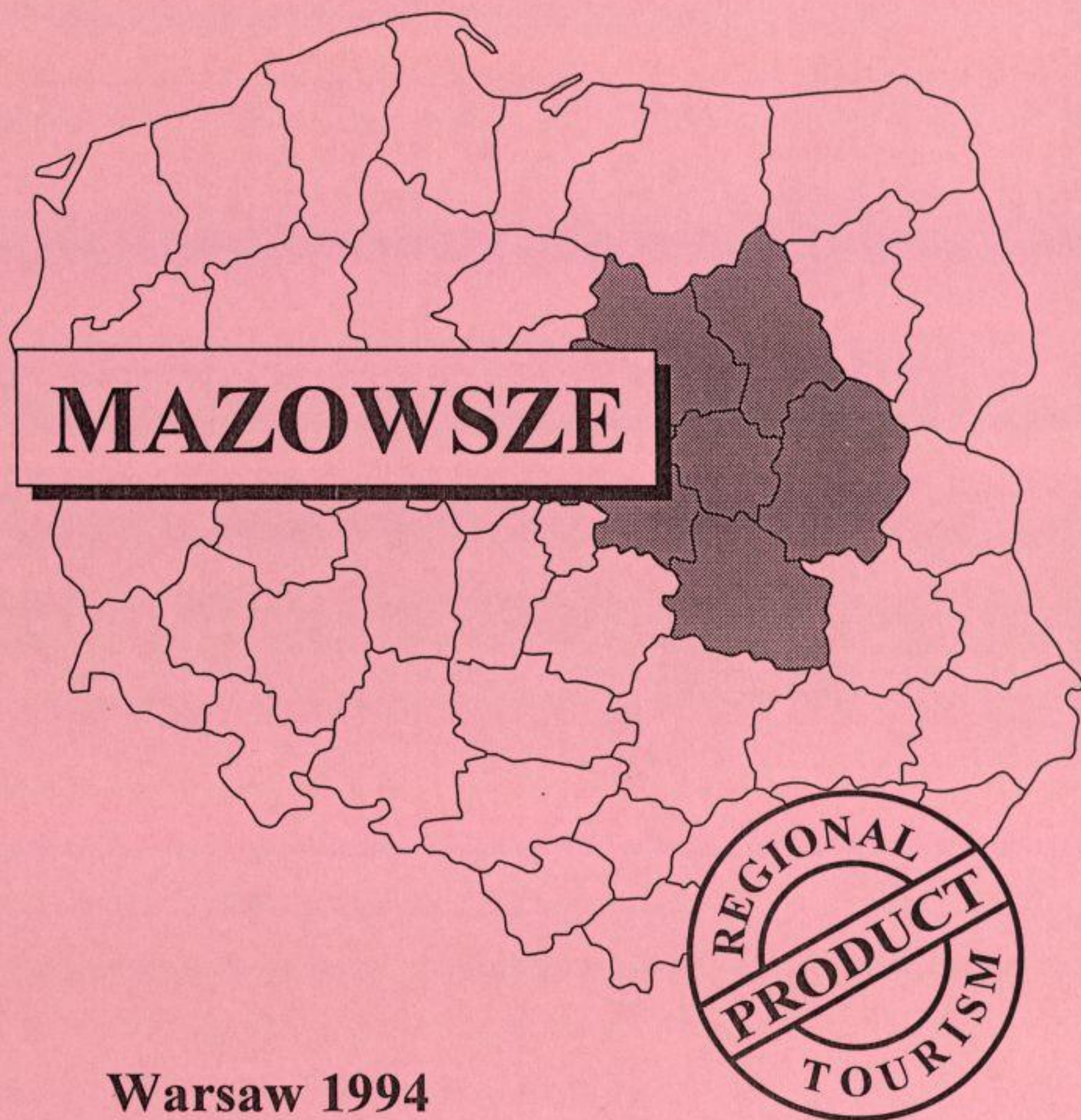


**State Sport and Tourism Administration**  
**PHARE PROGRAMME »TOURIN I«**



**Warsaw 1994**

State Sport and Tourism Administration

## TOURIN I PHARE PROGRAMME

### REGIONAL TOURISM PRODUCT

# MAZOWSZE

Conference in Warsaw-Miedzeszyn, 23-25 November 1993

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Institute of Tourism  
ul. Merliniego 9a  
02-511 Warsaw  
ph. 44 63 47

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## Opening Speech

I would like to welcome all participants of the "Tourism product development of Mazowsze" conference. During the next three days, among professionals who deal with tourism, we will analyze all major problems which influence tourism in Warsaw and its neighbouring voivodships, and will shape future development of this sector.

Our conference, organised and financed under the TOURIN Programme, is the fourth meeting devoted to tourism product in particular regions. Good results of our meeting are guaranteed by numerous and representative group of people who are with us today.

This conference is meant to help us in working out a general concept for development of tourism and tourism product, supplemented by promotional tips, which will take into account specific conditions of represented voivodships. We believe that we will be able to influence the way of thinking about tourism and its role in our reality. Our whole economy undergoes faster or slower transformations. That is why so important is the way of treating the sector, which bases on natural and cultural values of our country, and which is not fully appreciated and seen as a sphere which may as well compete with our heavy or light industry in generation of national product.

Once again, as a host of this region, I would like to welcome all participants of our conference and wish you fruitful meetings.

**Bogdan Jastrzębski**

**Voivode of Warsaw**

**Marek Paszucha**

**President of State Sport and Tourism Administration**

## **State Policy in Tourism Industry Development**

As it was said by the voivode of Warsaw, our conference is the fourth one organised this year. The first one was held in Książ near Wałbrzych, and was devoted to Lower Silesia and the region of Opole. It resulted in signature of an agreement between four voivodes of Jelenia Góra, Wałbrzych, Wrocław, and Legnica. Opole voivodship is only partially a tourist area and it carries out its own activities in this field.

The second conference on Western Małopolska was focused on voivodships of Nowy Sącz, Bielsko Biała, Cracow, Tarnów, and Częstochowa.

The third and the biggest conference was held in Cetniewo, and was devoted to the region embracing five seaside voivodships and three voivodships of Pomorze Nadwiślańskie - voivodships of Toruń, Bydgoszcz, and Włocławek. Today and during the next couple of days we will talk about Warsaw and Mazowsze.

Each one of the macroregions mentioned above is different, mutual relation between voivodships within them vary, too. Voivodships of Jelenia Góra and Wałbrzych are do not compete with each other, whereas the voivodship of Wrocław appears to be an administrative centre, and Legnica voivodship is different from others. So we may say that they are complementing each other. A similar situation may be observed in Western Małopolska, in which Nowy Sącz and Bielsko Biała voivodships are competitive, and Cracow, Tarnów, and Częstochowa voivodships are in no way similar. In the third big region, the Polish coast, Voivodships of Szczecin and Koszalin, Gdańsk and Słupsk compete with each other, but have nothing in common with Toruń, Włocławek and Bydgoszcz.

Those three conferences produced a number of conclusions. Some tend to be often repeated what indicates that we have a good foundations for planning economic development by tourism. We also have interesting recommendations concerning these regions. Generally we want people to realize what "raw products" may be turned into a given tourism product.

This conference is different from previous ones as the Warsaw voivodship is very specific due to the capital it embraces and its various relations with voivodships surrounding it. We expect that numerous methodological and complex guidelines, including those addressed to institution operating in the region, will be formulated here. The fate of the possible agreement

between voivodes of the region represented during our conference depends on the Warsaw voivode, Mr Jastrzębski and participants.

I would like to apologize to those participants of our conference who will not find things I want to say very original. But we do know that some people perceive tourism in many ways, e.g. does not tell tourism and tourism industry apart. Tourism and travel have already created the world's biggest industry. What is even more important, they became the force capable of helping countries, regions, cities, destinations in economic development and creating new jobs. The share of tourism in world national product in 1994 will rise up to 10%, and will amount to 3.4 thousand billion USD. Every ninth employed person, i.e. 200 million people, will work in the tourist sector. Investments connected with development of tourist infrastructure will reach almost 700 billion USD, what will constitute over 6% of value of all world investments. Taxes and other charges related to tourism in a direct or indirect way, to be incurred worldwide in 1994, have been estimated at 650 billion USD. It has been forecasted that till 2005 tourism receipts will double, as compared to 1990. At the same time, total taxes paid by the tourist sector will increase from 500 to 1500 billion USD, and government expenditures on tourism development will rocket from 250 to 820 billion USD.

Travel and travel-related expenditures are an important element in the life of a modern man, including Poles. After work and home, tourism became the third most important life quality indicator. In such countries as Japan, Germany, United States or Great Britain travel expenditures range from 14 to 16% of all household expenditures. Total expenditures on outcoming tourism are also on the increase. 42 billion USD were spent by the Americans in 1991, 32 billion were spent by Germans, and 17 billion by the British. Germans left a significant part of their expenditures in Poland. The share of Europe, the biggest tourism market, in tourism receipts will amount to 42% in 1994. The share of Eastern Europe will exceed 8%.

In Western Europe, in which turnover of tourism sector exceeds turnover of other industries, new trends began to pop up within the past couple of years. There is a decreased interest in the "three S's": sun, sand, sea, and a raised interest in active recreation and leisure. International weekend tourism and stays in centres offering a rich package, including much more than just meals and accommodation, proceed to gain popularity. Green tourism is becoming trendy, so are tourist destination with closed water circulation systems, offering wholefood, and which guarantee use of recyclable products, environment friendly cleansers and ecological products. Such forecasts and observed trends also provide good prospects for the Polish tourism industry. Also in reports of the World Bank and International Monetary Fund tourism was recognised an economic sector with good development potential, which may contribute to restructuring of the national economy.

Till 1989, that is for about 45 years, tourism had been perceived as an element of social welfare providing health and high spirits to the working population. Tourism and recreation of youths, understood as an element of education, played an important role in the state policy, too. The state policy, besides the exchange with the former Eastern Block countries, referred exclusively to inbound tourism. International tourism traffic served by specialist state enterprises, mainly ORBIS, was administratively limited as a sign of visible luxury (trips abroad) or a way of gaining hard-currency (arrivals). Development of tourism services was not stimulated by the actual demand but political decisions regarding social needs and way of their satisfaction. Therefore, tourism was systematically incorporated into the sphere of social policy like it still is today, and was not associated with economy.

Political, social, and economic transformations of the past four years justify not only changes in tourism policy, but also in perception of tourism industry, seen as a group of inter-related elements of the national economy, which becomes a model of the market economy. I will repeat this sentence to make sure there is no misunderstanding - **tourism industry is a group of inter-related elements of the national economy.**

Tourism became a field, in which market mechanisms and principles were the first ones to show some results in Poland, a field which underwent rapid transformations and often helps in fighting recession, in both regional and national economy. As it is in all transformed sectors, we come across certain problems, but we are generally moving on. There are favourable conditions on the market of tourism investments, although it is not even throughout Poland. Engagement of foreign capital exceeds 800 billion USD, what puts tourism on the second place after the motor industry. Together with complementary sectors such as civil aviation, border crossings, catering, and travel services, tourism takes the lead in utilisation of foreign credits. Between 1989 and 1992 the private tourism sector has expanded by 3 thousand travel agencies and tourism offices varying in size, turnover, and scope of activities. The mere 1992 was marked with registration of 315 units, in which 190 were private domestic enterprises, 95 joint-ventures, and 28 co-operatives. The number of catering establishments run by corporate bodies has gone up by 68% in 1992, and by further 30% in 1992.

Development of incoming tourism was significantly stimulated by agreements abolishing visa requirements, signed with 40 countries and the Commonwealth of the former USSR countries, and establishment of new border crossings. There are 180 of them today, but only 100 crossings are open permanently and serve passenger traffic. Local communities begin to realize that in fact, location of a border crossing is important - it is very true in the case of Poland's eastern and western border. Economic transformation undergoing in Poland, and especially opening up to the world, the freedom of economic activity, the freedom to travel, free hard-currency turnover, initiated restitution of local governments, all gave tourism

industry a chance for development, what resulted in a visible modernisation of air and rail transportation, development of road infrastructure and catering services along roads, facilitated travel organisation due to availability of passports, a vast number of travel offices, agencies and establishments providing tourism services, increased number and capacity of border crossings, and finally introduction of over 3000 company-owned social tourism establishments into the market of tourist services.

The range of international traffic, hard-currency receipts, generated budgetary revenues, creating new jobs, economic animation of various complementary sectors prove possibilities of tourism industry. They also point out to necessary revaluations which have to be done in the sphere of tourism-related state policy. Changes in the system of state management, newly established economic chambers, and consolidated status of local governments constrained direct impact the state administration had on economic subjects. At the same time, the legislative role of the state has also been augmented. Activities aimed at development a modern tourism industry in Poland began to dominate in the state tourism policy. Substantial budgetary resources have been allocated on marketing activities on international markets, on promotion of tourist destinations and destination areas.

New outlook on tourism and tourism industry has imposed the need for reformulation of principal terms connected with development of tourism policy. According to the newest definition of WTO, tourism includes activities of travellers and persons staying temporarily outside their usual environment, regardless of the trip purpose. The trip purpose may be leisure, recreation, sightseeing, visiting family or friends, religious purposes, as well as business, professional purposes, or shopping. The basic aim of the tourism industry is provision of services to travellers, that is also to people who change their environment for a certain period of time. Therefore, a traveller is both a person visiting a given country or destination, who does not stay there overnight, and a tourist, i.e. a person staying at least one night in a visited country or destination. Therefore, there is no need to use complementary terms such as "visitor", "traveller", or "tourist". A traveller is a visitor who does not stay overnight, a tourist stays overnight. All figures quoted by the World Tourism Organisation, and Institute of Tourism in Poland, take this definition into account.

In 1992 Poland was visited by 49 million persons, in which 18 million were tourists, i.e. people who stayed in Poland overnight. Economy-wise, the biggest importance had the use of incoming tourism as a substantial factor in equalizing the Polish balance of payments. In the years 1989-1992, expenditures of foreigners in Poland rocketed. In 1992, foreigners left behind in Poland over 4 billion USD, as compared to barely one billion in 1989. If we assume that some 300-400 billion USD "flow out" through our eastern border, then still almost 4 billion USD flows in to Poland the same way. In this amount 2.5 billion USD was spent in Poland by Germans, 400 million by residents of the former USSR, who took a similar amount

out with them, 200 million by residents of the Czech Republic and Slovakia, and some 100 million by Americans. Forecasts say that in 1993 receipts of incoming tourism will exceed 5 billion USD, though a significant part of this money is paid cash in hand to people who do not pay taxes of it, and often claim unemployment benefit.

At present the volume of hard-currency receipts depends first and foremost on the number of visitors to Poland, and secondly on the volume of expenditures per person. It is our interest to encourage visitors to penetrate Poland, make them buy our services and products. We should finally realize what can be sold, on what conditions, and to which customers.

As it is in the whole Europe, inhabitants of neighbouring countries are the mainstream of incoming tourism to Poland. Generally, 75% of travellers take foreign trips to neighbouring countries : Americans go to Canada or Mexico, Japanese to Asia, to Hawaii, or USA. We are next to Germany. There is only one conclusion - no matter we like Germans or not we have to be smart enough to make this neighbourhood profitable. One may easily notice that the diversified German markets, or rather markets, are the most important for Poland. The biggest group of visitors are residents of areas adjoining the border, who know Poland and visit it due to its low prices (exclusive of hotel prices). Together with the remaining population of the former East Germany, these are also potential customers for Polish holiday centres, that is infrastructure of state companies. Another important group is made up by inhabitants of western lands who visit Poland for cognitive purposes and recreation. Besides businessmen, it is a group who spends the biggest amount of money during their stay in Poland. Markets of the former Eastern Block countries are dominated by Czechs and Slovaks and inhabitants of post-USSR countries. Altogether the market comprises 15 million persons visiting Poland.

One should stress that there is a positive trend to switch from hard-currency export to purchase of goods, what for instance is a very favourable phenomenon for the region of Zamość, Gorzów, and Suwałki. Besides the neighbouring German market, among developed countries the markets of America, where we have to develop promotion in New York and California from the very beginning; Scandinavia, where we are also forced to start promotion from the beginning as for the past ten years this market has practically died out, and the transit route runs through Germany. Other important markets include British, Benelux, French, Austrian, and Italian markets. The number of arrivals generated by these countries ranges from 150 to 250 thousand persons annually.

And how does our domestic tourism traffic look in the light of these figures? Since a couple of years the percentage of Poles who do not leave their place of residence even for one day is maintaining the level of some 47-51%. On the average, a five day or longer trip is taken by every third Pole. Holidays were one of the most important indicators illustrating tourism mobility of Poland's population. In 1992, 33% of population went on such trips. The

overwhelming majority, over 70% of these trips, were organised individually. The number of holidays bought from travel offices shows a continuous declining tendency. In 1992, they amounted to about 5% of all trips.

After the dramatic slump in the second half of 1980s, the number of people staying in company-owned establishments has reached a stable level of a little below 20%. It should be noted, however, that there is an extreme discrepancy between the city and the country. Every second inhabitant of a big city, an only every fifth inhabitant of the countryside went for holidays. Every fifth inhabitant of a big city and every twentieth inhabitant of the countryside travelled abroad in 1992. Although in 1992 over 29 million Poles were reported to have crossed the border, only 12% declared to have travelled abroad that year - so some people travelled abroad many times. It has been implied that between 1993 and 1995 the number of border crossings by Polish citizens will increase annually by some 13-15%.

Almost half of Poland's area has recreational and natural values and infrastructure. Poland has 750 thousand places of accommodation including 50 thousand motels beds. Occupancy rate amounts to 40-50%. This way, taking into account 49 million arrivals from last year, 29 million trips taken by Poles, 40 million Poles travelling within Poland, with at least one overnight stay, and 14 million Poles leaving for a trip lasting longer than 5 days, we have 130 million people travelling or remaining outside their residence, who need services and products throughout their journey. Poland, Warsaw, Płock, Puławy, all villages, which have some conditions to stop tourists for at least half an hour, an hour, a couple of hours or finally one days, have to be ready for that. Bearing this in mind, we might say that one of the top state policy objectives is to use tourism as the base for transformation of economic structure, creating new jobs, generating profits for particular regions of the country.

Development of tourism industry may have a special impact on fighting structural unemployment. If we compare a map showing areas of structural unemployment with a map of particular tourist attractions it would turn out that generally these areas do match.

I would like to stress that and ask you to spread this information around. We have assumed that tourism development in Poland will take place according to the model sustaining the existing structures of natural and civilisational environment. It means that this development cannot disturb the traditional social, ethnic, cultural, religious, urban, and architectural structures. First of all, such model implies a balanced quality development of the existing services and enhancement of specific features of destinations, villages, cities, and regions by complementing the necessary infrastructure, and not by construction of tourist centres based on new great investments.

In the economic sphere we fight for the stability of economic conditions, especially those concerning monetary policy, under proceeding liberalisation of tax policy. The state policy in tourism implies that the process of privatisation will go on, the private sector will dominate tourism, and economic subjects will function according to commercial principles. We have assumed that market will be the final regulator of tourism development, and that state interventionism will be limited to minimum. We have also assumed that tourism-related decisions of administrative organs will be taken on the lowest possible level. Therefore, the draft act on promotion of tourism and tourism services for the central organ does not attribute it with powers to take administrative decisions.

