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Table of contents

Introduction

5

Theoretical Problems of Tourism Development

Małgorzata Januszewska, Daria E. Jaremen, Elżbieta Nawrocka

The Innovation System of a Tourist Enterprise – a Model Approach 7–18

Leszek Koziół, Anna Karaś

The Concept of the Tourism Enterprise Innovation Analysis 19–29

Anna Królikowska-Tomczak

The Sustainable Management of Tourism as Part of the Innovative Region Management
Based on the European Tourism Indicators System for Sustainable Destinations 31–44

Mariusz Miedziński

The Creation of the Model Threshold Tourist Area Life Cycle
of the Functional Urban Area of Kołobrzeg 45–62

Functioning of Tourism Market

Maria Hełdak, Eleonora Gonda-Soroczyńska

The Curative Function of the Village – Infrastructure, Environmental Resources,
Curative Materials 63–74

Mirosław Marczak

The Analysis of the Tourism Promotion System in Poland as Compared
to the French Model of “Institutional Promotion” 75–87

Ewa Pałka

The Financing Needs of Agritourism Farms in the Świętokrzyskie Province 89–98

Anna Przybylska

Using the Internet in the Decision Making Process Concerning
the Purchase of Tourist Offers 99–108

Mariusz Sołtysik, Justyna Cieplik, Wojciech Fedyk, Piotr Oleśniewicz

The Suburban Areas of Tourist and Recreation Reception in the Opinion of Users.
A Comparative Case Study 109–122

Regional Aspects of Tourism

- Alicja Gonia, Hanna Michniewicz-Ankiersztajn, Anna Dłużewska
The Tourism Potential of Counties Located in the Kuyavia-Pomerania
and Pomerania Provinces in Respect of Waterways Revitalisation 123–141
- Iwona Kiniorska
The Selected Aspects of Tourism Development – an Example of the Świętokrzyskie
Province 143–156
- Barbara Mastalska-Cetera, Piotr Krajewski
The Tourist Trails Development in the Protection Plans of the Lower Silesian
Landscape Parks 157–168
- Anna Gardzińska, Beata Meyer, Agnieszka Sawińska
The Entity Structure of the Cross-Border Tourism Product 169–182
- Katarzyna Przybyła, Jan Kazak
The Transformation of the Tourism Function of the Selected Jelenia Góra
County Areas 183–191
- Joanna Zielińska-Szczepkowska, Małgorzata Samusjew
Tourism Activity among Seniors: A Case-Study from Warmian and Masurian
Voivodeship 193–204

INTRODUCTION

The significance of tourism in the modern world is continuously increasing, mainly due to the changes in the preferred style of living of the developed societies. The transformations promoting a healthy and pro-ecological style of living result both in the changes in ways of spending free time (spending free time actively instead of passive leisure) and an increase of expectations concerning the quality of the natural environment in a tourism region. Simultaneously, tourism activities have become a standard element of a style of living and happen several times a year. The tourism development is still progressing despite many changes in global economy (frequently negatively, it seems, affecting tourism); a fact which confirms tourism's great significance for the functioning of both societies and modern economy. Yet another issue is the relation between tourism and the natural and cultural environment of tourism reception areas whose sustainable nature makes tourism develop further. The complexity of tourism and its interdisciplinary nature are the reasons behind the steady rise in the research interest of various fields of science, especially economic sciences, in problems of tourism. Such a rise is owed to an increasing impact of the tourism sector on the level and nature of the economic development, both on the local and regional as well as global levels.

The series "Economic Problems of Tourism" issued within *The Zeszyty Naukowe Uniwersytetu Szczecińskiego* (*The Scientific Journal of the University of Szczecin*) is a platform for exchanging scholarly views and presenting research findings and achievements of scientists for whom tourism, especially in terms of economy, is the main subject of scientific interest. However, multiplicity and diversity of aspects of human tourism activity, its reasons and effects make it remain a field of interest of the researchers representing diversified fields of science, including economy, law, geography, or physical culture.

The series "Economic Problems of Tourism" within *The Zeszyty Naukowe Uniwersytetu Szczecińskiego* (*The Scientific Journal of the University of Szczecin*) present the research findings and achievements of scientists from Polish and foreign academic centres. The current issue of the journal presents tourism in terms of the three areas: theoretical aspects; functioning of the tourism service market; and regional problems of tourism development.

Beata Meyer

THE INNOVATION SYSTEM OF A TOURIST ENTERPRISE – A MODEL APPROACH

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KEYWORDS | innovation model, tourist enterprise, innovation system of a tourist enterprise

ABSTRACT | The objective of the paper attempting to construct a model of the tourist enterprise innovation system, which allows explaining the mechanism of innovation activities in tourism. The basic research method used is the subject literature analysis. The modelling is based on a descriptive method derived from the deduction method. The result of conducted research is a proposal of an innovation system for a tourist enterprise (ISTE). The presented paper is both a review and theoretical study.

Introduction

The world literature offers numerous studies covering the problem of innovations and their implementation in enterprises representing various branches. In the field of tourism an extensive input in understanding the essence of innovations and innovativeness has been made by e.g.: A.M. Hjalager, X. Decelle, M. Peters, B. Pikkemaat, P. Jones as well as S. Nordin and B. Svennson. In Poland the following authors conduct in-depth studies on the innovation problems in the area

of tourism economy: M. Bednarczyk and her team, E. Szymańska, E. Panfiluk and also the research workers at the Department of Marketing and Tourism Economy Management of Wrocław University of Economics. The research on innovativeness of tourist enterprises is most frequently concentrated on innovation characteristics and types, its description, organization, innovation process effects, distinguishing differences between production and service oriented innovations, innovation strategy identification, its success factors, as well as the role of a client and company staff in the course of innovation processes. Much emphasis is placed on the spatial aspects related to innovations in tourism economy. The efforts to diagnose the functioning system of an innovative enterprise are undertaken less often. It happens so, because in most cases an innovation process is analyzed as the sequence of activities of a regulatory and real nature. Despite the above-mentioned examples of the conducted research and studies on tourism sector innovativeness, they still remain quite rare and hence the need for more. While trying to fill in this gap the authors attempted constructing model of the tourist enterprise innovation system, which is also the primary purpose of this article.

The theoretical background of systemic approach to innovation in economic science has been applied in e.g. the theory of innovation as interactive learning and economic theories of evolution. Interactive learning is based on experimenting in the process of knowledge production consisting in the division disappearance between those who “produce” it and those who undergo the process of learning. As a result an innovation process remains a learning process. On the other hand, in the case of the evolution oriented model for innovation creation process it is the solution to a specific problem which is analyzed and developed. New ideas, constituting its solution are of diverse quality. Some of them are based on old (reproduction) and others on better (selection) solutions. The directions of changes in presented ideas, i.e. the launched products are characterized by different competitiveness. New solutions are based on the existing ones in the sense that sales revenues from the old products finance the innovative ones.¹

The basic research method, applied for the needs of the research problem analyzed in the presented article, is the subject literature review in search of the theoretical background explaining the problem of innovation, with particular emphasis on innovation in tourism and the results of research on enterprise innovativeness confirming the innovation theories described in the literature. The following assumptions have been adopted in the model construction process referring to an innovation system of a tourist enterprise: regarding a tourist enterprise model – an economic and organizational model of an enterprise has been selected, and in terms of an innovation model – the model of systems integration and networking is applied. The discussion also covers cooperation networks as an important dimension of innovation activity. The modelling is based on a descriptive method derived from the deduction method. The constructed model is of explanatory nature. The data necessary for model construction originate from secondary sources. As a result of the

¹ R. Galar, *Gospodarka oparta na wiedzy i innowacje przełomowe*, in: *Gospodarka oparta na wiedzy – wyzwania dla Polski XXI wieku*, ed. A. Kukliński, Warszawa 2001, p. 153.

conducted research the proposal for an innovation system model of a tourist enterprise (ISTE) is presented.

Innovation models – theoretical discussion

The term “innovation” originates from Latin “innovates”, i.e. renewal, creating something new. In Poland this concept is defined as “introducing something new, the newly introduced conception, a novelty, a reform.”² The colloquial understanding of this word refers to something new and different from the existing solutions; it is associated with the need to introduce changes for better³ and is very often used as the synonym of the word “change.”

The subject literature emphasizes the problem of various definitions associated with the term “innovation”, as well as freedom of its interpretation.⁴ The multitude of definitions referring to the innovation concept and the absence of the commonly accepted theories in this matter confirm that the research on this problem is still valid and indispensable, as well as expected.

In the 1990s two crucial transformations in the way of approaching innovation were observed. Firstly, the opinions were expressed that service-oriented innovations very often played an extremely important role in an innovation process (presented in its macroeconomic aspect), which changed, to an extent, the perception of service providing entities, including the ones representing tourism sector, as the recipients of innovations created by others. Secondly, the opportunities for innovation activities were recognized in other areas rather than technological ones only, which resulted in an increased importance of changes implemented by the service sector.

The service-oriented innovation can be understood as an effect of the change process, or the process itself, related to a product and characterized by high element of immateriality, the need for direct contact between a service provider and a customer, an integration of external factors combined with service heterogeneity, resulting from high personal contribution of the human factor.⁵

At the background of the existing definitions⁶ of innovations the researchers analyzing this problem take up adequate attempts to explain the mechanism of innovation construction in the form of models. These models are characterized in Tables 1 and 2. Generally, they are divided into linear models, also referred to as classical ones, and complex models (including e.g. integrated, open, coupled and distributed models).

² *Słownik wyrazów obcych*, ed. J. Tokarski, PWN, Warszawa 1980, p. 307.

³ W. Janasz, K. Koziół, *Determinanty działalności innowacyjnej przedsiębiorstw*, PWE, Warszawa 2007, p. 11.

⁴ J. Penc, *Innowacje i zmiany w firmie*, Agencja Wydawnicza Placet, Warszawa 1999, p. 143.

⁵ C. Küpper, *Service Innovation – A Review of the State of the Art*, Working Paper Series LMU, University of Munich, Institute for Innovation Research and Technology Management, Munich 2001, p. 19.

⁶ The presented article does not provide the review of innovation definitions, since they are broadly discussed in many publications in the field of economics and management.

Table 1. Review of linear innovation models

Model type	Model characteristics	Leading representatives
Technology push model	Starting point for changes is the development of science and technology, which allow innovations. The role of the market is reduced to accepting, in advance, the changes applied in products or processes. The approach is close to the neoclassical theory of market failure, primary research is the driving force of innovations, while the role of the market is passive	Ch. Freeman, J. Ronayne
Demand pull model	Innovation is the reaction to the size and structure of demand, the development of marketing and quality management concept. Market plays an active role, whereas knowledge is a passive factor	J. Schmookler, R.L. Daft, R. Williams, D. Edge, P. McGowan
Demand-supply model	Emphasizes feedback between the particular stages of innovation process and also interactions between market, science and enterprise. Models focus on the role of knowledge and enterprise resources. Combining technical possibilities of an enterprise and market needs remains the essence of this process	S.J. Kline, N. Rosenberg, C. Wessner, R. Rothwell, W. Zegveld

Source: authors' compilation based on: M.S. Lewandowska, *Innowacje otwarte polskich przedsiębiorstw*, „Gospodarka Narodowa” 2014, nr 2, pp. 53–80; J. Perenc, J. Hołub-Iwan, *Innowacje w rozwoju konkurencyjności firm*, Wydawnictwo C.H. Beck, Warszawa 2011, pp. 55–57; J. Czerniak, *Polityka innowacyjna w Polsce, analiza i proponowane kierunki zmian*, Difin Warszawa 2013, pp. 20–29; A.H. Jasiński, R. Ciborowski, *Ekonomika i zarządzanie innowacjami*, Wydawnictwo Uniwersytetu w Białymstoku, Białystok 2012, pp. 49–57; E. Szymańska, *Procesy innowacyjne przedsiębiorstw świadczących usługi w zakresie organizacji imprez turystycznych*, Oficyna Wydawnicza Politechniki Białostockiej, Białystok 2013, pp. 70–85; A.H. Jasiński, *Innowacyjność w gospodarce Polski, modele, bariery, instrumenty wsparcia*, Wydawnictwo Naukowe Wydziału Zarządzania Uniwersytetu Warszawskiego, Warszawa 2014, p. 16; S. Waresa, *Systemy innowacyjne we współczesnej gospodarce światowej*, Wydawnictwo Naukowe PWN, Warszawa 2012, pp. 35–38.

Table 2. Review of complex innovation models

Model type	Model characteristics	Leading representatives
1	2	3
Integrated model	At least two integrated subsystems operate accordingly. Innovations result from sequential exchange of information between marketing, production and R&D specialists. They are based on interfunctional organization and team work and also company staff creativity. Its purpose is the optimization of internal innovation processes in an enterprise	H.K. Tang
Open model	Innovation activities based on the concept of knowledge management. Innovation processes implemented in cooperation with different business environment. It is crucial to protect intellectual property. The following principle should be listed in terms of open innovations: <ul style="list-style-type: none"> – a company is not able to employ the best specialists, thus it searches for partners in its environment, – external research and development work is crucial, – an enterprise does not have to initiate research works to benefit from them, a success can be achieved through combining internal and external ideas, – constructing an effective business model is more important than being the first 	H. Chesbrough, S.J.H. Graham, D.C. Mowery

1	2	3
Model of systems integration and networking	Market factors and higher customers' awareness play the crucial role in an innovation process. Innovation models are constructed in the form of a network (networking). Establishing networks is easier owing to ICT and the Internet. Network management resembles simultaneous management of numerous businesses through a continuous search for the possibilities of the most favorable allocation of innovation potential components. The development of management systems and the increasing number of horizontal and vertical agreements remain the reasons for model construction	R. Rothwell
Distributed innovation model	Model is concentrated on open innovation based on H. Chesbrough's proposal, however, it criticizes confidence as the basis for open innovation success. The model assumes more distributed leadership structure based on individuals presenting skills in influencing others. It requires knowledge flow between various entities to open opportunities for creating innovations	P. Hoberaft

Source: authors' compilation based on: M.S. Lewandowska, *Innowacje otwarte polskich przedsiębiorstw*, „Gospodarka Narodowa” nr 2, pp. 53–80; J. Perenc, J. Hołub-Iwan, *Innowacje w rozwoju konkurencyjności firm*, Wydawnictwo C.H. Beck, Warszawa 2011, pp. 55–57; J. Czerniak, *Polityka innowacyjna w Polsce, analiza i proponowane kierunki zmian*, Difin, Warszawa 2013, pp. 20–29; A.H. Jasiński, R. Ciborowski, *Ekonomika i zarządzanie innowacjami*, Wydawnictwo Uniwersytetu w Białymstoku, Białystok 2012, pp. 49–57; Szymańska, 2013, pp. 70–85, A.H. Jasiński, *Innowacyjność w gospodarce Polski, modele, bariery, instrumenty wsparcia*, Wydawnictwo Naukowe Wydziału Zarządzania Uniwersytetu Warszawskiego, Warszawa 2014, p. 16; S. Waresa, *Systemy innowacyjne we współczesnej gospodarce światowej*, Wydawnictwo Naukowe PWN, Warszawa 2012, pp. 35–38.

P. den Hertog, having considered the specific nature of service providing businesses, constructs five models covering innovative behaviors of service enterprises. They are distinguished in terms of innovation sources (Table 3). P. den Hertog's comments and observations can also be directly referred to tourist enterprises.

Table 3. Innovation models of service companies by P. den Hertog

Model	Characteristics	Comments
1	2	3
Supplier-dominated innovation)	Innovations in services are created based on technological innovations offered by the industry sector, launched at the market by manufacturing companies	The paradigm of industrial innovations is the dominating one (service providing companies remain the consumer of innovations and a passive component of an innovation system). Such innovations have to be modified quite often due to the differences between production and service oriented innovations
Innovation within services	Innovation is initiated and implemented by a service company itself and is related to typical service functions, e.g. creating a new product, a new package of services or a distribution system	Company intellectual capital and its internal innovation activities are of crucial significance
Client-led innovation	A service company responds to the needs expressed by clients	Based on J. Schmookler's concept it can be stated that an enterprise creates inventions as the reaction to client's (consumer's) needs and imposed by a client (consumer)
Innovation through services	A service company generates innovations introduced in a given service enterprise	Referring to the concept of H. Chesbrough's open innovations it can be stated that the diffusion of innovations in service sector remains the primary source of innovations in services

1	2	3
Paradigmatic innovation	All entities connected with a particular activity influence the development and implementation of innovations or are forced to assimilate them	This model applies the concept of a coupled system, where innovations are created as the effect of globalization, computerization and human capital development, they combine technical possibilities of an enterprise and market needs

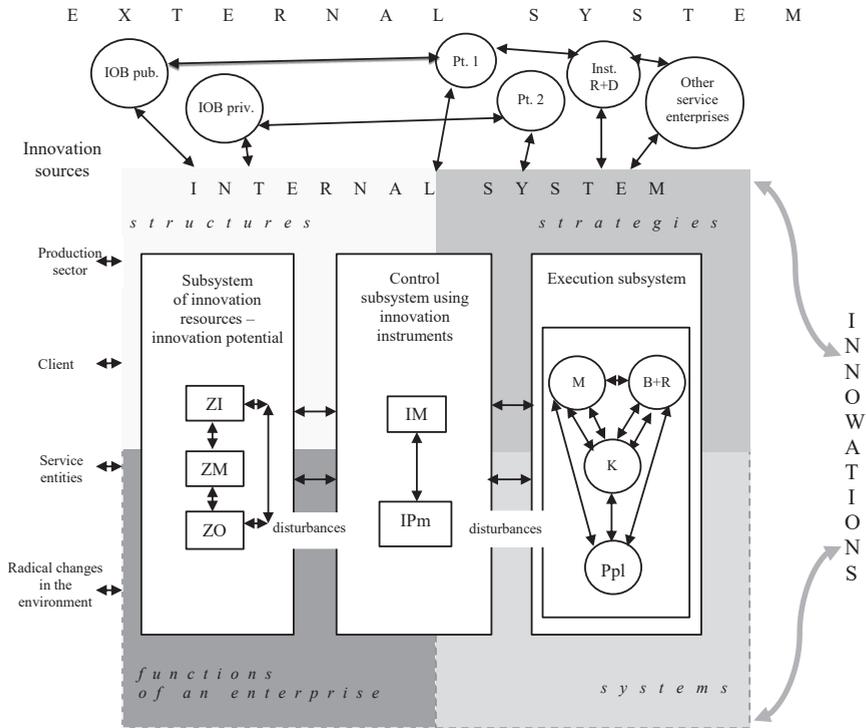
Source: authors' compilation based on: P. den Hertog, *Knowledge-Intensive Business Services as Co-producers of Innovation*, "International Journal of Innovation Management" 2000, Vol. 4, No. 4, pp. 491–528; J. Howells, *Innovation and Services: New Conceptual Framework*, CRIC Discussion Paper No. 38, August 2000, p. 5.

The above presented review of models has allowed for identifying the ones which best reflect the specific nature of innovation activities in tourism. Therefore, the following models have been considered: integrated systems and networking, open innovations by H. Chesbrough and innovation sources in services P. den Hertog.

Innovation system model of a tourist enterprise – the authors' proposal

The systemic approach to the description of enterprise functioning in economic sciences gained the greatest popularity in the 1960s in the period of large, international, industrial organizations' management. At that time organizations presented the form of a social and technical centrally managed system. The system was understood as a linear input and output arrangement (the system had explicit boundaries against the supra-system – environment). In the 1980s, in the so-called school of organizational games, conflicts occurring in organizations and having impact on their functioning were noticed, whereas in the school of organizational balance an organization was observed as the system aimed at such balance against the interfering factors. A. Kołodziejczyk emphasizes that the most recent systemic approach in economic sciences is related to the school of established internal and inter-organizational networks. The systemic approach, applying the network concept, remains the theoretical background of the constructed integrated and networking models as the ones which best describe the processes occurring within them. The basic assumptions of the systemic approach became the conceptual basis for an innovation system model of a tourist enterprise (ISTE). This system does not operate in a vacuum, since it is influenced by the arrangement of many components in an enterprise. Therefore, in the conception phase of ISTE model construction it was necessary to select the model of an enterprise. The subject literature offers different models of an enterprise, among which the models broadly described by T. Gruszecki are listed, i.e. an economic model and an organizational model. In the case of an economic model the system is perceived in efficiency categories, which means the difference between resources (outlays) and their combination effect, whereas an organizational model presents an enterprise in such categories as e.g.: functions, strategies, values, structures, systems and information streams. These components have impact on innovation creation in a tourist enterprise.

The model discussed in the article (Figure 1) is of interdisciplinary nature, most appropriate to describe complex phenomena occurring in the functioning of an enterprise, also including a tourist enterprise.



Explanatory notes:

ZI – subsystem of intellectual resources

ZM – subsystem of material resources

ZO – subsystem of organizational resources

IM – subsystem of material instruments

IPm – subsystem of non-material instruments

M – marketing staff

Inst. B+R – R&D units

subsystem

B+R – innovation specialists

Ppl – front staff

K – client

IOB – business environment institutions

Pt – tourist enterprise

knot with relations

direction of support-information flow or knowledge transfer

Figure 1. Suggested innovation system model of a tourist enterprise

Source: the authors' compilation.

ISTE constitutes a set of components connected with each other by means of relations in the way which forms a unity capable of innovation activity. Mutually related systems, i.e. an internal and external one, were distinguished in it. The internal system is made up of the following subsystems: innovation resources (innovation potential), control (using innovative instruments) and execution system, while the external one consists of an institutional subsystem made up of the network of institutions in a public and/or private sector and their mutual interactions. ISTE covers organizational units and employees creating inter-functional teams in an internal system, as well as e.g. business environment institutions, universities, research centers, tourist enterprises and other economic entities, public authority entities – in an external system. The innovation-oriented activity of a tourist enterprise should be understood as the set of attitudes and activities in an execution sphere, but also in the sphere of innovation potential creation and development as well as innovation instruments' application and selection, resulting in networking stimulation in an inter-functional organization of a tourist enterprise, as a result of which an innovation (technological, organizational, marketing, social) is created. The innovation activity remains the effect of interactions with external system components. An innovation system creates a specific mechanism of relations between its elements and makes their impacts both complex and integrated.

The innovation potential of an enterprise (subsystem of innovation resources) can be interpreted as the arrangement of internal conditions and characteristics of a particular entity, which allows creating and developing innovations. It is made up of three subsystems, i.e. the subsystem of intellectual resources, the subsystem of material resources and the subsystem of organizational resources. The area of intellectual resources covers abilities, skills, knowledge, creativity presented by employees, and primarily their ability to establish a network, to absorb knowledge, its "anchorage" and distribution inside an innovation system. The subsystem of material resources includes e.g.: gastronomic equipment, buildings, constructions, in-room furnishings. The subsystem of organizational resources comprises e.g.: formal and informal organization of an enterprise, organizational structure, innovation strategy, service process organization. The research conducted by the team from University of Applied Sciences in Münster⁷ confirms that not all resources are equally important for an innovation process. Among the most important components of intellectual resources subsystem the following are included: employment strategy, diversification of internal resources and communication with the environment. With reference to the subsystem of organizational resources the authors have emphasized the role of: internal communication, management support and employees' motivation, whereas in case of material resources subsystem they distinguished: optimal financial resources and adequate equipment.

The innovative activity is stimulated by means of material and non-material instruments constituting basic elements of the control system. Based on the assumptions of management theory, they include: strategies, methods and models for innovation management. In accordance with the

⁷ D.M. Leich, S. Gökduman, T. Baaken, *Service Innovation, Project Report*, University of Applied Sciences, Münster 2010, www.science-marketing.com.

above-mentioned research, conducted by German experts, staff motivating methods remain the most important instrument.

The execution subsystem has been presented in the form of a network. Having considered the specific nature of tourist enterprises, attention should be paid to relations between R&D and marketing personnel, and also front staff, who take the role of innovation co-creators. Based on P. den Hertog's conception, an opinion can be expressed that the role of a client at the contemporary tourism market has been evolving. A client is no longer a participant of a purchase – sale transaction, but takes the role of an active player and the subject influencing an enterprise offer by participating in creating innovations. The client's knowledge internalization and his/her participation in innovations' creation is possible as a result of introducing adequate conditions in the social environment of a tourist enterprise. Among the most important ones the following can be listed: combining tasks related to knowledge management, to marketing and customer service, to the implementation of customer relations management system, client's access to company knowledge by means of client coaching, lists and discussion forums, website allowing knowledge sharing with a client, company operations transparency, e.g. presenting threats related to the consumption of tourist services, online exchange of experiences and knowledge transfer harmonization in an enterprise, between an enterprise and clients as well as between company clients.⁸

Each system is subject to certain disturbances resulting in the higher risk and uncertainty in innovation activities carried out by an enterprise, which can be divided into disturbances in an internal or external system (Picture 1 presents internal system disturbances only). Based on the analyses conducted in service sector of the EU⁹ countries and microenterprises in Poland¹⁰, the first group covers mainly the following:

- insufficient financial means,
- high costs of innovation implementation,
- insufficient level of employees' qualifications and knowledge, unfavorable organizational structures,
- resistance to change among staff, reducing the tendency for innovation oriented behaviors.

Among the disturbances in an external system the following have to be listed:

- high level of risk resulting from innovation implementation,
- low demand for innovations, unfavorable policy carried out by the State and local authorities,
- innovation protection problems – easy to imitate.

Based on P. den Hertog's conception of innovation sources, their four external sources can be distinguished (i.e. production sector, client, service providing entities and radical changes in the environment) and also one internal source related to innovation potential. In practice not all

⁸ C.K. Prahalad, V. Ramaswamy, *Przyszłość konkurencji*, PWE, Warszawa 2005; *Kulturowe kadrowe problemy internacjonalizacji przedsiębiorstw*, ed. P. Wachowiak, SGH, Warszawa 2008; *Europejskie wymiary przedsiębiorczości*, eds. H. Kruk, K. Skrzyszewska, Akademia Morska, Gdynia 2008, G. Probst, S. Raub, K. Romhardt, *Zarządzanie wiedzą w organizacji*, Oficyna Ekonomiczna, Kraków 2002.

⁹ *Innowacje w zrównoważonym rozwoju organizacji*, ed. W. Janasz, Difin, Warszawa 2011, p. 195.

¹⁰ M. Juchniewicz, B. Grabowska, *Innowacyjność mikro-przedsiębiorstw w Polsce*, PARP, Warszawa 2010, p. 57.

sources are equally important, which has been confirmed by numerous studies covering tourist enterprises. The authors' own research, performed in the period 2006–2010, is worth mentioning. The exploration covered the group of enterprises representing such branches as hospitality, gastronomy, spa industry and travel agencies. It should be emphasized that the results obtained are neither comparable nor representative, but they can serve as a good practical illustration to be used as an incentive for further, in-depth research on innovation sources of tourist enterprises. The research, conducted in 2006, has proved that the Internet, clients, professional journals and counterparties remain the primary innovation sources in tourist enterprises.¹¹ On the other hand, the research conducted in 2008, in public spa enterprises, showed that professional experience of staff and managers, courses and trainings and also the Internet¹² were the most important factors in an innovation process. The analyses performed in 2010, covering hospitality and gastronomy enterprises, allowed to distinguish: clients, owner's creativity, the Internet, employees and competitors as the main innovation sources.¹³ It can be generally stated that the sources in an innovation process are of both internal and external nature and mainly take the form of knowledge acquired by employees and managers, clients, competitors and counterparties, which remains in line with P. den Hertog's conception.

Final remarks

The discussed innovation system of a tourist enterprise is the authors' attempt of a research problem presentation due to the absence of comparative material originating from tourism sector (research in the area of innovation is dominated by production companies or high-tech sector institutions). Currently, the process-oriented approach is the dominating one in the innovation research, which in Polish subject literature is presented by e.g. E. Szymańska.¹⁴ The authors' approach emphasizes the systemic presentation revealing the complexity of innovation processes, their dependence on various factors and components of internal and external systems in a tourist enterprise. In accordance with the systems theory assumptions as well as different conceptions and approaches to innovation problems and their generation presented in the research environment, the suggested innovation system model of tourist enterprises remains the subsystem of a larger supra-system, referred to as an external one, which is made up of many subsystems and functions in the environment of other systems in an organization (e.g. marketing, personnel, financial, etc. systems) and enters into various interactions with them. It is an open system, which cooperates with the

¹¹ K. Perechuda, E. Nawrocka, *Zarządzanie informacją i wiedzą jako instrument uzyskiwania przewagi konkurencyjnej podmiotów gospodarki turystycznej*, Ekonomiczne Problemy Turystyki nr 7, Zeszyty Naukowe Uniwersytetu Szczecińskiego nr 429, Szczecin 2006, pp. 237–244.

¹² M. Januszewska, E. Nawrocka, *Rola klienta w działalności innowacyjnej przedsiębiorstw uzdrowiskowych w Polsce*, in: *Turystyka uzdrowiskowa. Stan i perspektywy*, ed. M. Boruszczak, Wyższa Szkoła Turystyki i Hotelarstwa, Gdańsk 2009, pp. 217–230.

¹³ A. Rapacz, D.E. Jaremen, *Empirical Analysis of Selected Attributes of Innovation in Karpacz Tourist Enterprises*, "Management" 2011, Vol. 15, No. 2, pp. 256–270.

¹⁴ E. Szymańska, *Procesy innowacyjne przedsiębiorstw świadczących usługi w zakresie organizacji imprez turystycznych*, Oficyna Wydawnicza Politechniki Białostockiej, Białystok 2013.

systems functioning in an external environment of an organization. A client occupies an important place in this system, since he/she is not only an innovation addressee or its source, but also an active participant of innovation processes occurring in a tourist enterprise.

The suggested model has certain limitations, among which the most important ones are as follows: no empirical verification of the established subsystems and relations, the selection of innovation model, the choice of an enterprise model. Nevertheless, the performed studies resulted in developing a theoretical background for analyzing an innovation system functioning in tourist enterprises in Poland.

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SYSTEM INNOWACJI PRZEDSIĘBIORSTWA TURYSTYCZNEGO – UJĘCIE MODELOWE

SŁOWA KLUCZOWE

model innowacji, przedsiębiorstwo turystyczne, system innowacji przedsiębiorstwa turystycznego

STRESZCZENIE

Celem artykułu jest podjęcie próby budowy modelu system innowacji przedsiębiorstwa turystycznego, pozwalającego wyjaśnić mechanizm działań innowacyjnych w turystyce. Podstawową metodą badawczą była analiza literatury. Modelowanie oparto na metodzie opisowej, której podstawą jest metoda dedukcji. Efektem procesu badawczego jest propozycja modelu systemu innowacji przedsiębiorstwa turystycznego (SIPT). Artykuł ma charakter przeglądowo-teoretyczny.

THE CONCEPT OF THE TOURISM ENTERPRISE INNOVATION ANALYSIS

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KEYWORDS

innovations, potential for innovation, innovation capability, tourism businesses

ABSTRACT

The aim of the paper is to present the analysis concept focused on the evaluation of company innovation capability. The innovative enterprises potential in tourism industry is the evaluation starting point, with regard to the innovation system of a company. An important research tool is the analysis of the relationship between resources and capabilities showing a causal relationship between these categories. The qualitative measurement procedure of the enterprise innovation capability has been described in the article and steps to verify that capability have been provided. The further part of this article presents the results of the empirical research on innovation of 12 tourist companies. It has been demonstrated that the key determinants of this ability are the employee as well as managerial competences in the frames of innovations, cooperation with customers and collaborators in terms of knowledge, innovation-oriented organizational culture and the use of IT tools. In the light of the given, own, empirical research results and also the predecessors' research results, it can be presumed that companies compete with one another through the created innovation as well as their innovative capability. The innovative capability assessment may be useful in determining the competitive and strategic enterprises position in a given sector.

Introduction

The presented concept assumes that innovation is any beneficial, creative and original change in different areas of the organization. The change that brings novelty and progress in relation to the positively assessed status quo, in the light of the criteria for the organization effectiveness. In contrast, the innovation (innovation system) means both the innovation potential of the company and its innovation capability. As a refinement of the concept, the C.M Hall and A.M Williams

thesis have been adopted. According to it, the innovation system is defined as the organizing and positioning of actors, i.e. companies and other organizations that participate in generating, diffusion and use of novelties (new knowledge) useful and bringing economic benefits the manufacturing process.¹

It should be noted that such a presentation of the essence of innovation and enterprise innovativeness is based on an interdisciplinary and multi-faceted approach, engaging the causal impact of various phenomena and processes for innovation. However, the research on organizations innovativeness system requires a new perspective on the subject. Namely, the analysis of the field extension of the problems of innovativeness understood as the potential for innovation on the one hand, and at the same time, of the innovative activity issues, i.e. the innovation capability, invention and diffusion of innovation on the other hand.

The innovative potential of enterprises has been defined as a set of socio-economic characteristics, shaped in the development of the company, which are the basis for his innovative activity. In particular, these are the developed resources such as tools, processes, structures, relationships and other factors inherent in the company.

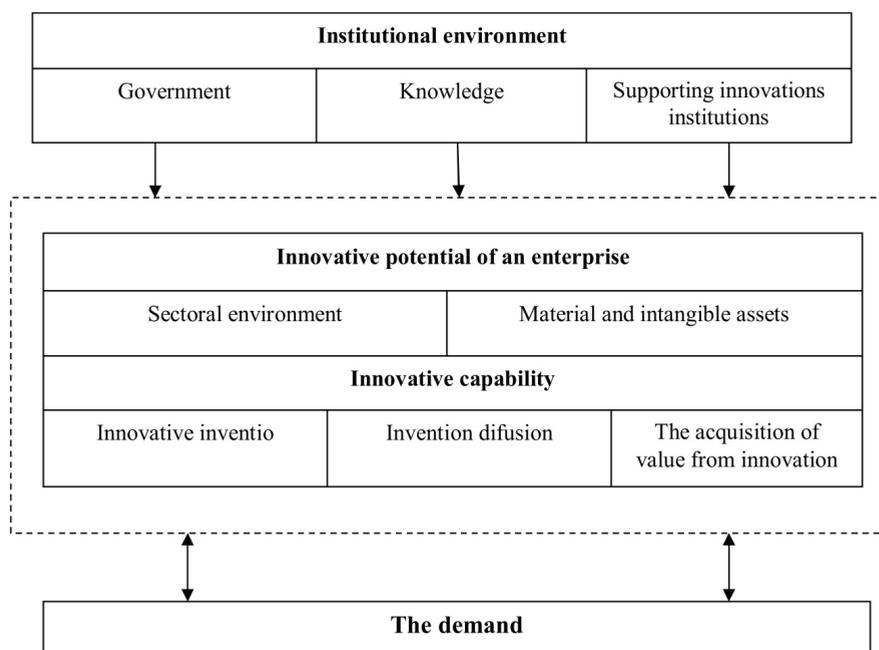


Figure 1. Innovative potential and innovative capability within the system of innovativeness

Source: L. Koziol, A. Wojtowicz, A. Karas, *Postępowanie badawcze ewaluacji zdolności innowacyjnej przedsiębiorstwa*, in: eds. *Stabilność organizacji we współczesnej gospodarce*, M. Cisek, T. Nowogródzka, Studio Emka, Warszawa 2014, pp. 48–57.

¹ C.M. Hall, A.M. Williams, *Tourism and Innovation*, Routledge, New York 2008, p. 24.

The innovative potential is also determined by the environment sector, mainly the market and that is the company with customers, competitors, suppliers and cooperators (including in particular the relationships that link the company with its key stakeholders), because the innovations particularly appear or are discovered in contact with the market. The institutional environment has a significant impact on this potential, in particular the development of new technologies, social changes, change of the market shape, legislative regulations, and more.

The effectiveness of the company in terms of innovation (innovation performance) is determined by the resources developed in the past (potential for innovation), as well as the appropriate methods, skills and their current use (innovative capability). The authors dealing with this subject explain that it is the ability to create something new or to introduce significant changes, acting in a way that exploits the ability.²

While presenting the innovative capability issue it is worth emphasizing the importance of knowledge in its creation. It is, above all, the knowledge accumulated by the company in the course of organizational learning, the knowledge of deliberate creation which allows the effective use of innovative potential (resources) for its innovation activity, knowledge and knowledge management included in the patterns and economic pragmatism which is the major causative agent of progress and favorable changes, it is the company innovative capability.³ Modern organizations, however, are still looking for significant and lasting links between knowledge, knowledge management and innovative capability, and even attempts are being made to identify and determine the impact of various forms of information and knowledge on the kind of innovation.

The issues described in the introduction are the basis for further analysis presented in this article, and in particular the concept of a description of the innovation and the innovation process, identification and characterization of potential determinants of innovation (innovation potential) of the Little Poland region tourism enterprises, the assessment of the innovation (innovation capability), and the assessment of enterprise innovation system (innovation performance).

Concept thesis and stages of research

The cognitive aim (methodology) of this article is to present the concept of the analysis focused on the innovative capability of a tourist company evaluation. The starting point for the estimation is the innovative potential of the surveyed enterprises, while the reference is an enterprise innovativeness system. The practical aim of this thesis is to present the results of empirical research.

The basic problem that is described in this paper, is an identification of the innovation potential determinants and assessment of their effectiveness as a prerequisite for the development of the innovative capacity and the support of tourist enterprises innovativeness. The objective of

² M.F. Hiliami, T. Ramayah, Y. Mustapha, S. Pavanchlik, *Product and Process Innovativeness: Evidence from Malaysian SME's*, "European Journal of Social Science" 2010, Vol. 16, p. 557.

³ Defining this issue more specifically, it is assumed that knowledge is the ability to take action, in particular innovative activity [cf. T.H. Davenport, L. Prusak, 2000, pp. 185–199]. In the companies' practice the creating of knowledge is equated with innovation [cf. R. Pace, A. Dipace, 2014, pp. 185–199, M. Zastempowski, 2013, pp. 68–75, M. Pichlak, 2012, pp. 128–135].

the research presented in this way required to develop the concept of diagnostic analysis aimed at evaluating the potential and innovative capability of the company. An important research tool is the analysis of the relationship between resources and capabilities, which shows a cause and effect relationship between these categories. In the thesis, the following concepts are assumed:

- Innovative capability is a function and at the same time the criterion of an innovation companies evaluation system, as well as the possibility of stimulating innovative activities.
- Innovative capability can be considered partially (which correspond to the determinants of this ability), or it can be recognized as an aggregate form for the company or the whole branch of industry.

During the research procedure the following steps have been distinguished :

1. Identification of the subject and scope of analysis.
2. Formulation of dimensions (criteria) of the innovation potential.
3. The quality level of innovative capabilities measurement
4. Categorization of enterprises.
5. Verification

Identification of the subject and scope of analysis

In order to assess the innovation capability of enterprises the surveys, attended by 316 business entities from the Little Poland region, have been conducted. Among all the respondents 12 companies operating in the tourism industry have been distinguished. The study was conducted in the years 2012–2013.

The questionnaire includes the questions about the general characteristics of the company, identifying the number and innovation, forms of cooperation between enterprises in the field of innovation and knowledge, changes in the market and increased competition that affected the competitiveness of tourism enterprises, questions about the description of the significance of legal regulations and the most significant features of the enterprise – determinants of its innovation – i.e. tools, processes, relationships, competence of development and use of innovations.

In light of the above remarks, the innovative capability has been analyzed in an aggregate form. The aggregate innovative capability is the synthetic estimation criterion of how mature the innovation potential of the company (of the given system) is, which merges partial figures into a single formula for the innovative capability presented in Table 1.

The conducted analyzes show that surveyed companies belong to the SME sector. In the case of more than 40% of the companies, they employ less than 50 employees. Most of them are hotel and catering companies, 17% are sports and recreational companies and 8% transport companies. The analyzed companies operate in the international or regional markets (equally 42% both), 16% are companies operating on a national scale.

The innovation potential determinants are identified based on various sources of information. With the use of the analysis of the influence factors, from a range of environmental variables and the organization's resources, five determinants which have a significant impact on business innovation have been distinguished.

Wording of innovation potential dimensions (criteria)

The issue of the innovative capability development of the company is seen in two distinctive dimensions: innovation potential and the innovative capability, consisting mainly of creating new products (innovation creativity) and applying it in practice (diffusion of innovation). Correlates of various dimensions are the spheres of change and development, i.e. the areas which contain

Table 1. Determinants of the development of the capacity of firms

Determinants	Components	Number of indications	
		number of enterprises	number of enterprises in %
Managerial and employee competences	Knowledge of foreign languages	11	92
	Training time	8	67
	Investments in training	7	58
	Ability to use modern technology	4	33
	Level of education	–	–
Modernity of infrastructure	Methods of communication in a company	7	58
	Utilization of infrastructure	7	58
	System layout	1	8
	Database	–	–
	Type of IT system	–	–
Work organization	Culture of innovation	11	92
	Infrastructure to support the decision making process	5	42
	Rewarding for innovation	4	33
	Forms of work organization	4	33
	Types of employment contracts	1	8
	Group problem solving	–	–
	The existence of R&D department	–	–
Internal links between workstations	–	–	
External cooperation on innovation (knowledge alliances)	Collaboration with other entities	12	100
	The number of cooperants	12	100
	The frames of cooperation	5	42
	Sources of knowledge	3	25
Knowledge protection	Knowledge protection clauses	4	33
	Access to innovation	1	8
	Database dates	1	8
	Legal forms of protection	1	8

Source: own research.

a specific reference to the embodiment innovation. Table 1 shows the determinants of the changes sphere and the potential development of innovative enterprises.⁴

The determinants of the change sphere and the innovation ability development of enterprises are those among the innovation potential determinants, which are efficiently and effectively used to create innovation. In addition, and perhaps most of all, in this area, the characteristic class is innovations whose detailed figures are: types and the number of innovation, e.g. product innovations, process innovations, organizational and marketing innovations, business innovations as well as results achieved in the short and long term perspective, and others.

Measuring the quality level of innovative capabilities

Measuring the innovative capacity quality level requires to be verified. The rating assessment is to indicate to what extent the company is achieving its goals (functions) and meets certain requirements. The verification assessment formula is expressed by the relation of the factual state of the enterprise (S) to the pattern (M) – model state. Defined in such a way, the assessment rate is also a tool that checks the standardization of evaluation criteria by which the aggregate assessment is possible.

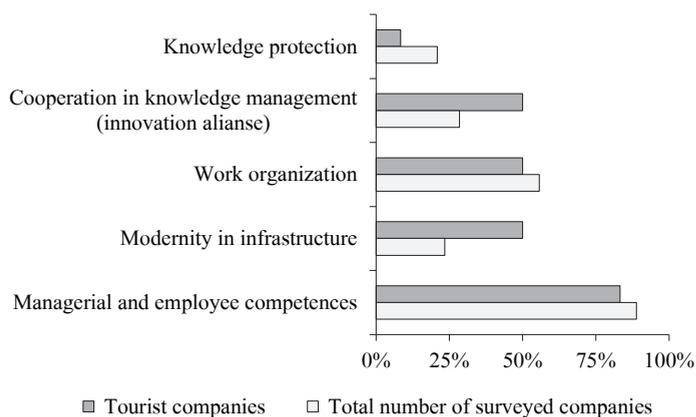


Figure 2. Determinants of enterprises innovation ability in the tourism industry on the background of the determinants of innovation capability of the Little Poland Region entities

Source: own research.

⁴ The presented set of innovation potential determinants has been separated, among many environmental variables and the organization's resources, by means of the factors of influence analysis. Those whose significant cause and effect relationships have occurred and will occur in the future have been indicated. In the process of identifying them a number of different sources of information are used. Those relating to the environment include: statistics, special reports, test results of predecessors and expert opinions. With regard to the resources of an organization, the opinions of managers and specialists from surveyed enterprises are used. The collected comments and statements are the basis for the selection of the determinants of innovation potential of the company.

In the process of evaluation the innovative capability, the normalization of the aggregation point type is used. It is assumed that the standard score for each sub-criterion of assessment (component) is 1 (positive scale) and 0 (negative scale). If the total score of most sub-criterion (components) of the given determinant is positive (i.e. positive scale 1), the qualification of the determinants of enterprise innovation potential is positive.

According to the adopted determinants of innovation potential classification, an analysis of the factors affecting the degree of the innovation (innovation capability) of companies has been conducted.

The study shows that the most important determinants of innovation are managerial competences and labor. In the case of tourism industry, over 80% of respondents claim to have skilled personnel whose competencies can be used in the process of innovation (innovation competence). Half of the tourism enterprises identify the cooperation in knowledge management, workflow and modern infrastructure as important instruments for innovation. Only one company has taken action in the field of protection of knowledge generated in the organization. The comparative analysis shows that the cooperation and IT tools are better used to create innovations in tourist companies than in the total number of recognized entities.

In the next stage of the analysis the components of the innovation potential are recognized which have got a relatively the greatest impact on the innovation capability. They are considered to be the key determinants of this ability (Table 2).

Table 2. Key determinants of the innovative capability development of tourism industry enterprises

Determinants	Components
Managerial and employee competencies	Knowledge of foreign languages Investments in training and the training time The ability of using modern IT technologies
Modernity of infrastructure	Methods of communication within the company The level of using modern IT infrastructure
Workflow	Innovation code Infrastructure to support the decision making process Rewarding for innovation Forms of work organization
External cooperation on innovation (knowledge alliances)	Cooperation with the other entities The number of cooperants Other sources of knowledge
Knowledge protection	Knowledge protection clauses

Source: own research.

The configuration of the given mechanisms and their influence on both the innovation and performance of the company depends on its characteristics and conditions of operation, e.g. industry, company size, scope of business, etc.

Categorization of enterprises

Categorization is a research procedure which aims at establishing a quality level of the company's innovative capability. The categorization of entities has been carried out with regard to their innovation capability level, comparing it to the business innovation. Companies with a low, medium and high level of innovative capability are distinguished. If the company has found that it meets the criteria for only one of the determinants of innovation, then it is assumed to have a low capability for innovation. If a company uses 2 or 3 factors affecting its ability to innovate, it can be concluded that such an enterprise shows the innovativeness at the secondary level. However, if the company has claimed the use of four or more factors among those listed, then we are dealing with a company which belongs to the third category, with a high innovation potential.

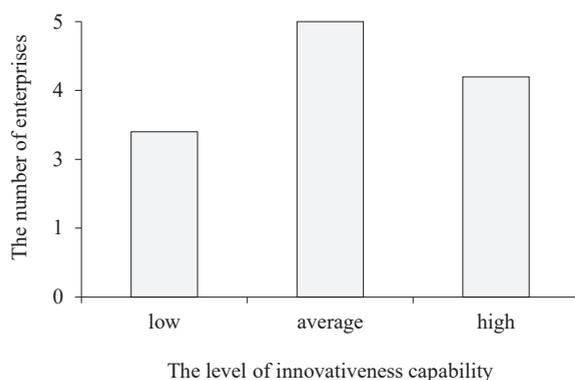


Figure 3. Categorization of enterprises according to the level of innovative capabilities

Source: own research.

In the category of companies with a low level of innovation capability 3 tourist companies are placed businesses, 5 companies are characterized by the average level. The innovative capability on the high level is defined in case of 4 companies. During the assessment of the tourism enterprises from the Little Poland Region innovative capability, it has been established that any company, regardless of the level of innovation, is able to create and innovate.

Verification

Verification involves comparing the qualitative level of the innovative capability of the company (category) with a number of innovations and their generic structure. It tends the thesis that the innovative capacity affects the innovation (innovation) in the form of the number and type of innovation and demonstrate its absence.

The analysis of this data shows that the company has introduced many organizational innovations (innovation 10), followed by marketing (8) and process (8). Also, two innovative

products have been introduced to companies belonging in to the category of the medium and high innovative capability (Table 3).

Table 3. Number of innovations by the level of innovation capability of tourism businesses

Type of innovations conducted	The level of innovativeness capability						Total number of innovation
	low		average		high		
	number of innovation		number of innovation		number of innovation		
	total	1 entity	total	on 1 entity	total	on 1 entity	
Product innovations	0	–	1	0.2	1	0.25	2
Process inovatios	2	0.7	3	0.6	3	0.75	8
Organizational innovations	2	0.7	4	0.8	4	1.00	10
Marketing innovations	1	0.3	3	0.6	4	1.00	8
Total	5	1.7	11	2.2	12	3.00	

Source: own research.

Comparing the number of the implemented innovations in relation to the number of the companies that form a category, it can be concluded that the high efficiency in innovative activities is characterized by high levels of the company’s capacity for innovation (an average of one company accounts for 3 innovations, of which the majority are organizational and marketing innovation). There is also the product innovation. The companies with an average level of the innovation capability introduced a relatively smaller number of innovation than the firms with a high capability for innovation (for 1 person for more than 2 innovation). The tourism businesses categorized as a company with a low level of innovative capabilities have also introduced innovations, however, as not only introduced product innovations. It can be concluded that in the case of tourism enterprises, regardless of their level of innovation ability, development and innovation is possible.

Final remarks and conclusions

The paper presents a concept-oriented analysis to assess the impact of the innovative capability potential of enterprises on their innovation capability and their innovativeness (innovation performance). Moreover, it describes the procedure for measuring the quality level of innovation capability of enterprises and provides the steps to verify that capability. This analysis can be used, among others, to test the development ability of different objects, i.e. business, industry, region, or the economy. As a specific area of business activity analysis it is the field of research procedure, which aims to assess progress in all or selected areas of the company activities, to program changes and the development of this business.

A new concept of enterprise innovation system has been presented whose essential elements are innovative potential and innovative capability of organizations as determinants of invention and innovation diffusion. This approach towards innovation enables, on the one hand, to assess the progress in all or selected areas of innovation companies, and on the other hand it allows to program and plan its dynamics and shape in accordance with the strategy and business model of

the organization, with particular consideration on the identified and verified in practice surveyed companies, the key determinant of the innovation capability development (Table 2).

Based on the presented results, one can provide the following conclusions:

- the employee and managerial competences in the field of innovation, and by working in cooperation with clients in the field of knowledge, innovation-oriented organizational culture and the use of IT tools are the essential determinants of the innovative capability development;
- the surveyed companies only marginally use the modern technologies in the process of their employees development (e.g. e-learning), common databases created with the stakeholders (e.g. with customers), pro-innovative forms of work organization (e.g. teamwork) or they use, only to a small extent, the available sources of knowledge (e.g. cooperation with universities, research institutions);
- tourism businesses of the Little Poland region are mainly SME businesses that do not have the capability to conduct research and development activities, and therefore the main source of innovation in these enterprises is the knowledge acquired from other companies or organizations;
- each company is able to innovate, regardless the level of innovative capabilities, even those companies which were characterized by a low level of innovation have also introduced innovations in the process, organization and marketing.

In the light of my own, empirical research results, also taking into consideration the work of predecessors, it is possible to formulate the thesis that companies compete among each other with both created innovations and their innovative capability. The growth of this capability rises to the rank of a primary survival determinant and a development of the company factor. Innovative capability assessment may be useful in determining the competitive and strategic position of enterprises in a given sector.

The literature on the subject emphasizes the importance of innovation in the sector of manufacture, in contrast to the sector of services. In these research, it is assumed that the appropriate resources stimulate innovations in both sectors in different ways, depending on the situation.

For this purpose, the model of relationship between the circumstances and the level of innovative effectiveness of the organization can be used, i.e. the concept of mediating variables (mediators) and regulatory (moderators).

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KONCEPCJA ANALIZY INNOWACYJNOŚCI PRZEDSIĘBIORSTW TURYSTYCZNYCH

SŁOWA KLUCZOWE

innowacje, potencjał innowacyjny, zdolność innowacyjna, przedsiębiorstwa turystyczne

STRESZCZENIE

Celem artykułu jest prezentacja koncepcji analizy ukierunkowanej na ewaluację zdolności innowacyjnej przedsiębiorstwa. Punktem wyjścia dla jej oceny jest potencjał innowacyjny przedsiębiorstw działających w branży turystycznej, w odniesieniu do systemu innowacyjności przedsiębiorstwa. Istotnym narzędziem badawczym jest analiza relacji między zasobami a zdolnościami, która ukazuje związek przyczynowo-skutkowy między tymi kategoriami. Opisano procedurę pomiaru jakościowego zdolności innowacyjnej przedsiębiorstw oraz podano procedurę weryfikacji tej zdolności. W dalszej części artykułu przedstawiono wyniki badań empirycznych nad innowacyjnością 12 przedsiębiorstw turystycznych. Stwierdzono, że kluczowymi determinantami tej zdolności są kompetencje pracownicze i kierownicze w zakresie innowacji, współpraca z kooperantami i klientami w zakresie wiedzy, proinnowacyjna kultura organizacyjna oraz wykorzystywane narzędzia IT. W świetle podanych rezultatów badań własnych empirycznych, jak również wyników badań poprzedników można sformułować tezę, że przedsiębiorstwa konkurują między sobą wykreowanymi innowacjami, jak również zdolnością innowacyjną. Ocena zdolności innowacyjnej może być przydatna w ustalaniu pozycji konkurencyjnej i strategicznej przedsiębiorstw danego sektora.

THE SUSTAINABLE MANAGEMENT OF TOURISM AS PART OF THE INNOVATIVE REGION MANAGEMENT BASED ON THE EUROPEAN TOURISM INDICATORS SYSTEM FOR SUSTAINABLE DESTINATIONS

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ABSTRACT | The article presents the concept of multifaceted management of tourism in a region by implementing the European Tourism Indicator System for Sustainable Destination developed by the European Commission. This comprehensive approach seems to be an innovative solution to the question of management of tourism which is a priority sector for the regional development, in the strict meaning of the word, for many regions of Europe. The article presents the structure of ETIS and the idea of its implementation – understood as a process – along with the notes from the regions which participated in the pilot phase of the project. The parallel assumption of the article is to disseminate the idea of sustainable tourism management in a region via the implementation of ETIS, which uses an interdisciplinary approach, thus enabling the competitiveness of the region to increase on the present-day, highly saturated, global tourism market.

Putting tourism on a sustainable path is a major challenge, but one that also presents a significant opportunity

Klaus Topfer, UNEP Executive Director

Introduction

Modern tourism is an interdisciplinary phenomenon, which means it integrates many disciplines of economy, as well as of social sciences, environment, and – taken individually – even psychology. Since the 1950s, there has been a continuous quantitative and qualitative development of the phenomenon of tourism. There is also a parallel phenomenon of the globalization of tourism: the emergence of new tourist destinations and tourist emitting regions. The widespread availability

of tourism is a definite advantage of its development, providing self-realization, education, and regeneration of psycho-physical strength to more than a billion tourists worldwide. Still, with this scale of tourism, the scope of its effects exceeds the category of advantages and positives, presenting a significant risk, especially in the case of non-sustainable management. While the global and regional development of tourism cannot be stopped, it should be monitored. Measuring the effect of tourism on a given area makes it possible to attempt to eliminate the risks while increasing the positive aspects of the development of tourism in a region. These goals can be furthered by implementing the tool suggested by the European Committee: the European Tourism Indicators System.

The aim of the article is to present the structure and implementation process of ETIS as an innovative model for managing tourism in a region. A concurrent intention of the article is to promote the concept of sustainable tourism management in a region.

Need for sustainable management in tourism

Tourism in the 21st century – opportunity or threat?

The contemporary tourism is one of the most dynamic sectors of the global economy. Depending on the region's features and attractions and the level of tourism development, tourism may produce from a few – c.a. 4–5% of region GDP to even 40%. An increasing number of destinations have opened up to and invested in tourism turning it into a key driver of socio-economic progress in many regions. It is estimated that 1 in 11 jobs worldwide is directly or indirectly related to tourism services. The number of international tourist arrivals surpassed 1 billion in 2013, rising each year about 5%. Europe, from the beginning of the history of contemporary tourism, has been the main tourist destination in the world. In the 21st century we are facing several changes regarding the tourism development trends: globalization and individualization, culture and sport, local culture and international links. One of the strongest trends in tourism is that Europe is beginning to lose its prominence as a tourist destination. It still accounts for over 52% of international tourist arrivals (UNWTO Tourism Highlights, 2014) but is developing less dynamically than other destinations.¹ The strongest grow occurs in Asia and the Pacific region, with its sub-region as a leader: The South-East Asia (10% grow). What is more, arrivals in emerging destinations are expected to rise twice as much as in developed destinations by 2030. As a result, the tourism market share is predicted to be 57% for emerging economies (UNWTO Tourism Highlights, 2014). These statistics are impressive and give hope and reasons to think of tourism as the great opportunity for regions to create jobs and fight the unemployment especially among the young people. It gives possibilities to increase incomes to the regional budget, revalidate and develop infrastructure and, as a consequence, rise the quality of life of the local societies at the tourist destinations. On the other hand, it appears that the impact of the dynamically but unsustainably developed tourism may turn negative and harmful

¹ UNWTO Tourism Highlights, 2014 Edition, <http://mkt.unwto.org/publication/unwto-tourism-highlights-2014-edition>.

for the destination. The environmental impact is the most commonly recognized. Negative impacts of tourism occur when the level of visitor use is greater than the environment's ability to cope with this use within the acceptable limits of change.² Uncontrolled massive tourism can cause potential and real threats to many natural areas all over the world. It can put enormous pressure on an area and lead to impacts such as soil erosion, increased pollution, discharges into the sea, natural habitat loss for endangered species.

