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**A Report on Possibilities
of Development of Tourism**

FROM UK TO POLAND

**(using Bournemouth International Airport
as a Gateway)**

May, 1993

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Summary

- * A major objective of the study is to provide useful information for developement of Bournemouth International Airport as a gateway to Eastern Europe and to promote Poland as a tourist destination as well.
- * The overview of major data of British tourism is presented, accompanied by some information concernig incoming tourism to Poland; especially a profile of British tourist visiting Poland is highlighted.
The report contains the review of Polish tourist attractions: landscape, heritage, and those for sport/active holidays use.
- * As possible counterparts, four of Polish airports are taken under consideration : Warsaw, Krakow, Poznan, Gdansk.
Technical information about the airports are included, as well as general information on Polish air travel industry.
- * Also names and adresses of main Polish tourist and trade institutions can be found (-> Annex 1).
As well as listing of more important Trade Fairs and Cultural Event which are organised in Poland in 1992 (-> Annex 2).
- * The report is supplemented with the bibliographical guideline for further study of Polish tourism and economy.

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Chapter I. From UK

Table 1.

UK RESIDENTS' OVERSEAS TRAVELS by main purpose of visit (thousands)

Destination:

All areas

	1990	1991	1st qtr 91	2nd qtr 91	1st qtr 92	2nd qtr 92
holiday	21255	20630	3101	5223	3692	6285
business	4807	4770	963	1321	1163	1317
VFR	3963	3882	817	978	868	1068
Misc	1157	1215	207	302	299	300
all visits	31182	30497	5088	7824	6022	8971

Change Q1+Q2 '92/Q1+Q2 '91: 16%

Total Expenditures (£m)	9916	9834	1572	2383	1945	2738
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Change Q1+Q2 '92/Q1+Q2 '91: 18%

Eastern Europe

	1990	1991	1st qtr 91	2nd qtr 91	1st qtr 92	2nd qtr 9
holiday	254					
business	82					
VFR	63					
Misc	19					
all visits	417	501	79	117	101	131

Change Q1+Q2 '92/Q1+Q2 '91: 18%

All areas /by air

	1990	1991	1st qtr 91	2nd qtr 91	1st qtr 92	2nd qtr 9
holiday	14490	13603	2166	3292	2592	4244
business	3767	3613	724	952	915	1030
VFR	2722	2557	613	603	654	734
Misc	494	400	67	114	89	144
all visits	21474	20173	3570	4961	4250	6153

Change Q1+Q2 '92/Q1+Q2 '91: 22%

Eastern Europe 351 401

source: BUSINESS MONITOR - QUARTER II 1992
(Overseas travel and tourism)

Table 2.

International passengers by air: arr+dep 1991
(major airports servicing flights to Eastern Europe.)
(thousands)

	Eastern Europe (exl. USRR)	total
London	617	52694
Birmingham	13	2489
Glasgow	13	1868
Belfast	9	343
Manchester	73	8161
Edinburgh	6	370
Newcastle	13	963
other	60	2710

source: TRANSPORT STATISTICS GB 1992

Table 3.

International Air Passenger Traffic to and from UK Airports for 1990

Destination:	1989			1990		
	total	sched	chart	total	sched	chart
POLAND (total)	161914	157907	4007	172547	170264	2283
London						
- Gdansk	2332	2332	-	5327	5327	-
- Krakow	3334	3328	16	8466	8405	61
- Warsaw	152335	152247	88	154632	154071	561
other routes	3903	-	3903	4122	2461	1661

source: UK AIRPORTS,
ANNUAL STATEMENTS OF MOVEMENTS
PASSENGERS AND CARGO 1990 . CAA

Table 4.

Air travel to Europe, years 1987-1989

Group	population (thousands)	travel type			
		Holiday		Business	
		%	index	%	index
All adults	45122	29.9	100	2.9	100
region of residence:					
London	10901	36.2	121	4.6	157
South	4998	29.5	99	4.4	150
East of England	3934	26	87	1.8	62
Wales&West	4345	26.9	90	2.3	77
Midlands	8922	27.7	93	2.4	82
North West	6079	32.3	108	2.2	75
Yorkshire	5371	27	90	2.1	71
North East	2669	26.5	89	1.6	56
Central Scotland	3002	25.4	85	1.6	55
North East Scotland	1056	24.1	81	1.8	61
Border	611	21.9	73	0.8	28
London generates	38%	of total business flights to Europe			
South -	17%				
East -	12%				
Midland -	16%				

source: TARGET GROUP INDEX 1989
HOLIDAY & TRAVEL

Table 5.