Taking into account general guidelines of the state policy for the nearest future and forecasts presented above, we have assumed the following directions for tourism-related activities of the government administration:

1. Development of a system for coordination of tourism-related projects of government administration on the inter-departmental level, with a mediation of a council made up of either vice-ministers or executives of particular departments.
2. Release of a set of activities preventing decapitalization of accommodation base, historical establishments, and activities aimed at adaptation of deteriorating buildings for tourism purposes. This will be dealt with by the recently founded Polish Agency for Tourism Development, comprising of representatives of Agency for Industrial Development, State Sport and Tourism Administration, and the Polish Chamber of Tourism.
3. Intensified activities aimed at increasing efficiency by restructuring and ownership transformation of tourism industry, what equals to acceleration of Worker's Holiday Fund's ownership transformation - that is all those 3 thousand establishments which are open today, and activities of which are partially based on the social welfare system of its mother company, and partially on market principles.
4. Reduction of unemployment and economic recession in resorts and municipalities located in attractive tourist areas or areas adjoining the border by development of tourist services and development of these regions.
5. Initiation of activities, which adjust the Polish tourism industry to the EC legal and economic requirements and standards.

While trying to achieve these goals we should complete the following task:

1. Develop or modify legal regulation, including laws governing economic, financial systems, investments, ownership transformations.
2. Apply directorial recommendations.
3. Initiate activities aimed at approval and implementation of Tourism Services Act. The draft features principles of Poland's promotion, mainly abroad, licences for travel agencies, licences for guides, classification and categorization of accommodation.
4. Adjust our economic structures in tourism to the existing structures in Europe.
5. Define the present and the future role of economic authorities, associations, professional and social organisations. Every country in Europe has a different model for state management in tourism - coordination of tourism is subjected to various departments. In some states there is an independent ministry of tourism, in others there is no such department in the government administration at all. We are also hesitating. We were convinced that putting tourism and sport together was a wrong move. But tourism is activity of persons who travel, and sport is the main tourism product in Zakopane, Augustów, at the sea - so it turns out that it is not such a bad solution after all.

We have to develop a system of information on tourism phenomena and their impact on other economic sectors - Institute of Tourism has done a great deal of work in this field. That implies adjustment of statistics and research methodology to the EC standards, implementation of monitoring and its proper use in management, establishment of a data base, and its exploitation.

We have to cooperate closely with departments of transportation, telecommunication, and nature conservation on the issues concerning sensible and wise exploitation of forests, national parks, landscape parks, which around the world are the top tourism destination areas. Tourism traffic provides financial means allowing for rational management and protection of these areas. It was understood perfectly well in Bieszczadzki National Park, and municipalities embraced by the Park, by the Polish Country Lover's Association. Bieszczady remain the model of rational management, equal to the value of the natural environment. Naturally, I will not quote any negative examples today - we have them in Poland. Two classical fierce conflicts remain unsolved in the south of Poland.

Another important objective for us is development of a new model for marketing and promotion of Poland on selected markets abroad and improvement of work of our national

tourism information centres, situated in Chicago, New York, Cologne, Amsterdam, Brussels, and Stockholm. We want to open another one in London.

And now a couple of words about our series of conferences. What are they for? Generally, they are meant **to contribute to development of the proper state policy in relation between governmental structures and territorial structures, that is municipalities and local authorities.** It is a very difficult thing. We have accepted a concept implying a several dozen direct meetings of executives and employees of the Administration with representatives of municipalities, cities, towns, voivodships, instead of writing instructions or guidelines.

Tourism-related goals of the state administration include:

- activities aimed at increase in expenditures of foreign tourists in Poland,
- animation of local communities, with the stress on adding new services to the tourism offer, backed up by domestic capital and substantial assistance,
- promotion of Poland abroad, especially promotion of longer trips with an attractive package, and weekend trips for inhabitants of regions adjoining to the border,
- activities aimed at quality improvement of services provided by travel offices and accommodation establishments,
- activities aimed at increase in turnover in services of domestic tourism traffic,
- activities aimed at adjusting Polish standards to standards binding in the EC countries,
- activities carried out under programmes for changes and economic restructuring in selected regions of the country with a big tourist potential, e.g. within the STRUDER programme.

What Are the Main Goals of Our Meeting?

1. Getting to know each other. Looking at the list of invited persons, their places of work or activities performed in tourism we see a full galore of characters - beginning with the governmental administration, down to voivodship and local authorities, councils and boards, museums, private economic entities, associations, associations based on natural and cultural environments. And we do want this way of reasoning to dominate. All of us present in this room who represent either the sphere of protection of national heritage or natural environment should note that we are not implementing any great investments. The volume of tourist traffic nowadays does not justify the construction of huge tourist centres. We are now dealing with improvement of tourist services for domestic and foreign visitors and commercialisation of these services in a positive sense of this term.
2. It is important to realize that each of us here has a different perception of tourism and

different expectations regarding our meeting. We have to determine what kind of tourist potential Mazowsze has and what has to be done in order to turn this potential into tourism product.

3. It will be essential to establish tomorrow what are to be the initial steps and to conclude respective agreements between voivodships and/or municipalities. We always suggest first to register what is currently available for sale, who are the providers and who are the customers. Our Office declares its participation in promotion i. e. presentation at tourism fairs or in respective publications. Our financing is always proportional to the extent of activity of the town, municipality, voivodship or union of municipalities in their own tourism product development. When someone will publish a collateral, we shall contribute a necessary funding to have it properly published in four languages, but we want it to include information on accommodation, catering, museums and cyclic cultural events.
4. The most important aspect of this seminar is the conviction that we can do something. So we can accept the situation in which those who do not believe that tourism industry can contribute to improvement of quality of life in their vivodship will leave us today.

Lucjan Niemczewski

Vice-president of SSTA

## Tourism Product of Mazowsze

I was given an ungrateful role as I have to present things some of you know much better than I do myself, although perhaps to the extent limited by the scope of your activities, but you know them in detail and have a more emotional attitude towards them than I have towards the whole region, product of which I have to present.

Everybody was presented a material prepared by Institute of Tourism. It features complete information about the region and I have no intention to repeat it or summarise it in any way. I would like to draw your attention to the fact that our today's conference is focused on a region playing a specific role, and which has good development prospects. Although we are here to talk about tourism product I would like to start from the other side - that is from the existing demand and potential demand for the tourism product. Let me remind you that tourism product is everything a tourist pays for. Therefore, it is such a broad definition that it can match any offer and every offer meant to make a stay more attractive, show places of interest and receive a certain amount of money due for a product or mediation - money which will remain in the region.

In the case of our region we will deal with three types of customers of tourism services. The most troublesome customer is a person who will arrive in Poland, will arrive to our capital and will look at our country, our nation, our cultural heritage on the basis of his impressions from Warsaw, and will then form his opinion about the future of our country. Our second potential customer is a foreign visitor, who due to economic development of our country or due to fulfilment of diplomatic functions, economic accreditation, resides in Warsaw for a longer period of time and wants to spend his free time in an interesting and creative way. He does not only fulfils certain functions here but leads normal life and wants to spend his free time around us. The third, very important potential customer is a big city resident either has or hasn't time or money to go away for a longer period of time, and wants to rest, spend weekend in a place located relatively close to the place of his usual residence. Today we have more free time than we used to have in the previous years - such people we have to provide with an attractive package.

The in-between group are all citizens of our country who want to explore their capital, and students who should get familiar with the capitals' cultural heritage.

These prerequisites attribute the region with a specific role, slightly different from the nation-wide concept presented by minister Paszucha. We are not dealing with issues of trans-border tourism, we have no problems connected with an excessive number of shopping tourists, as it is in the four voivodships adjoining western or eastern border.

If we look at this issue with regard to consumer's needs we may answer ourselves that the potential tourism product is truly rich. Its balance is featured in the study prepared by Institute of Tourism. Although we are a country, which was destroyed by wars, many cultural monuments have been preserved, many have been carefully reconstructed - we are not a country which could be ashamed of something, or has got nothing to show.

And here we are left with the key problem - sale of the product. As far as our sector is concerned we are only at the beginning. If we evaluate development of Poland's tourism potential, and especially if we take a look at Warsaw we are struck by the fact that we do not know how to sell our assets, we do not know how to enhance them in the right way. I am not a connoisseur of classical music but I allowed myself for a comparison of two cultural events. Tickets for the Salzburg Music Festival were sold out three years ahead. It was extremely difficult to get in there. Warsaw also hosted a Mozart Festival featuring all his masterpieces - that is more than was shown in Salzburg. There were absolutely no publications about this event, no promotion of such a great celebration. And so the festival passed unnoticed, although we are a country, in which tourism product in the form of music is one of the top products of its kind in the world. For me, it is an example of great untapped reserves in presentation of tourism product.

We often say that Poland was destroyed by the wars, its monuments were restored, and are not authentic. I had a pleasure to pay a visit to Nieborów, accompanied by a group of experts in this field. It is one of the most magnificent palaces in central Europe. It looks as if its owners left it only yesterday. It is a museum, in which one may have a supper and everything is authentic and taken care of. And it turned out that the actual number of visitors is truly ridiculous. Why is that? It is because our biggest weakness in sales of tourism product lays in lack of an agent who would be the go-between between a product manufacturer and a potential customer who did not get through to the product.

I talked about a large group of international customers residing in Warsaw. Detailed information about them is not available. Everyday Warsaw hosts the average number of 10 thousand visitors from the west. They are journalists and various experts who are not covered by hotel registers.

Although environs of Warsaw are so captivating, its monuments interesting monuments and conditions for active leisure so favourable, we have developed no satisfactory package which

would allow the local population and municipalities to derive income from tourism. Quite recently I met up with people who run small horse breeding centres and small horse-riding centres - it turns out that Mazowsze abounds in such establishments but many of them function in an old-fashioned way. They are unable to serve a potential customer. One would have to speak foreign languages, would have to know how to deal with a group of foreign visitors.

Therefore, our top priority for the period of time to come should be activities focused on organisation of sales of a product we already have.

There is a captivating description of Biała Forest. There are parking lots hidden amid forests. Nowadays, bike rides along forest routes became one of the most trendy forms of recreations - still they require even a fairly modest infrastructure. In fact, there is not a single bike rental company organised in such a way that its customers could get there by car, leave it on a parking lot watched by a guard, rent bikes, take maps with marked routes, descriptions, travel tips- e.g. how much effort a route requires, how many calories will one burn? These are very basic things and no big expenditures are required for that. They only turn our natural environment, which we have in the region, into a product ready for sale - a product which has a certain price on the market.

Another important issue to be tackled by task groups, is the issue of the existing potential. I am sure that today we would never spoil shores of the Zegrzyńskie Lake like we used to do it for the past twenty years - but it is as it is and we cannot change it. We have to introduce this infrastructure into the market with the help of organisational, and marketing activities. The building we are seated in was put on the market in a similar way.

Another important problem is holiday family recreation of Warsaw's residents in resorts with healing climate (like Urle) or others mentioned in the report. They stay far behind as tourism products as our society has become discriminating. A daughter would never accept conditions her mother accepted twenty years ago when she was leaving for holidays in the capital's environs with her children. Sanitary and nutrition standards changed drastically, so have requirements concerning access to the press, and books.

There is a possibility, created by various programmes, for solving the problem of recreation in the urban environs with regard to the biggest Polish agglomeration. This solution would prove to be favourable for owners of accommodation infrastructure, and who would appreciate additional summertime income.

Residents of Warsaw, who want to spend most of summer or winter holiday outside the capital, cannot or do not want to travel to distant places, have few offers. Mazowsze has got

perfect natural conditions for recreation. We only have to initiate suitable activities in these six voivodships, including Warsaw.

Possibly yesterday the European Community decided on the next programme, which will provide help aimed at tourism industry development. The program includes a whole section devoted to tourism outside the urban environment. And nothing prevents us from implementation of this programme, especially in this region, searching for common action plans.

The region is very privileged if we look at transportation network. First of all, we have an international airport, which today is the hallmark of modern Poland. There is a good rail network in Warsaw and in the region. A crossing of two basic road thoroughfares, i.e. West-East and North-South highways. This way, the region will have the possibility for further development of incoming tourism secured.

The Warsaw team will discuss the issue of tourism product organisation in Warsaw, a city with centuries-long tradition and a vast potential. They will think about ways of presenting it to foreign visitors. I think that if all projects we will discuss in particular groups will be put together and we will work out a joint concept for tourism development in the region, we will achieve our top priority objective - increase in incomes of the local population.

Czesław Jermanowski  
Director General of SSTA

## **Tourism Promotion with Stress on Regional Issues**

Marketing in tourism concerns everybody, starting with the government administration, down to the regional level, local authorities, manufacturers of tourism product, tour operators as well as agents who sell the product. Marketing is a technique which makes things objective. It puts values and infrastructure into the tourism dimension. A similar situation happens with the culture - if a poem composed by a poet is kept in a drawer than judging from the cultural point of view it does not exist. It has to be objectivised by social communication. It is the case of tourism product. I gave such an example because we often think that it is enough to have a nice building, beautiful traditions connected with establishments, units, historical personages and that it is sufficient. It is not enough.

It is also not true that when we meet up here and leave this place, when our meetings are over we have all tools we need and that everybody will be convinced that our concepts are right. Our activities have to imply that one must carry out tourist promotion as such, as a field with great development prospects, we have to learn how to develop our argumentation. I would like to quote some cases, important for development of an efficient argumentation. Most of us return to our region and usually the majority is against us. It is also our fault that a town mayor stays alone, is not successful with tourism-related issues. At the same time, we know that values we analyze, the whole dynamics of tourism shows tourism is the sector we may win with.

In 1980 about 285 million people motivated by tourism purposes travelled around the world, whereas in 1991 it was 450 people - these figures are very telling. It is a volume which makes me think whether in my own case - of a person who is in the centre, in the voivodship, in the local government this dynamics is also taking place?

The structure of tourism traffic in Europe is very favourable for Poland. A World Tourism Organisation study focused on this issue features this dynamics in the European spatial arrangement. Data on tourism destination areas tell us we have a chance.

And now motivation. What governs the modern tourist? Research conducted in 1960s show that predominant were motivations associated with southern part of Europe. Nowadays, the leading role is played by cognitive purposes with the stress on culture. Ecology takes the second standing. The third motivation is health, understood as lifestyle.

All the three motivations I have just mentioned are favourable for Poland. If it is so we have to see how is the state of our open space. Are we ecologically OK or not because we are not able to drag the Mediterranean over to Poland. We have to make our lakes and rivers clean and develop a whole system which will take care of it.

Everything is implemented according to the theory that first of all we have to convince others, and only then take the next step. Tourism is a field which takes the third place in the world export. Sometimes we made mistakes in publications. In the world export the fuel industry has got 9%, motor industry 7.5%, and tourism 7.4% and has the greatest dynamics. Therefore it will take leading position. And if it is so we risk nothing if we stake on tourism.

With regard to particular markets - while developing the promotion concept, we have to clearly define particular segments in the spatial arrangement, identify and analyze them, and then apply a selected technique. Then, the space will proceed to generate tourism traffic.

Marketing activities of our government administration are preoccupied with "promotion of Poland as a tourism country, creating a more favourable image of Poland, promotion of selected regions and forms of tourism". It is stimulated by various activities aimed at increase in number of travellers, extension of stays, enrichment of offers.

What about our key markets? The first group is made up by Germany, Scandinavia, the United States and the Benelux countries. These are our key markets and there we put our National Tourist Information Centres. They deal with promotional activities - cooperation with mass media, tour operators and carriers, as well as market watching, analyses, gathering data for themselves, the centre, and various units in Poland.

In countries, in which we have no information centres, we cooperate with Orbis, LOT. We cooperate with Orbis because it is important abroad for several reasons - it acts as a touroperator and cooperates with agents. We are also cooperating with other non-Polish tour-operators.

Our region appears as an attractive area and meets all criteria applied in promotion. What activities should we undertake? Participation in tourist fairs, exhibitions, tourist films, press campaigns on the radio and television - we do it abroad together with conferences, and promotion venues. Journalists invited by international governments, various cities, tour operators travel around the world. They are welcomed by the best hotels, restaurants, best packages which are meant to convince them, gain their sympathy and provide them with an incentive to write good promotion features.

I tried to present the way of reasoning we follow. It is important we could communicate with each other, exchange views and cooperate. In tourism we are simply doomed for success and that we will owe to ourselves.

**Bohdan Jastrzębski**

**The Voivode of Warsaw**

## **Tourism Promotion for the Warsaw Voivodship Implemented by the Warsaw Voivode Office.**

The position a voivode is a such one in which possibilities are incomparably smaller, as compared to the scope of responsibilities. In such situation if we want to function in the proper way and achieve objectives we take on group work and partnerships. Under such circumstances people who are directly responsible for tourism in our region should speak up.

I would like to introduce some issues. It is obvious that despite various activities resulting in deterioration of Warsaw's environs, the region has not been completely demolished and one may even distinguish several areas with important recreational and tourists features. Development of these areas will be surely interesting from the point of view of possible sales of tourism product. It seems that in the region of Warsaw, and we are discussing the whole region of Mazowsze, one may point out to three areas. The first one is a very attractive area spreading onto the valleys of the Vistula, Bug, and Narew. The second one is the area of Kampinoski National Park, which is a unique establishment of a homogenous forest area situated in the vicinity of a such a big urban agglomeration, and having such good access. The third area we may call an intersection of two big forest areas: one running from Dęblin to the region of Różan and second one running from Bolimowskie forests to Mazowiecki Landscape Park.

I think that when formal procedures connected with establishment of the so-called areas of protected landscape will finally come to an end, a vast part of the Warsaw region will be subject to legal protection of landscape, and legal nature protection. It means that in the future areas, which are suitable for tourist and recreation development will not be devastated like it was before when we were building Warsaw steel plant not far from Kampinos.

I also would like to say how the Voivode Office defines the role of tourism and tourism product in our region. I believe that it is one of the absolutely underestimated elements of Poland's national income. It is a product, which may stimulate a dramatic increase in the national product - on the condition that we will know how to handle it.

There is a very favourable approach towards this issue in the region and I believe that it is better to develop the national income or animate economy of the region by tourism development rather than by development of heavy industry. Another element embodied in our approach is the assumption that unless the issue will not be handled by local governments

there will be no tourism development and no growth in this field. We cannot command tourism development in the Warsaw region on the central level. If we do not do it ourselves, on the municipality level, on the level of local authorities, if we show absolutely no initiative we may as well organise another 20 follow-up conferences and nothing will ever come out of it. Somebody has got to develop the infrastructure for small tourism business, somebody has to manage small village inns, little hotels etc. We have to create a network of small and cheap hotels ready to put up a mass customer, young people from the West who are curious how our countries look like after 50 years of rule of the communist regime. They will come to Poland but will not stay in the Marriott hotel or even a one-star hotel because they are too expensive for them. Naturally accommodation establishments have to meet certain quality standards : hygiene, catering. So we have to stimulate initiative of local authorities in this field. Naturally, local authorities or municipalities will do nothing on their own. I am talking about creating a favourable atmosphere, what may be done by a positive attitude towards such investments, activities, and projects. It would be as good as a newly opened shop. We have to acknowledge the fact that these are services which should receive support, and which are backed up by municipality boards etc. It seems to me that it is high time municipalities established communal interest unions.