But there are also the other aspects of the problem such as social or cultural issues including ethics or gender equality. The socio-cultural impacts of tourism on host communities are effects of direct and indirect relations with tourists, and of interaction with the tourism industry. The host communities appear to be the weaker party in interactions with their guests and service providers, leveraging any influence they might have. The impacts arise when tourism brings about changes in value systems and behavior thereby threatening indigenous identity. It also happens that changes often occur in community structure, traditional life styles, ceremonies and morality: may lead to the loss both of authenticity and traditional character of local communities. As a consequence, such a community may lose its touristic value. As far as economic aspects are concerned, there are many hidden costs to tourism, which can have unfavorable economic effects on the host community. What is more: in most all-inclusive package tours, about 80% of travelers' expenditures go to the airlines, hotels and other international companies (who often have their headquarters in the travelers' home countries), and not to local businesses or workers. These zones of potential problems should lead to direct association: monitoring tourism development is necessary. It may enable to avoid or at least minimize the risk of dysfunctions of the tourism development in different spheres of tourism influence. The theory which promotes measuring tourism impact in different zones and concentrating on obtaining the balance among them is the sustainable tourism management.

Sustainable development in tourism – an evolution of the approach to sustainability in tourism

The concept of the sustainable development of tourism has not been created in the 21st century. It dates back to the mid-20th century, when some researchers interested in the dynamically developing economy after the destruction of World War II noticed that the changes take place without due regard for environment.³ It was then that the idea of "ecological awakening" began to sprout following a number of ecological disasters.⁴ In the course of several decades to follow, numerous debates on the direction of development led to the theory of sustainable development. It was first taken up in international organizations – UN, UNESCO, later World Tourism Organization (WTO, now UNWTO), then in a more local scope, and has been under discussion until today. The statement from the Brundtlandt Report (World Commission on Environment and Development – WCED),

² www.unep.org/resourceefficiency/Business/SectoralActivities/Tourism/TheTourismandEnvironmentProgramme/FactsandFiguresaboutTourism/ImpactsofTourism/EnvironmentalImpacts/TourismsThreeMainImpactAreas/tabid/78776/Default.aspx.

³ M. Burchardt-Dziubińska, A. Rzeńca, D. Drzazga, *Zrównoważony rozwój, naturalny wybór*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź 2014, p. 11.

⁴ M. Burchardt *et al.*..., p. 12.

“Humanity has the ability to make development sustainable to ensure that it meets the needs of the present without compromising the ability of future generations to meet their own needs,” coined in 1987, remains valid until today. The EU defines the theory of sustainable development as a vision offering a development which incorporates short- and long-term goals, local and global activities, while respecting the social, economic, and natural environment as both independent and inseparable aspects of human existence. There is one key remark here that neither the theory of sustainable development nor lawmaking shall be enough unless the idea finds its place in the awareness of citizens. The change in the global scale will become fact only when average consumers start making their everyday choices in the conviction that the sustainable development is possible.

For the above reasons, sustainable tourism is less a kind of tourism than a way of thinking about it, both on the side of supply and demand. The definition of sustainable tourism also goes several decades back in history. A review of the definitions of sustainable tourism is given by A. Kowalczyk, who quotes Krippendorf’s definition of alternative tourism as the precursor to sustainable tourism (1986), Schwichtenberg’s – also alternative tourism – and then by authors discussing sustainable tourism. In the 1990s, T. Forsyth defined sustainable tourism as one which does not bring negative environmental or social consequences.⁵ Among the numerous Polish authors, D. Zaręba defines sustainable tourism as referring to the concept of eco-development and states that the key notion in the theory of sustainable development is order. Eco-development has to reconcile four types of order: ecological, social, economic, and spatial.⁶ The spatial order is the distinctive component of this definition, being a certain innovation and related to the modern perception of the tourism product. At present, the tourism product is perceived more and more often in terms of destination: the environment in which the core product is embedded. For this reason the sustainable development is becoming the key strategy for managing a tourist destination on a difficult, highly saturated, and competitive tourism market.

Innovations in tourism – management innovations

On the highly saturated modern tourism market, where the role of price competition is marginal, the tourism product, taken both individually (as an individual service, service package, tourist attraction, or type of tourism) and comprehensively as a tourist destination, has to strive to find its own way to the market, then to distinguish itself from competing products, and finally to survive on the difficult market. Depending on the phase of the lifecycle of the product, individual tasks and specific actions are going to differ. Still, however, they should retain innovativeness as their common denominator.

Figure 1 shows the development phases of a tourist product, also related to a tourist destination understood as a product, and the points in time when implementing innovations (of product, organizational and management, marketing, or technological kind) may be a response to downward trends.

⁵ A. Kowalczyk, *Turystyka Zrównoważona*, Wydawnictwo Naukowe PWN, Warszawa 2010.

⁶ D. Zaręba, *Ekoturystyka. Wyzwania i nadzieje*, Wydawnictwo Naukowe PWN, Warszawa 2010.

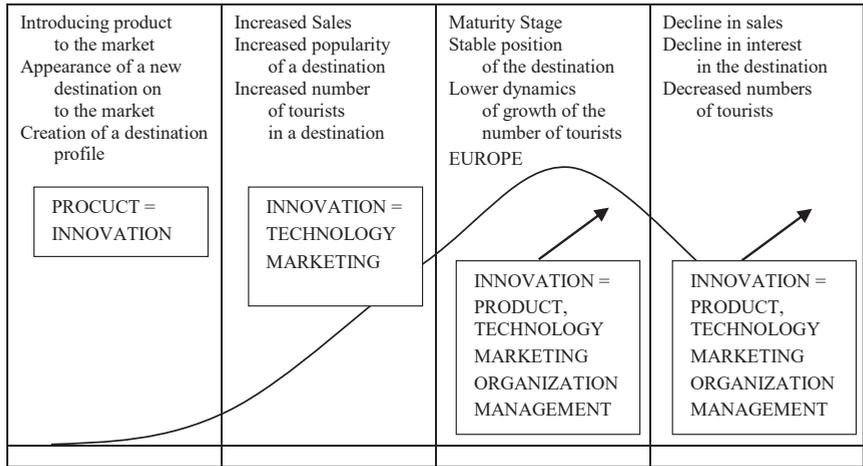


Figure 1. Product life circle and types of innovation

Source: the author's own work.

Due to the service nature of the tourist sector, innovation takes an immaterial form of improvement rather than of useful invention of the technological patent. There are different strategies of implementing innovation as well which may be part of the development strategy of a company or a strategically managed destination, or a reaction to a situation on the market. The following breakdown of innovative actions is conventional and meant only to show various ways of innovative thinking and demonstrate that various actions, often underestimated both at the level of a tourist destination and in the case of individual enterprises, may be conducive of significant changes.

Innovation implementation strategy	Type of innovation	European Tourism Indicators System – sustainable tourism management manamagement system
Ad hoc	– Marketing innovation – Organizational innovation	
Scientific approach to the process of innovation	– Product innovation – Marketing innovation – Technological innovation – Organizational innovation – Innovation in management process	
Innovation seen as a complete knowledge and learning process	– Product innovation – Marketing innovation – Technological innovation – Organizational innovation – Innovation in management process	

Figure 2. Implementation strategies and types of innovation in tourism

Source: the author's own work.

The present-day notion of a tourist product differs from its traditional understanding as a package of services or an individual service. While this approach is still valid, of course, from

the viewpoint of the global and highly saturated tourist market, it seems more significant on the strategic planning level to define a tourist product as a comprehensive perception of a given place (tourist destination), previously identified with the so-called extended product. In other words, modern tourist product may be understood as the “attractions and environmental features, facilities and services, communication availability, the image of the visited area, and the price which, related to quality, is also part of the image.”⁷ According to the strategic management, conceived as a certain philosophy of leading an organization (or region) which gives grounds to draft directions for development and, in a longer perspective, provides the conditions for the realization of intended goals⁸, the management of development of tourism in a region should encompass many areas of functioning of tourism economy as well as, strictly speaking, the areas of the functioning of the region which are affected by tourism. Strategic documents related to the development of tourism in a region reflect this now predominant trend in world tourism. In the document “Directions for Tourism Development until 2015” by the Ministry of Sport and Tourism, the integration of tourist products and offer within regions is the operational goal relative to the shaping of competitiveness of regions. It mentions the “shaping of the tourist space” as a priority area.⁹ Another document by the Ministry of Sport and Tourism, the “Program for Tourism Development until 2020”, following a SWOT analysis of tourism in Poland, present the following perspective of its development:

“A modern and open tourism economy, based on intelligent specialization of tourism in the regions of Poland, knowledge-based, being one of the key factors of regional development, and strengthening the competitiveness of the country in the EU.”¹⁰ In order to achieve this goal, or realize such an ambitious vision, it is necessary to comprehensively analyze the potential of the region, to diagnose it, and formulate a potential-based destination profile. It is also necessary to recognize the character of interactions between the phenomenon of tourism and the economy and environment (natural, social, and cultural) of the region. The monitoring of many of the issues mentioned above and diagnosing the key points of the development and the influence of tourism on a region is made possible by the tool for sustainable management of tourism in a region developed by the European Committee: the European Tourism Indicators System (ETIS).

European Tourism Indicators System (ETIS) for sustainable destinations as a tourism managing tool in regions

European Tourism Indicator System Toolkit was commissioned by the European Commission based on the vast research and observation on contemporary tourism trends, the challenges that tourism market and the need of enforcing the competitive position of Europe as tourist destination

⁷ E. Dziedzic, *Zaangażowanie finansowe sektora publicznego w rozwój podaży turystycznej w miastach*, in: *Turystyka na obszarach miejskich – uwarunkowania rozwoju, narzędzia promocji*, Zeszyty Naukowe Uniwersytetu Ekonomicznego w Katowicach, Katowice 2012.

⁸ M. Dołhasz, J. Fudaliński, M. Kosala, H. Smutek, *Podstawy Zarządzania, Koncepcje – strategie – zastosowania* Wydawnictwo Naukowe PWN, Warszawa 2009.

⁹ *Kierunki rozwoju turystyki do 2015 roku*, Ministerstwo Sportu i Turystyki, Warszawa 2008.

¹⁰ *Program Rozwoju Turystyki do roku 2020*, Ministerstwo Turystyki i Sportu, Warszawa, June 2014.

on the global scale. The European Tourism Indicator System is designed to show that the sustainable tourism development in a region is a process and to give to the destinations some suggestions and accurate indicators that may be useful while introducing sustainable management. It should raise awareness of the need of sustainability in tourism and its real meaning. Sustainable management is not only “not to harm” the environment. It is planning, introducing, monitoring and measuring results in a different fields of interests. Technically, it consist of 27 core and 40 optional indicators. It can be integrated to the existing destination monitoring system or introduced as a basic tool. The great advantage of this system is the integration of public and private space, fields of interest (e.g., environmental impact, socio-cultural, economical value). As we already know, the future competitiveness of tourism system is closely linked to its sustainability, so the European Commission points out some key motivations for monitoring destination, amongst which one can find: improved information leading to better decision making, managing and minimizing risk, prioritization of projects, and benchmarking performance.

Core and optional indicators

The indicators were developed over a two-year period. Core Indicators are identified as being the most important and Optional Indicators are more relevant for the destinations that have more advanced monitoring systems in place. The ETIS project has been tested in two phases of the pilot studies in more than 100 European regions. After each phase the experiences have been shared and the comments taken into account for the future improvement of ETIS. Generally, the system of the indicators has been agreed to be relevant, clear and useful. The structure of indicators in presented in Table 1.

Table 1. Selected Core and Optional Indicators of ETIS

Section	Criteria	Indicator	Core or optional
1	2	3	4
Destination Management	Sustainable Tourism Public Policy	Percentage of the destination with a sustainable tourism strategy/action plan, with agreed monitoring, development control and evaluation arrangement	Core
		Number of residents satisfied with their involvement and their influence in the planning and development of tourism	Optional
	Customer Satisfaction	Proportion of visitors that are satisfied with their overall experience in the destination	Core
		Rate of repeat/return visitors (within 5 years)	Optional
	Information and Communication	The range of visitors who note that they are aware of destination sustainability efforts Percentage	Core
		The percentage of businesses that communicate their sustainability efforts to visitors in their products, marketing, or branding	Optional

	1	2	3	4	
Economic Value	Tourism Flow		Number of tourist nights per month	Core	
			Relative contribution of tourism to the destination's economy (% GDP)	Optional	
			Daily spending per tourist (accommodation, food and drinks, other services)	Core	
	Tourism Enterprise(s) Performance		Average length of stay of tourists (nights)	Core	
			% of ten largest tourism enterprises involved in destination management/cooperative marketing	Optional	
	Quantity and Quality of Employee		Direct tourism employment as a rate of total employment	Core	
			Percentage of jobs in tourism that are seasonal	Optional	
	Tourism Supply Chain		Quota of tourism enterprises actively taking steps to source local, sustainable, and fair trade goods and services	Core	
			Percentage of the destination covered by a policy promoting local, sustainable and/or fair trade products and services	Optional	
	Social and Cultural Impact	Community/Social Impact		Proportion of tourists/visitors per 100 residents	Core
			Number of residents who are satisfied with tourism in the destination (per month/season)	Optional	
Gender Equality			Rate of men and women employed in the tourism sector	Core	
			Number of tourism enterprises where the general manager position is held by a woman	Optional	
C.3 Equality/Accessibility			Range of commercial accommodation with rooms accessible to people with disabilities and/or participating in recognised accessibility schemes	Core	
			Area of destination served by public transport that is accessible to people with disabilities and people with specific access requirements	Optional	
			Percentage of visitor attractions that are accessible to people with disabilities and/or participating in recognised accessibility schemes	Core	
Environmental Impact		Reducing Transport Impact		Number of tourists and same day visitors using different modes of transport to arrive at the destination (public/private and type)	Core
		Solid Waste Management		Waste volume produced by destination (tonnes per resident per year or per month)	Core
				Percentage of tourism enterprises separating different types of waste	Optional
	Water Management		Fresh water consumption per tourist night compared to general population water consumption per person night	Core	
			Number of tourism enterprises with low-flow shower heads and taps and/or dual flush toilets/waterless urinals	Optional	
	Energy Usage		Energy consumption per tourist night compared to general population energy consumption per person night	Core	
	Landscape and Biodiversity Management		Area of destination (in km ²) that is designated for protection	Core	
	Light and Noise Management		The destination has policies in place that require tourism enterprises to minimise light and noise pollution	Core	
Bathing Water Quality		Level of contamination per 100 ml (faecal coliforms, campylobacter)	Core		

Source: *European Tourism Indicators System for Sustainable Destinations*, European Commission, European Commission 2013, Brussels.

Introducing ETIS as a process

The introduction of the ETIS (for sustainable development of tourism in a region) is a process which requires timing and is strongly based on the cooperation of entities making up the

“consortium”: the organization created to achieve a specific goal. The implementation stages of the process are defined as follows:

Stage I: Building awareness

In the context of project realization, building the awareness of implementing the system aimed at the management of sustainable development of the destination means informing and raising awareness of the greatest possible number of people, enterprises, and organizations regarding the planned actions, their scope, and significance. Building awareness also seems to be an activity preceding decisions on implementing the ETIS system. From the point of view of local authorities as well as all participants of the tourism market in a given region, there already has to be an awareness of the advantages of introducing sustainable management of tourism in order to argue for the efforts which have to be made if the project is to succeed. Thus, what is important is not only the general knowledge about the introduced project but also belief in the essence of sustainable development of tourism.

Stage II: Creating the profile of the destination

Every region which intends to invest, economically and organizationally, in the development of tourism, needs to have an awareness of the assets, competitive advantages, and opportunities for tourism development it has. However, each of these areas is different, and it is based on this “difference” that it should build its image as a tourist destination. Dependent on the developed product strategy and destination profile, individual parameters of the system can be more or less significant, revealing the strengths and weaknesses of the region. A significant question in a slightly different dimension is setting clear limits of the destination, which will in turn influence the choice of people, organizations, and enterprises involved in the project.

Stage III: Forming the executive team

The next and particularly important stage is to create an executive team by diagnosing people, enterprises, and organizations belonging to various categories of tourist traffic participants. Including representatives of the private and public sector, and the sectors of enterprises and organizations in the team will enable to gather comprehensive data. A model composition of an executive team will be presented below, in the section devoted to the possibilities of implementation of a system for the sustainable development of tourism.

Stage IV: Establishing roles and responsibilities within the team

It is necessary to establish clear roles within the team. As the sustainable management system requires gathering and monitoring of data from various fields, the clear definition of their scope is of crucial importance to the thoroughness of the project and reliability of the results and conclusions we want to draw for the destination.

Stage V: Gathering and creating inventory of data

This stage involves the collection and recording of the data which should exist in one place but form a distributed system. The gaps in the collected data, especially those considered as crucially important for the destination, will require intensified operational activities. In addition,

the destination receives feedback regarding monitoring, or rather the lack of certain fields in the operation of the destination.

Stage VI: Data analysis

The data collected based on indicators needs to be analyzed to find both the strengths and gaps in the sustainable development. The conclusions of the analysis should lead to setting goals, necessary and possible to realize, and to plans of actions to take in order to achieve them. Each destination can have different priorities. In one case, the key factor may be the use of water by tourist in the region where there is a shortage of it, which will require implementing appropriate solutions. In another, the analysis may reveal exceeding the norms of noise or atmospheric pollution, inequality in employment, disturbed comfort of life of inhabitants by a too great accumulation of tourist arrivals in a short time, or a detrimental structure of tourist spendings in the region. Each of these shall require taking different actions.

Stage VII: Ensuring the continuation of the project

Making an effort to introduce the sustainable management system should not be a one-time action. It would be appropriate to treat it as a long-term project and build a strategy upon its basis with a longer time scope.

Analysis of the process of introducing ETIS and ways to streamline it

SWOT analysis of introducing ETIS and its structure based on European experience

The first pilot phase of introducing the EU project which took place between 15 July 2013 and 15 April 2014 involved 104 regions, 50 of which presented their results to the European Committee. Among these participants, 35% were urban destinations, 23% were communes, 28% were non-administrative regions, and 7% were provinces. There was much activity of the Southern European destinations, in particular from Italy and Greece. It is worth to adduce some of the data reported by the European Committee (collected from 50 regions) as well as individual participants. It was shown that:

1. More than 50% of destinations report significant overpopulation during the tourist season, regardless of the destination type (seaside, urban, or rural).
2. 26% of destinations did not have a system to monitor sustainable development before.
3. Among destinations which had a system to monitor tourism, the majority declared to have at least 3 distributed systems.

Some changes to the structure of indicators were suggested, as well as a new group of indicators: innovation and entrepreneurship. It was also proposed to increase support by the European Commission, especial at the stage of raising the awareness of the need for sustainable management in tourism. The majority of destinations decided to continue to participate in the project and found it very useful, evaluating ETIS as an effective system of managing a tourism

destination. Unfortunately, no region of Poland took part in either the 1st or the 2nd pilot phase of the project. The table below presets the SWOT analysis of introducing ETIS in a region based on the experience of the regions participating in the pilot phase of the study and on the analysis of the document.

Table 2. SWOT analysis of introducing ETIS in a region

Strengths	Weaknesses
Characteristics and structure of ETIS: – System of indicators and the system structure which reflects all spheres of influence of tourism – Instructions on the stages of introducing ETIS Introduction of ETIS: – Cooperation between various entities at the local level – Strengthening of the awareness of sustainable development among project participants, inhabitants, and tourists – Long-term economic benefits due to correction of expenditures related to the development of tourism (e.g. energy) and increasing the number of tourism by improving the region brand.	Characteristics and structure of ETIS: – Difficulties in forming the executive group: on one hand, the excessive number of members; on the other, there were areas which yielded no data due to the lack of organizations representing a given sphere. – Technical issues in creating the inventory of data (no idea for a system) – Obtaining data from participants – Impossibility to define certain indicators Introduction of ETIS: – Lack of human and monetary resources
Opportunities	Threats
– Building the positive image of the destination – Increasing the competitiveness of a region by, among other things, caring for spatial order and tourist and recreation space – Improving the quality of life of inhabitants by developing infrastructure and quality of public space – Decreasing environmental cost of tourism development – Increasing the number of tourists in the region	– Insufficient awareness of the theory of sustainable development of tourism in a region, no interest in introducing ETIS – Not ensuring the continuation of the project by insufficient use of obtained results – Lack of long-term strategies for sustainable development of tourism based on obtained results – Insufficient awareness of the importance of the theory of sustainable development among potential participant of the project on the side of tourism supply – Lack of funds

Source: the author’s own work.

Critical points diagnosis in the processes of introducing ETIS – improvement proposals

A vast majority of the European regions participating in the pilot phases of introducing the ETIS have declared it to be appropriate and effective, and assessed the structure of its indicators as very good. However, some problems have been signaled as well, having occurred at various stages of introducing the process. The table below presents the selected difficulties in introducing the system and the possibilities of resolving them.

Table 3. Problems reported by European regions in the process of introducing ETIS

Stage of the process	Problem encountered	Possible solutions
Building awareness	The reporting destinations declared difficulties in carrying out wide-ranging informational actions due to, e.g., little interest of the media, low availability of communication tools, and insufficient involvement of local authorities.	<p>Creation of a www platform – before launching the project – tied to the web page of the destination: informative at first, promoting sustainable development, and providing objective knowledge about both the project and sustainable development.</p> <p>Attempts to increase interest of the media by showing the advantages of introducing the project.</p> <p>A “project study” for media representatives.</p> <p>Recognizing units of local government as members of the consortium.</p>
Formation of the consortium	Formation of the consortium was not a major difficulty, yet sometimes they became too comprehensive, leading to difficulties in managing their work. In many cases, the lack of activity of individual participants made the realization of the project difficult.	<p>The formation of a consortium should be preceded by the analysis of areas to be covered with competencies (project interdisciplinarity) while minimizing the size of the executive group.</p> <p>Setting a timeframe for works and the ways to enforce obligations – motivation.</p>
Distribution of roles and responsibilities within the consortium	Difficulties revealed at this stage: <ul style="list-style-type: none"> – setting timeframes for carrying out individual tasks, – problems determining the way to gather information, – lack or limited availability of information sources, – some areas were not reflected in the consortium – lack of someone responsible for or able to gather data in some categories of information, 	<p>Fixing a detailed schedule for works and monitoring the advancement of realization.</p> <p>A thorough analysis of indicators before beginning the realization of the project and distributing roles: in order to decide which data is secondary and which is primary, and how it is going to be obtained.</p> <p>In the case when it is impossible to gather data based on the indicators suggested by ETIS: replacing it with other, attainable indicators appropriate for a given issue.</p>
Collection of data	As many as 83% of destinations declared issues with collecting data based on indicators: the main issue was motivating the members of the consortium to fulfill their responsibilities and influencing individual project members.	<p>Appropriate distribution of tasks and competencies in such a way that gathering data becomes part of every-day actions of a given consortium member.</p> <p>Publishing of current stages of project realization on a www platform: information about partners who do not fulfil their obligations.</p>
Data analysis	<p>The analysis of data did not lead to developing appropriate strategies for the future (e.g. based on revealed irregularities, barriers, or weaknesses), therefore unsatisfactory results were declared.</p> <p>The difficulty in sharing the obtained knowledge and experiences with other regions was also indicated.</p>	<p>Sustainable development of tourism should be treated as a strategic goal, not as an experiment: introduction of ETIS allows to diagnose problems and barriers to development in various areas. The information that they occurred is not of high (practical) value in itself for the development of tourism in a region: what is valuable is incorporating the conclusions in developmental strategies and recovery plans.</p> <p>Creation of a platform for the exchange of experiences between regions participating in the project: actions by the European Committee.</p>
Ensuring the continuation of the project	Lack of resources to continue the project.	<p>Strategic planning in financial category: in a longer term than the planned introduction of the system in the 1st phase.</p> <p>The project is very good for grants: its interdisciplinarity and the cooperation of the private, local government, and scientific sectors brings opportunities to apply for resources.</p>

Source: the author's own work.

Conclusion

The ETIS is a relatively new initiative, and its introduction in the European regions over 2 pilot phases is aimed at its further improvement. It is a flexible system, able to function in connection with the monitoring systems already present in the destination or as an integrating tool. In spite of reported difficulties, the majority of destinations declares appropriateness of introducing the system and willingness to continued realization of the project. The most important advantages of introducing ETIS seem to be the following aspects:

- the tourism economy in the region is strongly related with other areas of the economy: its sustainable development may contribute to the development in other fields,
- sustainable management of tourism is a component of a sustainable development system as such,
- sustained development of tourism incorporates social, environmental, and economic aspects, the monitoring of which, diagnosing problems, and eventually solving them benefits the comprehensive management of a region,
- the worldwide socio-economic trend promotes sustainable development in various fields (tourism: World Tourism Organisation, European Committee).

Sustainable development may contribute to creating the region brand according to the trends in modern management of a region.

Present-day tourists look for an original product matching their interests, one which meets specific quality standards, both as individual services and the perception of the destination as a whole. The creation of the destination brand and comprehensive improvement of the destination quality can be greatly helped by introducing the system of sustained management of tourism based on the European Tourism Indicator System Toolkit.

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ZRÓWNOWAŻONE ZARZĄDZANIE TURYSTYKĄ JAKO ELEMENT INNOWACYJNEGO ZARZĄDZANIA REGIONEM NA PODSTAWIE EUROPEAN TOURISM INDICATORS SYSTEM FOR SUSTAINABLE DESTINATIONS

SŁOWA KLUCZOWE

zrównoważony rozwój turystyki, innowacje w zarządzaniu turystyką

STRESZCZENIE

Artykuł prezentuje koncepcję wielopłaszczyznowego zarządzania turystyką w regionie poprzez wprowadzenie European Tourism Indicator System for Sustainable Destination stworzonego przez Komisję Europejską. To wszechstronne podejście wydaje się być innowacyjnym rozwiązaniem kwestii zarządzania turystyką w regionie, które stanowić może jeden z kluczowych elementów zarządzania rozwojem regionalnym sensu stricto dla wielu regionów europejskich. W artykule zaprezentowano strukturę ETIS (European Tourism Indicator System for Sustainable Destination) oraz zasady procesu wdrażania niniejszego systemu z uwzględnieniem uwag regionów uczestniczących w pilotażowej fazie wdrażania projektu koordynowanego przez Komisję Europejską. Równoległym i równoważnym celem artykułu jest rozpowszechnianie idei zrównoważonego zarządzania turystyką w regionie poprzez wdrażanie systemu ETIS, który prezentuje interdyscyplinarne podejście, mogące prowadzić do zwiększenia konkurencyjności regionów na współczesnym, globalnym rynku turystycznym.

THE CREATION OF THE MODEL THRESHOLD TOURIST AREA LIFE CYCLE OF THE FUNCTIONAL URBAN AREA OF KOŁOBRZEG

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KEYWORDS | Kołobrzeg, functional urban area, threshold theory, tourist area life cycle, threshold tourist area life cycle

ABSTRACT | This research will attempt to modify the Tourist Area Life Cycle (TALC) previously developed by R.W. Butler. The author of the modified TALC introduces the premises of the Threshold Theory by B. Malisz, based on the research of Kozłowski. The effect is creating a model of the Threshold Tourist Area Life Cycle (TTALC). The theoretical model and its course were then tested on the basis of the Functional Urban Area of Kołobrzeg known as FUA. This is one of the most developed types of Polish tourist regions. To confirm its development, threshold crossings identified the thresholds supported by the development of technical infrastructure, accommodation facilities, the number and size of the usable area of the housing, as well as “second houses” and “second apartments” (houses/apartments in addition to permanent dwellings). The purpose of the study is to test TTALC based on the selected tourist destinations included in the FUA, including the health resorts of Kołobrzeg.

Introduction

In accordance with the provisions of the document “National Spatial Development Concept 2030”, Kołobrzeg is an important urban center on which the FUA can be created. In February 2014, the document “Strategy for the Development of the Functional Coastal Area” was accepted, and at the turn of the year of 2014/2015 other concepts were developed which included: the natural

valuation of FUA, a uniform identification system for FUA, and the FUA transport policy.¹ The high level of integration and the functional connection justifies establishing the FUA as the leading feature in the spa and leisure tourism. Complex developmental processes occurring in the area due to the very strong development of accommodation facilities, communication infrastructure, and associated services, point to the need to address the problems of the entire TALC FUA. The aim of this article is to analyze the modified course of TALC, provide an introduction to the principles of the Threshold Theory by B. Malisz, reconstruct TALC into TTALC, and provide evidence of the TTALC application run on selected examples of tourist sites of the FUA. TTALC may be another modification or reconstruction of TALC while maintaining its basic underlying assumptions.

Location and the spatial structure of the FUA of Kołobrzeg

Kołobrzeg's FUA (Functional Urban Area) consists of the municipality of Kołobrzeg, the surrounding rural communities, and Ustronie Morskie. It occupies an area of 226.68 km² and in 2012 it was inhabited by a total of 60,750 inhabitants with an average population density of 268 persons/km². According to the Central Statistical Office, in 2013, on this area, there were over 32,000 beds and, according to the author's own research work, there were nearly 100,000 beds. The FUA covers the northern part of the district of Kołobrzeg and is a linear spatial arrangement which extends along the coastline of the Baltic Sea, with a length of over 25 kilometers. The development of the settlement and its tourism have led to an almost continuous linear settlement system with a length of over 25 km of the target based on dual carriageways S-6 and S-11 and the Light Rail Seaside (LKN) along the coastline² (Figure 1).

The FUA includes several important tourist destinations: Kołobrzeg (pop. 47,000; approx. 48,000 beds), Ustronie Morskie (pop. 2,200; approx. 16,300 beds), Grzybowo (pop. 1,650; approx. 9,900 beds), Dźwirzyno (pop. 710; approx. 17,500 beds), Sianożęty (pop. 450; approx. 6,300 beds), Wieniotowo (pop. 250; approx. 800 beds). Other FUA places with a very small number of beds are Zieleniewo (pop. 2,450), Budzistowo (pop. 824), Niekanin (pop. 405), Korzystno (pop. 390), Stramnica (pop. 271), and KądzIELno (pop. 267). The seaside population in 2013 reached approximately 52,260, while the entire population of the FUA was over 56,867. The total number of beds reached almost 100,000.

¹ Transport Policy, City of Kołobrzeg, 2015.

² M. Miedziński, *Miasto Kołobrzeg wiodącym uzdrowiskiem Polski i jednym z centrów turystycznych kraju*, in: *Ekonomiczne i organizacyjne aspekty funkcjonowania polskich uzdrowisk*, ed. E. Rydz, Wydawnictwo Akademii Pomorskiej, Słupsk 2012, pp. 139–150.

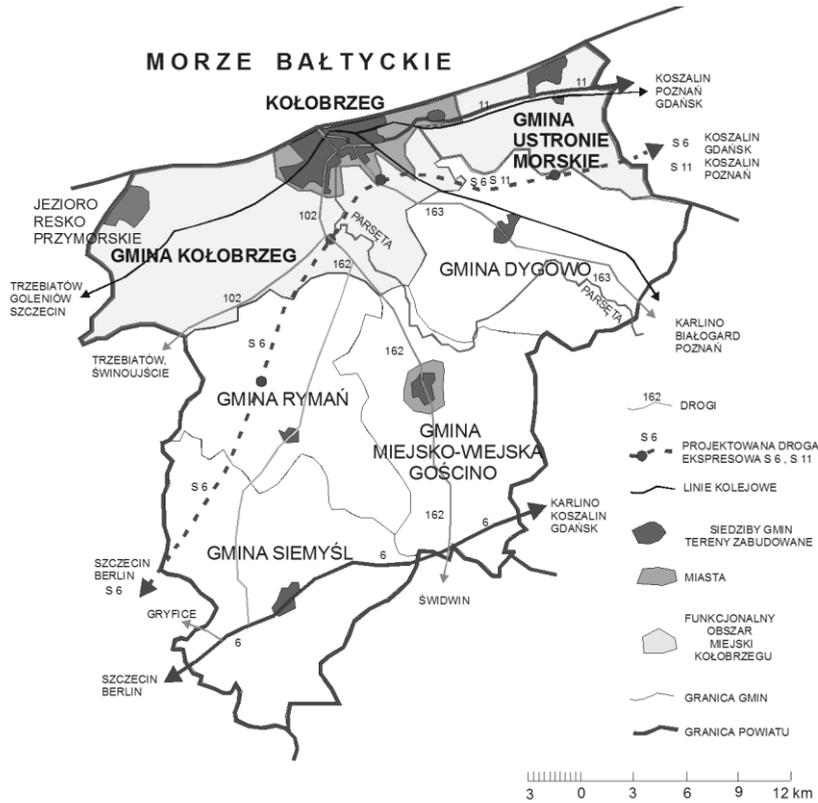


Figure 1. Location and the spatial structure of the tourist region FUA Kołobrzeg

Source: my own research and development.

TALC in the light of the Threshold Theory

A breakthrough study in tourism is the TALC theory. This theory was published by R.W. Butler in 1980 in the journal “The Canadian Geographer.”³ The theory introduces to tourism distinct phases similar to the product life cycle in economic research:

- the exploration phase (discovery),
- implementation phase (introduction),
- growth phase of consolidation (maturity),
- stagnation phase (saturation), and the
- rebirth/fall phase (fall/rebirth).

³ R.W. Butler, *The Concept of a Tourist Area Cycle of Evolution: Implications for Management of Resources*, “The Canadian Geographer” 1980, Vol. 24, pp. 5–12.

The modifications made by other authors have allowed for the addition of a stabilization phase (change⁴ or restore its functions) and regeneration, as well as, reorientation and stagnation phases.⁵ The concept of TALC by R.W. Butler has been analyzed and modified repeatedly. Substantial modification of the life cycle of the tourist area in the area of terminology has been introduced by R. Szromek who substitutes the term of the phase of stagnation for the phase of the blooming period.⁶ The analysis of the classic life cycle of a tourist area in the consolidation and prosperity phase also includes a zone of maximum absorbency and tourist capacity, which ultimately may result in a falling or rebirth, also called the post-blooming period.⁷ The authors of numerous studies indicate the possibility of recovery (revival) implemented by deliberate and comprehensive actions to improve the attractiveness of the tourist area, allowing for the start of a new TALC⁸, which would confirm the P. Defert's thesis.⁹ The revitalization and restoration of beaches and the attractions offered by the Kołobrzeg resort area carried out in recent years and the significant improvement in the quality of accommodation and accompanying services confirms the maintainence of the existing TALC or the possibility of creating the new TALC cycle. According to the supplemental material in 2000 by R.W. Butler, the TALC concept and its extension in 2006, the TALC course is a dynamic, long-term phenomenon that could have universal application. Generally, the analysis of the TALC course is possible to interpret only after many years, and forecasting the future course of development of this tourist area is difficult. Over the past several years, numerous studies have tested this concept,¹⁰ confirmed its authenticity,¹¹ pinpointed its imperfections,¹² or supplemented TALC with new elements.¹³

⁴ C.S. Johnston, *Shoring the Foundations of the Destination Life Cycle Model*, Part 1, "Ontological and Epistemological Considerations Tourism Geographies" 2000, No. 3 (1), pp. 2–28

⁵ S. Agarwal, *Coastal Resort Restructuring and the TALC Model*, in: *The Tourist Area Life Cycle. Conceptual and Theoretical Issues*, ed. R.W. Butler, Channel View Publications, Clevedon 2006, pp. 201–218.

⁶ A.R. Szromek, *Cykliczność rozwoju uzdrowisk na przykładzie uzdrowisk polskich*, in: *Uzdrowiska i ich znaczenie w gospodarce turystycznej*, ed. A.R. Szromek, Proksenia, Kraków 2010, pp. 17–40, 280.

⁷ S. Agarwal, *Restructuring Seaside Tourism. The Resort Lifecycle*, "Annals of Tourism Research" 2002, No. 29 (1), pp. 25–55.

⁸ M. Oppermann, *What is New With the Resort Cycle? Comment*, "Tourism Management" 1998, Vol. 19, pp. 181–183.

⁹ P. Defert, *Essaie de localization touristique*, "Tourist Review" 1954, Vol. 9 (1), p. 119.

¹⁰ Lundtrop S., S. Wanhill, *The Resort Lifecycle Theory. Generating Processes and Estimation*, "Annals of Tourism Research" 2001, No. 28 (4), pp. 947–964; Z. Kruczek, A.R. Szromek, *Wykorzystanie modelu R. W. Butlera w interpretacji rozwoju atrakcji turystycznej na przykładzie kopalni soli w Wieliczce*, "Folia Turistica" 2011, No. 25 (2), pp. 275–289.

¹¹ R.M. Lagiewski., *The Application of the TALC Model: A Literature Survey*, in: *The Tourism Area Life Cycle*, ed. R.W. Butler, Channel View Publications, Clevedon–Buffalo–Toronto 2006, p. 27.

¹² K.M. Haywood, *Can the Tourist Area Life-Cycle Be Made Operational?*, "Tourism Management" 1986, No. 7 (3), pp. 154–167; K.M. Haywood, *Evolution of Tourism Areas and the Tourism Industry*, in: *The tourism area life cycle*, ed. R.W. Butler, Vol. 1, "Applications and modifications", Channel View Publications, Clevedon–Buffalo–Toronto 2006, pp. 51–70.

¹³ S. Corak, *The Modification of the Tourism Area Life Cycle Model for Re(In)venting a Destination: the Case of the Opatija Riviera, Croatia*, in: *The Tourism Area Life Cycle*, ed. R.W. Butler, Vol. 1, "Applications and modifications", Channel View Publications, Clevedon–Buffalo–Toronto 2006, pp. 271–288; S. Lundtorp, S. Wanhill, *Time Path Analysis and TALC Stage Demarcation*, in: *The Tourism Area Life Cycle*, ed. R.W. Butler, Vol. 2, "Conceptual and theoretical issues", Channel View Publications, Clevedon–Buffalo–Toronto 2006, pp. 138–149.

An analysis of the modified TALC of a typical tourist town (Figure 2) equally compares to the TALC of Kołobrzeg and demonstrates the significant similarities in their courses¹⁴ (Figure 3).

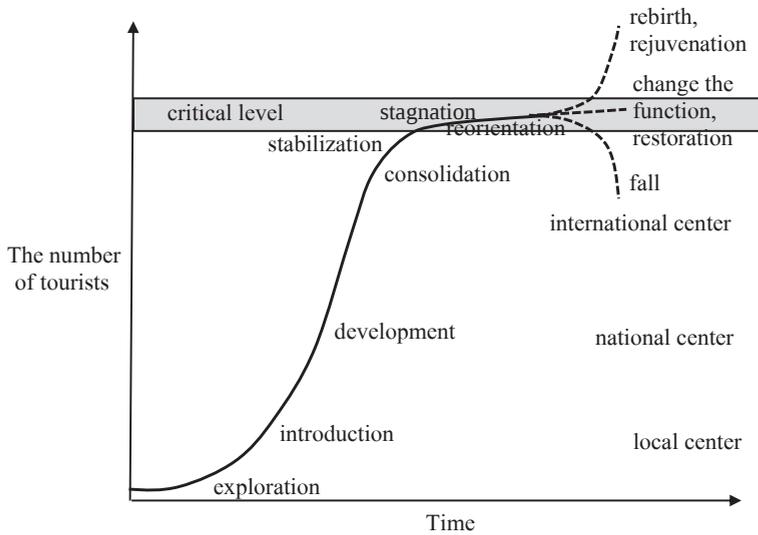


Figure 2. Classical modified tourist area life cycle. R. W. Butler and subsequent changes made by other authors

Source: R.W. Butler, *Tourist Area Life Cycle*, in: (CTR) *Contemporary Tourist Reviews*, OX3 9TJ, Oxford 2011, p. 33.

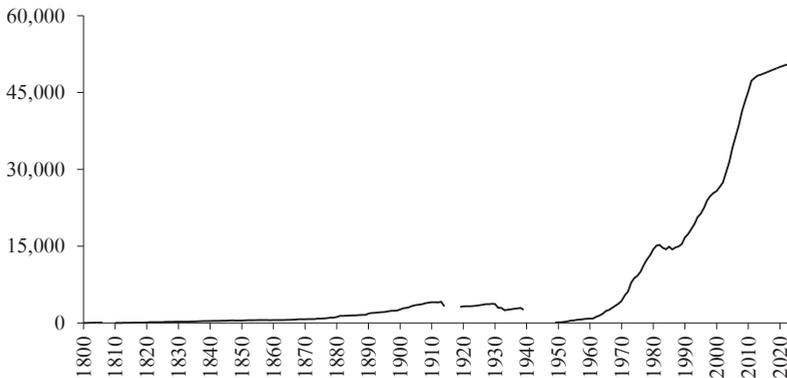


Figure 3. Changes in the number of beds in Kołobrzeg the years 1800–2025

Source: my own research and development.

¹⁴ M. Miedziński, *Rozwój przestrzenny uzdrowiska Kołobrzeg od 1830 do 2009 roku oraz przemiany jego bazy noclegowej w latach 1989–2009*, in: *W trosce o przyszłość kołobrzeskigo uzdrowiska – międzynarodowe forum uzdrowiskowe*, ed. E. Wiśniewski, Regionalne Stowarzyszenie Turystyczno-Uzdrowiskowe, Kołobrzeg, Wydawnictwo INTRO-DRUK, Koszalin 2009, pp. 124–137.

In the course of the Kołobrzeg cycle, there have been significant gaps between the phases of intensive growth (boom) and retardation or even regression (slump). These periods are irregular fluctuations, however, and can be studied, as well as the occurrence of developmental thresholds, in important historical references.

Threshold development problems in tourist areas refer to the Threshold Theory by B. Malisz and allow the same as in the case of urban development with designated levels of development in the tourist area and in the broader understanding of the tourist space. In many cases, especially in small or young tourist areas, we are dealing with a long life cycle of the area (tourist town). In a significant number of cases where the life cycle is quite long, expansion of the tourist area happens in stages, and these stages are characterized by the development of accelerations (D pulses) during, for example, an economic boom, stagnation of development, or a severe economic downturn.

Studying the long course of the TALC of Kołobrzeg enables you to highlight not only two, or even three, cycles of life but also allows the use of the Threshold Theory for modification and analysis of the course of TALC.

In the case of Kołobrzeg, the Threshold Theory indicates that this tourist area has probably already begun the process of further extending the life cycle of the next stage of growth even though the city over a period of several years from 2007–2012 had a slowdown in the development of hotel accommodation. Kołobrzeg which was in the developmental phase, slowed down the pace of development of the accommodation facilities with a significant, constant increase in overnight stays making efficient use of services.

Outline of the Threshold Theory by B. Malisz

In line with B. Malisz's Threshold Theory,¹⁵ city and urban areas face important limitations in their development in population and spatial development. Among these limitations are:

- physical constraints (resulting from the diversity of physio-graphic features of the site),
- functional limitations (due to the form of land use),
- technological limitations (due to the characteristics of the technical infrastructure),
- structural constraints (due to the need to restructure the land).

Each limit may be exceeded in order to further the development of the city; however, this process is associated with the crossing of significant financial outlays as well as with an increase in operating costs of the city/urban areas (for example, the cost of infrastructure development in Kołobrzeg including the expansion of the beaches, reconstruction of the transportation system, and the modernization service infrastructure of the city.)

The capital and fixed costs in the course of the operation and development of the city are those thresholds, and the cost of exceeding a given threshold is not continuous but is achieved in stages (increments) and the jumps are in turn determined by the threshold key constraints.

¹⁵ B. Malisz, *Metoda analizy progowej w zastosowaniu do planowania miast i regionów*, in: *Metoda analizy progowej*, eds. B. Malisz, J. Żurkowski, Studia KPZK PAN, No. 34, Warszawa 1971, pp. 27–47.

Clearly the visible threshold of development for the city of Kołobrzeg and for Kołobrzeg FUA is the reconstruction and expansion of the transport system (Figures 4, 5).

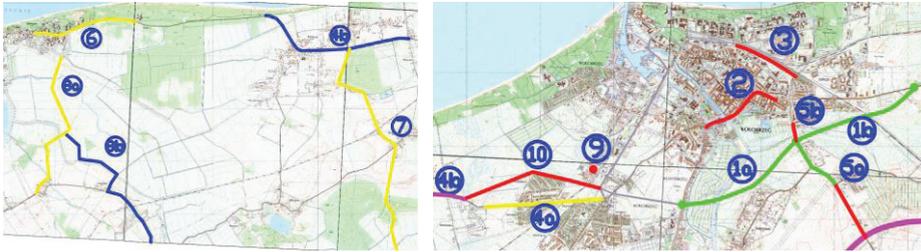


Figure 4. Investments Road FUA Kołobrzeg 2015–2020

Source: Transport policy NOF Kołobrzeg.

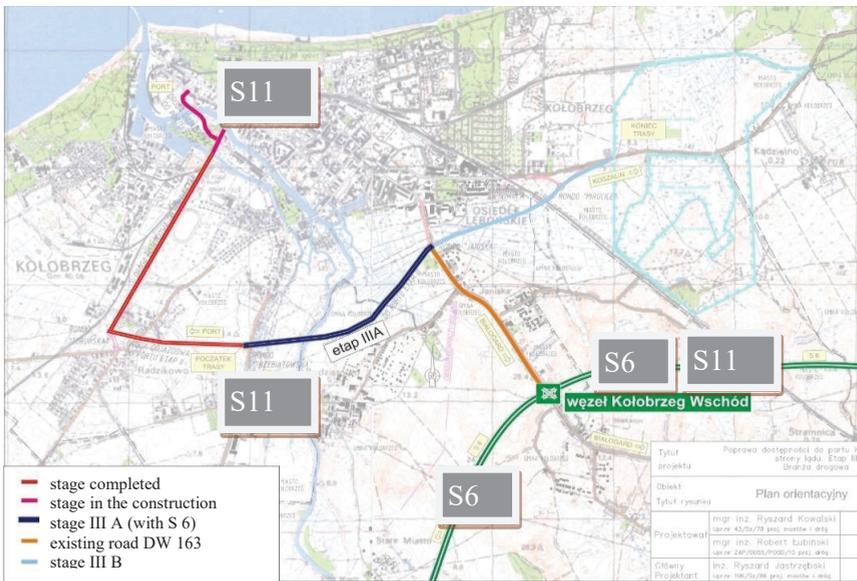


Figure 5. Target mileage of expressways S-6 and S-11 in Kołobrzeg

Source: Transport policy NOF Kołobrzeg.

Its investments (Figures 4, 5) confirm the phenomenon of crossing the threshold of the FUA Kołobrzeg development and especially the city of Kołobrzeg. The construction of a new communication system and modernization of the existing road network that will be built here make spatial arrangement supported by two ring roads. The Outer Ring Road around Kołobrzeg streamlines the movement throughout the FUA as expressway S-6 and S-11 part, and the inner ring

road serves as the final section of the S-11 around the downtown area leading from the east to the Kołobrzeg seaport junction in Kołobrzeg (Figures 4, 5).

Another measure that allows one to determine the current stage of the Threshold Theory in Kołobrzeg may be the number of dwellings (or chambers) on a global basis and the scale of the increase in housing stock, expressed in their overall floor area in m² (Table 1).¹⁶

Table 1. Housing and population Kołobrzeg in the years 1988–2013

Year	Number house	Number rooms	Usable area house in m ²	The number of residents
1988	12,551	nd.	670,063	43,538
1995	14,469	49,764	800,917	47,301
1996	14,623	50,463	815,177	47,480
1997	14,685	50,803	823,021	47,886
1998	14,787	51,250	833,933	48,082
1999	14,927	51,877	847,585	45,029
2000	15,065	52,484	863,414	45,107
2001	15,356	53,423	887,266	44,995
2002	17,153	61,862	1,084,167	44,803
2003	17,417	62,803	1,102,515	44,834
2004	17,682	63,541	1,119,308	44,932
2005	18,044	64,492	1,147,333	44,887
2006	19,034	66,616	1,205,703	44,737
2007	19,387	67,552	1,235,475	44,889
2008	19,841	68,588	1,273,972	44,925
2009	20,495	70,315	1,313,295	44,991
2010	21,275	82,206	1,445,702	47,103
2011	21,442	82,659	1,457,244	47,078
2012	21,835	83,662	1,480,514	46,951
2013	22,021	84,299	1,492,066	46,897

nd. – no data.

Source: Central Statistical Office data for the years 1988–2013. A Compilation.

In comparing the population growth (7.7%), the increase in the total number of dwellings (175.5%), and in particular, their usable area (222.5%), over the past 25 years, it can be concluded that Kołobrzeg has exceeded the threshold of sized residential development without increasing the constant population significantly while increasing the accommodation capacity of the city in the form of thousands of “second houses” and “second apartments” (Figure 6).

The spatial development of the city or the increase of the housing can be done at no cost to the threshold; however, it will take place at the expense of quality living conditions augmenting functional problems through an increase in load factors and density of the existing structure of the settlement. The preservation, and in particular, improvement of the conditions for the functioning of the urban area requires crossing the threshold of development as a result of spatial and demographic advancement.

¹⁶ J. Kozłowski, *Analiza progowa*, Prace Instytutu Kształtowania Środowiska, PWN, Warszawa 1974, p. 101.

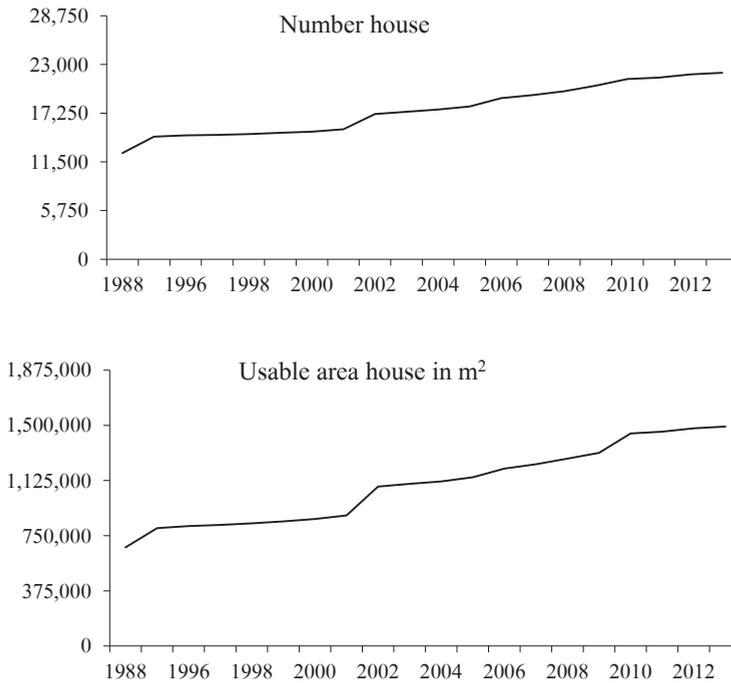


Figure 6. Increase in housing stock in Kołobrzeg

Source: my own research and development.

To sustain such an intense development of Kołobrzeg’s tourist accommodation facilities it was essential to cross the first post-war threshold of development in the form of investment in municipal infrastructure and technical support of the city. This took place in the late 1970s and the 1980s. The final crossing of the threshold of the pre-war development was carried out by architectural reconstruction, reconstruction and expansion of water supply system, sewage, gas, energy, telecommunications, and city heat sources. Heating sources were renovated in the city, low-carbon sources of air pollution were eliminated, the old waste water treatment plant was improved and expanded and a new ground water treatment plant was built, a garbage composting center was constructed, and the municipal transport fleet was modernized. The process culminated in the modernization and completion of the old pre-war spatial structure and infrastructure of the city.

Kołobrzeg’s surmounting of the threshold of the second post-war development was associated with the renovation of very large areas of former military grounds in Kołobrzeg and the construction of new residential, commercial, and health retreats. Stage I beat the previous threshold of development (technical and municipal infrastructure of the city), therefore allowing a later phase of development of the city to start crossing stage II of Kołobrzeg’s development threshold for residential and health resort areas (new residential housing and accommodation in the form of an increased number of tourist and spa facilities and “second houses” and “second apartments”) while at the same time beginning reconstruction of the transportation system of the city and the FUA.

As part of the current second threshold, developments already completed or performed services are objects of regional rank (completed Regional Sports Centre and the Regional Cultural Centre, modernized Regional Hospital, current construction of a third docking area of Yacht Marina Kołobrzeg, construction of two large shopping malls; since September 2012, the airport operates for seasonal sports and tourism with profits being invested in the development of the commercial port, fishing and passenger transport including ferry connections). Also important is the planned construction of the Regional Center of Innovation Administration and the LKN.

The next step in crossing the threshold stage II is developing major road projects (highways S-6 and S-11) also taking into account the expected change in the administrative boundaries of the city of Kołobrzeg and assuming the simultaneous absorption of several towns around Kołobrzeg, thus exceeding Kołobrzeg's current city population of 50,000 permanent residents. It is important also to create a FUA called Seaside Functional Area of Kołobrzeg up to a dozen kilometers from Kołobrzeg within the northern part of the region where the major factors are the tourist and spa suburban zones. The expected end result of the threshold stage II development for Kołobrzeg is a fully functional FUA governed by three municipalities (city of Kołobrzeg, commune of Kołobrzeg, and commune of Ustronie Morskie). It is also possible that the elimination of both rural communities combined with the simultaneous establishment of the city's new administrative commune status boundaries could receive multimillion zloty government support due to mergers and liquidation of smaller local governments.

The tight integration of both the city and commune municipalities can lead to obtaining higher status in this area of the district which covers the coastal strip of the Baltic Sea. This important area has a total length of 30 km running along the Baltic Sea coastline and a width of several kilometers which stretches from the Baltic Sea along the expressway S-6 Szczecin–Gdańsk that runs along the southern border of the FUA. If obtained, the multimillion zloty government aid could be used in carrying out the process of full integration of spatial, functional, and social communication of all the FUA towns in extended administrative boundaries. The area is now home to almost 57,000 people and, by 2030, it is expected that there could be as many as 70,000 permanent residents.

Tourism and spa accommodations of the FUA have already attained a volume of 100,000 beds in 2013, and ultimately could reach more than 130,000 beds. It is approximated that by the year 2030, FUA outside the summer season will be able to count more than 100,000 inhabitants, tourists, and patients; while in the summer the number of people may exceed 200,000. Today, on a typical tourist weekend, approximately 25,000–30,000 people may be staying in the FUA; by the year 2030, this figure could reach approximately 50,000 people provided communication with the agglomeration of Poznań (modernized railway line and the road S-11) is improved. It should also be noted that by 2030, the total target population, including tourists, that could be living a day in the season of happiness on the coast of Kołobrzeg could reach 250,000 people. This number represents the target capacity of the FUA's 30 km of beaches assuming a beach area of 10m²/person.

Modification of the TALC on the basis of the Threshold Theory

Using the above information on the range of the recent increase of population in the city of Kołobrzeg, accommodation capacity of “second homes” and “second apartments” and all formal and informal accommodation facilities used for tourism purposes can be improved by an adjusted model of threshold development. Hence the need for the appointment of key thresholds relevant to the development of such a model.

Using the threshold theory by Malisz that has been modified by Kozłowski and the TALC developed by Butler based on the life cycle of the tourist village, the building and running of a new “threshold tourist area life cycle – TTALC” can be proposed (Figure 7).

