirement, pension or early retirement on the other. According to CSO results, the number of working people aged over 15 amounted to 15 568 000 in 2013. Compared to 2012, there is a decrease in the average annual level of employment by 0.1%. Women’s employment rate stands at 63%, and that of men – at 75%. Women’s participation in the economy and their contribution to family finances have increased, thereby decreasing the gender employment gap. In the meantime, women still bear the brunt of unpaid work within the household and family. Compared to 2000 and 2007, the number of working men and women has increased (Table 5).

Table 5

Economic activity of the population aged 15 and more in Poland  
in the years 2007–2013 in thous

Specification	2007	2008	2009	2010	2011	2012	2013	Increase/ decrease in 2013/2000 (in %)	Increase/ decrease in 2013/2007 (in %)
	Annual averages								
Economically active persons	16 859	17 011	17 279	17 123	17 221	17 340	17 361	+0.35	+2.97
Men	9 234	9 317	9 455	9 446	9 504	9 551	9 568	+1.81	+3.61
Woman	7 799	7 626	7 824	7 677	7 717	7 789	7 793	-1.39	-0.07
Employed persons	15 241	15 800	15 868	15 473	15 562	15 591	15 568	+7.07	+2.14
Men	8 403	8 718	8 722	8 566	8 648	8 651	8 641	+7.12	+2.83
Woman	6 838	7 082	7 147	6 908	6 914	6 940	6 927	+6.99	+1.3

Source: own calculations based on CSO (GUS) data.

However, the microeconomic factors should mainly include: income, household spending on food and nutritional goals, and other – cultural and social – factors.<sup>11</sup> An increase in wages of the Polish society makes it more and more likely to spend money, and this affects the growth of private consumption.<sup>12</sup>

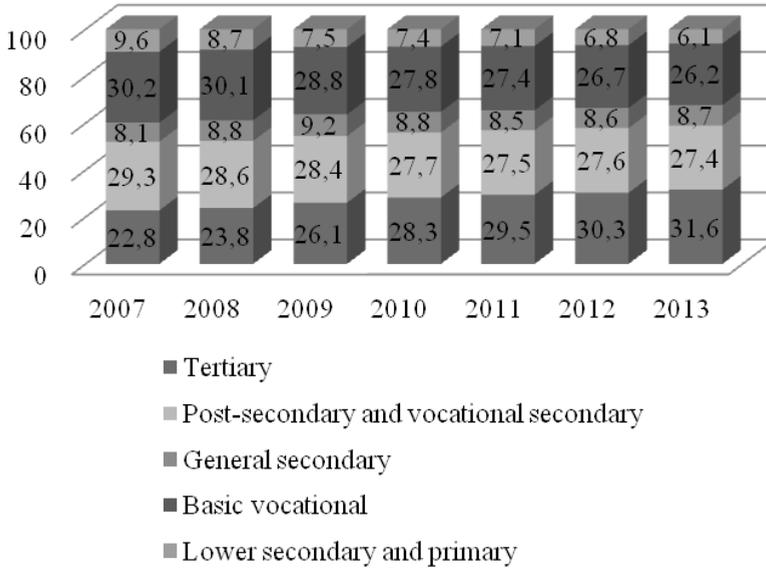


Fig. 1. Structure of employed persons by educational level in 2007–2013 in %  
Source: own calculations based on CSO (GUS) data.

In the European reporting, household expenditures on meals in restaurants and hotels are presented together. The share of the Polish household expenditures equalled 1.4 % in 2000 and increased to 2.3% in 2009, in 2013 it increased to 3% thus indicating a very low level in comparison to other countries (e.g. Malta 18,1%, Spain 16%, Greece 12.9%).<sup>13</sup> The expenditure on catering services depends, among other factors, on family size (Figure 3). The highest expenditures for restaurants and hotels per capita in households have been noticed in one-

<sup>11</sup> E. Gheribi, *Uwarunkowania rozwoju przedsiębiorstw gastronomicznych w Polsce*, "Marketing i Rynek" 2013, No. 4, pp. 29–35.

<sup>12</sup> E. Kwiatkowska, *Udział usług gastronomicznych w realizacji potrzeb żywieniowych konsumentów*, "Marketing i Rynek" 2010, No. 7, pp. 28–33

<sup>13</sup> Eurostat Database, 2013.

person households, the lowest – in multi-person households. The highest share has been noticed in self-employed households, the lowest in farmers households (Table 7).

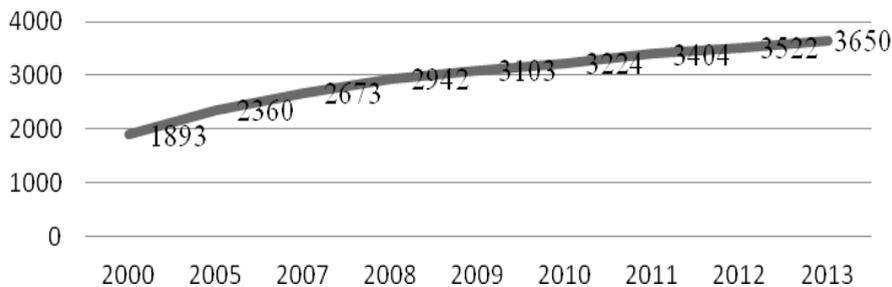


Fig. 2. Average monthly gross wages and salaries 2000–2013

Source: own calculations based on CSO (GUS) data.

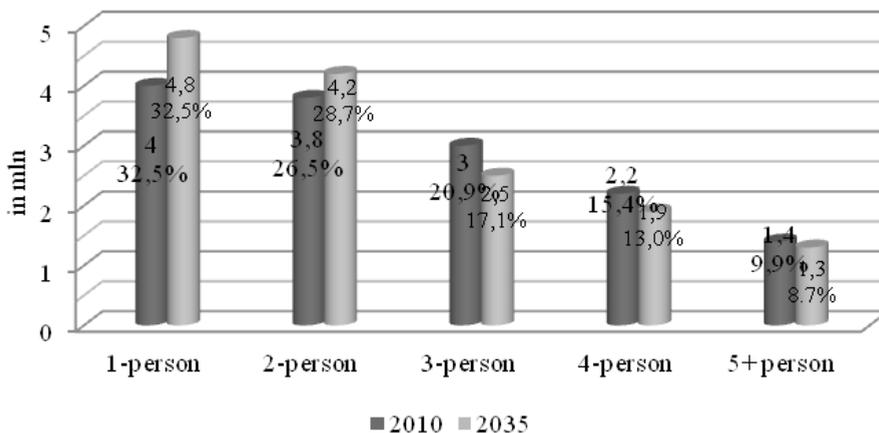


Fig. 3. Forecast of household structure for the years 2010–2035 in Poland in mln

Source: own calculations based on CSO (GUS) data.

Table 6

Average monthly expenditures for restaurants and hotels per capita  
in households in 2000–2013 in Poland

Specification	2007	2008	2009	2010	2011	2012	2013	Increase in 2013/ 2000 (in %)	Increase in 2013/ 2007 (in %)
Restaurants and hotels	15,39	18,08	20,72	22,93	24,82	29,25	30,64	264.32	99.09
Of employees	16,82	19,60	23,44	25,19	28,49	32,56	33,78	202.41	100.83
Of farmers	4,80	8,62	5,68	6,42	5,21	9,65	13,01	703.08	171.04
Of the self- employed	31,05	36,53	35,44	42,98	39,79	49,12	54,40	247.82	75.20
Of retirees and pensioners	9,41	9,93	12,05	12,76	13,51	17,21	18,14	257.79	92.77

Source: own calculations based on CSO (GUS) data.

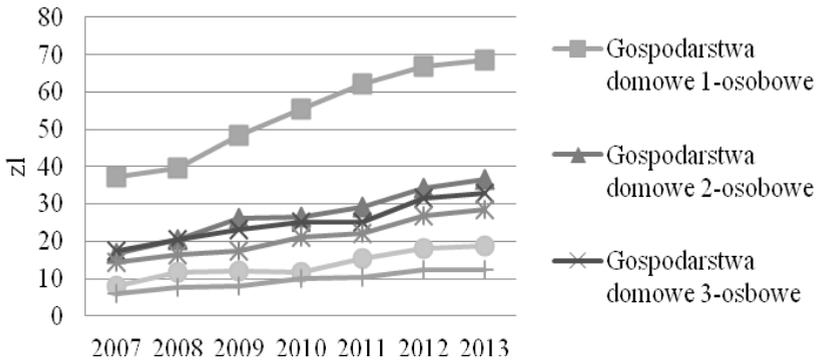


Fig. 4. Average monthly per capita expenditures in households by number of persons for catering services in 2007 and 2013 (in zlotys)

Source: own calculations based on CSO (GUS) data.

## Conclusion

In conclusion, we can say that recent decades have seen a dynamic development of catering enterprises in Poland. At present, more and more frequently we eat in a restaurant, canteen etc., or at a place “on our way.” In the forthcoming

years, an increase in demand for catering services is predicted taking into consideration the foreseen economic growth and improved financial standing of Polish households. The catering sector is heavily dependent upon disposable incomes. The increase in the population's wealth and changes in eating habits and lifestyle create a great opportunity and challenge for the development of a wide range of food services. Consequently, the income of the catering businesses will grow.

Despite the fact that the use of catering services in Poland, as compared to the developed countries, is still low, the demand for eating outside the home in the country will continue to grow.

An undoubted obstacle which quantifies the qualitative development of the restaurant is a barrier in demand associated with the slow increase in consumer real wages, rising operating costs – particularly personnel costs (wages, social insurance, social costs), the cost of renting and others. However, in the forthcoming years an increase in the demand for catering services is predicted.

The development of the catering market and its direction will depend on three main factors of change: socio-economic, demographic and cultural.

Poland is considered by many official organizations as one of the most attractive tourist destinations in the world, so these circumstances will certainly contribute to the situation that in the forthcoming years the number of tourists coming to Poland and the number of people using hotels and restaurants services will increase.

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## CZYNNIKI WPLYWAJĄCE NA ROZWÓJ PRZEDSIĘBIORSTW GASTRONOMICZNYCH W POLSCE

### Streszczenie

W Unii Europejskiej, w tym w Polsce, usługi gastronomiczne są największym przemysłem w sektorze hotelarskim. W dzisiejszym świecie, firmy gastronomiczne odgrywają ważną rolę w zmieniającym się zaspokajaniu potrzeb żywieniowych i społecznych. Branża usług gastronomicznych generuje największą część wartości dodanej i oferuje większość miejsc pracy w tym sektorze. Rozwój usług gastronomicznych jest niewątpliwie związany ze zmianami społecznymi i gospodarczymi zachodzącymi w ostatnich latach w naszym kraju. Zjawisko to związane jest zarówno z bogatymi jak i biednymi, ponieważ oferta jest różnorodna. Hipotezą badawczą jest to, że rozwój przedsiębiorstw cateringowych jest nierównomierny w poszczególnych regionach Polski i są różne czynniki, które wpływają na ich rozwój. Celem badania była identyfikacja czynników wpływających na rozwój przedsiębiorstw gastronomicznych w Polsce. Podział geograficzny Przedsiębiorstwa gastronomiczne w Polsce są nierówno rozmieszczone w podziale geograficznym. Najwyższa koncentracja tego typu przedsiębiorstw występuje w województwie mazowieckim. W okresie 2000–2013 liczba przedsiębiorstw gastronomicznych wzrosła w większości województw. W najbliższych latach będzie nadal się rozwijać dzięki możliwości zwiększenia efektywności uczestników rynku, o czym świadczą zarówno wskaźniki makroekonomiczne i mikroekonomiczne.

**Słowa kluczowe:** zarządzanie, przedsiębiorstwa gastronomiczne, restauracje, turystyka, rozwój, czynniki

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**THE TOURIST ATTRACTIVENESS OF RURAL SPAS  
ON THE EXAMPLE OF PRZERZECZYN-ZDRÓJ  
AND DŁUGOPOLE-ZDRÓJ**

**Abstract**

The conducted research involves an attempt at evaluating the attractiveness of rural spas using the example of two Lower Silesian villages – Przerzeczyn-Zdrój and Długopole-Zdrój. The authors pursue the answer to the following question: “Can rural spas be evaluated in the context of attractiveness, as is the case with urban ones? What guidelines can be used for the purpose of such an evaluation?” This is followed by an initial formulation of the elements determining the attractiveness of a spa, which include: the location of the spa in the context of important road, railway and bus passage-ways (accessibility); topographic location; the curative (medicinal) climate; the existence of curative materials (curative mineral waters, peloids etc.); the types of curative treatment available; available night lodgings in sanatoriums, spa hospitals, hotels, pensions, motels, inns; spa well-rooms; Spa Houses, green areas (including Spa Parks and forests); amphitheatres; bandshells; Spa Theatres; restaurants, cafés, bars and other gastronomic outlets; tourist attractions; non-curative functions; non-curative tourist infrastructure; the types of treated illnesses; the architectural and urban consistency of curative facilities; public utility infrastructure; the quality of the environment.

**Keywords:** village, Przerzeczyn-Zdrój, Długopole-Zdrój, spa, curative function, attractiveness, multifunctionality

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## Introduction

When discussing the tourist attractiveness of rural spas one should reflect on whether it may be measured using the same guidelines used in respect to curative centres located in both small and large cities.<sup>1</sup> The indicators available for the tourist function have a purpose in deliberations on the subject of spa attractiveness. The concept of the tourist and curative function indicator has already been established by other scientists.<sup>2</sup> Despite the fact that rural spas follow their own set of principles, their multifunctional nature – an indispensable element of their functioning and potential development – should be utilised within a market economy.<sup>3</sup> The development of tourist and spa areas has been provided with a theoretical description in the concepts of S.C. Plog and R.W. Butler.<sup>4</sup> The multifunctional character of spa towns results from the need to introduce new, attractive functions apart from the typical curative function, addressed to the tourist in the broadest sense of the term, not exclusively to patients. These include the sports and recreation function or the spa and wellness function,<sup>5</sup> as well as functions related to gastronomy, hotel accommodation, leisure, recurring events and tourist attractions. The sports and recreation function mostly involves

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<sup>1</sup> Z. Kruczek, *Atrakcje turystyczne. Fenomen typologii, metody badań (Tourist attractions. The phenomena of their typology and research methods)*, “Monograph”, No. 10, Proksenia, Kraków, 2011, p. 18; Z. Kruczek, *Atrakcyjność turystyczna uzdrowisk karpaccich (The touristical attractiveness of Carpathian spas)*, in: *Uzdrowiska i ich funkcja turystyczno-lecznicza (Spas and their touristical-curative function)*, “Monograph”, No. 13, Proksenia, Kraków 2012, pp. 59–72.

<sup>2</sup> A.R. Szromek, *Wskaźniki funkcji turystycznej. Koncepcja wskaźnika funkcji turystycznej i uzdrowiskowej (The tourist function indicators. The concept of the tourist and curative function indicator)*, Silesian University of Technology Publishing House, Gliwice 2012, p. 199.

<sup>3</sup> A. Gotowt-Jeziorska, J. Wyrzykowski, *Turystyka a uzdrowiska (Tourism and spas)*, Polish Tourist Association, Warszawa 2005.

<sup>4</sup> A.R. Szromek, *Rozwój obszarów turystycznych i uzdrowiskowych w koncepcjach S.C. Ploga i R.W. Butlera (The development of touristical and curative areas in the concepts of S.C. Plog and R.W. Butler)*, “The Silesian University of Technology Research Bulletins”, Organisation and Management Section, Vol. 54/2010, Gliwice, pp. 305–322; R.W. Butler, *The concept of the tourism area cycle evolution: implications for management of resources*, “The Canadian Geographers” 1980, Vol. 24/1, pp. 5–12.

<sup>5</sup> A. Hadzik et al., *Konkurencyjność produktu turystyki uzdrowiska Kołobrzeg (The competitiveness of the tourism product of the Kołobrzeg spa). Znaczenie innowacyjnych usług i infrastruktury prozdrowotnej (The importance behind innovative services and pro-health infrastructure)*, Acta Scientiarum Polonorum- Oeconomia No. 9 (4), Tourism Experts Board, Warsaw University of Life Sciences, Warszawa 2010 pp. 153–164.

indoor and outdoor swimming pools, various types of sports fields, cycling and walking routes, alpine slides, ski pistes and ski lifts.<sup>6</sup> The leisure function serves to stimulate social and economic development. The objective development of the leisure tourist function requires an increased economic effort.<sup>7</sup> Leisure related costs are constantly growing. An increasing number of people, including youth, is interested in rest and relaxation at a spa, even for a short period of time. Regardless of their age, contemporary people wish not only to be healthier, but prettier as well, thus the spa and wellness function comes into play.<sup>8</sup> Spa and wellness centres are more commonly found in small rural or urban settlements (e.g. Długopole-Zdrój). They usually operate as “renewal centres”, with medical treatment serving a supplementary role. The attractiveness of a spa rises as it introduces spa and wellness related services.<sup>9</sup> A spa of this type may be considered not only a health centre, but also as a beauty centre. The gastronomic function is most commonly combined with the hotel function, though quite often it also functions on its own.<sup>10</sup> Gastronomy serves as an important stimulus for the growth of tourism, as it has a direct impact on the size of tourist movement and the quality of its management. The important character of gastronomic services offered to tourists mainly revolves around the fact that they serve as a substitute for food-related services performed at home by the tourists themselves.<sup>11</sup>

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<sup>6</sup> R.W. Butler, *The concept of the tourism area cycle evolution: implications for management of resources*, “The Canadian Geographers” 1980, Vol. 24/1, pp. 5–12.

<sup>7</sup> T. Iwanek, *Turystyka uzdrowiskowa w gospodarce regionu i kraju (Curative tourism in the economy of the region and the state)*, “Edukacja” College of Management Publication House, Monographs – Joint Publications at the “Edukacja” College of Management in Wrocław, Wrocław 2006.

<sup>8</sup> M. Łazarek, R. Łazarek, *Uzdrowiska w Europie. Teraźniejszość i rys historyczny (Spas in Europe. Contemporary times and a historical outline)*, Vincent Pol University in Lublin Publishing House, Lublin 2007; A. Mroczek-Czetwertyńska, A. Rapacz, *Popyt na usługi Spa&Wellness i możliwości jego zaspokojenia na przykładzie Dolnego Śląska (The demand for Spa & Wellness services and the possibilities for its fulfilment using the example of Lower Silesia)*, University of Szczecin Research Bulletin, Economic issues related to Services, No 84 (Tourist demand. Consumption-segmentation-markets), Szczecin, 2012, pp. 579–592.

<sup>9</sup> N. Sallmann, *Megatrend wellness & spa (The wellness&spa megatrend)*, PAG, Kraków 2010, pp. 78–79.

<sup>10</sup> A. Kowalczyk, M. Derek, *Zagospodarowanie turystyczne (Tourism management)*, Wydawnictwo Naukowe PWN, Warszawa 2010.

<sup>11</sup> W.W. Gaworecki, *Turystyka (Tourism)*, Polskie Wydawnictwo Ekonomiczne, Warszawa 2003.

Curative spa treatment is performed with the use of spa treatment equipment, which plays a major role in the “ideal” spa model. These include natural therapy resorts, spa well-rooms, thorn houses, parks – including spa, parks – fitness trails, converted sea coast sections, medicinal and rehabilitative therapeutic pools, arranged underground headings usually located in the “A” curative protection zone. These elements constitute the spa infrastructure<sup>12</sup>, formed throughout different historical periods, having a profound impact on the tourist and representing the diverse standard of a given spa establishment. It also serves as an important element in the evaluation of the attractiveness of a spa. This type of infrastructure is usually less extensive in rural spas, than it is in urban ones.

## 1. Scope of the problem

This study is an attempt at indicating the guidelines which need to be taken into account when evaluating the attractiveness of rural spas. The research involves two examples of Lower Silesian villages: Przerzeczyn-Zdrój and Długopole-Zdrój, located in different topographic conditions. They are comparable in size. Since currently rural spas in Poland do not make use of highly developed spa infrastructure or complex communication networks the authoress has introduced the division to rural and urban spas. The technical, social and public utility infrastructure of a rural spa is often less impressive, while its surroundings differ greatly from those of an urban centre (including both small or large cities).<sup>13</sup> It is also visited by a smaller number of patients, tourists in the general sense, outside visitors and local residents. The study includes a set of guidelines determining the attractiveness of a spa, some of which include: the location of the spa in the context of key road, railway and bus passageways (accessibility); its location in the topographic con-

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<sup>12</sup> M. Januszewska, *Zróżnicowanie przestrzenne infrastruktury uzdrowiskowej na Dolnym Śląsku (The spatial diversity of curative infrastructure in Lower Silesia)*, Research Papers No. 967, Wrocław University of Economics, Wrocław 2002, pp. 191–204.