Summing up - I would like to say that the question of tourism in its material sphere belongs to competencies of local authorities. We will do everything to support such activities as we believe that it is a direction which requires little money from the outside and is able to give employment to thousands of people. We have to think of ways for cheap tourism product development. I suggest we should give a weekend product a thought as well as think of developing good conditions for recreation for not really well-off and poorer people from Warsaw's urban agglomeration. So it seems to be an exceptionally promising task for local authorities.

At the end I would like to say a couple of words about the future. I believe that we are not fully aware of the great changes in migration brought by demolition of the Berlin Wall and an end to the "Iron Curtain". In our lives and expectations we tend to refer to familiar data and it looks like, for instance, 1950 it was like 1960 and in 1970 it was - and based upon this we forecast: it will be like in... Naturally, dates I have just mentioned are not landmarks - it was simply an example. Please do remember that the so-called functions and intervals for checking certain functions are sometimes strictly defined. And if somebody wants to apply a equation with regard to a period or an interval, and it does not work out in a given interval please take the blame on yourself - admit you could not match the function with the right interval.

Now I would like to remind you about an issue you are probably unfamiliar with. 1946 activities of the Swiss government were a typical example connected with the topic of our

today's conference. The government asked its best experts a question - what should we do, what prospects and chances await our developed sport and tourism industry?

As we all know before the war Switzerland was the Mecca for all skiers and people who practised mountain tourism.

After a couple of months experts produced a thick report. Their recommendations were as follows: for the next 30 years development prospects for the Swiss tourism industry are close to none. Hotels should be closed or turned into sanatoriums, skiing and alpine instructors were suggested to immigrate to the United States, where the Second World War left the country almost intact. Of course these were recommendations resulting from the evaluation, drawn on the basis of the prewar model of social behaviour.

And what happened? In 1950, that is four years later, the number of tourists exceeded pre-war records. I would dare to say that we are currently in a very much similar situation - that the quality change, i.e. setting free 300 million people who used to be unable to travel, generates results we are getting familiar with. For instance I did not know that over one million Russian tourists stayed in Warsaw's hotels last year. So we have to realize we are in a "tourist whirlwind". In my opinion it is a very stormy process. I am saying that because it is a field, in which investments pay off. For this particular reason we intent to organise Modlin airport, which we used to plan as a cargo airport. Has anybody here seen a European or even a world capital of a 40-million state, with a capital of 1.7 million residents, which has only one little airport built into the city centre? If we take into account turbulent development of migration of people and goods around the globe then location of Mazowsze, location of Warsaw, location of Modlin will appear strategic in the global arrangement - it is a perfect place for the whole Far East, which will prefer to enter the Russian market from the west as it is inhabited by fourth-fifths or three-quarters of pre-Ural population. From Modlin, from Warsaw, from Mazowsze it is closer than from Bangkok or Tokyo. So we have good development prospects. The point is to see and use them.

**Andrzej Kern**

**Sport and Tourism Department of the Voivodship Office in Warsaw**

## **Tourism Promotion in Warsaw Voivodship**

I would like to present possessions of the Warsaw voivodship and our activities - that is all things we did and intend to do in the sphere of tourism promotion for our voivodship. I would also like to supplement information presented by Mr Jastrzębski with some data. As far as areas suitable for active tourism, weekend recreation and longer stays are concerned - I would like to stress the role of Kampinoski National Park. It is an area of over 35 thousand hectares, in which about 75% is forested land. Zegrze Lake is over 30 sq. km., its shores are surrounded by various centres, varied in standard - usually low due to poor maintenance. Mazowiecki Landscape Park and Chojnowski Landscape Park add flavour to these two holiday destinations. The voivodship boasts some more notable destinations, besides Warsaw. Worth mentioning is Czersk, Góra Kalwaria, Jabłonna, Zakroczym, such health resorts as Otwock and Konstancin-Jeziorna. The voivodship also features over 200 accommodation establishments offering the total number of over 25 thousand places, in which 15 thousand may be occupied all year round. Unfortunately, these are usually high standard establishments. We do not have an average-standard base suitable for the middle class, students, and young people. Establishments located in the environs of Warsaw are generally suitable for weekend breaks, and short stays not in the best conditions possible. At the same time we also notice good things - small hotels are being erected on the outskirts of Warsaw - these are private units, their number still remains insufficient. I think that major obstacles are formal and legal problems and economic difficulties. It is one of the problems which has to be solved in the future, and it lays with department authorities.

We also notice an improvement in catering services. Better catering services are now available throughout the voivodship. There are over 500, mainly private travel agencies operating in the Warsaw voivodship. I believe that the licencing system, which will become a legal regulation, will guarantee quality services and will become a recommendation from the state administration.

That is all as far as our possessions are concerned. Now I would like to say a couple of words about promotion activities undertaken by our Office. A Centre for Tourism Promotion in the Warsaw Voivodship, attached to WOW "Wisła", was established - we support and finance it. The Centre deals with gathering and processing of tourism data, prepares catalogues, offers, e.g. investment offers. We have already prepared such a catalogue - it features 70 offers from over 28 municipalities. I am sorry to say but we have not a single offer from the city of Warsaw - only offers from the voivodship. It makes putting offers and clients together

difficult. Most of our customers are interested in Warsaw itself rather than in the environs. The catalogue was presented during the Investor's Forum in Cracow, in 1992 and was sent out to Polish National Tourist Offices. The Centre will also handle development of packages for sport, recreation, tourist events and preparation of a calendar of events and publications. And while talking about publications we have something to be proud of in this field. We have already published several titles, including *Accommodation Establishments of Warsaw Voivodship*, which is a tourist guide book, *Natural Values of the Voivodship*, *Monuments of Warsaw Voivodship*, *Car Trips Around Warsaw's Environs*, a booklet focused on activities of "Wisła" - Warsaw holiday centres, a catalogue of investment offers, a leaflet entitled *Welcome to Mazowsze*, a tourist map of Mazowsze, *Welcome to Mazowsze* poster, a leaflet on *Manor Houses of Mazowsze*. This year we will publish two more titles - a booklet entitled *Palaces and Castles of Mazowsze* and a *Welcome to Kampinoski National Park* leaflet. Together with State Sport and Tourism Administration we organise manpower development courses. We also want to sustain active tourism, thus for years we have been competing in organisation of such events. The biggest venue, is called Warsaw Tourism Days. The competition includes evaluation in organisation of particular active tourism events organised by the Polish Country Lover's Association. Last year we have organised the Silver Pan Contest, to be won by the best restaurant in the voivodship. It used to be a very popular contest but it has been not organised for the past three or two years. Now we want it to be a permanent item on our calendar of events. Last year the competition was joined by over 30 catering establishments.

What do we intend to do? Naturally, we want to go ahead with publications - we hope that we will receive some support from the State Sport and Tourism Administration in this field. We will surely cooperate with municipality authorities, and to a much greater extend. Last year, together with several municipalities located on the outskirts of Kampinoski Park and in the Park, we made an attempt at establishing a union of municipalities, which would deal with their promotion. We were not successful but we are not giving it up, and we plan to come back to this issue next year. Right now we want to concentrate on the Modlin stronghold zone. It would make an excellent tourist zone - animated commercial and economic activities will be stimulated by development of a new airport.

The regions of Konstancin and Otwock, both representing high health treatment and recreation values, still remain unutilized. In order to change it we will closely cooperate with municipalities located in the region.

I have not mentioned Warsaw yet - it is a separate issue. Joint activities carried out together with the Office of the Capital City of Warsaw are important for us. In my opinion, the city has got no proper tourist information. Therefore, to my colleagues of the Office of the Capital City of Warsaw I would like to offer joint activities in this field, in cooperation with

the Central Agency for Tourism Information so in the future you can be proud that there is tourist information in Warsaw and it functions perfectly well.

Every conference is completed with a signature of an agreement between voivodes representing a given region. We have speeded up the course of events. Together with colleagues representing departments from particular voivodships we have already organised such working meetings. Joint activities have already been initiated this year. These were joint publications, and the region of Mazowsze participated in tourist fairs in Warsaw and Poznań. We plan to have one stand for the region of Mazowsze in Berlin next year.

Together, as a region, we would like to publish collaterals, develop a complex information about investment offers, organise a calendar of tourist, sport, and cultural events, which would also feature offers for weekend breaks - also for tourists who while visiting Warsaw could go away for a weekend to Pułtusk, or Płock. We expect such offers from our colleagues working in particular voivodships. Our international visitors expect it, too.

These should be two or three day trips, preferably weekend breaks. We want to cooperate with municipalities on agrotourism development, which is popular and very trendy. Warsaw voivodship, as well as others, features a galore of typically rural destinations, which often make perfect holiday destinations - these are potential destinations for our customers. Finally, I would like to say that we have no intention to give up on training for professionals. We want to initiate trends which have not been and are not functioning - that is the souvenir business devoted to the region of Mazowsze.

And the final remark - fund raising for all those activities. Several of our activities are focused on that. I believe that our inter-voivodship cooperation, initiated and yielding benefits for all parties, and officially consolidated by this conference, will bring benefits to all of us.

## Planning and Marketing of Bigger Tourist Events for Big Cities

### The Role and Types of Tourism in Big Cities

Capitals and big cities, seats of local authorities, centres of production and distribution are the traditional clusters of five types of tourism:

**Official state and court tourism** - resulting from the role of big cities as seats of state institutions and public administration, and royal courts.

**Business and Professional Tourism** - due to concentration of commercial, banking, insurance, investment and industrial functions characteristic for public and commercial activity centres.

**Shopping Tourism** - resulting from regional, domestic, sometimes even international or world specialist shopping functions in key transportation points, centres of commercial exchange, crossroads of free flow of people, ideas, goods, and transactions.

**Tourism connected with conferences, conventions, meetings and exhibitions** - these specialist forms of business and professional tourism result from the broad scope of functions performed by a big city, they strengthen and consolidate its commercial, political, and interactive functions.

**Visiting Tourism** - this type of tourism may be important with regard to quantity and social impact due to administrative and managerial functions performed by a city on a vast area, big number of inhabitants or in relation to migration of people taking up jobs in the city.

Three other types of tourism may be associated with big cities. They require acknowledgement of other variables and may show significant differences while applied to different cities. These are:

**Cultural and Sport Tourism** - this type of tourism is connected with three types of resources:

- cultural heritage in the form of museums, galleries, monuments, historical sites, operas and theatres, magnificent architecture, birthplaces of famous personages, historical palaces, castles, parks, and gardens;
- sport establishments and teams - stadiums and rings, seats of famous sport clubs, associations, and teams;
- venues and events - cultural, sport, parliament and court events, night life and entertainment, traditional historical events, reconstruction of events, single, occasional or special events.

**Religious or pilgrimage tourism** - connected with major sanctuaries and sacred places, venues of religious pilgrimage (e.g. Rome, Jerusalem, Mecca, as well as Częstochowa, Warsaw and Katyn - as far as martyrdom is concerned); places featuring great cathedrals, mosques, monasteries, shrines or relics of the saints etc.

**Holiday Urban Tourism** - this type of tourism may be stimulated by a magnificent town-planning arrangement, big boulevards, monumental buildings and attractions of a given capital (e.g. Washington, Delhi or Canberra), as well as parks, public gardens, museums, and monuments. Shopping, leisure (e.g. London, New York, Paris, and Berlin) as well as gala cultural, sport, or even political events draw people like magnet. Cultural tourism combined with shopping and business tourism make big cities appear as particularly attractive destinations for holidays and short breaks taken during all seasons.

To what extent we may and should accept this function of urban tourism as a certainty, or treat a city as an important area of activities aimed at product development and marketing? While analysing this issue, Van der Borg (1991) drew up a conclusion that in order for urban tourism development to be justified three basic conditions have to be met :

1. *A city should have an attractive image.*
2. *A city should have at least several solid components of what may become a competitive tourism product.*
3. *Expected long-term benefits from development should exceed long-term expenditures.*

(Van der Borg, 1991)

He also says that a defined group of external conditions may help or hinder the process of urban tourism development, and so:

- *economic situation of a city (degree of openness of its economy, efficiency of functions already implemented by the city, possessed potential, exclusive of tourism, scope of differentiation). Tourism flourishes best in a (potentially) strong economic centres.*
- *Conditions regarding the existing potential of accommodation infrastructure and possibilities of adaptation of the existing supply to demand changes.*
- *Geographical location in relation to renown tourist destinations,*
- *Position in relation to surrounding municipalities,*
- *Traditional attention drawn by local authorities, enterprises, and inhabitants to factors limiting city development.*

(Van der Borg, 1991)

Table 1

Number of arrivals, overnight stays, and average duration of stay in selected European cities  
in 1991

| City       | Arrivals | Overnight stays | Average length of stay |
|------------|----------|-----------------|------------------------|
| Amsterdam  | 1730556  | 3785724         | 2,19                   |
| Antwerp    | 247210   | 1026097         | 4,15                   |
| Athens     |          |                 |                        |
| Barcelona  | 1818609  | 4089509         | 2,25                   |
| Berlin     | 2542226  | 6405098         | 2,52                   |
| Bern       | 259063   | 531284          | 2,05                   |
| Brussels   | 2045800  | 3035000         | 1,48                   |
| Budapest   | 1555863  | 5032401         | 3,23                   |
| Koln       | 570869   | 2514866         | 4,41                   |
| Copenhagen |          | 3157000         |                        |
| Dublin     | 2522000  |                 |                        |
| Dusseldorf | 1010371  | 1851138         | 1,83                   |
| Edinburgh  | 1386400  |                 |                        |
| Florence   | 1799351  | 4159929         | 2,31                   |
| Frankfurt  | 1863168  | 3442828         | 1,85                   |
| Geneva     | 920810   | 2327651         | 2,53                   |
| Hamburg    | 2156953  | 4071619         | 1,89                   |
| Helsinki   | 1365210  | 1291811         | 1,92                   |
| Istanbul   |          | 2986467         | 2,19                   |
| Lisbon     |          |                 |                        |
| London     | 14700000 | 82600000        | 5,62                   |
| Lyon       |          | 2785900         |                        |
| Madrid     |          |                 |                        |
| Milan      | 2135197  | 5579129         | 2,61                   |
| Munchen    | 3242743  | 6607551         | 2,04                   |
| Oslo       | 941985   | 1572760         | 1,67                   |
| Paris      | 12602168 | 28269280        | 2,24                   |
| Prague     |          |                 |                        |
| Rome       | 2683895  | 12018523        | 4,48                   |
| Salzburg   | 961921   | 1975859         | 1,95                   |
| Stockholm  |          |                 |                        |
| Venice     | 1111456  | 2508595         | 2,26                   |
| Vienna     | 2637572  | 6717752         | 2,55                   |
| Zurich     | 963842   | 2012467         | 2,09                   |

Source: KPMG; Borg & Costa (1993)



Table 2

Changes in tourism demand in selected European cities by number of overnight stays,  
between 1987-1991

| Cities     | 1968 | 1989 | 1990 | 1991 |
|------------|------|------|------|------|
| Amsterdam  | 1,04 | 1,06 | 1,12 | 0,94 |
| Antwerp    | 1,09 | 1,1  | 1,05 | 0,96 |
| Athens     |      |      |      |      |
| Barcelona  |      |      | 1    | 1,05 |
| Berlin     | 1,03 | 1,1  | 1,1  | 0,98 |
| Bern       | 1,01 | 1,06 | 1,05 | 0,96 |
| Brussels   | 1,02 | 1,19 | 0,99 | 0,99 |
| Budapest   | 0,89 | 1,02 | 0,79 | 0,76 |
| Koln       | 1,15 | 1,1  | 1,09 | 0,97 |
| Copenhagen | 0,97 | 1,05 | 1,02 | 0,97 |
| Dublin     |      |      | 1,08 | 0,99 |
| Dusseldorf | 1,05 | 1,08 | 1,12 | 0,92 |
| Edinburgh  | 0,99 | 0,92 | 1,33 | 0,51 |
| Florence   | 1    | 1,06 | 0    |      |
| Frankfurt  | 1,08 | 1,06 | 1,03 | 1,03 |
| Geneva     | 0,94 | 1,06 | 1,11 | 0,91 |
| Hamburg    | 1,1  | 1,09 | 1,06 | 1,03 |
| Helsinki   | 1,04 | 1,03 | 0,96 | 0,83 |
| Istanbul   | 1,26 | 0,92 | 0,97 | 0,81 |
| Lisbon     |      |      |      |      |
| London     | 1,28 | 1,1  | 0,96 | 0,9  |
| Lyon       | 1,11 | 1,08 | 0,99 | 0,99 |
| Madrid     |      |      |      |      |
| Milan      | 1,07 | 1,15 | 1,01 | 0,96 |
| Munchen    | 1,02 | 1,08 | 1,05 | 0,95 |
| Oslo       | 0,98 | 0,94 | 1,09 | 1,03 |
| Paris      |      |      | 1,05 | 0,91 |
| Prague     |      |      |      |      |
| Rome       | 1,02 | 1,05 | 1    | 0,93 |
| Salzburg   | 1,04 | 1,13 | 1,08 | 0,96 |
| Stockholm  |      |      |      |      |
| Venice     | 1,03 | 1,04 | 1,04 | 0,91 |
| Vienna     | 1,07 | 1,07 | 1,09 | 0,92 |
| Zurich     | 0,96 | 1,05 | 1    | 0,94 |

Źródło: KPMG; Borg & Costa (1993)

In 1993 KPMG Consultants conducted a survey research on urban tourism between 187-1991 for the city of Amsterdam. The research focused on 34 European destinations, which may be a competition for Warsaw as a urban tourist destination. It was a critical period for

development of strategy for tourism development in big cities, and marketing strategy. KPMG's data is a unique source containing estimates of arrivals and overnight stays in major cities and an average duration of stay. The research clearly points out to importance of these cities as a short-break market.

## Development and Planning of Major Events in Big Cities

In the 80s a bigger number of papers and research studies was devoted to particular events and their impact on certain cities. The first broader review in this field was an excellent doctor's thesis by Armstrong, written in 1985, previous to an Aiest Congress in Calgary in 1987, which recognized *Impact of Mega-Events on Travel Purposes* as a fully fledged field of research. Subsequent articles and books by Getz devoted to this issue as well as Wiley's last year's book *Mega-Events* clearly indicate that it is a new dynamic field of research, treated very seriously, and with great attention.

We traditionally associate mega-events with certain cities, for instance : The Goose Fair with Nottingham in England, the Lord Mayor's Show with London, the Christmas Fair with Munchen and Dominican Fair with Gdańsk. These are specific local events, which to a greater extend tend to acquire tourist functions.

Nevertheless, the distinctive feature of the past 10-15 years, both in Europe and in Northern America is utilisation of these special, usually mass events (i.e. intended to draw a million or more participants) not only as a way of gaining prestige and image of a host-city, but also as a factor allowing for release of two principal projects:

- using events **to improve urban infrastructure, equipment, and facilities** (e.g. airports, underground, highways, stadiums, harbours, central boroughs etc.). Exemplars of this are Montreal, Munchen, Vancouver, Barcelona, and Sevilla
- **using events and complementary investments for animation of economy** and release of a broader programme for **material and economic** reconstruction of big urban centres (e.g. Perth and Cup America races and candidacy of Birmingham for the Olympics etc.)