Proportion taking and least one Holidays 1991

All UK	60%
region of residence:	
London	57%
South East	64%
South West	50%

Table 6.

Numbers taking holiday by region of residence
(millions)

	Home	Abroad	% Abroad
London	3.4	3.0	47
South East	6.5	4.2	39
South West	2.0	1.2	37

source: THE UK TOURIST OUTBOUND
A MARKET PROFILE 1991

International Passengers by Air to and from Poland.

Table 7.1.

Passengers to and from Poland 1992, up to Q3

	Total	Business	Leisure	VFR	Misc	Other
Total	152887	63073	31575	45099	11672	1458
Oversea Departures	21930	8647	3872	2463	6226	723
UK Departures	54653	20797	13173	17427	2883	373
Oversea Arrivals	21650	10862	2824	5362	2240	362
UK Arrivals	54643	22768	11705	19847	323	0

Table 7.2.

UK passengers to and from Poland by region of residence, 1992, up to Q3.

	Total	Business	Leisure	VFR	Misc	Other
Total	109,296	43,564	24,879	37,274	3,206	373
North	2,421	663	704	1,054	0	0
Yorkshire&Humberside	4,416	1,269	272	2,874	0	0
East Midlands	8,660	4,398	3,161	618	483	0
East Anglia	1,154	0	812	342	0	0
Greater London	40,873	14,793	8,007	16,757	944	373
Rest of South-East	25,482	12,733	5,495	6,826	429	0
West Midlands	3,021	999	271	1,428	323	0
North West	6,872	2,482	1,672	2,718	0	0
South West	5,343	1,680	2,465	1,198	0	0
Scotland	8,623	3,626	1,017	2,953	1,027	0
Wales	1,154	646	0	507	0	0
others	1,278	275	1,003	0	0	0

Table 7.3.

UK departures to Poland by region of residence, 1992 up to 3Q.

	Total	Business	Leisure	VFR	Misc	Other
Total	54,653	20,797	13,173	17,427	2,883	373
North	0	0	0	0	0	0
Yorkshire&Humberside	1,812	1,269	272	270	0	0
East Midlands	3,058	1,957	0	618	483	0
East Anglia	1,154	0	812	342	0	0
Greater London	22,498	6,723	5,509	8,950	944	373
Rest of South-East	11,070	6,173	2,522	1,946	429	0
West Midlands	615	0	271	343	0	0
North West	3,008	284	1,009	1,716	0	0
South West	4,142	1,680	1,761	701	0	0
Scotland	5,867	1,789	1,017	2,034	1,027	0
Wales	1,154	646	0	507	0	0
others	275	275	0	0	0	0

Table 8.1.
Passengers to and from Poland 1991

	Total	Business	Leisure	VFR	Misc	Other
Total	175,518	73,845	32,327	56,371	11,426	1,549
Oversea Departures	33,748	15,111	3,826	10,498	3,164	1,150
UK Departures	52,796	24,890	12,476	13,722	1,309	399
Oversea Arrivals	27,434	9,898	4,223	9,192	4,121	0
UK Arrivals	61,540	23,946	11,802	22,960	2,831	0

Table 8.2.
UK passengers to and from Poland, by region of residence 1991

	Total	Business	Leisure	VFR	Misc	Other
Total	114,336	48,836	24,278	36,682	4,141	399
North	1,740	759	747	235	0	0
Yorkshire&Humberside	7,253	1,954	1,087	3,592	620	0
East Midlands	2,727	1,674	786	266	0	0
East Anglia	2,873	1,263	409	1,200	0	0
Greater London	49,825	18,644	13,065	17,716	0	399
Rest of South-East	28,185	15,756	3,857	7,210	1,363	0
West Midlands	4,250	2,321	216	1,713	0	0
North West	6,443	3,202	2,090	471	680	0
South West	3,876	1,220	550	2,107	0	0
Scotland	3,620	468	1,472	1,681	0	0
Wales	1,932	457	0	275	1,200	0
others	1,611	1,117	0	216	278	0