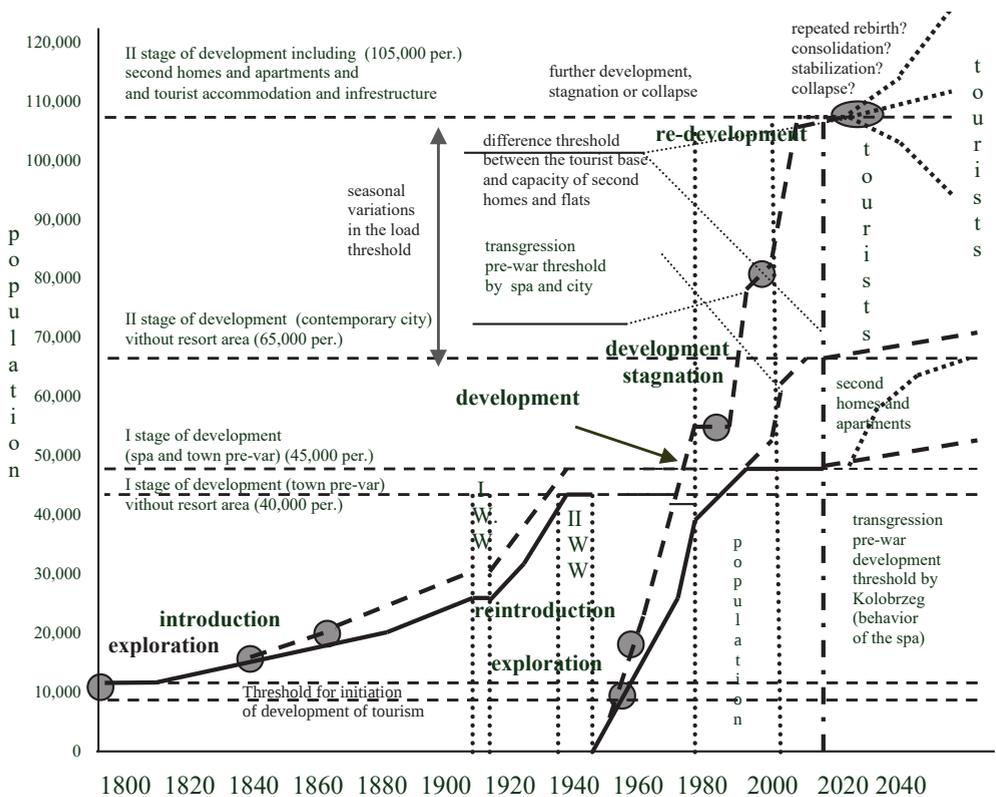


Figure 7. Change of the potential tourist area life cycle in Kolobrzeg (the concept published for the first time in 2013)¹⁷

Source: my own research and development.

¹⁷ M. Miedzinski, *Modyfikacja cyku życia obszaru turystycznego (TALC) w wyniku wprowadzenia założeń teorii progowej na bazie przestrzeni turystycznej Kołobrzegu i jego zaplecza*, in: *Współczesne problemy rozwoju turystyki w ujęciu regionalnym i lokalnym*, eds. R. Jaroszewska-Brudnicka, D. Sokolowski, UMK Toruń, Toruń 2013, pp. 213–228.

The range of the current course of spatial processes and functional changes that took place in Kołobrzeg is incomparable to any other Polish tourist area allowing one to attempt a modification of Butler's classic TALC by introducing a series of threshold elements which are closely linked to Malisz's Threshold Theory (Figure 8), thus forming the concrete premises of the threshold tourist area life cycle (TTALC). Determined on the basis of many years of research on the life cycle in the tourist area of the city – the health resort zone of Kołobrzeg, three very clearly defined periods – stages – phases can be seen.

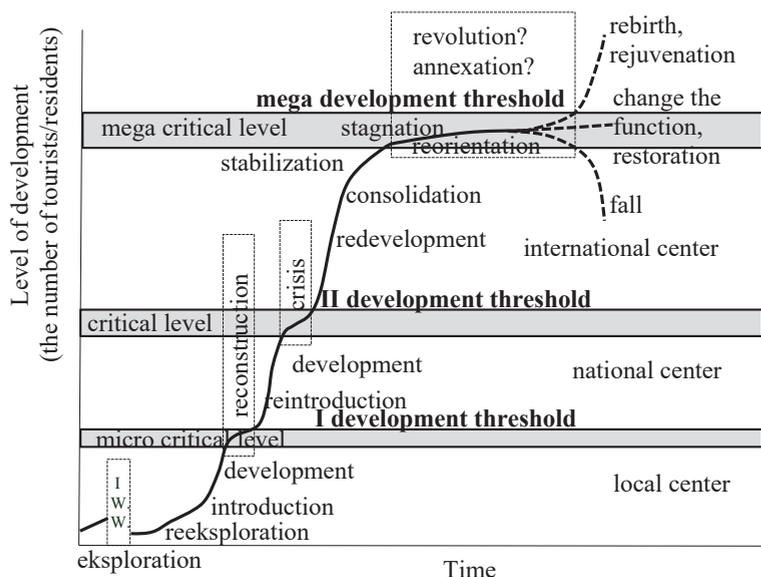


Figure 8. Proposal of the modified threshold tourist area life cycle developed on the basis of R.W. Butler, taking into account changes made by other authors

Source: own calculations based on R.W. Butler, *Tourist Area Life Cycle*, in: (CTR) *Contemporary Tourist Reviews*, OX3 9TJ, Oxford 2011, p. 33.

The derived model TTALC (Threshold Tourist Area Life Cycle) for Kołobrzeg (Figure 8) indicates the possibility of introducing a modified TTALC, the course of which would be adjusted according to the determinants of the threshold theory (i.e. population, housing, second homes and apartments, changes in the communication system, historical events) by B. Malisz and Kozłowski (Figure 8).

This model can also be applied to small tourist areas which were similarly tested and presented (Figures 9–14).

TTALC Models for selected locations FUA Kołobrzeg

The development of the FUA of Kołobrzeg was parallel to the development of the city of Kołobrzeg. The city has the longest TALC reaching back to 1830, while in the neighboring towns tourist functions developed decades later, at the same time showing significant spatial variation. Each of the analyzed villages and towns are characterized by a great diversity in time, scale, and TTALC progression (Figures 9–14).

An analysis of the development processes taking place in the tourist area of the FUA allows for a clear differentiation of those processes in the context of a modified TALC. Detailed studies of the stages of the life cycle have been carried out in six FUA villages and towns which constitute the most equipped and urbanized part of the district of Kołobrzeg. These places represent different life cycles and modification of their course is strongly determined by historical events, political decisions, changes in population size, and changes in the pace and scope of the expansion of tourist accommodations including second houses and apartments. Each of these locations also have significant functions that help form the nature of the dominant and most popular facilities. It is also possible to set developmental thresholds based on previously planned or existing tourist destinations. Interestingly, there is even a strong variation between the villages in a single settlement system – in this case, FUA Kołobrzeg.

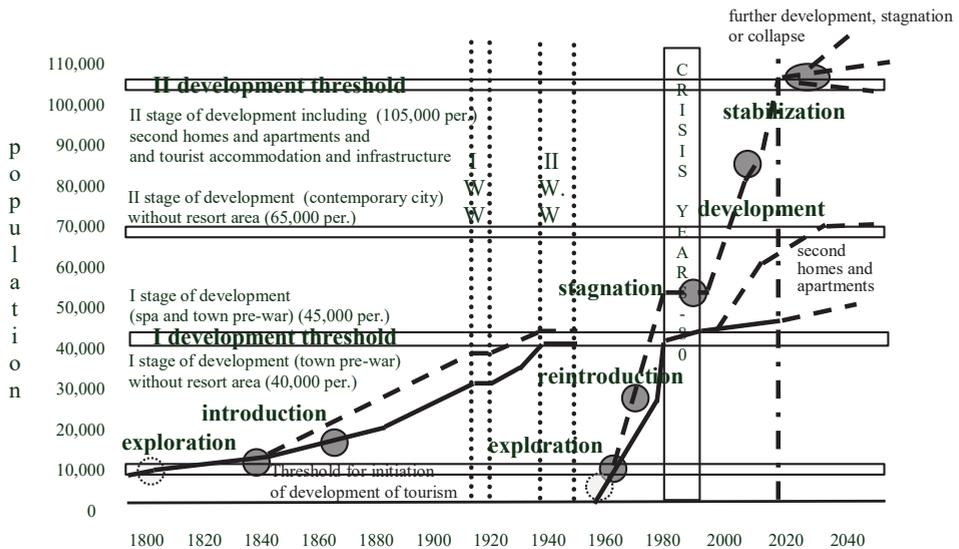


Figure 9. TTALC models for selected villages of the FUA of Kołobrzeg – Kołobrzeg (pop. 47,000; approx. 48,000 beds)

Source: the author's compilation.

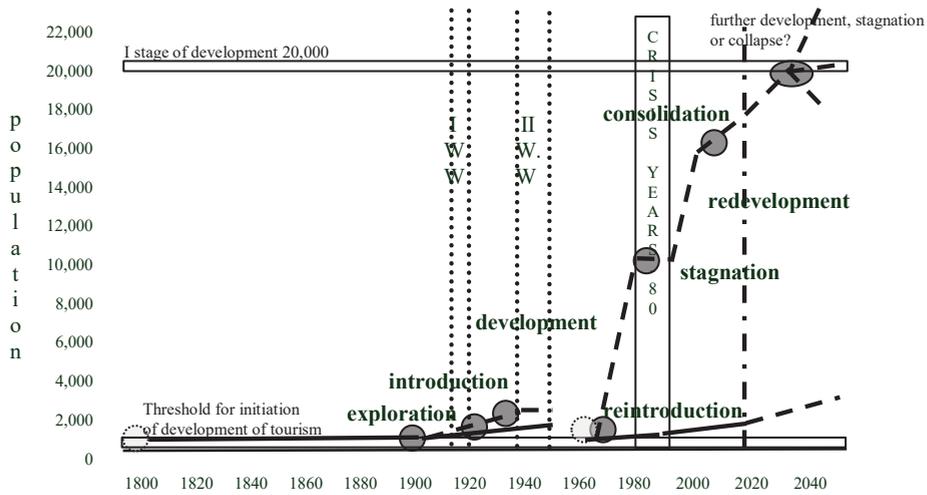


Figure 10. TTALC models for selected villages of the FUA of Kołobrzeg – Dźwirzyno (pop. 710; approx. 17,500 beds)

Source: the author's compilation.

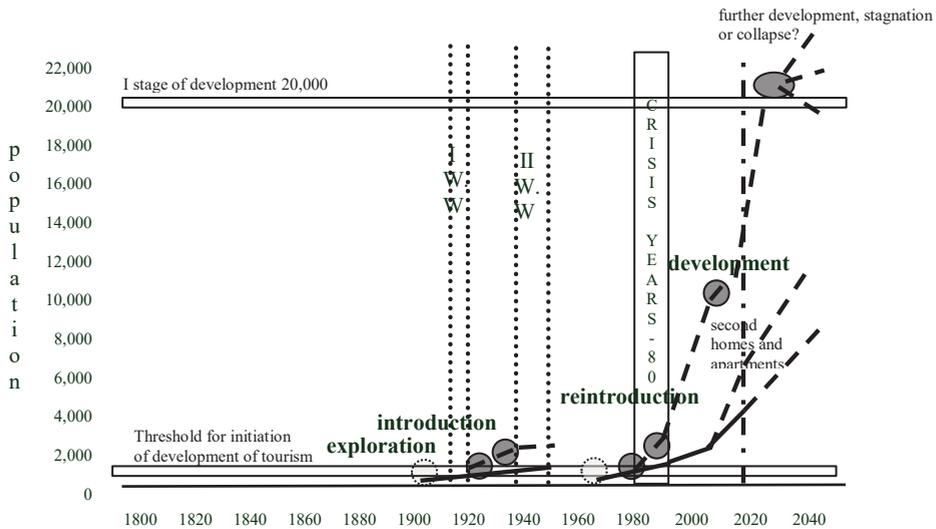


Figure 11. TTALC models for selected villages of the FUA of Kołobrzeg – Grzybowo (pop. 1,650; approx. 9,900 beds)

Source: the author's compilation.

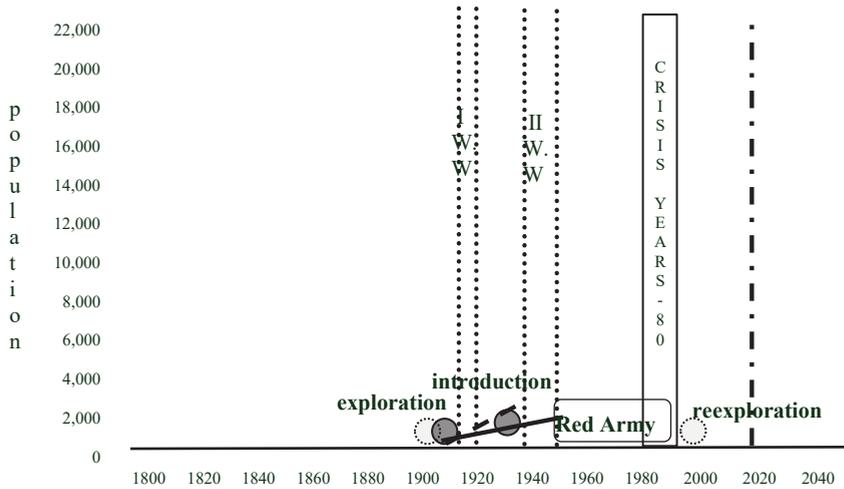


Figure 12. TTALC models for selected villages of the FUA of Kołobrzeg – Bagicz (pop. 10; 0 beds)

Source: the author's compilation.

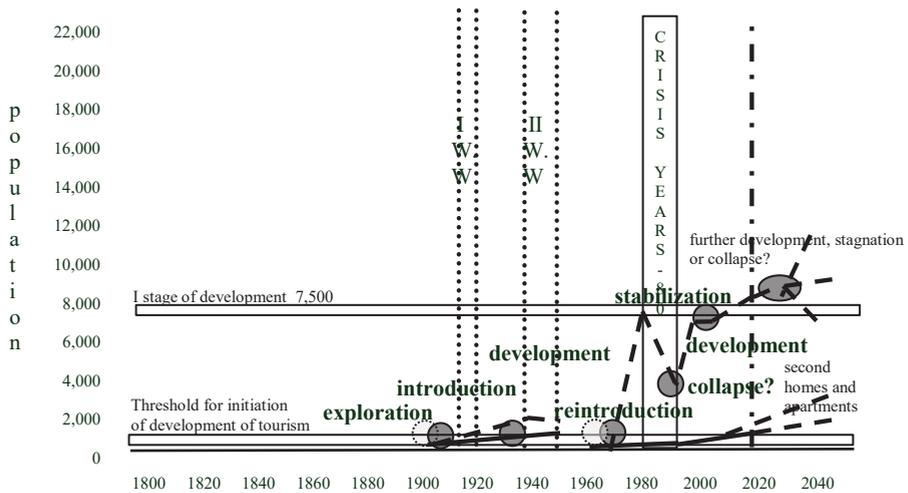


Figure 13. TTALC models for selected villages of the FUA of Kołobrzeg – Sianożyty (pop. 450; approx. 6,300 beds)

Source: the author's compilation.

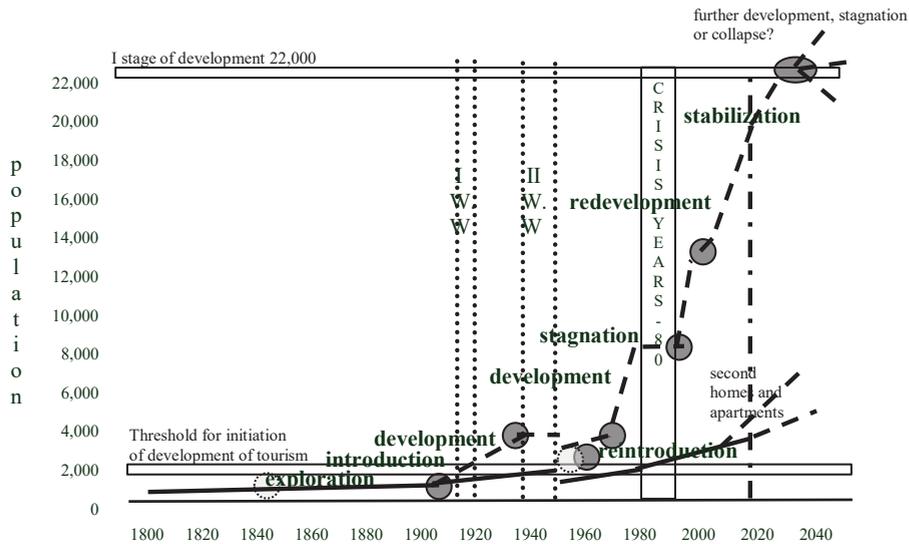


Figure 14. TTALC models for selected villages of the FUA of Kołobrzeg – Ustronie Morskie (pop. 2,200; approx. 16,300 beds)

Source: the author's compilation.

Conclusion

Kołobrzeg, in the first decade of the 21st century, reached a milestone in its urban spatial and functional development in the context of both the traditional TALC and the classical theory of thresholds. In the proposed model of the “threshold tourist area life cycle” (TTALC), the author, using Kołobrzeg as an example, combines the classic TALC with the threshold theory.

Using the TTALC model it can be concluded that:

1. When taking into account the current TTALC developmental thresholds, each arbitrarily chosen tourist area can develop according to the classical modified TALC.
2. The key developmental thresholds are physical, functional, technological and structural limitations. Developmental determinants should also include such phenomena as armed conflict, economic crises, revolutions, political and territorial changes. In reference to the TTALC model, these determinants can be mentioned.
3. The existing classic TALC usually included one unbroken life cycle not encompassing the usual associated accelerations and decelerations (fluctuations) involved in its long run.
4. The simplification of a graph of the long course of TALC and its multi-step developmental cycles may be supplemented by the threshold determinants allowing for more accuracy in the course of the TTALC.
5. In the course of the TTALC analysis two factors should be taken into consideration: changes in the demographic potential and capacity of second homes and apartments in the tourist

area and the location of temporary key infrastructure investments through which have been or will be achieved developmental limits in the study area.

6. In the analysis of the tourism capacity and related developmental thresholds for each tourist resort or area, three components should be taken into account on the basis of the size of the active publicly accessible tourist accommodation data: the fixed population (residents), the number of residential population (owners of second homes and apartments), and the number of semi-permanent tourists (patients). These figures allow us to set a threshold for the development of a village or town as well as other specific thresholds; for example: a year-round tourist threshold, a seasonal tourist threshold, a typical residential threshold, a residential development threshold (second homes and apartments), and the development thresholds including the peak (seasonal) thresholds for a given locality or tourist area.
7. The TTALC allows for precise determination of the level of development of the tourist area in the past, present, and foreseeable future, taking into account the population and the capacity of second homes and apartments and tourist accommodation.
8. The analysis carried out, combined with the ability to apply in practice in the example of Kołobrzeg and its FUA, allow us to believe that the proposed TTALC will be helpful in conducting the researches made in various towns and tourist areas.

R.W. Butler's classic theory of TALC and B. Malisz's Threshold Theory show some similarity and compatibility with respect to each other resulting in the proposed TTALC. These features allowed us to derive a new joint model under the name Threshold Tourist Area Life Cycle. The proposed model obviously requires further research and empirical confirmation.

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TWORZENIE MODELU PROGOWEGO CYKLU ŻYCIA OBSZARU TURYSTYCZNEGO NA PRZYKŁADZIE MIEJSKIEGO OBSZARU FUNKCJONALNEGO KOŁOBRZEG

SŁOWA KLUCZOWE

Kołobrzeg, miejski obszar funkcjonalny, teoria progowa, cykl życia obszaru turystycznego, progowy cykl życia obszaru turystycznego

STRESZCZENIE

Opracowanie stanowi próbę kolejnej modyfikacji cyklu życia obszaru turystycznego (TALC) stworzonego przez R.W. Butlera. Do zmodyfikowanego TALC autor wprowadza założenia Teorii Progowej B. Malisza bazując na badaniach Kozłowskiego. Efektem tych działań jest stworzenie modelu progowego cyklu życia obszaru turystycznego (TTALC). Model teoretyczny oraz jego przebieg został następnie przetestowany na bazie FUA Kołobrzeg nazywanego Nadmorskim Obszarem Funkcjonalnym Kołobrzeg. Jest to jeden z najlepiej rozwiniętych tego typu regionów turystycznych Polski a do potwierdzenia jego progowego rozwoju użyto stwierdzonych przekroczeń progów rozwojowych popartych rozwojem infrastruktury technicznej, bazy noclegowej oraz ilości i wielkości powierzchni użytkowej substancji mieszkaniowej także w formie II domów i mieszkań. Podsumowaniem opracowania jest testowanie TTALC na przykładzie wybranych miejscowości turystycznych wchodzących w skład FUA Kołobrzeg w tym miasta – uzdrowiska Kołobrzeg.

THE CURATIVE FUNCTION OF THE VILLAGE – INFRASTRUCTURE, ENVIRONMENTAL RESOURCES, CURATIVE MATERIALS

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KEYWORDS | spa, dominant function of a village, curative function

ABSTRACT

The study involves an unusual function of the village, i.e. the curative function present in a small number of towns in Poland. The subject of research includes two Lower-Silesian villages: Przerzeczyn-Zdrój, Długopole-Zdrój and one village from the Świętokrzyskie Province – Solec-Zdrój. As is the case with most highly developed states, the contemporary village in Poland is no longer a settlement inhabited exclusively by farmers. It may serve various functions. A significant number of inhabitants in villages make their living through non-agricultural work performed either in or beyond their place of residence. One of these functions, uncommon for Polish villages, is the curative function found in places having curative potential, especially in the context of environmental conditions (the existence of curative mineral waters or a therapeutic climate) as well as infrastructural conditions.

Introduction

In the most developed states around the world the village is no longer a settlement exclusively inhabited by farmers. This is also true for Poland. Villages can serve a variety of functions. A large number of their inhabitants make a living by working outside of agriculture either within or beyond their place of residence. There are villages in Poland which predominantly pursue the tourist function, including the curative function.

Curative tourism has its roots in the ancient times when people visited hot springs and bathing sites, as well as locations characterised by more favourable climatic conditions.¹

There is a total of 45 spas functioning in Poland, the largest number of which is located in its central part (the Kujawy–Pomerania Province and the Świętokrzyskie Province), followed by those in the seaside zone (7). From among all the spas, 12 are rural spas (Dąbki, Długopole-Zdrój, Goczałkowice-Zdrój, Horyniec-Zdrój, Polańczyk, Przerzeczn-Zdrój, Rymanów-Zdrój, Solec-Zdrój, Wapienne, Wieniec-Zdrój, Wysowa-Zdrój, Żegiestów).

As formulated in the encyclopaedic definition of the village (Latin: *pagus, rus*), a village is a “settlement unit characterised by a concise, clustered or dispersed architecture and existing agricultural functions or their respective functions related to services and tourism, with no urban rights or city status.” There are also other interpretations: “the village is a settlement the inhabitants of which are involved in the cultivation of plants and the animal husbandry;”² “a village is an assembly of people or settlements with the respective lands they own;”³ “the village is a local community whose productive function is complemented by the family function in a uniform manner while maintaining social control;”⁴ “a village is a territorial creation with a set of borders, a land layout, a farm house (homestead) which forms a spatial unit with its determined social bonds and legal regulations.”⁵

These definitions are in no way a reflection of reality and are not always applicable to the contemporary character of the village. The current situation is that the agricultural functions no longer have to be dominant in many villages, as is apparent e.g. in the conducted analyses and studies presented in this article.

The main aim of the research is to analyse a selected set of rural curative centres in the context of environmental determinants, their curative offer and available infrastructure, which constitute the curative potential that eventually decide upon the quality of provided tourist services.

Research methods

The study comprises an analysis of selected spas with respect to environmental, social and landscape-related determinants, the curative offer and infrastructure, the authors of the study have made use of source material retrieved from personal observations (direct observation), which has the benefit of a providing a high level of data reliability and possibilities for their direct interpretation. The information found in the source material, which serves as a basis for the conducted research, is not stored by the information departments of national statistical services or other units operating in the domain of real estate. The comparative analysis method has been utilised in the analysis of data.

¹ N. Douglas, *Travelling for Health: Spa and Health Resorts*, in: *Special Interest Tourism: Context and Cases*, eds. N. Douglas, R. Derrett, John Wiley & Son, Milton, QLD 2001, pp. 260–282.

² M. Kielczewska-Zaleska, *Geografia osadnictwa*, Warszawa 1972.

³ J. Szymański, *Nauki pomocnicze historii*, Wydawnictwo Naukowe PWN, Warszawa 2004, pp. 640–671.

⁴ J. Turowski, *Socjologia. Małe struktury społeczne*, Lublin 1993.

⁵ J. Tkocz, *Organizacja przestrzenna wsi w Polsce*, Wydawnictwo UŚ, Katowice 1998.

This method is used to determine and evaluate the essential cause and effect relations present in the studied subjects.

Three selected spas have served as the subject for direct observation: Długopole-Zdrój, Przerzeczyn-Zdrój and Solec-Zdrój. The research has been conducted on the basis of the direct and indirect inventory. The direct inventory involves field work: urbanist inventories, land inventories as well as photographs and sketches. Special attention has been paid to the environmental values of the spa serving as a potential subject for possible development as well as to the adaptation possibilities of each structure and elements related to tourism in its broadest sense, including spa tourism. This has been followed by an attempt to evaluate the functioning rural spas, also in the context of the functional relations between each spa and the permanent settlement unit.

The indirect inventory involves the gathering of information regarding the history of the construction of the studied spas and the functioning of each specific curative structure. This part of research has been based on the materials retrieved in the studied municipalities, community interviews and information included in the literature on the subject. The gathered information has been verified through the photographic documentation. In the course of the analyses, the authors have indicated the essential environmental values as contributing to the further development of the spa, both in the context of the curative function as well as the recreational function in its broadest sense.

This article is an introduction to the quantitative assessment of the selected spa village.

Outlining the selected spas

Przerzeczyn-Zdrój is a small Lower Silesian village located by one of the most important communication passageways in Poland, the National Road 8 from Kudowa-Zdrój to Wrocław. Some of its most noteworthy values include: its climate, curative mineral waters (sulphidic, radioactive with calcium and magnesium, as well as ferrogenous waters) – due to their chemical composition they are unique not only in the scale of Poland, but also in Europe.⁶ Climate comfort is commonly found in the spa.⁷

Długopole-Zdrój, just like Przerzeczyn-Zdrój is also a Lower Silesian village and the smallest, relatively unknown spa in the Kłodzko land, located near a road leading from Kłodzko to Międzyzlesie and the Międzyzlesie Pass. It is characterised by an extraordinarily mild montane medium stimulus climate typical of the Sudety valleys, as well as large differences in temperature and humidity per 24 hours. The climatic conditions in the area foster rest, rehabilitation and the restoration of health. The town is stretched out at a distance of circa 1 km, mainly along the left bank of the River Nysa Kłodzka. It is not as popular as other spas in the Kłodzko Valley, such as:

⁶ H. Piechaczek, M. Wyka, *Przerzeczyn Zdrój*, „Problemy Uzdrawiskowe” 1975, Part III, No. 4 (92), pp. 70–74.

⁷ I., T. Kaczyński, *Polska. Najpiękniejsze uzdrowiska*, Sport i Turystyka – Muza SA, Warszawa 2006, pp. 31–33, 70–72, 259–261.

Kudowa-Zdrój, Polanica-Zdrój, Duszniki-Zdrój, which is why it is far more peaceful and not as crowded.⁸

Solec-Zdrój is a municipal village located in the Land of Sandomierz, in a lowland region, located about 25km away from the Busko-Zdrój spa.⁹ The spa encompasses the entire municipality, which includes 19 villages of the Solec-Zdrój municipality. The spa is an ecological oasis (the village and all neighboring villages are fully connected to a gas supply). It is a quiet, serene town with clean air. The climate here is friendly for the body and is characterised by a minor spatial diversity of climatic conditions. Climate comfort is common in this area during almost half of each year.¹⁰ The Solec-Zdrój spa has the more than 170 years old tradition of curative treatment, with the local medicinal waters being the most valuable natural resource available. The features of the studied towns have been represented below (Table 1).

Table 1. Outline of the studied curative villages

No.	Selected features	Przerzeczyn-Zdrój (German: <i>Bad Dirsdorf</i>)	Długopole-Zdrój (German: <i>Bad Langenau</i>)	Solec-Zdrój
1.	Location	Niemcza Municipality, Dzierżoniów County, Lower Silesian Province, in the foothills of the Sudety, at the foot of the Owl Mountains	Bystrzyca Kłodzka Municipality, Kłodzko County, Lower Silesian Province, at the foot of the Bystrzyckie Mountains, in the Nysa Kłodzka Valley	Municipal village in the Busko County, in the Świętokrzyskie Province, by the River Rzęska, on the south-eastern edge of the Solec Basin
2.	Number of inhabitants (registered for permanent residence)	700 inhabitants (as of December 2012)	610 inhabitants (as of December 2012)	900 inhabitants (as of December 2012)
4.	Area of village occupied	No data	78.6 ha	654
5.	Type of village	multi-street	small, linear	
5.	Total permanent employment		183	387
6.	Total permanent employment in the curative branch	No data	98	100
7.	Agricultural farms	No data	No data	No data
8.	Economic activity (number of business entities)	No data	No data	56

Source: own elaboration.

Analysis of the studied spa villages

From a ruralist's point of view, the space of the analysed villages can be divided into two parts: the curative part located on the outskirts of the village near green areas (with sanatorium structures)

⁸ M., R. Łazarkowie, *Uzdrowiska w Europie. Tężeńszczość i rys historyczny*, Wydawnictwo Akademickie Wyższej Szkoły Społeczno-Przyrodniczej im. Wincentego Pola w Lublinie, Lublin 2007, pp. 70, 90.

⁹ Ibidem.

¹⁰ E. Gonda-Soroczyńska, *Przestrzeń uzdrowiskowa w krajobrazie kulturowym wsi na przykładzie uzdrowiska Solec-Zdrój*, „Infrastruktura i ekologia terenów wiejskich”, Polska Akademia Nauk, Komisja Technicznej Infrastruktury Wsi, Kraków 2011, f. 1, pp. 39–49.

and a residential part with a low, single family architecture and a former post-factory architecture. It proves beneficial for the functioning of the spa and the use of rehabilitation and health restoration services when the curative part is separated from the rest of the village. Przerzeczyn-Zdrój is a town which existed since the year 1264 under the name of Pyrzyce (Slavic etymology). Bad Dirsdorf was the name used during the German colonisation, while Diersdorf functioned as its name until the end of the 19th century and also in the 20th century, up till 1945. The current name, functioning since after the second world war is Przerzeczyn-Zdrój.

As a village, Długopole-Zdrój mostly comprises of a villa-type architecture, typical for a garden-city and characteristic of spas. Most buildings in the spa requires conservation protection, as they form a relatively uniform set with features typical for the resort architecture of the turn of the century.¹¹ A large number of pensions and residential houses from the 1850s and the early 1900s still remain in the village.

Solec-Zdrój is a small lowland municipal village with circa 900 residents, located in the Busko County in the Świętokrzyskie Province. It has the status of a spa and is located on the outskirts of the Nida Basin, in the south-eastern edge of the Solec Basin, on a small incline on the edge of the Małopole Upland and the Sandomierz Basin, at an altitude of 160 m.a.s.l. and circa 20 km from Busko-Zdrój. The village is situated by the River Rzęska and exists since the 14th century. Its name is derived from the salty seepage spring area that once existed in the nearby meadows. From the 18th century on the local waters have been used to boil salt.¹²

Tables 2–4 include the basic information regarding environmental determinants, curative offers and spa infrastructure.

The spas selected for analysis offer treatment for a variety of illnesses, with Przerzeczyn-Zdrój having the least impressive curative offer available, but also having unique mineral waters at its disposal (sulphidic-radioactive waters). The remaining spas cover a much larger amount of illnesses based on their supply of curative waters. It should be noted that the resources found at Długopole-Zdrój can be considered practically inexhaustible, as they include waters which constantly refill themselves and undergo constant mineralisation with the contribution of the CO₂ 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.

Throughout the ages the analysed spas have not changed with regard to their spatial-functional layout. All of them make use of a curative infrastructure whose beginnings can be traced to the first half of the 19th century (1824–1840). The true development of the spas occurred in the early 20th century, both in Poland (Solec-Zdrój) and in contemporary Germany (Przerzeczyn-Zdrój, Długopole-Zdrój), which resulted in the further reconstruction of the curative spa. A major factor for the location of spas are the environmental resources including medicinal water springs, the

¹¹ W.W. Gaworecki, *Turystyka*, Polskie Wydawnictwo Ekonomiczne, Warszawa 2003.

¹² E. Gonda-Soroczyńska, *Przestrzeń uzdrowiskowa w krajobrazie kulturowym wsi na przykładzie uzdrowiska Solec-Zdrój*, „Infrastruktura i ekologia terenów wiejskich” 2011, Vol. 1, Polska Akademia Nauk, The Rural Technical Infrastructure Commission, Kraków 2011, pp 39–49.

landscape, organised green areas including spa parks, which are an indispensable element of any spa, as well as non-developed green areas which create a specific atmosphere.

Table 2. Basic information regarding the environmental determinants in the Przerzeczyn-Zdrój, Długopole-Zdrój and Solec-Zdrój spas

No.	Selected features	Przerzeczyn-Zdrój (German: <i>Bad Dirsdorf</i>)	Długopole-Zdrój (German: <i>Bad Langenau</i>)	Solec-Zdrój
I. Environmental determinants				
1.	Mineral water springs	self-refilling sulphidic water borehole no. 2 in the form of a 6 m deep shaft with 1.6 m ³ efficiency per hour; 70 m deep self-refilling radon-sulphidic water borehole no. 9 with an efficiency of 3 m ³ per hour; 182 deep self-refilling magnesium-calcium water borehole with an efficiency of 15 m ³ /hour	The “Emilia”, “Kazimierz”, “Renata” water intakes. The “Renata” spring provides 0.13% mineral bicarbonate, calcium, magnesium, sodium, silicon, ferruginous, water. The “Emilia” spring provides low mineralised 0.08% bicarbonate, calcium, magnesium, radon, ferruginous water. The “Kazimierz” spring provides 0.11% mineral bicarbonate, calcium, magnesium, sodium, ferruginous water	The “Karol” spring, which provides chloride-sulphide-sodium, bromide, iodide, boron, sulphidic water with a hydrogen sulphide content of 70 mg/l; the Solec Shaft intake providing 2.06% bromide, boron, iodide, sulphidic brine with a hydrogen sulphide content of 120 mg/l
2.	Existing curative mineral waters and other curative materials	Sulphidic and sulphidic-radioactive waters, peloids	Bicarbonate-calcium-sodium-magnesium ferruginous sorrels, radioactive sorrels, alkaline sorrels; herbalism, peloids, drinking therapy	unique water spring with hydrogen sulphide content in the brine eight times greater than contemporary springs (sulphide ion concentration – 103 mg/l, high mineralisation). The Solec sulphur is the strongest available curative water in Poland and on of the best in Europe
3.	Climate	“Central” bioclimatic region 4, weak, at times medium stimulus bioclimate, lowland and valley spa, favourable conditions for climatotherapy (areas with good air circulation and good air hygiene level, dry ground, average yearly sum of precipitation – 596 mm	“Submontane and mountain” bioclimatic region 6, medium, at times strong stimulus bioclimate type, average sunlight hours per year – 1,547 hours; relatively high speed of wind blowing along the axis of the Nysa Kłodzka Valley, best conditions for climatotherapy from May to October	Lowland climate, medium stimulus type, mildly modified by a pine forest complex, friendly towards the body, with relatively low spatial diversity of climatic conditions, climate comfort for almost half of each year, annual precipitation – 570 mm

Source: own elaboration based on: T. Kozłowska-Szczęsna, K. Błażejczyk, B. Krawczyk, D. Limanówka, *Bioklimat uzdrowisk polskich i możliwości jego wykorzystania w lecznictwie*, PAN, Warszawa 2002, pp. 99–112, 385–389, 418–421.

Table 3. Basic information regarding the curative offers available at the Przerzeczyn-Zdrój, Długopole-Zdrój and Solec-Zdrój spas

No.	Selected features	Przerzeczyn-Zdrój (German: <i>Bad Dirsdorf</i>)	Długopole-Zdrój (German: <i>Bad Langenau</i>)	Solec-Zdrój
II. Curative offer (curative materials)				
1.	Number of vacancies for patients	280	270	400
2.	Treated illnesses	Orthopaedic and traumatic disorders, rheumatologic diseases, neurological diseases	Orthopaedic and traumatic disorders, peripheral arthery diseases, digestive tract diseases, rheumatologic diseases, haematologic and blood diseases, liver diseases, diabetes, neurosis, gastric diseases, asthma, cardiovascular diseases, rehabilitation of mastectomy patients	Rheumatoid arthritis, ankylosing spondylitis, soft tissue gout, radiculitis, post-traumatic conditions, discopathy, neuralgia, skin diseases, cardiovascular diseases and respiratory tract diseases, neurosis, heavy metal poisoning, osteoporosis
3.	Treatments	baths (curative baths in pools, curative baths in tubs), hydrotherapy, peloid therapy (peloid treatment), paraffin wax wraps, massages (underwater massages), inhalations, kinesitherapy (exercises)	Pearl baths with aromatherapy, carbonic acid baths, hydrotherapy (showers), peloid therapy (peloid treatment), elctrotherapy, ultrasound therapy, inhalations light therapy, heat therapy; kinesitherapy; phytotherapy (herbalism); dry CO ₂ baths	Tub baths in brines and sulphidic waters, peloid therapy (peloid treatment), hydrotherapy, inhalations, dry and underwater massages, kinesitherapy (exercises), electrotherapy, light therapy

Source: own elaboration based on: I., T. Kaczyński, *Polska. Najpiękniejsze uzdrowiska*, Sport i Turystyka – Muza SA, Warszawa 2006, pp. 31–33, 70–72, 259–261.

Table 4. Basic information regarding curative infrastructure

No.	Selected features	Przerzeczyn-Zdrój (German: <i>Bad Dirsdorf</i>)	Długopole-Zdrój (German: <i>Bad Langenau</i>)	Solec-Zdrój
1	2	3	4	5
III. Curative infrastructure				
1.	Sanatoriums	4 sanatoriums: “Forsycja” (Forsythia) – the town’s largest spa facility (60 vacancies); “Akacja” (Acacia) with a treatment complex, a gym, a services office, body care and health offices; “Buk” (Beech); “Cis” (Yew) (162 beds), natural therapy resort in the “Akacja” sanatorium	The “Mieszko” sanatorium (100 vacancies); The “Ondraszek” sanatorium (54 vacancies); The “Dąbrowka” sanatorium (70 vacancies); The “Fortuna” sanatorium (46 vacancies); The “Karol” natural therapy resort; The “Ondraszek” spa clinic	The “Hotel” sanatorium (from 1918), the “Jasna” villa, a sanatorium (from 1910), the “Prus” villa (from 1918), the “Irena” villa, the „Krystyna” rehabilitation and recreation centre, the “Solanna” curative pension and spa and sanatorium

1	2	3	4	5
2.	Curative infrastructure	1824 – Spa House; 1840 – its reconstruction and modernisation, works begin on the construction of a Spa Park, rehabilitation pool	Well-room by the “Emilia” spring (Brunnenfuhlhaus) built in 1840 replacing a wooden bathroom from 1817 – currently the “Karol” natural therapy resort, 16 Zdrojowa st. from 1839, reconstructed in the years 1870-71, wooden walking hall – currently the Spa House on 2 Wolna st. from the beginning of the 20 th century, reconstructed in 1930, the “Horus” café – the former Evangelical Church in the Eastern Park from 1893, the “Zdrojowa” café – former walking hall from 1840	Treatment, bathing and housing structures from 1837; spa structures, the natural therapy resort from 1923-1925, the “Zdrój Solecki” building, the Curative Services Office Pavilion from 1910, the “Hotel” sanatorium from 1918, the “Jasna” villa sanatorium from 1910, the “Prus” villa from 1918, the “Irena” villa, the “Krystyna” rehabilitation and recreation centre, the “Solanna” curative pension and spa and sanatorium
3.	Spa Park	3.0 ha, dating from the 18th century, changes in the first half of the 19th century; a stream, waterfall and fitness trail within the park	Spa Park with the old tree stand, decorated with a 600 m long linden/maple alley and fountain with adjacent gazebo	11 ha; with a retention reservoir, an equipment rental shop, a beach volleyball field and beach; the Rzęska river crosses the park and forms a picturesque composition with the landscape; there is a unique tree stand with exotic tree specimens within the park
4.	Other green areas	Park near the palace, fruit orchards, allotment gardens, non-developed green areas, environmental-educational trail	Fitness trails	A mixed forest complex with the dominance of pine trees adjacent to the Spa Park (120 ha)
5.	Elements of small architecture	fountain, aesthetic benches, trash bins, lanterns, pergola	fountain, aesthetic benches, trash bins, lanterns, pole shrine dedicated to the Virgin Mary	fountain, aesthetic benches, trash bins, lanterns

Source: own elaboration.

The current curative infrastructure is subject to protection due to its high cultural value. The sanatoriums and well-rooms are true pearls of curative architecture from the 19th and early 20th century. During a search for rock salt deposits in 1815 rich sources of mineral water with medicinal properties have been found that were similar to the waters existing in the Busko-Zdrój spa town. As a result of the later geological research, a source of mineral water unique on a worldwide scale was discovered in the vicinity of the spa. The content of hydrogen sulphide in the brine was eight times greater than that found in contemporary springs. The Solec sulphur is the strongest available curative water in Poland and one of the best in Europe. The mineral waters located in this area contributed to the founding of the spa, the development of the village, especially in the curative context, and to the survival of the difficult years of the governmental transformation in Poland, which was especially damaging towards rural areas. The mineral waters helped the town survive the hardest of times.

As claimed by Woodroff¹³, Zeithaml¹⁴, Hallem *et al.*,¹⁵ the development of spa treatment is based on environmental resources, the tradition of the lands and the curative infrastructure the beginnings of which can be traced to the 19th century. The developing countries are interested in looking for new ways to promote their infrastructure and abilities and to attract medical tourists, increase their number and, most importantly, increase their satisfaction. There is no doubt that preventive health care, taking care of one's well-being, relaxation and active recreation are an integral element of the 21st century tourism.¹⁶

One may observe that such transformations also take place in the studied spas, while part of the facilities within them are being privatised.

Curative protection zones have been established in order to protect the natural materials required to pursue and develop spa treatment and to develop other environmental factors for the spa (Table 5).

Table 5. Curative protection zones in the analysed spa towns (ha)

No.	Spas	Curative protection zones „A”	Curative protection zones „B”	Curative protection zones „C”
1.	Przerzeczyn-Zdrój	60.10	259.9	4,128.00
2.	Długopole-Zdrój	40.10	592.00	1,574.10
3.	Solec-Zdrój	84.00	544.00	8,490.00

Source: own elaboration.

Three curative protection areas have been delineated in the spas. The “A” zone is characterised by the most severe restrictions.¹⁷ The “A” curative protection zone is a functional extension of the nearest vicinity of the spa treatment facilities and structures. The main goal pursued through curative protection is to ensure that urban development does not eliminate, limit or transform the natural conditions of the spa. The “B” zone is a buffer zone of the spa's very centre and usually serves as an area of development related to services, tourism and housing, with no negative impact on the curative properties of the spa. The “C” protection zone is a buffer zone for zones “B” and “A”, encompassing the area which influences the maintaining of values related to the landscape, the climate and natural curative material deposits. A set of prohibited activities is established for each curative protection zone.

¹³ R.B. Woodroff, *Customer Value: the Next Source for Competitive Advantage*. “Journal of the Academy of Marketing Science” 1992, No. 25 (2), pp. 139–153.

¹⁴ V.A. Zeithaml, *Consumer Perceptions of Price, Quality and Value: a Means-End Model and Synthesis of Evidence*, “Journal of Marketing” July 1998, 52, pp. 2–22.

¹⁵ Y. Hallem, I. Barth, A. Triki, *Customer Perceived Value of Medical Tourism: an Exploratory Study. The Case of Cosmetic Surgery in Tunisia*, in: *Health, Wellness and Tourism: Healthy Tourists, Healthy Business?*, Proceedings of the Travel and Tourism Research Association Europe 2010 Annual Conference, 1–3 September, Budapest, Hungary 2010.

¹⁶ A. Rapacz, A. Mroczek-Czetweryńska, *Kierunki rozwoju rynku usług SPA & Wellness na Dolnym Śląsku*, Zeszyty Naukowe Uniwersytetu Szczecińskiego, Ekonomiczne Problemy Turystyki nr 2 (26), Szczecin 2014, pp. 247–262.

¹⁷ Curative protection zones are established on the basis of the Act on spa treatment, spas and curative protection areas and spa municipalities from July 28, 2005.

Discussion

The weaknesses of the studied spas include: the low standard of a part of the accommodation infrastructure (shared sanitary units, lack of modern equipment); the small amount of parking spaces located around the sanatorium structures; the insufficient level of activities related to recreation, tourism, culture and entertainment offered in the towns (cafés, restaurants, stores); the unaesthetic character of the towns' infrastructure. As for threats which have a negative impact on the development of the towns, these include: delays in and slow execution of eliminating natural environment pollution, including the lack of sewage plants; heavy automobile traffic in the town centres, unecological CO boilers using solid fuels (coal, coal dust). The towns have insufficient funds for investment, modernisation and effective promotion.¹⁸ The flood risk (e.g. in Długopole-Zdrój) is a serious issue. The Nysa Kłodzka is a dangerous river. July of 1997 brought about the flood of the century, which inflicted massive damage. Flood risk is a real threat for Nysa Kłodzka, as flooding may reoccur in the case of similar catastrophic rainfall. The flood protection work undertaken after the 1997 flood do not guarantee the full safety of the spa, as it is impossible to predict the size of a potential future storm.

There is, however, a number of strengths to the spas which can be indicated. These include: the valuable resources, such as natural curative waters; the diversity of treatment profiles; specialist treatment profiles; good opinions regarding the curative values, efficiency and quality of therapy among individual and institutional clients; an experienced medical staff, the professional activity and qualifications of the employees; the partially modernised accommodation spa infrastructure adapted for the disabled; the modernised treatment infrastructure and specialist treatment equipment; values related to small towns, the peaceful conditions for one's stay, a close connection with nature; social activity.

Conclusions

The analyses conducted for the selected rural status spa towns have allowed to formulate the following summary:

1. Rural spas are usually quiet, serene places providing a pleasant stay for their visitors. They provide the patients with the proper conditions for rest, regeneration and a return to health.
2. Natural environment, the accompanying vegetation, the delineated resting areas, the medicinal effect of the curative waters and the high quality of equipment used in treating illnesses make the spas fully deserving of the status which they lack and which is typical of larger curative centres.
3. As once was the case with agriculture, tourism – including curative tourism – should produce its own forms determining the properties of a territory. The growing tourist space

¹⁸ E. Gonda-Soroczyńska, *Innowacyjny klaster Zdrowie i Turystyka elementem współpracy na rzecz rozwoju turystyki uzdrowiskowej w województwie świętokrzyskim*, Prace Naukowe UE nr 157, Wydawnictwo Uniwersytetu Ekonomicznego we Wrocławiu, Wrocław 2011, pp. 437–446; E. Gonda-Soroczyńska, *Niewykorzystany potencjał uzdrowiska wiejskiego*, „Acta Scientiarum Polonorum” 2011, nr 10 (2), Architectura, pp. 25–34.

- including curative tourism space – in the studied towns, is a source of new meanings and values within rural culture.
4. There are delineated protection zones in the spa (including the rural spa). Their area allows for the introduction of new sanatorium structures and curative facilities. The protection of spa resources in these zones has a significant impact on the economic and aesthetic dimension of the spa's functioning.
 5. Rural towns with a large potential for development in the area of agritourism should utilise it to the highest possible degree. It is also favourable to introduce new curative and recreational centres in their close vicinity and to utilise the existing reserves of manpower resulting from unemployment for the purpose of tourism management.
 6. Some factors inhibiting the possibilities for development for rural spa centres include: an underdeveloped technical infrastructure, especially in respect to the water and wastewater management; the bad condition of local and district roads; an underdeveloped social infrastructure, especially with regard to culture, sports and recreation; the lack of strong service centres available to the customers and for tourism management; the insufficient level of managing the existing tourist routes.

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UZDROWISKOWA FUNKCJA WSI – INFRASTRUKTURA, ZASOBY PRZYRODNICZE, TWORZYWA UZDROWISKOWE

SŁOWA KLUCZOWE

spa, dominującą funkcją wsi, funkcja uzdrowiskowa

STRESZCZENIE

Celem podjętych badań jest analiza wybranych wiejskich ośrodków uzdrowiskowych w kontekście uwarunkowań przyrodniczych, oferty leczniczej i infrastrukturalnych uzdrowiskowej, stanowiących potencjał uzdrowiskowy, decydujący zarazem o jakości świadczonych usług turystycznych. Przedmiot badań obejmuje dwie wsie dolnośląskie: Przerzeczyn-Zdrój, Długopole-Zdrój i jedną osadę z woj. świętokrzyskiego – Solec-Zdrój. Jak to jest w przypadku wysoko rozwiniętych państw, również polska wieś nie jest już zamieszkała wyłącznie przez rolników. Współczesna wieś może spełniać różne funkcje. Znaczna liczba mieszkańców wsi zarabia na życie wykonując prace w działach pozarolniczych, często pracę poza ich miejscem zamieszkania. Jedną z funkcji pozarolniczej wsi, jest funkcja uzdrowiskowa, charakterystyczna dla miejscowości posiadających potencjał leczniczy, zwłaszcza w kontekście warunków środowiskowych (występowanie leczniczych wód mineralnych, sprzyjający klimat), jak również warunków infrastrukturalnych.

THE ANALYSIS OF THE TOURISM PROMOTION SYSTEM IN POLAND AS COMPARED TO THE FRENCH MODEL OF “INSTITUTIONAL PROMOTION”

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KEYWORDS | tourism promotion system, institutional promotion, National Tourism Organization, effectiveness of promotion

ABSTRACT | This article analyses the Polish tourism promotion system as compared to the French solution, which is a model solution according to the author, one that is based on the so-called “institutional promotion”. A decision has been made to compare these systems of tourism promotion for two reasons. Firstly, both systems of tourism promotion are based on a significant number of institutions that function both on the local level and on the regional level, ones that cooperate at the same time with the National Tourism Organization. Secondly, in spite of the potentially evident similarities, the analyzed systems of promotion exhibit many divergent features, which, consequently has an effect on the size and structure of the incoming tourist traffic. The following research thesis has been assumed: an effective tourism promotion system must be based on the mutual cooperation of all the institutions that are involved in promotional activities. This concerns those entities that function on all the levels of administration (local, regional and national).

Introduction

The main purpose of this article is to compare the tourism promotion systems in Poland and France. In spite of the seemingly substantial similarities (concerning in particular the use of the existing administrative structure for promotion: three levels of government administration), the analysed promotion systems demonstrate numerous distinct properties decisive as regards their effectiveness, and, consequently, size and structure of the incoming tourist traffic. The article

demonstrates that it is not the number of the entities and institutions responsible for promotion that decides about the effectiveness of the promotion system; it is their mutual cooperation (not competition!) based, among others, on the efficiently functioning tourist information system, managerial personnel that is professionally prepared to attend to tourists and to undertake joint initiatives, also those relating to the public and private partnerships and aimed at an increase of the level of the tourist- and investment attraction.

Tourism promotion system in Poland

Two institutions, i.e. the National Tourism Organization (NTO) and the National Tourism Administration (NTA) are the main entities responsible for the functioning of the Polish tourism. The Polish Tourism Organization performs NTO's function in Poland, while the Ministry of Sports and Tourism performs NTA's function.

The National Tourism Organization (NTO) is a national tourism policy entity of the public and private (government and local-government) nature. It can be financed both with public and private funds. The most important objectives of the NTO include the following:

- formulation and implementation of marketing campaigns,
- international promotional activities,
- managing the promotional activities of foreign departments,
- drawing up and production of promotional publications,
- acting as a "link of cooperation" between the government and the private sector.¹

The National Tourism Administration (NTA) is a national tourism policy entity of the governmental nature financed with public funds. The most important objectives of this type institutions include the following:

- coordination of the tourism development,
- formulation of the national tourism policy,
- international affairs in the area of tourism,
- tourist consultancy,
- crisis management,
- tourism investments,
- "filling in the gaps" left by the private sector.

The above mentioned types of institutions realize joint tasks as well. These include the following:

- licensing tourism activities,
- taking care of appropriate legal regulations,
- organization of trainings within the framework of the so-called tourism education,
- development of the tourism product,

¹ J. Borzyszkowski, *Polityka turystyczna państwa*, Politechnika Koszalińska, Koszalin 2005, p. 29.

- tourism market research,
- tourism statistics.²

The above presented objectives of both types of institutions explicitly indicate the fact that the National Tourism Organization, whose objectives are realized by the *Polish Tourism Organization*, is the main entity responsible for the promotion of Poland abroad. However, according to the principles of the Act on *Polish Tourism Organization*³, regional tourism organizations and local tourism organizations are supposed to be responsible for tourism promotion on the state's territory.

Functioning of the Polish Tourism Organization

The draft of the national tourism organization act in Poland was prepared in the year 1998. In the same year, it was passed to the first parliamentary reading. After some minor amendments, on 25 June 1999, the *Polish Tourism Organization Act* was finally adopted. The Act came into effect on 1 January 2000. From the perspective of the NTO's history, it needs to be mentioned that its formulation in Poland was significantly delayed. Out of all the national tourism organizations in Europe, the Polish institution was the last one to be established. Previously, NTOs were established not only in states with highly developed tourism economy (e.g. Italy, France) but also in former communist states (including the Czech Republic, Slovakia and Hungary).⁴

The objectives and targets defined in the Act are achieved by the *Polish Tourism Organization* in particular through the following:

- preparation and publication of promotional materials, organization of national stands at tourism fairs, exhibitions, shows, congresses and seminars, and also popularization of knowledge about Poland as a country that is attractive to tourists, in particular through the *Polish Tourist Information Centres*,
- carrying out statistical and marketing analyses, expert opinions and prognostic studies in the area of tourism,
- initiating and offering organizational support to activities undertaken by competent government administration authorities and state organizational entities, local-government entities and organizations for entrepreneurs in the area of tourism for tourist infrastructure development and modernization as regards an improvement of the quality of tourist services, development of tourism products and their promotion,
- ensuring functioning and development of the Polish tourist information system at home and abroad, as well as support for work aimed at the creation and development of the booking system of tourist services,
- expressing opinions in relation to those plans, strategic from the perspective of the interests of Poland that are prepared by the minister for tourism, local-government entities and organizations for entrepreneurs in the area of tourism,

² J. Borzyszkowski, op.cit., p. 31.

³ Act of 25 June 1999 concerning Polish Tourism Organization, "Journal of Laws" No. 62, Item. 689.

⁴ J. Borzyszkowski, op.cit. p. 49.

- initiation and issuing of opinions concerning plans and long-term programmes of promotion, development and modernization of the tourist infrastructure, especially as regards an improvement of the quality of tourist services and development of tourism products,
- cooperation with regional and local tourism organizations.⁵

To a great extent, the tourism image of Poland abroad is created by Polish tourist information centres. They are established in countries which are very important and prospective for the tourism influx into Poland. At present, the Polish Tourism Organization possesses 14 such centres, out of which 12 are located in Europe, one in New York, USA, and one in Tokyo, Japan. The European centres cover 17 countries with their activities, out of which 14 are European Union member states. The offices of Polish Tourist Information Centres are currently located in Austria, Belgium, France, Spain, the Netherlands, Germany, Russia, Sweden, Hungary, Great Britain, Italy and Ukraine. Also, in the year 2010, the Polish Tourism Organization conducted intensive promotional and informational activities in India and China.⁶

The Polish tourist information centres are formed in order to realize the statutory objectives of the Polish Tourism Organization in the areas of their operations. However, their presence on a given market facilitates the collection of information concerning trips from a given country, an analysis of data obtained from various sources. It allows one to directly and permanently contact mass media and the representatives of the industry, as well as to contact those consumers who are planning a visit to Poland and are asking for information and materials. The information and knowledge collected by the centres, impossible to be obtained without their work, forms the basis for the creation of plans and strategies of the Polish Tourism Organization.

Owing to the cooperation with foreign posts of the Ministry of Foreign Affairs, the long-standing presence on the market, good knowledge of the realities as well as the culture and traditions of a given country, the personnel of foreign centres of the Polish Tourism Organization can predict in an exceptionally effective manner tendencies and trends in tourism and, following this, they form an image of Poland. This allows a coherent and effective promotion of Poland both in Europe and all over the world. Consequently, Poland is becoming an increasingly popular destination for tourists from all over the world.

The organization of study trips for Polish and foreign journalists and educational trips for tour operators constitutes an important activity area of the Polish Tourism Organization. The purpose of those trips is presenting the most valuable sites in Poland in an appealing and convincing manner. Numerous articles about Poland that appear in reputed consumer and professional journals crop up later as a result of these trips. Educational trips for tour operators bear fruit in the form of new offers of trips to Poland in individual countries.

⁵ Ordinance by the Minister of Economy dated 28 April 2006 on granting the statute for the Polish Tourism Organization, amended with the Ordinance by the Minister of Economy dated 1 June 2007 on granting the statute for the Polish Tourism Organization.