This way planning urban events and metropolitan strategies became basic tools in the still-increasing arsenal of city and city development management, during the period of adaptation and economy restructuring in developed countries. And so, as Getz indicates (1991):

*Cities and countries fiercely compete for organisation of international fairs, exhibitions and Olympic Games, and the latest anniversary of United States captured attention of the whole world.*

Getz explains in detail why the number of various special events in on the increase, and for what reasons in 1989 Canada considered promotion of *Position Paper on Festivals and Events*, in which this agency of the Canadian government attempted to take on the role of an agent in this field, important. Van der Borg (1991) expresses his and Klaasen and Van der Meer's opinion saying that: *strategic marketing for big cities has to become the focal point of town-planning policy.*

Over the past five years tourism marketing, planning events, and marketing as an element of a strategic policy for big cities, have moved a couple of grades up in the hierarchy of priorities. We may quote here a very eloquent example of the Welsh Tourism Board, which devoted a whole chapter to programming for urban tourism in its project of tourism strategy from 1993, evaluated available products, set strategic goals in this field and defined markets for urban tourism in Wales (table 3).

Table 3

**Target markets**

Key markets for urban tourism are:

- **Short Break Market** - capturing tourists expecting high standard hotel services. In the daytime tourists from this group want to participate in interesting (active) activities, in the evening - in various forms of entertainment, especially cultural.
- **Incoming Tourist Market** - market of those fond of admiring attractions connected with British art and cultural heritage as well as attending art pageants. Cardiff, due to consolidation of its international character as a capital city, plays an important role in serving incoming tourism to Wales. The interest of international tourists in Wales will become increased due Swansea proclaimed a City of Literature of 1995 and international recognition of works of Dylan Thomas.
- **Business Tourism** provides work to the majority of employees in accommodation establishments (especially hotels with more than 10 rooms). Favourable location of Cardiff, Swansea and Newport stimulate their increased share in services for the market of business tourism, and especially conferences, business meetings and exhibitions.
- **One-day trippers** are most interested in prospects for shopping, sightseeing, and seeing attractions. They may also constitute the mainstream of visitors to most attractions, and their impact on the Welsh tourism product development is on the increase.

(Welsh Tourism Board, 1993)

## **Sport and Art Events; Exhibitions and Open Air Festivals: Possibilities and Constraints**

Big cities taking their first steps in the field of mass events and marketing believe that they have a broad scope of possible options, and money is the only constraint. Due to my experience from research work connected with putting forward the candidacy of Birmingham for organisation of the Olympics, participation in the Olympic Congress in Calgary, and participation in works on a PIEDA Study for Birmingham: "Proposal of Organisation of International Exhibition (EXPO) in Birmingham, certain issues seem to be completely clear to me, and so:

- Long time of anticipation on the application list, increased competition and the politically-guided decision-taking process of the International Olympic Committee cause that in the nearest future few big cities will get a chance to organise the Olympic Games.
- Although it is not commonly known, there is an equally complex and controversial long-term process connected with an international control body (Bureau International des Expositions - B.I.E.) deciding which cities may organise particular major exhibitions, expositions, flower festivals etc., when, and on what scale! So not only big sport events but also all major exhibitions and prestigious art events are controlled and planned long time ahead.

### **Case Study Birmingham:**

#### **from Candidacy for the Olympics to strategy of events:**

Birmingham has one million inhabitants and dominates in a conurbation inhabited by almost 3 million people. It is an industrial conurbation, in which the productive role has been significantly diminished, and services are well developing. Loss of 200 thousand work places in 1970s lead to a serious analysis of economic policy, acceptance of new development strategy and concepts aimed at using events to animate interest, draw investors and create new jobs in the city.

A sudden submission of the city's candidacy for the host of the Olympic Games in 1980s was produced by combined ideas of a delegate to the local parliament and the former Minister of Sport (Dennis Howell MP), the head of Urban Recreation Administration (Mr Munn) and two chairmen of a Town Council Committee, with support of a dominant group in the Council. Proposals were mature and had a solid fundament, but the fact that on the political side the city was not ready to play games with the International Olympic Committee and neglected the waiting time and system of activities by lobby (groups of informal pressure) caused that Barcelona won at the "right" time.

The city spent about 5 million pounds for this unfortunate process of candidacy. It was a very effective investment although not crowned with the Olympics. It paid off very well in the form of new urban investments financed and carried out by the private sector, as well as determination of the city to change its image quality of spatial development. Thanks to this initiative a new art and congress centres was erected, the quality of inner city environment was improved, the city centre was closed for vehicle traffic, a national opera group and the second English ballet was installed in the city. A world class concert hall was constructed for the use of the city's own great symphonic orchestra - CSBO, also a new theatre district, China town, and a complex film, mass media, and art centre were created as a fundament allowing for converting the city into the "Art Capital of the English Country". An investment programme of some one billion pounds was financed from public and commercial funds. Its implementation in the process of city transformation resulted in creating of some 100 thousand new jobs in Birmingham.

In order to consolidate this favourable situation, the city commission a feasibility study to a PIEDA consulting group. The study was to be focused on event strategy. It was meant to broaden existing possibilities gradually, allowing for organisation of regional events and some domestic, both sport and art events, then lead to a situation, in which the city would be capable of organisation of domestic events, then European, and eventually international. Volume 7 of PIEDA report contains several information, which may be interesting for Warsaw. Conclusions from this report regarding drafting and carrying out a permanent programme of events is as follows:

Three stage development, initiated in 1991:

- 1) initial stage leading to
- 2) events of the intermediate stage (1997-98) (essential plus supporting events) at domestic/European scale, leading to:
- 3) World Expo in Birmingham in 2003.

Substantial recommendations resulting from the *Birmingham Case Study* resolve itself to the fact that the city attempted at implementation of several inter-related issues:

- decided on such a strategy for economic development, spatial development, and management, which generated a broad scope of new elements of employment in services, supplementing and strengthening productive and service functions of the city.
- used its central location in the country in the best way, developed and improved transportation and communication infrastructure: highways, new airports, gas stations and bus stops.
- prepared and implemented plans regarding quality of the environment, development of art as well as conferences and conventions offering high quality products to inhabitants and guests.
- consultants proposed a programme of events, which would broaden and supplement

existing events, thus creating a fundament for bigger new events with a broader scope of range.

- uses its own excellent marketing agency (the Birmingham Convention and Visitor Bureau) not only for the best exploitation of its facilities serving business, conference, and fairs, but in order to gradually introduce shopping and holiday tourism in the offer, at the same time creating a base for development of sport and cultural tourism events. Conductive are fairs, markets, conventions, and exhibitions. The marketing agency (BCVB) has an annual budget of 1.5 million pounds for implementation of its objectives.
- recognises and appreciates the role of sponsoring in development of events attended by tourists. It is sponsoring and new look at financing Los Angeles Olympics that caused that we now have five or more cities competing with each other for organisation of Summer Games, whereas at the time of Montreal, or even Munchen high costs of games discouraged cities from applying for their organisation.

### **Implications for Warsaw and the Region of Mazowsze**

Current marketing material promotes Warsaw (but not its region) in some aspects connected with the present speech:

- as a place for conventions, conferences, congresses, meetings,, and fairs. The Convention Bureau run by ORBIS carries out such promotion: to a greater extend it is also done by particular Warsaw hotels.
- *The East/West VIP Business Travel Guide to Poland* presents a vast feature on Warsaw. In national and regional advertising we come across information about how much Warsaw has to offer in the field of music, culture, museums etc, but so far only one leaflet of ORBIS focused on short breaks in Warsaw. It is not an offer as it does not quote prices for accommodation, transfers, museum tickets, or admission to cultural events, what should be normally included in a package.

Warsaw is unestimated, on both international and domestic markets. It may be because there is no agency, which would deal exclusively with marketing, packaging, promotion, and sale of tourist services in Warsaw and Mazowsze. Events held in Warsaw are advertised insufficiently on the local market, not to mention domestic or international market. Attendance on the Mozart Festival, Modern Music festival and many other cultural events is dreadfully low. Bigger cultural events, often of very good quality, are barely advertised, not offered as an element of tourist packages on domestic and international marker, and therefore, they often appear as sad and forgotten.

Therefore, if Warsaw and its region want to enter the zone of event tourism, they have to

settle the essential issues and initiate joint organisational and marketing activities. Planning new big events makes no sense as the existing ones limp along due to lack of advertising, tourist packages or even simple "offers" for domestic and international market.

In my opinion, the city could consider a concept of establishing a Visitor and Congress Bureau for Warsaw and Mazowsze, imitating solutions accepted in Birmingham and Barcelona. Such agencies are partially financed by the public sector, and partially by the sector of commercial tourism. They may carry out their activities ranging from organisation of conferences and conventions to sales of packages including events (cultural and sport), shopping, short entertainment breaks), etc.

A strong city is very favourable for its region, still it should take care of drawing up complementary offers - combined tourist routes, combined cultural events and additional stays in centres situated outside Warsaw. Connections between Chopin events in Warsaw and Żelazowa Wola are pretty obvious but also in relation to other destinations and routes biased and combined urban and rural offers could make an interesting option for guests.

An intermediate stage in the event strategy of Birmingham (Events 1997-98) is something Warsaw, having its activities coordinated, could quickly accept. WTB's target plan of urban tourism segmentation could be adapted easily to Warsaw conditions. It is far too early to consider organisation of world sport and cultural events in Warsaw. Expo in Sevilla cost 4.3 billion pound for infrastructure and 380 million for land adaptation and construction. Not only lack of some resources but also small competitiveness of Warsaw with regard to quality of shopping, air conditioning, quality of drinking water and urban environment puts it on a very unfavourable position, even if its lower prices seem to give it a significant predominance over competitive cities.

## **Conclusions**

The paper discussed urban tourism, and especially the developing a field of planning and marketing for bigger tourist events in big cities. I hope that what I have said clearly indicates that this field has many good points, there are some essential initial conditions which have to be met by a city before it could release efficient activities in the increasingly competitive field of urban tourism. The Warsaw miracle and the way this city raised from ashes in 1940s indicate not only the power to survive but also the power of inspiration and victory. Small steps may lead to development of a solid fundament of yet another aspect of modern economic development of this amazing city and a great capital.

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- Appendix 1: *BIE Overview*
- Appendix 2: *International and National Experience of Major Events*
- Appendix 3: *Strategic Infrastructure and Facilities*
- Appendix 4: *The Scope of Sponsorship*
- Appendix 5: *The 1992 Event*
- Appendix 6: *2003 Theme Development*

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Krzysztof Łopaciński Ph.D.

Director of Institute of Tourism

## The Role of Analyses and Research in Tourism Product Development

I will focus mainly on what I would call introduction to the role of analyses and research in tourism product development - and not only on mere research and analyses connected with tourism traffic.

Let's begin with introduction to research. I will not talk about obvious things such as - science may be helpful in designing a good business plan, that science may tell us how to make a good road, what material should we use if we want to build a hotel.

I would rather focus on these issues which may be interesting for both central authorities and those who deal with development of favourable environment for tourism development, rather than the mere tourism and tourism product development. This way I should begin with explanation of how science may help with the following issues: planning, strategies, development planning, development of programmes for tourism development. The World Tourism Organisation recommends that three periods should be mentioned with regard to tourism development planning and programming, on both national and local level:

- with regard to **long-term policy** in tourism we have to think of some 20 years. And here we get to the first issue we deal with - what is necessary during such a long period of time and where exactly science can help us? It is in this field science can help us most. First of all, everyone should have a vision, see how a phenomenon, here tourism product, tourism traffic, tourism infrastructure, or our city after some 15-20 years should look like. This vision is crucial if we want to plan an action strategy.
- **during the second stage, with regard to action strategy**, even if we do not shape it into a complete programme, all forecasts on tourism development will be needed.
- **during the third stage, we switch to detailed planning projects**, and here the science may help us with very detailed cases.

Let's begin with those fields of science which allow us to create visions, and then strategies. Right now we should talk about a group of sciences, including social studies, which define how a society and its needs will look like in 15-20 years. Second standing is taken by environmental protection and territorial development, I want to note that by environmental protection we understand not only protection of nature but the entire environment, the habitat

of man, including his cultural environment. The third long-term element is manpower development, an often forgotten factor - but if we want to develop tourism we have to plan it earlier to get some people to work in it.

Another issue, which is important for research is the question of organisation and marketing, which has to be taken into account regardless of the fact whether we plan a project on an "amusement park" or "development of Częstochowa as a pilgrimage centre".

And finally we get to the issue of legal regulations. By regulations I also understand the tax system stimulating tourism development in a municipality, region - that is actual decisions regarding exemptions or reductions.

This group of issues may be matched with four principal groups of research themes connected with tourism planning. The first group is a field of science called development planning, the second one is market research, the third one - economy and economic research, the fourth one - planning infrastructure development. Now let us pass to more detailed problems. Let us try to treat this issue in a simplified way - science ought to answer two questions - the two essential questions asked while talking of development of tourism economy and tourism industry. The first question is: what should we do to let them know we exist? The second question is how to make them visit us? We can always say we are interested in finding one customer who will spend so many dollars during his trip to a given destination that it will be enough for its inhabitants to lead happy lives. It is the ultimate tourism model for tourist destination regions. Why capture millions of tourists if it is enough to capture one who will spend the same amount as millions. Naturally, it is a caricatural and extreme example but we should aim at it. Such fundamental question can be answered in one way - a visitor will spend one billion in my municipality if he has something to spend it on. If he has something to spend his money on he will surely come. It is the easiest answer to the question how to improve tourism development in a destination, municipality, or region.

Let us begin with the factor deciding on arrivals to a given country, municipality, or region. It is generally believed that there are four basic elements. The first one is easy access. For many years central coast in Poland was not frequented by tourists - it was difficult to get there by train. Now the region is easily accessible not because new connections have been released but because the structure of means of transportation has been changed - more and more Poles travel by car.

Another element is access to information in one's place of residence - information on location of a given destination and easy connections. For instance, we have all heard about Paczków in the school. Still, few of us know where it is. How to get there? What places of interest has

it got? Availability of information in one's place of residence, preferably in a travel office near one's house is another essential element of accessibility.

Next is stability of conditions. Various research outputs point out that people like to travel to destinations where they had spent a good time. Tourists need a certain stability of conditions, awareness that "old places" will be as good as they used to be.

And the last, perhaps focal issue - i.e. possibilities of spending money in an attractive way. It is the principal factor, responsible for losses of several Polish regions and the whole of Poland. Visitors do not see much they could spend their money on. It is a matter of developing conditions for spending money, not their actual spending. People, and especially holiday-makers need offers - a full package, even though they cannot afford it at a given moment.

Scientific institutions dealing with tourism problems carry out two principal types of research and analyses. One trend is market analyses, another is analyses of tourism traffic in the whole country, municipalities, region.

We are often asked why so much money is being spent on sophisticated research which will tell us how many per cent come by car, how many by coach, how many through tourist agencies. The main objective of market analyses is to attract investors interested in investing their money in tourism development. If we take a look at hotel investments released in Poland, and on the second hand, glance at hotel occupancy rate, we may see a two year gap. Occupancy rate is on the increase, in two years new concepts for hotel investments in Poland begin popping up.

And while talking of market analyses we should talk about foreign, domestic and local market analyses. I will quote a couple of cases and present the issue of foreign markets in brief. Theoreticians believe that each one of these analyses should contain the following factors:

- information on where our competition is, who is our competition, and how does our competition act,
- which markets are the key markets due to accessibility,
- new trends in human behaviour, arrivals etc.
- fashion which has a big impact on tourism,
- what are receipts from incoming tourism?

Then we pass on to the volume of domestic tourism traffic, and traffic in particular destinations. And here we apply various analyses - from research in voivodships, to research

on distribution of tourists (major areas, places where they get away after completing their traditional programme).

Expenditures of foreign tourists are yet another important issue. At the domestic scale we may talk about expenditures of travellers in a given year, average expenditures of travellers from a given country. In the case of regional analyses or analyses carried out in a municipality more important is information about daily expenditures of travellers in a given destination. It may turn out that expenditures of one-day trippers from the Czech Republic exceed those incurred by German tourists.

And while talking about domestic tourism traffic - such comparative analyses begin with the question about the percentage of inhabitants of a given country, city, region leaving their usual place of residence for at least five days. For regions situated in the vicinity of big cities more important is information on short breaks, not longer than four days. Distribution of traffic registered in accommodation establishments gave shape to the map of things to be promoted in Poland.

It seems that more detailed analyses result in a choice of a given factor, which plays the leading role in taking investment decisions or decisions on promotion of given regions. Regardless to how long and complicated way I will choose, it turns out that this factor is relatively clear and easily defined. Sometimes logical thinking leads to similar achievements as long-term scientific research. I mentioned it because one of the presented maps has been prepared on the basis of discussions, and the second one on the basis of expensive research.

**Roman Olgierd Dziekoński**

**Vice-Mayor of Warsaw**

## **The Role of Local Authority in Tourism Product Development, On the Case of Warsaw**

It is easy to notice that Warsaw captures more tourism traffic than any other tourist destination in Poland - and much more than destinations in the country. One may ask a very basic question - why do people like cities? It seems that it is because cities have what we call identity. Identity of a city may have several categories. We may talk of a historical identity, often connected with historical experience, specific history of a given city. Warsaw is a perfect case - but Cracow is a good example, too. Cracow witnessed numerous historical events connected with, what we may call, the integral history, the integral national culture. At the same time the city becomes an essential element, ingredient of the national culture. If the national culture is interesting for visitors then the city is in a way an image, a trademark of the national culture.

In the case of Warsaw very characteristic and meaningful are contemporary historical events. What had been a tragedy of the city, e.g. the ghetto uprising, the Warsaw uprising, destruction of the city, now became a purpose of trips and visits of Polish and international visitors. Hence, all places and souvenirs connected with these events create historical identity of the city. Naturally, in the case of Warsaw its historical identity is much deeper, it is connected with the Royal Castle, with the Royal Route, with Belvedere. Therefore, phenomena epitomed by material objects create the historical identity of a city.

Another essential value is an image identity of a city. Every city has its character. What is it? It is something made up by good pavements, nice street lamps, post limiting vehicle traffic, benches, neon lights, lighting of street facades. It is supplemented with preservation of historical resources, conservation of certain urban areas or their reconstruction. It is topped up with factors deciding on the value of a city: parks, open space, forests.

Subsequent value connected with identity of a city are cultural phenomena, which already exist or may appear. Warsaw hosts numerous cultural events - from cyclic internationally acclaimed events such as the Chopin Festival, Warsaw's Autumn, Jazz Jamboree, to special events such as the Mozart Year, honoured last year by the Warsaw Chamber Opera.

Another element of identity of a city are all those specific functions or types of activities in a city, which make it distinctive from others. Oxford and Cambridge in England, seats of two excellent universities, are a perfect example. They are not only clusters of interesting

buildings, but also a place where tourists come because something is going on and creates the characteristic image of the city.

At present such characteristic phenomena for Warsaw may be markets around the Stadium of X Anniversary or in front of the Palace of Culture, rather than the Warsaw University or similar places and establishments.

In what way local authority may influence factors which create tourism product in the city, and thus influence all categories of the city's identity. What instruments an urban authority may have at its disposal? These are:

- plans for territorial development,
- landscape plans, projects connected with architectural values
- development programmes
- information and coordination activities
- investments
- direct support of certain phenomena by the city budget, that is their subvention.

Territorial development plans are one of the essential tools of urban policy. While drawing up a plan one should acknowledge the spatial context of a tourism programme. It is not only the issue of protection or conservation of protected green areas. It is also important to consider which areas and in what sequence, influence what we may call the architectural landscape of a city ( these are for instance, the Royal Route or Old Town, as well as fragments of Żoliborz and Mokotów in Warsaw).