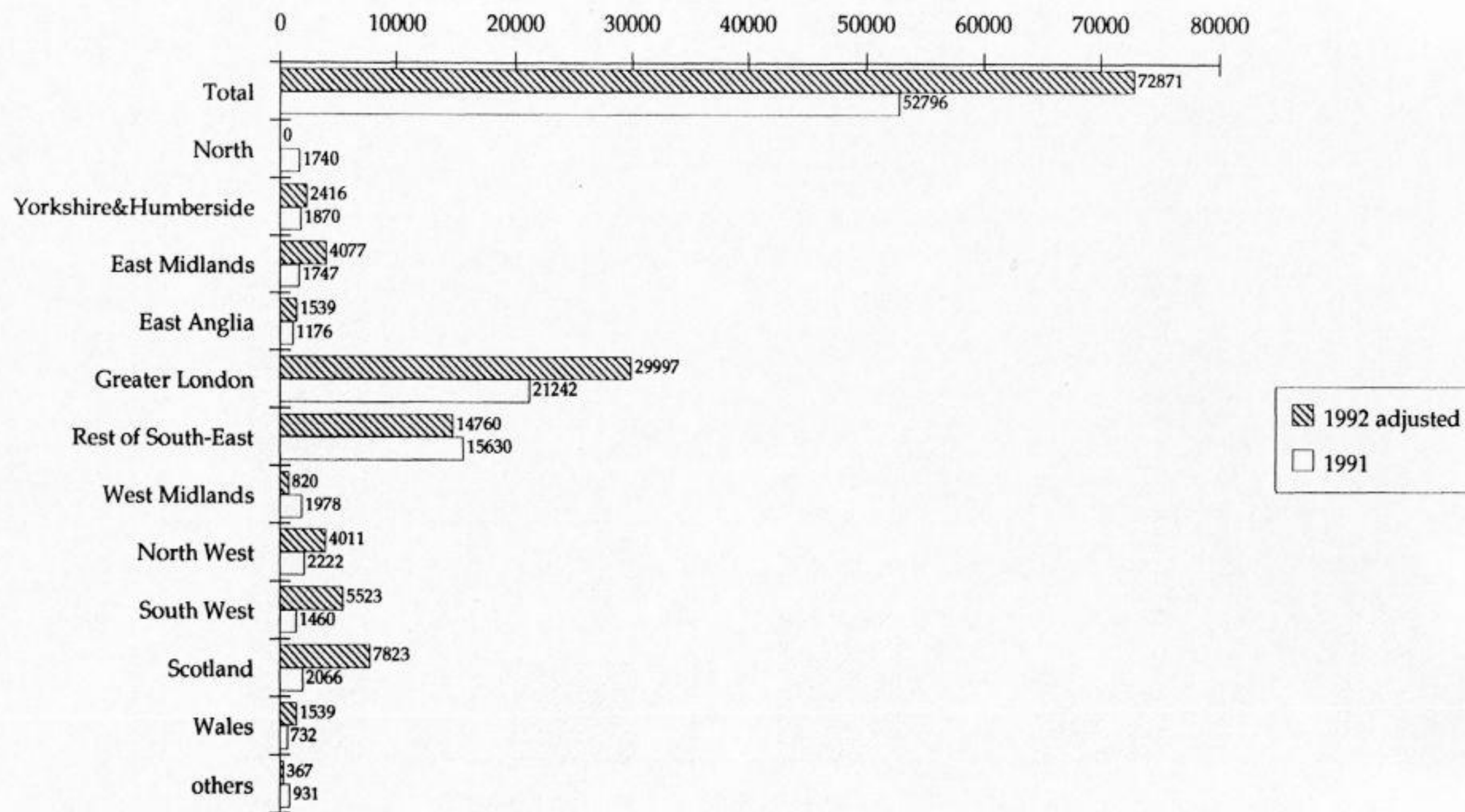
Table 8.3.
UK departures to Poland by region of residence 1991.

	Total	Business	Leisure	VFR	Misc	Other
Total	52,796	24,890	12,476	13,722	1,309	399
North	1,740	759	747	235	0	0
Yorkshire&Humberside	1,870	625	275	971	0	0
East Midlands	1,747	694	786	266	0	0
East Anglia	1,176	767	409	0	0	0
Greater London	21,242	9,048	5,436	6,359	0	399
Rest of South-East	15,630	9,460	2,049	3,089	1,031	0
West Midlands	1,978	625	216	1,138	0	0
North West	2,222	639	1,111	471	0	0
South West	1,460	910	550	0	0	0
Scotland	2,066	468	896	702	0	0
Wales	732	457	0	275	0	0
others	931	438	0	216	278	0

These estimations are based on interviews with passengers as they leave and return to the UK. The tables are classified by flow and purpose of travel. UK residents are also classified by region of residence.