⁶ The analysis of foreign markets 2010 based on reports from Polish Tourist Information Centres + China and India, Warsaw 2011.

The preparation of promotional publications about Poland is an equally important part of the activities of the Polish Tourism Organization. The brochures of the Polish Tourism Organization are published in 12 languages. Their subject matter covers all the issues of interest to the potential tourist, from *UNESCO* monuments, the historic values of individual towns and regions, active business and spa tourism, to Polish traditions and cuisine. Publications by the Polish Tourism Organization, owing to their characteristic layout and interesting topics, are recognizable and considered to be one of the best in the world. Additionally, the Polish Tourism Organization offers support to the publishing activities of regions by subsidizing the most interesting brochures issued by regional tourist organizations.

The operations of the *Convention Bureau of Poland*, responsible for the promotion of Poland as an attractive destination for the organization of meetings and business events, are dynamically developing. This is the first contact for those seeking the information on their prospective business partners and conference facilities, or for whomever is planning to organize a congress or a corporate event in Poland.

Within the framework of promotional activities at home, the *Polish Tourism Organization* closely cooperates with local governments, institutions of culture, tourism industry as well as regional and local tourism organizations. They constitute a forum for cooperation between local governments, professional industry organizations and economic entities that operate in tourism. Their objectives are: the coordination of promotional activities in the province or commune and the district, the creation of an attractive image of the region and the stimulation of the creation and development of tourism products. At present, all Polish provinces have their regional tourism organizations established as well as several to a dozen or so local tourism organizations. Owing to the cooperation with those entities, it is possible to combine invention and promotional activities on the local level with the promotional strategy and funds of the Polish Tourism Organization.

Numerous events that promote regions, towns and individual local tourism products among national and foreign tourists constitute the effect of this cooperation. Stands at fairs, competitions, seminars and conferences are also among these jointly organized events. All of them aim at the popularization of Poland, and they also contribute to an increased awareness of tourism: its positive influence on the state's economy, such as, for example, an increase in the number of workplaces.

The *Polish Tourism Organization* also manages the Internet *tourist information system*. In the future, this system aims at becoming a national database of the information about all those entities that operate in tourism industry (including hotels, accommodation facilities, restaurants, conference facilities, travel agencies, tour operators, organizations and tourist associations etc.).

Operations of regional tourism organizations

As mentioned previously, regional tourism organizations constitute the forum of cooperation between the local government on the provincial level and professional industry organizations as well as economic entities that operate in tourism in the area of the promotion of the area covered by the activities of such organizations as an attractive tourist region at home and abroad. As a rule,

regional tourism organizations function in the form of associations. At present, there are 16 regional tourism organizations that are active in Poland.⁷

Based on Art. 4.3. of the *Polish Tourism Organization Act* (as amended), the requirements of the *Polish Tourism Organization* as well as the guidelines related to the creation of a three-level system of tourism promotion in Poland (that has been under construction since the year 2000), the most important objectives of regional tourism organizations include the following:

- coordination of promotional activities in the province,
- formation of a regional tourist information system: to provide comprehensive information about the province based on local tourist information centres and an inclusion of the tourist information system in national solutions,
- promotion of the region's tourist values at home and abroad,
- stimulation of the creation and development of the tourism product in the region (ensuring a high quality of the tourism product, one which is able to compete internationally),
- initiation, provision of opinions and support of the plans of tourist infrastructure development and modernization,
- offering inspiration and aid with the formation of Local Tourism Organizations in the region,
- training of personnel for the needs of tourism,
- research and marketing analyzes in the area of tourism.⁸

Functioning of local tourism organizations

Local tourism organizations, similarly to regional tourism organizations, constitute the forum of cooperation between the local government (especially the local government on the district and communal levels) and the local tourism industry (being widely understood due to the heterogenic nature of tourism economy) with regard to the tourism promotion of the area covered by the operations of this organization and, in particular, the creation (forming, promotion and development) of local tourism products. Local tourism organizations function in the form of associations. Currently, there are 125 local tourism organizations in Poland.

The most important objectives of local tourism organizations include the following:

- integration of the local community, mainly local government entities and tourism industry,
- creation of the tourism product (formation, development and promotion) in connection with local tourist attractions,
- collection and updating of information about tourist attractions and products,
- maintaining and running local tourist information centres.

⁷ The Lower Silesian Tourism Organization, Kuyavia-Pomerania Tourism Organization, Lublin Regional Tourism Organization, Lubusz Regional Tourism Organization, Little Poland Tourism Organization, Mazovia Regional Tourism Organization, Opole Regional Tourism Organization, Podkarpacie Regional Tourism Organization, Podlasie Regional Tourism Organization, Pomerania Regional Tourism Organization, Regional Tourism Organization of the Łódź Province, Regional Tourism Organization of the Świętokrzyskie Province, Silesian Tourism Organization, Warmia-Mazovia Regional Tourism Organization, Great Poland Tourism Organization, West Pomeranian Regional Tourism Organization.

⁸ The Polish Tourism Organization, www.pot.gov.pl.

To sum up, the tourism promotion system in Poland is of an institutional nature. Apart from the institutions appointed with the aim of the realization of objectives directly associated with the promotion of tourism (including the *Polish Tourism Organization*, regional tourism organizations, local tourism organizations), many other institutions (including local governments and those representatives of tourism industry that are members of regional and local tourist organizations) undertake initiatives of this type. This causes a significant dispersion of promotional activities. Therefore, the view maintained by A. Szwichenberg, namely, that the tourism promotion must possess a professional character, seems to be correct.⁹ Local governments, while following the examples of many successful promotional campaigns in the world, should use the services of specialized marketing companies. At present, these activities are of a non-cohesive nature. "Everybody" (including Marshal's Offices, District Authority Offices, communes, tourism industry, local tourism organizations, associations, unions etc.) deal with these activities. Specialized companies should use the individual experience of institutions and organizations, part of which can boast of considerable achievements in this area. However, it should be emphasized that campaigns of this type are very expensive.

The situation presented above means that promotional activities in Poland are realized by too many institutions. To a significant extent, this causes their dispersion and duplication. Therefore, Polish tourism promotion can be referred to as "institutional promotion", yet in a negative context. Due to the lack of coordinated activities, very frequently the realized promotion does not bring about the expected results. This is true both of activities undertaken in the spatial dimension (settlement units, communes, regions etc.) and in the institutional dimension (local governments, tourist companies, organizations etc.).

It needs to be emphasized, however, that, according to the *Polish Tourism Organization*, this situation is undergoing a gradual change. The coordinated cooperation between entities involved in the promotion of Poland abroad and the formation of the tourism management system in Poland is gaining in significance for the implementation of individual objectives by the *Polish Tourism Organization*. The result of this cooperation is the added value generated from the synergy of activities and their increased effectiveness. The partners of the *Polish Tourism Organizations* at home include regional tourism organizations and local tourism organizations, local government entities and their partners as well as those entities that represent tourism industry, including the following: economic local governments, tourism industry organizations, the *Forum of Incoming Tourism*, the *Forum of Tourist Information*, the *Forum of Cities*, the *Union of Rural Communes*, the *Union of Provinces*, the *Association of Polish Skiing and Tourist Stations*, the *Association of Underground Tourist Routes in Poland*, the *Union of Sea Communes and Towns*, *Municipal Convention Bureaux*, the *Association of Congresses and Conferences in Poland* as well as industry associations in the area of business tourism and *Product Consortiums*.¹⁰

⁹ A. Szwichenberg, *Gospodarka turystyczna polskiego wybrzeża*, Monografia Wydziału Ekonomii i Zarządzania nr 121, Politechnika Koszalińska, Koszalin 2006, p. 174.

¹⁰ *Plan działania na lata 2012–2013*, Polska Organizacja Turystyczna, Warszawa 2012, p. 53.

Analysis of the tourism promotion system in France

The institutionalism of the use of tourism promotion may nevertheless be of a positive nature. The so-called institutional tourism promotion system in France is an example of a model tourism promotion system, one which has been excellently functioning for many years now.¹¹ A transfer of such a model to the realities of our state could bring only benefits to the Polish tourism. The fact that France held the first position in the world tourist ranking for many years as regards the number of tourist arrivals serves to demonstrate its effectiveness. For example, in 2012, France was visited by 83 millions of tourists, which accounted for c.a. 8.1% of all tourist arrivals in the world.¹² The reasons of such a great success are to be sought in the tourism promotion system that has been efficiently functioning for over 30 years now.

In the economy of France, tourism is of an essential significance. It constitutes one of the most important developmental branches. This is also reflected in the considerably extended administrative structures of the entities responsible for the form of the French tourism.

In France, in 1982, an administrative reform had been implemented. Apart from the existing departments and communes, the third level of territorial community: the region, was introduced. Competences were assigned to the state, regions, departments and communes with regard to tourism and the objectives that followed from these competences were realized in close cooperation and in a coordinated manner. Promotional activities in France are now based on all of the above mentioned levels of administration. As mentioned previously, this is referred to as “institutional promotion.” However, in contrast to Poland, every French town, department or region perceives a significant source of income in tourism. Therefore, they are very willing to cooperate with the aim of developing tourism. All the levels of administration have corresponding structures of tourism promotion.

Considering its structure (the administrative criterion), the tourism promotion system in France does not considerably differ from the one that is currently functioning in Poland (cf. Table 1). However, it should be emphasized that this concerns only those structures of tourism organizations (the Polish Tourism Organization, Regional Tourism Organizations and Local Tourism Organizations) that exist in Poland, i.e. only part of those entities that undertake promotional activities in tourism. The actual promotional activity looks different, however.

Two institution types, i.e. tourist offices (*Office de Tourisme*) and initiative syndicates (*Syndicat d' Initiative*) function on the lowest state administration level in France. They work in close cooperation with commune administrations. They generally pursue the same objectives. The difference in their names is related only to their sizes. Tourist offices are categorized in the four-star range depending on their sizes and effects achieved, opening times within the year and the level of services provided etc.

¹¹ J. Sikorska, *System promocji turystyki we Francji*, „Rynek Turystyczny” 1994, No. 8, p. 16.

¹² Tourism Highlights 2013 Edition, World Tourism Organization, Madrid 2013.

Table 1. Systems of tourism promotion in France and in Poland according to the administrative criterion

No.	Institutions responsible for tourism promotion on the individual levels of administration			
	France		Poland	
1.	State	ATOUT FRANCE French Agency of Tourism Development	State	National Tourism Organization – Polish Tourism Organization
2.	Region	regional tourism committees	Province	regional tourism organizations
3.	Department	departmental tourism committees	District	local tourism organizations
4.	Commune	– tourist offices – initiative syndicates	Commune	local tourism organizations

Source: M. Marczak, M. Boguszewicz-Kreft, *Promocja usług*, CeDeWu, Warszawa 2015, p. 141.

The main objectives of tourist offices and initiative syndicates include tourist services and tourist information, development of tourism products, promotion of destinations, operation of tourist facilities, organization of leisure activities and special events, coordination of the operations of various entities aimed at the development of local tourism.

Tourist offices and initiative syndicates are completely professional and are managed in the same way as real companies. In their organizational structure, there is a growing importance of staffing of positions connected with marketing and with promotion in particular. Hostesses, guides, promotion specialists and administrative personnel are hired. The directors of these offices mainly possess high qualifications in the area of tourism, management and economics. The statute of these institutions does not allow any profit-oriented business activity. Their profits are derived from three principal sources: member contributions (hotel owners, restaurant owners etc.), subsidies granted by communes and other institutions (chambers of commerce, savings banks), sale of postcards, posters, regional promotional materials, organization of guided tours etc.

The so-called departmental committees of tourism (*Comite Departementale de Tourisme*) operate on the level of the French department. They cooperate with general councils. It needs to be emphasized that out of 100 French departments, 98 departmental committees of tourism have been functioning since as early as 1960s! This is an intermediate level between the communal office or the initiative syndicate and the regional committee of tourism. They are financed with the budget of the general (departmental) council. Their legal status is the same as the status of tourist offices that operate on the commune's level. Departmental committees of tourism that operate in one region are in close cooperation with each other. The majority of them employ from 6 to 7 persons. To work for them, one needs to possess a diploma in the area of tourism, i.e. BTS (*Brevet de Technicien Supérieur*) – an equivalent of the Polish diploma of a post-graduate school or a secondary school of hotel administration.

The regional committees of tourism deal with promotion on the regional level. They cooperate with the councils of regions. As in the case of tourist offices, initiative syndicates or departmental committees of tourism, their size depends on the nature of tourism in a particular area and the region's rank. The average number of personnel in regional committees of tourism is c.a. 8–9. Regional committees of tourism are financed by regional councils. Regardless of the size, the activity of each regional committee of tourism covers the same forms of activity, i.e.:

- publication of brochures and other promotional materials,
- economic and commercial analyses of regional tourism products,
- consultancy in the area of education and professional in-service training in the region.

The education areas of their personnel involve various fields including tourism, arts history, management, economics, geography and spatial planning. Many of those employed by regional committees of tourism possess second- and third degree university diplomas (Bachelor or Master's degree). Regional committees of tourism have been members of the national federation of regional committees of tourism since 1987.

All of the above mentioned entities operating on communal, departmental and regional levels cooperated with *Maison de la France* (MDLF) established in 1987. This organization functioned within the structure of the ministry of tourism affairs, and its main objective was the tourism promotion of France, chiefly abroad. *Maison de la France* was an example of a significant participation of the private sector in tourism. For example, the share of private funds in financing the promotional budget of this National Tourism Organization in the year 1987 was 28.00%, while in 1997 it amounted to 51.00%. In the same period, public funds allocated for the operations of *Maison de la France* increased by 14.30%, while private funds – by 200.00%. In the same year, the distribution of the financing sources of *Maison de la France* was as follows: the state budget: 46.00%, the private sector: 54.00%.

In 2009, *Maison de la France* evolved into *ATOOUT FRANCE*, i.e. the French Agency of Tourism Development (formed as a result of the merger of *Maison de la France* and *ODIT France*, i.e. an agency that dealt with tourism engineering in France, tourism development, analyzes, classification and standardization). The competencies of the new agency cover the functions previously performed by *Maison de la France* and *ODIT France*, i.e. supervision over the quality of tourist services in the country and the promotion of destinations outside of the borders of France. Apart from this, on the international arena, the sphere was developed of analyzes, studies and trainings addressed to the foreign representatives of tourism industry.¹³ *ATOOUT FRANCE* functions on the basis of public and private partnership. This cooperation has been successfully practiced in France by these agencies since 1980s.

Referring to the tourism promotion system in Poland, one may attempt at making a comparison between the two institutional national tourism promotion systems (cf. Table 2).

The conducted analysis has demonstrated significant differences in the approaches to the issues of the promotion of tourist services in both countries. They concern chiefly the following:

- cooperation of local governments with the private sector (especially financing of promotion budgets),
- coordination of activities undertaken and involvement in the promotional process,
- appropriately selected and qualified personnel responsible for the realization of promotional activities.

¹³ ATOOUT FRANCE: www.atout-france.fr.

Table 2. Comparison of tourism promotion systems in Poland and in France

No.	Properties of tourism promotion system	
	France	Poland
1.	Transparent structure of institutions responsible for tourism promotion both at home and abroad	Promotion conducted by too many institutions. This causes a dispersion of activities and consequently, there are no expected results
2.	Close cooperation of local governments with tourism industry (significant share of private sector in the financing of promotional activities)	Limited cooperation between the local-government entities and the private sector (especially as regards the co-financing of promotional budgets)
3.	Cohesion and coordination of undertakings in the area of tourism promotion	No coordination, overlapping of promotional activities by the various entities associated with tourism
4.	Entities responsible for tourism promotion are managed in the same manner as professional tourism companies	Frequently, entities that serve other purposes (e.g. various tourism unions and associations) deal with tourism promotion
5.	Requirement of hiring highly qualified personnel to deal with tourism promotion (e.g. diplomas in the area of tourism, management, marketing and economics are required)	No appropriately prepared and qualified personnel to be in charge of promotion
6.	Appropriate numbers of those who deal with tourism marketing (including promotion) on individual administrative levels (e.g. departmental committees of tourism: an average of 6–7 people; regional committees of tourism: an average of 8–9 people)	Low numbers of those who directly deal with tourism (including tourism promotion) in local government entities
7.	Close cooperation between entities that deal with promotion on all the administrative levels and cooperation with ATOUT FRANCE	Competition, no cooperation or exchange of experience in the scope of tourism promotion on the individual levels of local government administration

Source: M. Marczak, M. Boguszewicz-Kreft, *Promocja usług*, CeDeWu, Warszawa 2015, p. 144.

Conclusions

The analysis presented in the article has demonstrated significant differences in the functioning of tourism promotion systems in Poland and France. In spite of many similarities concerning, in particular, the structure of both systems – which is closely related to the administrative system of both states as well as the institutional nature of promotion realized – many distinct features can be observed that have an impact on the effectiveness of promotional activities. It should be emphasized that these dissimilarities are determined by many factors, including the fact that the tourism promotion system in France has been functioning in a similar form for over 30 years now. This has allowed for the effective mechanisms of cooperation to develop between institutions responsible for tourism promotion on different levels of administration. Many economic initiatives undertaken in the French tourism sector have been realized based on the public and private partnership. To a significant extent, this strengthened the degree of confidence between the partners. The mentality needs to be emphasized of the representatives of French local government authorities, which is manifested in the perception of tourism as one of the chief economic functions in the context of many towns and regions. Furthermore, professional preparation of the personnel that attends to the tourist is of a great importance in France.

In the present article, attempts have been made to demonstrate that it is not the number of entities and institutions which are responsible for promotion that translates into the effectiveness of the promotion system but their mutual relations, level of confidence and multifaceted cooperation (and not competition!) that is undertaken with the aim of the development of the tourism function. It is the author's opinion that these properties are not characteristic of the Polish tourism promotion system as it is based to a significant degree on activities undertaken by too many entities and institutions. Their activities are very frequently dispersed, non-cohesive, they are not systematic and they are inconsistent. In spite of considerable funds allocated for promotion, there are no expected results in the form of a significant growth of the incoming tourist traffic.

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ANALIZA SYSTEMU PROMOCJI TURYSTYKI W POLSCE NA TLE FRANCUSKIEGO MODELU „PROMOCJI INSTYTUCJONALNEJ”

SŁOWA KLUCZOWE

system promocji turystyki, promocja instytucjonalna, Narodowa Organizacja Turystyczna, skuteczność promocji

STRESZCZENIE

W artykule zaprezentowano analizę polskiego systemu promocji turystyki na tle modelowego według autora, rozwiązania francuskiego, opartego na tzw. „promocji instytucjonalnej”. Zdecydowano się na dokonanie porównania tych systemów promocji turystyki z dwóch powodów. Po pierwsze, obydwa systemy promocji turystyki oparto na znacznej liczbie instytucji funkcjonujących zarówno na szczeblu lokalnym, jak i regionalnym, jednocześnie współpracujących z Narodową Organizacją Turystyczną. Po drugie, mimo potencjalnie widocznych podobieństw, analizowane systemy promocji wykazują wiele cech odmiennych, które w konsekwencji rzutują na wielkość i strukturę przyjazdowego ruchu turystycznego. W artykule przyjęto następującą tezę badawczą, iż skuteczny system promocji turystyki musi być oparty na wzajemnej współpracy wszystkich instytucji zaangażowanych w działania promocyjne. Dotyczy to podmiotów funkcjonujących na wszystkich szczeblach administracji (lokalny, regionalny, krajowy).

THE FINANCING NEEDS OF AGRITOURISM FARMS IN THE ŚWIĘTOKRZYSKIE PROVINCE*

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KEYWORDS | agritourism activity, rural areas, development barriers, financing

ABSTRACT | This study aims at assessing the financing needs of agritourism farms in the Świętokrzyskie Province. Since agritourism in Poland has been growing in a dynamic way for over a decade, it became an important component of the tourist offer. This part of tourism is largely dependent on financing capacities of agritourism farms. This study presents the results of the empirical survey carried out in the agritourism farms located in the selected gminas of the Świętokrzyskie Province.

Introduction

Agritourism is part of countryside tourism closely associated with agricultural farms, that started to develop in Poland anew in the early 1990s. This type of tourism is rather

* The territory of the Republic of Poland is divided into *województwa* – ‘provinces’ which are composed of *powiaty* – ‘counties’. The smallest administrative units are *gminy* – ‘municipalities’ or ‘communes’.

limited.¹ Due to the huge interest in agritourism among the population, the number of farms with such offers in Poland is growing every year.² Poland (including the Świętokrzyskie Province) has a good potential for such a development. It mainly concerns the regions with the low industrialisation and urban development, high unemployment rate, low income of agricultural population with free accommodation capacities, all factors facilitating the delivery of tourist services.³

The reason why tourists visit agritourism farms is their active stay and participation in the life of the farmer and their families. Moreover, it is a good opportunity to discover similarities and differences in agricultural life and opportunity to stay in healthy rural areas. Agritourism is a leisure activity performed on rural areas based on accommodation capacities and activities associated with agricultural farms and their surroundings (e.g. natural environment, production or services).⁴

Agritourism generates an increasing income of agricultural farms on regular basis.⁵ Its growth creates additional job opportunities and chances to use existing accommodation facilities as well as own produce from these farms.⁶ Moreover, it facilitates the development of culture, infrastructure, environmental and landscape protection, which, for agritourism, become key elements of this product on the market.⁷ Many authors point out that agritourism brings profits both for farms and their visitors.

The main goal of this study is to identify the financial needs of agritourism farms in the Świętokrzyskie Province. Their operation is hindered by numerous development barriers. This study focuses mainly on the financial needs of agritourism farms. Satisfying those needs may weaken other barriers that prevent tourism from growing.

Empirical studies were conducted in 2013 with surveys in agritourism farms. They included the self-assessment of financial needs for such an activity. Purposive and random sampling were used. There were 170 agritourism farms selected for the study. These were farms with at least several years of experience and stable market position. After the correctness verification, 150 surveys were analysed with statistical and graphical interpretation.

¹ I. Janowski, *Agroturystyka i ekoturystyka – szansą odmiany oblicza świętokrzyskiej wsi*, in: *Wybrane problemy rozwoju regionalnego*, Prace Instytutu Geografii Akademii Świętokrzyskiej nr 11, Kielce 2004, pp. 63–77.

² J. Wojciechowska, *Procesy i uwarunkowania rozwoju agroturystyki w Polsce*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź 2009, p. 167.

³ U. Świetlikowska (ed.), *Agroturystyka*, Wydawnictwo Fundacji Programów Pomocy dla Rolnictwa FAPA, Warszawa 2000, p. 75.

⁴ M. Drzewiecki, *Podstawy agroturystyki*, Oficyna Wydawnicza Ośrodka Postępu Organizacyjnego, Bydgoszcz 2001, p. 112.

⁵ A. Jasińska, G.A. Ciepela, *Udział agroturystyki w tworzeniu dochodów gospodarstw rolnych*, in: *Konkurencyjność produktów turystycznych*, ed. M. Jalinik, Politechnika Białostocka, Białystok 2009, pp. 163–173.

⁶ M. Durydówka, *Czynniki rozwoju i zróżnicowanie funkcji turystycznej na obszarach wiejskich w Polsce*, Wydział Geografii i Studiów Regionalnych UW, Warszawa 2012, p. 121.

⁷ T. Dziechciarz, *Agroturystyka – nowa forma aktywności ekonomicznej ludności wiejskiej w Polsce*, in: *Studia nad turystyką. Prace ekonomiczne i społeczne*, eds. W. Kurek, R. Pawłusiński, Instytut Geografii i Gospodarki Przestrzennej Uniwersytetu Jagiellońskiego, Kraków 2007, pp. 76–84.

Main barriers to agritourism as described in the literature on the subject

The existence of agritourism farms in rural areas can be a source of financial profits for farmers as well as an additional income. However, running agritourism farms means that farmers have to overcome numerous barriers to the growth of these farms including the most significant: the insufficient financial means for investments and modernisation of farms, difficulties in selling various tourist products, insufficient marketing, and complicated, difficult to interpret legal regulations. In order to stimulate a dynamic growth of agritourism, farmers' own activities have to be backed by the financial support from the European Union and local authorities.

The growth of agritourism is hindered by several barriers.⁸ The most important include:

- insufficient financing of rural areas and the lack of capital for agritourism activities,
- underdevelopment of farms for agritourism purposes,
- psychological barriers within the population of rural areas, e.g. unwillingness to accommodate tourists,
- depopulation of rural areas,
- incomplete tourist offer in agritourism farms and their surrounding,
- poor spatial organisation and new real estate developments, unadjusted to the traditional architectural heritage,
- underdeveloped transportation system and poor tourist infrastructure,
- incoherent financing of government investments and incoherent subsidising of private investments in tourism,
- insufficient diversification of agritourism promotion and the region itself.

Moreover, within the majority of areas in Poland farmers are not willing to cooperate with each other.⁹ Yet another barrier to overcome is the lack of support from local authorities and insufficient coordination of activities related to agritourism between authorities of different levels.

Barriers to agritourism farms in the Świętokrzyskie Province according to the interviewees

Agritourism is an important, developing form of tourism in the Świętokrzyskie Province.¹⁰ Agritourism farms in this province have been operating since 1993. That type of entrepreneurship among the farmers originated mainly in the agricultural consultancy system. The number of agritourism farms is growing every year and agritourism products are supplemented and developed on regular basis. Over 60% of all agritourism farms are currently well-founded on the tourist market and their offer is not limited to mere accommodation and dining; more sophisticated offers are starting to be provided.

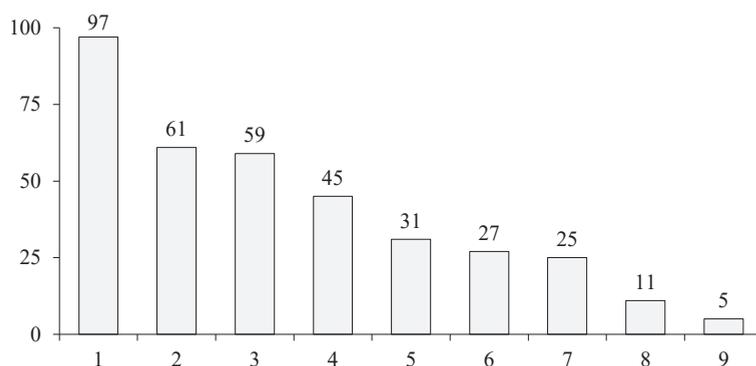
⁸ M. Sznajder, L. Przezbórska, *Agroturystyka*, PWE, Warszawa 2006, p. 257.

⁹ B. Sawicki, *Perspektywy rozwoju usług agroturystycznych w Polsce*, in: *Rozwój turystyki na obszarach wiejskich*, ed. M. Jalinik, Wydawnictwo Politechniki Białostockiej, Białystok 2007, pp. 12–25.

¹⁰ M. Wilk-Grzywna, *Działalność Regionalnej Organizacji Turystycznej Województwa Świętokrzyskiego (2002–2007)*, in: *Rozwój turystyki w warunkach Unii Europejskiej*, eds. W. Cabaj, J. Feczko, Wyższa Szkoła Ekonomii i Prawa, Kielce 2009, pp. 217–224.

Within the agritourism farms included in the survey, 25% have been on the market for 4–6 years. Over 10 year of experience in the business is a characteristic of 23% farms, whereas 7–10 year experience – of 21%. The agritourism farms with less than 3 years in the business constitute 17%. The significant 14% interviewees has not given the date of commencing their agritourism activities.

The surveyed agritourism farms offer mainly accommodation – 97%. Moreover, 59% of this group rent various equipment to their guests, while 61% offer meals for tourists. The least widespread practices are the distribution of souvenirs (11%) and education activities (25%).



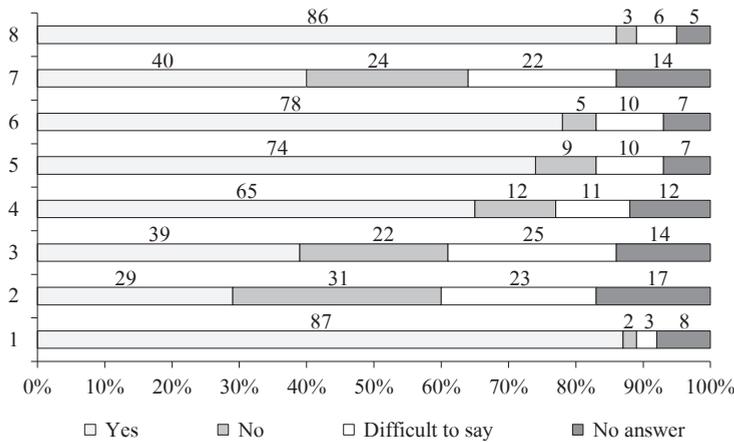
1 – Accommodation, 2 – meals for tourists, 3 – rental of various equipment, 4 – selling farm produce, 5 – guide services, 6 – organizing trips and events, 7 – educational activities, 8 – distribution of souvenirs, 9 – other.

Figure 1. Composition of offers in agritourism farms (%)

Source: own calculations based on field studies

Despite the favourable conditions for the agritourism growth in the Świętokrzyskie Province, farm owners face numerous difficulties in running their businesses.

The most significant obstacles preventing agritourism growth according to the interviewees include insufficient own capital (87%) and difficult application process for the EU funds (86%). Another barrier is the ambiguity of legal regulations concerning business accounting practices (74%) and meals for tourists (78%). The interviewees expect more support from local authorities (65%) and industry organisations (39%). The above mentioned barriers to agritourism are important according to the interviewees. A small percentage (29%) of the surveyed farmers point to their own insufficient knowledge both of tourists' expectations and running agritourism business (40%) (Figure 2).



1 – insufficient own capital, 2 – insufficient knowledge of tourists’ expectation, 3 – lack of support from industry organizations, 4 – lack of support from local authorities, 5 – ambiguity of legal regulations concerning business accounting practices, 6 – ambiguity of legal regulations concerning preparing meals for tourists, 7 – insufficient knowledge of running agritourism business, 8 – difficult application process for the EU funds.

Figure 2. Barriers to agritourism growth

Source: own calculations based on field studies.

Fundraising for agritourism

Setting up an agritourism business requires appropriate capital. Farmers’ own capital is the main source of financing various investments.¹¹ It has two forms: money (cash, securities, bank accounts) and property (buildings, machines, livestock, produce, etc.). The capital can come from diverse sources and thus be divided into internal and external, own and foreign.¹² The main source of the internal capital is the exchange of material assets into financial means. It includes – among others – profits from cash deals. Foreign capital may help farmers in setting up their agritourism businesses, but the way it is obtained is a huge problem. The financial support can assume manifold forms.¹³ The most frequently used include:

- credits with low interest rates from cooperative banks or foundations for agritourism development created by local authorities,
- budgetary funds from local authorities (communes) (e.g. for upgrading the systems of transportation, telecommunication, water supply and sewerage),

¹¹ M. Dębniwska, M. Tkaczuk, *Agroturystyka – koszty, ceny, efekty*, Poltext, Warszawa 1997, p. 181.

¹² H. Godlewska, *Polskie rolnictwo wobec integracji z UE*, in: *Obszary wiejskie w Polsce a integracja z Unia Europejską*, eds. C. Sobków, M. Zarębski, Wydawnictwo Adam Marszałek, Toruń 2002, pp. 82–95.

¹³ B. Bury (ed.), *Agroturystyka a problemy społeczne zatrudnienia*, Wydawnictwo i Zakład Poligrafii Instytutu Technologii Eksploatacji, Końskie–Radom 2002, pp. 41–52.

- budgetary funds from local authorities on the level of counties and provinces,
- funds from the European Union.

Poland joining the European Union opened significant financing possibilities for the Polish rural areas including agritourism. Poland uses the following three types of funds:

- pre-accession instruments, e.g. Phare, SAPARD, Leader,
- the EU initiatives, e.g. INTERREG, URBAN, EQUAL,
- structural funds, e.g. the European Regional Development Fund, the European Agriculture Guidance and Guarantee Funds, the European Social Fund, the Cohesion Fund.

Subsidies from EU funds for agritourism are transferred for investments in particular farms as well as agritourism communes.¹⁴ On the farm level these funds are coordinated both by centres of agricultural consultancy and the Polish Federation of Countryside Tourism „Gospodarstwa Gościnne” (Polska Federacja Turystyki Wiejskiej „Gospodarstwa Gościnne”).

The foundations supporting entrepreneurship in rural areas such as e.g. the Rural Development Foundation (Fundacja Wspomagania Wsi) or the Foundation for the Development of Polish Agriculture (Fundacja na Rzecz Rozwoju Polskiego Rolnictwa) play a significant role in the development of agritourism.

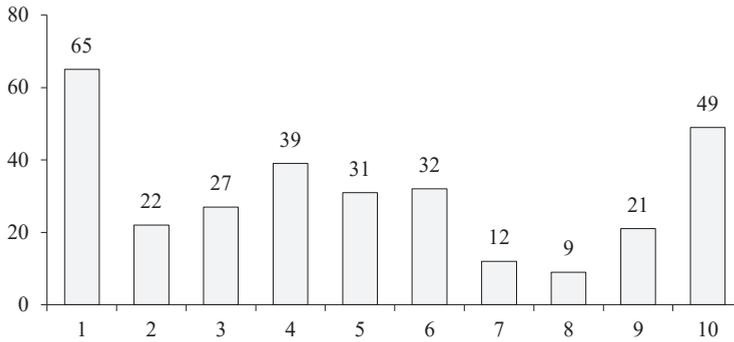
Apart from the preferential soft credits with low interest rates, agritourism farm owners can benefit from commercial credits on general terms. The interest of banks in financing agritourism with their credits is rather narrow, and there are no rules for granting credits for this business.¹⁵ Banks and investors underestimate the growth of agritourism in the general tourism. Therefore, financial support for agritourism in the Polish banking system requires organisational changes.

Main financial needs of agritourism farms in the Świętokrzyskie Province according to the surveyed interviewees

According to the farmers participating in the survey, financing is one of the most serious barriers to the growth of their agritourism businesses. Therefore, they pay attention to identifying needs of farm owners for investments and their financial outlays. The most important goals for the interviewees are modernisation of their dwellings (65%), promotion (49%), and purchasing sports and recreational equipment (39%). The farmers also want more support both for launching produce on the market (32%), expanding the offer of the services in question (31%) as well as developing agritourism facilities (27%) and their equipment (22%). Only 12% of the interviewees claim that there is a need for financing activities aimed at improving the quality of services offered, and 9% want to introduce the categories of agritourism facilities, an innovation which also requires financial outlays. Figure 3 presents the distribution of their answers.

¹⁴ I. Wierzbicka, *Rola samorządu województwa świętokrzyskiego w kreowaniu przedsiębiorczości turystycznej*, in: *Regionalne oraz lokalne czynniki i bariery rozwoju turystyki*, ed. E. Nowak, Wydawnictwo Uczelniane Wszechnicy Świętokrzyskiej, Kielce 2003, pp. 131–141.

¹⁵ E. Pałka, *Uwarunkowania i procesy rozwoju agroturystyki. Przykład województwa świętokrzyskiego*, Wydawnictwo Uniwersytetu Jana Kochanowskiego, Kielce 2015, p. 333.



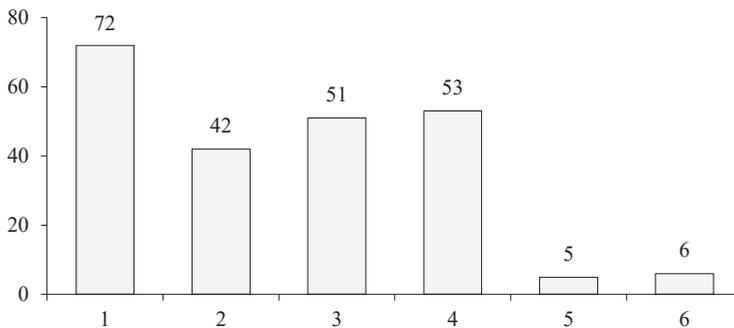
1 – modernization of their dwellings, 2 – development of farm equipment, 3 – developing agritourism facilities, 4 – purchasing sports and recreational equipment, 5 – expanding the offer of services, 6 – launching produce on the market, 7 – improving quality of services, 8 – introducing categories of agritourism facilities, 9 – training concerning agritourism business, 10 – promotion.

Figure 3. Agritourism financing needs (%)

Source: own calculations based on field studies.

The survey includes the investments scheduled in the development of agritourism farms within the incoming three year period (i.e. 2014–2016). The agritourism farmers have decided to take such steps to enhance their offer and improve quality of services.

For 72% of the interviewees it is necessary to renovate their dwellings, and 53% plan to invest in promotion and marketing. Other necessary investments for agritourism farm owners include the development of additional items in their offer or selling food. It is worth mentioning that up to 5% of the interviewees do not plan any investments in their farms in next three years.

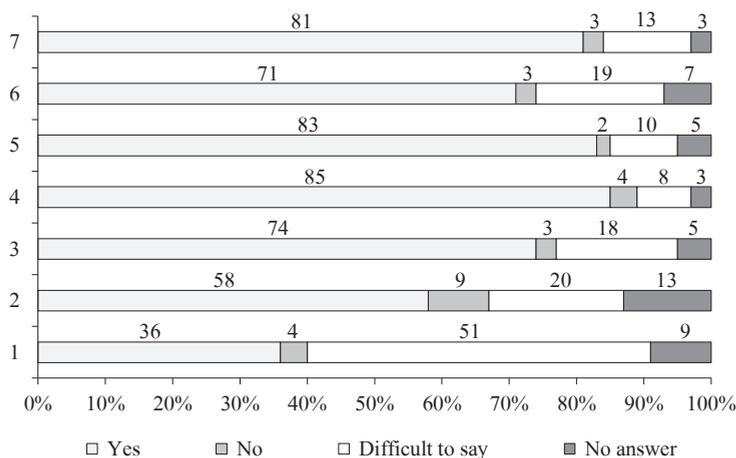


1 – necessary to renovate their dwellings, 2 – development of selling food, 3 – development of additional items in the offer, 4 – investing in promotion and marketing, 5 – no investments plans, 6 – other.

Figure 4. Investments in the development of agritourism farms scheduled for next three years

Source: own calculations based on field studies.

The owners of agritourism farms are willing to finance scheduled investments from their own resources (96%). Despite difficulties in obtaining the financial support from EU, up to 74% of the interviewees plan to apply for such aids. The interviewees also want to use bank loans (12%). As the main reason for their unwillingness to apply for EU funds, they usually point to the complicated application procedures, insufficient information on various financial resources, and inability to prepare application forms.



1 – cooperation with universities, 2 – knowledge of tourists' expectation, 3 – cooperation between agritourism farms, 4 – professional support and cooperation with centres of agricultural consultancy, 5 – professional support and cooperation with local authorities, 6 – professional training, 7 – broader knowledge on EU funds.

Figure 5. Factors facilitating external financing for the development of agritourism farm

Source: own calculations based on field studies.

The survey in question has also identified the factors that can – according to the farmers – increase their chances of obtaining some external financing for their agritourism farms. The most important factors comprised: the professional support and cooperation with centres of agricultural consultancy (85%), support and cooperation with local authorities (83%), broader knowledge of EU funds (81%). The farmers also emphasise the professional training (71%) and cooperation between agritourism farms (74%). The fewest interviewees (36%) considered the cooperation with universities as a possible factor facilitating external financing. Over half of them (51%) are not able to decide whether universities can help them receive financial support.

Conclusions

Agritourism can be an alternative for the farmers of the Świętokrzyskie Province (particularly from areas with the conditions unfavourable for agricultural development). Unfortunately, these are

often the poorest areas and their inhabitants do not possess financial means for adjusting their farms to the needs of potential tourists, sanitation improvement or enhancing their surrounding. Many agritourism farms from the Świętokrzyskie Province still offer an incomplete range of tourist services, e.g. accommodation only, without food or dining possibilities on farms, and few leisure activities. The agritourism in the Świętokrzyskie Province is also hindered by the depopulation of rural areas. Young, ambitious and industrious people migrate to urban areas in search for jobs and an easier life.

As the results of the survey show, the most significant barriers to the agritourism growth in the Świętokrzyskie Province are: the insufficient own capital, difficulties in obtaining an EU support, and complicated legal regulations concerning settling accounts and the sale of food on farms.

The greatest number of needs identified by the interviewees is concerns the financing of agritourism aimed at renovation of dwellings and promotion. Up to 95% of the participants of the survey are planning to develop their agritourism activities and invest in the renovation of their dwellings, promotion of their farms and expansion of their offer. Moreover, 74% of the farmers express the wish to apply for EU funds.

With the answers of the interviewees concerning the need for agritourism financing in mind, it is necessary to take additional steps. They include:

1. Seminars, symposia and meetings with local authorities, centres of agricultural consultancy, agritourism organisations focused on overcoming the difficulties in running agritourism businesses.
2. Close cooperation between the farmers and their local authorities.
3. Consultancy on the sources of agritourism financing and rules concerning application forms for subsidies.
4. Common steps taken by various institutions to promote social and economic development in the rural areas in question.
5. Educational programmes for farmers aimed at supplementing their knowledge on the rules of agritourism.

The Świętokrzyskie Province has environmental and cultural values aplenty as well as a good location. Owing too these facts, appropriate marketing activities can stimulate the constant growth of the demand for the agritourism product.

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POTRZEBY W ZAKRESIE FINANSOWANIA DZIAŁALNOŚCI GOSPODARSTW AGROTURYSTYCZNYCH NA PRZYKŁADZIE WOJEWÓDZTWA ŚWIĘTOKRZYSKIEGO

SŁOWA KLUCZOWE

działalność agroturystyczna, obszary wiejskie, bariery rozwoju, finansowanie

STRESZCZENIE

Niniejsza praca stanowi próbę oceny potrzeb w zakresie finansowania działalności gospodarstw agroturystycznych znajdujących się na obszarze województwa świętokrzyskiego. W ciągu ostatnich kilkunastu lat obserwuje się w Polsce dynamiczny rozwój agroturystyki. Dzięki temu stała się ona ważnym elementem oferty turystycznej. Rozwijanie tej formy turystyki jest uzależnione w znaczącym stopniu od możliwości finansowych w gospodarstwach agroturystycznych. Niniejsza praca prezentuje wyniki badań empirycznych przeprowadzonych w gospodarstwach agroturystycznych zlokalizowanych w wybranych gminach województwa świętokrzyskiego.

USING THE INTERNET IN THE DECISION MAKING PROCESS CONCERNING THE PURCHASE OF TOURIST OFFERS

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KEYWORDS | information society, e-tourist, purchase decisions

ABSTRACT

A more and more considerable factor that contributes to change is the continued development and dissemination of new information and communication technologies. Information and communication technology have led to considerable changes in people's communication, making it possible to disseminate information not only via traditional media platforms. Owing to Internet companies can create their own communication channels aimed directly at present and future customers. The paper aims at identifying the possibilities of using the Internet in the process of taking and realizing purchase decisions regarding tourist services. The paper is devoted to important transformations that tourism is subject to by promoting information and communication technology. The Internet and mobile technologies change both the media space and the way companies and consumers communicate.

Introduction

With new technologies constantly appearing there are changes to the labour market and the way in which social life is organised. There is an increasing number of digital goods and services which raise people's standard of living. The fact that it is easy to sell services online because of lower costs and the convenience of all those concerned causes such services to become some sort of threat to the same ones sold in a traditional way. At the start of the 21st century Internet researchers

created the vision of watching the entire world without leaving home. The rapid development of electronic technology allowed it to help advance tourism by putting the technology into practice. Such activities were largely dictated by tourists' rising awareness and expectations. In the literature it is difficult to find a reference to e-tourism, which is usually mentioned as a way of promoting the image of a tourist product, or, in more popular terms, selling tourist services via the Internet.

The constant information development and knowledge improvement gave rise to the term "information society" in Japanese social sciences in the 1960s (Karvalics, 2007). Numerous research definitions and approaches prove the complexity of the problem. In general, the most important message is *information* and *knowledge*. As noted by Cellary (2002), the term "information society" pays attention to the word *information*, although *knowledge* is more important when it comes to a human being, because it is indispensable for acquiring, understanding and creating information.

The information society is characterised by being prepared and able to make use of information systems. It is a computerised society that uses telecommunication services to transmit and process information remotely (the first Congress of Polish Information Technology, 1994). From a simpler definition that refers directly to the role of consumer it can be inferred that the term "information society" is used to describe a society in which individuals as consumers or employees make intensive use of information (Kubicek, 1999). Despite numerous definitions the most significant one is that by Goba-Klas and Sienkiewicz (1999), who employs the term to specify a society that has developed means of information processing and communication and the means are the basis for creating national income and the main source of livelihood for most of the society.

The notion of the information society as the main factor of social and economic progress is a fairly well-researched phenomenon. Work in the area was pioneered by Bell (1973), who the first to use the term "post-industrial society". The phrase referred to a society of services (earlier the idea of a production of goods society was recognised). To some degree the concept extended Machlup's term (1962), who was the first to use the phrase "information society". Several years later the significance of the social group was stressed by Drucker (1968) in his analysis of the post-capitalist society, which he also viewed as a knowledge-based society. All the previous research was the basis of Porat's work (1977), who studied the information economy and the information sector. However, at present the most up-to-date ideas seem to be those by Toffler (1980), who presented the concept of "the third wave" and identified an information-based post-industrial civilisation. An introduction to the discussion of the Internet being omnipresent in the social and economic life can be found in Castells (1998), who showed the correlation between the changes in the conditions and style of social life, a knowledge-based economy and the universality of computerisation.

Despite Poland's technological diversification being different from that in other European countries (Internet infrastructure and access is lower than the average in European countries¹), Internet users are more and more increasingly willing to search information about tourist products in the market. The Internet is becoming a more and more popular information source for prospective clients that plan both leisure and business trips.

¹ A. Tarkowski, *Analiza społecznych uwarunkowań dostępu do Internetu*, http://zds.kprm.gov.pl/sites/default/files/analiza_alek_tarkowski.pdf, 2009.

At the same time a network society, which is characterised by high internet usage, is provided with endless opportunities that stem from interactive access to all the goods offered by the world. First of all the access is changing us, the way we function and radically alters numerous branches that are key to society.

The aim of the paper is to identify the possibilities of using the Internet in the decision making process concerning the purchase of tourist services and to signal a new model of tourist: an e-tourist that has progressed from the previous e-consumer. The paper is both diagnostic and prognostic and describes how processes related to among other things Internet development will influence tourism development. As a consequence, there are also general recommendations for tourist companies which should be the most interested in communicating information to a new model of tourist, i.e. e-tourist. The work is a diagnostic overview and is primarily based on social structural diversification. Generally, one might be tempted to say that the structure to some extent corresponds to the development of a particular society and changes that have been taking place over the years that have contributed to the e-tourist emerging.

Using the Internet in tourism

The increasing use of smartphones and tablets has revolutionised the way and rate of communication with consumers, too. A contemporary customer is *homo informaticus* – he or she is apt at using technology and searching indispensable information in numerous sources. In order to reach him or her, it is worth using trends that have been appearing. Technological advance has also contributed to the rise of e-consumer. An e-consumer is a private individual that shows and meets his or her consumer needs through products (goods and services) purchased in the Internet. Defining the category of e-consumer makes it possible to identify the category of e-behaviours. Any individual's reactions to stimuli from the outside world – both real and virtual – can be regarded as e-behaviours. They may be passive (e.g. reading web pages, browsing the websites of companies providing services, auctions and online shops, using email) and active (e.g. posting comments, running a blog, using communicators, buying online, using online services, participating in Internet forums and virtual communities) (Figure 1) (Jaciow, Wolny, 2011).

The universality of the Internet contributes to the fact that consumers cease to be passive recipients of often one-sided advertising messages. They are more and more eager to consciously search for reliable and proven information based on opinions of their friends, families or other credible people from a stakeholder's point of view. Such a universality is not beneficial to consumers only. Companies, too, find it much easier to reach consumers in order to recognise their needs and ultimately sell their products. The development of the Internet is not limited to universal access to information. The access is becoming boundless as mobile devices are gaining in popularity, which as a consequence results in mobile Internet becoming increasingly widespread. This trend is visible all over the world and is mainly caused by us functioning in the so called nanosecond culture. Since consumers are in constant rush, dashing from one place to another, they expect everything to be available right here and right now (Hatalaska, 2011).

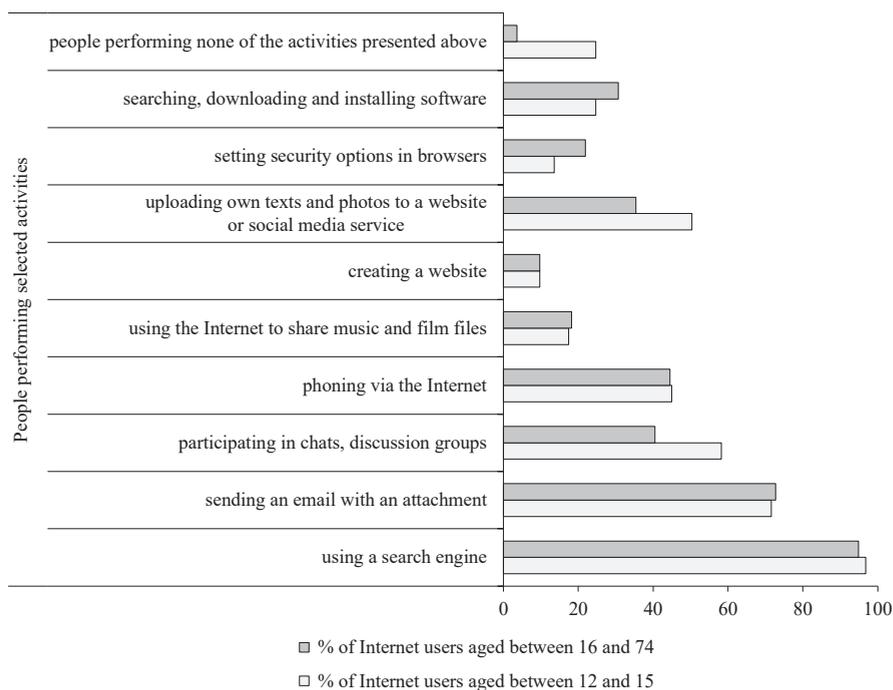


Figure 1. People using the Internet and performing various activities in 2014

Source: *Spoleczeństwo informacyjne w Polsce w 2014 roku*, GUS w Szczecinie, Warszawa 2014.

Many researchers believe that the most important factor that defines the frequency of Internet use is age. The biggest group (98.3%) that not only has access to the Internet, but also uses it actively comprises people aged between 16 and 24. The most important features that Internet activity in this demographic group depends on are mobility, a strong desire to learn about new things and, to a large extent, addiction to the Internet and mobile phones. A slightly smaller group of Internet users is comprised of people aged between 25 and 34 (90.8%) and those aged between 35 and 44 (79.5%). People aged 45 and more are using the Internet much less frequently. The proportion of active users aged between 45 and 54 amounts to only 57.9% whereas those aged 55 or more to an average of 27.1% (Kalecińska, 2013). The rapid development of the Internet has led to consumer C being differentiated from consumer L. The differentiation stems first of all from patterns of behaviour and not demographic features, as used to be the case. Although the current development of technology creates the same skills and needs as far as using the services in the Internet is concerned, the differentiation can be made based on certain features. Generation C is a generation that is willing to have influence and control over what appears in the Internet. The consumers create, comment and assess – they feel the need of becoming known in the virtual world. Generation L, in turn, is the one that distributes content which has already appeared in the Internet, e.g. through various social media (Driggs, 2012).

The Internet enables not only diminishing the impact of mass message, but also finding the best offers and comparing prices instantly thanks to the popularity of web browsers, forums and social media. Even if a customer makes a decision regarding a product or a service found on the Internet and he or she completes it in a traditional company, he or she already has a strictly defined plan as to the destination and the offered price. To date consumers' patterns of purchase decisions have been concentrated on three principal factors: advertising messages, direct contact with a product and possible subsequent experiences related to use of the product. When buying holidays consumers used to be influenced by fashion, their friends' and families' opinions, their habits and the need to experience something new in their choice of destination.

Purchase decisions are made depending on the users being active in the Internet. More and more often consumers have permanent access to new information that helps them take more reasonable buying decisions and react less spontaneously during the process, which confirms a higher degree of consumer awareness on their part. In addition, when features of information society are considered, the buyers do not keep the information to themselves, but share it with others, which impacts purchase decisions by other potential customers. Such opinions are often of greater value than a typical advertisement of products and services. According to Nielsen's report titled "Trust In Advertising" (Global Trust in Advertising, 2012), 90% of respondents take purchase decisions based on recommendations from people they know and as many as 70% make the same decision guided by information published online.

The technological advancement enables us to make a purchase in every moment of our lives, regardless of whether we are at home, at work or travelling. All information is within easy reach. The importance of decision making stems first of all from several facts:

- 62% of all buyers in the world are digital consumers. Buying online is gaining in significance even if most transactions are made traditionally,
- digital consumers can be divided into three groups according to their most frequent behaviours: digital informers, digital purchasers and digital multitaskers,
- multitaskers are the most informed, the most versatile and the most demanding consumers as to whom awareness needs to be raised, as there are more and more of them from year to year,
- Although digital technologies greatly enrich traditional forms of purchase and play a significant role in the buying process (even if it is completed in a stationary shop), consumers' purchase decisions are still largely influenced by recommendations from friends and second-hand opinions (whisper marketing) (Driggs, 2012).

Driggs (2012) defines digital consumers as people using the Internet during the purchase decision making process in at least 5 out of 10 main categories² of products and services. This means that these are people who search information about a product or a service in the Internet or buy directly from the Internet before they make a purchase online or offline. The biggest group

² 1 – Mobile and landline telephony, 2 – Consumer electronics, 3 – House insurance, 4 – Goods, 5 – Clothing, 6 – Health insurance, 7 – Consumer credit, 8 – Health protection, 9 – Food and drinks, 10 – Cars.

(63%) of digital consumers is made up of digital informers whose behaviours are characterised by the following major elements:

- they treat the online channel solely as a source of information,
- purchases are mainly made in traditional shops,
- consumers have greater loyalty towards a particular brand,
- they spend the least time online among members of the entire group of digital consumers.

The least numerous group is that of digital buyers - only 13% of the whole society. Their most important features include:

- they mainly use the Internet to make a purchase,
- the decision to buy is primarily influenced by product price and availability;
- a brand, ethics, social responsibility do not have much impact on buying decisions,
- they express a higher preference for credit card payments,
- they show a relatively high level of approval of mobile devices.

Digital multitaskers are included in the middle group, over which entrepreneurs may have potentially the biggest influence. This primarily stems from several facts:

- mixing offline and online channels both during a product or service and making a purchase,
- as a general rule the group comprises people with better education and higher income than those in the two previous consumer groups,
- a very low level of loyalty towards the brand,
- the greatest amount of time is spent on searching information about a product and recommendations of it,
- a rather critical approach to social media,
- price, quality and guarantee have a relatively low influence.

The contemporary consumer is able to filter information efficiently and move around freely among various channels that supply it. Consumers expect high quality tailor-made products at a affordable price. The most important features that differentiate them from the earlier generation include:

- greater caution and the fact that they read information about a product or a service more carefully before it is purchased,
- the fact that they find the price to be the most important factor that influences their purchase decision, which is then followed by quality. Consumers often treat these factors on a par,
- consumer preferences evolving towards online buys. Apart from searching product and service related information the ability to make a purchase online is also starting to play a significant role (Driggs, 2012).

All Internet users are more and more willing to use newer and newer applications related to using web resources. Thanks to them users can find out about their place of rest mainly saving time. At present the comfort of acquiring information without leaving home is not the only convenience but is the one that has the greatest influence over our predispositions and preferences. Constantly increasing availability of tourist information, continued development of mobile devices and applications and recommendations from those perceived as experts in travelling are the most

important factors that are conducive to developing new ways of travelling and spending leisure time. For this reason e-tourists have both theoretical and often practical knowledge about travelling. Those are people who value the quality of information that they have obtained and are able to use it. They have been brought up in an information society, which they are very well aware of. They often cannot afford to travel in real time and the only option they have is to travel virtually.