<sup>13</sup> J. Petryszyn, E. Zuzajska-Żyśko, *Od funkcji przemysłowej do turystycznej – przykład Ustronia (From the industrial to the tourist function – the example of Ustron)*, in: *The tourist function of cities. 11<sup>th</sup> Urban Knowledge Seminar*, ed. I. Jażdżewska, Łódź University Publishing House, Łódź 2008, pp. 133–144; E. Zuzajska-Żyśko, *Funkcja turystyczna małych miast województwa śląskiego (The tourist function of smaller cities in the Silesia Province)*, in: *Kształtowanie funkcji turystycznych w miejscowościach uzdrowiskowych (Developing tourist functions in spa towns)*, ed. E. Rydz, PAP, Słupsk 2005, pp. 71–87.

text; the curative (medicinal) climate; the existence of curative materials (curative mineral waters, peloids etc.); the type and number of available curative treatment; available night lodgings in sanatoriums, spa hospitals, hotels, pensions, motels, inns (number and standard); spa well-rooms; Spa Houses, green areas (including Spa Parks and forests located in the spa or in its vicinity); amphitheatres; bandshells; Spa Theatres; restaurants, cafés, bars and other gastronomic outlets; tourist attractions; non-curative functions; non-curative tourist infrastructure; the types of treated illnesses; the architectural and urban consistency of curative facilities; public utility infrastructure; the quality of the environment. Establishing an “ideal” model of a contemporary Polish rural spa using the currently available research results is recommended for future research.

The authoress has formulated the following research thesis: “What kinds of guidelines influence the attractiveness of a rural spa?”

## **2. Essential information regarding the studied spa towns**

Przerzeczyn-Zdrój (German: Bad Dirsdorf) is a spa (multistreet) village in the South-Western Poland, in the Lower Silesian Province, the Dzierżoniów County and the Niemcza municipality. It is located next to a major communication route, i.e. National Route 8 connecting Wrocław and Kudowa-Zdrój. The village is divided across both by a regional road leading to Dzierżoniów and a number of local roads. New single-family structures have been raised near these main communication passageways, especially in the last decade.

The town is located at the foot of the Sudetes and surrounded by the scarcely forested Niemczańsko-Strzelińskie Hills near the source of the River Ślęza. The town has a population of circa 700 (data from 2006). The spa comprises four sanatoriums with 162 beds.

The first mention of Przerzeczyn can be traced back to the year 1264. The town's initial name was Pyrzyce (the Slavic etymology). It has been renamed Bad Dirsdorf in the 1930s. The three former administrative names included: NiederDirsdorf, OberDirsdorf and Dirsdorf. The name Przerzeczyn-Zdrój was officially introduced in 1946.<sup>14</sup>

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<sup>14</sup> B. Mirek, *Przerzeczyn-Zdrój – o mojej wsi opowieść (Przerzeczyn-Zdrój – a tale of my village)*, Wrocław 2004.

As a spa, Przerzeczyn began its operations in the 19th century, after Friedrich August von Pfeil (1785–1830), the owner of Lower Przerzeczyn, had discovered mineral waters in the area. The spa was constructed by Friedrich Ludwig von Pfeil (1780–1857), the owner of Upper Przerzeczyn. The newfound spring (discovered while searching for chrysoprase deposits) known as “Rozrabiacz” (“Troublemaker”) or “Śmierdziel” (“Stinker”, due to its strong smell of sulfur compounds) was used in the treatment of various illnesses (including ulcers). The year 1802 is considered the founding date of the spa in Przerzeczyn, with the year 1827 marking the beginning of its commercial activity. 1840 saw the construction of the Grand Spa House with 17 rooms for patients. It was accompanied by a separate building with showers and water heated by steam pumps, as well as the “Namiot” (“Tent”) restaurant and a promenade. A special folder provided a description of the spa and a price list for services related to accommodation and treatment. The number of patients increased every year, with more people interested than there were rooms for. Consequently, a number of private quarters became available in the village. In 1936 the spa had the following spa infrastructure at its disposal: sanatoriums, the Spa House, the hotel, a restaurant with a billiard hall and a reading room, a square with deckchairs, a spring in an interesting exposition, part of the Spa Park and a dance hall for 100 people. The spa served as a treatment and rehabilitation centre for German soldiers during WWII. After the war, in the spring of 1946, the spa resumed its curative services with circa 60 beds available.<sup>15</sup> The community house built in the 1950s with a theatre room and a cinema with 150 seats is currently a high-standard pension (with a swimming pool).

In the 1980s works began on a sewage plant and a new sanatorium catering outlet for 300 persons (commissioned in 1990). At the time of governmental transformations in Poland both the spa and village were connected to a gas supply and the standard of the services provided to the patients improved. Starting from the 1990s, the spa offered around 30 different types of curative treatment, including traditional mineral radioactive and sulphidic baths, hydro massage, pearl baths, peloid wraps (using the best peloids available in the country), inhalations, massages, curative gymnastics, scotch douches, cryotherapy, saunas

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<sup>15</sup> A.M. Soroczyńska, *Walory środowiskowe najmniejszego uzdrowiska w Polsce, Przerzeczyzna-Zdrój (The environmental values of the smallest spa in Poland – Przerzeczyn-Zdrój)*, Infrastruktura i Ekologia Terenów Wiejskich Vol. 10, PAN, The Rural Technical Infrastructure Commission, Kraków 2011, pp. 133–146.

and a swimming pool (since 2003). In 1999 the enterprise was transformed into a limited liability company State Treasury as its sole shareholder. In 2011 PCZ S.A. with its registered office in Wrocław signed a purchase contract for 85.72% of the company's issued capital from the State Treasury.

A new spa complex with a hospital is currently under construction (for 25 million PLN). Its completion will allow for the capacity of the sanatorium to be increased up to 400 rooms for patients. Another planned addition is a cardiological inpatient rehabilitation unit for systemic rehabilitation in stationary conditions, to be used for rehabilitation, physiotherapy, diagnostic studies and their respective supplementary services. The PCZ Polskie Uzdrowisko Ciepłowody Przerzeczyn-Zdrój is one of the smallest facilities of this type in the country. Plans exist of strengthening its position on the curative market by means of this investment as well as of becoming part of the medium-sized Polish spas group.

Długopole-Zdrój (German: Bad Langenau) is a village (570 residents, data from 1998) located in the Lower Silesian Province, in the Kłodzko County and the Bystrzyca Kłodzka municipality, in the Central Sudetes, in the southern part of the Kłodzko Valley, in the watershed of the upper course of the River Nysa Kłodzka, at an altitude of 300 to 900 meters m.a.s.l., between the Bystrzyckie Mountains in the west and the Śnieżnik Mountains in the east. The region is attractive for tourists, with a diversified natural topography, a mild submountaine climate (bioclimatic submontane and montane zone 6, medium stimulus bioclimate type, periodically high stimulus type). The town is the smallest spa in the Kłodzko Land. It stretches for circa 1.0 km, mainly along the left shore of the Nysa Kłodzka (small linear village). The spa directly shares its borders with buildings in Długopole Dolne in the north and Długopole Górne in the south. The climatic conditions in the area furthers rest, rehabilitation and treatment. The architecture of Długopole-Zdrój consists mostly of the garden-city villa type built up, typical of spas. It forms a consistent complex with features characteristic for the resort architecture of previous historical periods. Many pensions and residences from the 1850s and the beginning of the 20th century still remain in the village. There is a vast Spa Park located in the centre of the spa (it underwent a complex modernisation in the years 2010–2011) with numerous elements of small garden architecture (avenues, wall slopes, terrain stairs). The park is enriched with beautiful specimens of historic trees: pines, yews, sycamores, lime trees and maples.

In order to protect the natural materials required to pursue and develop spa treatment and to develop other environmental factors for the Długopole-Zdrój, three curative protection zones have been established, including the following:<sup>16</sup> the “A” area (zone) of curative protection (this area is reserved only for equipment and structures related to spa treatment); the “B” curative protection area (zone) adjacent to zone “A” and surrounding it, dedicated to service, tourist, recreational, sports-related and public utility structures, residential housing and other structures related to the fulfillment of the needs of people from this area, with little negative impact on the curative features of the spa or the curative protection zone as well as non-intrusive towards the treatment process, or located within the borders of a national park of nature reserve, or constitutes a forest, sea or lake; a buffer zone for area “A”); the “C” curative protection area (zone), which serves as a buffer zone for areas “A” and “B” (an area influencing the retaining of climatic and landscape-related values and the protection of natural deposits of curative materials).

### **3. Selected elements influencing the attractiveness of Przerzeczyn-Zdrój and Długopole-Zdrój. Curative materials**

The basic curative materials of Przerzeczyn-Zdrój include curative natural mineral waters (sulphidic, radioactive and ferruginous) and the climate itself.

Radioactive-sulphidic water with complex medicinal properties is used in balneotherapy. Water rich in magnesium and calcium is used in drinking therapy. There are 3 curative water springs located in the spa which can be used for treatment. These include: the borehole no. 2 with the specific (low mineralised) water 0.043%, the radon water containing hydrogen sulfide in the exploitable yield of 2.27 m<sup>3</sup>/h; the borehole no. 8 with the specific (low mineralised) water 0.055%, the radon water (currently inoperational) in the exploitable yield of 2.4 m<sup>3</sup>/h; the borehole no. 9 with the specific (low mineralised) water 0.048%, the radon water in the exploitable yield of 3.0 m<sup>3</sup>/h.

Przerzeczyn-Zdrój is one of the few places in the world which uses radioactive water treatment.

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<sup>16</sup> Długopole-Zdrój Spa Statement.

The treatment complex is located in the natural therapy resort which offers circa 30 types of treatment. These are divided into five groups: the treatment with balneological materials, i.e. water, peloids, inhalations; current treatment; massages; rehabilitation; light therapy. The illnesses treated at the spa include: rheumatic disorders, osteoarthritis, neuralgia, sciatic and brachial neuritis, post-traumatic disorders, osteoporosis, upper respiratory tract diseases. The treatment methods include whirlpool baths, pearl baths in radon and sulphidic water, dry, whirlpool and vibration massages, peloid wraps and compresses, physical therapy, inhalations and light therapy, rehabilitation pool therapy, aromatherapy.

The climate is submontane, of the medium stimulus type, warm and mild due to a valley-based location. Microclimatic zones exist in the area.<sup>17</sup> The medicinal properties of the climate of Przerzeczyn-Zdrój have been confirmed in 2009 by the Stanisław Leszczyński Institute of Geography and Spatial Organisation.

Curative water is known to have existed in Długopole-Zdrój since the 16th century. Its presence is a result of the dislocation of Precambrian mica shales. There are three springs of curative water with intakes in an old 17 meters deep mining tunnel. These are called “Emilia”, “Kazimierz” and “Renata.” The springs are self-activated. The active yield for “Renata” equals 0.84 m<sup>3</sup>/h, while its exploitable yield is 1.07 m<sup>3</sup>/h. The water from this spring is 0.13% mineral water, rich in sodium bicarbonate, calcium, magnesium, sodium, silicon, iron; The active yield for “Emilia” equals 0.96 m<sup>3</sup>/h, while its exploitable yield is 0.47 m<sup>3</sup>/h. The water in this spring is low mineralized: 0.08% with hydrogen carbonate, calcium, magnesium, radon, iron; The active yield for “Kazimierz” equals 0,15 m<sup>3</sup>/h, while its exploitable yield is 0,41 m<sup>3</sup>/h. The water in this spring is 0.11% mineral water with hydrogen carbonate, calcium, magnesium, sodium and iron. The curative water resources in Długopole-Zdrój should be considered practically inexhaustible, after assuming that they are atmospheric waters that constantly refill themselves and undergo constant mineralization with the contribution of the CO<sub>2</sub> that is still flowing from the depths of the earth. The chemism of these waters and their output may be subject to minor periodic changes depending on atmospheric conditions.

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<sup>17</sup> T. Kozłowska-Szczęśna et al., *Bioklimat uzdrowisk polskich i możliwości jego wykorzystania w lecznictwie (The bioclimate of Polish spas and the possibilities for its utilisation)*, PAN Institute of Geography and Spatial Organization, “Monograph”, No. 3, Warszawa 2002.

#### **4. Natural environment as a source of potential and a guideline for the spa's attractiveness**

Przerzeczyn-Zdrój is surrounded by fields, meadows and small groves. The small Spa Park with a fitness trail, a club/café and a library for patients as well as a pergola and a square for playing chess is characterised both by contrasts in air temperature per 24 hours smaller than those typical of the centre of the spa, a uniform heating and cooling rate and the highest temperature values during nighttime. The walking space surrounding the spa are located in the open. It is also where the increase in air temperature is the most rapid when compared to other areas. On the other hand, the heating rate is the lowest here. The Spa Park is a geometrical structure. It is formed by perpendicular, generally single-species avenues, with rectangular lawn isles in between. The species composition of the Spa Park is unimpressive and includes e.g. the small-leaved lime, the silver maple, the douglas fir and the Norway spruce.

Some noteworthy elements of the environmental potential of the Upper Przerzeczyn include: an earth dike with Lombardian poplars near a pond located in the vicinity of the neoclassicist von Pfeil family palace; the 18th century park surrounding the residence, with plane trees, cucumber trees, black pines and old oaks which form avenues; the English style park in the Lower Przerzeczyn (the part of the village stretching from the Wrocław-Kudowa road to the church) with an area of 3 ha and 200-year-old specimens of tulip trees, purple leaf and cut leaf beeches, yews, Swiss pines, plane trees, oaks, lime trees and Chinese junipers. This makes a total of 49 species, including 24 species of foreign origin.

The Bystrzyca Kłodzka municipality is one of the most forested regions in Poland. The forests cover the area of approximately 154 km<sup>2</sup>, that is, almost 46% of the total municipality area. This has a beneficial impact on the spa's functioning and local climate. The natural environment constitutes the area's greatest potential as regards the broadly understood tourism development. The Bystrzyca Kłodzka municipality contains the Śnieżnik Landscape Park, the Wilczki Waterfall Reserve, 1 protected landscape area, 1 landscape park, 1 nature reserve and 22 natural monuments. There are over 360 km of tourist routes leading through the Śnieżnik Landscape Park.

There are five reserves in the Śnieżnik Landscape Park: "Śnieżnik Kłodzki", "Nowa Morawa", "Puszcza Śnieżnej Białki", "Wodospad Wilczki", and "Jaskinia Niedźwiedzia." There are numerous species of flora and fauna within the park.

One noteworthy area located in the Bystrzyca Kłodzka municipality is the Dzika Orlica – a form of protection included in the Natura 2000 network – a special area of habitat protection (Habitats Directive). It stretches across 539.7 ha. Its formal status has been confirmed by a European Commission Decision. The area includes a fragment of the river valley of the River Dzika Orlica in its upper course and is shaped into a narrow belt.

The protective zone of the Długopole-Zdrój spa contains curative forests representative of the group of special purpose forests.

One particular spa's attraction is the Spa Park subject to general revitalisation (at the cost of over 4 million PLN, with 3 million PLN funded by the European Union) between 2010-2011. As a result, walking avenues have been delineated anew, while the cave with a spring of curative water, the pond with its gazebo, and the amphitheater along with the auditorium have all been reconstructed. One addition includes a wooden platform with a pergola, fountain and a place to rest. The new lighting has also been installed along with benches and vegetation enhancing the charm of this part of the spa.

## **5. Curative infrastructure**

Part of Przerzeczyn-Zdrój is located outside the residential area, near the borders of the village, not far from the nearby green areas. The spa consists of 4 sanatoriums with 162 beds, a natural therapy resort, a library, a café and a Spa Park with the “Forsycja” (Forsythia) fitness trail (60 lodgings in single and double rooms with a full sanitary unit and superior standard rooms and apartments. One part of the building is two stories high, while another -three stories high. The roof is a shingle hip roof with many dormers. The structure has undergone a complex modernization and is now divided into: the “Akacja” (“Acacia”) sanatorium, with single, double and triple rooms, a full sanitary unit and basic standard rooms without full sanitary units. A natural therapy resort is located in the sanatorium. The building is prewar, two-story-high, with a shingle pitched roof); and the “Buk” (“Beech”) sanatorium, with single, double and triple rooms, a full sanitary unit and basic standard rooms without full sanitary units. The entire prewar building is three stories high and has a converted loft, its roof being shingle pitch. The interior of the building has, too, been renovated (the exterior elevation and the roof require renovation). Next, there is also the “Cis” (“Yew”) sanatorium

(with single, double, triple and quadruple rooms, basic standard, without full sanitary units and rooms with full sanitary units situated in the prewar building with a basement, two stories and a converted loft. The roof (in need of renovation) is a shingle pitched roof with a large dormer on the front side. The „Jasiek” apartment is a single building with single and double rooms with full sanitary units.

The spa offers a state-of-the-art pool for rehabilitation and treatment (12m × 5.5m and maximum depth of 1.5 meters), fully adapted for the disabled. It is also equipped in hydro massage and hydro/water massage units, a unit for upstream swimming and cumulative massage, and two upper stream units for neck massages with an automated time counter which switches between the upper, lateral and bottom jets.

Due to the relatively small number of curative infrastructure buildings in the village, its residents offer accommodation to tourists in private houses, especially the new ones. The largest number of such new structures is located along the National Road 8 to Wrocław.

The curative infrastructure of Długopole-Zdrój includes a few noteworthy structures, usually monuments, including: the “Dąbrówka” Spa Hospital (from 1819, one of the first spa buildings in Długopole-Zdrój. Until the 19th century it served as a Spa House with a hotel section, a treatment section and a dance hall and café. It was located along the first promenade. In the afternoons the spa orchestra would play right next to it. The structure underwent a general modernisation in 2011); the “Ondraszek” Spa Hospital (a comfortable sanatorium with 55 lodgings in double and triple rooms which underwent a complex renovation in 2000). The building is adapted to the needs of the disabled. It contains a hall for individual gymnastics and a local cryotherapy unit); the “Mieszko” Spa Hospital (raised in 1881 as the “Villa Urban,” in the 1920s used by the Congregation of the Sisters of the Sacred Heart of Jesus); the “Fortuna” sanatorium (from 1830 on serving as a “bath facility” with rooms for treatment and the interior renovated in 1872 into a comfortable pension with 32 rooms. Currently, the sanatorium’s former look and name have been restored); the “Zbyszko” recreational house (from 1826, reconstructed in 1881. It is a building very high as for the village standards, with a large viewing balcony facing the Wronki mountain. In its prewar, glory times it offered its guests 32 rooms, a renowned confectionery, a drug store and a Berlin Kampfmayer wine store. Renovated and adapted into

the “Metalowiec” sanatorium after the second world war, the house currently functions as the private “Zbyszko” recreational centre).<sup>18</sup>

In regard of the village standards, the structures having a major role in the proper functioning of the spa also include the “Horus” café (1893), the “Zdrojowa” café (1840) and the post office (1876).

## 6. Other and new functions in the spa town

Contemporary times demand multifunctionality. A spa would prove non-competitive and underdeveloped within market economy conditions when relying on an exclusively curative offer. That is why it is important to develop new functions that would attract not only patients, but the potential tourist in the broadest sense of the term.

The Przerzeczyn-Zdrój spa should make use of already functioning examples related to multifunctionality in other rural spas, e.g. Długopole-Zdrój or Solec-Zdrój<sup>19</sup> as well as those found in small cities, e.g. Kudowa-Zdrój, Polanica-Zdrój, Łądek-Zdrój in which extra-curative functions are becoming increasingly important. This involves the creation of renewal centres of the spa and wellness sort and centres for sports and recreation as well as sports-related and recreational facilities. The cultural potential of the village itself as well as its close vicinity has already been acknowledged. There is a number of touristically interesting structures in Przerzeczyn itself (providing possibilities for exploration) including: the 15th century Gothic parish church of the Black Madonna of Częstochowa, the Queen of Poland, transformed between 1729-33 into a baroque structure, with a mannerist altar from 1640, a baroque pulpit and organs from the 18th century;

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<sup>18</sup> E. Gonda-Soroczyńska, K. Przybyła, *Możliwości i ograniczenia rozwoju uzdrowiska wiejskiego na przykładzie Długopola-Zdroju (The possibilities and limitations for the development of a rural spa using the example of Długopole-Zdrój)*, in: *Podaż turystyczna jako determinanta kształtowania popytu turystycznego (Tourist supply as a determinant of the development of tourist demand)*, Zeszyty Naukowe No. 701, Ekonomiczne Problemy Usług No. 86, Szczecin University, Szczecin 2012, pp. 249–264.