Technical infrastructure is another important component of a territorial development plan, bearing direct influence on functioning of tourism in a city. It is not only a matter of road arrangement but it also regards the system of public transportation. Type of public transport, types of tickets, types of urban means of transport - all those elements have a positive or negative impact on functioning of a city as an area with a distinct identity.

As far as territorial development plans are concerned, right now, while updating a general plan, we are trying to use recommendations connected with organisation of Warsaw 2012 Olympic Games. We also want to have a feasibility study on improvement of city's tourist attractiveness.

Right now we are carrying out several projects concerning important sites in Warsaw, such as converting the area of Cytadela and installing there the Polish Army Museum, and possibly some tourist establishments, form a Polish Army Avenue. Another project is devoted to converting the area of Powiśle into a Warsaw's "Quartier Latin" - the first step will be laying

foundations of the Warsaw University Library. It will not be a library in the strict sense of the word, but a place hosting important cultural events. Such big establishments, combined with projects at smaller scale, such as presently considered new recommendations regarding furnishing of the streets (for the beginning it will be Nowy Świat, Krakowskie Przedmieście, and a fragment of Marszałkowska street) will help to develop a favourable urban environment.

I would like to draw your attention to an essential element of these activities. They have to be teamed up with a conscious architectural policy implying a continuous architectural supervision - this way we will avoid faceless architecture.

It seems that more attention should be paid to contemporary architecture - we have interesting achievements in this field.

A series on books on monuments of contemporary architecture is being prepared - and the category includes buildings erected from the turn of 19th century onwards. We want all architectural establishments which seem to be landmarks of the city, to be described by little booklets. Another prepared publication is a catalogue of monuments in the city. It is yet another important element of architectural landscape.

And while talking about development programmes it is important to present a vision or a concept of urban development. It cannot be a distant concept because it will cease to be interesting for all those people who perceive the city as the aim of their activities. It is a question of identification of fairs, which will be held in the city, public buildings to be erected, how public services will function in the city in the nearest future, in what direction they will be developing.

As far as information and coordination activities are concerned I have to say that Warsaw has been poorly prepared. As a city government we have already released some organisational projects, which should produce some desirable results, thanks to cooperation with the State Sport and Tourism Administration and the Polish Agency for Tourism Development. A tender for organisation of an Tourist Information Centre in Warsaw has been launched. It will be a joint project combined with the Information Centre. A system of tourism information must include information on cultural activities. Such an information-promotional unit will allow for instance, for coordination of exhibitions, concerts, conferences.

This part of coordination of activities also includes coordination of cultural activities, various fairs, activities of various centres, for instance the Centre of Contemporary Art.

On the other hand it is important to coordinate activities connected with protection of open space, parks and forests in Warsaw. A decision on taking over the protection of all forests

encircled by administrative boundaries of the city has been already taken. It is connected with huge organisational problems and important issues of financial liability but it seems that only this way we can turn Warsaw's forests into a component of the tourism product.

And finally, the question of direct investments. It concerns construction of hotel establishments in cooperation with interested partners. It is also investing in infrastructure and indirect investing, i.e. investing in urban development, streets, roads, pavements, lamps, lamp posts - all factors deciding on the city's image and standard of living.

And the last, very controversial issue. Regarding subventioning or financial back up for cultural, scientific, and sport events. It seems that they create a variety which in turn makes a city interesting and colorful.

Summing up all presented issues I would like to point out to the following ones:

- first of all, close cooperation of local authorities with state organisations, with companies, and other authorities, is very important,
- secondly, it is important to develop suitable organisational structures for respective activities,
- promotion of tourism product should be finally appreciated.

## Voices in the Discussion

**Grzegorz Russak**

**Director of Polonia House in Pultusk**

I listened to the speeches with a great interest, although I have to admit that they have few things in common with the model of tourism, which in my opinion should dominate in our country. I agree with point of view of the director of Institute of Tourism that common sense should be always the deciding factor. I know that my statement will be controversial but European features of tourism and this model, which we are now trying to adopt, is not favourable for us. Tourist attractiveness of our country is on the decrease as we do not sell Poland's strongest points. We always admire the foreign and we do not appreciate tourist attractiveness of what we have got. For instance, from Poland we export the best raw food products: unique species of fish, crawfish, and others.

Similarly, there is no tourist offer which would feature Polish landscape, a Polish river - it would be as interesting for the Japanese as the Mekong river or jungle is for a Pole. We do not sell it, we do not sell the essence of Poland as such, on the contrary, we are heading in the wrong direction. For an international tourist Warsaw will not appear attractive if all he finds here are hamburgers, spaghetti, Italian wine festival or other products we may find elsewhere. Our top hotels are just the same as hotels in other cities and countries.

I am saying it as an experienced man, because I rely on common sense while managing my own establishment. I sell the essence of Poland, I sell exclusive events, not to be found elsewhere. For instance, Poland is the leading producer of game, but the business is not organised. If you are not an expert in this field you won't be able to get to the real thing. Another misunderstanding is export of *powan* and European whitefish, which should be served in our restaurants.

We said a lot about tourism policy. But these are theories. There are no practical aspects to this issue. If we say that Polish tourism needs genuine information I do agree with it, but this information has to be combined with a national reservation system. Information, which is available in Polish tourism - and I am talking about catering, hotel business, tourist attractions - is often exaggerated as we have no grading system.

Another issue is application of certain preferences. It seems that Polish cuisine may be one of our top attractions. Where can I find it - I may ask you? Nobody is interested in its

promotion. I believe that people who offer Polish cuisine, rely on Polish products should benefit from tax reliefs.

Another issue regards a broader presentation of offers put forward by smaller establishments, especially on foreign markets. These establishments cannot cover huge expenditures on advertising on their own, but if we had for instance, twenty small establishments, each one of them would be happy to participate in costs of advertising. But we do not have such a system.

Many countries overcame the recession thanks to tourism. Poland also has got the chance. I asked myself a question, maybe an academic one - what would I do if I was, for example, a Minister of Tourism of the EC countries - would I watch out for Poland or not? The answer is - yes, I surely would. What would I do to get rid of this competition, and there are markets to be won. I would simply make Poland European. I would give them, almost for free, pizza restaurants, hamburgers, Italian wine festivals. This way a Japanese tourist would never go to Poland, what for?

We erase Poland from tourist maps saying that we are a polluted country, that our environment is in a disastrous state. I am asking you - can you find similar forests in Europe? The answer is Yugoslavia but it is not a perfect place for a walk right now. Then, why it is not featured in the tourist offer? Why we never promote Poland by showing our assets? Let's take organisation, hygiene, and standards from the West, but the rest should be ours. We will be a lost country if we do not put our national identity in the tourist offer.

**Jerzy Łopuszyński**

**Economic Committee of Warsaw Council**

I am very glad that people from Mazowsze could gather here. I think that we have a lot to say and plan. I understand that none of the voivodships, including Warsaw, will manage on their own, and together we are able to develop a cooperation plan which will allow us to enhance specific features of Mazowsze. I would like to draw your attention to the following problem - foreign tourists leave Poland less satisfied than we wished they were, and we can do better than the programme we have. Therefore, we should really give it a thought. And I would like to tackle another issue - we cannot prepare separate programmes for international, incoming, or domestic tourism. Our domestic tourism is in a bad condition, a very bad condition. But I do not want to talk about it. Only routes visited by Polish tourists will be attractive for incoming tourists.

I dreamed of, and many times crossed routes cutting across Kampinoska Forests. How many possibilities lay untapped there, especially if we team them up with visits to destinations located outside the Warsaw voivodship.

And a very important issue - not a long time ago we had 14 thousand guides in Poland. Where are they - I might ask. None of the speeches was preoccupied with them. The top programme, best attractions en route, great work of many people, will not work out if we have no good guides. Only 100 from 1200 Warsaw guides are still working. Others were simply lost. I do not want to go into causes but I want to stress that there is no good tourism and no good tourism product without guides, no possibilities to enhance our specialities, our specific features. For that we need a man who will tell stories, create the atmosphere, and make shortages less visible. Tourists will be left with great moments and a strong desire to come back here once again, maybe with friends. It should become our goal.

**Stefan Kwiatkowski**

**Director of OSiR in Węgrów (Siedlce voivodship)**

A problem which is eating me is connected with camping site n 246I, the only camping in the voivodship, situated in the Sport and Recreation Centre. In a strange way the site was to be located in Węgrów, but due to administrative neglect it is situated in the municipality of Liw. In one year the tax went up seven times. I would like to stress that an aggressive tax policy may lead the hardly sustained tourist infrastructure to its fall. The tax rate was fixed according to the Land and Immovable Property Expropriation Act dated 29 April, 1985. The Act is not precise to the extend that it allows for free pricing of one square metre, which is then subject to the tax.

It seems that the State Sport and Tourism Administration should introduce some amendments. If we have to respect the law let it be sensible. If the law allows for free interpretations, it is dangerous.

I know that the Polish Camping and Caravanning Federation was to introduce regulations, which would relieve from excessive tax burden such specific tourist facilities like camping sites - open only a couple of months each year.

I am happy that all of us could meet on this conference. During the past years all ties between tourist activists have been broken. I remember asking the voivode to make an attempt at coordination. As a council member I know that authorities are barely aware of the importance of tourism. Nobody is aware that it stimulates economic growth.

**Marek Paszucha**  
**President of SSTA**

During the past two and a half years , in the State Sport and Tourism Administration, in which there was no tourism, we managed to build a hard working team, which drew up a draft statute on promotion of tourism and tourism services. They also worked out a policy, which I presented this morning, and delivers training courses, financed from budgetary resources and PHARE funds. Problems we are dealing with today are aimed at putting together a group of 1000 people, who understand the economic aspect of tourism and will apply it in their environments.

Most of people I have been talking with during the past two and a half years think in a similar way. Our first thoughts are identical - we have magnificent forests, water, we have it all - but nobody comes.

Foreign travel agencies tell us - people are interested in Poland - what have you got to offer? There are no channels of distribution, we are only trying to develop them.

We are drawing up a tourism product development plan, as a summary of activities carried out by municipalities, towns, regions, unions of municipalities and voivodships. We know what natural and cultural values our regions have, but values alone are not a product. Few municipal councils in Poland treat visitors as people who may improve their standard of living. But some parts of Poland have already realized it, mainly municipalities situated along our western, southern, and eastern border. Central Poland is different. It is not aware of it. Municipal councils, being under pressure of communal needs, payment demands and others, do not look out to the future.

I would like to draw your attention to the fact that we are not telling you what to do, we give no instruction. We simply see great possibilities, great expectations and the fact that too many people, including the people of science, concentrate on documentation of how bad it is.

**Giacomo Micelli**  
**Tourism Assessor of the Region of Lacio (Italy)**

Italian tourism policy undergoes the period of deep changes. Its specific feature will be a greater initiative of public institutions. As a result of a national referendum, organised last spring, our Tourism Ministry was liquidated. It was unable to function effectively and to pursue a regional tourism policy. The referendum clearly proved that regions should exclusively handle their tourism policy, whereas coordination and their representation on the

international level will be dealt with by a department attached to the Council of Ministers. Such far-fetched and deep changes lead to a greater responsibility of public tourism institutions in particular regions. In the economic structure of Rome and the region of Lacio tourism plays the leading role, both regarding revenue, employment prospects, and new investments.

Main private structures watched by tourism authorities, are hotels and travel agencies. The region of Lacio features the total number of 1920 accommodation establishments, offering 113414 places. In Rome and the province alone, there are 110 hotels with 79855 places. The region of Lacio has 705 agencies, in which 606 are based in Rome or its environs.

Public tourism organisation of the Lacio region consists of the central part, represented by Regional Tourism Assessorship, departments based in five provinces of the region, and 19 tourist agencies with urban and inter-urban competencies, based in major tourist destinations.

Generally, public tourist institutions promote tourist values and attractions in Italy and abroad, whereas private structure deal only with provision of commercial services on the basis of free competition.

Activities of public organisations focus on supporting initiatives of private enterprises, release of promotion and advertising programmes, participation in tourist fairs in Italy and abroad, big cultural, artistic, and sport tourism-related events.

The main goal of the policy for regional animation is to stress the impact of not only Rome but the whole region of Lacio. All initiated activities should lead to an increased number of tourists, by provision of better quality services.

It is important not only to win a tourist but to secure such conditions for his stay that he will be able to rest, explore our monuments of culture and art. The market has become more competitive and discriminating, therefore, offers should become more attractive - what lays with both public tourism institutions and private enterprises.

The region of Lacio carries out reorganisation of the public tourism structures. They will be modernised, strengthened with strong managerial elements, and public activities will be teamed up with purely economic activities of tourist enterprises.

The new model implies establishment of a regional agency for tourism promotion. Its long-term strategy has been approved by regional authorities. It will become an effective component of the regional tourism policy.

In the nearest future we plan to establish closely cooperating tourism promotion enterprises, which will operate in the five provinces of the Lacio region. Their goal will be animation and close coordination of all tourist initiatives with local authorities of provinces and organisations associating private entrepreneurs.

We will establish a network of information centres located in major tourist destinations. They will provide tourists with all information and provide assistance and such welcome which will make their stay more enjoyable and interesting.

## **Reports of Working Groups**

### **Group 1 - The Function of Warsaw as the State Capital in Tourism Product Development**

**Chairman: Zenon Dagieli, Director of Department of Sport, Tourism and Education of the Office of the Capital City of Warsaw.**

Discussion focused on two theme groups:

- factors deciding on arrivals of tourists to Warsaw,
- activities aimed at development of the city's tourism product.

**Recommendations regarding the following issues have been put forward:**

1. Determine a long-term tourism policy on the urban level, aimed at utilisation of tourism potential resulting from the function of the city as the nation's capital.
2. Development of two groups of tourist products addressed to two market segments. The first one is the group of business trips, the so-called business tourism, the second focused on trips for cognitive purposes. Both regard domestic and incoming tourism.  
Recommendation is addressed to the City Council of the Capital City of Warsaw, State Sport and Tourism Administration, and economic authorities.

#### **The question of Legal Regulations**

3. Acceleration of legislative work on the Tourism Law.  
Addressed to the State Sport and Tourism Administration and the Parliament of the Polish Republic.
4. Amendments to legal regulations regulating land management in Warsaw.  
Addressed to Parliament of the Polish Republic, Warsaw Council, and councils of boroughs-municipalities.

#### **Organisational Issues**

5. Establishment of the Warsaw Chamber of Tourism as an economic authority of the tourism sector in Warsaw.
6. Establishment of a forum for a continuous cooperation of companies, institutions, associations and other organisations interested in tourism development in Warsaw.  
Addressed to State Sport and Tourism Administration.

#### **Identification of components of tourism product in Warsaw**

7. Making an inventory of ingredients of tourism product of the city, that is accommodation infrastructure, catering, transport, supporting infrastructure, tourist values.

Recommendation addressed to the Warsaw Council, to be carried out by the newly-founded Tourism Information and Promotion Centre.

### **Quality of services**

8. Activities for improvement of quality of services provided to tourists and residents.  
Addressed to trade economic authorities.
9. Professional development for employees of tourism trade, preparation of a training and professional development programme in cooperation with foreign partners.  
Addressed to the State Sport and Tourism Administration and City Council.
10. Developing awareness of benefits brought by incoming tourism traffic to Warsaw among residents of the capital.  
Activities for extension and promotion of tourist offer
11. Appointment of an inter-departmental team, including municipal authorities, which would deal with teaming up the cultural offer with Warsaw's tourism product.  
Addressed to the State Sport and Tourism Administration, Ministry of Art and Culture, Warsaw Council, Voivodship Office.
12. Establishment of Tourism Information and Promotion Centre in Warsaw.
13. Development of a calendar of cultural, entertainment, sport and other events, with stress on state anniversaries.

### **Improvement of infrastructure**

14. Integration of activities aimed at improvement of services provided at the Warsaw Airport.  
Addressed to the Airport Management.
15. Improvement of Warsaw transport by introduction of one-day, a several days, or weekly tourist tickets or cards, information on where tickets may be purchased, selling them all over the town.
16. Marking public transport stops with tourist signs. As we know the city has got new stops and co-manages them. Stops should feature Warsaw transport plans and information connected with urban tourism.
17. Selection of sites for short stop-overs of tourist coaches in particularly interesting regions. For instance, it may be St. Anne's church, Łazienki or Belvedere. Addressed to Board of Urban Roads or Department of Transportation of the Voivodship Office.

### **Security of tourists**

18. Improvement of security of visitors, especially in places visited by tourists.  
Recommendation addressed to the Police, Municipal Guards.
19. The problem connected with taxis and the so-called taxi mafia. The problem has to be solved by the Parliament, as it was the case with drugs and drug addicts, especially in places visited by tourists.

### **Order and the state of sanitary facilities in Warsaw**

20. Improvement of the actual state, with the stress of public toilets.

## **Group 2 - Cultural Heritage and Tourism Product Development**

**Chairman: Zygmunt Michalak, the vice-voivode of Skierniewice**

1. Identification of activities aimed at tourism development plan in the Skierniewice voivodship, which is to be performed by the existing Skierniewice Foundation for Regional Development, in cooperation with local governments, special and economic state administration.

This recommendation is addressed to the Agency for Regional Development. We would see the voivode of Skierniewice as the programme coordinator.

2. Promotion of pedestrian tourism by publication of books on tourist routes in Skierniewice voivodship, with respect to demand and interests of teenagers.

Addressed to the State Sport and Tourism Administration, Voivodship Office, School Superintendent's Office and local governments.

3. Identification of tourism product for the Skierniewice voivodship. Draw up an offer for domestic and international tourists on the basis of the existing infrastructure and tourist values of the voivodship.

Addressed to local authorities, providers. We see the Voivodship Office and special administration as the project coordinator.

4. Consideration of attributing Żelazowa Wola with the status of the monument of cultural heritage. It should be combined with treating it as a top priority in the field of investment possibilities, using credit preferences for this cause etc. by central and local authorities.

Addressed to the State Sport and Tourism Administration, Voivodship Office, local authorities, although it seems that we will have to reach much higher.

5. Define division of competencies in tourism between local and state administration.

Addressed to the State Sport and Tourism Administration.

## **Group 3 - Holiday and Recreational Values of Destinations in the Mazowsze Region.**

**Chairmen:** Stanisław Podmosko, the voivode of Ostrołęka, and Wiesław Protasiewicz, the voivode of Siedlce.

Recommendations resulting from the discussion are addressed to the SSTA, Parliament, and local authorities.

1. Initiate efforts for an urgent passage of Tourism Promotion and Provision of Services Act by the Parliament. Activities of the department should focus on acceleration of the legislative process.
2. Consider development needs of tourism industry and tourism - take them into account while amending and drafting legal regulations, especially the Territorial Authority Act.
3. Carry out activities aimed at cutting down tax burdens from lease of forest areas used for tourist purposes. It is an important problem as far as holiday values of a destination are concerned as many holiday destinations located both in Brok and other destinations of Mazowsze are situated within state forests. It provokes a conflict about fees and taxes between local authorities and State Forests.
4. Increase budgetary means for tourism and recreation.
5. Appointment of an Inter-Departmental Tourism and Recreation Council.
6. Organisation of training courses for representatives of local governments, financed from the PHARE Fund, in order to develop a model of tourism organisation in the municipality.
7. Initiation of the joint activities:
  - development of a joint annual calendar of cultural, sport and tourist events,
  - development of joint information on tourist services, tourist routes etc.,
  - establishment of a joint data base on agrotourism offers,
  - initiation of activities aimed at relieving farmers from income tax from agrotourism services. It is a substantial obstacle preventing farmers from this activity.
8. Establishment of systems for local tourism information.