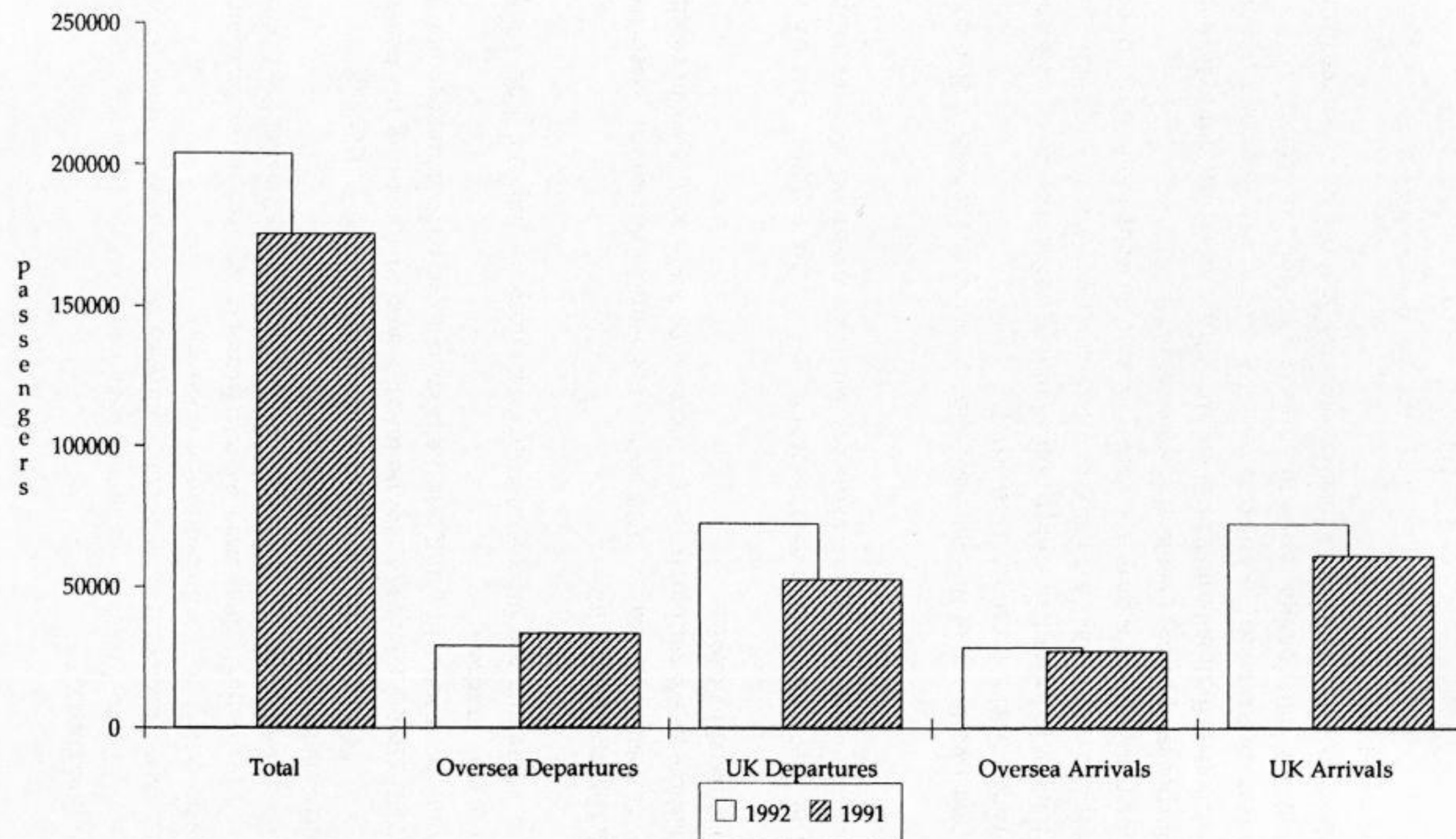
source: *International Passenger Survey*,
(Data obtained from The Department of Transport)

Departures to Poland 1991 compared to 1992 (adjusted)



passengers

Air traffic to and from Poland 1991 and 1992 (adjusted)



MARKET SITUATION - UK

1. The Policy.

" The British government's lead in creating a more competitive air travel market is now being followed by European Commission's planned air traffic liberalisation measures.