<sup>19</sup> E. Gonda-Soroczyńska, *Przestrzeń uzdrowiskowa w krajobrazie kulturowym wsi na przykładzie uzdrowiska Solec-Zdrój (Curative space in the cultural landscape of a village using the example of the Solec-Zdrój spa)*, *Infrastruktura i Ekologia Terenów Wiejskich (Rural area infrastructure and ecology)*, Vol. 1, Polska Akademia Nauk, The Rural Technical Infrastructure Commission, Kraków 2011, pp. 39–49.

renaissance and baroque epitaphs (the external walls contain one of the largest epitaph complexes in Silesia with 41 renaissance and baroque epitaphs from 1552–1617); a picturesque gorge of the river Ślęza with cascades, rapids and small waterfalls; a 19th century palace surrounded by the picturesque neo-renaissance landscape park; the historical city of Niemcza, Wojsławice near Niemcza with one of the most beautiful Polish arboretum (rhododendrons); the Tatarska Valley (a long gully stretching for a number of kilometers with a stream; the fortified settlement in Gilów).

The rich environmental values found in the entire Niemcza County may also be explored using delineated educational-environmental routes. One noteworthy example is the “Ligota Mała-Przerzeczyn Zdrój” Environmental-Educational Route and the “Dolina Tatarska” Environmental-Educational Route by the road leading from Niemcza to Dzierżoniów.<sup>20</sup> Tourists and patients might also use a cycling route which starts at Przerzeczyn-Zdrój, i.e. the red route of Przerzeczyn Zdrój – Podlesie – Niemcza – Gilów – Piława Górna – Ligota Mała – Przerzeczyn Zdrój.

There is a number of tourist routes in the Owl Mountains and the Niemcza-Strzelin Hills, two of which lead through the Niemcza municipality. These include the yellow and black tourist route.

The environmental-educational and cycling routes serve to show that other new functions that are extra-curative are slowly being introduced in the spa. Some additional new functions are to be expected following the construction of a new sanatorium-hospital complex, mainly those related to the services offered within.

The Długopole-Zdrój spa followed the path of spa and wellness. The luxurious SPA Medical Hospital “Elisa’s Mansion” replaced the former sanatorium. The building is a monument from 1875–1876. It was on the brink of ruin in 1986 and had been sold to a private investor in 2005, who sold it again to a private company in 2007. The new owner transformed the building into the new “Elisa’s Mansion” SPA Medical Hotel combined with a well-equipped renewal centre.

The sports and recreation function is being developed as part of the multifunctional approach. There are centres in the town with sports structures at their disposal. One example is the “Relax” recreational centre or the “Silesia” vacation centre. Their visitors can use an indoor and outdoor swimming pool,

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<sup>20</sup> *The Niemcza Municipality Tourist Information Booklet from 2012.*

a jacuzzi, a sauna, an exercise room, as well as sports fields for soccer, volleyball and basketball.<sup>21</sup>

To summarize, one might say that the only prominent function in Długopole-Zdrój is the curative function and the one pursued by the “Elisa’s Mansion,” which functions as a spa and wellness centre. There are lodgings available in pensions and single-family houses with no additional attractions. Certain establishments allegedly offering “agritourism” services in fact involve only accommodation, recreational equipment and a place to light a fire.

## **Summary**

The development of tourism in the area of curative municipalities requires the realisation of goals established in the Tourism Development Strategy Project, which include: creating and developing competitive tourist products (ensuring the sufficient quantity and quality of natural resources for recreational and extra-recreational needs, especially water resources for the diverse manner of their utilization); formulating and implementing mechanisms and tools which influence the improvement of the quality of the tourist product; developing the infrastructure related to gastronomy and accommodation; developing the infrastructure related to tourist attractions; supporting the development of curative, medical, rehabilitative and wellness type tourism; supporting the development of agritourism. Agritourism in its broadest sense plays a significant role in social development and the activation of rural areas. One should work towards increasing the dynamics of developing rural areas and diversifying them with the use of extra-agricultural activities pursued in these areas. Agritourism may become a specific, distinct form of tourism in the state, provided that the original cultural and environmental character of the Polish village is retained.

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<sup>21</sup> E. Gonda-Soroczyńska, E. Przybyła, *Możliwości i ograniczenia...*

## Final conclusions

The following final conclusions have been drawn as a result of the conducted research:

1. Rural spa centres may be evaluated in the context of their attractiveness, similarly to those in small and large cities.
2. The (environmental) guidelines described in the study may be used for the purpose of conducting this evaluation.
3. Establishing a model for the attractiveness of rural spas would be essential in the evaluation of their attractiveness.
4. The attractiveness model for rural spas would be very helpful for potential future investors who might use it to draw the proper conclusions regarding the justification of pursuing certain investments.
5. Rural curative centres should ensure their development through the reconstruction and modernization of the curative infrastructure, the modernization of the technical infrastructure, the revitalization and enlargement of organized green areas, the introduction of spa multifunctionality, and by broadening their curative and touristic offer.
6. Rural spas showcasing extraordinary environmental potential (especially curative mineral waters and other curative materials) should improve their image and ensure that it is properly promoted and popularized.
7. The studied rural spas require the modernization of certain existing hospitals and sanatoriums. They also need to adjust all spa treatment structures to European Union standards, provide additional professional curative and rehabilitative equipment, modernize and improve the aesthetic condition of neglected structures related to supplementary spa treatment services, as well as modernize the existing heating systems.

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## ATRAKCYJNOŚĆ TURYSTYCZNA UZDROWISK WIEJSKICH NA PRZYKŁADZIE PRZERZECZYNA-ZDROJU I DŁUGOPOLA-ZDROJU

### Streszczenie

W przeprowadzonych badaniach dokonano próby oceny atrakcyjności wiejskich uzdrowisk na przykładzie dwóch dolnośląskich wsi, tj. Przerzeczyzna-Zdroju i Długopola-Zdroju. Postawiono pytanie „Czy uzdrowisko wiejskie można oceniać w kontekście atrakcyjności podobnie jak miejskie? Jakiego można zastosować wyznaczniki tej oceny? Wstępnie określono elementy decydujące o atrakcyjności uzdrowiska, wśród których wymieniono: usytuowanie uzdrowiska w kontekście ważnych ciągów komunikacji kołowej, kolejowej, autobusowej (dostępność komunikacyjna); usytuowanie topograficzne; klimat zdrowotny (lecniczy); występowanie leczniczych surowców (lecnicze wody mineralne, borowiny, inne); zabiegi lecznicze (rodzaje); miejsca noclegowe w sanatoriach, szpitalach uzdrowiskowych, hotelach, pensjonatach, motelach, zajazdach; pijalnie wód leczniczych; dom zdrojowy; tereny zielone (w tym Park Zdrojowy, lasy); amfiteatr; muszla koncertowa; Teatr Zdrojowy; restauracje, kawiarnie, bary, inne punkty gastronomiczne; atrakcje turystyczne; inne funkcje oprócz uzdrowiskowej; infrastruktura turystyczna poza uzdrowiskową; rodzaje leczonych schorzeń; spójność architektoniczno-urbanistyczna obiektów uzdrowiskowych; infrastruktura komunalna; jakość środowiska.

**Słowa kluczowe:** wieś, Przerzeczyn-Zdrój, Długopole-Zdrój, uzdrowisko, funkcja uzdrowiskowa, atrakcyjność, wielofunkcyjność

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**THE NEGATIVE EFFECTS OF TOURISM DEVELOPMENT  
IN THE PERCEPTION OF RESIDENTS  
OF DIFFERENT TYPES OF RURAL COMMUNITIES**

**Abstract**

The main objective of the article is to determine the perception of negative effects of tourism development observed among the residents of different types of rural communities. In the paper, it is assumed that negative effects of tourism development can be perceived by the residents of tourist resorts from the economic, social, cultural and environmental points of view. Having verified previously taken hypotheses, it has been found out that significant statistical differences observed in the perception of tourism development among the residents of different types of rural communities merely concern goods and services prices rise, which appears to be the only negative effect of tourism development perceived by the residents of the particular community. Furthermore, no statistically important relationship between the influence of tourism development on the respondents' income and their perception of its negative effects analysed here, has been found.

**Keywords:** residents' attitudes, host perceptions, rural tourism, local community

**Introduction**

In Poland, sustainability is considered to be one of the basic principles of the government's policy towards the development of agriculture and rural areas. In principle, it assumes multi-functionality, however a significant role has

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also been assigned to tourism since, as the economic, social, cultural and environmental phenomenon, it displays numerous factors stimulating regional and local development. Most frequently, it is perceived through the lens of economic profits gained by local accommodation providers, local communities as well as local authorities.

It has been observed that among the effects of tourism development presented in literature, there are some of economic character, but also those showing non-economic character which, in fact, should not be considered to be less important. It must be also emphasized here that the above mentioned effects can have either a positive or negative dimension for the development of a local area as well as for all the local stakeholders. The possibility of getting some measurable income by local service providers as well as by other countrymen, stimulation of economic initiatives, creation of new workplaces together with increasing women's professional activity, represent these positive effects of tourism development that are of economic character. However, tourism development can also lead to some negative phenomena, such as seasonality of services and temporary price rise of goods and services. Such issues as the ability of reaching a higher social position by countrymen, improving their lifestyle, maintaining local customs and traditions, getting opened to the world can definitely be described as positive effects of tourist development found in social and cultural areas. Unfortunately, there are some likely drawbacks of tourism development that must be mentioned such as commercialization of customs and traditions, polarisation of local communities or devastation of natural environment.

Apart from the tourist attractiveness of a particular area, its residents' willingness for providing tourist services, support received from local authorities and any other institutions popularizing tourism development in certain places, the attitude of local residents themselves shown towards the visitors to their community seems to be a vital factor influencing a tourism development process. Guests visiting a particular tourist site will feel much more comfortable and relaxed if they see the acceptance shown by the locals or, on the contrary, they are very likely to feel great discomfort if they notice the lack of such acceptance. It must be also emphasized that in the future, local residents themselves are very likely to become providers of the services indirectly connected with the presence of tourists. Hospitality of a tourist destination can be considered as two different grounds - a hospitable space or a hospitable community. J. Kaczmarek, A. Stasiak, B. Włodarczyk define the hospitable space as the way of developing

the area in such a way that would enable a safe and comfortable stay of the visitors and they also associate the arrangement of a tourist destination space with the local residents' attitudes. They do it by means of the hospitality formula<sup>1</sup> they created. Therefore, it can be assumed that if the higher proportion of local residents show care and assistance towards the visitors, the more hospitable the certain local community is. As the above considerations show, the hospitality of a tourist destination is the resultant of the area development level and the local residents' attitudes.

Thus, the main aim of the article is to determine the perception of negative effects of tourism development shown by the residents of various types of rural communities. In the paper, it was assumed that negative effects of tourism development can be perceived by the residents of tourist resorts from economic, social, cultural and environmental points of view. Therefore, in this paper, three research hypotheses were put forward to be verified later with the use of Spearman's rank correlation coefficient, which describes the dependence between two variables using a monotonic function, and ANOVA Kruskala-Wallis test.

The article is organised as follows: a review of the literature; an explanation of the methodology corresponding to the presented empirical research; results and discussion with main conclusions.

## **1. Residents' perception of tourism – literature review**

Perception of tourism shown by the residents of tourist resorts has been recognized and described relatively well in literature. The research concerning host-guest relations goes back as far as to the late 60s (1960s).<sup>2</sup> As the research results show, local residents' attitudes towards tourists can significantly determine the level of satisfaction or dissatisfaction of the holiday trip made by the latter.<sup>3</sup> Each local community seems to consist of residents who show a very positive at-

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<sup>1</sup> J. Kaczmarek, A. Stasiak, B. Włodarczyk, *Hospitable space – a few remarks on the competitiveness of regions*, in: *Tourism as the stimulating factor of the competitiveness of regions in times of globalization*, ed. G. Gołembski, Akademia Ekonomiczna, Poznań, 2008, pp. 136–150.

<sup>2</sup> R. Sharpley, *Host perceptions of tourism: A review of the research*, "Tourism Management" 2014, No. 42, pp. 37–49.

<sup>3</sup> *Ibidem*.

titude towards tourism development as well as of the ones who totally disapprove of this process. However, between these two extreme ones, there are numerous groups that consist of the residents who are unable to express their precise attitude towards tourism development.<sup>4</sup> Social Exchange Theory<sup>5</sup> is the means most frequently used to explain local residents' attitude towards tourists. According to the above mentioned theory, an individual is aiming at profit maximisation, the chance for which appears in particular social situations, and is willingly taking part in the exchange process if the expected profits exceed costs. Therefore, in the analysed case, it means that the residents are very willing to express their positive attitude towards the visitors if they perceive such behaviour as something that is likely to bring them profits higher than costs.<sup>6</sup> However, it must be emphasized that residents' attitude towards tourists and tourism development in the area of their residence is not permanent and shows the tendency to undergo changes as time goes by. Allen et al. (1988) found that residents' perception of tourism impacts became less positive as the level of tourism in a community increased.<sup>7</sup>

The results of empirical studies conducted by numerous researchers allowed to determine a set of variables which appear to influence the perception of the effects of tourism development. Most frequently, they are presented as two separate groups, i.e. extrinsic variables and intrinsic variables. The group of extrinsic variables, which significantly affect the residents' attitudes towards tourism development and the tourists themselves, includes, among others,

<sup>4</sup> K. Andritios, V. Vaughan, *Urban residents' attitudes toward tourism development: the case of Crete*, "Journal of Travel Research" 2003, No. 42 (2), pp. 172–185; E. Perez, J. Nadal, *Host community perceptions: a cluster analysis*, "Annals of Tourism Research" 2005, No. 32 (4), pp. 925–941.

<sup>5</sup> C. Jurowski, D. Gursoy, *Distance effects on residents' attitudes toward tourism*, "Annals of Tourism Research" 2004, No. 31 (2), pp. 296–312; K. Andereck, K. Valentine, R. Knopf, C. Vogt, *Residents' perceptions of community tourism impacts*, "Annals of Tourism Research" 2005, No. 32 (4), pp. 1056–1076; B. Bestard, R. Nadal, *Attitudes toward tourism and tourism congestion*, "Region et Developpment" 2007, No. 25, pp. 193–207; Y. Wang, R. Pfister, *Residents' attitude toward tourism and perceived personal benefits in a rural community*, "Journal of Travel Research" 2008, No. 47 (1), pp. 84–93; R. Nunkoo, D. Gursoy, *Residents' support for tourism: an identity perspective*, "Annals of Tourism Research" 2012, No. 39 (1), pp. 243–268.

<sup>6</sup> P. Látková, A. Vogt, *Residents' Attitudes toward Existing and Future Tourism Development in Rural Communities*, "Journal of Travel Research" 2012, No. 51 (1), pp. 50–67.

<sup>7</sup> L. Allen, P. Long, R. Perdue, S. Kieselbach, *The impact of tourism development on residents' perceptions of community life*, "Journal of Travel Research" 1998, No. 27 (1), pp. 16–21.

the level (stage) of tourism development,<sup>8</sup> the type of tourism being developed and the type and number of tourists deciding to visit a particular destination.<sup>9</sup> Moreover, perceptions of tourism are found to vary according to seasonality and national stage of development. The less economically developed the destination, the more positively are the opportunities presented by tourism perceived.<sup>10</sup> Empirical studies show that statistically important intrinsic variables include demographic features, such as: age, sex and education level.<sup>11</sup> Moreover, some correlation has been found to exist between residents' social status and the extent to which they identify themselves with the destination.<sup>12</sup> As Cui and Ryan (2011)<sup>13</sup> demonstrated, the relationship between place attachment and tourism has been seen differently by urban and rural residents, with rural areas expressing more concern. Also contact or interaction with tourists has been found to be correlated positively with support for tourism, though it may also depend on the type of tourists and the frequency of the contacts.<sup>14</sup> As the results of studies conducted

<sup>8</sup> A. Leep, *Attitudes towards initial tourism development in a community with no prior experience: the case of Bigodi, Uganda*, "Journal of Sustainable Tourism" 2008, No. 16 (1), pp. 5–22; A. Vargas-Sanchez, M. Plaza-Mejia, N. Porrás-Bueno, *Understanding residents' attitudes toward the development of industrial tourism in a former mining community*, "Journal of Travel Research" 2009, No. 47 (3), pp. 373–387.

<sup>9</sup> J. Johnson, D. Snepenger, S. Akis, *Residents' perceptions of tourism development*, "Annals of Tourism Research" 1994, No. 21 (3), pp. 629–642; B. Bestard, R. Nadal, *Attitudes toward tourism and tourism congestion*, "Region et Développement" 2007, No. 25, pp. 193–207; A. Vargas-Sanchez, N. Porrás-Bueno, M. Plaza-Mejia, *Explaining residents attitudes to tourism: is a universal model possible?*, "Annals of Tourism Research" 2011, No. 38 (2), pp. 460–480.

<sup>10</sup> A. Leep, *Residents' attitudes toward tourism in Bigodi village, Uganda*, "Tourism Management" 2007, No. 28 (3), pp. 876–885.

<sup>11</sup> P. Mason, J. Cheyne, *Residents' attitudes to proposed tourism development*, "Annals of Tourism Research" 2000, No. 27 (2), pp. 391–411; C. Tosun, *Host perceptions of impacts: a comparative tourism study*, "Annals of Tourism Research" 2002, No. 29 (1), pp. 231–253; C. Huh, C. Vogt, *Changes in residents' attitudes toward tourism over time: a cohort analytical approach*, "Journal of Travel Research" 2008, No. 46 (4), pp. 446–455.

<sup>12</sup> R. Nunkoo, D. Gursoy, *Residents' support for tourism: an identity perspective*, "Annals of Tourism Research" 2012, No. 39 (1), pp. 243–268; A. Palmer, N. Koenig-Lewis, L. Jones, *The effects of residents' social identity and involvement on their advocacy of incoming tourism*, "Tourism Management" 2013, No. 38 (1), pp. 142–151.

<sup>13</sup> X. Cui, C. Ryan, *Perceptions of place, modernity and the impacts of tourism – Differences among rural and urban residents of Ankang, China: A likelihood ratio analysis*, "Tourism Management" 2011, No. 32 (3), pp. 604–615.

<sup>14</sup> K. Andereck, K. Valentine, R. Knopf, C. Vogt, *Residents' perceptions of community tourism impacts*, "Annals of Tourism Research" 2005, No. 32 (4), pp. 1056–1076.

by other researchers show, the greater proximity to the tourism zone, the more negative are perceptions of tourism.<sup>15</sup>

As it can be seen from this literature review, perception of effects of tourism development as well as the attitude towards tourists are determined by numerous variables. Broader review of appropriate literature concerning these aspects was done by R. Sharpley (2014).<sup>16</sup>

## 2. Rural communities typology – short description of methodology

Three basic factors influencing tourism development have been considered in order to present the typology of rural communes:

- commune's economic and social situation,
- commune's resourcefulness,
- commune's tourist attractiveness.

Tourism development in a particular type of a commune, especially its economic and social effects, strictly depend on mutual relationships taking place between the three above mentioned factors, however a crucial issue is not only if a particular tourism development factor acts as its stimulant or not, but also what kind of relationship it shows towards the remaining factors of tourism function development.

Each factor has been expressed by means of an aggregate indicator. In order to assess economic and social resources, the development level indicator has been created (WPR), for commune's resourcefulness assessment, the resourcefulness indicator (WZF) has been used and finally, for tourist attractiveness assessment, the tourism development indicator (WRT) has been applied. The components of development level indicator are showed in Table 1 Tourism development aggregate indicator's structure is showed at Table 2.

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<sup>15</sup> C. Raymond, G. Brown, *A spatial method for assessing resident and visitor attitudes towards tourism growth and development*, "Journal of Sustainable Tourism" 2007, No. 15 (5), pp. 520–540; B. Sharma, P. Dyer, *An investigation of differences in residents' perceptions on the Sunshine Coast: tourism impacts and demographic variables*, "Tourism Geographies: An International Journal of Tourism Space, Place and Environment" 2009, No. 11 (2), pp. 187–213.

<sup>16</sup> R. Sharpley, *Host perceptions of tourism: A review of the research*, "Tourism Management" 2014, No. (42), pp. 37–49.

Table 1

Development level indicator's structure (WPR)

Development Level Indicator (WPR)	Sub-indicators
Social component	migration attractiveness indicator
	% of the community using water supply and sewerage networks
Economic component	commune's budget expenditure per capita
	commune's own income per capita
	enterprise indicator
	% of the registered unemployed per the total number of inhabitants in productive age

Source: based on literature review.

Table 2

Tourism development aggregate indicator's structure (WRT)

	Sub-indicators
WRT	intensity of tourist activity indicator (Schneider's)
	a place's tourist function indicator (Baretje's and Defert's)
	tourist function indicator (Defert's)
	accommodation development indicator
	accommodation accessibility indicator
	forests
	parks and greenery
	cultural attractiveness indicator
	businesses registered in the national economy register REGON in section H per 1000 people in productive age
	expenditure on culture and national heritage protection per capita

Source: based on literature review.