The group has recognised development of tourism industry as an important element of economic animation in the region and an efficient tool in fighting unemployment.

## **Group 4 - Problems of Adaptation of Company-owned Base to New Economic Conditions.**

**Chairman: Jan Pech, Deputy Director of Civil Studies Department of Warsaw University in Plock**

Our recommendations and discussion were based on a paper on implementation of tourism programme for Europe, commissioned by PHARE and EC and written by the Irish Ministry of Industry and Commerce for the Plock voivodship. The programme has already been partially implemented by PHARE.

Changing economic conditioning of state enterprises creates a threat to the regular utilisation of holiday and company-owned base. Financial problems of the majority of Polish families put holidays behind in the structure of household budgets. Quite recently we could observe a rapid growth in demand for weekend breaks in the vicinity of one's place of residence. Unfortunately, many holiday centres continue to stick to the hermetic system permitting only company employees and their families to use its establishments. According to surveys carried out by the Civil Studies Department in Plock, at present over 50% of all companies, which own holiday centres in our voivodship are initially interested in opening their establishments to the public. It requires development of a suitable system of information on available places, sale conditions, procedure facilitation etc. The existing Holiday Reserves Bank failed to satisfy the demand. All information provided should be clear and easy to understand for all who wish to stay in a given centre.

We should agree on a principle that places in an establishment may be occupied by tourists willing to stay at least 3 nights. It is a result of economic conditions connected with maintenance, laundry, which is very expensive, etc.

Regional radio stations, local television, and the press may play an important role in dissemination of such information. In this case it is important to maintain the flow of information between particular editorial offices in neighbouring voivodships, and national and international information in the case of high standard establishments. Due to cost-saving it seems reasonable to establish an office, or convert or use existing ones, which would represent those centres in public. I am thinking about fairs, market days, contacts with domestic and international clients.

A separate issue we should tackle is standard of those centres. Unfortunately, their leasing results in enormous losses. Most establishments are occupied beyond their limits, with no modernisation improvements made - profit is all that matters. Owners of infrastructure have to realize that high standard establishments will draw tourists, especially foreign, and thus will

yield financial profits. Specific location of our voivodships creates possibilities for attracting tourists from Warsaw or Łódź, who having concluded their professional affairs would take two or three days off and rest. A satisfactory programme would have to compliment accommodation and catering. Perhaps it could be horse-riding, driving lessons, horse rides, sledge cavalcades, bon fires, hunting, water sports. Such an approach towards tourists requires individualisation of goals, and thus cannot be implemented by one establishment alone. It proves the need for establishment of a coordinating organisation, which would secure a regular flow of information, and agreements with all units implementing the programme, e.g. the Polish Hunter's Association, the Polish Angling Association, stud farms, sailing associations, management of sightseeing parks.

### **Recommendations**

1. There is a need for establishment of a regional tourism organisation, which would handle joint promotion of tourism product and commercial information in tourism.
2. In order to secure a satisfactory standard of tourism services it is necessary to organise a specialist training. Assistance of the State Sport and Tourism Administration is definitely needed.
3. Tourist establishments of the former State Farms, being at the disposal of the Agency for Agricultural Property of the State Treasury, are threatened by taking over their financial funds and establishments by creditors. It has been said that bailiffs may come any time now as the Agency is so indebted. Sometimes establishments which still remain profitable are the first ones to be taken over. Therefore, change of the ownership form is necessary. It could be done, for instance, by communalization or establishment of one-man State Treasury enterprise.
4. Company-owned establishments should be basically not for lease, due to their poor maintenance - they should be communalized or privatised. The act on competencies of municipalities and territorial governments should include a clause about tourism, providing preferences for this type of activity.
5. Units carrying out tourist activities should be subject to tax reliefs. It regards for example reliefs from land tax for seasonal tourist establishments.
6. We should plan a preferential credit line for implementation of tourism projects.
7. The state budget should help in the promotion of regional tourism product.
8. There is a need for verification and grading of tourist establishments.
9. There is a need for periodical regional and possibly national meetings which would allow for exchange of experience in tourism, in order for those who deal with tourism and want to think in a modern way to see a well-managed establishment, a well-run tourist agency etc.
10. There is an urgent need for development of general conditions for proper functioning of recreation centres by giving access for low-interest credits for investments, modernisation, reconstruction, and change of tax policy regarding seasonal establishments.

11. We recommend elimination or respective cut down of dividend from these centres.
12. We should aim at acceleration of work on the Promotion and Provision of Services Act, what would allow for a rapid gradation of infrastructure according to European standards.

## **Group 5 - The Role of Local Authority in Development of Local Tourism Market.**

**Chairman: Jerzy Pelka, Director of Social Studies Department of the Warsaw University in Ciechanów.**

We tackled several topics during our discussion. Most of us pointed to positive cases of cooperation of local authorities. Several municipalities have drafted territorial development plans with regard to tourism development in a given region. Recommendations focused on obstacles and constraints preventing or making development of local tourism market difficult.

### **Recommendations:**

1. We should create favourable legal regulations concerning financing of municipalities. The act on finances of municipalities is in the Parliament. Municipalities get restricted subventions if they grant tax exemptions, and they do it when they finance their activities, for instance in tourism.
2. Create more favourable economic conditions for individual farmers, who begin to provide tourism services. We see a need for amendment of the act on social welfare for persons conducting economic activity and their families, in such a way that the insurance should not include farmers who additionally provide tourism services.
3. Development of tourism market should imply preservation of our national identity and specific features of particular regions. We have been shown common cases of exportation of farming facilities and equipment to the West, such as hand-made boats from Mazowsze, fishing nets, and horse carriages, which may be an additional tourist attraction of the region.
4. There is a need for creation of an efficient flow of information between state, central and voivodship administration and local authorities, both upwards and downwards. Information will provide data on access to credits, principles of using money from the PHARE Fund. There is a need for development of a system for cooperation of these organisations, that is central, voivodship and local administration.
5. We should set up a data base on tourism product of particular destinations and regions.
6. Introduce standardisation and recommendations of tourism services. Standards and principles should be fixed by the state administration. Supervision over the quality of provided services should lay with local authorities.

7. We should consider the possibility of adapting buildings of close-down schools, taken over by local authorities, for tourism purposes. It may happen when education will come to municipalities - right now it would be very difficult.
8. There is a need for establishment of a domestic tourism information network, with complex solutions regarding principles of its financing, with contribution of local budgets. It would be based on modern information techniques and employ qualified personnel.
9. Change unfavourable regulation for local authorities, which provides that forest sites of over 1000 m<sup>2</sup>, situated in protected areas will be subordinated to the district board of State Forests. Municipalities have been deprived of the power to manage this land, what makes any tourist activity very difficult.
10. Consider the possibility of introduction of tax preferences for ecological products and wholefood. It is very important in our region.
11. Draft a training programme for professionals, including courses for employees of state and local administration, focused on developing awareness in local communities. Tourism should be also taught to school children.
12. Create tools which would force farmers to respect environmental issues, e.g. location of dumping grounds.
13. Create channels of distribution for tourist services, especially for rural tourism.
14. We should focus on domestic tourists. Without them we will not be able to develop tourist services. We should consider introduction of a holiday benefit, which would produce increased demand for tourist services.
15. We should create conditions under which territorial authorities will have influence on investments in tourism infrastructure - roads, telecommunication, power network. As we know it from our experience, activities of units managing these infrastructure elements do not match local development needs.
16. We should analyze phenomena occurring in municipalities which develop tourism, with general indication of incomes and budgetary expenditures, the impact of tourism on decreased unemployment, development trends of tourism services, economic development constraints in municipalities, economic environment in particular municipalities and in the region. Tourism development plans should be based on results of such research.
17. Property communalization should take place with regard to the economic calculus.

Lucjan Niemczewski

Vice-president of SSTA

## Summing Up the Conference

The Conference has proven that Mazowsze - perceived as an area embracing seven voivodships - is an integral region, that tourist issues trespass administrative boundaries, and the region has specific values, certain functions and objectives.

You had a chance to listen to speeches, also international, which illustrated relations between big urban agglomerations and their neighbouring areas. Whether the region outside Warsaw is rich in outstanding values or not it is up to you to decide. I have to say that both documents and your opinions show that the main success of our conference is a second time exploration of beauty of Mazowsze, admired by many poets. I scanned several poems about Mazowsze. Unfortunately, they do not match out present day and future - they have always been preoccupied with stormy and bloody history of this part of land. I have to admit that we have lost one item during our conference. This land witnessed the biggest success of the Polish Army. Here the Miracle on the Vistula had happened, today its anniversary is celebrated by the Polish Army Day, here the Polish army had its biggest success in 1939.

We lost this historical element, but it is worth noting in the output of our conference. From the point of view of educational function of tourism we should remember about the battle of Bzura, fights in Kampinos, because while bringing young people to the capital we should always show them what glorious victories we used to won on this land.

Another issue, which results from conference papers and teams work, is a poor promotion of this region. Publications, which we all have been given, are different from those presented during a regular promotion of particular regions in Poland. As it turned out from our discussions, our top priority should be preparation of joint collaterals about Mazowsze - which would show its beauty, its historical traditions, its opportunities for domestic tourists, residents of Warsaw, and for international guests who while visiting Warsaw would like to explore this land a bit more.

We have nothing against financial back up for the regional promotion from the state budget and TOURIN I programme, a tourism product development programme. Also TOURIN 2, dealing with issues of agrotourism and horse-riding, will provide financial means for this. I understand that voivodships have modest budgets, therefore we feel obliged to support a genuine programme for promotion of this Polish region. How you are going to make it - it

is not a problem of our department. We offer you the potential of the Polish Agency for Tourism Promotion and other structures.

I have to admit that although I would not like to compare conferences from particular regions, in Cracow we were given a calendar of events for the whole of 1994. And again I can declare that if in any organisation you will be able to publish a calendar of cultural events on its own - it can always receive financial back up. I interpret the term "cultural offer" in a very broad way - because a Corpus Christi procession in Łowicz is not only a religious celebration but also an interesting cultural event which should also be featured in such a calendar. There is a number of such events.

Another issue stressed in recommendations of groups is the role of territorial governments, which thanks to tourism may secure the future in their municipalities.

Regrettably, I have to admit that our conference did not show the function of the capital as a city capturing a great number of people - because it is the state capital and the cultural centre, and a historical city. We will talk with city's authorities once again because we want to have a follow up meeting and focus on Warsaw and issues of this big city. For the office which is responsible for the whole of tourism it is important to come back to this issue once again, as it is related to the great incoming tourism to Poland, to recreational zone for the biggest Polish agglomeration.

All issues concerning development of infrastructure and making open space more attractive are very complicated. We hope for big contributions of the TOURIN 2 programme, the follow up programme of substantial aid for development of tourism industry in Poland, focused on development issues of tourism in rural environment, and therefore concerning all presented voivodships. It features a monographic theme concerning horse-riding, all forms of using the horse as a tourist attraction. Next year we will introduce this topic to Mazowsze, because we have to begin with something, and it is always easy to begin with a region we know, with a region with common problems, and which is relatively close. Besides, we have a potential customer here.

The biggest tactical mistake to be made is animation of movement, human activities, engagement of intellectual or financial input when it may turn out that there are no customers. You know it perfectly well that many thousand residents of Warsaw are willing to spend holidays in Mazowsze, and those of us who will create satisfactory organisational and technical conditions will get a customer and will achieve an economic effect, which will become a motivation for undertaking this, not another activity.

It is extremely important that it is not only our opinion, that these are not local activities, that the European Community, which is willing to help us in economic transformation of our country, recognizes tourism as the economic branch which has perfect development conditions in Poland. The European Community believes that our tourism-oriented activities will give municipalities and cities a chance to get wealthier. We are a country situated on major transit routes and if we focus our efforts on this branch we may obtain good results.

At the end let me thank Mr Jastrzębski, the Voivode of Warsaw and all his employees for organisational efforts put in organisation of this conference. I would like to thank all voivodes, who hosted working groups in their regions, through them I would also like to thank the hosts of this establishment for a perfect organisation of the conference.

Andrzej Jagusiewicz

Henryk Legienis

### Tourist assets and Tourism Product of Mazowsze

#### Background

The discussed region, often referred to as Mazowsze, embraces seven voivodships: the voivodship of Warsaw, Ciechanów, Ostrołęka, Radom, Płock, Siedlce, and Skierniewice, most of them situated in central Poland. Their boundaries encompass 92 cities and 382 municipalities inhabited by the total number of 5.6 million people. Urban population amounts to 62% and is mainly concentrated in the voivodship of Warsaw. Distribution of population is uneven: the voivodship of Warsaw has the highest population density (almost 640 persons per one square kilometre). Agricultural voivodships of eastern Mazowsze have the smallest number of inhabitants. Structural unemployment seems to be particularly threatening for Ciechanów and Płock voivodships, in which unemployment rate comes up to almost 20%.

Area of the region amounts to 41.5 thousand sq. km., in which forests cover 21%, and waters almost 2%. The whole region is mainly rural areas and farmland, arableland spans over 69% of its area. Small farms with small or medium-sized acreage are most common in the country. Big orchards may be found near Grójec and Góra Kalwaria. Big industry is concentrated in Warsaw and other urban centres such as Płock, Radom, Skierniewice, and Żyrardów. Bigger and compact urbanised areas are also found in Warsaw and Skierniewice voivodships.

The state of the natural environment is different in particular voivodships. It is in the best condition in the eastern part, in which Ciechanów and Siedlce voivodships are the cleanest ones and it is most deteriorated in big industrial centres, such as Warsaw, Płock, Ostrołęka, and Radom. Altogether natural environment in 20 towns and cities, including Konstancin-Jeziorna, seem to be particularly threatened by emission of air pollution. Evaluation of water purity in big rivers, which are a major tourist attraction of Mazowsze, seems to be pessimistic, too. According to general water classification regarding Vistula and Bug rivers, almost the whole of their waters is overpolluted. The state of the Pilica river, Radomka, and Narew seems to be a bit better, as some of their stretches have been classified as second and third category of water purity. Similarly Zegrzyński Lake has the second class of water purity in mean annual section.

Car, rail and air transportation all function in Mazowsze. It should be noted that western part of the region, and especially Warsaw voivodships are more accessible than its remaining

parts. The length of surfaced roads amounts to almost 31 thousand kilometres. Roads, give access to all major tourist destinations. Dense road network, which is close to the national average, exceeds 700 km per 100 sq. kilometres, and reaches the highest value in Warsaw and Skierniewice voivodships. Main directions of international transit are served by Berlin-Warsaw-Moscow (E30) thoroughfare, Gdańsk-Warsaw-Budapest (E77), Warsaw-Wrocław-Prague (E67), and Gdańsk-Łódź- Vienna route (E75). Other important domestic roads frequented by tourists link the capital with Szczecin (n 10), Grodno (n 18), Lublin and Lvov (n 17), Augustów and the Great Masurian Lakes ( n 61), as well as Radom with Rzeszów and Bratislava (n 9).

Rail network is quite dense only in Warsaw and Skierniewice voivodships, where it exceeds average national values. Exploited railway lines total up to 2.5 thousand kilometres, most important are stretches of international and domestic thoroughfares: Berlin-Warsaw-Moscow (E20), Warsaw-Katowice-Vienna (E65), Warsaw-Lublin-Lvov, Warsaw-Białystok-St. Petersburg, Warsaw-Wrocław and Warsaw-Gdańsk. Słubice-Poznań-Warsaw-Terespol route, and routes connecting the capital with Gdańsk, Katowice, and Cracow are suitable for fast passenger trains. These trains make direct connections with some states and their capitals, and other bigger European cities. There is an Eurocity express train connecting Warsaw with Berlin and a number of Intercity trains going from the capital to major Polish cities. Ostrołęka and Płock are two voivodship capitals with least convenient rail connections.

Warsaw has got two airports: domestic and Okęcie international airport, a city terminal being the main junction of passenger air transportation. It serves domestic flights to Gdańsk, Cracow, Szczecin, Wrocław, and Rzeszów, and international connections with the majority of European capitals and some more distant world destinations. Okęcie International airport is at the same time the only border crossing in the region.

### **Natural and Scenic Attractiveness**

The Mazowsze Lowland spreads over the most extense area in the region, which embraces historical, once forest-covered Mazowsze. Its central part is created by Łomżyńskie Międzyrzecze, Warsaw Plain and Warsaw Basin. Vast lowland strip is surrounded by plateau: Płocka and Ciechanowska from the north and Rawska and Siedlecka from the south. Kurpiowska Plain and fragments of Lubawski Hummock and Dobrzyńskie Lake District, which belong to the lake land are most protruded southbound. The Radom Plain located in southern part of the region is located next to forested heights of Iłżeckie Foothills, considered to be a part of Małopolska Upland.

Forests and valleys of big rivers, and especially those surrounded by high escarpments add the dramatic touch to lowland scenery. Picturesque fragments of steep valley slopes may be seen on the Vistula river near Czersk, Wyszogród, and Płock as well on the Narew river between Serock and Pułtusk. Forests, mostly pine, grow on almost 9 thousand sq. kilometres, creating vast forest areas. Bigger remains of ancient Mazowsze forests have survived as primeval forests: Biała, Bolimowska, Iłżecka, Kamieniecka, Kampinoska, Kozieniecka, Zielona, and woods - Garwoliński, Gostyniński, Łukowski, and Otwocko-Celestynowski. They are being visited by excursionists, mushroom and berry pickers, especially during holidays.

Big lowland rivers, including the Vistula and its tributaries - Bug, Narew, Pilica, and Bzura, which are suitable for tourist activities on their less polluted stretches, snake through Mazowsze. Smaller rivers, such as Liwiec, Świder, Radomka, Rawka, Wilga, and Wkra as well as Omulew and Orzyc also have a big tourist value. On the Vistula river, between Płock and Włocławek there is a big artificial water retention reservoir. Zegrzyński Bay spreading over 30 sq. km., with excellent recreational conditions, is another big water reservoir. Numerous sailing, ice-yachting, and canoeing races are held here as well as tourist rallies and parachute jumping to the water. The region has several minor water reservoirs perfect for recreation, especially for weekends.

A bigger number of natural lakes is concentrated in Gostyniński and Dobrzyński lake districts (Płock voivodship) and in the region of Lubawski Hummock (Ciechanów voivodship), which has the total number of 12 big lakes (over 50 hectares). The biggest ones are Zdwojskie lake (350 hectares), Rumian, Urszulewskie and Lucieńskie lakes.

Enclaves of protected nature and natural landscape are made up by Kampinoski National Park, 150 nature reserves, most of which are forest reserves, and almost 4 thousand nature monuments, mainly single trees. Among eight landscape parks most attractive for tourism are Gostynińsko-Włocławski, Górznieńsko-Lidzbarski, Kozienicki, and Nadbużański parks. Also, over 30 areas of protected landscape have been delimited, embracing 90 sq. km of areas, which are attractive for tourism, and especially weekend recreation. Most famous natural rarities include an arboretum and an alpinarium in Rogów, and Czarnia nature reserve with pines giving cover to forest bees, Kępa Gołuska reserve in a bend of the Wkra river with hundred-years old ash trees, sycamores and oaks, on the Świder, a picturesque river stretch with bends and rapids. Natural curiosities also include the biggest erratic blocks in Mazowsze in villages of Zawady and Gozdowo, and jurassic rocks near Iłża.