An e-tourist is also an e-consumer. If we were to follow a loose and very limited interpretation by MacCannell (2002), a tourist would be defined as a real human being who is flesh and blood. Yet tourists perform various functions. The word denotes real tourists – those engaged in sightseeing (usually these are members of the middle class) and scattered all over the world to search for new experiences. If we only take a broader perspective not only in the context of performing various activities that prepare us to go on a journey, it will turn out that we can consume tourist services in virtual time, which makes us e-tourists. One of the directions of consumer interests related to the development of information technologies is to take a virtual tour, which also or first of all promotes the e-tourist profile. Virtual sightseeing is a computer visualisation of real places give visitors the impression of actually being in a particular spot (based on *Virtual Tours*). A virtual visit cannot take place without a virtual space, which means that the former is associated with using opportunities that the Internet offers and taking up a virtual tourist space. In this case space is defined as an unreal space which theoretically can exist or exists, but not at a particular place (i.e. where an e-tourist is staying) and time (Włodarczyk, 2007, as cited in Stepaniuk). The biggest advantage of a virtual visit is that a consumer can choose all the factors related to the consumption of the positive aspects of tourism on his or her own.

Changes to the behaviours of the current consumer can be explained by an increase in his or her self-organisation which has taken place over a dozen or so years. This growth is not only caused by the increased importance of new technologies, but also first of all by a rise in trust towards people. It can be defined as community consumption which entails sharing, lending, borrowing and exchange on an unprecedented scale. The initiative has become quite popular among travellers who are usually seen as a group which is more open to new experiences than others. It is called carpooling, which is a form of hitchhiking and is an inexpensive way to travel. Using a variety of applications first on Facebook and then in many other Internet services it is possible to match drivers and potential passengers even on the websites of Polish passenger carriers as another travel option for a shorter period of time for less money. Another example of consumers organising themselves is the so called *couchsurfing*. Earlier a similar function was performed by Hospitality Club, which is still enjoying quite a lot of popularity among Poles. The main idea behind the initiatives is to search and find online a particular inhabitant of the city that the user is planning to go to and use free accommodation with that person. This initiative makes it possible to not only travel more cheaply, but also build closer intercultural relations.

Alterations to our behaviour as we search and buy interesting tourist offers confirm that the consumer profile is undergoing changes and that employers are adapting to consumer needs. Completing an online purchase is largely dependent on the product that has been bought. The most popular items bought online are:

- plane tickets in the form of e-tickets (77% of plane tickets are purchased via the Internet). The vast majority of plane tickets from low-cost carriers are available only on their websites and the fact that other companies also offer discount deals means that the tool is more and more often used because it is faster,
- a room in an accommodation facility is usually bought in a traditional way, despite the fact that booking is mainly made via the Internet. However, technological limitations of most accommodation facilities often make it impossible to complete the purchase (Figure 2).

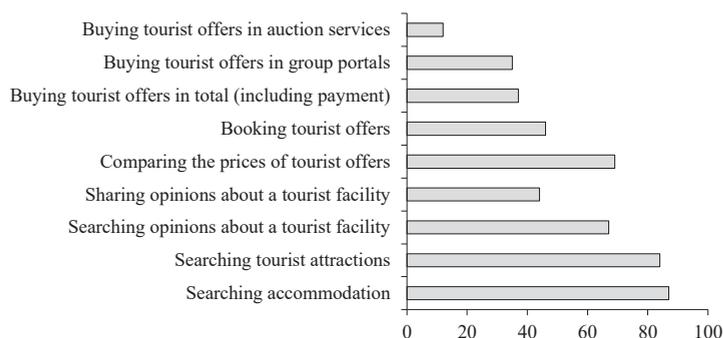


Figure 2 Possibilities of using the Internet in the decision making process and its completion as a tourist offer is bought

Source: *Produkty i usługi turystyczne w Internecie*, ww.google.pl/intl/pl/adwords/resources/turystyka_2008.pdf, 2008.

Using the Internet in a variety of ways during each stage of our lives enables outlining some sort of the basis for the e-tourist profile. It can be noticed that it is a combination of two elements: saving money on purchases and devoting the least amount of time to shopping. The most important features of a e-tourist include the ability to compare the prices of goods and services, seek discounts, the reliability and reputation of sellers and active use of other people's opinions.

Conclusions

A thorough knowledge of e-consumers' behaviours is of utmost importance as seen from the perspective of corporate management. The way consumers make their decisions at the same time forces entrepreneurs to change the manner in which they promote their products and services. Consumers are more and more aware of what they want and seek indispensable information on their own. For this reason an entrepreneur should not only ensure that their website is constantly updated, but also to make sure their product is presented properly. It is also important that he or she monitors and reacts to their customers' opinions. Unfortunately recent research into companies using the Internet shows that the vast majority of entrepreneurs treat this tool in a quite conservative way and are not fully aware of the changing media space (SMG/KRC Poland Media, 2011). Therefore, as it

has already been mentioned, companies have to continue to adapt to changes that are taking place in the consumer profile. Particularly they need to:

- constantly acquire information about various behaviours and preferences (because consumers have a wide and multidimensional perspective),
- improve numerous communication channels between a company and a consumer (even the most recent ones which are mainly used by consumers),
- undertake permanent cooperation with consumers in order to influence their buying decisions,
- make sure that constant technological development should support the relationship between the company and its customer, and not replace it.

The analysis into the consumer of tourist services in the market and the impact that the Internet has on buying decisions in that matter has enabled combining the info on the tourist himself or herself with how he or she should be approached by the entrepreneur. For this reason features such as comfort (the ability to buy round the clock), time saving, the value of a product and the ability to modify an offer are becoming quite significant benefits of an offer to be sold, including a tourist one.

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WYKORZYSTANIE INTERNETU W PROCESIE DECYZYJNYM ZAKUPU OFERT TURYSTYCZNYCH

SŁOWA KLUCZOWE

społeczeństwo informacyjne, e-turysta, decyzje zakupowe

STRESZCZENIE

Coraz istotniejszym czynnikiem zmian staje się postępujący rozwój i upowszechnienie nowych technologii informacyjno-komunikacyjnych. Technologie informacyjno-komunikacyjne doprowadziły do znaczących przemian w komunikowaniu się, dając możliwość upowszechniania informacji bez pośrednictwa tradycyjnych mediów. Dzięki Internetowi firmy mogą tworzyć własne kanały komunikacji, skierowane bezpośrednio do obecnych i przyszłych klientów. Celem artykułu było wskazanie możliwości wykorzystania Internetu w podejmowaniu i realizacji decyzji zakupowych usług turystycznych. Artykuł został poświęcony istotnym przeobrażeniu, jakim podlega zjawisko turystyki poprzez upowszechnienie technologii informacyjno-komunikacyjnych. Internet i technologie mobilne zmieniają przestrzeń medialną, a wraz z nią także sposób komunikacji pomiędzy firmami i konsumentami.

THE SUBURBAN AREAS OF TOURIST AND RECREATION RECEPTION IN THE OPINION OF USERS. A COMPARATIVE CASE STUDY

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KEYWORDS

suburban zone, tourist policy, tourist product, tourist and recreational offer, tourist and recreational reception area

ABSTRACT

The aim of this study is to indicate possible directions of socioeconomic development of suburban communities of Wrocław and Legnica, understand the aims and directions of tourist migrations as well as the assessment of tourist offer, recreational and tourist services and tourist products of the area. The research was carried out in 12 suburban communities of Wrocław and Legnica in the 2012–2013 period. As a result of the research it has been established that the aims of tourist research are mainly leisure, sightseeing and sport activities. Most commonly visited areas and tourist-recreational centers are primarily areas of attractive natural environment and sport and recreational centers. The respondents have good and very good opinions of the tourist offer of both areas. Unfortunately, the share of outstanding tourist products in suburban communities of Wrocław and Legnica, indicating at their competitiveness in comparison to the neighboring cities and other communities, is very small. A significant discrepancy between the proposed further directions of development of tourist and recreational offer of the areas has been observed.

Introduction

Suburban areas of cities should be attractive destinations for tourism and recreation for the inhabitants, both of cities as well as suburban communities. Managing and developing assets and tourist-recreational infrastructure of these areas should be inspired by their social, cultural, natural and economic conditions. Tourist policy of such communities should result from specialist

and professional studies and the expectations of its beneficiaries, that is tourists, inhabitants and socioeconomic entities.

In the majority of strategic SWOT analyses in the studies of self-government units from direct vicinity of cities one can notice that they consider the vicinity and economic power of neighboring cities as their strength.¹ There are, however, known cases of Polish communities, which, in spite of such location and significant economic potential, including tourist potential, remained stagnant in the recent years. Solutions in this respect of communities, counties and provinces are usually a reflection of their social and cultural identity, but at the same time they follow the rules of rational financial management.²

The currently observed situation in this respect proves that in many cases of self-government units the agreed direction of development was rational, both in the initial stage of their functioning as well as today. There are, however, examples of areas where the economic and social transformations can be defined as sudden and dynamic, usually conditioned by their location and the influence of policy and development directions of neighboring cities, thus being not very rational and logical.

Both in spatial, infrastructural and socioeconomic planning, suburban communities need to correlate their strategic directions of development not only with regional and county guidelines, but also with the policy and economy of neighboring cities, since it is quite often that the self-governments create tourist or sport and recreation products unsuited for their area and they can not be in the slightest extent identified with it.

In Poland tourism on the self-government level has been recently a top priority issue, setting the image and identification of communities on the regional, national and international scale. The recognition of self-government units through the prism of their economic power, investment attractiveness and tourist-recreational potential has become the most important landmark of quality of their socioeconomic policy.³ In the case of suburban communities of large cities it is especially important, as they usually have small structural resources, mainly tourist assets, and they have now long been merely the “bedrooms” of large cities. Moreover, most often the regional policy in terms

¹ R. Faracik, *Turystyka w strefie podmiejskiej Krakowa*, Uniwersytet Jagielloński, Kraków 2006; B. Meyer, D. Milewski (eds.), *Strategie rozwoju turystyki w regionie*, Wydawnictwo Naukowe PWN, Warszawa 2009; M. Sołtysik, *Uwarunkowania i modele międzysektorowej polityki turystycznej w podmiejskich gminach Legnicy i Wrocławia*, Studia i Monografie nr 116, AWF, Wrocław 2013.

² S. Liszewski, *Możliwości i kierunki rozwoju turystyki w Dolinie Odry*, Uniwersytet Łódzki, Łódź 2003; M. Marczak, *Skuteczność działań władz samorządowych Pomorza na rzecz rozwoju turystyki*, Zeszyty Naukowe Instytutu Ekonomii i Zarządzania Politechniki Koszalińskiej nr 12, Koszalin 2008; M. Sołtysik, S. Toczek-Werner, *Modele kooperacji międzysektorowej wspierające rozwój turystyki w gminach podmiejskich*, “Handel Wewnętrzny” 2009, vol. 55, nr 6, pp. 296–306; A. Tucki, A. Świeca, *Policy and Tourism Development as Exemplified by the Lublin Region (Southeast Poland)*, „Tourism Review International” 2013, Vol. 17, No. 2. Cognizant Comm. Corp., pp. 131–135.

³ R. Pawlusiński, *Samorząd lokalny a rozwój turystyki. Przykład gmin Wyżyny Krakowsko-Częstochowskiej*, Uniwersytet Jagielloński, Kraków 2005; A. Panasiuk, *Polityka turystyczna w oddziaływaniu na branżę turystyczną*, Prace Naukowe Uniwersytetu Ekonomicznego we Wrocławiu nr 259, Wrocław 2012; A. Przybylska, *Stymulowanie rozwoju turystyki na przykładzie wybranych gmin w dolinie Odry*, Bogucki Wydawnictwo Naukowe, Poznań 2012; M. Mika, *Założenia i determinanty podtrzymalności lokalnego rozwoju turystyki*, Instytut Geografii i Gospodarki Przestrzennej, Uniwersytet Jagielloński, Kraków 2014; M. Sołtysik, P. Oleśniewicz, D. Ilnicki, W. Fedyk, *Zróżnicowanie udziału sektora społecznego w rynku turystycznym i sportowo-rekreacyjnym podmiejskich gmin Dolnego Śląska*, Zeszyty Naukowe Uniwersytetu Szczecińskiego, Ekonomiczne Problemy Turystyki nr 2, Szczecin 2014, pp. 215–232.

of supporting the development of economy, including tourism and recreation, has decidedly strayed away from the real needs of their self-government institutions, social and economic institutions and finally the inhabitants of the communities. Thus, there is a need to research the offer (sport, tourist, recreational and cultural) and present and future directions of development of tourist policy of suburban communities of large cities and finding out whether it suits the real needs of its beneficiaries – inhabitants, tourists and visitors.

Methodological and organizational foundations of the research

A stock-taking, expert and poll research that was carried out in the 2012–2013 period in 12 suburban communities of Legnica and Wrocław in the Lower Silesia revealed essential correlations between their current tourist policy and socioeconomic, spatial and infrastructural factors.⁴

The research has shown that there is significant differentiation of inter-sector tourist policy in the suburban communities of Legnica and Wrocław, conditioned by or correlating with such factors as: demographic and social potential, structure of tourist and recreational space, state of tourist and recreational resources, the evaluation of tourist attractiveness and satisfaction with tourist, sport and recreational services, quality and recognition of tourist products, state of inter-sector cooperation, strategic and operational directions of development of tourism and recreation, as well as organizational and financial policy.

As a result of the research, it has been established that the state and directions of current tourist and recreational policy in the suburban areas of Legnica and Wrocław are a derivative of the size and structure of their natural and cultural potential as well as social determinants.

Taking into account the stipulations of the research it has been acknowledged that the opinions of tourists and visitors are most important both in the diagnostic as well as the forecasting stage. They are helpful in assessing the effects of pro-tourist activities in communities, planning further actions and adjusting the conditions for the reception of tourists. The opinions of tourists and visitors to the suburban areas who are usually the inhabitants of neighboring communities and cities, can be a source of important information for the people and institutions managing these areas as well as the entities operating there. This information concerns strategic and operational directions of their tourist, and, to further extent, socioeconomic activities.

The aim of the research, an integral part of the Lower Silesia research, is to establish, in the cognitive and utilitarian context, the directions of socioeconomic development of suburban communities of Legnica and Wrocław that may be the result of pro-tourist and pro-recreational activities of their managers. These directions have so far been set by, among others, opinions and assessments of main users – tourists and visitors. Understanding the aims and directions of tourist migrations, the assessment of tourist and recreational offer and services, accompanying the choice of destinations, may be a premise for the growth of investment attractiveness of these areas.

⁴ M. Sołtysik, op.cit.

It may lead to their activation and growth in entrepreneurship, thus boosting their socioeconomic development.

The following measures have been selected and described to fulfill the aims of the research:

- the aims of migrations and most often visited centers of tourist migrations in the suburban areas,
- offer as well as quality of infrastructure and tourist and recreational services in the visited communities,
- outstanding tourist and recreational products in the suburban communities and their competitiveness with the products from neighboring communities and cities,
- the directions of tourist offer and socioeconomic policy towards the development of tourist and recreational function of the suburban communities.

The research has been carried out amongst the tourists and visitors to the selected suburban communities of Legnica and Wrocław. The suburban communities where the research took place have been selected according to two criteria: they are in the direct neighborhood of a city (it usually generates tourist migrations onto suburban areas) and there is a transport route, usually national or international, running through the community (it usually shapes the size and dynamics of tourist flow between the agglomeration and its surroundings). Thus the following communities have been selected:

- 4 communities of the suburban zone of Legnica: Krotoszyce, Kunice, Legnickie Pole, Miłkowice (Legnica County),
- 8 communities of the suburban zone of Wrocław: Czernica, Długoleśka, Kały Wrocławskie, Kobierzyce, Siechnice (Wrocław County), and Oborniki Śląskie, Wisznia Mała (Trzebnica County) as well as Miękinia (Środka Śląska County).

The results of the research are subjected to statistical analysis, taking into consideration classification, summary and fractional typologies, according to the zone criterion.

The poll research has been carried out by direct interviews with respondents. Taking into account methodological issues, the research has been carried out on 1,139 inhabitants aged 15 and more, permanently living in the researched suburban zones, and on 1,200 tourists and visitors. Furthermore, the research has been carried out in the zones and centers of the biggest concentration of tourist migrations, buildings where sport, recreational, cultural and entertainment activities are undertaken as well as in the seats of communities, selected non-government organizations, enterprises and structural public units. In order to select a representative sample of tourists and visitors, a comparative structure of subsets and sections was used.⁵

⁵ K. Mazurek-Lopacińska, *Badania marketingowe. Teoria i praktyka*, Wydawnictwo Naukowe PWN, Warszawa 2011; T. Pilch, T. Bauman, *Zasady badań pedagogicznych. Strategie ilościowe i jakościowe*, Wydawnictwo Akademickie ŻAK, Warszawa 2001; S. Juszczyk, *Metodologia badań empirycznych w naukach społecznych*, AWF, Katowice 2001.

Research results

Amongst a number of significant issues describing and explaining the development of tourism and recreation in the suburban areas of two most significant agglomerations of the Lower Silesia, the aims of tourist and recreational migrations are considered the most important ones. Six main aims of migrations are as follows: leisure, sightseeing, health, sport, business and religious (Figure 1).

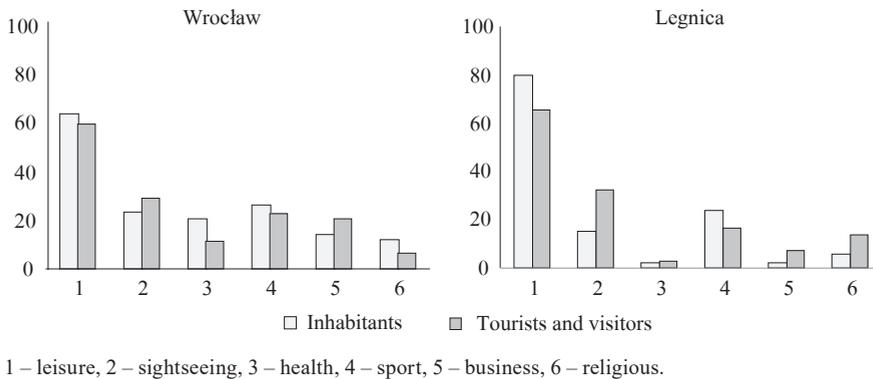


Figure 1. Aims of migration of inhabitants, tourists and visitors to suburban areas of Wrocław and Legnica

Source: own research.

The aims of migrations of tourists and visitors to both of the discussed suburban zones are similar, however there are some discernible differences resulting from the character of central cities of these zones. The aim of tourist migrations of inhabitants, tourists and visitors onto the suburban areas of Wrocław and Legnica is first and foremost leisure (60–80% of responses). In the case of Wrocław’s suburban areas most commonly visited communities (70% answers and above) by the inhabitants are Miękinia and Oborniki Śląskie. Also the tourists most commonly indicate Miękinia, then Wisznia Mała and Czernica. In the case of Legnica’s suburban zone, the inhabitants choose all four communities as their tourist destination, while the tourists choose mainly Kunice and Miłkowice communities. A bigger share of leisure migrations to the Legnica zone results from the presence of water bodies serving as watering places (especially the Kunickie Lake), as leisure time by the water is one of the most popular ways of spending Poles’ free time. There are less natural water bodies around Wrocław, but the area abounds in palaces and churches, which have been restored in the recent years and turned into stylish hotels (for example the residence hotels such as Prężyce, Samotwór, Ślęza) or private residences (for example Gosławice), thus a bigger share of sightseeing migrations of inhabitants to Wrocław suburban zone.

The second most popular aim of migrations is different: for the inhabitants of both suburban areas it is sport (accordingly 26% answers in the Wrocław zone and 23% in the Legnica zone), but for the tourists and visitors it is sightseeing (29 and 32% accordingly). A bigger significance

of health and sport tourism in the Wrocław suburban area is a result of the fashion for a healthy lifestyle, which is more pronounced in large cities; it also results from the need to get away from everyday stress and change of surrounding. One must remember, however, that there are no health resorts in the area, in spite of the fact that some people deem Oborniki Śląskie to be one. It used to have an official health resort status before World War II, though. The typical spatial “health resort” layout of the place, including some historical buildings, is still visible in the east and north-east part of the town. In the Legnica suburban zone the most commonly visited communities (by tourists and visitors) for sightseeing were Legnickie Pole and Miękinia. It is somehow surprising to see the lesser importance of sightseeing tourism in the case of Wrocław suburban zone, because it is here where more anthropogenic attractions are located, especially palaces,⁶ which have been recently restored. But maybe the offer of Wrocław itself and its anthropogenic attractions is so strong that the tourists and visitors to the suburban zones do not find the suburban ones to be as attractive. There are, however, undoubtedly more wild nature reserves around Legnica.

In the vicinity of Wrocław, being an important economic center of the south-eastern Poland and promoting itself as a business and conference center, the business aim of migrations is definitely more important than in the Legnica zone. Most business tourists (around 30% of arrivals) visited Oborniki Śląskie, Kobierzyce and Długołęka communities.

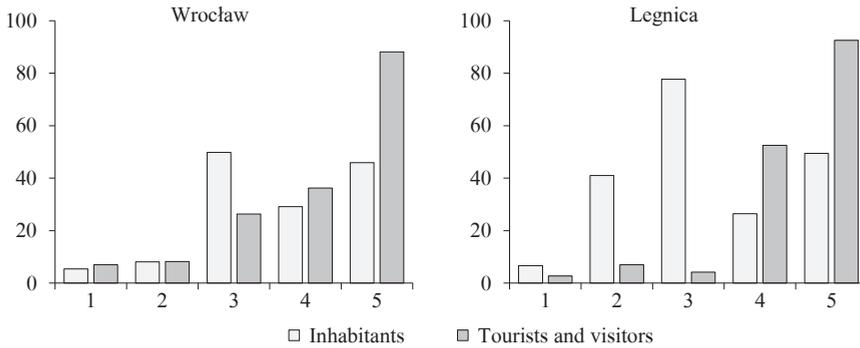
In general, religious aims are less important in both suburban areas, although there are exceptions: the Legnickie Pole community was the destination of 45% of religious visits of tourists and visitors. The importance of religious tourism in the area may be strictly connected with the existence of the Benedictine abbey in Legnickie Pole, which is a regionally important religious and pilgrimage center.⁷ There is also a sanctuary in the Kąty Wrocławskie community, in Sośnica, but its rank is much smaller and rather local.

The sort of visited centers, areas and tourist-recreational installations was the next analyzed issue. The researchers singled out five types of visited centers (Figure 2). There are discernibly big differences in their utilization by the inhabitants, tourists and visitors.

The inhabitants of the analyzed areas used above all the sport and recreational centers and attractive natural environment areas, and to a lesser extent shopping and service centers and public utility places. Amongst the tourists and visitors the most important destinations were attractive natural environment areas (forests, water bodies, parks), and, to a lesser extent, public utility places and service centers. It correlates with the previously presented main aim of tourist migrations (which is leisure). A bigger share of natural environment destinations (among other nature reserves) and organized leisure centers among the tourists and visitors to the surroundings of Legnica is a result of their relatively greater number. In the vicinity of Wrocław rural areas dominate, especially in the southern part.

⁶ J. Czerwiński, *Dolny Śląsk – przewodnik*, Eko-Graf, Wrocław 2009.

⁷ J. Wyrzykowski, J. Marak, B. Mikułowski, *Turystyka na Dolnym Śląsku i Śląsku Opolskim*, Stowarzyszenie na Rzecz Promocji Dolnego Śląska, Wrocław 1999.



1 – culture and entertainment centers (events), 2 – cultural centers (historical monuments, contemporary culture), 3 – sport or recreational center, 4 – shopping and service center, public utility place, 5 – attractive natural environment.

Figure 2. Tourist and recreational centers most often visited by inhabitants, tourists and visitors in the suburban zones of Wrocław and Legnica

Source: own research.

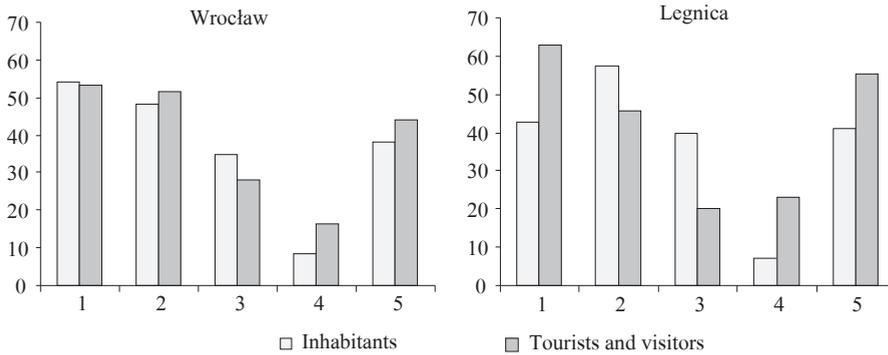
In the case of the Wrocław suburban zone also staying at sport and recreational centers is of importance – it is noticeably bigger for tourists and visitors (26.4% and only 4.3 in Legnica’s zone). It corresponds with the aims of visits (sport aims are more important in the Wrocław than in the Legnica suburban zone); furthermore it is a result of a better developed sport and recreational infrastructure in the Wrocław suburban zone.

The Legnica’s suburban zone is more popular as a shopping and service destination (52.5% in Legnica’s surroundings and 36.3% in Wrocław’s surroundings). It may result from a less pronounced central role of Legnica itself and the attractiveness of Legnica’s surroundings for the inhabitants of the city in terms of shopping.

In both researched areas there is a low level of participation in the cultural and entertainment events and visits to cultural centers (with the exception of the Legnica zone with Legnickie Pole). Here we can see a discordance with the declared aims of visits – more people declared that they migrated for sightseeing purposes.

The kind of services used by the inhabitants, tourists and visitors was a result of aims of migrations and visited tourist-recreational centers (Figure 3).

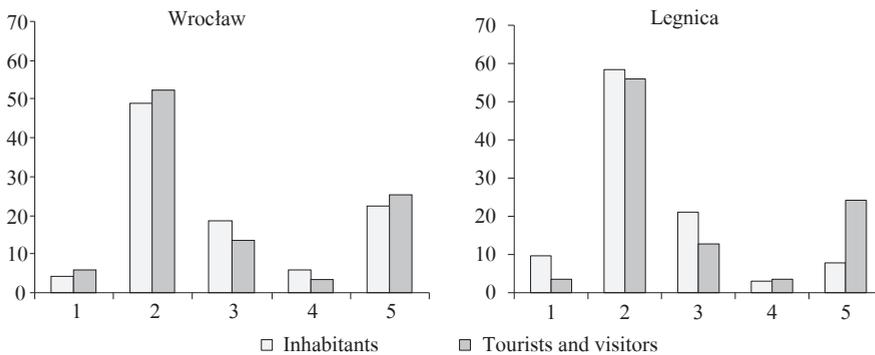
Both the inhabitants as well as tourists and visitors used to a large extent (40–60%) a wide array of tourist, sport, recreational and gastronomy services. There is a discernibly bigger participation of inhabitants (around 15–20%) in cultural services, which may be a result of their insufficient promotion outside the closest vicinity – the information about cultural events may have a meager spatial range. Also, one can notice a bigger degree of using accommodation services among the tourists (10–15% more than the inhabitants), which may result from the fact that the inhabitants of suburban zones may sleep at their friends or family homes.



1 – tourist, 2 – sport and recreational, 3 – cultural, 4 – accommodation, 5 – gastronomy.

Figure 3. Types of infrastructure and services used by the inhabitants, tourists and visitors to the suburban zones of Wrocław and Legnica

Source: own research.



1 – very good, 2 – good, 3 – bad, 4 – very bad, 5 – no opinion.

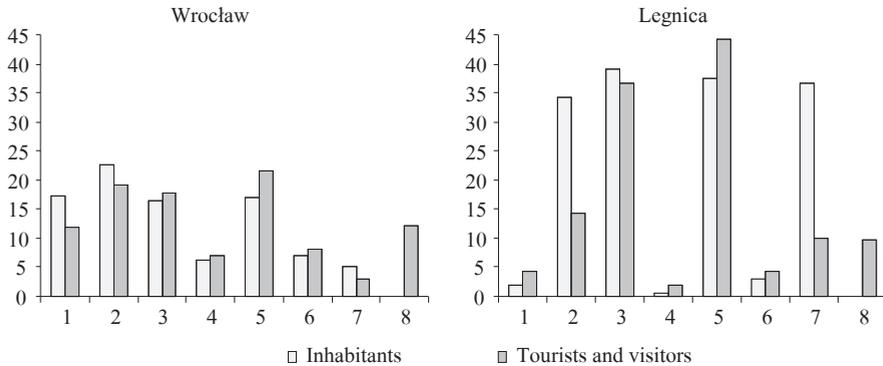
Figure 4. Assessment of tourist offer of suburban zone of Wrocław and Legnica by inhabitants, tourists and visitors

Source: own research.

The inhabitants of the researched areas, tourists and visitors have also been asked to evaluate the tourist offer of the visited area. More than half of the respondents (53–68%) from both groups evaluate the offer as being good and very good, both in the Wrocław as well as Legnica zones. It is perhaps worth noticing that there is a slightly bigger share of “very good” opinions in the case of the Wrocław zone, balanced by the bigger share of “good” opinions in the Legnica zone.

There are also quite many „no opinion” answers (more than 20%) from both researched groups in the Wrocław zone and tourists and visitors from the Legnica zone.

Tourist products are also part of a tourist offer of an area. They distinguish a given area from other areas. The respondents from both groups have given quite varied answers that are grouped into 7 categories in the case of inhabitants and 8 categories in the case of tourists and visitors (Figure 5).



1 – sport and recreational centers, 2 – valuable natural environment areas, 3 – cultural, entertainment and leisure centers, 4 – local foods, folklore, 5 – material culture objects, religious centers, 6 – accommodation, gastronomy, shopping centers, 7 – cultural, sporting, recreational, entertainment events, 8 – tourist penetration routes.

Figure 5. Outstanding types of tourist products according to the inhabitants, tourists and visitors to the suburban zones of Wrocław and Legnica

Source: own research.

According to the inhabitants of the Wrocław suburban area, the most distinctive products of their area belong into four categories. These are: valuable natural environment areas (23%), then sport and recreational centers (17%) as well as material culture objects and religious centers (17%) and finally cultural, entertainment and leisure centers (16%). The same groups are deemed important by the tourists and visitors; they also distinguish tourist penetration routes as important (these are, for example, tourist trails and bicycle trails). Basing on these answers one cannot, however, distinguish clear-cut, dominating groups of tourist products, as the span of the answers is small (18% in the case of inhabitants and 19% in the case of tourists and visitors).

In the case of the Legnica suburban zone, the respondents give much more varied answers. According to the inhabitants, it is distinguished by the products of cultural, entertainment and leisure centers (39%), material culture objects and religious centers (37%) and cultural, sporting, recreational, entertainment events (also 37%), and finally valuable natural environment areas (34%). The remaining groups of products are given only 1 to 3% of responses. For example, only to a very small extent have the respondents paid tribute to the offer of local foods (wines, juices); the situation is somewhat better in the case of the Wrocław suburban zone.

According to the tourists and visitors to the Legnica suburban zone, two categories of tourist products stand out: material culture and religious centers (44%), and cultural, entertainment and

leisure centers (37%). This time the span of answers is large: 38% in the case of inhabitants and 42% in the case of tourists and visitors, which can be a proof of a better promotion of these products.

The biggest differences between the two zones can be seen in the case of products of (1) cultural, entertainment and leisure centers and (2) material culture objects and religious centers. In both cases these products are much more commonly indicated by the respondents in the Legnica zone (accordingly 36.8% Legnica zone versus 17.9% Wrocław, and 44.3% versus 21.5%). A bigger importance of the first group of products can be a result of the presence of several well managed recreational centers close by water bodies (the Kunickie and the Koskowickie Lake). Such centers, not necessarily located by the lake, also exist in the vicinity of Wrocław, but they are located further away, beyond the researched area (Wzgórza Trzebnickie, Dolina Baryczy, Masyw Ślęży). It is true that suitable recreational areas do exist around Wrocław as well, but they are not as well managed; it is also hard to point out the best ones. The second group of products, that is material culture objects and religious centers, is somehow surprisingly underrepresented in the Wrocław area responses, as it is here where more cultural heritage buildings exist; part of them is being restored and promoted as tourist products. Probably in the case of the Legnica zone, the Legnickie Pole abbey and Krotoszyce palace are most significant tourist products in this category. Also, in the opinion of inhabitants, the Legnica suburban zone stands out in another category of tourist products, that is cultural, sporting, recreational, entertainment events.

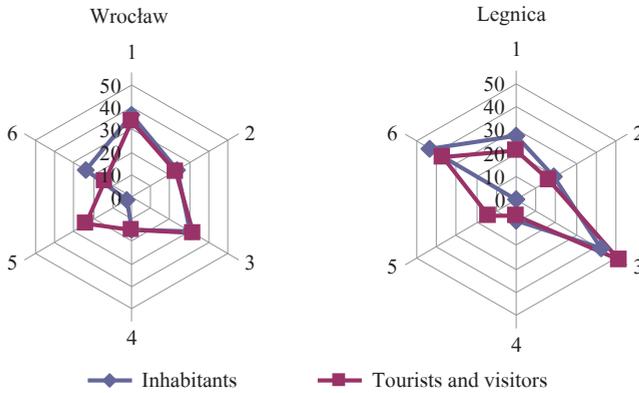
It is significant that in the Wrocław suburban communities the respondents are not able to point out clearly any outstanding tourist product. It may be explained by the lack of interest, inadequate promotion of these products, or – surprisingly – by their better understanding of what a tourist product really is. In fact, there are only a few fully developed tourist products in the surrounding areas of Wrocław and Legnica. In the case of Wrocław we can notice a strong contrast between a highly developed tourist offer of Lower Silesian capitol and its neighboring communities. Tourist products do, however, get created, in the areas surrounding Wrocław. For example eco–museums (in the Zabor Wielki village within the Miękinia community) or the Topacz castle in Ślęza near Bielany Wrocławskie. In the surroundings of Legnica certain products are being created as in the Battle of Legnica theme.

The Wrocław suburban zone has the advantage over the Legnica zone in the remaining categories of tourist products, but the difference is rather small. It is mainly the result of better infrastructure development in the Wrocław area.

The inhabitants, tourists and visitors have finally been asked to suggest further directions of development of tourist and recreational policy and offer of the visited suburban areas. A wide array of answers has been collected and grouped into six categories (Figure 6).

In the case of the Wrocław suburban zone the inhabitants have selected answers from four out of six groups (more than 20% of answers). The need to provide better accessibility to sport, recreational, cultural and entertainment events is deemed most important, followed by aiding and promoting the offer of varied forms of tourist activity – it is the opinion of both inhabitants and tourists. Least important for the inhabitants is to intensify inter-sector financial and non-financial

actions towards the development of tourist and recreational function of the area (2.6%), while tourists and visitors found it a quite important issue, calling for further actions.



1 – providing better accessibility to sport, recreational, cultural and entertainment events, 2 – investing in modern tourism and recreation facilities, 3 – aiding and promoting the offer of varied forms of tourist activity, 4 – better information on local attractions as well as tourist and recreational products, 5 – intensification of inter-sector financial and non-financial actions towards the development of tourist and recreational function, 6 – enhancing the process of adjustment and management of valuable natural environment areas and cultural heritage objects for tourist and recreational purposes.

Figure 6. Suggested directions of the development of tourist offer and tourist- recreational policy of Wrocław and Legnica suburban zones

Source: own research.

The respondents of Legnica suburban zone gave more varied answers. In their opinion it was most important to enhance the process of adjustment and management of valuable natural environment areas and cultural heritage objects for tourist and recreational purposes (42.2% inhabitants; 36.3% tourists and visitors) and aiding and promoting the offer of varied forms of tourist activity (41.6 and 50.6% accordingly). Similarly as in the Wrocław zone the inhabitants do not find it relevant to intensify inter-sector financial and non-financial actions towards the development of tourist and recreational function of the area, while the tourists and visitors – have found it important.

These results correspond with the main aims of visits to both areas where in the case of the Wrocław area it is relatively more important to play sports and the Legnica area – leisure and sightseeing.

Conclusions

The results of the comparative study of users’ opinions on the researched suburban communities allow to form several important conclusions. The respondents assess the current state

and perspectives of pro tourist development of the researched areas, and it may be a basis for setting actual and future directions of investments and public actions for the tourist and recreation entities. It may have a significant meaning in constructing their pro tourist identity and competitive position.

The study has shown that the two researched areas differ in their adjustment to the reception of tourist and recreational migrations. One may also draw several conclusions from the opinions of both researched groups of respondents:

1. Primary aims of tourist migrations of inhabitants and tourists to both suburban areas are leisure, sightseeing and sporting activities (participants, fans).
2. Both inhabitants as well as tourists to the researched areas indicate firstly areas of attractive natural environment as their destination. It is followed by sport and recreational centers. However, the answers vary in percentage depending on the suburban zone.
3. The inhabitants and tourists used to a large extent a wide array of tourist, sport, recreational and gastronomy services, but there is a discernibly bigger participation of inhabitants in cultural services.
4. In both suburban zones the respondents assessed their tourist and recreational offer mainly as “good and very good”.
5. The respondents could not clearly state if there are any tourist products that may decide on the level of competitiveness in the researched communities in comparison to the neighboring city and other communities. There is, however, a discernible difference between the Wrocław and the Legnica zones. In the case of Legnica zone around 40% of the tourists and inhabitants indicate material culture objects, religious centers and cultural, entertainment and leisure centers as tourist products of the area. In the case of Wrocław there is no leading group of tourist products; around 20% of the respondents indicate material culture objects and valuable natural environment areas.
6. There is a discernible discrepancy of tourists’ and inhabitants’ proposals of further development of tourist and recreational offer of the visited suburban areas and actions leading to their strengthening. In the case of the Legnica zone it is mainly (1) aiding and promoting the offer of varied forms of tourist activity and (2) enhancing the process of adjustment and management of valuable natural environment areas and cultural heritage objects for tourist and recreational purposes (both options have received almost half of the answers). In Wrocław there is no leading answer; the respondents indicate actions and directions belonging to four out of six groups, mainly (more than 30% of answers) providing better accessibility to sport, recreational, cultural and entertainment events, and aiding and promoting the offer of varied forms of tourist activity.

The issue of assessment of attractiveness of assets and character of tourist products or the level of development of functions of tourist destination is currently often discussed by researchers, both in the theoretical and empirical aspect. It is because the results of such studies are significant for managing a sustainable development of the tourism sector, especially if they are based on multi-faceted assessment of its users – in this case these are the inhabitants, tourists and visitors.

One should emphasize that the suburban areas of tourist and recreational reception that are under a strong influence (positive and negative) of large cities,⁸ need multi-aspect and deepened research, such as the one presented in this study.

The methodology of the presented research might be used not only for researching suburban communities, but also to assess other types of self-government units, irrespectively of their spatial location or owned pro tourist assets, as well as making comparative analyses that are necessary in securing sustainable development of a region or a country.

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⁸ M. Sołtysik, op.cit.

PODMIEJSKIE OBSZARY RECEPCJI TURYSTYCZNO- -WYPOCZYNKOWEJ W OCENIE INTERESARIUSZY. KOMPARATYSTYCZNA ANALIZA PRZYPADKU

SŁOWA KLUCZOWE

strefa podmiejska, polityka turystyczna, produkt turystyczny, oferta turystyczno-rekreacyjna, obszar recepcji turystycznej i wypoczynkowej.

STRESZCZENIE

Celem niniejszego opracowania było określenie możliwych kierunków rozwoju społeczno-gospodarczego gmin podmiejskich Legnicy i Wrocławia, zrozumienie celów i kierunków migracji turystycznych, a także ocena oferty i usług turystyczno-wypoczynkowych i oferowanych produktów turystycznych. Badanie zostało przeprowadzone w 12 gminach podmiejskich Wrocławia i Legnicy w latach 2012–2013. W wyniku zrealizowanych badań ustalono, że cele migracji turystycznych na te tereny są głównie wypoczynkowe, krajoznawcze oraz związane z aktywnością sportową. Wśród najczęściej odwiedzanych obszarów i ośrodków turystyczno-wypoczynkowych w gminach podmiejskich, wskazywano w pierwszej kolejności tereny o wyróżniających się walorach środowiska przyrodniczego oraz ośrodki sportowo-rekreacyjno-turystyczne. Ocena skali i jakości oferty turystycznej obu stref podmiejskich kształtuje się na dobrym poziomie. Niestety, udział wyróżniających się produktów turystycznych w gminach podmiejskich Legnicy i Wrocławia stanowiących o konkurencyjności tych obszarów, w odniesieniu do sąsiadującego miasta lub innych gmin wiejskich jest niewielki. Zaobserwowano ponadto znaczącą rozbieżność ocen mieszkańców i turystów w zakresie kierunków rozwoju oferty turystyczno-wypoczynkowej odwiedzanych obszarów podmiejskich oraz proponowanych działań prowadzących do jej wzmocnienia.

THE TOURISM POTENTIAL OF THE COUNTIES LOCATED IN THE KUYAVIA-POMERANIA AND POMERANIA PROVINCES IN RESPECT OF WATERWAYS REVITALISATION

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ABSTRACT

The aim of the paper is to depict the tourism potential of the communes located in the vicinity of the River Vistula (in the Kuyavia-Pomerania and Pomerania Provinces), to perceive that potential as a major factor in socio-economic activation of the region, and finally to study the impact of the Vistula revitalization on the development of tourism especially in relation to the improvement of tourist-centred applications. It can be assumed that the depicted region possesses the necessary potential, both natural and cultural, to develop various types and forms of tourism. Still, this development is conditioned by the current state of tourist-centred preparations and local economy, especially in relation to expenditure on tourism. In addition, one can suppose that the development of tourism will be supported by fulfilling the tasks aimed at the revitalisation of the lower course of the River Vistula, mainly focusing on the E70 waterway fragment. The analysis of the socio-economic situation together with the tourism potential in the studied region has been enabled by the statistical data provided by the Local Data Bank of the Central Statistical Office (Bank Danych Lokalnych GUS), and by finding documents and analysis relating to the revitalisation of inland waterways in Poland. The collected data refers to 2013.

Introduction

After years of neglect, the River Vistula gained in importance and is finally noticed by entrepreneurs and academics of various fields. This is caused by the discovery of the river's untapped potential. A great change of perspective has been brought by the integration of Poland with the European Union, where waterways are fully utilized for both economy and tourism. It can be claimed that the River Vistula is a unique waterway. Unlike most other European rivers, it has

not been strongly affected by regulations. As a result, many habitats and nesting grounds for both fauna and flora can be found in its vicinity.¹ It functions as an international ecological corridor, and, in consequence, most of it is included in the Natura 2000 network. In effect, it is postulated that any human activity related to the River Vistula should always take into account the primacy of the natural environment.² It seems to be similar to the principle of ecological river management introduced in the mid 1990s.³

At the same time, the River Vistula functions as an essential element of inland waterways in respect of tourism and economy: International Waterway E70 connecting West Europe (Antwerp) with East Europe (Klaipeda), and International Waterway E40 joining the Baltic Sea (Gdańsk) with the Black Sea (Odessa). A more conscious approach to the utilization of those routes for both tourism and transportation could become an impulse in developing nearby communes, regions, and consequently, the whole country. This process is hindered by a prolonged neglect of infrastructure and of adaptations preparing the river for transportation of goods. As a result, the River Vistula is classified as a regional and unfavourable shipping route of: Ia, Ib, II, and III classes. The stretches of the river adequate for those purposes, and hence deemed as international shipping routes (classes: IV, Va, and Vb), constitute barely 100 km. These sections can be found between the estuary of the River Przemsza and the Łączyński Canal, between Płock and Włocławek, and also the Martwa Wisła near Gdańsk.⁴ The classification referred to here is based on types of ships which can safely travel down the waterways. It also reflects the minimal size of those shipping routes and encountered water gates, spans of bridge pillars, pipelines, and other obstacles interfering with the river (cf. Inland Waterways Bill from 2013).⁵

Adjusting the Vistula routes to the optimal norms adequate for inland waterway transportation (class IV and higher) requires serious investments, e.g., constructing dams and barrages.⁶ It is estimated that at present waterways can be reconstructed to their 1940s state, when they belonged

¹ J. Angiel, *Rzeka Wisła, jej wartości i percepcja. Wisła w edukacji geograficznej*, Uniwersytet Warszawski, Wydział Geografii i Studiów Regionalnych, Warszawa 2011, p. 55; G. Leśniewski (ed), *Wisła dzika rzeka*, Lubelskie Towarzystwo Ornitologiczne, Wydawnictwo Epigraf, Warszawa 2012, p. 8; I. Sulimowicz, *Wykorzystanie dolin rzecznych Bydgosko-Toruńskiego Obszaru Metropolitalnego dla potrzeb rozwoju turystyki i rekreacji*, in: *Warunki rozwoju turystyki w dolinach rzecznych*, ed. M. Grabiszewski, Zeszyty Naukowe WSG, t. 15, nr 7, Wydawnictwo Uczelniane WSG, Bydgoszcz 2010, p. 60.

² J. Owsiak, J. Sewerniak, *Ekorozwój a turystyka na przykładzie dorzecza Drwęcy*, in: *Rola samorządu terytorialnego w kształtowaniu przestrzeni obszarów chronionych*, Ekologia w turystyce. Materiały konferencyjne, Włocławskie Centrum Edukacji Ekologicznej, Włocławek 2001, p. 57.

³ R. Barrakud, *Rivieres du futur, wild rivers?*, eds. D. Féménias, O. Sirost, «Fleuves, estuaires et cours d'eau: représentations et pratiques», Vertigo, hors-série 10/Décembre, <https://vertigo.revues.org/11411?lang=eng#bibliography>.

⁴ D. Rozkrut, *Żegluga śródlądowa w Polsce w latach 2006–2009*, GUS Urząd Statystyczny w Szczecinie, Warszawa 2010, pp. 18–19, www.stat.gov.pl.

⁵ Ustawa o żegludze śródlądowej z dnia 21 grudnia 2000 r., Dziennik Ustaw Rzeczypospolitej Polskiej z dnia 6 grudnia 2013 r. poz. 1458, Obwieszczenie Marszałka Sejmu Rzeczypospolitej Polskiej z dnia 15 października 2013 r. w sprawie ogłoszenia jednolitego tekstu ustawy o żegludze śródlądowej.

⁶ Z. Brenda, *Dolna Wisła – droga wodna, obszar aktywizacji gospodarczej województwa kujawsko-pomorskiego*, „Gospodarka Wodna”, 2013, nr 6, pp. 213–216.

to class III.⁷ Currently those sections of the River Vistula which can boast class II, can be accessed by small crafts with draught below 50 cm, by small boats for tourists, and by kayaks,⁸ and even that only when the water level is satisfactorily high. However, it can be claimed that what is inadequate to transport is more than appreciated by water tourism and riverside tourism. Such a claim is supported by the fact that both the river and its valley retained their features, which make them spellbinding from the perspective of tourists. It must be mentioned here that Poland has not signed the European Agreement on Main Inland Waterways of International Importance (AGN) due to the lack of a possibility to conform with European standards. As a result, undertaken tasks are limited to maintaining and modernising present tourism-centred waterways in relation to the registry of heritage.⁹ Z Sulimowicz supports this view when reflecting that in order to cope with EU trends, with stimulating the development of waterways, but also bearing in mind the need to protect and promote the largest European natural resort found in Poland, it seems most reasonable to adopt the mentioned waterways for the purpose of tourism and recreation.¹⁰

Moreover, tourism should positively impact on the development of waterways and river transport, and it can spark the development of lands found in the vicinity of rivers. Tourism seems to be the only rational chance to maintain the traffic on Polish waterways.¹¹ The example of the River Vistula is most prominent as in relation to proposed international routes only the E70 waterway can be adopted for the purpose of tourism at the Northern part of the River Vistula.¹² In recent years, various activities aimed at the utilization of tourist potential of the basin and the lower course of the River Vistula. Improving transportation and developing different forms of tourism became focal points. The promotion of the E70 waterway had a considerable impact on the situation, resulting from the 2009 document signed by six Councillors (West Pomerania, Lubusz, Great Poland, Kujawy–Pomerania, Pomerania, and Warmia–Mazovia) entitled “Preparations for the spatial policy of the revitalisation of inland East-to-West waterway encompassing Oder, Warta, Noteć, Bydgoszcz Canal, Vistula, Nogat, Szkarpowka, and the Vistula Lagoon (plans for the Polish stretch of the E70 waterway)”. Among other goals, the joint efforts are supposed to lead towards supporting initiatives aiming at the activation of water tourism on the E70 waterway by making the most of its cultural and natural resources. Secondly, these should allow starting initiatives aimed at

⁷ T. Jarzębińska, *Rola polskich dróg wodnych śródlądowych w sieci europejskiej*, in: *Rewitalizacja drogi wodnej Wisła–Odra szansą dla gospodarki regionu*, t. I, *Przyroda i turystyka regionu Pomorza i Kujaw*, ed. Z. Babiński, Urząd Marszałkowski Województwa Kujawsko-Pomorskiego, Instytut Geografii UKW, Bydgoszcz 2008, p. 15; R. Zamyślewski, *Wisła. Album map dla wodniaków. Przewodnik po polskich drogach wodnych*, Stowarzyszenie na rzecz turystyki aktywnej, rekreacji i wypoczynku „Szkoła Przygody”, Bydgoszcz 2011, p. 61.

⁸ Z. Brenda, op.cit.

⁹ T. Jarzębińska, op.cit., p. 18.

¹⁰ I. Sulimowicz, op.cit., p. 64.

¹¹ T. Jarzębińska, op.cit., p. 15; W. Łożewski, *Partnerstwo w rozwoju dróg wodnych. Miejsce żeglugi towarowej w planach rewitalizacji drogi wodnej Wisła–Odra*, in: *Rewitalizacja drogi wodnej Wisła–Odra szansą dla gospodarki regionu*, t. III, *Przyroda i turystyka regionu Pomorza i Kujaw*, ed. Z. Babiński, Urząd Marszałkowski Województwa Kujawsko-Pomorskiego, Instytut Geografii UKW, Bydgoszcz 2009, p. 176; R. Wasil, *Rewitalizacja szlaków wodnych Dłty Wisły i Zalewu Wiślanego*, in: *Rewitalizacja drogi wodnej...*, t. I, p. 61.

¹² T. Jarzębińska, op.cit., p. 15.

the ratification of the European Agreement on Main Inland Waterways of International Importance (AGN) as in due course it would commit the government to adapting Polish waterways to European standards.¹³

Methodology and Scope of Research

In the light of the abovementioned issues, this paper's aim is to depict the tourism potential of communes located in the vicinity of the River Vistula, to perceive that potential as a major factor in socio-economic activation of the region, and finally to study the impact of Vistula revitalization on the development of tourism especially in relation to the improvement of tourist-centred applications. As a result of a specific nature of the river, namely due to its diversified hydrological, landscape, and economic features, the presented analysis will be spatially limited to the lower course of the River Vistula found in the Kujawy-Pomerania and the Pomerania Provinces (first order of administrative regions in Poland, equivalent to counties or provinces in many countries). Owing to the previous actions as well as to cultural and anthropogenic qualities, this region is believed to be predisposed towards the development of tourism and recreation.

The contemporary utilisation of the lower course of the River Vistula both for tourism and transportation is rather limited, however, it can be assumed that the depicted region possesses the necessary potential, both natural and cultural, to develop various types and forms of tourism. Still, this development is conditioned by the current state of tourist-centred preparations and local economy, especially in relation to expenditure on tourism. In addition, one can suppose that the development of tourism will be supported by fulfilling the tasks aimed at the revitalisation of the lower course of the River Vistula, mainly focusing on the E70 waterway fragment.

For the purpose of the presented study, the lower course of the River Vistula is not understood as a physical-geographical region stretching from Fordon in Bydgoszcz up to *Żuławy*, despite the fact that this is consistent with the widespread division of Poland into physical-geographical regions.¹⁴ Instead, the span of the river from Narew to *Żuławy* is taken under the consideration. The following analysis relates to 54 selected riverside communes, out of which 37 are rural in nature and 17 are urban. Also largest towns and cities are studied due to their placement at the lower course of the river: Toruń, Bydgoszcz, and Gdańsk. As a result of the incomplete data found at the Regional Data Bank (*Bank Danych Regionalnych*), the analysis does not take into account the rural and urban communes of Sztum. The analysis of the socio-economic situation together with the tourism potential in the studied region has been enabled by the statistical data provided by the Local Data Bank of the Central Statistical Office (*Bank Danych Lokalnych GUS*), and by finding documents and analysis relating to the revitalisation of inland waterways in Poland. The collected data refers to the year 2013.

¹³ www.mdwe70.pl.

¹⁴ J. Kondracki, *Geografia Polski. Mezoregiony fizyczno-geograficzne*, PWN, Warszawa 1994.

It is possible to assess the tourism potential as a collection of factors influencing the capacity to develop tourism at a given location¹⁵ as a result of creating a comprehensive database for urban, rural-urban, and rural communes found near the River Vistula. After analysing the variables described in the Regional Data Bank,¹⁶ 29 features reflecting tourism potential have been selected and divided into three groups: tourism qualities, tourism development, and tourist traffic.¹⁷

In order to capture similarities in the tourism potential of respective communes, it is necessary to resort to applying multivariable calculus in order to analyse *k*-means clustering, as well as calculating the Euclidean distance for each administrative unit, which has been preceded by data standardisation. The initial results of *k*-means clustering, in relation to the data obtained from the database, have indicated that a substantial discrepancy between cities and the rest of communes assigned to other clusters, and, consequently, it seems justifiable to divide and re-calculate the results separately for urban and for rural areas. Such an approach is supported by the studies published jointly by Prof. S. Liszewski “Możliwości i kierunki rozwoju turystyki w Dolinie Odry” (“Possibilities for and Directions of Tourism Development in the Oder Valley”) (see page 13).¹⁸

The authors have also attempted to classify communes in respect of their current natural and cultural potential, tourism infrastructure as well as expenditures on and income from tourism. Secondly, they verified to what extent the current state of the tourist-centred preparations of the River Vistula enable the development of water tourism in the studied communes.

Tourism Function of Towns and Cities Located at the River Vistula

In order to assess the tourism relevance of communes found in the vicinity of the River Vistula, the authors have established tourism functions for each commune. This function is understood here as “all socio-economic activities in a location or region focusing on tourist services, which indicate the local capacity for fulfilling specific tourist needs.”¹⁹ Hence, tourism function depicts the level of tourism development of a commune, which in turn reflects a general socio-economic status. It is possible to perceive a developing tourism function of a location when the Baretje and Defert indicator reaches the value of 100, or in other words when the volume of accommodation for tourists equals the volume of local inhabitants.²⁰ The analysis of those indicators in the Kujawy-Pomerania and the Pomerania Provinces demonstrates that there is not a single commune, town or city with a primary tourist function. The highest Baretje and Defert indicators, reflecting the development

¹⁵ A. Zajadacz, J. Śniadek, *Ocena potencjału turystycznego*, in: *Uwarunkowania i plany rozwoju turystyki*, eds. Z. Młynarczyk, A. Zajadacz, t. III, *Walory i atrakcje turystyczne. Potencjał turystyczny. Plany rozwoju turystyki*, Wydawnictwo Naukowe UAM, Poznań 2009, pp. 35–58.

¹⁶ www.stat.gov.pl/bdl (15.09.2014).

¹⁷ J. Kaczmarek, A. Stasiak, B. Włodarczyk, *Produkt turystyczny*, PWE, Warszawa 2005, p. 52; A. Zajadacz, *Potencjał miast na przykładzie wybranych miast Sudetów Zachodnich*, Bogucki Wydawnictwo Naukowe, Poznań 2004, p. 40 after L. Butowski 1996.

¹⁸ S. Liszewski (ed), *Możliwości i kierunki rozwoju turystyki w Dolinie Odry*, Katedra Geografii Miast i Turyzmu, Łódzkie Towarzystwo Naukowe, Łódź 2003, p. 13.

¹⁹ Z. Kurek (ed), *Turystyka*, PWN, Warszawa 2007, p. 40.

²⁰ J. Warszzyńska, A. Jackowski, *Podstawy geografii turystyki*, PWN, Warszawa 1979, p. 67.

of tourism function, have been found for Ciechocinek (46) and the coastal commune of Stegna (54.4). For the rest of locations, the indicator is drastically lower: 5.4 (Gniew), 2.8 (Gdańsk), around 1.5 (Toruń and Grudziądz), and lower for other places. In 23 communes the indicator equals zero.

The highest density of the accommodation measured as a number of accommodations per square kilometre has been found in Ciechocinek (330.6), and among rural communes in Stegna (31.8). In urban locations the density of accommodations reaches the following levels: 55 (Gniew), 50 (Gdańsk), 40 (Pelplin), 25 (Toruń), 20 (Kwidzyn), and between 10 and 20 (Nowe, Bydgoszcz, Grudziądz, Chełmno). Other towns can boast of the indicator below 10 (Tczew, Solec Kujawski, Włocławek), while rural communes note the decrease to 1 and below.