The resourcefulness indicator (WZF) has been calculated as follows:

$$WZF = \frac{p}{L} - \frac{s + d}{L}$$

where:

*p* – stands for share in taxes being the part of state budget income,

*s* – stands for general subsidies,

*d* – stands for budget grants in total,

*L* – stands for a number of inhabitants

If the above mentioned indicators happen to express positive values, these indicators are described as tourism development stimulants, however if their

values drop and become negative, they are considered to be the ones that hamper tourism development in a commune.

With regard to the next stage of presenting rural areas typology, it is not important to decide if the particular indicators depicting tourism development factors show stimulating or hampering character, because at this point, these indicators show some exact values. Such a situation allow to create four empirical typological groups. The main criterion used for including a commune into a particular group is the relationship between the values showed by particular aggregate indicators. On this basis, the following 4 groups have been distinguished:

1. Well-developed communes with a dominating non-tourist function  $WZF > WPR > WRT$ .<sup>17</sup>
2. Averagely developed communes where a tourist function is significant  $WZF > WPR \geq WRT$ .
3. Poorly developed communes but with tourist potentials  $WZF < WPR \leq WRT$ .
4. Very poorly developed communes of non-tourist character  $WZF < WPR < WRT$ .

The suggested division into four empirical typological groups corresponds with the division into integrated rural areas, in between rural areas and peripheral rural areas. Thus, it can be assumed that the communes that are:

1. Well-developed with a dominating non-tourist function  $WZF > WPR > WRT$  represent integrated rural areas and later in the article will be referred to as “satellite communes” (Osielsko commune).
2. Averagely developed where a tourist function is significant  $WZF > WPR \geq WRT$  represent in between rural areas with a developed tourist function and later in the article will be referred to as “star communes” (Miasteczko Krajeńskie commune, Przechlewo commune, Dragacz commune).
3. Poorly developed but with tourist potentials  $WZF < WPR \leq WRT$  represent in between rural areas with a non-developed tourist functions, but showing tourism development potentials and later in the article will be referred to as “aspiring star communes” (Liniewo commune, Lipka commune).

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<sup>17</sup> The used pattern means that the value of commune’s resourcefulness indicator (WZF) for this type of communes is higher than the values of the development level indicator (WPR) and the tourism development indicator (WRT).

4. Very poorly developed of non-tourist character WZF < WPR < WRT represent peripheral rural areas and will be referred to as “stone communes” (Czernikowo commune, Chrostkowo commune).<sup>18</sup>

### **3. Methodology of the research**

The main objective of the article is to determine the perception of negative effects of tourism development observed among the residents of different types of rural communities. The assumption is that the negative effects of tourism development can be perceived by the residents of tourist resorts from the economic, social, cultural and environmental points of view. Therefore, in the survey, the residents of particular types of communities were asked to express their opinions on perception of negative effects of tourism development with particular respect to the following phenomena: goods and services price rise (economic dimension), the fact that only accommodation providers become rich (social and cultural dimension, polarisation), and degradation of natural environment.

The paper takes into consideration the following hypotheses:

H<sub>1</sub> lack of statistically significant influence of the features determining the community type on the residents' perception of goods and services price rise as the negative effect of tourism development.

H<sub>2</sub> lack of statistically significant influence of the features determining the community type on the residents' perception of the fact that only accommodation providers become rich as the negative effect of tourism development.

H<sub>3</sub> lack of statistically significant influence of the features determining the community type on the residents' perception of natural environment degradation as the negative effect of tourism development.

In order to verify the presented above hypotheses, empirical research was carried out among the residents of various types of communities, and then, the obtained results were analysed. The research was conducted among the residents of the communities representing particular community types, on random sample of 1000 people of working age. In relation to the total number of people inhabiting the mentioned communities, which is 32,048 *in toto*, the research concerned

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<sup>18</sup> J. Kosmaczewska, *Tourism as a factor in the development of rural areas*, Bogucki Publishing, Poznań 2013.

only 3.12% of all the residents of working age. In order to determine the sample size, the formula for minimum sample size was applied where the fraction was assumed to be on the level of 50%, the confidence coefficient on the level of 0.95 and the maximum standard error on the level of 3.15%. Then, the sample was divided into categories considering the total number of working age people living in the community. The effects are presented in the table below.

Table 3

## Methodology of selecting the sample for the research

	Community type							
	satellite	star			aspiring star		stone	
	Osielsko	Miasteczko Krajęskie	Przechlewo	Dragacz	Liniewo	Lipka	Czernikowo	Chrostkowo
Number of working age residents according to BDL GUS (Central Statistical Office of Poland)	7486	2094	4038	4662	2901	3584	5431	1852
Sampling frame share expressed in %	23	7	13	15	9	11	17	6
Minimum sample size for n = 1000	234	65	126	145	91	112	169	58
Number of the surveyed residents	234	65	126	145	91	112	169	58
Number of the surveyed residents in particular types of communities	234	336			203		227	

Source: GUS (Central Statistical Office of Poland).

Next, the surveyed population was divided into categories according to such features as age and sex. In order to verify the appropriateness of the survey and find out how well the qualified interviewers were prepared to conduct it, the right survey was preceded by the mock survey.<sup>19</sup> Due to the lack of regular distribution of the obtained data, necessary for the statistical analysis, ANOVA Kruskala-Wallis test was used, and in the case of obtaining statistical significance,

<sup>19</sup> The research was conducted in 2011 by Bio-Stat, an experienced research company, with the use of CATI technique (Computer Assisted Telephone Interviewing).

multiple comparison tests were applied. Additionally, in descriptive analyses, number and percentage indicators were used.

#### 4. Results

The value of the test statistics of ranks obtained by means of ANOVA Kruskala-Wallis test,  $H(3, N = 1000) = 15.856$ ;  $p = .0012$  allows to reject  $H_0$  and take the alternative hypothesis assuming that there exists a statistically significant impact of the features determining a community type on goods and services price rise perception as the negative effect of tourism development. As the results presented in the Figure 1 show, the perception of goods and services price rise as the negative effect of tourism development was most frequently pointed out by the residents of stone type communities, that is, ones where the level of tourism development seems to be the lowest of all the analysed community types.

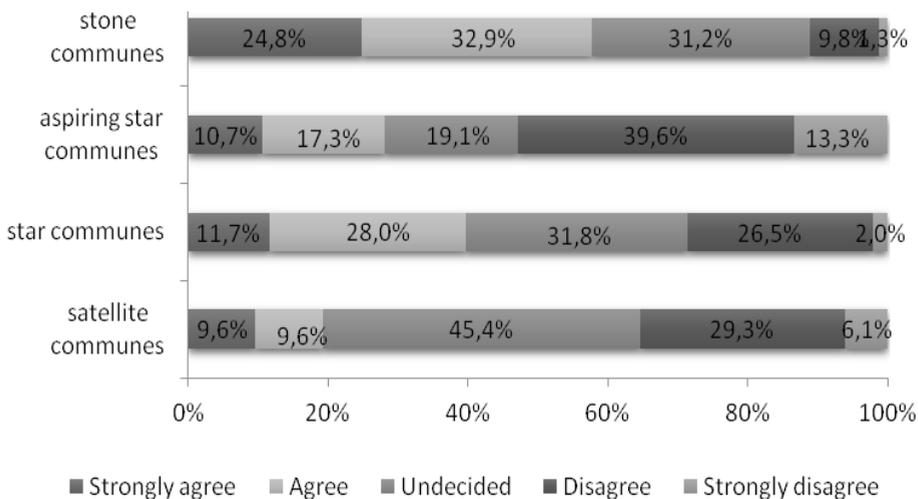


Fig. 1. Percentage distribution of the respondents' answers – goods and services price rise

Source: own research.

The results of multiple comparison tests demonstrate that the statistically significant differences between the answers given by the residents of two extreme community types: satellite and stone, are responsible for  $H_0$  rejection. The respondents from the satellite communities much more frequently (29.3%) than those inhabiting the stone type communities (9.8%) disagree with the opinion that tourism development is likely to cause goods and services price rise. However, the lowest result concerning the above mentioned negative effect of tourism development has been observed in the responses given by the inhabitants of the aspiring stars community types, that is, the ones which would willingly become tourist destinations.

Table 4

Value of  $p$  obtained in multiple comparison test of ranks with the use of ANOVA Kruskal-Wallis test concerning goods and services price rise as the result of tourism development for the variable grouping a community type.

	Satellite communes	Star communes	Aspiring star communes	Stone communes
Satellite communes		1.000000	0.108885	0.001692*
Star communes	1.000000		1.000000	0.053072
Aspiring star communes	0.108885	1.000000		1.000000
Stone communes	0.001692*	0.053072	1.000000	

\* statistically significant differences observed between various groups ( $p < 0.05$ )

Source: own research.

Additionally, the results of Spearman's test of ranks show that the perception of goods and services price rise as the negative effect of tourism development appear not to depend on education level ( $p = -0.002$ ) or sex ( $p = 0.019$ ) of the respondents, but only on their age ( $p = 0.097$ ). The older the respondents, the more frequently they agree with the opinion that tourism development causes goods and services price rise.

Although a brief analysis of the survey's percentage results suggests that the residents of stone type communities most frequently agree with the opinion that tourism development brings significant profits only to accommodation providers and makes them richer (46.1% strongly agree and agree), a statistical analysis  $H(3, N = 1000) = 4.017672$ ;  $p = 0.2596$  does not give any basis to reject  $H_0$ . Therefore, it must be assumed that perceiving the phenomenon

of only accommodation providers getting rich as the negative impact of tourism development, does not depend on the features determining the community type the respondents reside.

Therefore, having analysed the responses given by all the respondents (N = 1000) it can be observed that 25.1% agree or strongly agree 12.1%, that tourism development in their community brings visible profits only to accommodation providers. The analysis of the obtained results shows that perceiving the fact of only accommodation providers getting rich as the negative effect of tourism development is affected neither by the respondents' age ( $p = 0.041$ ), education level ( $p = -0.017$ ) nor by their sex ( $p = 0.005$ ).

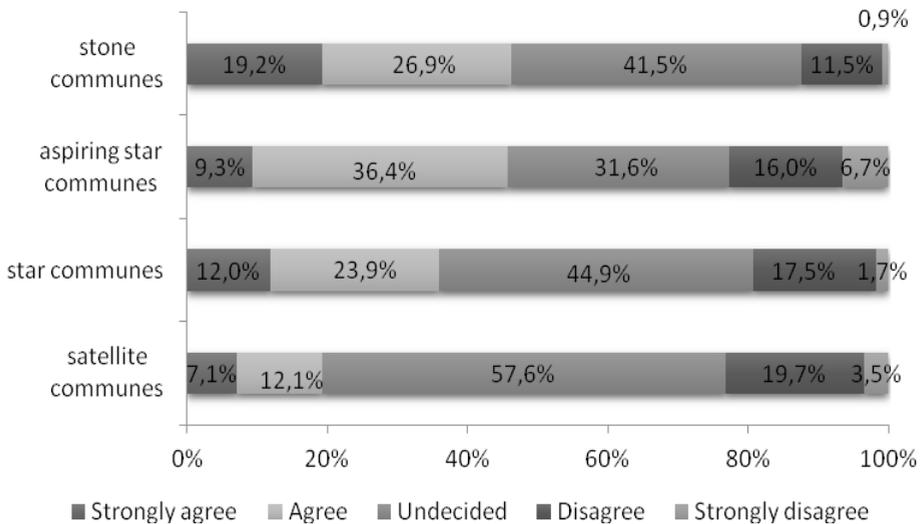


Fig. 2. Percentage distribution of the respondents' answers – only accommodation providers getting rich

Source: own research.

The above discussed analyses also demonstrate the lack of statistically significant influence  $H(3, N = 1000) = 7.408878; p = 0.0599$  of the features determining the community type on their residents' perception of natural environment degradation as the negative effect of tourism development. However, the natural environment degradation perceived as the negative effect of tourism development appears to be treated by the majority of the respondents in a relatively gentle way, since 44.1% of them disagreed with the suggestion that tourism development

might cause natural environment degradation in their community. The analysis of the results does not find the perception of natural environment degradation as the negative effect of tourism development to be affected by the respondents' age ( $p = 0.052$ ), education level ( $p = -0.029$ ) or sex ( $p = -0.004$ ).

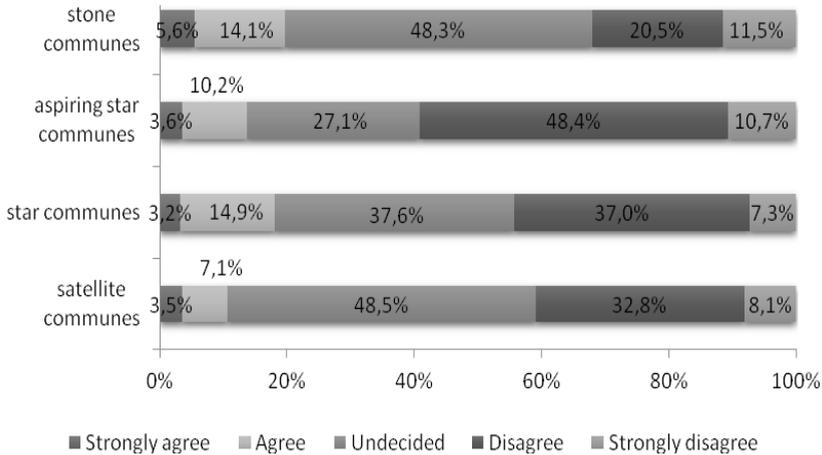


Fig. 3. Percentage distribution of the respondents' answers – natural environment degradation

Source: own research.

In the article, the relationship between the perception of negative impact of tourism development and the respondents' readiness for opening up tourist services-related enterprises has also been analysed. In addition, a statistically significant dependence has been found out. The more interested in opening up enterprises servicing tourists the respondents seemed to be, the more frequently they perceived the negative effects of tourism development such as: goods and services price rise ( $p = 0.233$ ), only accommodation providers getting rich ( $p = 0.202$ ) and natural environment degradation ( $p = 0.084$ ).<sup>20</sup> On the other hand, no relationship between tourism influence on the level of the respondents' income and their perception of the above analysed negative effects of tourism development has been observed.<sup>21</sup>

<sup>20</sup> Correlations are significant with  $p < 0.05$ .

<sup>21</sup> Goods and services price rise ( $p = 0.043$ ), only accommodation providers getting rich ( $p = 0.050$ ) and natural environment degradation ( $p = 0.037$ ), at significance level with  $p < 0.05$ .

## Conclusion

Some researchers point out that people who profit from tourism development are much more likely, compared to others, to accept the influence tourism has on their environment.<sup>22</sup> The empirical research conducted by the author of this article in 2005 in four communities of the Great Poland Province (sample size – 765 people), showed that the residents' attitude towards tourists is highly affected by their age and education level, but most of all, it appears to be strongly connected with perceiving agritourism as a potential source of the respondents' income.<sup>23</sup> However, the results presented in the article do not seem to confirm the above assumption, since no statistically significant relationship between tourism influence on the level of the respondents' income and their perception of the analysed negative effects of tourism development, has been observed.

The obtained research results are similar to those of Madrigal (1993) where personal economic reliance (defined as dependence of respondent's income on the tourism industry) has been found to be significantly related to positive perceptions of tourism though there is no significant relationship between personal economic reliance and negative perceptions of tourism.<sup>24</sup> However, the relationship between the perception of negative impact of tourism development and the respondents' readiness for opening up tourist services related enterprises has been demonstrated. Besides, the perception of negative effects of tourism development has not appeared to be affected by either sex or education level of rural communities residents. Nevertheless, I. Sikorska-Wolak and J. Zawadka, in their work, observed that the higher the residents' education level, the more positive their attitude towards tourism development<sup>25</sup>. The respondents'

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<sup>22</sup> K. Andereck, K. Valentine, C. Vogt, R. Knopf, *A cross-cultural analysis of tourism and quality of life perceptions*, "Journal of Sustainable Tourism" 2007, No. 15 (5), pp. 483–502; D. Gursoy, C. Chi, P. Dyer, *An examination of locals' attitudes*, "Annals of Tourism Research" 2009, No. 36 (4), pp. 715–734; M. Mika, *Attitudes of local communities towards tourists and tourism development – the example of municipalities in the Silesian Beskid Mountains*, "Prace Geograficzne" 2013, No. 134, pp. 83–100.

<sup>23</sup> J. Kosmaczewska, *Influence of agritourism on a community economic and social development*, Bogucki Wydawnictwo Naukowe, Poznań 2007.

<sup>24</sup> R. Madrigal, *A Tale of Tourism in Two Cities*, "Annals of Tourism Research" 1993, No. 20 (2), pp. 336–53.

<sup>25</sup> I. Sikorska-Wolak, J. Zawadka, *Attitudes of the local community towards the development of rural tourism*, "Folia Pomer. Univ. Technol. Stetin Oeconomica" 2011, No. 288 (64), pp. 93–102.

age turns out to be important only in the case of perception of goods and services price rise as the negative effect of tourism development. The similar situation has been observed in the research conducted by M. Mika according to which the respondents' age appeared to affect the assessment of subjectively felt nuisance of tourism.<sup>26</sup>

However, the main aim of the article is to determine the perception of negative effects of tourism development by residents of various types of rural communities. The obtained results demonstrate that statistically significant differences observed in perception of negative effects of tourism development by residents of various community types, basically concern only the perception of goods and services price rise. Such attitudes are most frequently presented by the residents of the stone type communities where tourism development level appears to be the lowest in all analysed community types. On the other hand, residents of the satellite type communities hardly considered goods and services price rise as the negative effect of tourism development.

Thus, it can be presumed that these statistically significant differences found in the responses given by residents of two extreme community types reflect a general economic situation of these communities. Since the stone type communities are described as very poorly developed of a non-tourist character, and the satellite type communities as well-developed with a dominating non-tourist function, it can be assumed that the respondents are simply unable to distinguish the development factors that affect goods and services price rise other than tourism, especially when the stone type communities residents are said to be more sensitive to any price growth than the residents of other community types. As the results of the research done by Allen et al. (1993) have shown, the relationship between tourism development level and economic development level of a particular community, turns out to have undoubtable influence on residents' attitudes towards tourists and tourism itself. Communities with low tourism development and low total economic activity, as well as communities with high tourism development and high total economic activity, view tourism development

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<sup>26</sup> M. Mika, *Attitudes of local communities towards tourists and tourism development – the example of municipalities in the Silesian Beskidy Mountains*, "Prace Geograficzne" 2013, No. 134, pp. 83–100.

more favourably than communities with low tourism and high economic activity and communities with high tourism development and low economic activity.<sup>27</sup>

Different opinions and attitudes of the residents of selected local municipalities in the Silesian Beskid Mountains - Brenna, Istebna, Ustroń, Wisła – towards tourists and the nuisance of tourism are presented in the research conducted by M. Mika. Also, a place identity plays an active role in influencing residents' attitudes towards tourism with respect to negative and positive tourism impacts.<sup>28</sup>

Summing up, it must be said that residents' attitude towards tourism development in their communities appears to be determined by a number of factors and conditions of economic, social and cultural nature. Therefore, the further analysis of the residents' attitudes towards tourism development with regard to factors describing a community type seems to be necessary and fully justified.

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<sup>27</sup> L. Allen, H. Hafer, P. Long, R. Perdue, *Rural Residents' Attitudes toward Recreation and Tourism Development*, "Journal of Travel Research" 1993, No. 31 (4), pp. 27–33.

<sup>28</sup> S. Wang, H. Xu, *Influence of place-based senses of distinctiveness, continuity, self-esteem and self-efficacy on residents' attitudes toward tourism*, "Tourism Management" 2015, No. 47, pp. 241–250.

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## NEGATYWNE EFEKTY ROZWOJU TURYSTYKI W PERCEPCJI MIESZKAŃCÓW RÓŻNYCH TYPÓW GMIN WIEJSKICH

### Streszczenie

Celem artykułu jest ocena postrzegania negatywnych efektów rozwoju turystyki przez mieszkańców różnych typów gmin wiejskich. W pracy przyjęto, że takie efekty mogą być zauważalne dla mieszkańców miejsc recepcji turystycznej w wymiarze ekonomicznym, społeczno-kulturowym i środowiskowym. W wyniku weryfikacji przyjętych hipotez stwierdzono, że istotne statystycznie różnice w percepcji mieszkańców różnych typów gmin dotyczą jedynie postrzegania wzrostu cen na artykuły i usługi jako negatywnego efektu rozwoju turystyki na terenie gminy. Ponadto nie stwierdzono statystycznie istotnego związku między wpływem turystyki na dochody respondentów a postrzeganiem przez nich analizowanych negatywnych efektów rozwoju turystyki.