According to research of Institute of Tourism areas of over 400 sq. km have high natural recreational values. They may be found in 14 municipalities, including Nieporęt and Serock (Warsaw voivodship), Lidzbark, Pokrzywnica, and Rybno (Ciechanów voivodship), Zatory and Somianka (Ostrołęka), Brudzeń Duży, Łack, and Nowy Duninów (Płock voivodship).

These are areas located mainly in the Gostyniński lake district and Lubawski Hummock as well as in the valley of Narew and Bug, including Zegrzyńskie Lake. Altogether, all areas which are attractive with regard to tourism spread over one-fourth of the region. Most of these are forests and land adjoining rivers. Białobrzegi, Brok, Lidzbark, Łack, Otwock, Pułtusk, Serock, Urle, and Wilga are destinations, which are most renown for their recreation values.

Mazowsze has got rural areas suitable for various forms of agrotourism. Most of them are located in Ciechanów, Ostrołęka, and Siedlce voivodships. Altogether over 20 municipalities have perfect conditions for rural tourism. Big groups of such municipalities are situated near Żuromin (e.g. Lidzbark, Lubowidz, Rybno), Zielona Forest (e.g. Czarnia, Kadzidło, Lelis, Łyse), Biała Forest (Brok, Rząśnik), the Bug valley (Ceramów, Kosów Lacki, Sadowne).

Agricultural and forest areas abound in hunting game, which has been estimated at 600 thousand specimens (20% of national resources). One may find here chase game, such as elks, deer, stalks and wild boar. The biggest number of wild boar may be found in Ostrołęka, Radom, and Siedlce voivodships. Most renown stud farms are located in Kozienice, Łack, and Walewice, several horse-riding centres are also found there.

The only health resort in the region is Konstancin-Jeziorna, Warsaw's suburban town, which is also a famous medical rehabilitation centre. It is renown for treatment of hormonal disorder, metabolism and circulatory system diseases. This picturesque health resort with its villa architecture also offers a brine graduation tower and an inhalatorium.

### **Cultural Attractions**

Mazowsze, a historical region of Poland, with centuries-long settlements, is rich in cultural heritage, which attracts thousand of tourists. Its central part surrounding Warsaw boasts particularly valuable historical and cultural resources. There are 50 major destinations with single establishments or groups of establishments of big tourist importance, in which 10 may be recognised as particularly interesting for international visitors.

Warsaw, as a capital and historical, cultural, scientific, commercial, and tourist centre, is the leading city of the region. Cities featuring numerous monuments include Łowicz, Płock, and Pułtusk, one of the major historical centres of Mazowsze. Particularly important tourist destinations with outstanding or even unique monuments are: Arkadia, Boguszyce, Nieborów, Niepokalanów, Treblinka, Warka, and Żelazowa Wola. Destinations with groups of monuments include Łęczyca, Szydłowiec, Siedlce, Skierniewice, and Rawa Mazowiecka, and single establishments in Czerwińsk, Opinogóra, Brochów, Oporowo, Czersk, Modlin, and Czarnolas. There are 17 pilgrimage centres, including Warsaw (the grave of cardinal Stefan

Wyszyński and Jerzy Popiełuszko) and Niepokalanów (the cult of st. Maksymilian Kolbe) visited by pilgrims from all over Poland.

Warsaw with its most magnificent examples of Baroque and Classicist architecture in Poland, is the most important sightseeing and cultural attraction. Most valuable monuments are concentrated within the Old and New Town, in the historical City, Łazienki, and Wilanów. Reconstructed Old Town was recognised a World Cultural Heritage Monument. Along the Royal Route linking the Castle Square with the former Ujazdów village one may see numerous magnificent buildings, such as groups of burgher's houses, a gothic St. John's cathedral, the Royal Castle, Baroque and Classicist churches and monasteries, e.g. Evangelical-Augsburg, Visitant, and Holy Cross churches, the latter featuring an epitaph with the heart of Frederick Chopin. The route is surrounded by the biggest cluster of aristocratic and royal mansions in Poland (over 30 palaces), including the Rzeczpospolita Palace, Ujazdowski Castle, Belvedere, and the Palace on the Water in Łazienki. Little bit further in Wilanów is situated an impressive royal residence of the Jan the Third Sobieski. Warsaw is the biggest centre of various scientific and cultural institutions, and an international congress and fair centre. The capital hosts numerous international cultural and art venues, and events. It has 28 theatres and musical establishments, including Teatr Wielki and the National Philharmonics.

Various monuments of art and architecture situated outside Warsaw, testimonies to the splendour of this land, and created by such great artists like Tylman of Gameren, Jakub Fontana, Dominic Merlini, and Michał Palloni, have been preserved in Mazowsze. Płock, with its 100 monuments, has the biggest number of such historical establishments. Atop Tumski Hill there is a medieval castle with a cathedral and the former Benedictine abbey, and well-preserved early Romanesque relics: a palatium and a rotunda dating back to 11c. Other valuable sacral buildings in Mazowsze include a Romanesque collegiate church in Tum (near Łęczyca), Romanesque and Gothic cathedral in Płock and a Gothic church in Szydłowiec, Renaissance shrines in Brok and Pułtusk, and a fortified basilica in Brochów. Baroque churches in Łowicz, Węgrów, Skrzynne and a Rococo church in Kobylka are yet other outstanding masterpieces. The oldest, originally Romanesque and Gothic monastery include abbeys in Czerwińsk-on-Vistula and Sieciechów. Sacral wood architecture is represented by numerous little rural churches - a Gothic church in Janisławice, and Baroque churches in Barcice, Gąsiorowo, and Goźlin. The most valuable masterpiece of all is a late Gothic church in Boguszyce, interior of which is ornamented with magnificent Renaissance wall-paintings, Gothic paintings and sculptures.

Castles of Mazowsze, altogether there is more than a dozen of them, have been preserved in full or in big fragments. Most notable castles are turned into museums or into other cultural

establishments. These are remains of Gothic royal castles in Płock and Łęczyca and of a castle of Masovian dukes in Liw, as well as medieval knightly and aristocratic mansions in Oporów, Szydłowiec, and Drzewica, and a castle of Teutonic Order in Działdowo. Later establishments include a Baroque castle of Płock bishops in Pułtusk (converted into Polonia House), and a neo-Gothic castle of the Krasiński family in Opinogóra housing a Museum of Romanticism. Medieval castles of Masovian Dukes in Ciechanów, Czersk, and Rawa Mazowiecka have remained till the present day as a preserved ruin. An amazing example of a modern fortified building is a magnificent stronghold in Modlin, dating back to the Napoleonian times.

More common are aristocratic park-surrounded mansions. There are over 50 of such establishments featuring interesting architectural arrangements. There are magnificent Baroque palaces in Nieborów, Otwock Wielki, and Chrzęsne, Classicist palaces in Jabłonna, Mała Wieś, Młochów, Słubice, Sterdynia, and Śleszyn Wielki, and Neo-Gothic in Stara Wieś, and Patrykozy. A sentimental-romantic park of Helena Radziwiłłowa in Arkadia, one of the most impressive monuments of garden art is a truly outstanding masterpiece of its times. Other stunning palaces may be also seen in Falenty, Radziejowice, Siedlce, and Skierniewice.

Mazowsze boasts numerous manor houses - notable are those connected with lives and work of famous Polish personages - Czarnolas (the house of Jan Kochanowski), Żelazowa Wola and Sanniki (connected with Chopin), Głuche (Norwid), Wola Okrzejska and Poświętno (Sienkiewicz), and Mińsk Mazowiecki (Andriolli). The former manor house of Józef Brandt in Orońsk has been turned into a plein-air sculpture centre, whereas in Petrykozy, the historical manor house hosts a private gallery owned by Wojciech Siemion.

Other domains of the old material culture of Mazowsze are well represented in this region. One may come across numerous archaeological monuments - on open land these are usually ruins of a town, barrows, and ancient burial grounds. Most valuable relics include finds from the village of Całowanie, where a repeatedly populated camp of reindeer hunters established about 10 thousand years ago has been excavated. Among monuments of modern technology one will be intrigued by a 19 c. foundry in Chlewiska.

Historical and war souvenirs dating back to 19c battles and upraises and world wars are spread all over Mazowsze. A dramatic battle fought by Tadeusz Kościuszko near Raclawice is commemorated by a barrow. Monuments in Wawer (Warsaw), Iganie and Ostrołęka remain of the biggest battle of the 1830 November Uprising. Numerous cemeteries and graves of 1963 fighters are testimonies to hundreds of small battles fought in Biała, Zielona forests, and in the vicinity of Węgrów. The Napoleonian era was marked with great battles fought by Polish soldiers near Raszyn, and by the French - near Pułtusk and Ostrołęka. During the Second World War extremely severe battles were fought in the region of Mława, Modlin,

Różan and Kutno (the battle on Bzura). At the end of the war the most decisive were fights of Warsaw fought near Radzymin and Wołomin, and fights on the warecko-magnuszewski bridge-head, where the great tank battle of Studzianki is commemorated by a mausoleum and a wartime skansen. Symbolic places of martyrdom, commemorated by monuments include the Remembrance and Martyrdom Route and the prison of Pawiak and Cytadela in Warsaw, the former Nazi camp in Treblinka, cemeteries in Palmiry and Wola Gułowska.

Mazowsze is rich in museum establishments exhibiting interesting collections from various fields. About 100 museums situated in over 40 destinations are annually visited by 2.9 million visitors. Warsaw has the biggest number of such establishments (over 50), major museums include the National Museum and its divisions in Łazienki, Wilanów, and Królikarnia, and Archaeological, Ethnographical, Historical, Polish Army and other museums. Other popularly visited museums located outside Warsaw include the birthplace of Frederick Chopin in Żelazowa Wola and palace-turned museums and castle-turned museums in Nieborów, Arkadia, Szydłowiec (Folk Musical Instruments Museum), Opinogóra (Museum of Romanticism), Liw, Łęczyca, and Oporów. Various regional collections are displayed by the Mazowsze Museum in Płock (with a unique collection of art nouveau), district museums in Ciechanów, Ostrołęka, Radom, and Siedlce and regional museums in Pułtusk, Rawa Mazowiecka, Ilża (a ceramic collection), and others.

Mazowsze is the birthplace of many famous Poles. Biographical museums situated in Czarnolas (Kochanowski), Lipce Reymontowskie (Reymont), Wola Okrzejska (Sienkiewicz), Warka (Pułaski), Przysucha (Kolberg), and Warsaw (Curie-Skłodowska) pay tribute to their memory. A genuine tourist rarity is the Old Rail Museum in Sochaczew, which organises old train rides.

The traditional folk culture of Mazowsze had great contributions to the national folklore. Most notable are the Kurpie from Zielona and Biała Forests and the Księżacy living near Łowicz. Numerous forest-surrounded Kurpie villages still boast live folklore and art, expressed by timber architecture, decorative art, costume, observances, dialect, and crafts. Major Kurpie centres are Kadzidło, Łyse, and Myszyniec in the Zielona Forest. One may see there well-preserved old architecture, costumes, observances, skills of rug, paper cut-outs and pottery, there are sculptors and regional troupes ("Kadzidło" and "Kurpie Zielone"). Major destinations in Biała Forest are villages of Obryte and Rząśnik (traditional architecture, women's costume, paper cut-outs, "Kurpie Białe" folk troupe).

On the Księżacki land, besides Łowicz with its Łowicz Museum, most famous are villages of Złaków Borowy and Złaków Kościelny where one may see original Łowicz costumes, weavers' workshops, paper cut-outs making and festive religious celebrations. Other minor enclaves of the Masovian folklore have been preserved near Sanniki (folk costume, weaving,

cut-outs, and Eastern egg making.), Kolbiela on the Świder river (weaving, folk costume, plaiting, and paper cut-outs), Węgrów (weaving, and rug making), and Zawidz Kościelny (folk sculpture). Most famous for folk pottery are Iłża, Bolimów, and Pułtusk. It is worth noting, however, that Karolin (Otrębusy) houses the seat of the world-famous "Mazowsze" troupe.

Northern and eastern Mazowsze still boasts the traditional rural wood architecture, although nowadays it becomes rare. Valuable examples of wooden architecture and material culture are gathered in skansens and museum establishments. The biggest one is the Mazovian Village Museum in Sierpce and the Radom Village Museum in Radom. The village of Sromowo hosts the biggest gallery of folk sculpture in Poland, which is famous for its "Thousand Years' Procession", owned by a family of farmers - the Brzozowscy.

Cultural life flourishes in Mazowsze. It is clearly visible thanks to 60 different international and national cultural and art events. These venues are organised in about 20 destinations, the majority of them are held in Warsaw and Siedlce. Additionally, numerous local events and celebrations are held in small towns and villages.

Major music events are international venues held in Warsaw - Witold Lutosławski Composers' Contest, Stanisław Moniuszko Contest, "Warsaw's Autumn" Modern Music Festival, Chopin and Mozart Competition, as well as International Shanty Night in Siedlce and International Organ and Church Music Festival in Radom. Worth mentioning are also concerts of Chopin music in Żelazowa Wola, Heavy Metal Festival held in Ciechanów Castle, and Schaeffer Festival in Radom. In other fields of art there are international events such as Catholic Film Festival in Niepokalanów, Creative Workshops in Chlewiska, Poster Biennale in Warsaw, Gombrowicz Festival in Radom, Autumn Theatre Encounters in Kutno, Płock Culture Spring and Leśmian Days in Iłża.

Mazowsze is rich in folk events and celebrations which are very popular among tourists. Worthwhile are the International Folk Festival in Siedlce, the National Musical Instrument Competition in Szydłowiec, "Kupalnocka" - the International Folk Troupe Festival in Ciechanów, and Łowicz Folklore Biennale in Łowicz. Very impressive are also Lipiec Markets and Wedding Meetings held in Lipce Reymontowskie, Palm Sunday (with the best palm competition) in Łyse, the Kurpie Honey Harvest in Myszyniec and Czarnia, Sannicka Sunday in Sanniki, Apple Blossom Holiday in Grójec, Vistula Days in Wyszogród and others.

Among renown and popular tourist events are canoe rallies - Winter Rally on the Narew river, on the Orzyc river held in May, and the Blue Stripe of Pilica Rally. Sailing races are held on the Żegrze Lake. Bicycle and pedestrian trips are also very popular - worth remembering are S. Turkawka Praga Bicycle Rallye, On the Jan Kochanowski Trail, Ciżemka National Rallye, and a pedestrian hike along the Bug river.

Warsaw hosts numerous congress events and fairs. The International Book Fair is one of the most prestigious events. Various commercial exhibitions and conventions are usually organised in "Victoria" and "Forum" hotels and in the Palace of Science and Culture.

The past, culture, and monuments of Mazowsze may be seen while touring along special historical study routes. Most attractive touring routes are the Chopin Trail running from Warsaw, to Płock through Żelazowa Wola and Sanniki, the Vistula Trail connecting Warsaw and Płock via Modlin and Czerwińsk ( a fragments of the landscape thoroughfare - the so-called "Vistula route"), the Łowicz Trail running from Warsaw to Łódź via Skierniewice, Nieborów, Łowicz, Kutno, and Łęczyca, the Płock Route cutting its way across the former Duchy of Płock along the Warsaw route via Pułtusk, Ciechanów, and Sierpc to Płock, the Kurpie Route forming a ring between Ostrołęka and Łomża, encompassing Kadzidło, Myszyniec, Czarnia (and Łomża's Nowogród).

### **Service Infrastructure**

In the seven discussed voivodships tourist accommodation establishments offer the total number of 40.7 thousand places of accommodation, what constitutes a small part, barely 6% of national resources. Seasonal accommodation is the most dominant type - 57% of all places of accommodation is available in establishments open only in the summertime. As for the whole accommodation base, the majority of places are available in holiday centres or summer camps, which altogether offer the total number of 14.2 thousand places (35% of all places). Hotels and similar establishments have the second biggest number of places (11.4 thousand places), groups of holiday bungalows (4.6 thousand), camp sites and trailers (3.5 thousand) and rented rooms (2.1 thousand).

Tourist accommodation is available in 140 cities and municipalities. Warsaw has the biggest number of accommodation establishments - 11.4 thousand, mostly in hotels. Several municipalities have an accommodation potential exceeding one thousand places. These are Brok, Łack, Serock, Somianka, Wilga, and others. According to the Main Statistical Office of Poland, in municipalities located on the Zegrze Lake there are 2.5 thousand places available. In reality there are many more. Most of are offered by holiday hotels of usually high standard, in which over half is occupied all year round. Some of them, the so-called training and holiday centres, have conference facilities what allow for organisation of various courses, conferences and conventions. Bigger tourist destinations on the Zegrze Lake, such as Jadwisin, Jachranka, Nieporęt, Rynia, Serock, and Białobrzegi are popular water sports centres offering a big number of sailing harbours.

The Gostynin Lake district is yet another important holiday destination area with accommodation base of 4 thousand places. Its major tourist destinations, such as Łack, Grabina, and Soczewka are popular summer holiday villages. Other areas used for recreation spread in the valley of Liwiec (Urle, Kamieńczyk), Narew (Popławy, and Lubiel Nowy), and Bug (Brok in the Biała forest and Somianka), environs of Wilga in Garwolińskie forests and Białobrzegi and Warka on Pilica, as well as a part of Dobrzyńskie lake district (Lidzbark). Since quite recently, apart from traditional holidays, many holiday centres of Mazowsze host children's summer camps.

Occupancy rate of all tourist accommodation establishments resulting from their actual occupancy period slightly exceeded the national average and on the average amounted to 43%. The highest indicator has been reported in Siedlce voivodship, and the lowest in Skierniewice voivodship. It should be noted, however, that in certain voivodships the occupancy rate in off-summer-season was higher than in July and August. This was the case, for instance, in voivodships of Ciechanów and Warsaw as well as Siedlce, where it exceeded 70% in both January and July.

Numerous tourist establishments, especially holiday and children's camps centres, although functioning according to market principles, are owned by various companies and institutions. Major owners of accommodation infrastructure include Orbis SA, sport and recreation centres, and regional and local tourist enterprises. Altogether they have 30% of all resources of the region at their disposal. 30 establishments serving tourists, with the total number of barely one thousand places, are owned by individuals.

Hotels and similar establishments, such as motels, pensions, and holiday hotels are usually occupied all year round, and provide services to various segments of tourism traffic, mainly holiday-makers and people travelling on business. The biggest groups consists of hotels - 50 hotels with 9.5 thousand places of accommodation. Motels and pensions have a very limited accommodation potential (280 places and 240 places, respectively) what indicates possibilities for their development, especially in the vicinity of big cities. The majority of hotels (90%) are located in Warsaw and voivodship capitals. Radom, which lacks this type of infrastructure is an exception. The capital city boasts 23 hotels, in which 3 are 5-star hotels ("Victoria", "Marriott", and "Bristol"), 8 are 4-star hotels, and the remaining having from one to three stars. Warsaw lacks cheaper hotels of lower categories which would meet standards of similar European establishments. In Ciechanów, Płock, and Skierniewice there are 3-star hotels, whereas Ostrołęka and Siedlce have establishments of lower standard. Altogether the region has 12 luxury hotels with 3.1 thousand rooms, in which 6 thousand places are available in Warsaw.