The domination of Ciechocinek (value of 7,259) has also been confirmed by the tourist traffic density indicator (Defert) demonstrating the number of tourists taking advantage of accommodations per 1 km². This indicator appears as much higher especially in locations with a significant density of accommodations: Gniew and Gdańsk (around 2,400), and Toruń (slightly above 2,100). Still, there are some locations without a positive correlation between the density of accommodations and tourist traffic indicator, e.g., Pelplin and Stegna, while in others the situation is the exact opposite, e.g., Chełmno, Tczew, and Nowe. Finally, Schneider's indicator, which reveals the relation between tourists staying overnight and the population of local inhabitants, is most prominent for Ciechocinek again, and for Stegna, Gdańsk, and Gniew. The study of the tourist traffic based on the cluster analysis for all riverside communes suggests that Gdańsk, Bydgoszcz, Toruń, and Ciechocinek constitute a separate cluster due to much higher indicators: Charvet, Beretje and Defert, density of accommodation, and tourism income. The remaining urban and rural communes must be regarded as a distinct cluster, however, Stegna should receive special attention among those.

In terms of rural communes the following clusters have been differentiated: four clusters with two communes, and one cluster with 30 communes. The first of those belongs to Gniew and Nowe – accommodations catering for nearby castles found in major towns in those communes; the next cluster is Dragacz and Wielka Nieszawka – the highest number of hotel accommodations offered to Polish residents; the third is constituted by Osielsko and Tczew found near Bydgoszcz – significant numbers of Polish and foreign visitors; and finally. Stegna commune amounts to an independent cluster – it can boast a high number of tourist in comparison to other rural communes, which is mostly caused by the vicinity of Gdańsk Bay.

The analysis of the selected indicators demonstrated the primacy of Ciechocinek and Stegna in respect of tourist traffic along the Vistula River. Hence, two towns with a dominating spa function, one of which located at the Baltic Sea like the city of Gdańsk, the only other coastal commune under investigation. It may be concluded then that in the lower course of the Vistula River those communes which cannot boast a specific function are not important from the perspective of tourism. The low values of the presented indicators suggest that there is no well integrated tourism product which would encompass all or most of riverside communes.

Tourism Potential of Communes Located in the Lower Course of the River Vistula

In order to assess the tourism potential, a number of variables for 2013 have been selected from the Local Data Bank of the Central Statistical Office. These are supposed to ascertain the tourist-centred attractiveness of specified location in relation to: forest areas, protected areas, number of museums, number of museum goers, number of accommodations, and finally number of domestic and international tourists. R. Wiluś postulates that “the development of tourism on rivers depends on what is found in its vicinity, and the other way around. A waterway is not limited to the river itself, but also its surroundings perceived by the tourist.”²¹ Exactly for this reason, the presented analysis encompasses not only qualities, but also riverside management and the vicinity of the River Vistula. For the purpose of this study this closest area is understood as the riverside communes.

It is postulated here that the tourism attractiveness of riverside communes depends mostly on their qualities and then secondly on the development of tourism.²² In order to verify the suppositions relating to current tourism potential of the River Vistula and its possible applications, the authors decided to resort to multivariable analysis based on the agglomeration methods and *k*-means method. Both of those enabled the identification of cities and towns, and also of communes similar in respect of tourism development. The discussed analysis were conducted separately for urban and for rural locations. Taking into account natural and cultural qualities, e.g., valuable natural areas, monuments, and museums, the following urban and rural riverside clusters have been found:

- city of Gdańsk due to a significant number of monuments, museums, forest areas, and parks (cluster III),
- city of Bydgoszcz as a result of nearly 30% forest coverage, above 6.000 hectares of protected areas, and a substantial amount of parks (cluster IV),
- nine communes (Bobrowniki, Cedry Wielkie, Czernikowo, Grudziądz, Kwidzyn, Osielsko, Solec Kujawski, Wielka Nieszawka, and Zławieś Wielka) due to high percentage of forest areas, e.g., above 80% in the communes of Solec Kujawski and Wielka Nieszawka (cluster I),
- rural communes (Chełmno, Dąbrowa Chełmińska, Dragacz, and Włocławek) as large parts of those are constituted by protected areas (cluster V).

Similarly, clustering allowed dividing rural communes into five groups in relation to potential constituted by tourism, natural, and cultural qualities:

- communes characterised by a large amount of forest areas (Solec Kujawski, Osielsko, Bobrowniki, Czernikowo, Obrowo, Sadlinki) as well as recreational parks (Tczew, Solec Kujawski) (cluster I),
- separate cluster constituted by a single commune of Wielka Nieszawka due to the highest percentage of forest areas (89%) in the whole study (cluster IV),

²¹ R. Wiluś, *Od szlaku wodnego do nadrzecznego regionu turystycznego – kilka uwag o roli rzeki w kształtowaniu regionu turystycznego*, in: *Rewitalizacja drogi wodnej...*, t. III, p. 51.

²² A. Czarnecki, M. Luc, A. Lewandowska-Czarnecka, *Waterway Contributions to Ecological European Tourism and Interregional Economy: Example of West-East Inland Route in Poland*, “Journal of Agricultural, Food, and Environmental Sciences” 2007, Vol. 1, Issue 1, www.scientificjournals.org/journals2007/j_of_agri.htm.

- communes with the highest share of protected areas (Chełmno, Dąbrowa Chełmińska, Dragacz, Włocławek) (cluster V),
- communes characterised by tourism and cultural qualities measured in the amount of monuments (Nowe, Stegna, Miłoradz) (cluster III),
- the remaining 22 communes with varied tourism qualities (cluster II).

Conducting the analysis of the development of tourism in the studied communes proves that the distribution is uneven and concentrated around towns and cities. On the basis of data obtained from the Local Data Bank (2013) it is estimated that Gdańsk was characterised with the highest amount of accommodation, namely 115. The remaining locations possess much fewer lodgings: Ciechocinek (39), Toruń (36), Bydgoszcz (25), Grudziądz, Kwidzyn and Włocławek (around 10 in each). Further away from cities and towns, accommodations are scattered and the access to lodgings is much more difficult. Only Stegna, with 68 accommodations, stands against the trend. The rest of communes usually boasts only a handful of places for tourists. Nearly half (43%) of the studied communes does not possess a single registered accommodation. On top of that, it must be clarified that only a scarce group of accommodations caters for tourists travelling on waterways.

As a result of signing an agreement between Chief Executives from six provinces in respect to the development of the E70 waterway, new marinas and quay have been established in Bydgoszcz, Włocławek, and Tczew, and boulevards have been renovated in Włocławek, Toruń, Grudziądz, and Tczew. In addition, the part of the Bydgoszcz Canal, which has a pivotal function in linking the waterways linking the East with the West, has been revitalized together with the quay in the centre of the city, the Mill Island, rowing course at Brdujście, and Plant found near the odl Bydgoszcz Canal (the result of the Reuris EU project). A new port and quay at Grudziądz have commenced,²³ while the crest of the dam in Włocławek is already rebuilt²⁴. Despite all those works in progress, the placement of tourism infrastructure is still uneven when looking at the whole length of the River Vistula.²⁵ According to R. Zamyślewski, author of guides and maps for users of inland waterways²⁶, the lack of the infrastructure for waterways travellers and for tourists is still significant (2011). Those which can be reached are usually newly built or renovated marinas, located in major cities and towns, e.g., Bydgoszcz, Toruń, Grudziądz, Włocławek, and Tczew. Consequently, there is not much that can be found in terms of smaller infrastructure, placed in smaller towns, which would enable safe mooring while sightseeing the neighbourhood.

One of the key factors influencing the development of tourism are tourist routes, which can be perceived as an element of tourism management.²⁷ The studied stretch of the River Vistula

²³ P. Całbecki, *Rzeki dla regionów – czy stać nas na projekty cywilizacyjne?*, „Gospodarka Wodna” 2013, nr 6, p. 205.

²⁴ „Many European cities are falling in with international trends, rediscovering their riverscapes and making use of their waterfront position as a way of distinguishing the attributes they have to offer as a location.” Ch. Hölzer, T. Hundt, C. Lüke, O.G. Hamm, *Riverscapes Designing Urban Embankments*, Birkhäuser Basel, Boston, Berlin 2010, p. 24

²⁵ J. Angiel, *Rzeka Wisła, jej wartości i percepcja. Wisła w edukacji geograficznej*, Uniwersytet Warszawski, Wydział Geografii i Studiów Regionalnych, Warszawa 2011, p. 65.

²⁶ R. Zamyślewski, *Wisła...*, p. 50.

²⁷ A. Kowalczyk, M. Derek, *Zagospodarowanie turystyczne*, Wydawnictwo Naukowe PWN, Warszawa 2010, p. 36.

possesses only one kayak route and one sailing route; however, there are many other kayak routes crossing or joining it: Brda, Noteć, Drwęca, Wda, Zgłowiączka, Osa, Liwa, Wierzyca, and Maława. Bydgoszcz Water Junction functions as an important node in the development of Polish waterways due to the fact that many national tourist, sailing, and kayak routes cross and meet here: *Wielka Pętla Wielkopolska* (688 km), *Pętla Toruńska* (487 km), *Pętla Kujawska* (269 km).²⁸ Along the River Vistula other routes are established: biking routes, black biking route prepared by the Association for the Lower Vistula Friends (*Towarzystwo Przyjaciół Dolnej Wisły*) and the Vistula Route (*Szlak Wisły*) coordinated by *Urząd Marszałkowski Województwa Kujawsko-Pomorskiego*. The last route is intended to run along the whole length of the Vistula River. On top of those there are additional walking paths adjacent to the lower Vistula River; however, these are usually shorter in distance.

For tourists travelling by land, discovering the river and its surroundings depends on the access to various means of crossing waterways. The studied region is characterised by 10 bridges, one of those atop the dam in Włocławek, and 4 ferries operating only in peak seasons. It must be stated that despite the obvious transportation function, ferries are mainly an attraction for tourists. Another issue worth mentioning is the distance between bridges, which is important from the perspective of a tourist. The average stretch between bridges in the lower course of the River Vistula amounts to 40 km.²⁹

The spatial distribution of tourism infrastructure found in the riverside communes has been described on the basis of selected variables found in the Regional Data Bank (2013). Those variables include the number and quality of facilities supporting water tourism, accommodations, as well as data concerning the length of biking routes. Conducting the cluster analysis of both urban and rural communes the following facts have been observed:

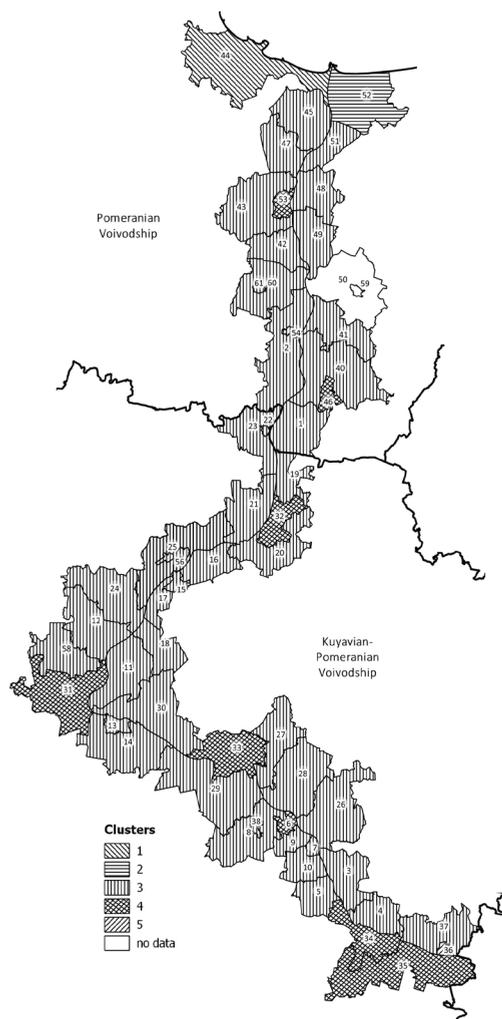
- separate clusters are constituted by Gdańsk (accommodations, ferry, quay), Stegna commune (accommodations, ferry), Dobrzyń nad Wisłą (port and sailing club),
- the last cluster encompasses the remaining cities and towns with developed accommodation access (Bydgoszcz, Toruń, Ciechocinek, and Grudziądz) and facilities catering for the needs of water tourists (Włocławek, Tczew, Ciechocinek) (Figure 1).

The analysis of the riverside rural communes, from the perspective of the development of tourism infrastructure, does not bare resemblance to the joint analysis of urban and rural locations. The investigation has been concluded with describing five clusters differentiated by characteristic features:

- cluster I – Stegna, usually regarded as a touristy commune, is the only to boast two ferries together with the largest number of waterfront facilities and accommodations,
- cluster II – constituted by the rural commune surrounding Włocławek as it possesses two quays,

²⁸ J. Owsiak, J. Sewerniak, *Możliwości użytkowania turystycznego dróg wodnych w Polsce*, Wyższa Pomorska Szkoła Turystyki i Hotelarstwa, Zeszyty Naukowe nr 2, Bydgoszcz 2002, p. 81; R. Zamyślewski, *Bydgoski Węzeł Wodny. Album map dla wodniaków. Przewodnik po polskich drogach wodnych*, Stowarzyszenie na rzecz Turystyki Aktywnej, Rekreacji i Wypoczynku „Szkoła Przygody”, Bydgoszcz 2012, p. 6.

²⁹ *Strategia rozwoju – Wisła. Województwo Kujawsko-Pomorskie*, Zarząd Województwa Kujawsko-Pomorskiego, Toruń, p. 2.



1 – Sadlinki, 2 – Gniew, 3 – Bobrowniki, 4 – Fabianki (part 2), 5 – Lubanie, 6 – Ciechocinek (urban), 7 – Nieszawa (urban), 8 – Aleksandrów Kujawski, 9 – Raciążek, 10 – Waganiec, 11 – Dąbrowa Chełmińska, 12 – Dobrcz, 13 – Solec Kujawski (urban), 14 – Solec Kujawski, 15 – Chełmno (urban), 16 – Chełmno (part 1), 17 – Chełmno (part 2), 18 – Unisław, 19 – Grudziądz (part 1), 20 – Grudziądz (part 2), 21 – Dragacz, 22 – Nowe (urban), 23 – Nowe, 24 – Pruszcz, 25 – Świecie, 26 – Czernikowo, 27 – Lubicz, 28 – Obrowo, 29 – Wielka Nieszawka, 30 – Zławieś Wielka, 31 – Bydgoszcz (urban), 32 – Grudziądz (urban), 33 – Toruń (urban), 34 – Włocławek (urban), 35 – Włocławek (part 2), 36 – Dobrzyń nad Wisłą (urban), 37 – Dobrzyń nad Wisłą, 38 – Aleksandrów Kujawski (urban), 39 – Świecie, 40 – Kwidzyn, 41 – Ryjewo, 42 – Subkowy, 43 – Tczew, 44 – Gdańsk (urban), 45 – Cedry Wielkie, 46 – Kwidzyn (urban), 47 – Suchy Dąb, 48 – Lichnowy, 49 – Miłoradz, 50 – Sztum, 51 – Ostaszewo, 52 – Stegna, 53 – Tczew (urban), 54 – Gniew (urban), 56 – Świecie (urban), 57 – Świecie, 58 – Osielsko, 59 – Sztum (urban), 60 – Pelplin, 61 – Pelplin (urban).

Figure 1. Similarities between riverside communes in the Kuyavia-Pomerania and the Pomerania Provinces in respect to development and arrangement of tourism infrastructure in 2013 (cluster analysis)

Source: the authors' analysis conducted on the basis of the data obtained from the Local Data Bank (2013).

- cluster III – encompasses four rural communes connected to riverside towns: Chełmno, Dąbrowa Chełmińska, Lubicz neighbouring Toruń, and Raciążek, as these are characterised by a large number of biking routes amounting per 10,000 km²,
- cluster IV – groups 25 rural communes with underdeveloped tourism infrastructure
- cluster V – the last cluster caters for the communes with a higher number of accommodations, which at the same time surround the largest city of the region, Bydgoszcz (Dragacz, Osielsko, and Wielka Nieszawka communes), and smaller towns with interesting heritage, e.g., Tczew and Gniew.

As expected, the study has demonstrated a strong polarity between urban and rural riverside communes in terms of current tourism potential and also of the development of tourist facilities. Such a state is a direct result of socio-economic processes characterising investigated units: economic specific character, income, and expenditure on investments into developing tourism. Even though cities under scrutiny are described by indicators demonstrating readiness to develop tourism on the basis of Vistula River and its potential, it must be stated that a number of rural communes are embracing the idea of promoting and developing of various form of tourism, including water tourism.

Features of tourism movement in the lower course of the River Vistula

Rivers “are often positioned as an attraction, which contribute to the aesthetics of a destination and the quality of the tourism experience.”³⁰ However, in tourism, rivers are primarily utilised as waterways. The relation between tourism and rivers is much wider as it stretches beyond river banks. The development of tourism related to rivers must be perceived more holistically by linking rivers with their valleys into one coherent structure tourist-river.³¹ For this reason the volume of tourist traffic was calculated on the basis of numbers relating to rivers and also to their surroundings. Those figures can be established due to statistical data relating to lockages performed near the River Vistula. In relation to the studied area those locks are found on Nogat: Biała Góra, Szonowo, Rakowiec, and Michałowo. The number of tourists calculated from the number of shipped vessels in 2006 varied between 163 (Michałowo) and 215 (Biała Góra). The traffic in the case of each lock is quite similar, which may suggest that most vessels – mainly sailing boats carrying tourists – cover the whole distance of the waterway towards *Zalew Wiślany* (the Vistula Lagoon) or via *Kanał Jagielloński* (Jagiellonian Canal) to Elbląga and later towards *Pojezierze Iławskie* (the Lake District of Iława).³² A similar number of crafts is registered at the Bydgoszcz Canal, where up to 150 small vessels moor each season.³³

³⁰ L. de Witt after Prideaux *et al.*, 2009; Jones *et al.*, 2006; Bogdanovitz & Martinac, 2007, p. 3

³¹ R. Wiluś, *Nadrzeczna przestrzeń turystyczna*, „Turyzm” 2007, nr 17/1–2, Wydawnictwo Uniwersytetu Łódzkiego, p. 133; R. Wiluś, *Od szlaku wodnego...*, p. 51.

³² R. Wasil, *Rewitalizacja szlaków wodnych Delty Wisły i Zalewu Wiślanego*, in: *Rewitalizacja drogi wodnej Wisła–Odra szansą dla gospodarki regionu*, t. I, *Przyroda i turystyka regionu Pomorza i Kujaw*, ed. Z. Babiński, Urząd Marszałkowski Województwa Kujawsko-Pomorskiego, Instytut Geografii UKW, Bydgoszcz 2008, p. 56.

³³ R. Zamyślewski, *Bydgoski Węzeł Wodny, Album map dla wodniaków. Przewodnik po polskich drogach wodnych*, Stowarzyszenie na rzecz turystyki aktywnej, rekreacji i wypoczynku „Szkoła Przygody”, Bydgoszcz 2012.

The waterways found at the delta of the River Vistula are quite satisfactory for water transportation, hence, the size of traffic is assessed at nearly 1,000 small crafts for tourists and nearly 500 vessels carrying goods and passengers. The data reflects the state of affairs in the first years of the 21st century.³⁴ However, a bulk of those crafts is constituted by yachts and motorboats transported from the Gdańsk Bay to *Zalew Wiślany* and towards *Pojezierze Iławskie*. As a result, there cannot be many tourists travelling towards E70 waterway in those numbers. Finally, at Bydgoszcz Canal the average lockage number for 2006 surpasses 1,400, and the lock found in Czersko Polskie has been used around 1,100 times.³⁵ A constant growth of the traffic at *Zalew Wiślany* may have a positive impact on the amount of tourism movement on the River Vistula. This will come as a result of the programme devoted to “Economic Revitalization of the Delta of the Vistula River and of the Vistula Lagoon” (*Programu rewitalizacji gospodarczej obszaru Delty Wisły i Zalewu Wiślanego*) and its supplementary project “Loop of the Vistula Delta – International Waterway E70” (*Pętla Żuławska – Międzynarodowa Droga Wodna E70*). In addition, the growing water tourism at the Gdańsk Bay may also translate into the increase in the volume of tourist movement on the Vistula River.

The towns and cities of the lower course of the Vistula River, just like rural areas in the vicinity, can boast significantly larger numbers of tourists. This view is supported by the data reflecting the usage of accommodations. Various places offering lodgings are visited by thousands (Nowe, Pelplin, Świecie, Wielka Nieszawka) or even hundreds of thousands visitors in towns and cities (Gdańsk, Toruń, Bydgoszcz, Ciechocinek), but even in rural communes the numbers grow from a dozen to a few thousand. However, twenty communes did not register a single usage of offered accommodations.

The analysis of types and forms of tourism in riverside locations requires taking into account both water tourism and land travels along rivers.³⁶ Tourism qualities and development in the lower course of the River Vistula make sightseeing of primary importance as tourists flock to major cities and towns of the region. Even though these are located near the River Vistula, usually excursions are not related to the river itself. Culture tourism is also developing in the lower Vistula region, this time on the basis of: not so popular military facilities, e.g., the fortifications around Chełmno;³⁷ qualities of waterside infrastructure; industrial monuments, e.g., the Bydgoszcz Canal together with the unused Old Bydgoszcz Canal, lock in Białą Górą, the historic bridges in Bydgoszcz and Grudziądz, and the long span lattice-truss bridge in Tczew considered by the American Society of Civil Engineers as a monument of heritage matching that of the Eiffel Tower or the Suez Canal. Another interesting location found at *Żuławy* is known as Little Holland due to the highest density

³⁴ R. Wasił, *Rewitalizacja szlaków wodnych...*, p. 55.

³⁵ M. Gorączko, *Natężenie ruchu żeglugowego na bydgoskim odcinku drogi wodnej E-70 – stan obecny i perspektywy rozwoju*, in: *Rewitalizacja drogi wodnej...*, p. 30.

³⁶ R. Wiluś, *Od szlaku wodnego...*, p. 51.

³⁷ R. Gonia, T. Budzyński, *Twierdza Chełmno. Przewodnik turystyczny*, Towarzystwo Przyjaciół Dolnej Wisły, Świecie 2012.

of waterways network with unique technical and hydrological monuments. This region is second depression located in a river delta surpassed only by the River Rhine.³⁸

An even dispersion of major urban centres along the River Vistula is characteristic for Kujawy-Pomerania Province. There are both the important centres such as Bydgoszcz, Toruń, Grudziądz, Włocławek, Chełmno, Świecie, Nowe, and Ciechocinek, as well as smaller but significant from the perspective of tourism towns of Tczew, Kwidzyn, Gniew, and Pielplin. This enables the development of the cultural product based on the tourism potential of all those locations with the River Vistula functioning as an axis joining them together, e.g., by providing guided cruises along the river, with sightseeing tours in urban and rural areas, where cultural and natural resources can be appreciated.³⁹

Another feature growing in popularity are festivals promoting tourism qualities of the River Vistula and riverside locations, e.g., *Ster na Bydgoszcz* – the largest water festival in Europe; numerous Vistula festivals, e.g., *Obchody Pomorskiego Święta Wisły* held at the Tczew, Kwidzyń, and Sztum communes; sports events concentrating around rowing boats, e.g., *Wielka Wioślarska o Puchar Brdy* or men's eight regattas, both organised in Bydgoszcz.

On top of those events, specialised tourism is represented by biking as travellers are provided with long-distance and well-marked routes running along the River Vistula. In addition extreme sports gain in importance, e.g., paragliding at Starogród nad Wisłą. In this respect water tourism still seems underdeveloped. It is lacking in the low class of waterways, average water quality, insufficient amount of waterways designed for tourists, missing facilities designed specifically for water tourists, e.g., marinas, accommodations, access to restaurants, etc. It seems that the negative stereotype of the river has a strong impact on the situation, as the Vistula is often perceived as dirty, uninteresting, and dangerous. As mentioned before, the majority of Polish waterways can be accessed only by small vessels; hence, domestic inland water transport accounts barely for 0.7% of the total goods transport in the country⁴⁰ and even less in relation to passenger.⁴¹

Sailing and kayaking, as forms of tourism, are also far from benefiting from the potential provided by the river. Floating down the whole length of the Vistula is still considered as a considerable achievement. The situation is slightly better in terms of transporting passengers; however, it is still far from satisfactory even though the slow process of the development must be attributed to both state and private initiatives. Taking care of passengers is most prominent in urban areas and in the delta of the River Vistula. Among the available options one can list: cruises in Bydgoszcz, e.g., aboard the only European solar water-tram *Słonecznik* (Sunflower) carrying above 40,000 passengers every year;⁴² cruises on a historic water-tram called *Bydgoszcz*; cruises up the river aboard *Wanda* and *Wiking* in Toruń, and ferry crossings on a motorboat known as *Katarzynka* (a name of a gingerbread type traditionally produced in Toruń); and other cruises near Ciechocinek or on Włocławek Reservoir.

³⁸ M. Kamiński, *Wisła 1047 tajemnic*, Fundacja Marka Kamińskiego, Gdańsk 2010.

³⁹ According to J.M. Zaninetti (2014, p. 20), even the “river itself can be turned into a tourist attraction.”

⁴⁰ T. Jarzębińska, op.cit., p. 15.

⁴¹ M. Gorączko, *Natężenie ruchu żeglugowego...*, p. 28.

⁴² www.tramwajwodny.byd.pl (15.09.2014).

The long-distance journeys on the river are scarce to say the least.⁴³ Fortunately, some Polish companies have started chartering boats on European waters, e.g., Holland, Germany, France, Italy, Ireland, Belgium, England, and Scotland, and finally in Poland as well. Still, the bulk of Polish water trips is confined to the waterways of the Mazury Lakes, the River Oder, the Gliwice Canal, the Augustów Canal, the Elbląg Canal, and then *Pętla Żuławska*, even though it is possible to rent boats for trips in the lower course of the River Vistula between Bydgoszcz and Toruń or even up North to *Żuławy*.⁴⁴ In terms of specialised tourism, it is worth mentioning kayaking trips within the Bydgoszcz–Toruń Metropolitan Area or the two-week long International Kayaking Rally Drwęca–Wisła which became one of the largest European events of the sort. The whole journey takes tourists on a voyage from Brodnica, via Golub-Dobrzyń, Toruń, Bydgoszcz, till they reach Chełmno.⁴⁵ The promotion of water tourism is supported by the various badges such as *Szlak Wisły 941.3 km* (the Vistula Trail) established in 2009 by *Centrum Turystyki Wodnej* (the Water Tourism Centre), a division of *Polskie Towarzystwo Turystyczno-Krajoznawcze* (the Polish Tourist and Sightseeing Society). The aims of the badge can be enumerated as the promotion of: the qualities of the River Vistula, water tourism, and familiarising tourists with the infrastructure and facilities found along the river.⁴⁶

It is also more common to see the development of barging, which is quite common in the West European countries such as e.g. Germany and Holland. In Poland it is better known as *barking*, and it simply refers to travelling by barges or various house-boats down rivers, canals, and lakes.⁴⁷ In terms of safety, this seems to be an optimum manner of travelling on the River Vistula especially when families with children are taken into consideration. It can also be perceived as an interesting alternative to yachting, which requires certificates and significant experience when sailing on a river of such a magnitude as the Vistula. In comparison, the revised legislation allows barging without certificates. Advantages of barging are numerous ranging from comfort and safety, which is the result of a slow pace of travelling. Barging has already influenced water tourism in Poland as the number of mooring locations has increased, and this enables sightseeing of the neighbourhood.

The recreational tourism in the vicinity of the lower course of the River Vistula is mostly present around the Włocławek Reservoir and in the commune of Stegna. The systematic growth of water quality in the River Vistula, especially from the border of the Mazovia Province to Toruń,⁴⁸ should have a positive influence on the development of recreational tourism along the whole stretch of the lower course of the river. In addition to everything mentioned so far, angling is also growing in popularity, especially at the Włocławek Reservoir. It is also possible to recall here the long

⁴³ Though „cruises are constantly increasing worldwide and represent an attractive form of contemporary tourist travel”. N. Vuksanović, T. Pivac, A. Dragin, *Contemporary Trends in Nautical Tourism on the Example of European River Cruising Companies*, Researches Reviews of the Department of Geography, Tourism and Hotel Management, 2013, No. 42, p. 124.

⁴⁴ www.barki.pl, www.barki.velmundi.pl (15.09.2014).

⁴⁵ I. Sulimowicz, op.cit., p. 64.

⁴⁶ www.pttk.pl/zycie/imprezy/Kalendarz_Wodniakow_2014.pdf, www.polskieszlakiwodne.pl (15.09.2014).

⁴⁷ R. Zamyślewski, *Bydgoski Węzeł Wodny...*, p. 56.

⁴⁸ Z. Brenda, op.cit., pp. 213–216.

traditions of spa tourism, e.g., in Chiechocinek located near the Vistula River. As data analysis suggests, this town may function as an important pivot in generating tourism movement towards other riverside regions.

Summarising the above mentioned arguments relating to the size, type, and forms of tourism movements at the lower course of the Vistula River, it becomes possible to distinguish main tourist centres, namely the cities. In this case we must speak about educational tourism, which usually has no connection to the river. There are also some smaller local centres with a significant tourist traffic with well develop facilities. Tourists are drawn to those towns and communes mainly due to important monuments, e.g., Gniew with its Teutonic Knights' castle. Unfortunately, the Vistula Valley lacks small villages which would cater for tourists with basic tourist facilities like resorts, bungalows or campsites, and marinas.

Conclusions

The objective of this paper is to demonstrate the tourism potential of the communes located in the valley of the River Vistula while focusing on the possibility of grounding the development of water tourism on their example. Additionally, the authors have tried to demonstrate various revitalisation enterprises which aim at turning the river into a tourist hub. In the course of the analysis it has been discovered that the River Vistula is usually treated as an addition to other offers presented to tourists. It can be stated that tourism in the riverside communes does not relate directly to the river, but rather concentrates in towns and cities accidentally located at Vistula. Nowadays, the river is finally promoted as possessing an immense potential to be utilised in numerous manners. Finally, it is perceived as a significant factor in the development of tourism in riverside communes as well as the whole province.

This tourism potential is, however, extremely uneven at the whole studied span of the Vistula. To some extent such state can be explained by the specific arrangement of cities and towns versus small rural communes. Conducting the analysis has enabled reaching the conclusion that it is the largest centres together with a handful of more touristy communes, e.g., Stegna, Ciechocinek, and Gniew which dominate the whole region. It is those few locations that offer a diversified tourism product.

It has been postulated that the possibility of utilising the potential of riverside communes lies in the resourceful application of water transport on the basis of the international waterway E70. An asset which should be considered is the limited transport of goods on one hand, and the direct link to Western Europe via rivers and canals. Those two factors together may generate a substantial tourism movement.

Currently, the potential of the lower course of the River Vistula is mostly driven towards education tourism as well as active leisure, especially biking in rural areas. Revitalisation together with the promotion of the Vistula as the E70 waterway gradually develop into, mainly, the water-related tourism. This fact can help the communes unable to compete with the potential of other locations characterised by a high numbers of attractions. Through the process of revitalisation

of waterways some communes can focus on the tourism movement and water tourism, e.g., by supporting tourist traffic, sailing or barging.

It cannot but be emphasized how important it is to raise the awareness of local inhabitants about the potential provided by the river, and how this potential can be utilised. Local and regional authorities must be included in that perspective.⁴⁹ The cooperation between the authorities of riverside communes has already been functioning. The declaration of mutual action signed by the Chief Executives from six provinces establishes the grounds for a far-reaching collaboration in respect of developing goods and tourist transport of the whole E70 waterway while retaining its core natural qualities.⁵⁰ Undoubtedly such an approach may have a strong impact on the socio-economic development of the regions located in the vicinity of the waterway as the influx of tourists translates directly into higher incomes and increased employment.

When listing major obstacles, the class of waterways must be mentioned at the beginning of the list together with the insufficient development of facilities necessary of water tourism. In respect of active leisure on land, one must refer to the scarcity of various ways of crossing rivers. In addition the majority of offered accommodations is located at cities and towns, away from rural areas of the riverside.

Eventually, the authors have stressed the fact that, due to the poor characteristics of the River Vistula seen as a waterway, and because of no perspectives of immediate development of water transportation system, the revitalisation of the River Vistula becomes of prime importance. It should be adapted to the needs of tourism movement. In the lower course of the river it is barely possible to see a coherent tourism product offered in relation to the Vistula. There is no integrated plan proposing a comprehensive utilisation of the river in a wider tourism perspective.

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⁴⁹ In many European countries there function programmes which integrate local communities and local governments for the sustainable development of riverside areas – in Belgium – Contrat de Rivieres (http://environnement.wallonie.be/contrat_riviere/contrats.htm), in France – Contrat de Milieu (www.gesteau.eaufrance.fr/presentation/contrat).

⁵⁰ www.mdwe70.pl (15.09.2014).

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POTENCJAŁ TURYSTYCZNY GMIN NADWIŚLAŃSKICH WOJEWÓDZTWA KUJAWSKO-POMORSKIEGO I POMORSKIEGO W KONTEKŚCIE REWITALIZACJI DRÓG WODNYCH

SŁOWA KLUCZOWE

Wisła, turystyka, Międzynarodowa Droga Wodna E70

STRESZCZENIE

Celem artykułu jest określenie potencjału turystycznego gmin nadwiślańskich jako czynnika aktywizacji społeczno-gospodarczej obszaru i zbadanie wpływu rewitalizacji Wisły na rozwój turystyki, w tym poprawę możliwości turystycznego użytkowania rzeki. Jako obszar badawczy przyjęto gminy i miasta położone bezpośrednio nad dolną Wisłą w obrębie województwa kujawsko-pomorskiego i pomorskiego. W artykule założono, iż obszar dolnej Wisły posiada niezbędny potencjał (naturalny i kulturowy) do rozwoju różnych rodzajów i form turystyki. Rozwój ten uwarunkowany jest stanem zagospodarowania turystycznego oraz sytuacją społeczno-ekonomiczną gmin (zwłaszcza w zakresie ponoszonych wydatków na turystykę). Ważnym czynnikiem wspierającym rozwój turystyki jest realizacja ogólnej koncepcji zrewitalizowania odcinka dolnej Wisły, jako fragmentu w szczególności Międzynarodowej Drogi Wodnej E70. W celu wychwycenia podobieństwa w potencjale turystycznym gmin badanego obszaru zastosowano analizę wielozmienną w postaci analizy skupień metodą k-średnich, wyliczono również odległości euklidesowe dla każdej jednostki administracyjnej, po uprzednim zestandaryzowaniu danych.

THE SELECTED ASPECTS OF TOURISM DEVELOPMENT – AN EXAMPLE OF THE ŚWIĘTOKRZYSKIE PROVINCE

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ABSTRACT | Tourism belongs in to the most important elements of multifunctional development of rural areas. The main goal of this study is to assess conditions for tourism development with special emphasis on demographic, economic and infrastructural processes. The study has been based on the data from the Local Data Bank of the Central Statistical Office of Poland and focused on the period of 2002–2012. The area of the study the rural areas of the Świętokrzyskie Province.

Introduction

Tourism is commonly considered a phenomenon of the 20th and 21st century. In both highly developed and developing countries it is associated with the strong influence on the income of

a country and improvement of economic conditions on regional and local levels.¹ Presently, the percentage of agricultural production in the economy of rural areas is decreasing, overridden by non-agricultural production and consumption, e.g. sharing natural environment (tourist and recreation services).² Tourism is an excellent tool stimulating economic growth and social development. It is also considered to be an interdisciplinary branch of economy with multi-sector relations. The importance of tourism for generating regional influences and employment is all the more visible as employment opportunities in agriculture are decreasing.³

The goal of this study is to assess the selected socio-economic aspects affecting tourist function development in the rural areas of the Świętokrzyskie Province. The author analyses 97 communes covering the area of 11,042 km² with the population (in 2013) of 700,445 inhabitants, which amounted to 94% of this province's area and 55.20% of the entire province's population. The study is based on the statistical data of the Central Statistical Office of Poland for the period of 2002–2012. Despite the imperfections of the statistical data on tourism as provided by the Central Statistical Office of Poland, its comprehensiveness as a source of information on the tourist traffic and accommodation in Poland is an advantage. The study applies the analyses of indices including tourist accommodation density index (number of bed places in tourist accommodation per 1 km² of the total area), the Defert index – tourist function index (number of tourists accommodated per 1 km² of the total area) and the Schneider index – tourist traffic intensity index (number of tourists accommodated per 1,000 permanent residents). The indices are commonly used in the studies on tourist function. They have been used by such authors as Warszzyńska [1985], Chudy-Hyski [2006], Żek [2008], Szromek [2012]. The Perkal index has been used as a synthetic measure for identifying the tourist function and differentiation of demographic and economic potential.

Studies on the relations between tourist function and socio-economic development have been more intense from the 1970s on. From that time on numerous concepts and academic analyses of the subject appeared in the literature on the subject. In Poland the impact of tourism on selected aspects concerning socio-economic level has been discussed, among others, by A. Jackowski (1981). Regarding the latest studies, the one by R. Faracik (2006) is worth mentioning; he developed the spatial typology of communes from the Krakow suburban zone according to the structure of the tourist function. D. Chudy-Hyski (2006) examine the relation between the level of tourist function development of an area and the effectively operating – within its administrative borders – legally protected areas. A. Szwichtenberg (2006) describes the significance of tourist function of seaside communes in Poland with respect to other economic functions. Possible ways of the tourist function development have been discussed in the studies by B. Górz (2007). The subject

¹ A. Tucki, *Regionalne aspekty rozwoju turystyki na przykładzie województwa lubelskiego*, in: *Studia nad turystyką. Prace geograficzne i regionalne, Geograficzne, społeczne i ekonomiczne aspekty turystyki*, Instytut Geografii i Gospodarki Przestrzennej, Uniwersytet Jagielloński 2007, p. 267.

² M. Kłodziński, *Główne funkcje polskich obszarów wiejskich z uwzględnieniem dezagraryzacji wsi i pozarolniczej działalności gospodarczej*, „Studia BAS” 2010, No. 4 (24), p. 9.

³ Majewska I., *Kierunki rozwoju turystyki na obszarach wiejskich w nowej perspektywie finansowej Unii Europejskiej*, in: *Turystyka wiejska bez granic*, ed. C. Jastrzębski, Wyższa Szkoła Ekonomii, Praw i Nauk Medycznych w Kielcach, 2015, p. 39.

of analysis of tourist function development is continued by such authors as A.R. Szromek (2012) and M. Durydiwka (2007, 2012).

Owing both to the changes in the 1990s economy and dynamic growth of service sector, studies on the innovation in services, including tourism, have become more important. In Poland, after the transformation and the introduction of free market economy, the subject of innovative concepts of agritourism management has been covered – among others – by M. Woźniak (2010). He claims that the market success of agritourism farms not only depends on product elements but is mostly affected by the features that make a particular farm easily accessible and unique. It requires a new approach to management and innovation. Innovations in tourism is also discussed by K. Krzyżanowska (2013). The question of innovation in rural area tourism has also been described by A.J. Parzonko (2013), with the presentation of the agricultural advisory.

The subject of agritourism has been popular and analysed for many years. In the Świętokrzyskie Province the group of authors who have discussed it includes I. Janowski (2004), E. Pałka (2007), W. Kamińska, M. Mularczyk (2010), W. Kamińska, E. Pałka-Łebek (2009), W. Kamińska, Piwońska E. (2009), I. Kiniorska, J. Wrońska-Kiczor (2010), D. Puciato, B. Woś (2011).

Area of the study

The Świętokrzyskie Province comprises an Eastern Poland area which, due to its peripheral character, has to face numerous negative social and economic phenomena. The majority of the area in question coincides with the Świętokrzyski National Park and Landscape Parks of the Świętokrzyskie Mountains. The legal restrictions concerning locations for infrastructural investments on legally protected areas are sources of conflicts between park officers, ecologists and investors. The place of infrastructural investments influences living conditions and transforms the natural environments, not necessarily in a positive way. The area of the Świętokrzyskie Province is functionally diversified. Apart from agricultural function, another important element is economic activity connected with the concentration of extractive industry (mining) and raw materials processing, including limestone for cement and lime industries. It is represented by huge – on the national level – companies, i.e. „Morawica” Limestone Quarry (Kopalnia Wapienia „Morawica”), Dyckerhoff Cement Plant and „Trzuskawica” Limestone Processing Company (Zakłady Przemysłu Wapienniczego „Trzuskawica”, Sitkówka-Nowiny).

One of the most characteristic places of the environmental transformation associated with raw materials extraction is the Sitkówka-Nowiny commune. Its western part is a fragment of the Chęciny–Kielce Landscape Park where agricultural and natural landscapes prevail. In the central and eastern parts where the increasing volumes of carbonate raw materials are extracted for construction industry, industrial landscape is the dominant type. The most interesting area with respect to geology and extraction of raw materials is the surrounding area of Kowala (the eastern part of the commune) where two landscape types can be distinguished. The first one is the extraction-related (mining) landscape associated with the current extractive activities in numerous existing companies (mine workings, mine-waste tips, overburden removings, haul roads). The second one

is the post-extraction (post-mining) landscape,⁴ where the extraction of raw materials has been finished (old excavation voids and waste-dumps). As the literature on the subject shows, the Świętokrzyskie Province is not counted as a major tourist region in Poland. However, its tourist function can be developed in some of its parts, either as the dominant or an additional function. In order to encourage tourists to visit certain places, tourist attractions – natural environment, landscape and cultural – are necessary. Afforestation is a major attraction of the area in question – the Świętokrzyski National Park (Świętokrzyski Park Narodowy). In the Świętokrzyskie Province there are numerous iron smelting facilities from the Roman period. Industrial tourism encourages learning and education and can play a key role in cultural education.

Socio-economic conditions

Tourism and leisure activities can be of basic, supplementary or marginal importance to the economic development of the said area. Its role in a local economy is defined not only by tourist values and the development of tourist facilities and tourist traffic but also social and economic potential. The impact of human factor on the development of rural and urban areas is beyond question. It is expressed by the demographic potential and economic activity of a given region. In the period of 2002–2012 the population of rural areas dropped 0.5 per cent to 701.8 thousand inhabitants from 702.8 thousand. The most significant changes in population (fall) have been recorded in the southwestern part of the province. However, rural areas located mainly in the vicinity of the province's capital city grew in population (e.g. Morawica, Miedziana Góra, Sitkówka-Nowiny).⁵

By means of applying the Perkal synthetic index, areas of diversified demographic potential have been recognised in the Świętokrzyskie Provinces. The highest class is composed of two communes: Morawica and Miedziana Góra. The high demographic potential is the feature of the communes located in the vicinity of the province's capital city (positive migration rate). It is also visible in rural areas surrounding subregional centres: Busko Zdrój, Połaniec. Unfavourable demographic conditions have been recorded in the southern and southwestern parts of the province – the areas of advanced depopulation. These areas are associated with traditional agriculture and have peripheral location to urban centres. The concentration of demographic potential on relatively small areas causes a development imbalance between rural areas. The decreasing population, due to the negative migration rate, is correlated with the negative rate of natural increase and unfavourable age structure of the population remaining in its place of residence, because migrations are selective and refer to younger and better educated parts of the population, which negatively affects entrepreneurship, innovations as well as the social activity of persons not leaving their

⁴ J. Nita, *Kamieniołom w krajobrazie i geoturystyce*, in: *Krajobraz a turystyka*, ed. Andrejczuk, Prace Komisji Krajobrazu Kulturowego PTG, nr 14, Sosnowiec 2010, pp. 243–51.

⁵ I. Kiniorska, *Potencjał rozwojowy obszarów wiejskich woj. świętokrzyskiego a polityka spójności*, „Studia KPZK PAN” 2014, t. CLVI, p. 360.

place of residence.⁶ Migration studies have for long shown that one of its features is the fact that migrating persons leave areas with unfavourable conditions in order to satisfy such needs as having interesting and well-paid jobs, access to public services, better housing conditions, etc. Therefore, migrations from more distant rural locations to suburban zones are classic spatial movements described by migration models using the analysis of attracting (pull) and discouraging (push) factors. Migrations from urban to suburban zones are also typical to populations with increasing wealth and those searching for better living conditions – dwellings located far from noise and pollutions, with more space, with a garden, etc.⁷

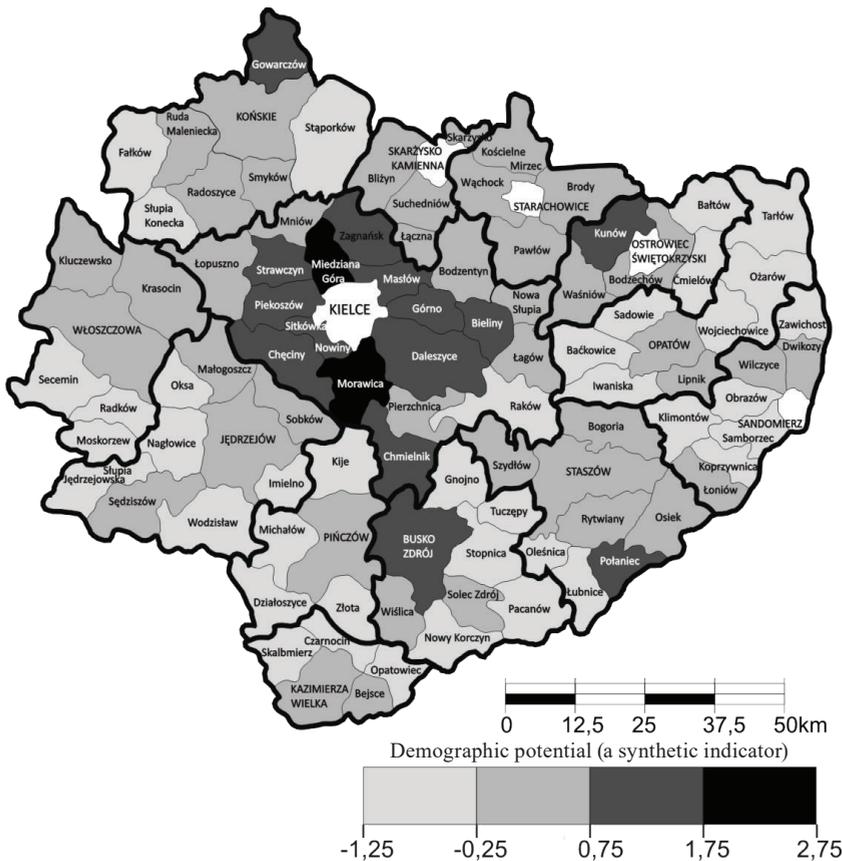


Figure 1. Demographic potential of rural areas of the Świętokrzyskie Province in 2012

Source: the author's own calculations based on data from the Central Statistical Office of Poland.

⁶ A. Miszczyk, *Kapitał ludzki i społeczny w procesie rozwoju obszarów wiejskich woj. lubelskiego*, „Studia KPZK” 2010, t. CXXVI, p. 152.

⁷ A. Rosner, *Zróżnicowanie przestrzenne obszarów wiejskich a pożądane kierunki ich rozwoju*, „Studia KPZK” 2011, t. CXXXIII, p. 40.

In the transformation period rural areas differ in adaptation levels for market economy and new social and political conditions. Differentiation of development potential and the utilisation rate of advantages of a particular area have a huge impact on the demographic, spatial and functional structure of rural areas (Kiniorska 2009: 31).

The analysis of the economic potential has shown important spatial diversities. It took into account such features as the unemployment rate, entrepreneurship rate, income per capita, percentage of persons using sewage and water supply system. The economic potential has been observed in relatively small areas (Figure 2).

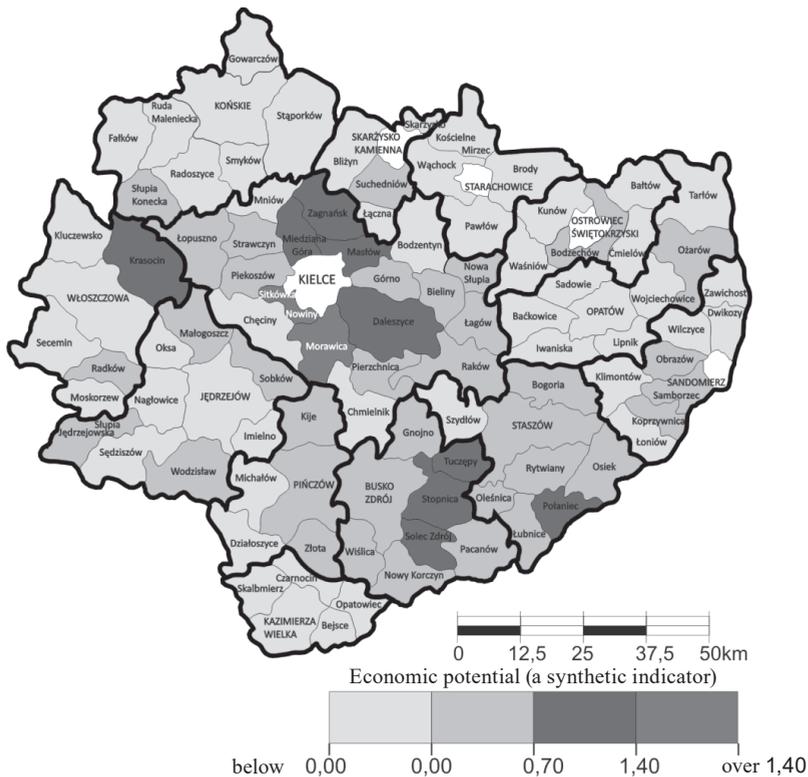


Figure 2. Economic potential of rural areas of the świętokrzyskie Province in 2012

Source: author's own calculations based on data from the Central Statistical Office of Poland.

These are rural areas with specialised industrial or services functions. The concentration of socio-economic potential on a relatively small area leads to the extended inequalities in development. Functional structure of the area and its character (the Świętokrzyskie Mountains – 67% of their area with the legally protected natural values) affect the investments and development including tourism.

Diversification of tourist function in rural areas

Currently, the socio-economic development of rural areas is a broad category including not only the diversification of rural economy (i.e. simultaneous economic functions of rural areas – targeting and achieving multi-functionality of rural areas), economic activation of rural population connected with stimulating local entrepreneurship and attracting external investments, but also improving living conditions and the quality achieved by maintaining natural and cultural values.⁸ Numerous rural areas of the Świętokrzyskie Province have not developed fully their tourist function despite their natural and cultural values. It is confirmed by calculations and tourist development indices. In 2002 the accommodation was concentrated in 34 villages. At the time, the highest tourist accommodation density index was recorded in Końskie, Masłów and Górnó (Table 1). For the Defert- and the Sneider indices similar tendencies were observed then. The highest values were recorded in three communes: Bodzentyn, Masłów and Górnó.

Table 1. Indicators describing tourist phenomena in rural areas of the Świętokrzyskie Province in 2002

Territorial unit	Tourist accommodation density index	Defert's index	Schneider's index
1	2	3	4
Bodzechów	0.33	4.09	37.15
Bodzentyn – rural area	3.56	178.35	2,859.00
Brody	0.17	7.77	115.06
Busko-Zdrój – rural area	0.55	12.12	179.91
Chęciny – rural area	0.13	1.22	13.36
Chmielnik – rural area	0.04	0.15	2.66
Daleszyce	0.87	9.62	149.75
Górnó	5.53	333.10	2,214.42
Klimontów	0.04	0.66	7.45
Kluczewsko	0.06	0.29	7.60
Końskie – rural area	6.65	88.31	1,318.64
Łagów	0.51	14.27	228.36
Łączna	1.94	76.73	910.95
Łopuszno	0.34	3.02	59.79
Małogoszcz – rural area	1.47	40.74	713.00
Masłów	5.60	259.56	2,430.27
Michałów	0.54	0.45	10.08
Miedziana Góra	4.93	89.68	676.69
Nagłowice	1.85	17.71	382.99
Nowa Słupia	1.74	80.10	701.38
Opatowiec	0.29	21.22	388.84
Pawłów	0.18	2.04	18.69
Pińczów – rural area	0.25	32.18	616.90
Raków	0.26	0.94	29.82

⁸ K. Heffner, *Kierunki zmian w przestrzeni wiejskiej Polski – wpisywanie się w przestrzeń wsi europejskiej*, „Studia KPZK” 2014, Vol. CLVI, p. 37.

1	2	3	4
Rytwiany	0.44	3.19	63.68
Sitkówka-Nowiny	0.33	72.72	489.18
Solec-Zdrój	1.47	6.11	102.02
Staszów – rural area	0.12	6.17	109.81
Stąporków – rural area	0.05	0.14	2.38
Stopnica	0.16	2.06	32.31
Strawczyn	0.52	0.55	4.85
Szydłów	0.24	54.19	1,164.11
Zawichost – rural area	0.65	45.00	925.93
Złota	0.07	0.50	8.11

Source: the author's own calculations based on data from the Local Data Bank of the Central Statistical Office of Poland.

The areas with favourable locations, close to the province's capital city and transportation routes dominated in the year in question. These are also areas situated in the centre of the Świętokrzyskie Mountains. The remaining areas had a marginal impact with regard to the measured indices in the same year. In the year 2012, 48 villages recorded their tourist accommodation facilities in the statistical data of the Central Statistical Office of Poland (Table 2).

Table 2. Indicators describing tourist phenomena in rural areas of the Świętokrzyskie Province in 2012

Territorial unit	Tourist		
	accommodation density index	Defert's index	Schneider's index
1	2	3	4
Bałtów	0.47	14.92	422.26
Bieliny	0.11	1.50	13.03
Bodzechów	1.30	33.55	300.16
Bodzentyn – rural area	1.41	40.68	653.66
Brody	0.30	7.32	105.68
Busko-Zdrój – rural area	0.58	5.61	78.31
Chęciny – rural area	0.27	11.59	122.57
Chmielnik – rural area	0.16	0.09	1.57
Daleszyce	0.79	16.42	268.39
Dwikozy	0.52	32.16	302.00
Fałków	0.30	2.45	68.49
Gowarczów	0.20	7.17	152.49
Górno	5.92	281.58	1,704.67
Iwaniska	0.0	0.28	4.18
Końskie – rural area	4.14	101.96	1,460.46
Krasocin	0.11	0.20	3.52
Kunów	0.26	1.93	29.70
Łągów	0.67	7.97	128.38
Łopuszno	0.18	3.64	71.04
Małogoszcz – rural area *	1.47	31.37	546.01
Masłów	6.33	249.91	2,053.11
Michałów	0.12	0.21	4.80

	1	2	3	4
Miedziana Góra		4.44	53.97	349.99
Mniów		0.00	0.67	6.82
Morawica		0.19	20.26	187.45
Moskorzew		0.37	9.89	262.83
Nagłowice		0.79	16.38	370.38
Nowa Słupia		3.09	64.88	574.78
Obrazów		0.38	3.58	39.07
Opatowiec		0.35	37.99	755.33
Piekoszów		0.12	0.50	3.16
Pierzchnica		0.10	0.63	13.65
Pińczów – rural area		0.40	8.50	166.21
Raków		2.86	2.27	74.69
Ruda Maleniecka		0.41	10.95	368.42
Rytwiany		0.31	10.80	209.37
Sadowie		0.00	6.66	131.41
Sędziszów		0.70	1.93	42.85
Sitkówka-Nowiny		2.30	111.61	681.72
Solec-Zdrój		5.86	152.06	2,528.86
Stąporków – rural area		0.14	1.75	32.40
Stopnica*		0.44	21.20	338.92
Strawczyn		1.16	12.57	105.07
Suchedniów		2.53	8.87	70.78
Szydłów		1.57	50.29	1,131.22
Włoszczowa		0.05	0.03	0.74
Zagnańska		0.47	7.14	69.14
Zawichost		0.98	25.70	552.09

Source: the author's own calculations based on data from the Local Data Bank of the Central Statistical Office of Poland.

In 2012, the role of communes located in suburban zones as well as those with specialised function of a health resort such as e.g. Solec-Zdrój increased. The importance of locations situated in the area of the Świętokrzyskie Mountains – Bodzentyn and Nowa Słupia – also increased. According to J. Bański,⁹ a favourable location usually cumulates positive trends in social and economic development, but the attractive location of a commune does not necessarily lead to its successful economic development – it has to be accompanied by additional elements facilitating socio-economic development. A positive aspect in the possible development of rural areas is the state of the tourist development of areas famous for their unique natural attractions (the Świętokrzyskie Mountains) and the improvement of accommodation in areas with health resort establishments.

The next stage of analysis has focused on the structure of the synthetic measure of the tourist function. It is composed of three elements: tourist values, tourist development and tourist movement. Each module has 2 variables (Table 3).