**Słowa kluczowe:** postawy mieszkańców, percepcja mieszkańców, turystyka wiejska, społeczność lokalna



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## **SCHOOL TOURISM AS PART OF PHYSICAL EDUCATION IN THE LIGHT OF TOURIST ACTIVITIES DECLARED BY HIGH SCHOOL STUDENTS IN WROCLAW, POLAND**

### **Abstract**

The objective of the study is to recognize the expectations of high school students with regard to various forms of school tourism, and with the school tourism teacher's personality. The study was performed during the second semester of 2009–2010 school year among 250 students of selected high schools in Wrocław, Poland. The method of the diagnostic poll and the questionnaire technique have been applied. Also, a discussion of literature in the field is provided. The results indicate that high schools students are interested in participating in tourism classes over the course of physical education classes, and the interest in tourism is similar for boys and girls. Students share a similar personal profile of a school tourism teacher. They appreciate the sense of responsibility, as well as educational and interpersonal skills. The personal example of a physical education teacher can play a vital role in initiating interest and passion for tourism.

**Keywords:** school tourism, high school, optional classes, teacher's personal profile

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## Introduction

Annual surveys conducted by the Tourism Institute for the Tourism Department of the Ministry of Sport and Tourism are aimed at specifying the features of the Polish children and youth tourist activity. The research has been carried out with a representative statistic sample of Polish citizens aged 15–19 and children under 14 who belonged into the respondents' household. It referred to short- and long-term domestic and foreign departures. The results published in the reports of the Tourism Institute<sup>1</sup> indicate that the participation of children under 14 in domestic tourist trips in 2005–2009 remained steady (42–44%). The lowest rate of participation was observed in 2006 (42%), while the highest in 2008 (46%). The participation of the youth aged 15–19 in the same period amounted to 61–68%. The lowest level was observed in 2005 (61%), whereas the highest in 2008 (68%).

According to the declarations, in 23% of the respondents aged 15–19 in 2009 the lack of tourist activities was a result of conditioned needs. The youth stated that they felt neither willingness nor need to take trips. Only 6% mentioned organizational reasons (they had nowhere to go or nobody to help organize recreation). In the analysed period, the youth's interests changed; in 2005–2006, the main purpose of trips was tourist and sightseeing activity, while in 2007–2009 visiting relatives and friends. Typically, tourist purposes were manifested more often by boys and the older youth groups. The most frequently chosen forms were individual trips (a drop from 83% in 2008 to 68% in 2009), but also journeys organized within parents' workplace or schools (an increase from 17% in 2008 to 32.1% in 2009). Schools organized most summer camps lasting more than 5 days for approximately 51% of children. In 2009, tourist trips organized by travel agencies and specialized entities were on the increase (in 2008, 17% of children took part in them and in 2009 – 21%). Predictably, the form of trips will develop

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<sup>1</sup> J. Łaciak, *Aktywność turystyczna dzieci i młodzieży w 2009 roku – raport*, <http://dms.msport.gov.pl/app/document/file>.

dynamically.<sup>2</sup> The research conducted fragmentarily in smaller communities shows a similar tendency.<sup>3</sup>

The objective of the study has been to recognize the expectations of high school students with regard to various forms of school tourism. It has also been investigated whether students who enter and conclude the fourth stage of education differ in their interest in tourist activity over the course of compulsory physical education classes as well as whether their expectations associated with the school tourism teacher's personality are significantly diverse. The following research questions have been formulated:

1. Do first- and third-year students differ in terms of their willingness to participate in tourist activity?
2. Are first-year students significantly different from third-year students with regard to the preferred characteristics of a tourism teacher?
3. Does the choice of tourist classes and desirable characteristics of a tourism teacher depend on the respondents' gender?

The study was performed during the second term of 2009–2010 school year

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<sup>2</sup> J. Morawska, *Dokąd zmierza turystyka młodzieżowa?*, "Wiadomości Turystyczne", 2008, No. 2, p. 12.

<sup>3</sup> T. Fąk, *Turystyka w szkolnych programach wychowania w opinii nauczycieli*, in: *Wychowanie dla turystyki: wspomaganie uczestnictwa dzieci i młodzieży w turystyce*, eds. R. Gałęcki, A. Gotwot-Jeziorska, W. Ruszniak, Polish Tourist Association, Warszawa, 2000, pp. 31–42; B. Kaczor, *Uczestnictwo młodzieży szkolnej w turystyce kwalifikowanej (na przykładzie młodzieży szkół Poznania)*, in: *Turystyka aktywna – turystyka kwalifikowana*, eds. T. Łobozewicz, R. Kogut, Nasz Kraj, Warszawa, 1999, pp. 109–114; Z. Lubowicz, *Turystyka dzieci i młodzieży szkół ponadpodstawowych w 1995 roku*, "Problemy Turystyki" 1996, No. 1–4, pp. 105–110; B. Maj, *Turystyka młodzieżowa w środowisku wielkomiejskim – rozmiary i formy uczestnictwa*, *Zeszyty Naukowe Wyższej Szkoły Gospodarki w Bydgoszczy* No. 3 (2), 2005, pp. 201–217; M. Napierała, *Turystyka w oczach młodzieży*, *Zeszyty Naukowe Wyższej Szkoły Gospodarki w Bydgoszczy*, No. 1, 2004, pp. 267–274; K. Prusik, M. Bochenek, K. Görner, K. Prusik, *Aktywność turystyczna a edukacja dzieci i młodzieży szkolnej z regionu południowego Podlasia*, "Rocznik Naukowy AWFis w Gdańsku" 2006, No. 16, pp. 143–152; P. Różycki, *Aktywność turystyczna młodzieży polskiej w świetle dotychczasowych badań*, "Folia Turistica" No. 9, 2000, pp. 89–96; M. Sołtysik, *Sposoby spędzania czasu wolnego przez młodzież szkolną Wrocławia w okresach weekendowych*, in: *Wybrane zagadnienia turystyki*, ed. U. Szubert-Zarzecznny, Wydawnictwo WSZ Edukacja, Wrocław 1999, pp. 95–114; P. Różycki, *Miejsce turystyki w sposobie zagospodarowania czasu wolnego młodzieży szkół ponadpodstawowych Krakowa*, "Folia Turistica" 2001, No. 10, pp. 85–89; A. Wartecka, *Aktywność turystyczna młodzieży w świetle badań*, "Roczniki Naukowe AWF w Poznaniu" 2001, No. 50, pp. 139–153; J. Wyrzykowski, J. Marak, K. Klimentowski, M. Sołtysik, *Czas wolny mieszkańców Wrocławia i jego wykorzystanie na rekreację ruchową i turystykę*, in: *Turystyka w badaniach naukowych: prace ekonomiczne*, eds. A. Nowakowska, M. Przydział, WSiLiZ, Rzeszów 2006, pp. 619–636.

among 250 students of selected high schools in Wrocław from all city districts. The study for first- and third-year students was carried out in secondary and profiled secondary schools, as well as secondary technical schools supervised by the Wrocław municipality in which students of the University School of Physical Education in Wrocław, Poland, conducted their apprenticeship. It was performed in 21 high schools (36.8%). The random sample was chosen on the basis of systematic sampling.<sup>4</sup> In the schools in which students were surveyed their quantity and gender proportions were taken into account. Unfortunately, since the research was voluntary, some third-year students refused to participate in it; besides, not all the questionnaires were filled in correctly. Therefore, the statistical analysis has been based on 102 complete questionnaires (60 female and 42 male) of first-year students and 149 questionnaires (62 female and 87 male) of third-year students. Overall, 122 female and 129 male students have been surveyed.

While gathering data, the method of a diagnostic poll and the questionnaire technique<sup>5</sup> were applied with HGK/PO-2009/10-U questionnaire constructed by the authors.

The research was performed by trained second-year students of the University School of Physical Education in Wrocław specializing in physical education during their pedagogic apprenticeship at schools. After they had been granted the permission for conducting of the research from the head teacher, they informed students that the research was anonymous and voluntary and acquainted students with the objective of the study.

The students were informed that, according to the regulation of the Ministry of National Education and Sport, physical education might be conducted in two forms: as regular lesson or as optional classes. Both systems are compulsory yet optional classes create the opportunity to choose their form. The students were asked which optional classes they would like to choose and when.

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<sup>4</sup> Ch. Frankfurt-Nachmias, D. Nachmias, *Metody badawcze w naukach społecznych*, Zysk i S-ka, Poznań 2001.

<sup>5</sup> T. Pilch, T. Bauman, *Zasady badań pedagogicznych*, Żak, Warszawa 2010.

### 1. Students' preferences concerning the time and type of optional physical education classes

The students prefer sports classes (Figure 1), appointed by nearly 40% of the respondents. The other options are preferred by a similar percentage of the students and more than 20% of them would like to participate in tourism classes.

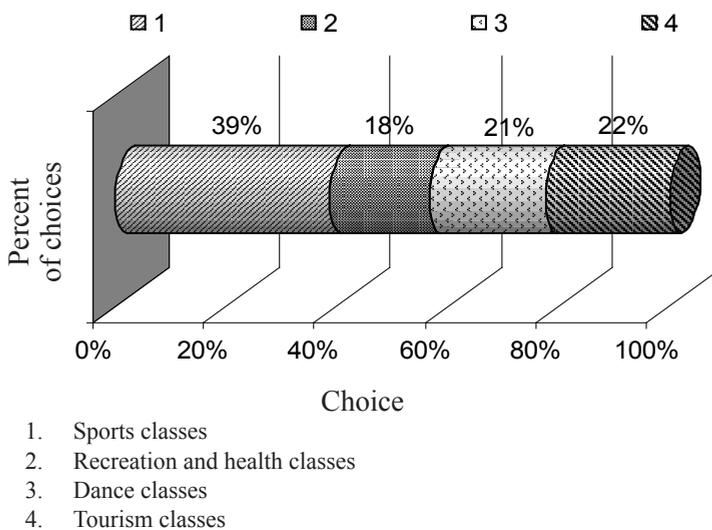


Fig. 1. Preferences of all the students concerning the kind of optional physical education classes

Source: own study.

The respondents were also enquired as regards their preferred duration of chosen classes. The results are depicted in Figure 2.

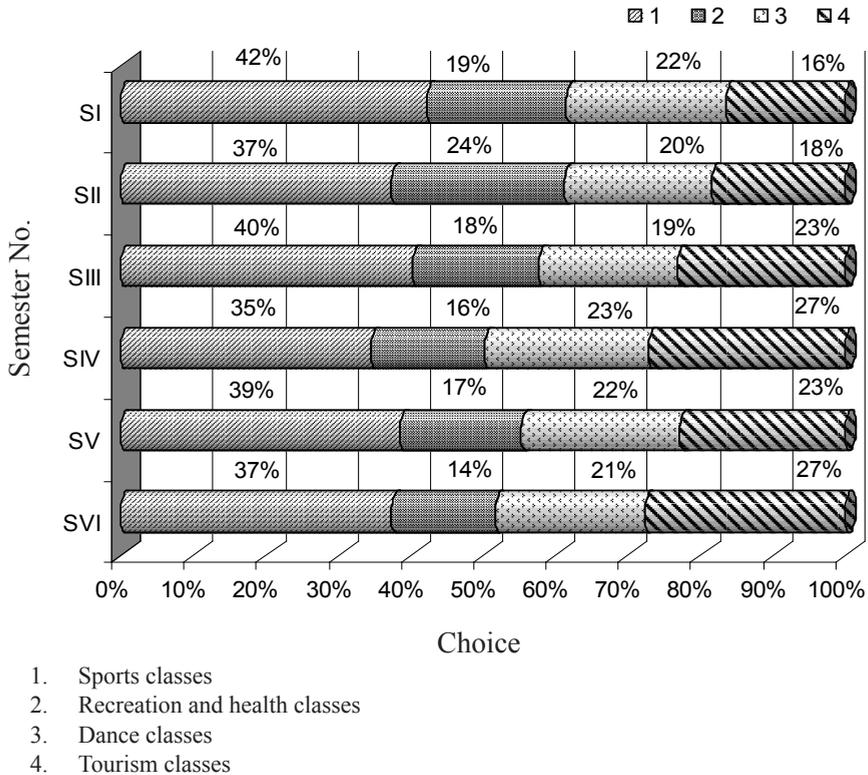
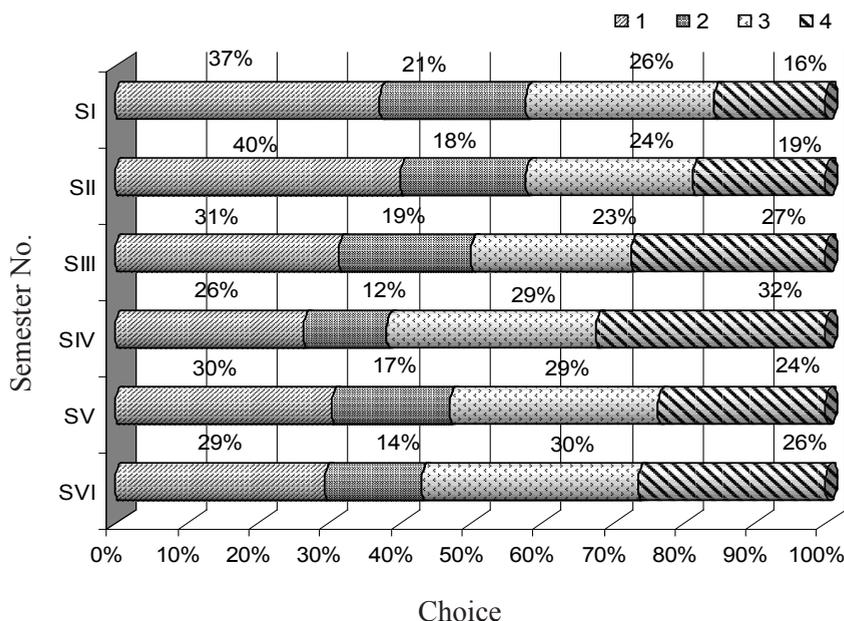


Fig. 2. Preferences of the students concerning the kind and duration of optional physical education classes

Source: own study.

The percentage of the surveyed students willing to participate in sports classes does not depend substantially on the classes duration. The smallest number of students are willing to participate in them for 4 term (35%). The highest percentage of the students wish to attend them for only 1 term (42%) but the percentages of those willing to attend sports classes over 2, 3 and 5 terms are similar (37–39%). The biggest differences in the students' declarations can be observed with respect to tourism classes. The mere 16% of the respondents declare the readiness to participate in the classes for 1 semester, while in a longer period (3–6 terms), the figure increases to 23–27% of all the students. Recreation and health classes are preferred in the short duration (1 term) and in the case of dance classes, the percentage of the students ready to choose them remains steady for 1, 2 and 6 terms.

First-year students favour sports and dance classes regardless their duration (Figure 3). Recreation and health classes prove to be the least popular among the students, with the declining tendency for longer durations. On the contrary, the proportion of first-year students preferring tourist activity is increasing for durations of between 3 and 6 semesters.

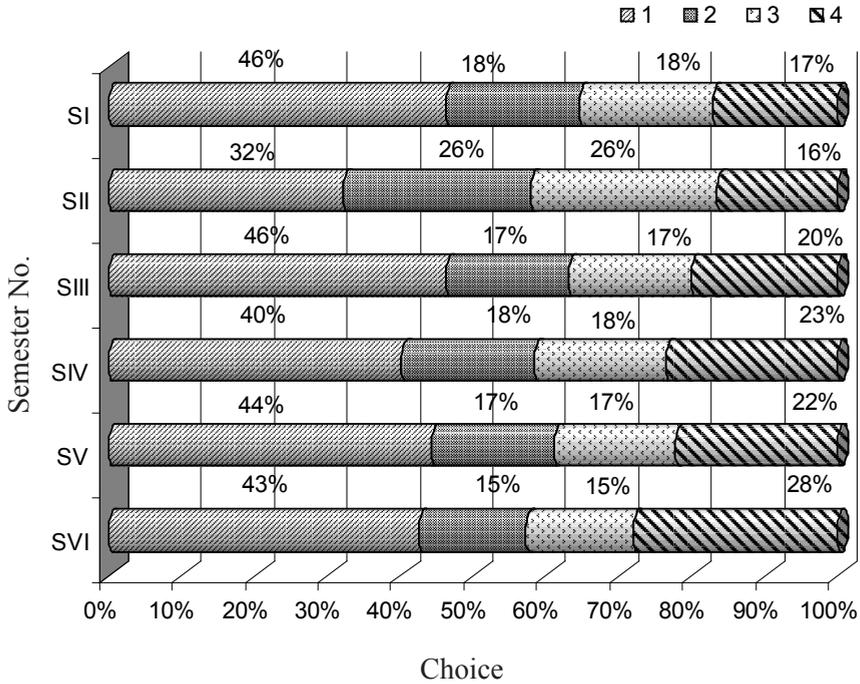


1. Sports classes
2. Recreation and health classes
3. Dance classes
4. Tourism classes

Fig. 3. Preferences of the first-year students concerning the kind and duration of optional physical education classes

Source: own study.

Nearly half of the third-year students declare their willingness to participate in sports classes (Fig. 4). The remaining percentage chooses recreation and health or dance classes in the short duration of 1–2 semesters, but they prefer tourist activity for the duration of 4–5 terms.

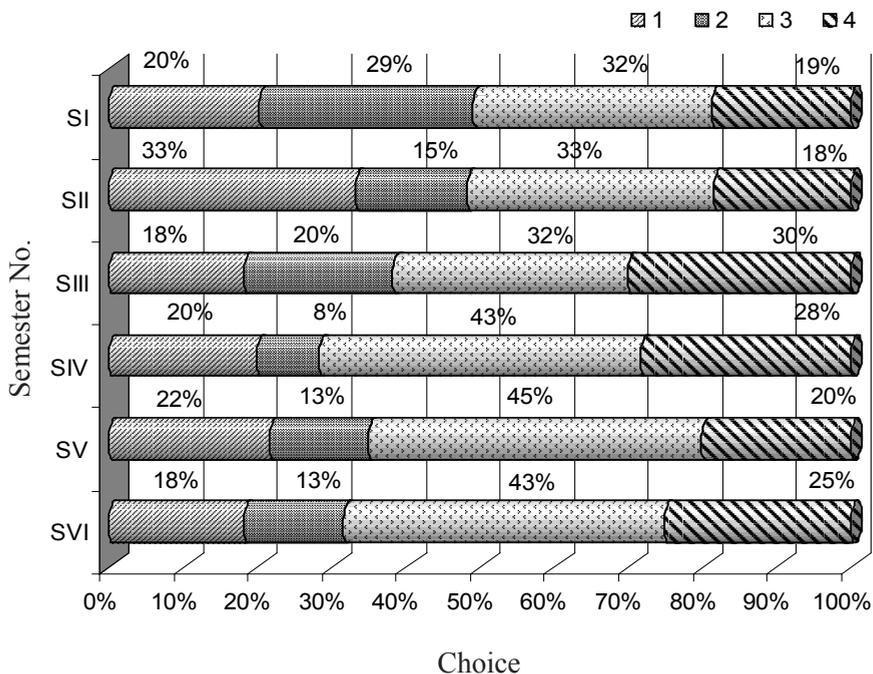


1. Sports classes
2. Recreation and health classes
3. Dance classes
4. Tourism classes

Fig. 4. Preferences of the third-year students concerning the kind and duration of optional physical education classes

Source: own study.

Female first-year students explicitly favour long-term dance (Figure 5) and also tourism classes.