If implemented, these may help to increase services to regional airports, which will become increasingly attractive to travellers as the London airports become more congested.

"The development of regional airports into significant international gateways will be instrumental in spreading the benefits of tourism around England and help areas to assume stronger identities in tourism markets."

in: " *Planning for Success*". *A tourism strategy for England 1991-1995* (p.17).

2. General situation.

WTO estimates that in 1992 volume of world tourism increased from 455 million to 476 mill arrivals, an increase of 4.5%, and tourism receipts increased by 6.8%.

The latest information available from IPS for 1992 suggests that UK residents made 33.3 mill visits abroad, an increase of 10% on the previous year.

Over two thirds of the increased UK outward traffic was to five countries: France, Spain, Portugal, USA, Italy.

Holiday independent and package holiday traffic was up by 12% and 17% respectively in the last three quarters analysed (4'91+1'92+2'92).

Business and VFR grew by about 5% and miscellaneous visits (medical purposes, sporting events etc) were by 14%.

Estimated figures issued by BAA show the increase in domestic and international traffic at airports of 10.6% on the previous year (this refers to both UK and foreign residents travelling in both directions).

Heathrow and Gatwick which account for 85% of all passenger traffic were up by 11.7%.

source: *TOURISM INTELLIGENCE*

QUARTERLY, Vol 14 No 3, Feb 1993.

3. Comments to the tables.

- The figures shown on Table 1 for the 1st half of 1992 compared to those for 1st half of 1991 are considerably higher. Total number of overseas travels rose by 16%, whereas volume of expenditures as well as number of travels to Eastern Europe rose by 18%.

The highest growth is shown for travels by air (22%).

- Vast majority of international passengers is servicing by London Airports. Similarly, Warsaw Airport has great share of traffic from UK.

- London residents generate great deal of business flights to Europe, however position of South is not bad with share of 17% and index =150.

- In 1991 39 % of South East population and 37 % of South West went for holiday abroad , compared with 47% of Londoners.

- Trying to compare figures for 1992 with those for 1991, a hypothetical estimation was made. The traffic for three quarters 1992 was multiplied by 4/3 to obtain numbers for the whole year.

If it is correct, we would see growth in total departures to Poland from the level 52,796 passengers up to about 72,000.

- The most important growth was noted among Great London, Scotland and South West residents. (see - charts attached)

As far as particular purposes of travel are concerned, that sort of estimations is too risky, because of seasonability of travel types.

- What can be said is as follows:

Greater London residents generate 41.2% of total departures to Poland in 1992, rest of South-East - 20%, and South-West - 7.6%.

In respect to business travels, the Londoners' share is not so high - 32.3%, whereas South East has nearly the same - 29.7%, and South West has 8.1%.

Generally, the share of business travels seems to fell down in 1992, contrary to VFR, which rose.

4. Economy outlook.

The recession is deep and long and there are forecasts that recovery will go rather slowly. Overall GDP fell by 0.5% from 1991.

A key element for overseas tourism is the value of the pound abroad. *EIU Travel and Tourism Analyst* (no 6, 1992) points out that following the sharp effective devaluation (departure from the ERM) - "most travellers will find that their money buys perhaps no more than 80% of what it did a few months ago".

At this moment only hope is that British inflation is below the average in Europe. The rate of inflation was 2.6% in December 92 and further fell in the first months 1993 (even to 1.3% in April), but is likely to rise a bit during the rest of the year.

The unemployment rate is still very high (about 10.5% of the workforce). UK economy is expected to grow by about 1.5% in 93 and by 2.5% in 94. Unemployment is rather to remain about 3 mill.

5. The prospects.

In "*THE UK TOURIST OUTBOUND .A MARKET PROFILE 1991*" the following trends and prospects of British overseas tourism are pointed:

- Independent holidays continue in popularity;
- Environmental concerns have an influence on decisions where to go;
- Diversification away from peak seasons;
- Increase in second and third holidays;
- Most growth in foreign holidays is expected;
- Eastern Europe - are the new destinations;
- Ageing population;

Travel and Tourism Editor, EIU Mr Graham Todd said that travel industry may be seriously affected by:

- little growth in personal disposal income
- savings and borrowing both went down
- EIU research suggests people feel their savings are too low.