⁹ J. Bański, *Uwarunkowania sukcesu gospodarczego na wsi*, in: *Dychotomiczny rozwój obszarów wiejskich? Czynniki progresji, czynniki peryferyzacji*, ed. W. Kamińska, K. Heffner, „Studia KPZK” 2011, t. CXXXIII, Warszawa, p. 62.

Table 3. Measures of the tourist function development

Measures		Items
Measures of environmental benefits	1	% of protected areas in the total area of a gmina
	2	number of structures registered as historic monuments in a gmina against its area
Measures of tourist development	3	number of bed places per 1,000 inhabitants
	4	% of persons employed in section I (activity connected with accommodation and food services)
Measures of tourist movement	5	number of bed places users per 1,000 inhabitants
	6	number of bed places used per 1,000 inhabitants

Source: own calculations based on www.stat.gov.pl, www.zabkielce.prot.pl, Baran, Noga, Kiniorska 2015.

In 2013 the measure of the tourist functions development in rural areas of the Świętokrzyskie Province were between -0.58 in the Łączna commune up to 5.11 in the Solec-Zdrój commune. According to the above mentioned measure, 5 types of communes were defined in the rural areas of the Świętokrzyskie Province (Table 4). The biggest group was composed of communes with the very poorly developed tourist function. This group encompassed 50 communes which in 2013 had 48.3% of rural areas inhabitants in the Świętokrzyskie Province. Majority of these communes were concentrated along the western border of the Świętokrzyskie Province with the peripheral location as regards both the biggest cities of the region and smaller county towns.

Table 4. Synthetic measure of the tourist function development in the rural areas of the Świętokrzyskie Province in 2013

Synthetic measure	Number of		Percentage	
	gminas	people	gminas	people
Very high (1.95 and more)	2	15,561	2.1	2.2
High (1.23–1.94)	4	45,365	4.1	6.4
Medium (0.51–1.24)	7	48,410	7.2	6.9
Low (-0.21 – 0.51)	34	253,242	35.0	36.2
Very low (below -0.21)	50	337,867	51.6	48.3
In total	97	700,445	100.0	100.0

Source: author's own calculations based on data from the Central Statistical Office of Poland (www.stat.gov.pl), Baran, Noga, Kiniorska 2015.

The subsequent, 2013 group, was composed of the communes with the low level tourist functions, where synthetic measure was in the range of -0.21 to 0.51 ; it encompassed 34 units with 36.2% of rural areas inhabitants of the Świętokrzyskie Province. They were located mostly in the eastern part of the province. The medium level of tourist function was the feature of the units located in the northern part of the Kielce county. The group with the high and very high level of tourist functions included six communes (Szydłów, Chęciny, Górnio, Końskie, Masłów, and Solec-Zdrój). These units were characterised by a high number of people using bed places per 1,000 inhabitants and a high number of registered historic monuments in a commune against its area. Apart from the areas located in the Świętokrzyskie Mountains, the areas with the health

resort functions such as e.g. Solec-Zdrój commune become more important. This commune has the largest and one of the strongest sources of sulphide water in Europe, a fact of great advantage which had stimulated both the construction of mineral swimming pools and the emergence of sulphide springs. With the increasing clients' and patients' interest, inhabitants of this area decided to meet the visitors' expectations and started individual businesses to provide them with the proper accommodation and food services (guest houses, agritourism).¹⁰

It can be assumed that the fastest development of tourism will be visible in those rural areas that will properly advertise their tourist attractions – both their natural environment and human heritage. They are also investing in the tourist facilities development. An active support from local authorities and community is of high importance here. According to the holistic tourism model, the tourist management should follow the principles of a sustainable development. The role of local authorities is developing local tourism, while simultaneously protecting natural environment and local resources. Privately-owned tourist businesses, hotels, guest houses, accommodation in private houses as well as agritourism farms stimulate management of tourism in the communes.¹¹

Conclusions

For many centuries rural areas were associated with agriculture, still the element shaping most rural areas and one which has long remained the basic part of the rural areas economy. However, the *deagrarisation* of social and economic structures of rural areas is becoming more and more visible; non-agricultural functions, including tourism, are becoming elements of the rural space.¹² The development of the tourist function determines numerous factors including e.g. the benefits that rural areas derive as well as their accommodation, food and recreational base potentials. In rural areas various forms of tourism may be organised within locations with excellent natural environmental resources or outstanding cultural attractions. It mainly refers to villages located in the suburban zones, near rivers, lakes or areas with landscape attractions.¹³

The study shows a certain interdependency existing between the development of tourism and socio-economic conditions. This relation is mostly visible in the areas peripheral to the capital city of the province or the rural areas with more specialised non-agricultural functions, including the industrial function (Sitkówka-Nowiny, Końskie). It may be assumed that the development of tourism in rural areas can may be limited due to larger difficulties in finding external investors. Therefore, tourism can be based on internal resources of communes or their inhabitants. In the

¹⁰ E. Baran, M. Noga, I. Kiniorska, *Rozwój funkcji turystycznej obszarów wiejskich województwa świętokrzyskiego*, „Studia KPZK” 2015, t. CLXIII, p. 264.

¹¹ A. Kotala, A. Niedziółka, *Rola i znaczenie władz lokalnych w rozwoju agroturystyki w woj. małopolskim*, in: *Ekonomiczne i społeczne aspekty rozwoju turystyki wiejskiej*, ed. I. Sikorska-Wolak, SGGW, Wydział Nauk Ekonomicznych, Warszawa 2008, p. 281.

¹² J. Poczta, *Renta położenia jako warunek powodzenia działalności agroturystycznej oraz kształtowania produktów turystycznych na obszarach wiejskich*, in: *Podaż turystyczna jako determinanta kształtowania popytu turystycznego*, Zeszyty Naukowe Uniwersytetu Szczecińskiego nr 701, „Ekonomiczne Problemy Usług” nr 86, Szczecin 2012, p. 301.

¹³ B. Górz, *Funkcje turystyki na obszarach wiejskich*, in: *Studia nad turystyką. Tradycje, stan obecny i perspektywy badawcze*, Instytut Geografii i Gospodarki Przestrzennej, Uniwersytet Jagielloński, 2007, p. 229.

areas more distant from urban centres, with traditional agriculture and more difficult conditions for development, underinvestment is a key factor. Such areas have often the unused environmental and recreational potential, unanalysed in the study but important for defining the possible development of the Świętokrzyskie Province. The highest development potential is the feature of the suburban units located in the vicinity of Kielce and subregional centres. Apart from the peripheral location, other development barriers include the access to transportation system and conflicts between environmental protection (63% of the province's area with special natural values) and other forms of spatial development.

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WYBRANE ASPEKTY ROZWOJU TURYSTYKI OBSZARÓW WIEJSKICH WOJEWÓDZTWA ŚWIĘTOKRZYSKIEGO

SŁOWA KLUCZOWE | potencjał demograficzny, potencjał gospodarczy, infrastruktura

STRESZCZENIE

Turystyka stanowi jeden z ważniejszych elementów rozwoju wielofunkcyjnego obszarów wiejskich. Głównym celem opracowania była ocena wybranych uwarunkowań rozwoju turystyki, ze szczególnym uwzględnieniem procesów demograficznych i gospodarczo-infrastrukturalnych. W opracowaniu wykorzystano dane statystyczne pochodzące z BDL GUS, zakres czasowy przeprowadzonej analizy objął lata 2002–2012. Obszarem badawczym były tereny wiejskie województwa świętokrzyskiego.

THE TOURIST TRAILS DEVELOPMENT IN THE PROTECTION PLANS OF THE LOWER SILESIAN LANDSCAPE PARKS

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landscape park, tourist trail, protection plan, Lower Silesia, nature conservation

ABSTRACT

Landscape parks are created to protect the unique natural, landscape and cultural resources. Nature conservation objectives of the parks are often in conflict with their tourist and recreational functions. In order to enable tourists to enjoy the values of the parks tourist infrastructure should be adequate. One of the elements of tourist infrastructure are tourist trails. The system of the trails and their technical condition have a great influence on management of tourist traffic. The aim of the study is to analyze protection plans of Lower Silesian landscape parks in terms of the guidelines for the development of tourism infrastructure. Protection plans in part relating to tourism development have been analyzed for 8 of the 12 parks in the Lower Silesia Province. This part of documentation identify potential and actual risks within the landscape parks and determine how to eliminate these risks. It provides a basis for proper planning of tourism development taking into account the nature and landscape protection. The analyzes show that in most of the parks the system of tourist trails is correct but there are some proposals for single additions. the need to maintain good condition of tourist trails, eliminate problem of bad marking of the trails and the need for better management of tourist traffic in single parks are also pointed out.

Introduction

Environmental elements, economic, organizational and legal factors are considered the basic conditions for the development of tourism. They are closely linked to each other. Natural and landscape values of the region strongly influence on the interest of potential tourists, however, to enjoy the values they have to be available. The basic principle should be to maintain a balance between the social demand and the potential of the environment. The poorly developed tourism

infrastructure, including bad condition of the tourist trails, may cause the threats to natural and landscape resources. This is particularly important for areas with unique values. Their specificity is secured with the possible forms of protection and is available for tourists at the same time. But nature conservation objectives are often in conflict with tourist and recreational functions. However, these conflicts are mostly caused by the weak diversification of tourist offer, seasonality of tourist traffic or the desire of achieving quick profits.¹ Detailed studies of all the circumstances of the region should be the basis for the proper control of tourism development and planning of tourist infrastructure. This refers to the role of protection plans prepared for Polish national parks, nature reserves, landscape parks and Natura 2,000 areas.

The aim of this study is to analyze protection plans of landscape parks in terms of the need for the development of tourist infrastructure within their borders. Documents for 8 of the 12 parks in the Lower Silesia Province have been analyzed. The studies have been preceded by an analysis of tourist trails in selected landscape parks. The current condition of tourist infrastructure has been compared to the guidelines contained in the protection plans for the selected parks.

Tourist infrastructure

Tourism can be considered on various planes. Firstly, in terms of people (tourists) movement, secondly as a transformation of the land adapting it to the needs of arriving people. One can tell that the main aim of tourism is adapting the most attractive areas for tourist penetration. In this case, tourism should be treated as a spatial phenomenon.²

In the literature on the subject, there is a lot of attempts to define the concept of tourist infrastructure. A. Kowalczyk and M. Derek claim that tourist infrastructure is a system of tourist devices and services existing within the selected area which make geographical space values available for tourists.³ Among them are the basic elements of infrastructure such as accommodation or tourist trails, but also the nutritional base or accompanying base e.g. sports and recreation areas. Tourist infrastructure often generates conflict situations which arise as a result of tourism's impact on the environment, impact on other socio-economic features of the region, but also can occur between different forms of tourism.⁴ Clashes between tourism and the natural environment usually arise at the time when natural resources become available. It is usually associated with the devastation of nature as a direct result of the tourists penetration. Other reasons are the exploitation of resources and too intense and chaotic development of tourist infrastructure. That is why the basic principle that should be taken into account when planning the tourism development is to satisfy the needs

¹ R. Ziółkowski, *Funkcje turystyczno-rekreacyjne obszarowej ochrony przyrody w świetle uwarunkowań prawnych*, in: *Turystyka i rekreacja na obszarach przyrodniczo cennych w regionach transgranicznych północno-wschodniej Polski*, ed. W. Chiżniak, Oficyna Wydawnicza Politechniki Białostockiej, Białystok 2009, pp. 18–31.

² W. Kurek, M. Mika, *Turystyka jako przedmiot badań naukowych*, in: *Turystyka*, ed. W. Kurek, Wydawnictwo Naukowe PWN, Warszawa 2008, pp. 11–49.

³ A. Kowalczyk, M. Derek, *Przedmiot zagospodarowania turystycznego*, in: *Zagospodarowanie turystyczne*, eds. A. Kowalczyk, M. Derek, Wydawnictwo Naukowe PWN, Warszawa 2010, pp. 13–117.

⁴ W. Kurek, M. Mika, op.cit.

of tourists, but most of all the attention should be paid to protect of natural and cultural resources.⁵ According to Kowalczyk and Derek such an approach refers to the concept of sustainable tourism. It should also be emphasized that relations between tourists and the natural environment have been study object for many authors before formulating the principles of sustainable development.⁶

Tourist traffic should be managed in such a way as not to cause environmental damage. Particular care must be taken when using resources within the borders of valuable areas. According to A. Demianowicz and B. Pawichrowska, and in the light of the principles of sustainable development, the tourist infrastructure of protected areas should:

- use natural resources in a rational way,
- prevent degradation by controlling the tourist traffic,
- ensure proper contact with nature,
- cause the penetration places to appear more attractive,
- guarantee obtaining financial profits by the local community.⁷

There are three main tourism management techniques for reducing negative impact of tourist traffic proposed by S. Williams which can be applied in the protected areas: spatial zoning, spatial concentration or dispersal of tourists, and the restrictive entry or pricing.⁸ For this purpose in Poland and other countries there are zones considered to be excluded from the tourists penetration and zones with a specific intensity of tourist traffic. H. Kiryluk claims that among the many causes of threats to natural values particular importance should be assigned to excessive concentration of tourists in a relatively small area or around the most attractive places and improper deployment or insufficient number of tourist infrastructure. Risks may arise as a result of the low level of environmental awareness or inadequately tourism policy of communes located within valuable areas.⁹ The cause of conflicts and threats are poorly defined guidelines of tourism development – they are often inadequate and have no relation to reality.

Tourist trails

One of the basic elements of tourist infrastructure are tourist trails. They are an important element of infrastructure not only from the point of view of the tourists movement to a visited

⁵ A. Kowalczyk, M. Derek, op.cit.

⁶ A. Kowalczyk, M. Derek, *Wybrane problemy planowania zagospodarowania turystycznego*, in: *Zagospodarowanie turystyczne*, eds. A. Kowalczyk, M. Derek (eds), Wydawnictwo Naukowe PWN, Warszawa 2010, pp. 148–196.

⁷ B. Pawichrowska, A. Demianowicz, *Uwarunkowanie techniczne*, in: *Zarządzanie turystyką na obszarach przyrodniczo cennych*, ed. B. Poskrobko, Wydawnictwo Wyższej Szkoły Ekonomicznej w Białymstoku, Białystok 2005, pp. 152–168.

⁸ S. Williams, *Tourism Geography*, Routledge Contemporary Human Geography Series, Taylor & Francis Group, London and New York 1998, pp. 111–114.

⁹ H. Kiryluk, *Problemy rozwoju funkcji turystycznej na obszarach parków krajobrazowych*, in: *Bariery w zarządzaniu parkami krajobrazowymi w Polsce*, ed. K. Zimniewicz, Polskie Wydawnictwo Ekonomiczne, Warszawa 2008, pp. 101–118.

area but also due to the proper management of tourist traffic.¹⁰ According to R. Pawlusiński the tourist trail is a route which connects attractive places and objects. Tourist trails create a coherent system across the country but also can connect with neighboring countries. They become a part of an international network then.¹¹ It is important during planning a new tourist trail to analyze its ability to reach all the waypoints, connections with the existing system of trails, determine its attractiveness and anticipated attendance as well as its future development.¹²

The attractiveness of the trail depends, mostly, on natural and landscape values, but also on the infrastructure of a tourist trail. The important elements which give information about the trail are signposts and information boards. They should be located in rest places and their form and appearance should be consistent with the landscape. An important part are also the elements of small architecture such as observation towers, shelters, benches, tables, picnic areas as well as waste bins and sanitary items.¹³ But their type and quantity depends on the trail type. The first tourist trails in Poland were designated in 1880 by the Society of Tatra Mountains.¹⁴ The institutions responsible for the designation of new tourist trails in Poland are now the Polish Tourist and Sightseeing Society (PTTK) and authorities at local or district level. Because tourists have different needs, there is a necessity for designating specific tourist trails. In the literature on the subject there is a lot of different classification criteria of the trails. For example, Stasiak proposes the following criteria: the purpose of travel, type of transport, the subject of the trail and its range.¹⁵ The subject can be varied. There are nature trails which relate to landscape, ornithological or natural values, but also cultural trails associated with architectural monuments, historical or biographical places etc.¹⁶ With regard to the type of transport, trails are divided into: cycling, horse-riding, skiing, kayaking and sailing. An important addition to the system of tourist trails are educational and walking trails. They are usually short thematic sections of diversified nature. Their basic elements are educational boards related to the subject of a trail.

Tourist trails have different functions. The most important are the tourist and protective roles.¹⁷ It is also worth noting that they can play a role in ensuring the safety of tourists or in the economic stimulation of the areas where they are located. Their ecological function is the most important from the viewpoint of protected areas. First of all, it must be associated with the management of tourist traffic. Therefore it can be an essential tool for the proper use of protected areas. Owing to a good system of trails one can affect the dispersion of tourists and limit the penetration of the

¹⁰ R. Pawlusiński, *Usługi i zagospodarowania turystyczne*, in: *Turystyka*, ed. W. Kurek, Wydawnictwo Naukowe PWN, Warszawa 2008, pp. 164–177.

¹¹ R. Pawlusiński, *Usługi...*

¹² *Instrukcja znakowania szlaków turystycznych*, Wydawnictwo PTTK Kraj, Warszawa 2007.

¹³ E. Panfiluk, *Zagospodarowanie turystyczne Puszczy Białowieskiej na przykładzie szlaków turystyki kwalifikowanej*, in: *Turystyka i rekreacja na obszarach przyrodniczo cennych w regionach transgranicznych północno-wschodniej polski*, ed. W. Chiżniak, Oficyna Wydawnicza Politechniki Białostockiej, Białystok 2009, pp. 114–125.

¹⁴ *Instrukcja znakowania szlaków turystycznych...*

¹⁵ A. Kowalczyk, M. Derek, op.cit.

¹⁶ Ibidem.

¹⁷ Ibidem.

most valuable places. Trails are located both in the most popular and less visited areas. Particularly important is planning the system of trails properly and taking care of the necessary elements of the tourist infrastructure taking into account some factors such as their function, length, topography, established form of nature or landscape protection, existing tourist and para-tourist infrastructure.¹⁸

Tourist trails are planned by the proper commission within the Polish Tourist and Sightseeing Society (PTTK). There are Mountain, Foot, Skiing, Cycling, Equestrian and Kayak Tourism Commission in PTTK.¹⁹ They are responsible for:

- approval of new trails and decisions of changes in the system of existing trails,
- documenting and monitoring of trails,
- taking care both the system of trails and associated infrastructure.²⁰

The basis of the planning and marking of tourist trails within the protected areas is the Nature Conservation Act of 16th of April, 2004.

Landscape parks in Poland

The nature protection system in Poland is regulated by the Nature Conservation Act of 16th of April 2004. One of the forms of nature conservation is the landscape park. Till the end of March 2015 there were 121 landscape parks in Poland, twelve of them located within the Lower Silesian Province. This form of nature conservation is established within the areas with unique natural, historical, cultural or landscape resources in order to preserve and popularize these values in terms of sustainable development. The definition shows the importance of sustainable development principles. In contrast to e.g. a national park or nature reserve, within the area of the landscape park agricultural and forest land and other properties are still in the economic use. That is why landscape parks are specific and multifunctional areas. But there must be a balance between all the elements of the environment in which man exists, so that the use of natural potential should provide realization of the needs of present and future generations. Landscape parks fulfill ecological, social, touristic, recreational, economical and even political functions.²¹ These functions interact differently and very often become concurrent against each other. One example would be the touristic and ecological function. It is developed in the areas of landscape parks, and to different degrees.

The Nature Conservation Act also imposes the obligation to create a protection plan within five years from the date of the landscape park establishment. This document should identify the threats and show the ways of eliminating them, provide guidance for the local authorities in the field of landscape management. Its range in relation to other spatial management documents is confirmed by the need to take it into account in the document of conditions and directions of spatial

¹⁸ Ibidem.

¹⁹ *Instrukcja znakowania szlaków turystycznych...*

²⁰ Ibidem.

²¹ H. Kiryluk, op.cit.

development of municipalities and local spatial development plans as well as forest management plans.²²

Characteristics of the Lower Silesian landscape parks

The unique natural and landscape values of the Lower Silesian Province are protected by all possible forms of nature conservation. Due to the percentage of all legally protected areas in the Polish provinces, the Lower Silesian Province assumes 12th place (31.9%)²³ among 16 provinces.

Table 1. Forms of nature protection in the Lower Silesian Province

Form of nature protection	Number	Percentage of Lower Silesian Province
National park	2	0.60
Natural reserve	66	0.52
Landscape Park	12	10.40
Area of protected landscape	18	9.00
Natura 2000 – SACs	88	18.68
Natura 2000 – SPAs	11	15.53
Ecological land	188	0.20
Nature and landscape complex	16	0.06
Geological documentation place	1	0.00

Source: Regional Directorate for Environmental Protection in Wrocław.

Due to the regime of nature protection, national parks and nature reserves have the highest rank in the Lower Silesian Province. However, if we take into account the percentage of forms of nature protection in the area of the Lower Silesian Province (Table 1) we can see the landscape parks, except for Natura 2,000 areas, are the most relevant. It should be noted that this is an area of landscape parks without its buffer zone. After taking into account the buffer zones (99,229 ha) the whole protected area of the province is greatly increased.

The landscape parks in the Lower Silesian Province have been established for over 17 years now (Table 2). The first two – the Książ and the Śnieżnica Landscape Parks were created in 1981 and the last two – in 1998 (the Jezierzyca Valley and the Sudety Wałbrzych Landscape Park). They are different in terms of the protection area, buffer zone as well as values for protection for which they were established. The Lower Silesian landscape parks protect lowland river valleys, alluvial or oak–hornbeam areas, foothill or mountain areas. They include different types of landscape for example forest, agricultural, lowland, mountain or cultural landscape. Because of the diversity of existing nature and landscape resources in landscape parks there is a possibility to develop almost

²² P. Krajewski, *Ślązański Park Krajobrazowy*, Dolnośląski Zespół Parków Krajobrazowych, Wrocław 2012, pp. 6–7.

²³ J. Burdziej, M. Kunz, *Obszary chronione w Polsce – spojrzenie geoprzestrzenne*, in: *Systemy informacji geograficznej w zarządzaniu obszarami chronionymi – od teorii do praktyki*, eds. M. Kunz, A. Nienartowicz, FUH DANIEL, Tuchola–Toruń 2013, pp. 16–25.

all available forms of tourism: family recreation, sightseeing and as well as specialized forms as skiing, kayaking and rock climbing (Raszka, Krajewski *et al.*, 2015).

Table 2. Landscape parks in the Lower Silesian Province

Name of landscape park	Year of establishment (area of landscape park) (area of buffer zone)	Administrative location	Year of protection plan establishment
Książ Landscape Park	1981 (3,155.4 ha) (5,933 ha)	Wałbrzych, Stare Bogaczowice, Dobromierz, Świebodzice, Świdnica	-
Śnieżnica Landscape Park	1981 (28,800 ha) (no buffer zone)	Złoty Stok, Kłodzko, Bystrzyca Kłodzka, Łądek Zdrój, Międzyzylesie, Stronie Śląskie.	-
Ślęza Landscape Park	1988 (8,190 ha) (7,450 ha)	Jordanów Śl., Sobótka, Dzierżoniów, Łagiewniki, Marcinowice, Świdnica.	2012
Bóbr Valley Landscape Park	1989 (12,295 ha) (11,475 ha)	Jelenia Góra, Jeżów Sudecki, Stara Kamienica, Lubomierz, Lwówek Śląski, Wleń, Świerzawa	2001
Rudawy Landscape Park	1989 (15,705 ha) (6,600 ha)	Bolków, Janowice Wielkie, m. Jelenia Góra, m. Kowary, Mysłakowice, Kamienna Góra, Marciszów	2012
Sowie Mountains Landscape Park	1991 (8,140 ha) (no buffer zone)	Dzierżoniów, Pieszyce, Bielawa, Głuszycza, Walim, Stoszowice, Nowa Ruda	2012
Chełmy Landscape Park	1992 (15,990 ha) (12,470 ha)	Paszowice, Męcinka, Złotoryja, Krotoszyce, Jawor	2012
Jezierzycza Valley Landscape Park	1994 (7,953 ha) (no buffer zone)	Wołów, Wińsko	2012
Barycz Valley Landscape Park	1996 (70,040 ha) (no buffer zone)	Cieszków, Krośnice, Milicz, Prusice, Trzebnica, Twardogóra, Żmigród, Odolanów, Przygodzice, Sośnie	-
Przemków Landscape Park	1997 (22,340 ha) (15,467 ha)	Przemków, Gaworzycze, Radwanice, Chocianów, Gromadka	project
Bystrzyca Valley Landscape Park	1998 (8,570 ha) (no buffer zone)	Wrocław, Kąty Wrocławskie, Mietków, Sobótka, Miękinia	-
Sudety Wałbrzyskie Landscape Park	1998 (6,493 ha) (2,894 ha)	Czarny Bór, Mieroszów, Głuszycza, Wałbrzych, Boguszów Gorce, Jedlina Zdrój	project

Source: B. Mastalska-Cetera, P. Krajewski, *Plany ochrony parku krajobrazowego jako narzędzie zrównoważonego rozwoju*, „Problemy Ekologii Krajobrazu” 2014, t. 37, pp. 147–154.

The development of parks is different in terms of both quantity and quality. The dominant form of tourism in the Lower Silesian landscape parks is hiking with the exception of the Przemkowski Landscape Park where cycling is the most important. The main objective of the tourism development within protected areas is the management of tourist traffic in such a way

that its impact on the environment is minimized. There is about 490 km of tourist trails within the borders of the analyzed landscape parks. They also include thematic ones:

- archeological trails (Jezieryca Valley Landscape Park, Ślęza Valley Landscape Park),
- geological trails, for example, Trail of Extinct Volcanoes (Chełmy Landscape Park),
- cultural trails, for example, Trail of Piast Castles (Rudawy Landscape Park, Bóbr Valley Landscape Park),
- hiking trails, for example, The Main Sudety Trail by Mieczysław Orłowicz (Rudawski Landscape Park, Sowie Mountains Landscape Park and others).

A lot of cycling trails and 36 educational trails are added to the system, of tourist trails in the study area. Particularly interesting are the educational trails in the Myślubórz Gorge and down the slope of the Basaltic Mountain in the Chełmy Landscape Park as well as the trail around the Przemków Ponds in the Przemków Landscape Park.

The highest density of tourist trails is within the Sowie Mountains and the Ślęzański Landscape Park – about 90 km for each 100 km² and the lowest density is within the Przemkowski Landscape Park – about 27 km for each 100 km² (Table 3). The main cause of it is the large area covered by forest.

Table 3. Tourist infrastructure in landscape parks with protection plans

Name of landscape park	Number of tourist trails [pcs.]	Length of tourist trails [km]	Density of tourist trails [km/100 km ²]	Number of educational trails [pcs.]	Number of cycling trails [pcs.]	Number of view points [pcs.]
Ślęzański Landscape Park	5	72	87.91	4	5	4
Bóbr Valley Landscape Park	7	61	49.61	5	5	8
Rudawski Landscape Park	12	69	43.93	4	9	9
Sowie Mountains Landscape Park	8	75	92.13	4	6	1
Chełmy Landscape Park	4	112	70.04	10	2	4
Jezieryca Valley Landscape Park	5	41	51.55	–	3	–
Przemków Landscape Park	3	60.5	27.08	6	6	1
Sudety Wałbrzyskie Landscape Park	11	no data	no data	3	13	2

Source: made by the authors.

Tourist trails in protection plans of the Lower Silesian landscape parks

An analysis of tourism development plans (an obligatory part of protection plans of the Lower Silesian landscape parks) allows for yet another typology of landscape parks. In terms of tourists' interest parks can be identified as of:

- low tourist importance (Jezierzyca Valley Landscape Park, Bystrzyca Valley Landscape Park, Przemków Landscape Park),
- medium tourist importance (Sudety Wałbrzyskie Landscape Park, Chełmy Landscape Park),
- high tourist importance (Ślęza Landscape Park, Rudawa Landscape Park, Sowie Mountains Landscape Park).

The most frequently listed reasons for the low tourist interest are the distance from urban centers, lowland character of protected area, and low accommodation possibilities.

The protection plans of most landscape parks emphasize that the system of tourist trails does not have to be changed. Among the parks with the low density of tourist trails only the protection plan of the Bóbr Valley Landscape Park indicates a possible opportunity to enrich the tourist offer by new cycling trails, educational trails and one more walking trail. The information about the need to expand the existing system of trails appear occasionally (eg. the Chełmy Landscape Park) in the rest of protection plans (Table 4).

Table 4. System of tourist trails in protection plans of Lower Silesian landscape parks

Name of landscape park	Activities in protection plan connected with system of tourist trails
1	2
Ślęza Landscape Park	The existing system of tourist trails requires some changes. <ul style="list-style-type: none"> – it is necessary to repair paths with tourist trails. Because of total destruction of some paths, the blue tourist trail should be planned one more time, – marking of tourist, educational and thematic trails should be repaired, – proposal to plan new cycling trail connected with international cycling trail Euro Velo (R9)
Bóbr Valley Landscape Park	System of tourist trails responds to the needs of tourist, however: <ul style="list-style-type: none"> – new tourist trail along the Bóbr valley should be planned, – two of existing tourist trails should be modified, – two more cycling trails should be planned, – three educational trails should be planned
Rudawy Landscape Park	System of tourist trails needs some changes: <ul style="list-style-type: none"> – marking of tourist, educational and thematic trails is not sufficient and should be repaired, – there is the need for new educational, horse and skiing trails, – it is not enough tourist infrastructure connected with tourist trails, – there is the need to concentrate and control tourist traffic
Sowie Mountains Landscape Park	System of tourist trails is correct and does not have to be changed: <ul style="list-style-type: none"> – new educational trails should be planned, – some parts of the trails should be repaired
Chełmy Landscape Park	System of tourist trails needs some changes: <ul style="list-style-type: none"> – proposal to plan two new tourist trails, – it is necessary to mark educational and walking trails once again, – it is necessary to designate one institution responsible for maintaining existing tourist trails, – it is necessary to maintain tourist trails in good condition, – proposal to rebuild existing viewing tower and build new one at the top of the Dębica mountain

1	2
Jezieryca Valley Landscape Park	System of tourist trails is correct and does not have to be changed: <ul style="list-style-type: none"> – it is necessary to improve the marking of tourist trails, – it is necessary to repair paths with tourist trails, – proposal to correct of one of cycling trails in order to protect sand dunes
Przemków Landscape Park	System of tourist trails is correct and does not have to be changed: <ul style="list-style-type: none"> – it is necessary to correct tourist trails because of duplication with cycling trails, – it is necessary to mark educational trails and build information boards, – proposal to build observation tower near the Przemków Ponds
Sudety Wałbrzyskie Landscape Park	System of tourist trails is correct and does not have to be changed: <ul style="list-style-type: none"> – it is necessary to repair paths with tourist trails

Source: made by the authors on the basis of the protection plans of selected landscape parks – tourism development parts (see References).

The environmental risks identified in protection plans are not associated with too intensive use of tourist trails. Rather, it is a result of the bad condition of some tourist trails or occasionally intense tourist traffic in individual parks during the weekend e.g. the Ślęza Landscape Park. However, it is necessary to point out that in most cases the potential risks are associated with the new forms of tourism (motocross and quads) or the development of recreational functions and the fear of expanding the area with recreational buildings.

The appropriate condition of the tourist infrastructure of protected areas can help to reduce the negative influence of tourists on the environment. Therefore, it is worth noting that an important part of protection plans are indications of the need for constant monitoring the existing tourism infrastructure condition. In all documents there is the information on the need to improve, standardize and repair marking of the trails and repair the paths with trails. They are often neglected and overgrown. That is the reason why tourists do not want to walk there. Particularly emphasized is also the bad condition of the trails in the Jezieryca Valley Landscape Park.

The majority of the parks are located within the areas belonging to different municipalities. This negatively influences the standardization of the tourism development. One good example can be the Sudety Wałbrzyskie Landscape Park where the system of the cycling trails has been created by local initiatives in the form of loops in each municipality. This is advantageous from the point of view of residents, but disadvantageous for tourists and also for the environment. The lack of coordination of activities related to the tourist infrastructure is also observable in the Chełmy Landscape Park. Spychała claims that in the case of the Barycz Valley Landscape Park the protection plan could provide the development of the tourist infrastructure taking into account the specificity of this area. In the current situation, the development of tourism in the park is unequal and dominates only within two of the ten communes.²⁴

²⁴ A. Spychała, *Zagospodarowanie turystyczne Parku Krajobrazowego „Dolina Baryczy”*, “Problemy Ekologii Krajobrazu” T. XXV, pp. 85–93.

Conclusions

The problems and indications identified in the article confirm the necessity of preparing protection plans for landscape parks. They provide a series of guidelines for direct protection of fauna and flora as well as the spatial and tourism management within the landscape parks. Tourist development documentations identify potential and real threats and define solutions to eliminate them. Therefore these analyses are a good basis for the planning of tourism development, taking into account the needs of nature conservation. Unfortunately this type of documents have not been prepared yet for all the parks. The documents for one of the parks are outdated (the Bóbr Valley Landscape Park) and should be revised.

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KSZTAŁTOWANIE SZLAKÓW TURYSTYCZNYCH W PLANACH OCHRONY DOLNOŚLĄSKICH PARKÓW KRAJOBRAZOWYCH

SŁOWA KLUCZOWE

park krajobrazowy, szlak turystyczny, plan ochrony, Dolny Śląsk, ochrona przyrody

STRESZCZENIE

Parki krajobrazowe powoływane są ze względu na wyjątkowe walory przyrodniczo-krajobrazowe. Mogą one pełnić różne funkcje. Często cele ochronne parków kolidują z ich funkcjami turystyczno-rekreacyjnymi. Warunkiem prawidłowego udostępnienia walorów parków dla potrzeb turystów powinno być dostosowanie do jego uwarunkowań zagospodarowanie turystyczne. Jednym z elementów zagospodarowania turystycznego są szlaki turystyczne. Ich sieć oraz stan techniczny wpływają na organizowanie ruchu turystycznego. Celem opracowania jest analiza zapisów planów ochrony parków krajobrazowych ze względu na zawarte w nich wytyczne do kształtowania zagospodarowania turystycznego. Analizom poddano operaty oraz projekty operatów zagospodarowania turystycznego dla 8 spośród 12 dolnośląskich parków krajobrazowych. Operaty zagospodarowania turystycznego identyfikują w granicach parków zagrożenia potencjalne oraz rzeczywiste, określają rozwiązania sprzyjające eliminowaniu tych zagrożeń. Tym samym dają podstawy do właściwego planowania rozwoju turystycznego uwzględniającego ochronę walorów. Przeprowadzone analizy wskazują, iż w większości parków sieć szlaków jest wystarczająca, pojawiają się pojedyncze propozycje drobnych uzupełnień. Identyfikowane zagrożenia dla środowiska naturalnego nie wiążą się z nadmiernym użytkowaniem szlaków. Wskazano jednak na konieczność utrzymania szlaków turystycznych w należytym stanie, eliminację niedociągnięć oraz w przypadku pojedynczych parków potrzebę bardziej równomiernego w czasie rozłożenia ruchu turystycznego.

THE ENTITY STRUCTURE OF THE CROSS-BORDER TOURISM PRODUCT

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KEYWORDS

cross-border tourism product, entities creating a cross border tourism product, West Pomeranian Province and Mecklenburg-Vorpommern

ABSTRACT

A cross-border tourism product constitutes a compilation of tourism potential elements of a cross-border region which satisfy various tourist needs. Functioning of a cross-border tourism product is determined by many diverse factors such as, e.g. natural and anthropogenic values, transport accessibility, a type and quality of tourism and paratouristic infrastructure or a quality of the natural environment. Many entities on both sides of the border are involved in the process of creating a common product, including regional and local tourism organizations, local authorities and other entities interested in the development of tourism. Regions that can develop a common tourism product are the West Pomeranian Province and bordering to the west, the German Federal State of Mecklenburg-Vorpommern. In the process of creating a common product, a significant role is played by entities at a regional level. However, due to the dissimilarity of the Polish and German government systems, the extent of their involvement in the creation of a cross-border tourism product is different. The objective of the article is to indicate entities involved in the process of creating a cross-border tourism product and to describe their role on the example of the West Pomeranian Province and Mecklenburg-Vorpommern.

Introduction

The processes of internationalization in tourism definitely changes previous methods and forms of tourist service and the importance of the quality of tourism services increases. The models of recreation, customer market attitudes as well as expectations towards tourism products change. In the age of intensified competition, which is much visible also between tourism regions, an ability

to develop tourism products appropriately becomes a key factor in terms of a long-term competitive strategy of a region.

Due to their geographical location, cross-border regions have to focus on creating common tourism products which use tourism potential of a cross-border region. Functioning of such tourism products brings financial benefits as well as enriches a tourism offer of regions where such a product exists. Many entities are involved in the creation of a cross-border tourism product, mainly regional and local tourism organizations, tourism enterprises, local authorities and other institutions interested in the development of tourism in a cross-border region. A condition necessary for a cross-border tourism product to be created and function is cooperation between particular entities at local, regional and macro-regional levels.

The objective of the article is to indicate entities involved in the process of creating a cross-border tourism product and to describe their role on the example of the West Pomeranian Province and Mecklenburg-Vorpommern.

Cross-border tourism product and the process of its creation

The term *tourism product* has been analysed in the secondary sources by many authors. It stems from the complexity and diversity of a tourism product as well as from a perspective on the issue. In scientific studies, there can be found definitions which emphasize a service nature of a tourism product and describe it as a set of goods and services which a tourist uses and consumes when travelling.¹ The tourism product is also considered in terms of tourism values which are one of the main motives for travelling by tourists. When defined like that, the tourism product consists of two basic components: tourism goods and facilities as well as tourism services. Tourism goods and facilities include the so-called basic goods which are related to the term *tourism values*, and complementary goods and facilities – called *tourism infrastructure*. Tourism values constitute a dominant goal of travelling, whereas tourism infrastructure enables stay, journey and use of these values.² The view on the tourism product may be expanded by psychological elements which enable taking account of benefits, pleasures and satisfaction which may result from its purchase.³

The tourism product may be also considered from a spatial perspective. According to E. Dziedzic, the tourism product of a region consists of material and non-material elements constituting the basis for an idea and expectations existing in the tourist mind related to a stay in a given place.⁴ J. Kaczmarek, A. Stasiak, B. Włodarczyk describe the tourism product of a region

¹ J.Ch. Holloway, Ch. Robinson, *Marketing for Tourism*, PWE, Warsaw 1997, p. 114.

² S. Wodejko, *Ekonomiczne zagadnienia turystyki*, Wyższa Szkoła Handlu i Prawa w Warszawie, Warszawa 1998, pp. 24–28.

³ V.T.C. Middleton, *Marketing w turystyce*, Polska Agencja Promocji Turystyki, Warszawa 1996, p. 87–88.

⁴ E. Dziedzic, *Obszar recepcji turystycznej jako przedmiot zarządzania strategicznego*, „Monografie i Opracowania” nr 442, SGH, Warszawa 1998, p. 9.

as “an internally complex set of elements distinguished due to their particular location in space characterized by tourism values.”⁵

One kind of the tourism product of a region is cross-border tourism product whose nature and concept have not been sufficiently elaborated in scientific studies and articles. Assuming that the cross-border tourism product is a category of a spatial product, thus the product offered by a specific region (in this case, a cross-border region) can be defined as a set of goods and separate services or packages of related, coherent and complementary services which main aim is to satisfy needs of tourists when both planning a trip, travelling and staying in the cross-border region. The cross-border tourism product should not be considered as an equivalent to the tourism product of countries bordering each other. The cross-border tourism product is developed on the basis of the tourism product (or particular elements creating it) of at least two regions existing on both sides of the border. A condition necessary for such a product to function on the market is a possibility of tourists crossing borders freely.

Main elements of the cross-border tourism product are tourism values, tourism infrastructure and tourism services provided in the cross-border region. Tourism values are those components of the cross-border tourism product which influence a selection, made by a potential tourist, of the cross-border region as a destination. Services enabling a tourist to stay outside their permanent place of living are elements which do not usually provide motives for travelling, however, their lack may prevent from using some, even attractive values. In addition, a low quality of an accommodation base or inconvenient transport connections may become a substantial obstacle to travelling itself. As part of tourism services, transport services are provided on the basis of transport infrastructure, what directly influences transport accessibility (external – enabling a tourist to move from a place of living to a place where a tourism product exists, and internal – enabling a tourist to move across a cross-border region) which, together with tourism infrastructure, plays a significant role in the functioning of the cross-border tourism product. Moreover, such a product can exist effectively on the market when it is recognizable and identifiable by tourists. Therefore, it is very important to include it in a common idea, concept and promotion which increase competitive advantage over other tourism products of a region.

As part of the cross-border tourism product, tourists can combine its elements individually through the purchase of partial services or specialized entities (e.g. travel agencies) can create tourism packages with a common programme, promotion and price.

Thus, the cross-border tourism product is a specific area product which is characterized by the following assumptions:

- it is created from a part of tourism potential of a cross-border region combined into one product with a common name, idea and promotion,
- management of this product is the task of tourism entities located on both sides of the border in a cross-border region,

⁵ J. Kaczmarek, A. Stasiak, B. Włodarczyk, *Produkt turystyczny, pomysł, organizacja, zarządzanie*, Polskie Wydawnictwo Ekonomiczne, Warszawa 2005, p. 76.

- this product is consumed by tourists of both adjacent countries as well as domestic and foreign tourists,
- the creation of the cross-border tourism product stimulates the development of services related to its consumption,
- the majority of funds allocated to the creation of such a product come from the EU aid programmes, however, ensuring constant effects of a product should be provided by entities creating it and local authorities.

The process of developing the cross-border tourism product is complex. The first stage of creating the cross-border tourism product is examining tourism potential of the cross-border region. In order to do that, tourism values (recreational, sightseeing and specialized) should be identified and their role in terms of creating a common tourism product should be determined. The next stage is an analysis of the condition of infrastructure of an area where a tourism product exists (accommodation base, restaurant base, paratouristic infrastructure), as well as legal and technical determinants (important documents of a cross-border, domestic, regional, district and municipality nature) which are in correlation with activities connected with creating the tourism product. After examining tourism potential of a cross-border region, the tourism product to be launched on the market should be selected. The cross-border tourism product can be examined in terms of its type (a service, a facility, an event, an item, a festival, a trail) or a tourism function (e.g. the cross-border product of active, nature, sentimental, urban and cultural, rural tourism). When preparing the cross-border tourism product, it is also essential to indicate entities creating it and to specify their role in its functioning.

Importance of entities in the process of creating the cross-border tourism product

Taking account of its structure, creating the cross-border tourism product requires involvement of a wide range of public and private entities. A scope and number of involved entities as well as their role in servicing tourism movement depend on a structure and nature of a given product. Nevertheless, considering particular universal features describing a structure of the majority of regions of tourism products, including cross-border products, it is possible to specify the ones that play a key role in this process. These are tourism policy entities. From the perspective of entities developing tourism policy, there can be distinguished: tourism policy at an international level, tourism policy at a domestic level, tourism policy at regional and local levels.⁶

Tourism policy entities at an international level are mainly international tourism organizations, however, their influence on creating the tourism product of a cross-border region is insignificant. An international entity that takes part in creating a cross-border tourism product is a Euroregion. It is an association registered in accordance with law of a given country and, as part of which, common decision-making and executive bodies are formed. The main reasons for Euroregions to be founded are common or similar interests resulting from their proximity. These interests may be also connected with peripherality of location which can result in economic neglect. As M. Greta

⁶ W. Kurek (ed.), *Turystyka*, Wydawnictwo Naukowe PWN, Warszawa 2007, p. 393.

emphasizes, regardless of a scope and scale of activities, Euroregions are formed in order to jointly solve local problems of a cross-border nature such as, e.g. protecting and restoring the natural environment, responding to natural disasters, supporting economic growth, including building border infrastructure, supporting local movement and tourism, giving grounds for various human relations.⁷ There is no doubt that the fact that Euroregions exist is a significant incentive for many institutions and social groups to start cooperation with partners on the other side of the border. Thus, they play a significant role in the processes of integration.

At a national level, there are two fundamental types of bodies responsible for tourism policy, that is: National Tourism Administration (NTA) and National Tourism Organization (NTO). NTA is a government body in charge of formulating tourism policy as part of the economic strategy of a public administration, whereas NTO deals with extensive promotion of a national tourism product on the domestic and foreign markets. The participation of these two entities in creating a cross-border tourism product should be supportive. A relevant minister for tourism can create conditions for the development of the cross-border tourism product through supporting institutions or persons connected with it. While, the National Tourism Organization should promote cross-border tourism products and support activities connected with their development.

Entities at a regional level are of great importance in the process of creating the cross-border tourism product. They mainly include regional authorities and regional tourism organizations. Regional authorities cooperate with their counterparts existing on the other side of the border on the basis of agreements or declarations on mutual cooperation. The cooperation concerns many spheres of social and economic life, including tourism, and, as part of it, creating common tourism products. In this respect, regional authorities play a role of an entity supporting the creation of a common tourism product, mainly by preparing lands, premises and infrastructure for the development of a tourism product, cooperating with other entities when creating cross-border transport solutions which increase availability of the cross-border tourism product (e.g. a common tariff offer, the idea of “a common ticket”).

Qualifications to hold the position of a coordinator in the process of creating the cross-border tourism product are showed by regional tourism organizations which can be the administrator of cooperation at a local level and, at the same time, synchronize the whole process of development and implementation of the cross-border tourism product. Their role focuses on combining elements of a cross-border tourism product located on both sides of the border as well as:

- exchanging information on a tourism offer of a region and tourism products locally available,
- searching for common tourism connections,
- finding how to combine a tourism offer,
- applying solutions in problematic areas,
- devising a concept of a cross-border tourism product,
- linking a cross-border tourism product with a common idea,
- promoting a cross-border tourism product under a common brand.

⁷ M. Greta, *Euroregiony a integracja europejska. Wnioski dla Polski*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź 2003, pp. 28–29.

Local entities involved in the process of creating the cross-border tourism product are local authorities which build a partnership (the so-called twinning relationships) with units of local authorities (municipalities, districts, associations of cities/municipalities/districts) of an adjacent area. Partnership cooperation between local units is fundamental for cooperation between other units at a local level in creating the cross-border tourism product. At the same time, it is an essential form of cooperation taking account of the fact that when creating the cross-border tourism product, there are no criteria for product limitation (country or administrative borders). The cooperation of local authorities as part of partnership can concern:

- the exchange of experience and so-called best practice,
- joint infrastructure investments (including investments in particular elements of a cross-border tourism product),
- an increase of internal and external accessibility of a region,
- activities aimed at protection of the natural environment.

When partnerships of municipalities/cities notice common potential for creating the cross-border tourism product, they should draw up a common programme document concerning its creation and development. Such a document (a study, a plan) could direct other activities/investments of a municipalities/city in terms of the development of this product as well as contribute to better harmonization of activities between partner municipalities/cities and specify responsibility of entities for particular activities leading to the creation of the cross-border tourism product.

A significant role in the process of creating the cross-border tourism product is played by local tourism organizations which should cooperate with their counterparts on the other side of the border in order to complete local cross-border initiatives. Effectiveness of activities undertaken in the process of creating the cross-border tourism product at a local level also depends on the scope of cooperation between particular entities (points and head offices) of tourism information in a region and beyond it. Such cooperation concerns mainly the exchange of information on tourism values or cultural events typical of a given municipality/district/city.

It is also essential that tourism enterprises take part in this process since they provide the majority of elements of this product. They include typical tourism enterprises providing accommodation, catering, transport and guide services, equipment rentals for tourists, etc., as well as enterprises providing services for residents of a region and tourists (e.g. retail outlets, galleries, cinemas, theatres, health service, banks, etc.). From the perspective of sales of the cross-border tourism product, a significant role is played by travel agencies which are entities specialized in organizing and brokering in tourism. They include travel agencies and travel brokers who sell offers from providers of tourism services to tourists, as well as entities, which apart from brokering, organize tourism events and provide their own tourism services (tour operators).

In the process of creating the cross-border tourism product, it is essential that primarily entities of regional and local tourism policy cooperate in terms of common tourism infrastructure (e.g. tourist trails and their development), agreements on common forms of promotion of a cross-border tourism product as well as financial support for cross-border tourism initiatives. Tourism enterprises influence the structure of a product.

Entities influencing the form of the cross-border tourism product in the West Pomerania Province and Mecklenburg-Vorpommern

The West Pomerania Province is located in the north-east of Poland. To the west, it directly borders with the German Land of Mecklenburg-Vorpommern. These regions share many similar characteristics. Apart from the comparable area (23 thousand km²) and population (1.7 m), they have much the same conditions for tourism. This mainly results from being located by the Baltic Sea, rich and diverse network of waterways, topography and existence of numerous tourism values, i.e. rivers, lakes, lakelands, forms of nature conservation and historical monuments. Furthermore, these regions are characterized by a well-developed accommodation base, high number of tourists using lodging in collective tourist accommodations as well as good transport accessibility. In the light of the above conditions, the West Pomerania Province and Mecklenburg-Vorpommern are predisposed to developing common tourism products.

Many entities participate in the development of the cross-border tourism product of the regions. One of them is Euroregion Pomerania which represents the cross-border interests of Poland, Germany and Sweden.⁸ The German side in Euroregion is represented by Kommunalgemeinschaft Pomerania e.V. (the Association of Local Authorities Euroregion Pomerania) with the head office in Löcknitz that consociates two districts of the Federal State of Brandenburg (Barnim, Uckermark) and three districts of the Federal State of Mecklenburg-Vorpommern (Vorpommern-Greifswald, Vorpommern-Rügen and Mecklenburgische Seenplatte).⁹ The Polish side is represented by the Association of Polish Local Authorities of the Euroregion Pomerania (SGPEP in Polish *Stowarzyszenie Gmin Polskich Euroregionu Pomerania*) that consociates almost all municipalities of the West Pomerania Province including the City of Szczecin.

The contribution of the Association of Polish Local Authorities of the Euroregion Pomerania in developing the cross-border tourism product involves, among other aspects, the use of EU financial instruments. Euroregion Pomerania is a representative of the Polish members of SGPEP in the EU Initiative Interreg IVA Monitoring Committee of the West Pomerania Province/Mecklenburg-Vorpommern/Brandenburg¹⁰ deciding on which proposals are retained for possible funding, including the proposals related to developing common tourism products. Moreover, the Euroregion's employees work in the Common Technical Office in Löcknitz which collects and prepares proposals on common infrastructure initiatives (including tourism-related ones). A network of the Service and Advisory Centres of Euroregion Pomerania has also been created within the framework of the Interreg IVA programme. In Poland, these centres are located in Koszalin,

⁸ The tourism potential of the Skåne region is not being considered in terms of the development of a cross-border tourism product due to having no land connection with that region. Moreover, the involvement of the Skåne Association of Local Authorities in the Euroregional cooperation is less intense than of their Polish and German counterparts.

⁹ The number of member municipalities was reduced as a result of administration reforms in Mecklenburg of 4 September 2011. In accordance with the Act of Landtag of Mecklenburg-Vorpommern of 12 July 2010 (*Gesetz- und Verordnungsblatt für Mecklenburg-Vorpommern 2010, No. 13, p.366*) the number of districts was reduced from 12 to 6 and, out of 6 self-administrating cities, 2 were left.

¹⁰ It will be known as Interreg VA Programme in the financial perspective of 2014–2020.

Karlin, Szczecin, Myślibórz and Dębno, whereas in Germany they are located in the cities of Greifswald, Neubrandenburg and Schwedt/Oder. In this respect, the contribution of Euroregion Pomerania in the process of developing a cross-border tourism product mainly involves matching potential tourism partners that may combine their offer in the cross-border tourism product or develop a cross-border product on the basis of particular elements of the region's tourism potential.

A place for sharing experiences and finding German partners are conferences and tourism seminars organized by the Service and Advisory Centres. One can list the following organized tourism meetings: the Polish-Germany Forum for Tourism Industry Entrepreneurs, a tourism industry seminars "Prolonging the Tourism Season on the Baltic Sea Seaside" and "Tourism Product of Euroregion Pomerania", the Polish-Germany conference "Tourism Navigation Markers for Water Sports in the Euroregion Pomerania".

Together with their German partner Kommunalgemeinschaft Pomerania e.V, the Association of Polish Local Authorities of the Euroregion Pomerania has been implementing the Small Project Fund of Interreg IVA. These are funds for the implementation of the so-called micro-projects, which aim is to intensify cooperation between communities on both sides of the border and to overcome existing barriers in terms of mutual contacts. Projects eligible for funding are initiatives that improve cooperation in different areas of social life. There were 131 projects funded in 2012 (144 projects in 2010, 123 projects in 2011).¹¹ The aim of cross-border initiatives is to develop a partner dialogue and their main activities concern organizing workshops, concerts, integration meetings, film festivals, sport events, competitions etc. Among these projects, there are also such tourism initiatives as:

- Polish-German adventure hiking runs in the nature park "Valley of Love",
- International Cycling Races in the Parsęta River Basin, Polish-German Tourism Meetings,
- Cross-border Conference "Our Border – Vision and Reality",
- Tourist and Cultural Cedynia,
- Polish-German Days of the Szczecin Lagoon "Trzebieskie Netpunalia".

The listed projects are soft projects¹² and they do not focus on the direct development of the cross-border tourism product, but indirectly influence its structure by launching mutual tourism initiatives. Previous experience shows how significant role small projects play in creating cross-border relations and connections between people. They strengthen the Polish-German cooperation and are an excellent base for next common partner initiatives of residents which in turn lead to a common offer of the cross-border region.

At a regional level, regional authorities and regional tourism organizations are entities that influence the development of cross-border tourism product. Due to the different political systems of Poland and Germany, the structure of regional entities of the researched region is not identical. The German federal system determines a more complex structure of public administration organization than that of a unitary state such as Poland. The regional authorities of the West

¹¹ www.pomerania.org.pl (29 May 2015).

¹² Soft projects mean non-investment projects, usually of a small scope including such activities as training, scholarships, partnerships, cultural and educational events, etc.

Pomerania Province are represented by the Marshal of the Province, while this function is held by the Prime Minister and the Parliament (*Landtag*) in the Federal State of Mecklenburg-Vorpommern.¹³ The Department of International Cooperation in the Marshal's Office of the West Pomerania Province collaborates with the Landtag of Mecklenburg-Vorpommern mainly at social, cultural, economic, local government and political levels. In terms of tourism, the Department of Tourism, Economy and Promotion in the Marshal's Office of the West Pomerania Province and the Ministry of Economic Affairs, Construction and Tourism (*Ministerium für Wirtschaft, Bau und Tourismus Mecklenburg-Vorpommern*) are responsible for cross-border cooperation.¹⁴ The contribution of the Department and the Ministry into the development of the cross-border tourism product mainly involves institutional support of common project initiatives launched by regional and local tourism organizations as well as partner towns and municipalities. However, reciprocal cooperation is impeded due to incompatible administrative systems.

A similar situation can be observed in the case of regional tourism organizations, which have a direct influence on the structure of the cross-border tourism product. There is one regional tourism organization in the West Pomerania Province, namely the Regional Tourism Organization of the West Pomerania Province (ZROT, in Polish *Zachodniopomorska Regionalna Organizacja Turystyczna*). This entity was founded in 2000 under a resolution of the Local Government Assembly of the West Pomeranian Province. The Articles of ZROT adopted on the founding meeting on 15 February 2001 state that the goal and task of the organization is to create an image of the Province as a region attractive to tourists.¹⁵ Furthermore, ZROT is a forum for cooperation between local governments, professional industry organizations and tourism business entities from the West Pomeranian Province. There are 100 entities associated in the organization¹⁶ (32 enterprises, 30 local government bodies, 19 tourism associations and chambers, 15 local tourism organizations and 3 tourism-related entities).

Whereas in Mecklenburg, there are 9 regional tourism organizations in the form of tourism associations which scope of activities includes areas of particular tourism regions of Mecklenburg. Tourismusverband Mecklenburg-Vorpommern e.V. (TMV) takes the role of a parent (so-called umbrella) organization, where all other tourism associations and entities directly or indirectly connected with tourism are members. TMV is responsible for all promotional activities, mainly for creating a brand and implementing common tourism marketing for the region. The goal of the organization is also to take actions that would encourage tourists to visit Mecklenburg and to raise

¹³ The Cabinet of the Federal State of Mecklenburg-Vorpommern discusses questions of political principle and decides on bills which it then proposes in the State Parliament. The members of the Cabinet of the Federal State of Mecklenburg-Vorpommern include the Minister-President as well as the Ministers of eight functional Ministries: Minister of the Internal Affairs and Sport, Minister of Justice, Minister of Finance, Minister of Economic Affairs, Construction and Tourism, Minister of Agriculture, Environment and Consumer Protection, Minister of Education, Science and Culture, Minister of Energy, Infrastructure and State Development, and Minister of Employment, Gender Equality and Social Affairs.