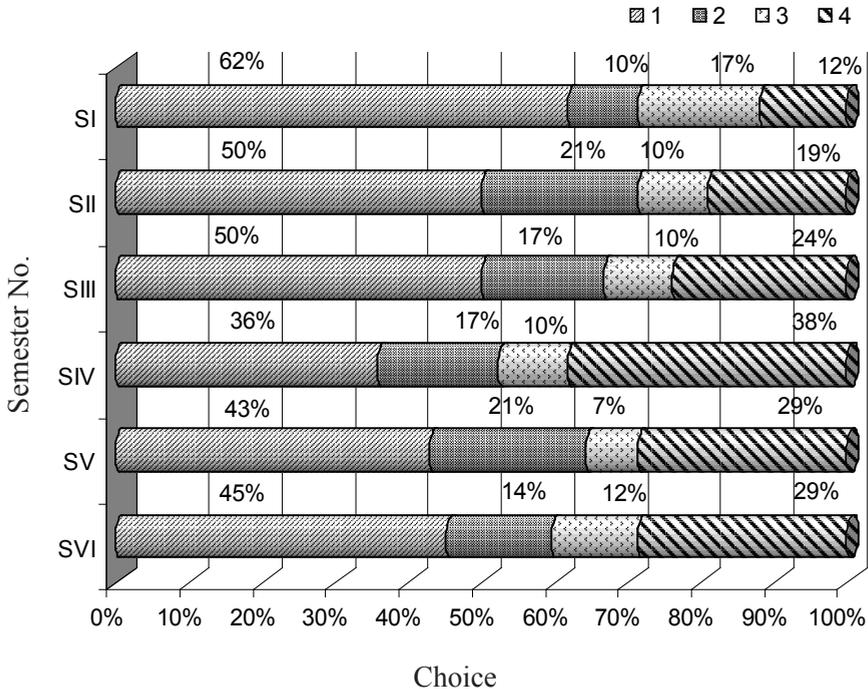


1. Sports classes
2. Recreation and health classes
3. Dance classes
4. Tourism classes

Fig. 5. Preferences of the first-year female students concerning the kind and duration of optional physical education classes

Source: own study.

Male first-year students (Figure 6) select sports classes for their physical education classes, particularly in the short duration (1 term). With regard to the longer periods (4–6 terms), the number of students willing to take part in tourism classes is rising.



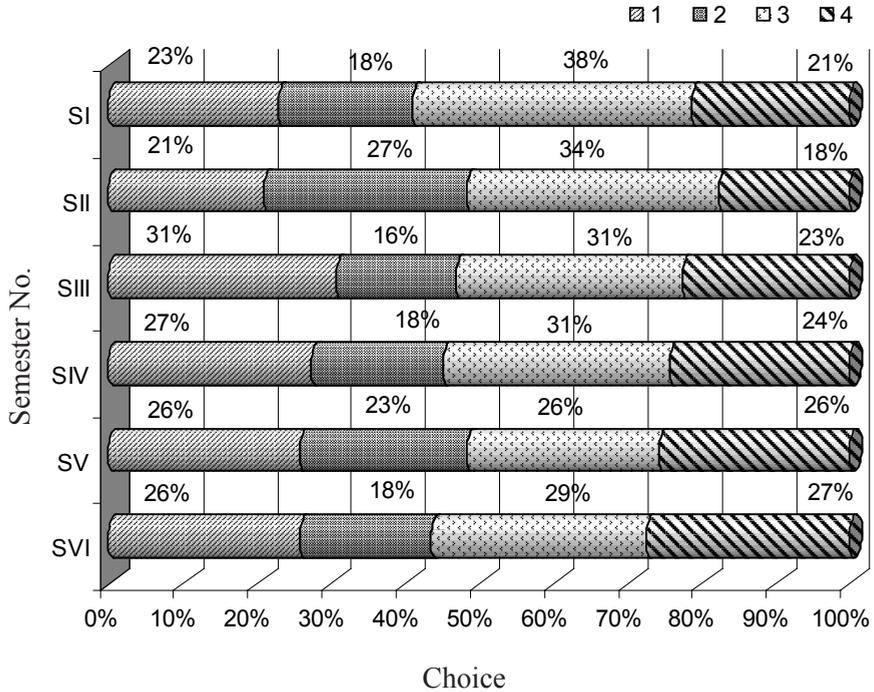
1. Sports classes
2. Recreation and health classes
3. Dance classes
4. Tourism classes

Fig. 6. Preferences of the first-year male students concerning the kind and duration of optional physical education classes

Source: own study.

The structures of choices among first-year students by genders proved to be significantly different.

The same percentage of female third-year students (Figure 7) choose sport, dance and tourism classes for longer durations (5–6 terms). The biggest proportion of girls would like to attend dance classes over 1 term.



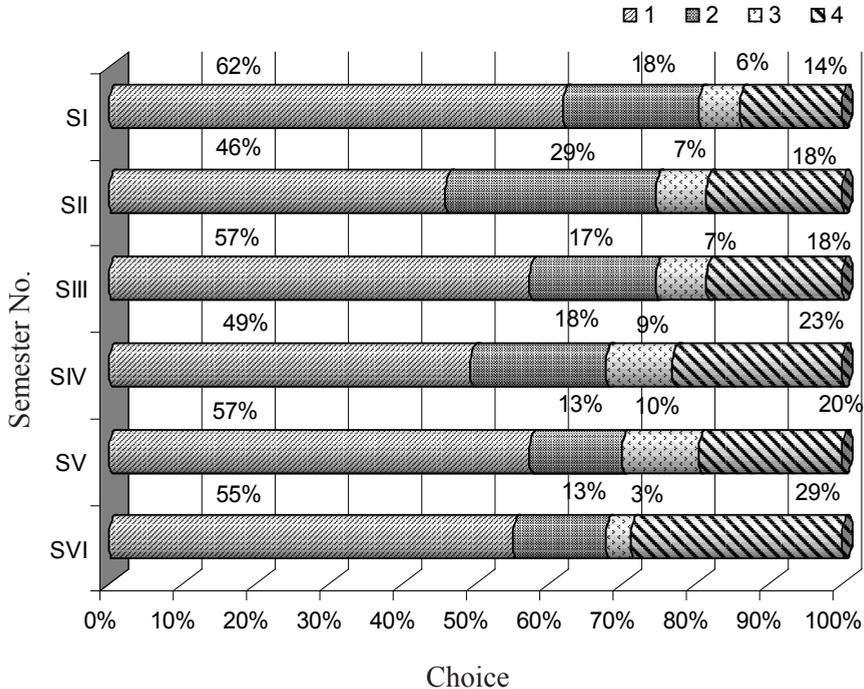
- 1. Sports classes
- 2. Recreation and health classes
- 3. Dance classes
- 4. Tourism classes

Fig. 7. Preferences of the third-year female students concerning the kind and duration of optional physical education classes

Source: own study.

Male third-year students prefer sports classes as the form of physical education (Figure 8). For the short duration, they also select recreation and health classes, whereas for the long duration – tourist activity. Only a modest percentage is interested in dance classes.

The structures of choices among third-year students by genders proved to be significantly different.



1. Sports classes
2. Recreation and health classes
3. Dance classes
4. Tourism classes

Fig. 8. Preferences of the third-year male students concerning the kind and duration of optional physical education classes

Source: own study.

## 2. Authority of a school tourism teacher

What reinforces and what weakens the authority of a school tourism teacher, according to the students? In search for an answer to the question, the researchers asked students to appoint the most desirable and expected personal features of a model school trips and walking tours teachers. The students were requested to rank 30 positive and 20 negative features from the most to the least desirable ones.

Positive features (PF) (30): warm-hearted, friendly, kind, understanding, responsible, cheerful – with sense of humour, able to present knowledge in an attractive manner, perfect in action and professional, establishing contacts with youth easily, patient, impartial, with individual approach to young people, considerate, tactful, initiating, diligent in his commitments, intelligent, fit, just, caring of his outward appearance, knowledgeable about the regulations concerning the safety of trips, able to give first aid, co-operative, experienced in trips organization, imaginative, sensitive to moral values, resourceful, sensible, energetic, caring.

Negative features (NF) (20): quarrelsome, with little initiative, absent-minded, intolerant, conceited, neglecting youth, malicious, with tendency to drink alcohol, bossy, unreliable, brutal, unpunctual, egoistic, capricious, arrogant, choosing the easy way, mendacious, unhelpful, cold, and quick-tempered.

In the ranking, a positive quality ranked 1st obtained 30 points, while a feature ranked 30th – 1 point; negative features, accordingly, were given between 20 points and 1 point. The ranking reflecting opinions of all the respondents representing the particular class was prepared on the basis of the median of points assigned to every feature. Subsequently, the medians of features chosen by boys and girls were compared. The results are presented in figures 9–12.

Ten most important personal features of a model school tourism teacher appointed by both first- and third-year students (Figures 9 and 10) include: responsible, cheerful, warm-hearted, friendly, understanding, able to present knowledge in an attractive manner, kind, establishing contacts with youth easily, patient and perfect in action (first-year students) or impartial (third-year students). The least significant features for first class students are: energetic, experienced in trips organization, and knowledgeable about the regulations concerning the safety of trips. Third-year students selected: knowledgeable about the regulations concerning the safety of trips, caring of his outward appearance, and sensitive to moral values.

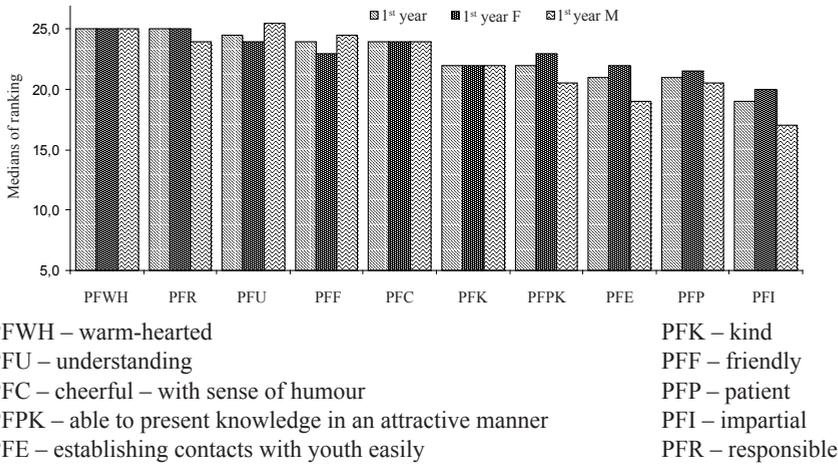


Fig. 9. Ranking of top ten positive features of a school tourism teacher appointed by all first-year students in comparison with first-year female and male choices

Source: own study.

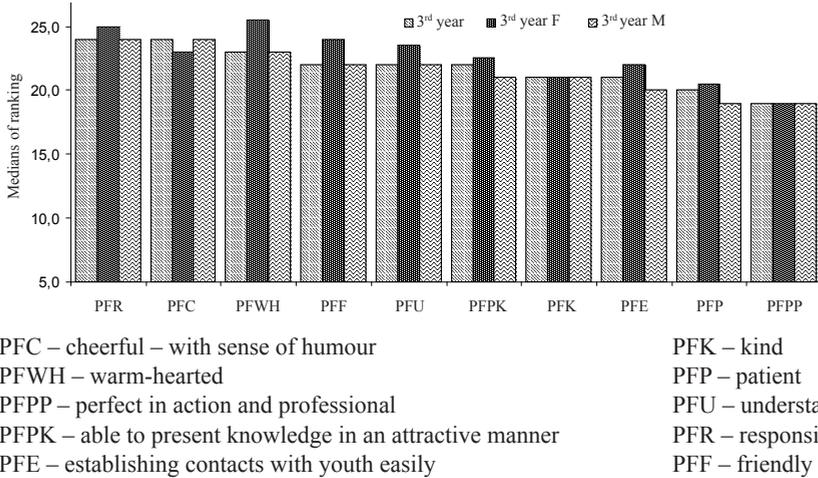
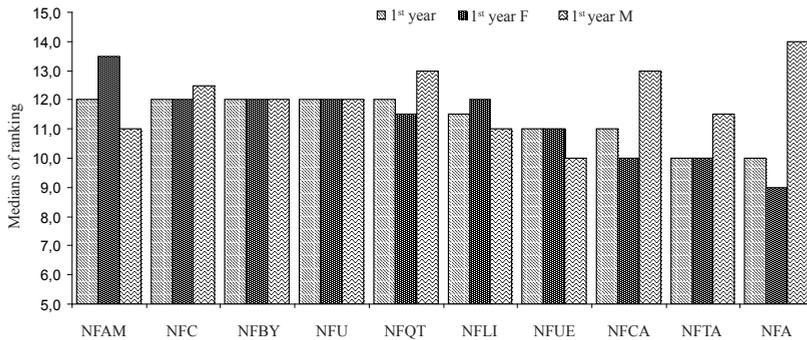


Fig. 10. Ranking of top ten positive features of a school tourism teacher appointed by all third-year students in comparison with third-year female and male choices

Source: own study.

Undesirable, negative personal features appointed commonly by first- and third-year students (Figures 11 and 12) include: absent-minded, conceited, bossy, unpunctual, quick-tempered, unreliable, capricious, with tendency to drink alcohol, arrogant. Furthermore, for first-year students – it was conceited and with little initiative; and mendacious and cold for third-year students.



- NFAM – absent-minded
- NFC – conceited
- NFBY – bossy
- NFU – unpunctual
- NFQT – quick-tempered
- NFLI – with little initiative
- NFUE – unreliable
- NFCA – capricious
- NFTA – with tendency to drink alcohol
- NFA – arrogant

Fig. 11. Ranking of top ten negative features of a school tourism teacher appointed by all first-year students in comparison with first-year female and male choices

Source: own study.

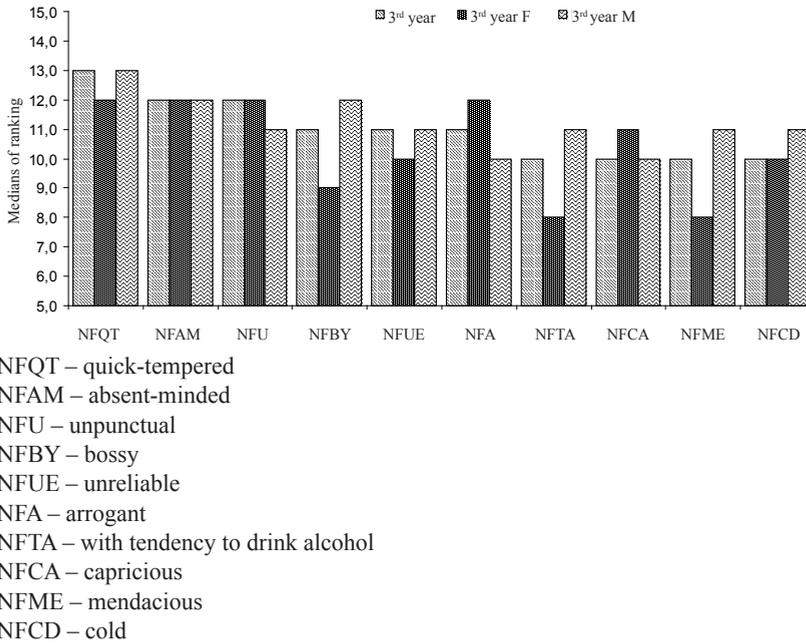
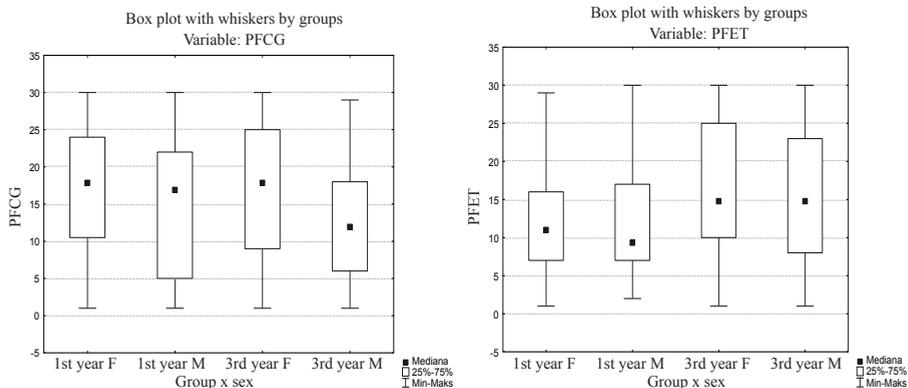


Fig. 12. Ranking of top ten negative features of a school tourism teacher appointed by all third-year students in comparison with third-year female and male choices

Source: own study.

Significant differences in the positive and negative model personal features of school tourism teachers are presented in Figures 13–16.

On the basis of the Kruskal-Wallis one-way analysis of variance, at the significance level of 0.05, the hypothesis about the equality of intensity distribution of choosing by groups *caring* and *experienced in trips organization* should be rejected (Figure 13).



PFCG – caring

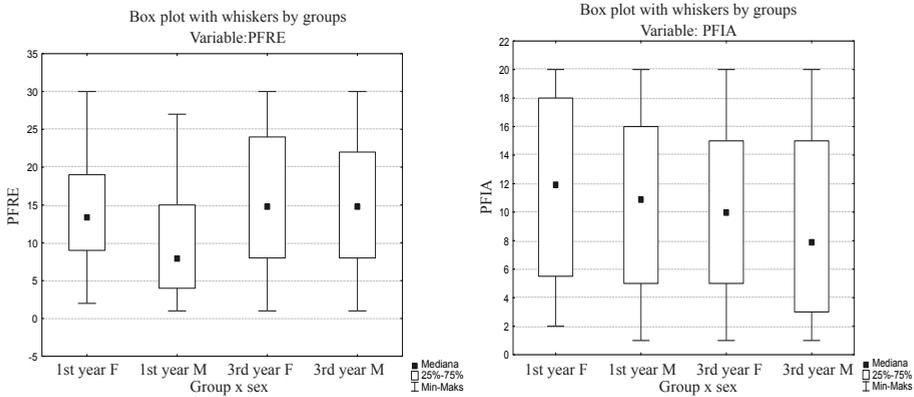
PFET – experienced in conducting trips

Fig. 13. Intensity distribution of choosing *caring* and *experienced in trips organization* features by the year and gender of the respondents

Source: own study.

A typical result of the *caring* feature appointed by third-year male students (3rd year M) is significantly different from the results for first- and third-year female students (1st year F and 3rd year F). Both the median and the smallest results of a typical range of variability are lower. The relationship indicates that a teacher's protectiveness is less important for high school boys (third-year) than for girls from the same group. Moreover, third-year students (3rd year F and 3rd year M) value more experience in trips organization than first-year students (1st year F and 1st year M).

On the basis of the Kruskal-Wallis one-way analysis of variance, at the significance level of 0.05, the hypothesis about the equality of intensity distribution of choosing by groups *resourceful* and *with individual approach* should be rejected (Figure 14).



PFRE – resourceful

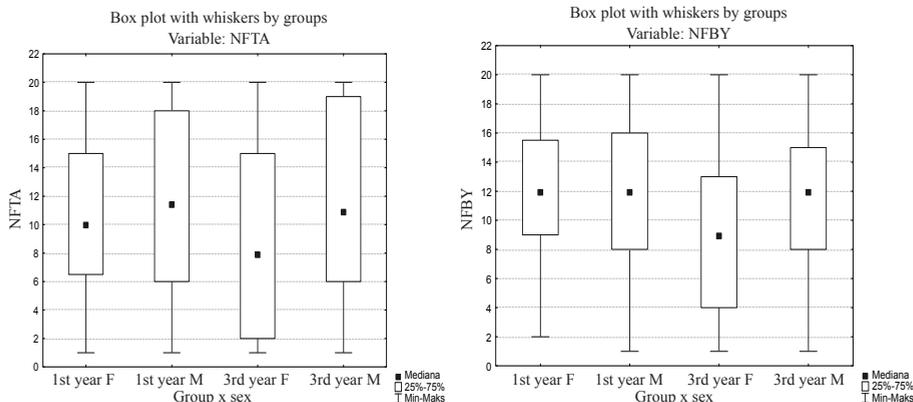
PFIA – with individual approach

Fig. 14. Intensity distribution of choosing *resourceful* and *with individual approach* features by the year and gender of the respondents

Source: own study.

A typical result of the *resourceful* feature appointed by first-year male students (1st year M) is significantly lower than the results for third-year students (3rd year F and 3rd year M). It might be assumed that the teacher's resourcefulness is appreciated by older students regardless of their gender, whereas it is not that significant for younger boys. The feature *with individual approach* significantly differentiates first-year female students (1st year F) and third-year male students (3rd year M). Younger girls expect an individual approach to their problems but boys seem to be more independent from their teacher.

On the basis of the Kruskal-Wallis one-way analysis of variance, at the significance level of 0.05, the hypothesis about the equality of intensity distribution of choosing by groups *with tendency to drink alcohol* and *bossy* should be rejected (Figure 15).