A wider sense of job insecurity restrains consumption and encourages savings. While the number of trips taken may hold up, nights away and spending will fall.

Lester Porter - from Thomas Cook said:

"When times are hard, the summer holiday takes priority."

TIQ forecasts of British residents' tourism are that in 1996 will be 38.0% mill visits overseas (% change 96/91 = 25) and spending at current prices will be £15475m (% change 96/91 = 58).

Chapter II. TO POLAND

Table1. Arrivals from top 10 countries (acc. to order 1992)

	1989	1991	1992	growth '92/'91
	(thousands)			
Germany	1844.4	20885.4	30687.7	47%
Czecho-Slovakia	1502.6	6101.9	8257.6	35%
former USRR	2899.1	7545.5	7788.8	3%
Romania	18.8	275.9	208.9	-24%
Austria	75.5	133.2	192.8	45%
Hungary	698.5	179.9	187.3	4%
France	74.8	196.9	181.4	-8%
Netherland	56.1	159.4	178.9	12%
Sweden	115.2	143.6	158.8	11%
UK	46.6	84.6	145.5	72%
All countries	8233	36846	48989	33%

source: GUS (Polish Central Statistical Office)

The number of arrivals from abroad to Poland has dramatically risen since 1989. The growth is coming mostly from neighbours: Germany, former USRR and Czech & Slovakia.

In 1992 we also can see considerably growth from UK.

As a result, UK has its place among top ten countries generating tourism to Poland. This is the first time in history.

Table 2. Arrivals from UK (by quarters of 1992 and 1993)
(thousands)

<u>1 Q / 92</u>	<u>2 Q / 92</u>	<u>3 Q / 92</u>	<u>4 Q / 92</u>	<u>1 Q / 93</u>
11.7	22.1	38.4	73.3	16.9

The rapid growth of arrivals from UK during 1992 is rather surprising and hard to be explained at this moment.

However, what is worth stressing is that the figure for first quarter of 1993 is higher than this for firth quarter of 1992 by 44 %.

The following information presents the most important results of the survey carried out by the Warsaw Institute of Tourism; it refers to the aims, motives and organisation of arrivals to Poland in 1992. The sample of over 8000 foreigners leaving Poland after having their visit to the country, answered the questionnaire. Our surveys indicate that foreign visitors usually stay in Poland for a short time. The average is in the summer 4 nights, whereas in the rest of the year - about 2.5 nights. Most of Germans and Czechs&Slovaks stay in Poland one day without night (55 - 80 % of them, depending on season). The question arises how much of total visitors number are tourists? According to Institute of Tourism's estimations we had had in 1991 about 11 mill, and in 1992 about 13.5 mill international tourist arrivals, which is respectively, slightly above or slightly under 30% of total arrivals. Increasing trend of arrivals numbers seems to be stopped. So, for the year 1993 no serious changes are expected.

Tables below are for all visitors from UK to Poland staying in Poland at least one night in 1992, compared with other West-European tourists. West-European tourists in Poland (German market, as totally different, is excluded).

Table 3. Tourist from UK compared to tourists from other West European countries.

	W. EUR	UK
base:	531	142
	%	%
<i>Length of stay</i>	W. EUR	UK
1 - 2 nights	24	24
3 - 4	26	28
5 - 14	40	37
over 15	10	11
<i>Average length of stay</i> (nights)	W. EUR	UK
	8.9	9.7
<i>Regions visited.</i>	W. EUR	UK
Seaside	37	18
Lakelands	7	7
Central Poland	50	68
Highlands/mountains	14	15
Silesia	12	27
other	7	4

<i>Purposes of trip to Poland</i>	W. EUR	UK
visiting friends/relatives	32	19
visiting place/country of origin	17	8
getting to know the country, culture	18	26
religion, pilgrimage etc	6	6
holidays & leisure	22	10
shopping	8	4
business	36	31
exhibitions, congresses	6	4
professional interest tours	6	15
hobby (special interest trips)	3	5
other	11	17

<i>What was criticised?</i>	W. EUR	UK
cost of stay	7	17
far troublesome way	13	25
difficulties in organizing the trip	3	6
limited tourism attractiveness	5	2
information	15	15
quality of tourist services	23	25
level of sanitary facilities	31	32
other	9	9
no answers (= no complains)	36	20