¹⁴ Section 240 is responsible for tourism in the Ministry for Economic Affairs, Construction and Tourism.

¹⁵ The Articles of Organization of the Regional Tourism Organization of the West Pomeranian Province passed on 15 February 2001, as amended.

¹⁶ www.zrot.pl (20 June 2015).

the quality of the tourism offer. To encourage fulfilment of these tasks, quality seals, issued based on objective criteria, are awarded in such areas as: travel for young people, water tourism or the wellness sector.

At a regional level, we should also mention the “Berlin–Szczecin–Baltic Waterway” Cross-border Cluster which goal is to promote water and land tourism along the waterway as a leading tourism offer of the West Pomeranian Province. The cluster focuses on the cooperation of various entities operating in the border area to correlate individual activities of municipalities, dates of cultural as well as recreational and sport events in order to develop a common tourism product with the same brand. Tourists can enjoy 25 Polish and 80 German marinas across the region covered by the partner group around the Szczecin and Kamień Lagoons, the Wolin, Usedom and Rugia islands, the Lake Dąbie and Międzyodrze (the Eastern Odra and the Western Odra rivers).

Thus, the impact of the cluster on the development of the cross-border tourism product is connected with creating an international waterway. However, the cluster should strive to expand its activity by including other forms of tourism, then, other entities connected with the development of tourism in the analysed area would enter its structure. The tourism cluster approach is a desired solution for the development of the cross-border tourism product. The value chain created in this process, by individual providers of tourist services, suggests cooperation and synergy resulting from it.

At a local level, local government bodies and local tourism organizations are entities that develop the cross-border tourism product. Municipalities and towns cooperate with their counterparts on the other side of the border. This cooperation is conducted based on partnership between municipalities, towns and districts. One of the focuses of partnership cooperation are tourism initiatives which goal is to combine particular elements of a tourism product into one coherent product. It is difficult to precisely determine the number of local tourism organizations in the West Pomeranian Province.¹⁷ According to the data available at the website of the Forum for Local Tourism Organizations and the data of the Regional Tourism Organization of the West Pomeranian Province, it has been established that there are, in total, 22 local tourism organizations operating in the West Pomeranian Province. Moreover, regulations of the Polish law¹⁸ on the form of activities of the Local Tourism Organizations in Poland significantly limit the possibilities of

¹⁷ It is due to the fact that there is no uniform database that would include information on all tourism organizations operating in the region. In order to analyse local tourism organizations, one can use the electronic list of the National Court Register, however, data retrieved in this way may be imprecise. Some local tourism organizations may be registered there but do not operate anymore, while other may not have been registered in the National Court Register yet as they are in the process of registering or preparing for this procedure but already operating. Another source of information on local tourism organizations in the region may be the Regional Tourism Organization of the West Pomeranian Province. However, it only keeps record of local tourism organizations that are members of ZROT. Such data is also available on the list of local tourism organizations published on the website of the Polish Tourism Organization. Some local tourism organizations are entities created for the purpose of local partner groups set up as part of projects implemented by the Regional Tourism Forum.

¹⁸ In accordance with the provisions of the Act on Polish Travel Organization, local tourism organizations must be associations.

functioning of and developing such types of entities. As a consequence, these organizations have few possibilities of implementing large, complex, international or cross-border projects.

Local tourism organizations exist in a different form in Mecklenburg-Vorpommern than in the West Pomeranian Province. Entities that deal with local marketing or provide tourist information services may be called local tourism organizations. The structure of these entities includes the following elements:

1. Tourism centres (*Tourismuszentrale*) – serving as tourist information points and a booking system for tourist services. They are financed by town or municipality offices. Examples of such entities include: Tourismuszentrale Hansestadt Rostock und Warnemünde, Tourismuszentrale Hansestadt Stralsund, Tourist – Information Hansestadt Wismar.
2. Urban marketing bodies (*Stadtmarketing*) – dealing with tourism marketing of a particular town. In Mecklenburg-Vorpommern, these bodies function as tourism associations (*Fremdenverkehrsverein der Hansestadt Greifswald und Land e.V.*) or an independent department of a town office (*Stadt Neubrandenburg, Fachbereich Kultur, Stadtmarketing, Schule und Sport*).
3. Commercial companies – dealing with tourism marketing, sales of tourist services, but also functioning as tourist information points in a given area (e.g. *Tourismuszentrale Rügen GmbH*,¹⁹ *Usedom Tourismus GmbH*,²⁰ *Stadtmarketing Gesellschaft Schwerin GmbH*).

There are discernible differences between the functioning and responsibilities of tourism entities in the West Pomeranian Province and Mecklenburg-Vorpommern. The division of responsibilities between various entities seems to be more transparent in Mecklenburg than in the West Pomeranian Province. *Ministerium für Wirtschaft, Bau und Tourismus* carries out the management function, sets out the framework for the development of tourism in the Mecklenburg region and introduces infrastructure solutions enabling further development of tourism in the region. While *Tourismusverband Mecklenburg-Vorpommern* receives funding from the Ministry for its activities and functions as a marketing agency. It is responsible for implementation of any promotional activities on the internal and external markets (incl. tourism trade fairs, publishing houses, television spots, press advertisement). Such a division of responsibilities between the local administration and the tourism organization is very beneficial. Responsibilities are not doubled which is often the case with Department of Tourism, Economy and Promotion in the Marshal's Office of the West Pomeranian Province and the Regional Tourism Organization of the West Pomeranian Province. Furthermore, TMV promotes Mecklenburg as a one, coherent tourism region and additionally the other eight tourism associations conduct intensified activities in the

¹⁹ *Gesellschaft mit beschränkter Haftung* (GmbH) is the most common form of a capital company in Germany. In some aspects German GmbH is similar to the Polish *spółka z ograniczoną odpowiedzialnością* or the English limited liability company.

²⁰ *Usedom Tourismus GmbH* was founded in 2001 by a regional tourism organization *Tourismusverband Insel Usedom e.V.* All marketing and promotional activities for the German part of the Usedom island were handed over to that company. Shareholders of this company include an association of imperial resorts (*KaiserbäderTourismusService GmbH*), the coastal railway of Usedom (*Usedomer Bäderbahn GmbH*) and a regional tourism organization (*Tourismusverband Insel Usedom e.V.*).

scope of tourism development and promotion of a tourism offer. They are focused on particular tourism areas of Mecklenburg, i.e. Rugia, Usedom, the Mecklenburg Lake District, Vorpommern, the Fischland – Darß – Zingst Peninsula and Mecklenburg's Switzerland.

The Regional Tourism Organization of West Pomeranian Province is the only tourism organization operating at a regional level West Pomeranian Province. Even though it cooperates with local tourism organizations as part of membership in the organization structure, this cooperation is insufficient. Most of the local tourism organizations are not able to cope with financial problems. There are not enough funds in the budget of the organizations to conduct professional promotional activities of a tourism offer of a particular area (municipality, district, group of municipalities and districts). Moreover, there are only 22 local tourism organizations functioning in the voivodeship. This amount is far from satisfactory, taking account of the fact that West Pomeranian Province comprises 114 municipalities and 18 districts²¹.

It is visible that the cooperation with the tourism industry is insufficient in terms of tourism activities conducted together. No precise division of responsibilities is defined what results in a situation where some activities are duplicated and conducted separately by few entities rather than in cooperation. One may also observe that there is competition between different organizations (e.g. over the access to funds for a particular project) which theoretically should cooperate with each other.

Conclusions

Entities which exist at macro-regional, regional and local levels take part in the process of developing the cross-border tourism product of the West Pomeranian Province and Mecklenburg-Vorpommern. The degree of involvement of each entity depends on the level at which they operate. However, due to the dissimilarity of the Polish and German government systems, there are discrepancies in terms of responsibilities of the entities creating some obstacles for developing common products. It is most visible at regional and local levels.

In order to combine particular elements of the tourism potential of the West Pomeranian Province and Mecklenburg-Vorpommern, it is recommended for municipalities and districts to cooperate through local tourism organizations as they are one of the entities that participate in the development of a cross-border tourism product. It is also desirable that a local tourism organization becomes a partner for the Regional Tourism Organization of the West Pomeranian Province. As a result, a local tourism organization could propose those elements of a tourism product that the regional tourism organization joins together and undertakes to promote it the country and abroad. While the cross-border cooperation between local tourism organizations and their partners from Mecklenburg-Vorpommern should be based on small initiatives and common cultural events that would support the development of neighbourhood relations.

²¹ www.stat.gov.pl (2.07.2015).

At a regional level, it is recommended that responsibilities in terms of the development and promotion of cross-border tourism products are put in order and tasks between the two largest regional bodies in the West Pomeranian Province are divided so that the leading role of ZROT in the process of developing a cross-border tourism product is indicated in its articles of organization. Furthermore, the Regional Tourism Organization of the West Pomeranian Province should take actions in order to commercialize the cross-border tourism product. To achieve that, it is vital to work with travel agencies by providing them with information about the cross-border tourism product that they could add to their offer.

Developing a cross-border tourism product of the West Pomeranian Province and Mecklenburg-Vorpommern will contribute to achieving a synergy effect. Focusing activities of entities from the West Pomeranian Province and Mecklenburg-Vorpommern on developing a common product will lead to better results than activities conducted by each entity on its own. Joining forces and resources will enable to use the tourism potential better through rational management and may generate added value in a form of cutting costs, e.g. of promotional activities.

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STRUKTURA PODMIOTOWA TRANSGRANICZNEGO PRODUKTU TURYSTYCZNEGO

SŁOWA KLUCZOWE

transgraniczny produkt turystyczny, podmioty kreujące transgraniczny produkt turystyczny, województwo zachodniopomorskie i Meklemburgia-Pomorze Przednie

STRESZCZENIE

Transgraniczny produkt turystyczny stanowi kompilację elementów potencjału turystycznego obszaru transgranicznego, które zaspokajają różnorodne potrzeby turystów. Funkcjonowanie transgranicznego produktu turystycznego jest determinowane przez wiele zróżnicowanych czynników, takich jak np. walory przyrodnicze i antropogeniczne, dostępność komunikacyjna, rodzaj i jakość infrastruktury turystycznej oraz paraturystycznej, czy jakość środowiska przyrodniczego. W proces kreowania wspólnego produktu zaangażowanych jest wiele podmiotów występujących po obu stronach granicy, m.in. regionalne i lokalne organizacje turystyczne, jednostki samorządu terytorialnego oraz inne podmioty zainteresowane rozwojem turystyki. Obszarami, które mogą kształtować wspólny produkt turystyczny jest województwo zachodniopomorskie oraz graniczący od zachodu kraj związkowy Republiki Federalnej Niemiec, Meklemburgia-Pomorze Przednie. W procesie kształtowania wspólnego produktu kluczową rolę odgrywają podmioty występujące na szczeblu regionalnym. Jednakże ze względu na odmienność systemu państwowego Polski i Niemiec, stopień ich zaangażowania w kreację transgranicznego produktu turystycznego jest różny. Celem artykułu jest wskazanie podmiotów biorących udział w procesie kreowania transgranicznego produktu turystycznego oraz określenie ich roli na przykładzie województwa zachodniopomorskiego i Meklemburgii-Pomorze Przednie.

THE TRANSFORMATION OF THE TOURISM FUNCTION OF THE SELECTED JELENIA GÓRA COUNTY AREAS

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ABSTRACT | The Jelenia Góra county is located in the attractive tourist south-western part of Lower Silesia. The area includes four municipalities which can be classified as small towns, they are: Karpacz, Kowary, Piechowice and Szklarska Poręba. The paper focuses on the analysis of the functional structures transformation of these towns, with particular emphasis on the changes in the scope of their tourism functions. The research includes the size, structure and changes in the employment. The study has been made on the basis of the theory of economic base, using two indicators – the Indicator of Labor Surplus (ILS) and the Florence's Coefficient of Specialization (FCS). The research may be useful in planning the development and management of the town.

Introduction

The Jelenia Góra County comprises four town-municipalities, they are: Karpacz, Kowary, Piechowice and Szklarska Poręba. It is assumed that one of the most important sectors of the economy in the subregion is tourism which, as an important source of income for the residents and municipal budgets, has a significant impact on the development of the territorial units. It can be seen in the strategic documents of these towns as well as in the Sustainable Development Strategy of

Jelenia Góra county – the Tourism Development Program in the County of Jelenia Góra, passed by the Resolution of the County Council of 3 July 2001, that the development of tourism – recreational functions is a priority. The Karkonosze National Park is the factor having a huge impact on the development of the tourism function in the subregion. The functioning of the national park leads not only to the limitations deriving from the Act of April 16th on Nature Protection (Dz.U. No. 92, Item. 880, with amendments.), but also multi-million investments in tourist infrastructure financed both from the national and EU money.¹

The aim of the article is to analyze the transformation of the functional structures of the said towns in the years 2005–2013, with the particular emphasis on the changes in the range of tourism functions. It is worth mentioning that the present study is a continuation of the research, the results of which have been presented previously.²

Research method

The study is founded on the theory of economic base. It is one of the most popular concepts explaining the developmental processes that occur on a regional or local scale. Its primary objective is to support the development of the area with an on-export activity ie. satisfying the needs of residents of other, domestic and foreign territorial units. The most important element in stimulating economic growth, according to the concept, is the external demand for goods and services produced in a given area. Companies and sectors producing for export form the so-called economic base of the region, or the economic base of the town. The development of this base provides multiplier effects in the form of the development of the related sectors, subcontractors and the market for local and regional services.³

According to the theory, people employed in a particular town can be divided into two groups:

1. Endogenous group which consists of people working for the needs of the city and its inhabitants; hence as endogenous functions can be classified these sectors of the town economy which mainly support local people.
2. Exogenous group consists of people working to some extent “for export”, i.e. satisfying the needs of residents of other areas; hence exogenous functions (urban-creative, specialized) are fulfilled by these sectors of the economy of the town, which give support not only to local people, but mainly to all people living in the outer areas. These sections are the economic base of the town, their development leads to the inflow of money into the town,

¹ A. Kulczyk-Dynowska, *Inwestycje infrastrukturalne Karkonoskiego Parku Narodowego a zrównoważony rozwój obszaru*, in: *Rola podmiotów sektora publicznego, gospodarstw domowych i przedsiębiorstw w kreowaniu i wspieraniu zrównoważonego rozwoju*, eds. J. Adamek, T. Orzeszko, Prace Naukowe Uniwersytetu Ekonomicznego we Wrocławiu, 2013, No. 297, Wydawnictwo Uniwersytetu Ekonomicznego we Wrocławiu, Wrocław 2013, pp. 209–214.

² K. Przybyła, *Przekształcenia funkcji turystycznej w niektórych miastach powiatu jeleniogórskiego – wybrane aspekty*, in: *Gospodarka turystyczna w regionie. Przedsiębiorstwo. Samorząd. Współpraca*, Prace Naukowe Uniwersytetu Ekonomicznego we Wrocławiu nr 157, Wydawnictwo Uniwersytetu Ekonomicznego we Wrocławiu, Wrocław 2011, pp. 894–902.

³ T.G. Grosse, *Przegląd koncepcji teoretycznych rozwoju regionalnego*, „Studia Regionalne i Lokalne” 2002, nr 1 (8), p. 26.

the rapid growth in the activities of an endogenous character, and consequently to the development of the city.⁴

The article uses two methods to measure the economic base of the town – the Indicator of Labor Surplus (ILS) and the Florence's Coefficient of Specialization (FCS), comprehensively discussed in the previous papers.⁵

Transformation of functional structures in the analyzed towns

The starting point in the analysis of the changes in the functional structures of the examined towns can be a statement resulting from the data in Table 1 that in recent years there have been unfavourable phenomena in terms of the number of employees. So, if in 2009 two of the four examined towns, i.e. Karpacz and Piechowice showed that the total number of employed persons was higher than five years earlier, only in 2013, as compared to 2009, the employment decreased in all the towns. A slightly different situation was in the range of, significant from the point of view of the purpose of this study, Section I of the Polish Classification of Activities (PKD) 2007 (activities related to the accommodation and food service). In Karpacz and Piechowice the number of people working in this section increased periodically, in Szklarska Poręba the negative trend was reversed after 2009. It is worth noting that due to the need of maintaining the confidential character of statistical information it was not possible to obtain the data on the number of employees in this section in Kowary. This reflects a small number of economic operators (less than three in the territorial unit) involved in the activities of this kind in the town, and thus – little significance of this kind of activity for the area's economy.

At the same time, it can be seen that both the total number of globally employed and the number of employees in Section I in Lower Silesia has increased.

The data with the number of persons employed (Table 1), is, in the case of the examined towns, a basis for calculating the Indicator of Labor Surplus (Table 2) and Florence's Coefficient Specialization (Table 4) relevant for 2005, 2009 and 2013. The analysis excludes the agricultural sector, as it does not perform the urban-creative functions.

Using the surplus employees ratio can determine the level of employment in the exogenous group. This is done by comparing the actual structure of employment in the town with the structure adopted as a basis of reference. In this study it is its employment structure in the region. A negative value of the meter means that within the area there are deficiencies which must be supplemented by importing products from the outer regions.⁶

Table 3 presents the employment structural indicators in exogenous group which are a measure of different types of urban-creative functions.

⁴ J. Słodczyk, *Przestrzeń miasta i jej przeobrażenia*, Wydawnictwo Uniwersytetu Opolskiego, Opole 2001, p. 64

⁵ Cf. K. Przybyła, *Przekształcenia...* 896.; Z. Przybyła, K. Przybyła, *The Transformations in the Functional Structure of Jelenia Góra*, in: *Hradec Economic Days 2011, Economic Development and Management of Regions*, Part II, University of Hradec Kralove, Hradec Kralove 2011, p. 240.

⁶ J. Słodczyk, *Przestrzeń...*, p. 70.

Table 1. Workers in grouped sections (sectors) in 2005, 2009 and 2013 by PKD 2007

Territorial unit	Year	Total	Section:						
			A	B-F	G-J	<i>In it I</i>	K-L	M-U	<i>In it R</i>
Karpacz	2005	984	10	46	400	289	89	439	x
	2009	1,550	8	23	902	415	96	521	x
	2013	1,150	7	88	576	444	16	463	28
Kowary	2005	2,037	41	875	208	#	90	823	x
	2009	1,700	54	509	340	#	58	739	x
	2013	1,591	62	432	484	#	50	563	10
Piechowice	2005	1,065	21	733	97	28	4	210	x
	2009	1,221	23	785	205	34	4	204	x
	2013	1,187	19	712	237	40	11	208	#
Szklarska Poręba	2005	1,345	49	123	466	250	40	667	x
	2009	1,241	47	134	288	108	66	706	x
	2013	1,240	48	92	344	163	61	695	53
Lower Silesia	2005	607,223	9,721	238,382	119,710	9,231	28,954	210,456	x
	2009	690,449	7,865	257,441	148,055	12,029	34,206	242,882	x
	2013	710,196	7,948	258,935	155,723	12,493	33,132	254,458	9,856

A – agriculture, forestry and fishing (agricultural sector), B-F – industry and construction (industrial sector), G-J – trade; repair of motor vehicles; transportation and storage; accommodation and catering; information and communications, *In it I* – accommodation and catering, K-L – financial and insurance activities; real estate activities, M-U – other services: e.g. education, human health and social work activities, public administration and defence; compulsory social security, *In it R* – arts, entertainment and recreation, x – no data, # – means that data cannot be published according to statistical secret in the interpretation of Law on Public Statistics.

Source: own study based on data from the Wrocław Statistical Office.

Table 2. Values of ILS for the tested towns

Town	Year	Sections			
		B-F	G-J	K-L	M-U
Karpacz	2005	-340.3	206.0	42.1	98.0
	2009	-554.9	569.6	19.2	-24.2
	2013	-331.3	323.8	-37.6	51.0
Kowary	2005	75.3	-193.6	-7.1	117.0
	2009	-124.9	-24.5	-26.2	141.0
	2013	-148.1	135.1	-24.2	-7.0
Piechowice	2005	314.9	-113.0	-46.8	-159.1
	2009	329.7	-56.8	-56.5	-225.5
	2013	279.2	-23.3	-44.4	-217.3
Szklarska Poręba	2005	-405.0	200.8	-24.1	200.8
	2009	-328.7	21.9	4.5	269.4
	2013	-360.1	72.1	3.2	250.7

Source: own study and K. Przybyła, *Przekształcenia...* 897.

Table 3. Employment structure indicator in exogenous group of the tested towns (%)

Town	Year	Sections:			
		B-F	G-J	K-L	M-U
Karpacz	2005	–	60	12	28
	2009	–	97	3	–
	2013	–	86	–	14
Kowary	2005	39	–	–	61
	2009	–	–	–	100
	2013	–	100	–	–
Piechowice	2005	100	–	–	–
	2009	100	–	–	–
	2013	100	–	–	–
Szklarska Poręba	2005	–	50	–	50
	2009	–	7	2	91
	2013	–	22	1	77

Source: own study and K. Przybyła, *Przekształcenia...* 897.

Florence’s specialization coefficient allows the identification of specialized functions that determine the importance of the town in the region. The value of the meter $w \leq 1$ means that the town does not specialize in a particular sector of the economy, i.e. this area of activity is endogenous. If $w > 2$, the town has a high level of specialization in a particular sector.

Table 4. Values of FCS for the tested towns

Town	Year	Sections					
		B-F	G-J	I	K-L	M-U	R
Karpacz	2005	0.1	2.1	19.3	1.9	1.3	x
	2009	0.0	2.7	15.4	1.3	0.96	x
	2013	0.2	2.3	21.9	0.3	1.1	1.8
Kowary	2005	1.1	0.5	#	0.9	1.2	x
	2009	0.8	0.9	#	0.7	1.2	x
	2013	0.7	1.4	#	0.7	0.99	0.5
Piechowice	2005	1.8	0.5	1.7	0.1	0.6	x
	2009	1.7	0.8	1.6	0.1	0.5	x
	2013	1.6	0.9	1.9	0.2	0.5	x
Szklarska Poręba	2005	0.2	1.8	12.2	0.6	1.4	x
	2009	0.3	1.1	5.0	1.1	1.6	x
	2013	0.2	1.3	7.5	1.1	1.6	3.1

Source: own study and K. Przybyła, *Przekształcenia...* 897.

When analyzing the information resulting from Tables 1–4 it can be noted that:

Throughout the whole period it is Karpacz that remains the center of services. The dominant role of exogenous group of the town is a G–J PKD 2007 grouping, including: trade; repairs of motor vehicles, transport and warehouse management; accommodation and catering business;

information and transport services. Additionally, in 2013, 14% of the exogenous group were employees of M–U grouping, i.e. other services (this group is dominated by non-market services). At the same time, unlike in previous years, in 2013 the K–L grouping was of no relevance for a part of directed “outside” economy of the town, i.e. financial and insurance business, and real estate services were losing from period to period.

Karpacz (at least) since 2009 up to 2013 was very highly specialized in terms of Section I, which can largely be identified with the implemented by the town tourism function. It may be noted that the scope of this specialization decreased since 2005 until 2009, however, in 2013 it was already higher than at baseline (Table 4, Figure 1). The evidence of the fundamental importance of the tourism function for the town’s economy is its specialization in section R (cultural activities, entertainment and recreation).

In Kowary, as already mentioned, the number of total employment constantly decreased, in 2013 it was more than 21% smaller than in the first period. A significant drop in employment occurred in the industrial sector. Taking into account the fact that the value of the ILS for the industrial sector in 2005 was 75.3, in 2008 (–124.9), and in 2013. (–148.1), we can see significant shortages in production, to have been replaced by the import of goods from outside the town. The situation is more clearly visible in employment rates in the exogenous group - in 2005 38% of all employees engaged in the activities directed outside the town were employed in the industrial sector, after 2009 this share dropped to zero.

In 2009, the grouped sections M–U, i.e. other services that reached at this time a low level of specialization, were essential for the outwardly directed part of the economy of the town. In 2013 the grouping lost its relevance. At the same time there was an increase in the rank of G–J group. Due to the fact that the value of the FCS for the group grows steadily, it can be expected that the town will develop its specialization in this area. However, considering the small number of economic operators functioning in the activities described in Section I, and due to the lack of specialization in the R section, it can be stated that the tourism function is not an exposed part of the economy of the town.

Piechowice, throughout the whole period of the research, remained an industrial center. In 2005 68.8% of total employment, in 2009 64.3% and in 2013 60% of employees still worked in this sector. This is undoubtedly related to a special economic zone which is dynamically functioning in the town. However, SEZes (Special Economic Zone) in the Lower Silesia were affected by the global economic crisis.⁷ Its effects also moved to Piechowice subzone of Kamiennogórska SEZ manifesting as a decrease in employment in the industrial sector. This was reflected in the WSF whose value decreased from 1.8 in 2005 to the size of 1.6 in 2013. It developed throughout the period of the research maintaining endogenous character – the service sector grouped in sections G–J. At the same time the town, compared to other towns in the Lower Silesia, presented an average specialization within Section I which is a part of the group. The range of expertise in this area in

⁷ See K. Przybyła, *Influence of an Economic Crisis on Functioning of Special Economic Zones in the Lower Silesia*, in: *Hradec Economic Days 2014, Economic Development and Management of Regions*, Part IV, University of Hradec Kralove, Hradec Kralove 2014, pp. 201–207

the years 2005–2009 got slightly reduced (2005 – 1.7, 2009 – 1.6) to reach in 2013 the highest in the analyzed period WSF value of 1.9 (Figure 1). Considering the steady increase in growth in the number of workers in this section, it can be assumed that Piechowice gradually develops tourism function, complementing the economic landscape of the town.

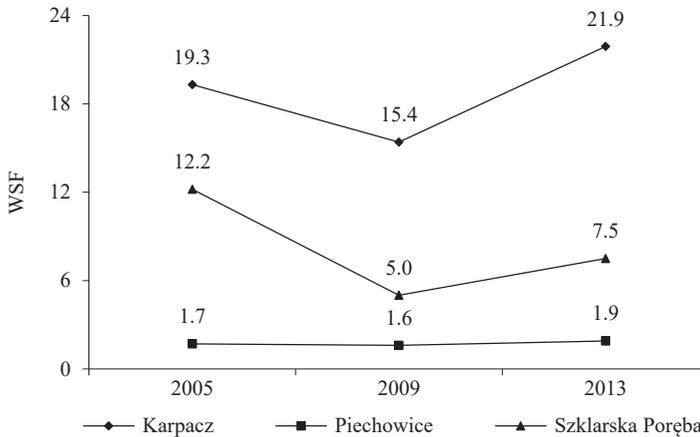


Figure 1. Changes of the level of specialization in Section I in 2005–2013

Source: own study.

Szklarska Poręba has remained the multi – service town. In the first period of the research, 50% of all employees engaged in the activities of an exogenous character were employed in the services sector G–J, then this share fell in 2009 to achieve the level of 7%. After 2009 the number of persons working in a grouping G–J began to increase, and simultaneously the share of workers employed in the urban–creative group increased to 22%.

This has been reflected in the value of the FCS, which for 2005 reached the size of 1.8, for 2009 – 1.1, and in 2013 – 1.3 (Figure 1). At the same time there were very significant changes in Section 1 which is a part of the grouping. The decrease in the number of the employed in this section in the town (56.8% vs. 2009/2005) was accompanied by the increase of this figure in the region (over 30%). It has been marked as a significant decline in the value of the WSF (2005 – 12.2, 2009 – 5.0) (Figure 1). Thus, in 2009, Szklarska Poręba was still highly specialized in tourism function, but the scope of this specialization was firmly contracted. After 2009 the situation improved. The employment in Section I in the town did not reach the level from the initial period, but significantly increased (in relation 2013/2009 by more than 50%). At the same time the number of the employed in Section I in Lower Silesia slightly increased. As a result, the measured level of FCS in Szklarska Poręba increased in 2013 to 7.5. A proof of the essential importance of tourism functions to the economy of the town is the high specialization in Section R.

During the whole period of the research, the grouped sections M–U were of relevance for the outwardly directed part of the economy of the town. Szklarska Poręba obtained and maintained

a specialization in financial services, grouped in sections K–L (financial and insurance activities, real estate activities).

Conclusions

It can be concluded that in three of the four analyzed towns the size of exogenous groups in 2013 was lower than in 2005 – in Kowary by 29.7%, in Piechowice by 11.3% and in Szklarska Poręba by 18.8%. Only in Karpacz the size of this group increased by 8.3%. At the same time there was transformation of dominants in the exogenous employment structure. It can be assumed that, depending on the involvement of local authorities and the possession and use of endogenous growth factors by individuals (such as capital, infrastructure, geographical location, recognition of the town), the towns improved or lost economic importance in Lower Silesia.

Two of the four analyzed cities – Karpacz and Szklarska Poręba – essentially based their growth on the implemented tourism function. In Piechowice tourism formed and complemented the economic landscape of the town. It can be seen that in the towns the level of specialization in section I PKD 2007, after declining for years 2009/2005, began to grow. In the case of Kowary tourism was not an essential element of the town economy.

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PRZEKSZTAŁCENIA FUNKCJI TURYSTYCZNEJ WYBRANYCH OBSZARÓW POWIATU JELENIOGÓRSKIEGO

SŁOWA KLUCZOWE

miasta, funkcje turystyczne, metody oceny funkcji jednostek osadniczych

STRESZCZENIE

Powiat jeleniogórski ulokowany jest w atrakcyjnej turystycznie, południowo-zachodniej części województwa dolnośląskiego. W jego granicach zlokalizowane są cztery gminy miejskie, zaliczyć je można do grona miejscowości małych, są to: Karpacz, Kowary, Piechowice i Szklarska Poręba. W artykule dokonana została analiza przekształceń w strukturach funkcjonalnych tych miast, ze szczególnym uwzględnieniem zmian zachodzących w zakresie pełnionych przez nie funkcji turystycznych. Przeprowadzono badania nad wielkością, strukturą i zmianami zatrudnienia. Badanie wykonane zostało na gruncie teorii bazy ekonomicznej, przy wykorzystaniu dwóch mierników – wskaźnika nadwyżki pracowników (WNP) i współczynnika specjalizacji Florence'a (WSF). Badanie może być przydatne w planowaniu rozwoju i w zarządzaniu miastem.

TOURISM ACTIVITY AMONG SENIORS: A CASE-STUDY FROM WARMIAN AND MASURIAN VOIVODESHIP

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ABSTRACT

This work focuses on the issues related to tourist activity of older people. The paper presents the results of the pilot research conducted during the summer of 2013 on a sample of 141 people age 55 and older living in the Warmia and Mazury region. This study, carried out within the framework of the "TOURAGE project – Developing Senior Tourism in Remote Regions", revealed the average senior tourist from the Warmia and Mazury region and his or her holiday preferences. In the analysis, the main features of tourist activity was described, including frequency of tourism, motivations and forms of participation in tourism, organization of tourist activities, and how seniors spend free time. These considerations expanded to an analysis of the issues of tourism activity among seniors.

Introduction

The aging of populations observed in recent years is one of the most important social and economic dilemmas of the modern world. While in 2000 the percentage of women over the age of 60 and men over 65 was 14% of the population, according to the demographic forecasts, by 2030 this number is expected to rise to 24% and reach 9.29 million people on average across Europe.¹

¹ *Rocznik Demograficzny 2010*, GUS, Warszawa 2010, p. 167.

According to the data of Poland's Central Statistical Office, in the last quarter-century the country has observed a slowdown in demographic growth. The aging of the Polish population resulting in part from a lengthening of life expectancy is at the same time exacerbated by a low fertility rate. In addition, these changes are further intensified by increased emigration of young people. It is true that Poland is still perceived in Europe as a demographically young country; however, from the beginning of the 1990s the average age of a Polish citizen has increased by nearly seven years. In 2013, the average age for the entire Polish population was nearly 39, but higher for women (average of over 40) than men (average of 37).²

The data published by Eurostat shows that in Poland the number of people over 65 years old will increase from 13.5% in 2010 to 34.5% in 2060. Despite a better starting position (a working age population that was almost four percentage points lower than the EU average), the process of the aging of the demographic structure in Poland will be much deeper than across the EU (in 2060, the population over 65 years old will be higher than the EU average by five percentage points).³ Therefore, in the near future Poland will have to deal with a demographically advanced population.⁴

The changing demographic structure of the population makes the subject of seniors' tourist activity of particular importance as a form of prevention of aging effects on the human body.⁵ The positive impact of physical activity on the health and wellbeing of older people is undeniable and confirmed by numerous studies.⁶ Participation in various forms of recreation has a significant impact on improving the health and quality of life of older people. Active tourism and leisure are special forms of recreation and refers to physical recreation, rather than passive forms of leisure, which research by GUS⁷ and MSiT⁸ shows is unfortunately the most favourite activities amongst Polish seniors. Physical activity in the form of hiking, walking, or cycling is closely related to the age of the respondents. Taking into account the results of research conducted by CSO in 2013, this

² *Sytuacja demograficzna osób starszych i konsekwencje starzenia się ludności Polski w świetle prognozy na lata 2014–2050*, GUS, Warszawa 2014, p. 2.

³ http://epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/3-08062011-BP/EN/3-08062011-BP-EN.PDF (14.04.2013).

⁴ See J. Zielińska-Szczepkowska, A. Żróbek Różańska, *Aktywność władz samorządowych w obliczu zmian demograficznych kształtujących sektor turystyczny, przykład województwa warmińsko-mazurskiego*, *Studia i Prace Wydziału Nauk Ekonomicznych i Zarządzania* nr 37, Zeszyty Naukowe Uniwersytetu Szczecińskiego nr 826, Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, Szczecin 2014.

⁵ Z. Ossowski, T. Taraszkiewicz, M. Formella, *Aktywność turystyczna seniorów szansą na rozwój turystyki w Polsce*, *Ekonomiczne problemy usług* nr 82, Zeszyty Naukowe Uniwersytetu Szczecińskiego nr 697, Szczecin 2012, p. 295.

⁶ See H. Szwarz, T. Wolańska, T. Łobożewicz, *Rekreacja i turystyka ludzi w starszym wieku*. Instytut Wydawniczy Związków Zawodowych, Warszawa 1988; A. Grzanka-Tykwinska, K. Kędziora-Kornatowska, *Znaczenie wybranych form aktywności w życiu osób w podeszłym wieku*, „Gerontologia Polska” 2010, t. 18, nr 1, Kraków 2010, pp. 29–32; K. Zamłyńska, *Turystyka i rekreacja a promocja zdrowia rodziny*, *Roczniki Naukowe AWF w Poznaniu* nr 54, Poznań 2005, pp. 173–180.

⁷ GUS – Central Statistic Office in Poland, *Turystyka i wypoczynek w gospodarstwach domowych w 2013 r.*, GUS, Warszawa 2014, p. 77. The research was conducted in 2013 on a group of 4,548 households in Poland, among them 1,308 households were represented by a retired person.

⁸ MSiT – Ministry of Sport and Tourism in Poland, *Preferencje osób starszych dotyczące wyjazdów turystycznych*, Korporacja Badawcza Pretendent, Wrocław 2011, p. 8. In 2010 the research was conducted in Poland on a group of 1,067 people aged over 55 years and more.

form of activity constituted only 9% of the oldest group of respondents (aged 65 years and older), while the most common forms of leisure activities chosen by Polish seniors were: listening to the radio and music, watching TV and videos, and use of the internet (26% of respondents), reading (13%) and passive recreation (12%). Only 7% of respondents in this age group spend their time actively on a garden plot.

Although tourism is considered to be one of the most attractive forms of recreation, it is still not a very popular form of activity for elderly people in Poland.⁹ Research conducted in 2010 and commissioned by MSiT, shows that as many as 67% of Polish seniors (age 55 years and older) did not travel anywhere, while 15% went on long-term trips, 10% cited touristic reasons, and 8% went on short-term trips inside the country.¹⁰

The reason for the low interest in tourist trips by seniors in Poland may stem from economic reasons¹¹, but there is also a lack of special offers targeted to this specific group. This is confirmed by numerous meetings with seniors and representatives of local authorities, organizations working for seniors, University of the Third Age, and tourism companies, which took place in 2013 in the Warmia and Mazury region. Among the major issues that have a negative influence on the size of the senior tourism market in Poland, participants in these workshops listed, among others:

- difficulties with passing along tourism offers to seniors because of the low internet usage rate by this specific group, which is now one of the most important sales channels,
- the lack of publications on tourist packages for seniors, which results in a lack of interest among local tour operators to promote special offers for the elderly,
- lack of funds for the implementation of local projects that support the development of senior tourism.¹²

The purpose of this article is to provide a basis for the preliminary analysis of tourist activity of the residents of the Warmian and Masurian Voivodeship over 55 years of age. Pilot studies have been carried out on a group of 141 people from the region of the Warmia and Masurian Voivodeship during the summer of 2013. In the article, beyond the results of a survey that has been carried out, the Polish and foreign literature as well as the statistical data published by GUS and Eurostat, have been used. We also use the strategic document published on the website of the European Commission as well as the information from the completed TOURAGE project which encouraged the development of international senior tourism.

⁹ See J. Śniadek, A. Zajadacz, *Senior Citizens and Their Leisure Activity: Understanding Leisure Behaviour of Elderly People in Poland*, "Studies in Physical Culture and Tourism" 2010, Vol. 17, No. 2, pp. 193–204.

¹⁰ *Preferencje osób starszych...*, p. 16.

¹¹ More information about economic factors influence on preferences of senior tourists in Poland in: J. Śniadek, *Konsumpcja turystyczna polskich seniorów na tle globalnych tendencji w turystyce*, "Gerontologia Polska" 2007, t. 15, nr 1–2, pp. 21–30.

¹² These are the conclusions of the seminar entitled „Seniors in tourism – a desirable target group or unwanted customers?” which took place on 21st March 2013 in Elbląg. The seminar was organized by the Association of Polish Communes Euroregion Baltic within the TOURAGE project. There were representatives of local authorities, senior citizens associations, academia and tourism industry. The discussion was moderated by Ms Joanna Zielińska-Szczepkowska from the University of Warmia and Mazury in Olsztyn, www.tourage.eu/index.php?mact=News,cntnt01,detail,0&cntnt01articled=44&cntnt01origid=66&cntnt01returnid=66.

TOURAGE Project – Developing Senior Tourism in Remote Regions as a case-study of the development of tourism possibilities for the growing segment of elderly travellers

The profound demographic changes taking place in recent years in Europe have been not only the subject of scientific analysis but also strategic plans undertaken at both the national and regional levels as well as by the EU institutions themselves. In 2010, the European Commission, in its document *Europe – the Most Popular Tourist Destination in the World – a New Political Framework for Tourism in Europe*, pointed out that beyond such challenges as the economic crisis, climate change or the development of new technologies, the European tourism sector should take into consideration issues that stem from an aging society.¹³

These changes will need a quick response from the tourism sector to maintain its present level of competitiveness. According to the demographic prognosis for 2020, seniors will constitute 20% of the population and also have both purchasing power and leisure time. To fully exploit the economic potential of the silver economy, it is necessary to identify seniors' needs and to create a suitable offer for them as tourists.

The answer to these challenges was the “TOURAGE project – Developing Senior Tourism in Remote Regions” which ran from 2012 to 2014 and was founded by the Interregional Cooperation Programme (INTERREG IVC).¹⁴ The project grew out of the idea that instead of challenges, demographic change can also bring opportunities to regions. Tourism is one of the fastest-growing industries in Europe, and relatively remote regions have much unexploited and yet widely unknown development potential in this sector. The project seeks to find best practices for developing tourism among the growing segment of elderly travellers.

The overall objective of the project is to enhance the regional economy by means of senior tourism development and to support active and healthy aging. The project aims to enlighten responsible personnel among regional authorities, decision-makers and politicians in the field, with the challenges and benefits, future possibilities and trends, and above all, best practices exchanged and deployed. In the realization of this project there were involved 12 partners from 10 EU countries:

- Regional Council of North Karelia, Finland (Lead Partner),
- Bourgas Regional Tourist Association, Bulgaria,
- Region of East Macedonia & Thrace, Greece,
- Lake Balaton Development Coordination Agency, Hungary,
- Szabolcs–Szatmár–Bereg County Regional Development and Environmental Management Agency, Hungary,
- West Regional Authority, Ireland,
- Vidzeme Planning Region, Latvia,
- Association of Polish Communes of Euroregion Baltic, Poland,

¹³ *Europa – najpopularniejszy kierunek turystyczny na świecie – nowe ramy polityczne dla europejskiego sektora turystycznego*, KOM (2010) 352, Bruksela 2010.

¹⁴ www.tourage.eu (19.01.2015).

- Podkarpacie Region, Poland,
- North-West Regional Development Agency, Romania (Project partner till 31.12.2012),
- County Council of Granada, Spain,
- Regional Development Agency of the Prešov Self-Governing Region, Slovakia.

The main activities carried out under the project include:

- a) identification and exchange of good practices which help take over the challenges associated with senior tourism (“silver tourism”);
- b) evaluation of the most important challenges of silver tourism in the regions;
- c) exchange experiences on senior tourism through successful seminars, working groups and study visits;
- d) developing of joint methodologies and giving policy recommendations based on good practices exchanged during the project;
- e) increasing networking capacity and synergies within European-wide silver economy networks and projects;
- f) finding of solution to turn population ageing also into asset and overcome structural change by new innovative means;
- g) promote sustainable regional economy and wellbeing.

The results gained in this collaboration will be essential instrument to communicate to the rest of Europe the means by which “The Senior Tourism Model” can be created and enhanced and also what kind of tools can be used to improve Regional Senior Tourism Policies.

Material and Methods

The aim of the research is to identify the senior tourism activity, how seniors spend their free time as well as identify some selected factors motivating elderly people to lead active lives. The empirical material that forms the basis of this work was collected during surveys conducted in the period June–August 2013. The main criterion for the selection of the sample has been the respondent’s age (at least 55) and place of residence (Warmian and Masurian Voivodeship). The study has collected 141 completed questionnaires that are correctly filled in. The study is carried out on the group composed of 17% men and 83% women. All of the respondents are retired, and, at the period in question, most of them were retired for more than six years (6–15 years, 53% of respondents; more than 15 years, 6%).

The adopted research method is a diagnostic survey in the form of a questionnaire. The questionnaire consisted of 14 items, including open (2), mixed (6) and closed (6) questions with either single or limited multiple choices, and a section on gender, age, education, labour history and material wellbeing. The vast majority of the questions are related to the determination of preferences and needs of seniors in the field of tourism. The scope of the questions include: the preferred duration of the holiday, destination (in the country or abroad), preferred time of year (seasons), organization of leisure, sources of information about tours, means of transport, company kept during the holiday, factors that influenced the decision to travel, reasons to take the decision

to leave for a holiday, and reasons that encouraged them to choose particular destinations. The data analysis involves descriptive statistical methods.

Results

In reference to the research by J. Śniadek (2007), observations of the tourist market in Europe show a tendency to greater interest in tourism among seniors from Western Europe than from Poland. In the opinion of the tourism industry, the ordinary retired Polish tourist has relatively little purchasing power because of the low living standard in retirement.¹⁵

The survey conducted among seniors from the Warmian and Masurian Voivodeship shows a completely different result. It is true that 27% of respondents have identified their financial status as unsatisfactory; however, the vast majority of respondents identified their monthly income as on the level of the average monthly pension¹⁶ (28%) and above average (43%). That question is related to another one about the continued employment after retirement. Among the entire group of respondents, 17% have declared some form of employment. This is an important message from the answers – that seniors are open to entrepreneurship. A correlation of these two questions indicates that active tourists are primarily those seniors who have additional financial resources beyond their retirement incomes.

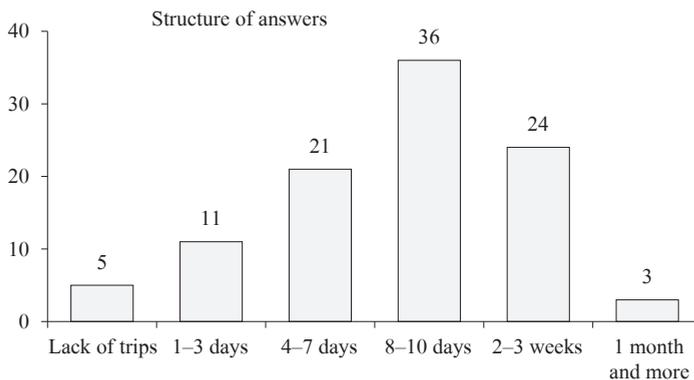


Figure 1. Usual length of holiday since retirement pension (%)

Source: own study based on the survey.

One of the questions included in the questionnaire related to the usual length of a senior's holiday since they have been living on their retirement pension. Most of the respondents prefer to take 8–10 day holidays (37%) or even shorter stays similar to working periods (4–7 days, 21%)

¹⁵ J. Śniadek, *Konsumpcja turystyczna polskich seniorów...*, p. 21.

¹⁶ In 2013 average gross monthly pension from the Social Insurance Institution in Poland was 1,970.39 PLN, *Emerytura i renty w 2013 r.*, GUS, Warszawa 2014, p. 65.

(Figure 1). Some of them answer with longer stays (2–3 weeks, 24%; 1 month or more, only 3%). The hypothesis that seniors are willing to spend more time on holiday is not true, as their travel patterns are quite similar to other active citizens, with only some group of seniors spending more time on holiday, usually at nursing homes.

Our results show that the seniors in the survey prefer domestic trips (71%). However, almost a quarter of the respondents prefer to travel abroad during their holidays. This shows that seniors are an important potential market. Regional strategies should focus on how to reach internationally oriented senior tourists and on how to attract them to the respective regions. These seniors are open to travel abroad during their retirement as well, though it is more a question of whether service providers can understand their specific needs. The latter part of the questionnaire tries to answer these questions as well and determine the specific motivations and needs of these tourists.

Analysing the respondents in terms of in which season seniors are willing to travel, the results show they prefer to travel in summer (37%), though for this age group travelling in spring (27%) and autumn (31%) are also an acceptable periods (Figure 2). Winter is the least preferred season for holidays, mostly because of the safety aspect of the specific weather conditions. Bearing in mind the European Union policy on dealing with the problem of seasonality in tourism, it seems reasonable that the tourism sector in Poland should see an opportunity in the creation of individual tourist offers that are cheaper for seniors in low season. A very good example of such activities is found in Spain within the *Europe Senior Tourism Programme*.¹⁷ It is worth noting its social benefits: from October 2010 to April 2011, a total of 54,713 people from 16 European countries used the programme. The economic aspect of this was significant: the programme generated EUR 35 million and 880 new jobs.¹⁸

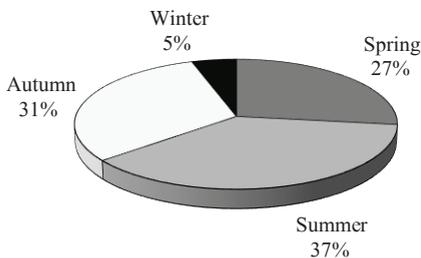


Figure 2. Season of senior tourism

Source: own study based on the survey.

¹⁷ Europe Senior Tourism is a pioneering project worldwide. It is a travel programme promoted by the Spanish government, designed for European seniors over 55 who wish to enjoy active holidays while sharing experiences, www.europesenior tourism.eu/pl/index.html (20.02.2015).

¹⁸ *Evaluation of the profitability and economic impact generated by the Europe Senior Tourism Programme*. Executive summary, Innova Management, Turismo-Ocio-Hotelaria, August 2011, www.europesenior tourism.eu/export/sites/senior/comun/descargas/evaluationEuropeSeniorTourismProgramme.pdf (27.02.2015).

Most of the seniors surveyed prefer to organise their travel individually (30%) or by purchasing travel/accommodations through a travel agency (32%). There is one important note about the role of various pensioner organisations and associations, and also some social tourism schemes have been mentioned by respondents. The pensioner organisations (such as pensioners' clubs, thematic pensioner associations, University of the Third Age) are key players in organising group travel for seniors. Also, some associations (tourism, religious) coordinate travel for seniors (although they are not specifically focused on seniors in their offers). Package tours/all inclusive holidays booked via the internet were bought by only 2% of the surveyed seniors.

The seniors report personal experience (47%), family (28%) and friends (62%) are the most important sources of information for making decisions on travels. Regular media and social media are not relevant sources of information (for only 7% of respondents), although according to the results of national research, internet users over 50 years of age in Poland are relatively active on social networking sites, amounting to almost 70% of those age 50–64, and 50% of those 65 or older.¹⁹ In the category of “other”, some specific sources of information are mentioned: while pensioner organisations (clubs, University of the Third Age) are crucial, suggestions from doctors have been mentioned as well.

A spouse/partner (41%) and friends (38%) are the most common travel mates based on the answers received (31%). Every tenth respondent spent time alone (11%), while only 5% of the respondents decide to holiday with their grandchildren or other relatives.

Three questions especially focus on the motivations and needs of seniors. As this group is treated as a new, emerging market for tourism products, these specificities could be important to the development of new destinations and services especially designed for seniors.

Financial reasons (45%) and health problems (54%) are the main barriers of travel for seniors. Financial issues are specific to the periphery of the EU and especially in the low-income areas of Europe, which shows the importance of social tourism for seniors. A third group of barriers is the lack of transport connections, and safety at the destination and during travel. These are mostly related to the logistics of senior tourism, which are in line with the view that they prefer to travel in groups (not alone), are looking for a safe holiday where they can get all services they require at the necessary quality, and a destination that can be easily reached by direct transportation links.

The rest and silence is an extremely important factor for seniors (65% of the answers altogether) when they plan their holidays (Table 1). It is an important criterion for the Warmian and Masurian region's plan to extend senior tourism. It should offer places that are relaxing and which provide a safe environment for seniors. Family is also a major motivation factor for holidays (52%). In many cases family members (children, grandchildren) are living farther away and holidays are a way to meet with family members. For seniors, it is also important to escape daily routines (39%, similar to younger people), experience something new (47%), make new friends, and to socialize (43%).

¹⁹ B. Szmigielska, A. Bąk, M. Hołda, *Seniorzy jako użytkownicy internetu*, “Nauka” 2012, nr 2, p. 145.

Table 1. Motivations for holidays (%)

Reason for travelling	Validity of the reason*					n/o
	1	2	3	4	5	
To enjoy rest and silence	5	–	9	39	26	21
To improve quality of life	3	5	28	26	11	27
To make friends and socialize	11	3	20	34	9	23
To look for romance	34	17	5	5	5	33
To experience something new	5	5	13	30	17	30
To escape routines	12	6	18	22	17	25
To spend time with my family	3	5	9	32	20	31
Others	–	–	–	–	5	95

N = 141, Evaluate on a scale from 1 (no importance) to 5 (extremely important), where: * 1 = no importance, 2 = not very important, 3 = neutral, 4 = some importance, 5 = extremely important, n/o – no answer.

Source: own study based on the survey.

Nature, a sense of safety, historical sites, quality services and easy transportation connections (81% of the answers in total) are the top five attraction factors for seniors when choosing a destination. Sports, snow, handicrafts, dancing, camping (5% of the answers in total) are the five least attractive factors. Based on the analysis of 31 factors, it can be said that a perfect standard for a senior tourist can be shaped out of the top five attraction factors. Even in the previous answer, safety, easy access, the quality of services, and nature and historical sites are mentioned, so there should be a way for senior tourists in the Warmian and Masurian Voivodeship to be attracted by these factors. The importance of health and medical services are also high.

Conclusions

The aging of the population has turned attention to the implications for social and economic development. Among them, tourist activity among seniors is noteworthy.²⁰ Today's seniors, regardless of strongly rooted stereotypes, are a different social group than in previous decades.²¹ Nowadays, older people are much better educated, live in better conditions, benefit from widely

²⁰ The information on the tourism activity of seniors and its preferences are also brought up: K. Parzych, *Uwarunkowania aktywności turystycznej osób starszych. Studium przypadku słuchaczy Uniwersytetu Trzeciego Wieku w Słupsku*, Zeszyty Naukowe Uniwersytetu Szczecińskiego nr 805, Ekonomiczne Problemy Turystyki nr 1 (25), Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, Szczecin 2014, pp. 309–325; J. Zawadka, *Preferencje seniorów dotyczące wypoczynku na wsi na terenie Lubelszczyzny i Podlasia*, Zeszyty Naukowe Uniwersytetu Szczecińskiego nr 806, Ekonomiczne Problemy Turystyki nr 2 (26), Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, Szczecin 2014, pp. 299–313.

²¹ More information about determinants of the tourism consumption of seniors in: M. Walker, *Marketing to seniors*, 1st Book Library, Bloomington 2004, p. 9; J. Śniadek, *Age of Seniors – a Challenge for Tourism and Leisure Industry*, "Studies of Physical Culture and Tourism" 2006, No. 13, pp. 103–106; A. Gardner, *Travel Is Ageing Gracefully*, "Tourism Review Magazine" 2009, p. 44, www.tourism-review.com; I. Patterson, *Growing Older. Tourism and Leisure Behavior of Older Adults*, CABI Publishing, Wallingford, Cambridge 2006.

accessible information, and are interested in a professional and socially active lifestyle. This change creates opportunities for the development of many sectors of the economy,²² including tourism.

The results of the pilot survey conducted in 2013 as part of the TOURAGE project may provide a basis for further research on a representative sample of people age 55 years and older. The actual test results indicate the significant potential of the Warmian and Masurian Voivodeship in the development of senior tourism and they may be useful in the preparation of offer of travel agencies and social organisations, addressed directly to seniors living in the Warmia and Mazury region. To the respondents, very important factors favouring holidays abroad, preferably in the spring, summer or autumn, are, among others, the possibility to rest in peace and quiet, the cultural values of the place, local traditions and cuisine. It should be emphasized that the Warmia and Mazury region is recognized in numerous scientific studies and strategic documents for the development of tourism in Poland as a region having outstanding qualities in this regard. Its varied landscape with plenty of lakes and forests, numerous architectural monuments and religious buildings all create an incentive for relaxation and sightseeing tours for seniors. The region is also a prominent place in the country in terms of the number of lodgings and accommodations. At the same time, GUS statistics show the region suffers from a major problem with seasonality in tourism: the utilization of beds is the highest in the summer (July and August, on average 45%) compared to autumn and spring (on average 18–25%).²³ A response to this problem could be senior tourism development.

The positive impact of tourist activity on the health and wellbeing of older people is undeniable and confirmed by numerous studies. However, offers for tourists targeted to their specific needs and the opportunities for this market segment in Poland are still relatively modest, despite the fact that seniors are a more numerous and strong consumer group in terms of purchasing potential. The results of the study indicate that the vast majority of seniors in the region of Warmia and Mazury organize their tourist trips on their own, relying on their own experience and by obtaining detailed information about destinations from friends and acquaintances. A big role in this respect could be played by institutions and non-governmental organizations acting on behalf of seniors in society, as well as local governments and entrepreneurs themselves, who unfortunately almost never participate in surveys. The active policy of local authorities in cooperation with entrepreneurs from the tourism sector in the creation of an attractive tourist offer for the elderly, taking into account their physical and mental requirements, can be a source of benefit for both society and the economy as a whole.

²² The answer to these challenge is the conception of „*silver economy*”, see A. Klimczuk, *Srebrna gospodarka w dokumentach strategicznych państwa*, in: *Zmieniający się świat. Perspektywa demograficzna, społeczna i gospodarcza*, Oficyna Wydawnicza SGH, Warszawa 2013. pp. 461–472.

²³ *Turystyka w województwie warmińsko-mazurskim w 2013 r.*, GUS, Warszawa 2014, p. 5.

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AKTYWNOŚĆ TURYSTYCZNA OSÓB STARSZYCH – PRZYKŁAD WOJEWÓDZTWA WARMIŃSKO-MAZURSKIEGO

SŁOWA KLUCZOWE | starzenie się społeczeństwa, aktywność turystyczna, preferencje turystyczne seniorów

STRESZCZENIE

W niniejszym artykule zaprezentowano wyniki pilotażowych badań ankietowych przeprowadzonych w okresie wakacyjnym 2013 r. na próbie 141 osób w wieku 55 lat i więcej, zamieszkujących województwo warmińsko-mazurskie. Celem badań zrealizowanych w ramach projektu „TOURAGE – rozwój turystyki osób starszych w regionach peryferyjnych”, było nakreślenie sylwetki przeciętnego seniora – turysty z regionu Warmii i Mazur oraz określenie jego preferencji turystycznych. Omówione zostały motywy podejmowania przez respondentów podróży, a także charakter tych wyjazdów. Rozważania poszerzono o zagadnienia aktywności turystycznej osób starszych.