NFTA – with tendency to drink alcohol

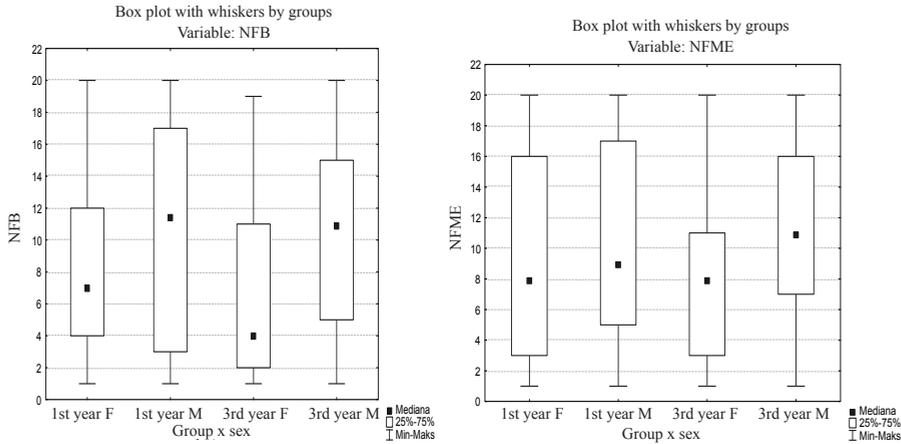
NFBY – bossy

Fig. 15. Intensity distribution of choosing *with tendency to drink alcohol* and *bossy* features by the year and gender of the respondents

Source: own study.

The first feature choice is significantly different among the third-year students (3rd year F and 3rd year M). Boys (3rd year M) evaluated such a teacher's tendency more strictly than girls (3rd year F) who appear to be more tolerant for such addiction. Girls differ with regard to their evaluation of the *bossy* feature. Younger students (1st year F) are definitely more emphatic in their rejection of such an attitude than older ones (3rd year F).

On the basis of the Kruskal-Wallis one-way analysis of variance, at the significance level of 0.05, the hypothesis about the equality of intensity distribution of choosing by groups *brutal* and *mendacious* should be rejected (Figure 16).



NFB – brutal

NFME – mendacious

Fig. 16. Intensity distribution of choosing *brutal* and *mendacious* features by the year and gender of the respondents

Source: own study.

Older girls (3rd year F) differ considerably in their evaluation of the *brutal* feature from boys (1st year M and 3rd year M). This attitude is far more negative for them than for boys. Older girls (3rd year F) also differ significantly from their peers in their view concerning the *mendacious* feature. They are more indulgent for a teacher with such a tendency than their male friends (3rd year M).

### 3. Discussion concerning tourism forms

The results of the research concerning youth tourism in big-city communities are convergent. The study among randomly selected high school youth aged 17 in Bydgoszcz (307 people) has showed that 17% of them declare interest in tourism and its weekend forms would be willingly chosen by more than 21%.<sup>6</sup> 12% of the analysed group do not reflect such needs and 10% gave no specific answer. 34% of the respondents declare their wish to participate in tourist trips more frequently. The preferred forms of tourism include family and friends

<sup>6</sup> B. Maj, *Turystyka młodzieżowa...*

visitations but over 40% of the students, regardless of the type of school, would like to choose a trip to the mountains, over the water or to another city. More than 50% of youth select trips in the companion of their peers.

The research conducted by Napierała<sup>7</sup> among high school youth aged 15–18 in Bydgoszcz has brought more optimistic results. 75% of girls and 85% of boys prefer walking mountain tours and cycling tourism as the manner of spending their leisure time. 65% of them would favour school trips with their peers.

The secondary school youth in Cracow (884 randomly selected students of diverse schools) declare taking part in tourist activities (43.5%).<sup>8</sup> They are chosen nearly twice more frequently by high school students and more often by girls, mainly during summer holidays in the mountains, at the seaside, on the lakeside or abroad.

The research on leisure time activities of Wrocław youth<sup>9</sup> has embraced primary school and secondary school youth aged 14–20 (512 students). The outcomes indicate that the ludic and social style plays predominant role in young people's behaviour, with the dominance of receptive activities (watching TV, listening to the radio, book and press reading, computer games etc.). Participation in active recreation or tourism is not very attractive for the youth but more than 40% of them have no concepts of how to diversify their leisure time activities. However, in Wyrzykowski's research,<sup>10</sup> almost 80% of high school youth and 63% of junior high school students declare their willingness to devote more time to recreation and tourism.

The research among secondary school youth in Poznań has revealed a similar tendency.<sup>11</sup> The interest in tourism (walking, cycling and mountain) is manifested by 81% of the respondents, with other possibilities of spending leisure time proposed. At the same time, only 3% appoint the school as a tourism organizer, while individual tourism is preferred by 43% of the students.

Prusik et al.<sup>12</sup> have conducted a research among primary, junior high and high school pupils and students (562 people) from the south of Podlasie. 73.6% of youth

<sup>7</sup> M. Napierała, *Turystyka w oczach młodzieży...*

<sup>8</sup> P. Różycki, *Miejsce turystyki...*

<sup>9</sup> M. Sołtysik, *Sposoby spędzania czasu wolnego...*

<sup>10</sup> J. Wyrzykowski, J. Marak, K. Klimentowski, M. Sołtysik, *Czas wolny...*

<sup>11</sup> B. Kaczor, *Uczestnictwo młodzieży...*

<sup>12</sup> K. Prusik, M. Bochenek, K. Görner, K. Prusik, *Aktywność turystyczna...*

participate in coach trips, 71.3% are involved in cycling tourism, with rather modest school contribution to these figures (21.1% have taken part in events organized by schools once a year, 27.6% once a term, and 15.8% once a month).

A research has also been carried out in primary schools of the Bielsko-Biała district (137 pupils). A specialized educational programme “Tourism in my region” has been introduced.

Wartecka’s research<sup>13</sup> among the youth of Great Poland has showed that between 1987 and 1994 the percentage of young people who did not participate in tourist trips increased (from 6% to 12%) and the proportion of those who took part in them declined (from 94% to 88%).

An all-Polish research on the tourist activity of youth has been conducted as well. Różycki<sup>14</sup>, in the course of his 30-year studies, observed the rise by 4.4% annually. In 1994, more than 88% of the youth were involved in active tourism (mainly in secondary schools), with higher proportion of the youth from towns and cities, mostly in the companionship of peers (62%). Trips organized by the school accounted for 35% of all trips.

Lubowicz,<sup>15</sup> as a result of the research conducted in 100 randomly selected schools (1600 people), has come to the conclusion that the number of departures increased from 88.1% (1994) to 90.7% in 1995. The youth’s preferences referred to precise tourist plans with 91.3% of the students, mainly trips to the seaside, to the mountains, and abroad (40%).

It can be observed that the youth tourism constitutes a significant segment of tourist movement and has become young people’s lifestyle. The youth travels to the country and abroad, in different seasons of the year, and is involved in diverse forms of tourism.

A research over randomly chosen group of 100 Wrocław profiled secondary schools students<sup>16</sup> indicates that over 40% of the students are not interested in mountain tourism and have not once gone to the conveniently situated Karkonosze Mountains. 22% state that they have visited the mountains once or

<sup>13</sup> A. Wartecka, *Aktywność turystyczna...*

<sup>14</sup> P. Różycki, *Aktywność turystyczna...*

<sup>15</sup> Z. Lubowicz, *Turystyka dzieci...*

<sup>16</sup> I. Bartusiak, A. Nowak, A. Romanowska-Tołoczko, *Edukacyjne aspekty uprawiania przez młodzież turystyki górskiej*, “Pedagogika, Psychologia ta Medycyna – Biologiczni Problemi Fizycznego Vihovanna i Sportu” 2009, No. 9, pp. 164–169.

twice. The majority of the respondents blame schools for the situation for it does not organize trips or walking tours in the area.

#### 4. Discussion concerning teachers' attitude

The teacher should not only teach but also educate. In the profession, besides knowledge and practical teaching skills, particular inborn or acquired features play a vital role. They reflect a teacher's personality, ability to make students interested in the subject, and stimulating them to achieve educational success. 66% of teachers believe that particular personality qualities are essential in their profession.<sup>17</sup> They enable a teacher to recognize other people's emotions and react adequately as well as manage their relationships. They determine the skill of inspiring and encouraging others to development, building a team spirit, leading a group, solving problems, and communicating. The opportunity of conducting physical education at school as tourism classes creates a new perspective of introducing students to the world of physical culture. The effects of education for leisure time culture in the form of well-established tourist behaviour among young people depend on how competent physical education teachers will fulfil the role of school tourism teachers. Is school sufficiently prepared to meet the youth's expectations?

Tauber's research<sup>18</sup> aims at discovering teachers' opinions concerning the function of school tourism. 50 teachers of each speciality (physical education, geography, history, Polish, biology, physics and English) have taken part in the study. The educational values of tourism are recognized mostly by physical education (84%) and geography teachers (82%). 99% of the physical education teachers notice values of qualified tourism as an excellent tool to educate a modern man in physical and moral realms. The physical education, geography and biology teachers (82%) believe that tourism develops positive features of character (bravery, independence, interpersonal and social skills).

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<sup>17</sup> M. Sołtysik, *Aktywność rekreacyjno-turystyczna a czas wolny młodzieży szkolnej Wrocławia*, "Człowiek i Ruch/Human Movement" 2002, No. 2 (6), pp. 75–87.

<sup>18</sup> E. Tauber, *Turystyka a wychowanie w oczach badanych nauczycieli*, in: *Czas wolny, rekreacja, turystyka, hotelarstwo, żywienie (Wyniki badań naukowych)*, eds. W. Siwiński, R. Tauber, E. Mucha-Szajek, Wyższa Szkoła Hotelarstwa i Gastronomii, Zeszyty Naukowe Wyższej Szkoły Hotelarstwa i Gastronomii w Poznaniu, Poznań, 2003, pp. 473–476.

A research among students (425 people) and graduates (275 people) of all the physical education universities in Poland<sup>19</sup> indicates that they evaluate their preparation as sufficient but they do not feel well-prepared to plan and apply educative responsibilities. Further studies on the problem<sup>20</sup> demonstrate that the level of preparation of physical education students is lower than tourism and recreation students. The latter are not permitted to work at schools as teachers so they cannot teach physical education in optional classes form. Therefore, introducing the term “school tourism teacher” would unambiguously indicate that the mentioned classes are not only extracurricular (with voluntary participation).

## Conclusion

The principal question of the present study is related to high school students' interest in active tourism education and the personality profile of a teacher who introduces them to the world of leisure time culture values.

Approximately 30% of the respondents (first- and third-year students) are interested in participating in school tourism classes (as optional classes) rather than in the course of compulsory physical education at school. The percentage increases along with the duration of tourism classes – from 16% of the students for one term to nearly 30% for 4, 5 or 6 terms. The differences in the students' declarations by genders can be observed only among first-year students. Boys favour tourism classes, whereas girls tend to prefer dance classes.

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<sup>19</sup> A. Gajdzińska, *Przygotowanie do zawodu specjalisty turystyki i rekreacji*, in: *Czas wolny, rekreacja, turystyka, hotelarstwo, żywienie (Wyniki badań naukowych)*, eds. W. Siwiński, R. Tauber, E. Mucha-Szajek, Wyższa Szkoła Hotelarstwa i Gastronomii, Zeszyty Naukowe Wyższej Szkoły Hotelarstwa i Gastronomii w Poznaniu, Poznań 2003, pp. 487–493.

<sup>20</sup> H. Guła-Kubiszewska, P. Oleśniewicz, *Edukacja do kultury czasu wolnego a cechy wzorcowe animatorów turystyki szkolnej*, in: *Humanistyczny wymiar kultury fizycznej*, ed. M. Zasada, Uniwersytet Kazimierza Wielkiego w Bydgoszczy, Monografie No. 12/10, Bydgoszcz–Lwów–Warszawa, Ośrodek Rekreacji, Sportu i Edukacji w Poznaniu, Poznań, 2010, pp. 40–63; H. Guła-Kubiszewska, P. Oleśniewicz, *Turystyka szkolna – przygotowanie edukatorów w ocenie studentów kierunku wychowanie fizyczne oraz turystyka i rekreacja*, in: *Ewaluacja i innowacje w edukacji. Kompetencje i odpowiedzialność nauczyciela*, ed. J. Grzesiak, Uniwersytet im. A. Mickiewicza w Poznaniu, PWSzZ w Koninie, Kalisz–Konin 2010, pp. 251–552; H. Guła-Kubiszewska, P. Oleśniewicz, *Turystyka szkolna: poziom przygotowania studentów wychowania fizycznego do prowadzenia zajęć*, in: *Sbornik recenzovaných příspěvků z mezinárodní vědecké konference 'Hotelnictví, turismus a vzdělávání dnes a zítra'*, Vysoká škola hotelová, Praha 2010, pp. 80–89.

First- and third-year students agree as to the nine key features of a model school tourism teacher. He ought to be *responsible, cheerful, warm-hearted, friendly, understanding, able to present knowledge in an attractive manner, kind, establishing contacts with youth easily, and patient*. The characteristic of the least importance for the students is *knowledge about the regulations concerning the safety of trips*.

The common undesirable personal features appointed by first- and third-year students include: *absent-minded, conceited, bossy, unpunctual, quick-tempered, unreliable, capricious, with tendency to drink alcohol, and arrogant*.

The students significantly differ in selecting the following personal features: *caring, experienced in trips organization, resourceful, with little initiative, with tendency to drink alcohol, bossy, brutal, and mendacious*. Younger girls (first-year students) appreciate a teacher with a rich initiative in trip conducting, unlike their older school friends (third-year students). All the girls expect a teacher to be caring, unlike the older boys. All boys oppose more the teacher's tendency to drink alcohol than the third-year female students. However, they are more indulgent than the older girls for violent and brutal behaviour. The girls differ considerably in their evaluation of the *bossy* feature. The older ones would be more willing to tolerate it than their younger friends. A resourceful teacher is valued higher by third-year students (both boys and girls) than by younger boys. The older boys and girls (third-year students) differ with respect to their evaluation of the *mendacious* feature. Boys appear to be more indifferent towards it than their female friends, who require from a teacher a higher level of honesty and reliability.

Establishing the authority of a school physical education teacher in the new role will not be easy. Therefore, school tourism animators should be carefully selected, thoroughly educated, and constantly trained.<sup>21</sup>

To sum up the collected data, the following can be ascertained:

1. Students of high schools in Wrocław (the first and last year of their education) are interested in participating in tourism classes over the course of physical education classes. The willingness is manifested by approximately 30% of the respondents.
2. Students' declarations concerning the form of optional classes is differentiated by the gender of the respondents – girls choose mainly dance classes,

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<sup>21</sup> M. Sołtysik, *Aktywność rekreacyjno-turystyczna...*

while boys select chiefly sports classes. The interest in tourism is similar for boys and girls.

3. Students share a similar personal profile of the school tourism teacher. They appreciate the sense of responsibility, as well as educational and interpersonal skills.
4. Girls and boys representing various education levels manifest differences in their evaluation of a personal profile of a model school tourism teacher with regard to the following features: *caring, experienced in trips organization, resourceful, with individual approach to young people, with tendency to drink alcohol, bossy, brutal, and mendacious.*

The face of school education in sightseeing and tourism, both inside and outside of school, will be formed, among others, by physical education teachers who will try to fit the new role of school tourism teacher. The personal example of a physical education teacher can play a vital role in initiating interest and passion for tourism. New, attractive perspectives are open for conducting school physical education in big cities, the perspectives of shaping genuine participants of tourist culture.

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## **TURYSTYKA SZKOLNA JAKO ELEMENT WYCHOWANIA FIZYCZNEGO W ŚWIECIE AKTYWNOŚCI TURYSTYCZNEJ DEKLAROWANEJ PRZEZ UCZNIÓW SZKÓŁ ŚREDNICH WROCŁAWIA**

### **Streszczenie**

Celem badania było rozpoznanie oczekiwań uczniów szkół średnich w zakresie różnorodnych form turystyki szkolnej, a także profilu osobowościowego nauczyciela turystyki szkolnej. Badanie przeprowadzono w drugim semestrze roku szkolnego 2009/2010 wśród 250 uczniów wybranych szkół średnich na terenie Wrocławia. Zastosowano metodę sondażu diagnostycznego oraz technikę ankiety. W pracy przedstawiono też omówienie wyników innych badań dotyczących prezentowanego tematu. Wyniki wskazują, że uczniowie szkół średnich są zainteresowani uczestnictwem w zajęciach turystyki szkolnej w ramach wychowania fizycznego; chęć taką deklarują zarówno dziewczęta, jak i chłopcy. Uczniowie mają też podobne oczekiwania dotyczące profilu osobowościowego nauczyciela. Cenią poczucie odpowiedzialności, a także umiejętność przekazywania wiedzy i zdolności interpersonalne. Osobisty przykład nauczyciela wychowania fizycznego może mieć duże znaczenie w kształtowaniu zainteresowań i pasji turystycznych.

**Słowa kluczowe:** turystyka szkolna, szkoła średnia, zajęcia opcjonalne, profil osobowościowy nauczyciela

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## **HUMAN RESOURCE MANAGEMENT IN CHAIN HOTELS ON THE EXAMPLE OF RADISSON BLU HOTEL IN SZCZECIN**

### **Abstract**

Chain hotels differ from independent hotels in very many features. One of them is human resource management, what stems from the fact that personnel policy of a chain hotel is thoroughly devised. All aspects related to it have to be precisely described and rather universal since they concern employees working all around the world, that is personnel representing various nations, cultures, outlook on life, etc. The article consists of three substantive parts, an introduction and a conclusion. The first part of the article, which is theoretical, concerns human resource management and its significance in the hotel industry. The next two parts are analytical and empirical (in the form of case study) and they describe basic organizational areas of functioning of the Radisson Blu hotel in Szczecin and particular human resource management tools in the analysed hotel.

**Keywords:** hotel industry, human resources, management

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## **Introduction**

One of the essential success factors of modern hotel enterprises functioning in a highly competitive environment is their employees. Their contribution to work and engagement have a significant influence on carrying out a strategy determined by an enterprise.

In order to achieve objectives arising from a policy that an enterprise adopts, human resources have to be properly managed. In other words, it means that a given organization conducts activities associated with managing human resources in such a way that particular strategic objectives are achieved.

The research scope the article is human resource management in chain hotels. These hotels differ from independent hotels in very many features. One of them is human resource management, what stems from the fact that personnel policy of a chain hotel is thoroughly devised. All aspects related to it have to be precisely described and rather universal since they concern employees working all around the world, that is personnel representing various nations, cultures, outlook on life, etc.

The aim of the article is to present the analysis of human resource management tools in a chain hotel on the example of the *Radisson Blu* hotel in Szczecin.

The theoretical content of the study results from using primarily the desk research in the form of an analysis of literature on the subject and reports, whereas the empirical one is based on the secondary material provided by the analysed hotel (case study). Furthermore, the logical operations such as e.g. deduction and induction and an observation method (especially in terms of practical aspects) have also been applied.

### **1. Human resource management and its significance in the chain hotel industry**

Human resource management is a set of decisions and activities identified with people and aimed both at achieving objectives of an organization and satisfying needs of its employees. The fundamental objective of such a kind of management is to achieve success owing to employed people and by achieving and maintaining high work effectiveness and increasing the value of human capital according to the overarching objectives of an organization.

This kind of management is functional, institutional and instrumental.<sup>1</sup> The functional aspect in human resource management is defined by organizing particular tasks, activities and undertakings carried out during processes of creating value. The institutional aspect refers to presenting particular roles and competence of entities qualified for making decisions on personnel as well as mutual relations between them. It is a structural solution that regulates performing a human resource function. The instrumental aspect of human resource management involves the selection of relevant instruments, techniques and methods for solving personnel system problems used in managing human resources. Human resource management is of great significance for functioning of a particular organization, hence literature on the subject also emphasises its operational and strategic aspect. It enables the effective conduct of current activities related to planning employment, recruitment and redundancy of personnel, managing work of teams, assessing, remunerating, training of employees as well as, in the long-term, controlling productivity and work costs.<sup>2</sup>

Human resource management instruments include<sup>3</sup>:

- planning employment (determining the appropriate number of personnel, defining required qualifications and personal qualities of an employee necessary for a given position),
- recruitment and selection,
- training and development of employees,
- incentive schemes and benefits,
- objective systems of employee assessment.

Terms related to the hotel industry are very rarely defined unambiguously. The terms such as “hotel chain”, “hotel system”, “chain hotels”, or even “brand hotel industry” are treated as synonyms both in the colloquial language and often in academic literature, and they are juxtaposed with “independent hotels,” a notion which does not have a commonly accepted definition, either. The above understanding of the hotel industry **stems from a relatively diverse structure of management as well as the ownership of particular chain**

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<sup>1</sup> C. Zając, *Zarządzanie zasobami ludzkimi*, Wydawnictwo Wyższej Szkoły Bankowej, Poznań 2007, p. 13.

<sup>2</sup> Ibidem.

<sup>3</sup> A. Panasiuk, D. Szostak (eds.), *Hotelarstwo. Usługi – eksploatacja – zarządzanie*, Wydawnictwo Naukowe PWN, Warszawa 2008, p. 224.