Between January and October 1992 occupancy rate in all hotels of Mazowsze amounted to 41%, that is a bit higher than in other parts of Poland. This value came close to 55% in Warsaw, and almost reached 80% in 5-star hotels. In other voivodship capitals the best indicators have been reported in hotels in Ciechanów (63%). Very low (below 35%) was occupancy rate in Ostrołęka, Płock, Radom, and Skierniewice voivodships.

Among discussed accommodation establishments most attractive are establishments seated in historical buildings, especially castles, palaces, and manor houses. Truly exceptional is the seat of Polonia House in Pułtusk, situated in the former castle of Płock Bishops. Polonia House is a hotel, deals with cultural and recreational activities for Poles living abroad. Among other historical buildings of Mazowsze turned into tourist accommodation establishments worth mentioning are buildings in Chlewiska, Łack Stara Wieś, Wola Suchożebrska, Żeliszew, Nadarzyn and Paprotnia.

In many little towns and villages of Mazowsze one may see private "second houses" used by their owners for weekends and holiday stays, sometimes rented out to relatives, friends or strangers. Bigger groups of this type of unregistered and usually seasonal accommodation are situated in valleys of the Bug, Liwiec, and Narew rivers. Big and compact settlements may be found for instance in Brok, Brańszczyk, Kamieńczyk, Kuligów, Świnotop, and Tuchlin.

Rivers of Mazowsze create attractive routes for tourist excursions. Each year, canoe rallies are organised on the Bug, Pilica, Orzyc, and Rawka rivers. Narew, the most popular water thoroughfare to Masurian and Augustowskie Lakes, is the most popular canoeing and sailing trail. Several water hostels (e.g. in Zegrzynek, Pułtusk, and Różan) have been erected along the trail.

Pedestrian lowland trails run through the most interesting historical and picturesque areas and destinations. Their total length exceeds 3 thousand kilometres. They are usually suitable for bicycling excursions, and skiing in winter. Popular routes include those in Kampinoski National Park and Biała, Kamieniecka, Kozienicka, and Zielona Forests. Among others worth mentioning are the Sienkiewicz Trail in the environs of Wola Okrzejska and Gułowska, Battles on Bzura Trail in the region of Kutno, and Sochaczew and General Franciszek Kleeberg and major Hubal trails.

Travel agencies operate in the discussed voivodships. There were over 800 of them in 1992, with the biggest number based Warsaw. During the past three years their number has gone up drastically thanks to establishments of a big number of small and medium-sized private companies. The majority of big national travel agencies, which have their own offices and own accommodation infrastructure are also on the market. Private travel offices own several service establishments, accommodation potential of which is still very limited.

Nationwide research conducted by the Institute of Tourism shows that the majority of tourist enterprises operating in the region offer domestic services and organisation of tours, holidays, summer children's and youth's camps or deals with their sales. A significant number of these agencies deal with foreign visitors to Poland, and especially citizens of the former USSR and Germany. Services provided to foreign tourists are mostly accommodation reservation and catering.

### **Tourism Traffic**

Domestic tourism traffic in discussed voivodships is rather diversified. It has been estimated that some 6 million holiday and weekend trips to destinations of Mazowsze (with at least one overnight stay) were taken in 1992. That comes up to 10% of all trips taken in Poland. Only the Warsaw voivodship, estimated at some 3-4 million trips, have got into the national lead. Lower standing was taken by voivodships of Radom and Płock, whereas the remaining voivodships came under the lowest number of trips (some 100-200 thousand). Areas adjoining the Warsaw agglomeration are characterised by a big number of persons going away for the weekend, visiting friends and relatives or going to their summer houses.

In the whole region tourism traffic registered in accommodation establishments was characterised by the following values: 15 million visitors and 3.9 million of overnights provided. The highest occupancy rate was recorded in the Warsaw voivodship, which captured 65-70% of the whole traffic. In Warsaw itself most dominant were one or two-day trips. Almost 1 million persons checked into accommodation establishments, which in turn provided almost 2 million overnights. Slightly longer stays, on the average lasting about seven days, were recorded on the Zegrze Lake, where over 30 thousand tourists stayed in the registered accommodation. Gostynińskie Lake District attracted over 20 thousand persons who stayed a bit longer - almost fortnight. Apart from voivodship capitals a relatively big number of overnight visitors was captured by such towns and municipalities as Brok, Gostynin, Grójec, Łąck, Łowicz, Pułtusk, Serock, and Wilga.

700 thousand foreign visitors were reported to have stayed in accommodation establishments in Mazowsze, which provided 1.5 million accommodations to them. The mainstream of incoming traffic, almost 90%, was captured by Warsaw and other voivodship capitals. A big number of foreign tourists visited Grójec, Łowicz, Pułtusk, and Serock. Over half a million visitors were provided accommodation in the capital. An identical number of foreigners entered Poland through the border crossing in Okęcie. Among arriving tourists the biggest number of visitors originated from the United States, Germany, Great Britain and France. Research of the Institute of Tourism shows that about 15% of all visitors to Poland visit Warsaw, though a significant number of them is just passing by or stay with their families.

Tourist motives are the prevailing purpose of foreigners' arrivals to the capital. Generally speaking, foreign stays in cities are usually connected with business trips or trips for professional purposes.

### **Regional Tourism Product**

Regional tourism product of Mazowsze is basically defined by the existing tourist resources, which point out to big possibilities for development of an offer. Bearing that in mind and evaluating the region one may draw the following conclusions:

- rich historical and modern cultural resources play the leading role in tourism product development.
- a special role is played by Warsaw - a unique big administrative, historical, scientific, cultural, art, commercial and tourism centre of international importance.
- most tourist municipalities of Mazowsze should switch to provision of services for the regional and local market, only few cities such as Warsaw, Płock, Pułtusk, and Łowicz may appear as competitive on the Polish, or even international market.

Taking into account broader prerequisites one may generally indicate prospects for further tourism product development and enrichment of tourism offer of Mazowsze. Major types of this product should include:

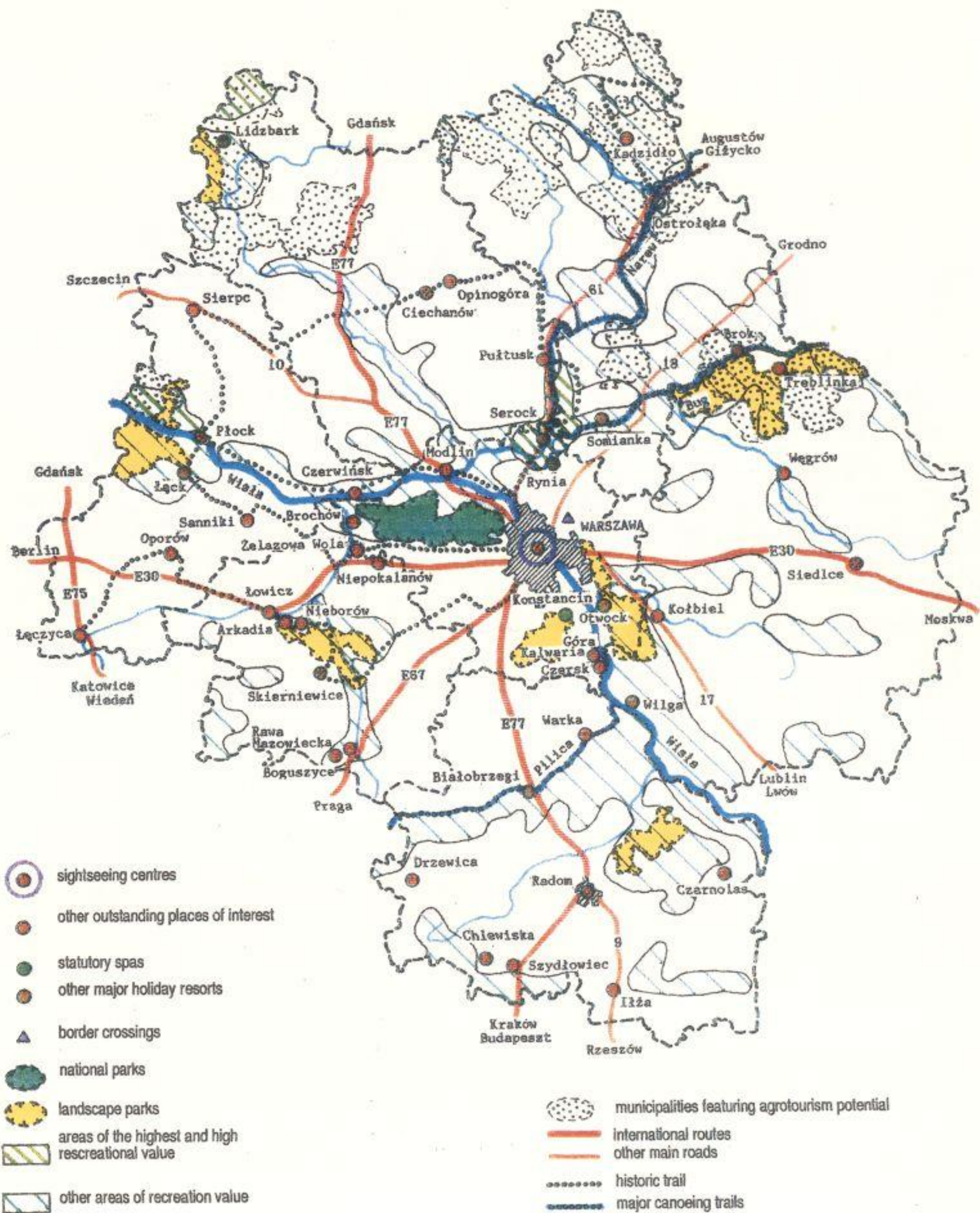
- weekend stays in tourist accommodation combined with recreation, sports, sun bathing, walks, excursions, mushroom-picking and others.
- trips to Warsaw combined with sightseeing of Warsaw's monuments in the city and its environs, shopping, participation in cultural and art events, trips to museums, exhibitions etc.
- specialist stays in the capital combined with participation in conventions, congresses and conferences, festivals and contests, fairs and exhibitions and sport events, celebrations, holidays and others.
- business trips with a special recreational and sightseeing package.

- events connected with life and art of Frederick Chopin, combined with visiting places and souvenirs of the great composer and participation in concerts (Warsaw, Żelazowa Wola, Sanniki).
- encounters with Mazowsze folklore, especially the folklore of Kurpie and Łowicz, combined with trips to villages which preserved their living folklore and folk art, participation in observances and regional holidays, fairs and crafts exhibitions, visits to workshops and to folk artists, trips to skansens, and ethnographic collections etc.
- trips to Kampinos National Park, nature reserves and landscape parks,
- pedestrian and bike rides and excursions, especially along marked routes in Biała, Kamieniecka, and Kozienicka forests.
- canoe rallies down Bug, Narew, and Pilica rivers.
- sport and health treatment summer camps for school children and youths,
- "green schools" during school year,
- mushroom, berry and forest fruit picking trips,
- holidays in holiday centres on lakes, rivers in the forest, for instance in Brok, Łack, Wilga and resorts on the Zegrzyńskie Lake,
- trips to horse stud farms and "holidays in the saddle",
- old train rides from Sochaczew,
- weekend and holidays stays in private summer houses (on the Bug, Liwiec, and Narew rivers),
- stays on farms (agrotourism) combined with work on the farm and wholefood tasting.

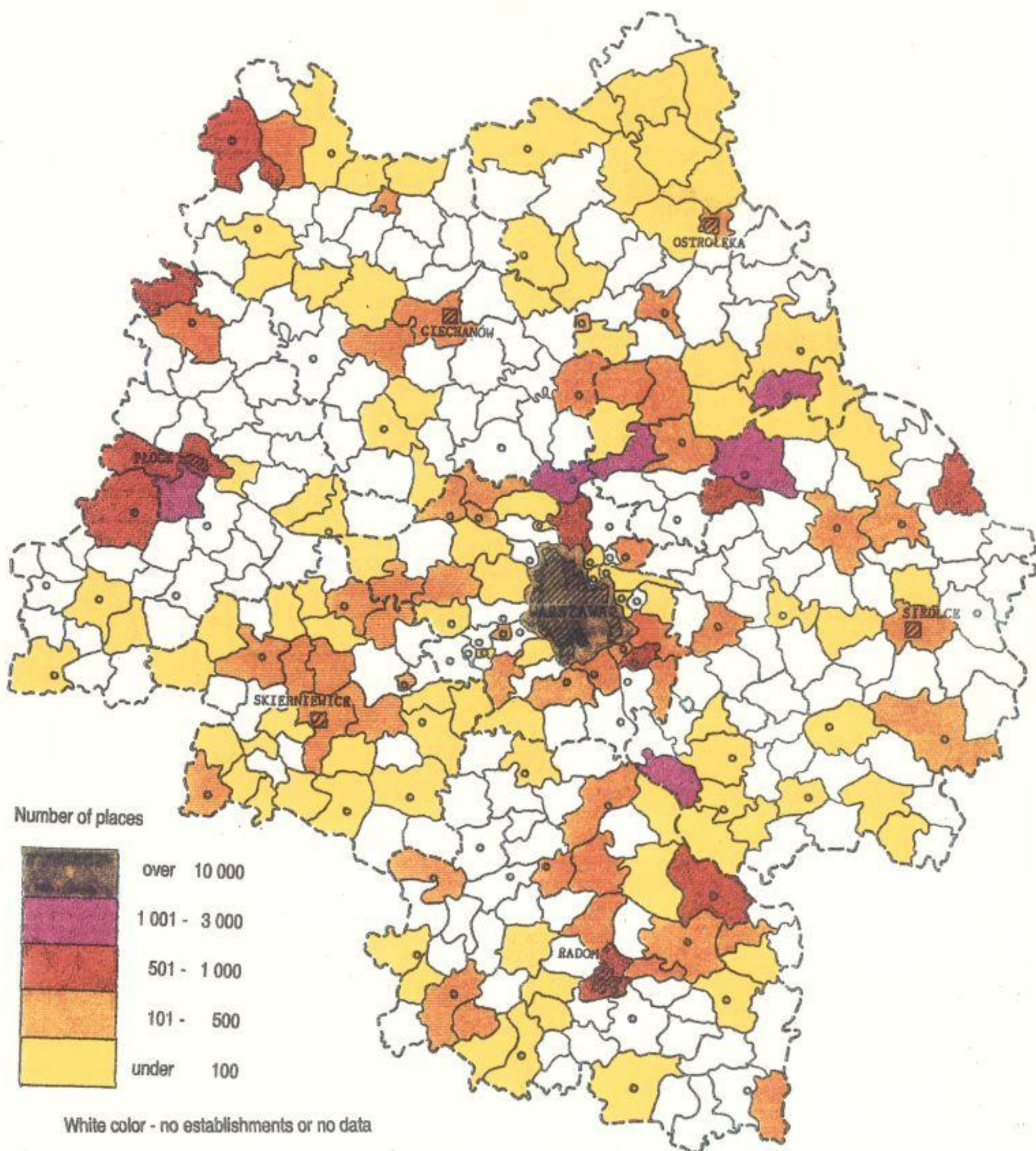
Report includes data of the Main Statistical Office of Poland, Institute of Tourism and questionnaires sent in by cities, towns and municipalities.



# TOURIST VALUES

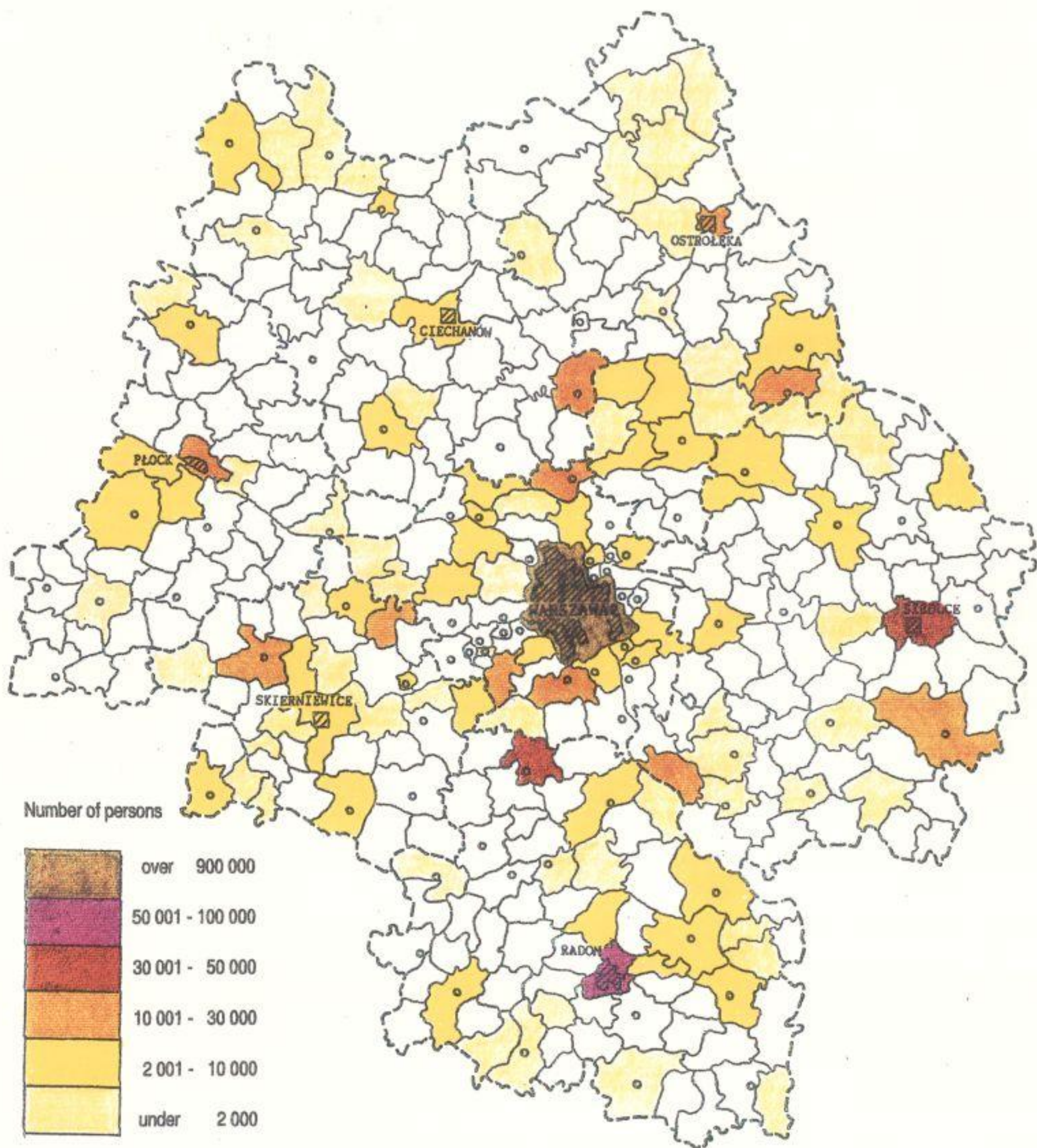


# TOURIST ACCOMMODATION ESTABLISHMENTS IN 1992



# GUESTS IN TOURIST ACCOMMODATION ESTABLISHMENTS

(between X.91 - IX.92)



White color - no establishments or no data

INTERNATIONAL VISITORS IN TOURIST ACCOMMODATION ESTABLISHMENTS

(between X.91 - IX.92)