**hotels.** For the purposes of this article, the definition describing a hotel chain as a complex of at least two hotels functioning under the same name and logo has been adopted.<sup>4</sup>

The following features of this kind of facilities are provided by the literature on the subject<sup>5</sup>:

- uniform organizational system in all subsidiaries (a uniform organizational structure);
- unified operation documentation;
- uniform range of services and a customer service system;
- their own booking system which includes all organizational units of a system and is easily available for all repeat and potential customers;
- uniform computer system in all subsidiaries;
- uniformity of location conditions;
- uniform standards of a facility and its accommodation and catering equipment;
- their own organized licensing system;
- uniform hotel logotype.

Continuing the discussion on the aspect of the hotel industry, it needs to be emphasized that a hotel offer has both material (e.g. furniture, equipment, food) and nonmaterial features including, among others, the atmosphere in a hotel and the customer service. Therefore, in order to take care of guests in a hotel appropriately, all personnel should be involved. Apart from the modern equipment and interior design of a hotel, guests also expect courtesy and a warm and special atmosphere to feel good and special. A person staying in a hotel must feel that s/he is welcome and warmly received. Then, satisfying guest needs is a result of understanding a service function of one's position at work, showing due respect, creating a friendly atmosphere, enabling a hotel guest to present their arguments and offering considerable help. The hotel industry is based on mutual trust as well as on individual care of a guest and its fundamental

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<sup>4</sup> M. Sidorkiewicz, A. Pawlicz, *Propedeutyka hotelarstwa. Ujęcie ekonomiczne*, Difin, Warszawa 2015, p. 73.

<sup>5</sup> T. Tulibacki, *Międzynarodowe systemy hotelowe*, Wyższa Szkoła Hotelarstwa, Gastronomii i Turystyki, Warszawa 2000, p. 6.

function is offering hospitality, that is welcoming guests warmly.<sup>6</sup> Therefore, speaking of the hotel industry, so many things depend on the hotel personnel with whom a guest has a direct contact, for this influences the hotel atmosphere.

Thus, human resource management is one of the most important elements making up the process of management in a hotel. Nowadays, human capital becomes the main factor of gaining and maintaining a competitive advantage of enterprises and it is particularly important in the hotel industry where personnel plays a special part. It is the hotel personnel who determines guests safety, a level and culture of service as well as the atmosphere and impression that a guest gets. When employees are not reliable and do not identify themselves with a tourism enterprise, all organizational and financial efforts as well as public relations activities may turn out to be ineffective.<sup>7</sup>

In order to achieve the economic goals of a hotel, an employee has to be appropriately developed. The management of human skills, qualities and manner is very complicated. Complexity and significance of employees' skills make all hotel enterprises aware of the necessity of developing these skills. Adequate methods of influencing employee's behaviour should be constantly used. Good human resource management results in employees who are committed and engaged, feel responsible for their own activities, eagerly participate in all processes in a company and contribute to their constant improvement.<sup>8</sup>

## **2. Description of basic organizational aspects concerning functioning of the Radisson Blu hotel in Szczecin**

The *Radisson Blu* hotel is part of the *Rezidor* hotel group. The group consists of 422 hotels in 58 countries all over the world.<sup>9</sup> The four-star hotel in Szczecin was opened on 9 November 1992. In 2009, there was a change of name from Radisson SAS to the current name, *Radisson Blu*. The analysed hotel is part of an office complex, PAZIM, where the wellness and spa centre, and a cafe are

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<sup>6</sup> J. Adamowicz, G. Wolak, *Jak być hotelarzem*, Krakowska Szkoła Hotelarska, Kraków 2004, p. 78.

<sup>7</sup> A. Panasiuk, D. Szostak (eds.), *Hotelarstwo...*, p. 224.

<sup>8</sup> *Ibidem*.

<sup>9</sup> [www.rezidor.com](http://www.rezidor.com).

located. The hotel is situated in the centre of Szczecin, 40 km from the Goleniów airport, 2 km from a railway station and in the vicinity of the most important touristic attractions of the city.

In the Radisson Blu hotel in Szczecin there are 369 rooms and apartments with either twin beds, or one double bed, a TV, a radio, paid video channels, a telephone with an answering machine, an individually adjusted air-conditioning, a mini-bar and a possibility of using the Internet via modem or wirelessly.<sup>10</sup> The hotel offers rooms differing, among others, in terms of size, or equipment.

The hotel offers various restaurant services: the restaurants *Europa Restaurant & Cafe* and *Renaissance*, *Lobby Bar* and *Copernicus Bar*. The restaurants offer international cuisine and seasonal specialities prepared from products from local producers.

The hotel has a modern conference and reception centre for both small and bigger meetings (up to 550 people). In the conference centre, there are rooms equipped with audiovisual equipment, wireless Internet and a possibility of using *DigiChart* technology enabling digitalizing notes from a flipchart with a single click. The centre provides services in planning and organizing conferences, seminars, training and occasional meetings.

The hotel also offers recreational services as part of *Fitness World Club* in which one can find an indoor swimming pool, a sauna, a gym, a relaxation room, massages and aerobics classes. The hotel is directly connected with the city SPA, *Baltica Wellness & Spa* in which there are, among others, the wellness zone with aroma, steam and Ottoman baths, a dry sauna, a tepidarium, caldarium, a stream shower, a snow grotto and jacuzzis. The meetings for even several dozen of people are organized in the wellness zone, e.g. as part of the training and conference offer.<sup>11</sup>

The main element of hotel's functioning is providing services by its employees, therefore effectiveness and a particular quality of a service process will mainly depend on an organizational structure. A linear organizational structure of the *Radisson Blu* hotel in Szczecin is based on hierarchical dependencies. It is essential that each employee has one superior; a fact which enables taking quick decisions and enforcing the execution of decisions. This structure supports clarity of company hierarchy and responsibilities of all employees.

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<sup>10</sup> [www.radissonblu.com](http://www.radissonblu.com).

<sup>11</sup> [www.radissonblu.pl/hotel-szczecin](http://www.radissonblu.pl/hotel-szczecin).

The hotel is managed by a managing director whose subordinates are as follows<sup>12</sup>:

- financial director whose subordinates are: an accounting department (a chief accountant, accountants, a chief cashier, a payroll specialist), a procurement department (a procurement manager, a logistics specialist, a warehouse management specialist, a cost controller), an HR department (an HR manager, an HR and training specialist),
- sales and marketing director in charge of the sales and marketing department (sales managers, the sales and marketing coordinator),
- conference and reception manager in charge of the conference and reception department (the conference and reception consultant) and receptions (reception shift managers, waiters),
- restaurant manager, a head chef in charge of the restaurants and bars (restaurant and bar shift managers, waiters, barmen), the kitchen (sous chefs, chefs), pastry (a head pastry chef, pastry chefs), the kitchen help department (the kitchen help manager, kitchen help shift managers, kitchen help employees),
- reception desk manager under whom there are a reception and bell service personnel (reception duty managers, receptionists, receptionists – night audit, a porter, a switchboard operator), a reservation department (a reservation manager, a reservation employee), a fitness club (a fitness club manager, fitness instructors, receptionists),
- maintenance manager in charge of the maintenance department (office managers, chambermaids, cleaning employees responsible for public surfaces, uniform employees, the tailor, the gardener), mini-bars (service employees),
- technical director in charge of the technical department (the mechanic, the automatics employee, the electrician, the carpenter, the painter, the locksmith, the handyman), the IT department (the IT manager, IT specialists),
- security director in charge of the security department (security shift managers, security officers).

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<sup>12</sup> Own work on the basis of: internal material of the *Radisson Blu* hotel in Szczecin.

Additionally, the managing director is a superior of an occupational health and safety specialist. The hotel hires 208 people working on the basis of an employment contract and 120–150 people on the basis of a mandate contract (monthly, as of 30.04.2015). In addition, teenage students (14 people) as well as trainees and apprentices (over 100 people annually) work in the hotel.

The structure of the employed (on the basis of employment contract) is made up of 46% of women and 54% of men. The personnel age structure of the *Radisson Blu* hotel in Szczecin is presented in Figure 1. The data demonstrates that the average age of the employed is 35. Figure 2 shows the structure of the employed according to seniority.

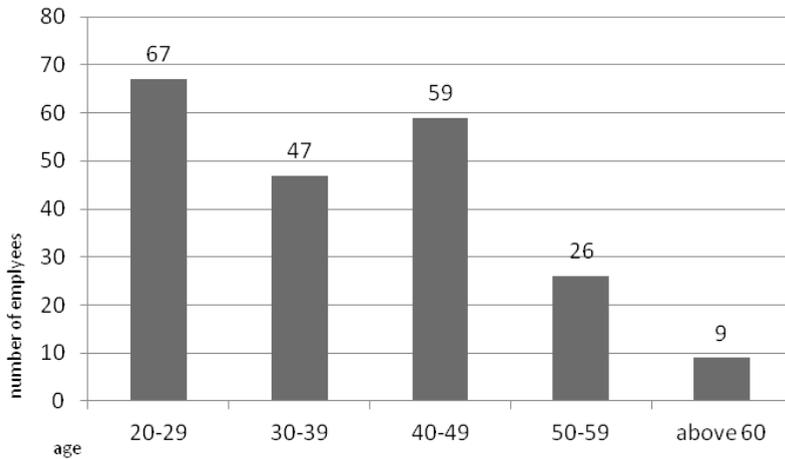


Fig. 1. Age structure of the employed in the *Radisson Blu* hotel in Szczecin (as of 30.04.2015)

Source: own work on the basis of: internal material of the *Radisson Blu* hotel in Szczecin.

As in Figure 1, a dominant age group of the employed is made up of people aged 20–29. They constitute 32% of the employed. Definitely, employees over 60 years old constitute the smallest group (only 4% of the employed).

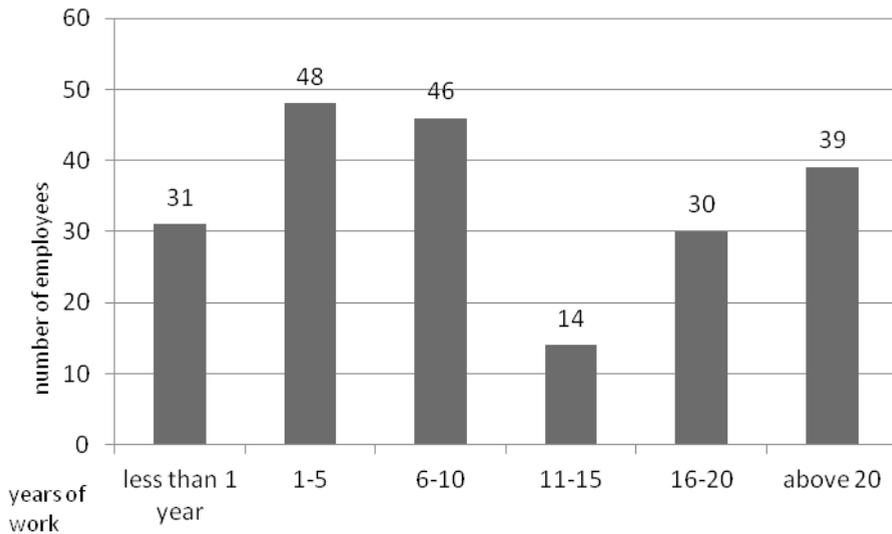


Fig. 2. Seniority structure of the employed in the *Radisson Blu* hotel in Szczecin (as of 30.04.2015)

Source: own work on the basis of: internal material of the *Radisson Blu* hotel in Szczecin.

The data presented in Figure 2 indicates that the biggest work experience of the employed is around 1–5 working years (48 people) and 6–10 working years (46 people). It is important to emphasize that the employed having more than 20–year work experience constitute a group of 39 people (19% of the employed on the basis of the employment contract).

In the *Radisson Blu* hotel in Szczecin, human resources is a very important element of its functioning, and that is a basis for appropriate human resource management and solutions in terms of the methods for motivating the hotel's personnel.

### 3. Human resource management instruments in the *Radisson Blu* hotel<sup>13</sup>

This part of the article concerns a description of the selected human resource management instruments in the chain hotel, *Radisson Blu* located in Szczecin. In it, a recruitment process, training and development of employees, incentive schemes and benefits as well as employee evaluation systems are presented.

<sup>13</sup> Own work on the basis of: internal material of the *Radisson Blu* hotel in Szczecin.

In terms of recruitment, there are two variants of recruitment for vacancies in the *Radisson Blu* hotel. The first one is the internal recruitment, or else, reaching a potential employee via a noticeboard, electronic mail or an intranet. The second is external recruitment which, in order to find potential employees, involves using such portals as: pracuj.pl, olx, infoludek, the local press and the so-called “grapevine.” In the *Radisson Blu* hotel, it is emphasized that, when it comes to issues of skills, the following motto is observed: “we hire for attitude and train for skills...” Moreover, in the hotel of *Rezidor Hotel Group*, there is a philosophy which states “Yes I Can!”

Since modern organizations function in a dynamic environment with changes much more difficult to foresee, it is required from the employed people to be more creative, flexible and innovative in their activities. The hotel services are quite specific and their appropriate execution is a great challenge to hotel personnel. A guest being away from home for a long time expects that, among others, the following needs are satisfied<sup>14</sup>:

- basic human needs (sleep, food, hygiene, silence, comfort),
- additional needs (entertainment, recreation, visiting historical buildings),
- untypical needs (new drinks, unusual dishes, meeting new people),
- urgent needs (medical help, changing staying plans).

Such a number of guests’ expectations causes that hotel personnel to be constantly available at their best and demonstrate diverse professional attitude as well as special skills. Therefore, the essential element of human resource management is training. In the analysed hotel, employees can participate in internal and external trainings.

The following internal training courses are conducted in the hotel:

- *Orientation* – training for new employees aiming is to inform them about the *Rezidor Hotel Group*, the hotel itself, working rules, privileges, etc.;
- *Yes I Can ! Delivering the Promise* – training for all employees aimed at teaching them the “Yes I Can!” attitudes and behaviours towards guests and co-workers;
- *Leading Yes I Can!* - training for the management;

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<sup>14</sup> B. Puczkowski, *Determinanty zarządzania kadrami w usługach hotelarskich*, Uniwersytet Warmińsko-Mazurski, Olsztyn 2005, p. 108.

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- *Living Responsible Business* – training for all employees which aim is to build ecological awareness and responsibility and to familiarize them with the rules of business corporate responsibility, charity activities, etc.;
  - *Leading Responsible Business* – training for the management;
  - *STAR (Supervisory Training and Resource Program)* – training for the lower management which aims at familiarizing them with the rules of human resource management;
  - *On the Job Skills Training* – training in the hotel standards of particular positions;
  - *TRICS (Threat, Risk, Incident, Crisis, Safe – Secure Hotel)* – training in the rules of occupational health and safety as well as in guest safety.

During the hotel training courses in customer service, employees are expected to understand positions of other people, prepare and present diverse arguments in order to support their positions and negotiate skilfully convincing others to verify their own judgements or to change their opinions. They have to develop new solutions, facilitate problem-solving, stimulate open discussions on the sources of conflicts as well as to recognize the best of the presented suggestions.

The external training, or the so-called *Business School*, involves training courses conducted at the *Rezidor Hotel Group* level or a regional level. These are as follows:

- *Sales Management Success* – training for sales managers;
  - *Sales Success, Negotiations Skills* – training for sales employees;
  - *Finance for Non-Financial Managers, Mastering Business Presentations* – training for the management in finance and budgeting;
  - *Manage-Lead-Succeed, Performance Management & Competency Based Interviewing Skills* – training for the management in human resource management;
  - *Train the Trainer Essentials* – training for trainers;
  - *The 7 habits of highly effective leaders* – training for the management and candidates for managers;
  - *General Manager Certification Programme* – training for candidates for the *General Managers*;
  - *LOTS (Logical Thinking System)* – training for the management.
- Employees of the *Radisson Blu* hotel can also develop their knowledge and skills through an e-learning platform.

The important element of human resource management is also developing right motivation in employees based on the incentive scheme and benefits. Motivation influences the effectiveness of activities and business decisions taken by a hotel enterprise.

In terms of the incentive scheme, a remuneration system in the *Radisson Blu* hotel in Szczecin includes a basic pay which is determined according to the categories of positions established on the basis of employees' qualifications: education, experience and additional skills identified with a held position (foreign language knowledge, use of office appliances, knowledge of computer software, courses, etc.). This incentive scheme also includes a seniority bonus (for employees with at least 3-year work experience in the hotel), jubilee awards (the first is paid after 20-year work experience, the next ones after 25, 30, 40 and 45 years of work experience) as well as funds granted as part of the Company Social Benefits Fund (it partially funds summer and winter holidays, grants home loans and aids in difficult financial situations and random incidents, partially funds events for employees and their families, funds holiday vouchers and Christmas presents for employees and their children, partially funds nurseries and kindergartens and partially funds cultural events such as cinema, theatre or concerts outings).

In terms of benefits, employees get discounts on the hotels of the chain and hotel laundry. Additionally, the employed can dine in the staff canteen paying only for the cost of the tax, deducted from their remuneration, on the value of dinners in a given month. Benefits in the chain hotel also include additional health insurance, the organization of the Christmas party for employees and their children as well as the execution of the programme, "An Employee of the Month and Year" eventuating in the best employees getting a certificate, a monetary prize, a voucher to the "Muffinek" pastry and a voucher for a stay in a selected hotel of the chain all over the world. Additional privileges of the people employed in the hotel are as follows:

- birthday cards from the Managing Director with a voucher for a birthday cake from the "Muffinek" pastry,
- special birthday cards from the Managing Director of the hotel with birthday presents for an employee;
- congratulation cards from the Managing Director and gifts on the birth of an employee's baby,
- wishes cards from the Managing Director on the wedding with a present as well as a farewell party and a retirement gift.

The last element of human resource management is employees' evaluation. This part of management is very important as it updates employees on the results of their work, so they can see the relationship between work and a remuneration and, consequently, they work better. When there is no feedback or it is delayed, the motivational effect of a remuneration decreases, even if it relates to work results.

There are three variants of employees' evaluation in the *Radisson Blu* hotel in Szczecin: after a probationary period, after the termination of a fixed term contract and the so-called "halogen" – the annual and semi-annual evaluation of managers and the annual evaluation of front-line employees.

## Conclusion

Effective human resource management, not only in a chain hotel, should result in personnel dealing with tasks they are entrusted with fast, efficiently and effectively and in a way that brings great work results. All working responsibilities in a hotel should be performed honestly and should not arouse any suspicions of partiality and self-interest. Employees should pay attention to their own unblemished reputation and of a hotel behaving in accordance with work ethic. When managing human resources, managers should skilfully and fairly treat all subordinates and should not favour any of them.

There are several ways to manage the employed people effectively. One should:<sup>15</sup>

- create a sense of security for employees,
- harmonize employees' goals with company goals,
- adequately distribute motivational factors,
- give employees of lower positions an opportunity to feel successful, too,
- arouse in employees the willingness to cooperate: more trust, less control,
- create a pleasant atmosphere in a company and develop a team of loyal employees,
- show interest in individual employees,

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<sup>15</sup> G. Boguta, *Motywowanie pracowników. 9 sposobów na sukces bez kosztów*, Wydawnictwo Wiedza i Praktyka, Warszawa 2006, pp. 3–14.

- intervene immediately in emergency cases,
- provide employees with favourable, competitive work conditions and social benefits.

To sum up, the appropriate selection of recruitment and training tools, much better use of incentives (both financial and non-financial ones) as well as an adequate system of employees' evaluation should be a given organization as only this way can enterprises, especially hotels, succeed on the market.

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## ZARZĄDZANIE ZASOBAMI LUDZKIMI W HOTELOWYCH NA PRZYKŁADZIE HOTELU RADISSON BLU W SZCZECINIE

### Streszczenie

Hotele sieciowe od hoteli niezależnych różni bardzo wiele cech. Jedną z nich jest aspekt zarządzania zasobami ludzkimi, co wynika z faktu rzetelnie opracowanej polityki kadrowej w hotelu sieciowym. Wszelkie aspekty z nią związane muszą być dokładnie określone i stosunkowo uniwersalne, gdyż dotyczą pracowników zatrudnionych na całym świecie, a więc kadr reprezentujących różne nacje, kultury, światopoglądy itp.

Artykuł składa się z trzech części merytorycznych, wstępu i zakończenia. Pierwsza część pracy ma charakter teoretyczny, w której omówiono istotę zarządzania zasobami ludzkimi i jego znaczenie w hotelarstwie. Dwie kolejne części opracowania mają

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charakter analityczno-empiryczny (w formie studium przypadku), w których scharakteryzowano podstawowe obszary organizacyjne funkcjonowania hotelu *Radisson Blu* w Szczecinie oraz konkretne narzędzia zarządzania zasobami ludzkimi w analizowanym obiekcie.

**Słowa kluczowe:** hotelarstwo, zasoby ludzkie, zarządzanie