<i>Organisation of the trip</i>	W. EUR	UK
group organized by a travel agency	7	4
individual / through travel agency	11	14
individual on private invitation	25	12
by invitation of host institution	14	18
individual arrival only	41	51
no answers	2	1

<i>Activities</i>	W. EUR	UK
stay in the towns	52	59
stay in mountains	3	2
seaside holidays	1	0
forest/lakes holiday	1	0
stay in the countryside	5	4
route around the country	14	10
other	12	15
no answers	13	9

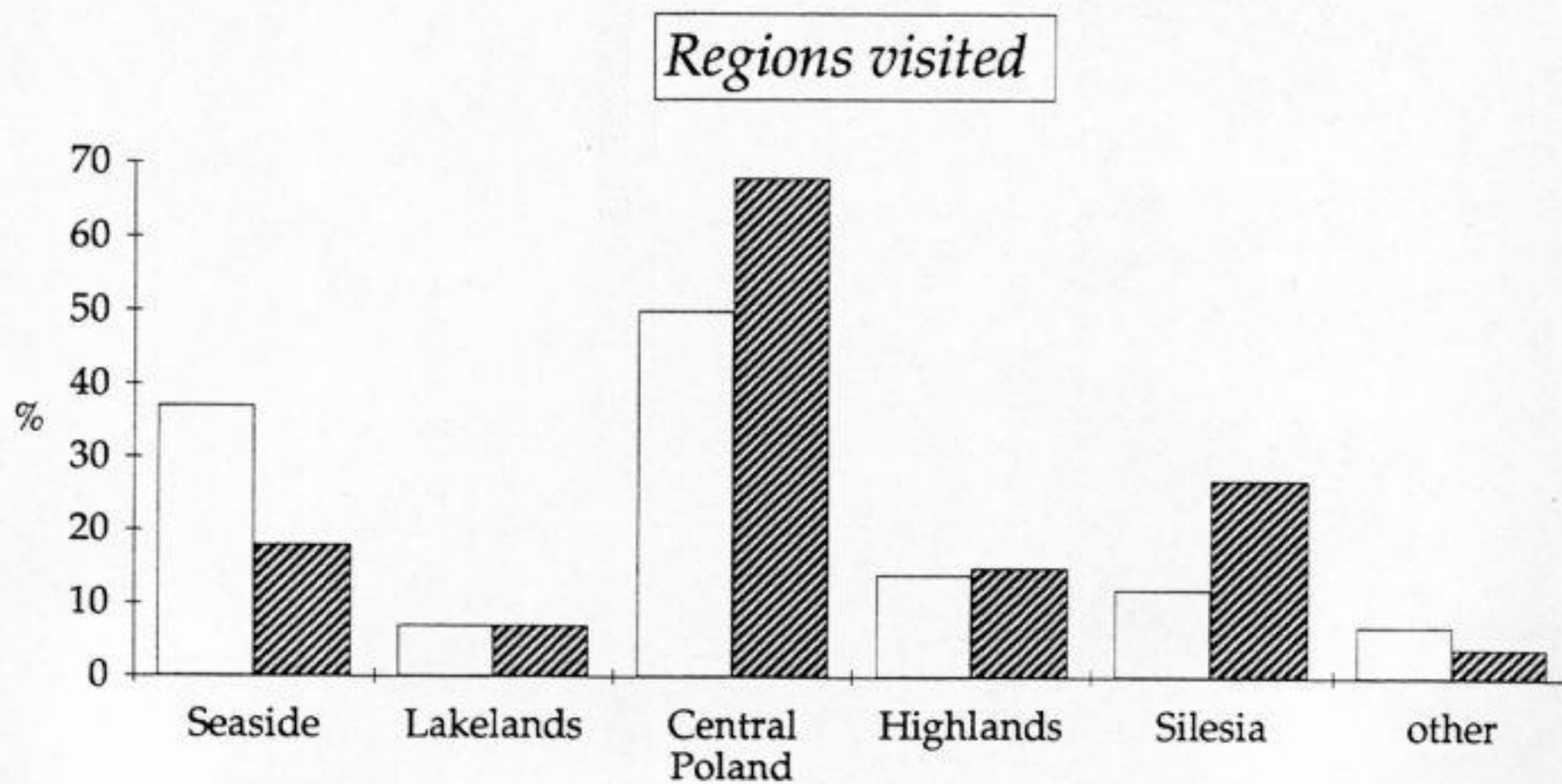
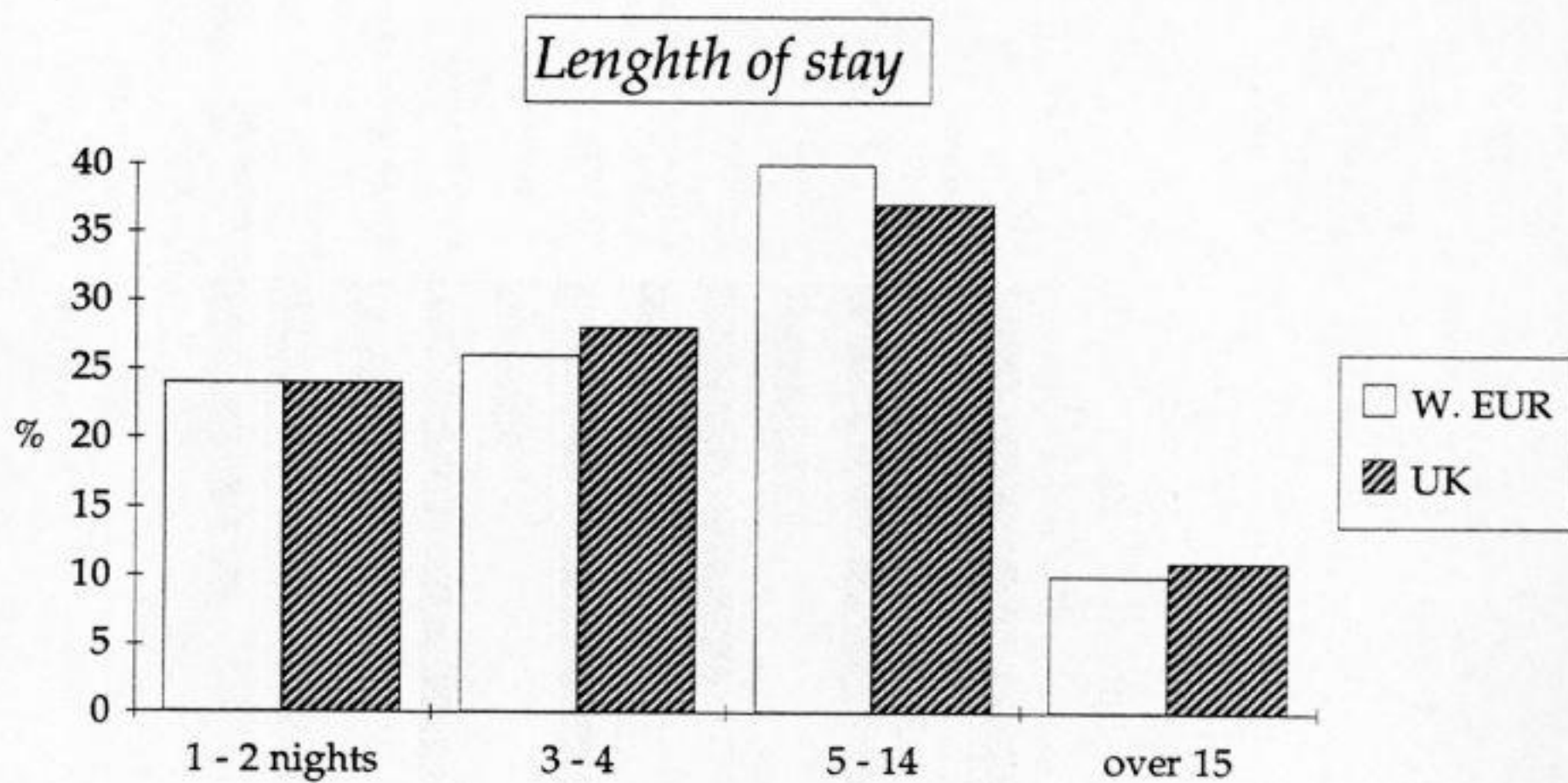
<i>Accommodation used (mainly)</i>	W. EUR	UK
hotel, motel etc.	48	58
camp site	5	3
rented room/B&B	13	8
friends/relatives	23	13
other	4	9
no answers	7	9
no	6	8
don't know & no answers	8	11

<i>Mode of transport used to travel</i>	W. EUR	UK
air	31	46
car	30	34
track/van etc.	5	6
train	5	4
ferry	23	4
coach	4	6
no answers	2	1

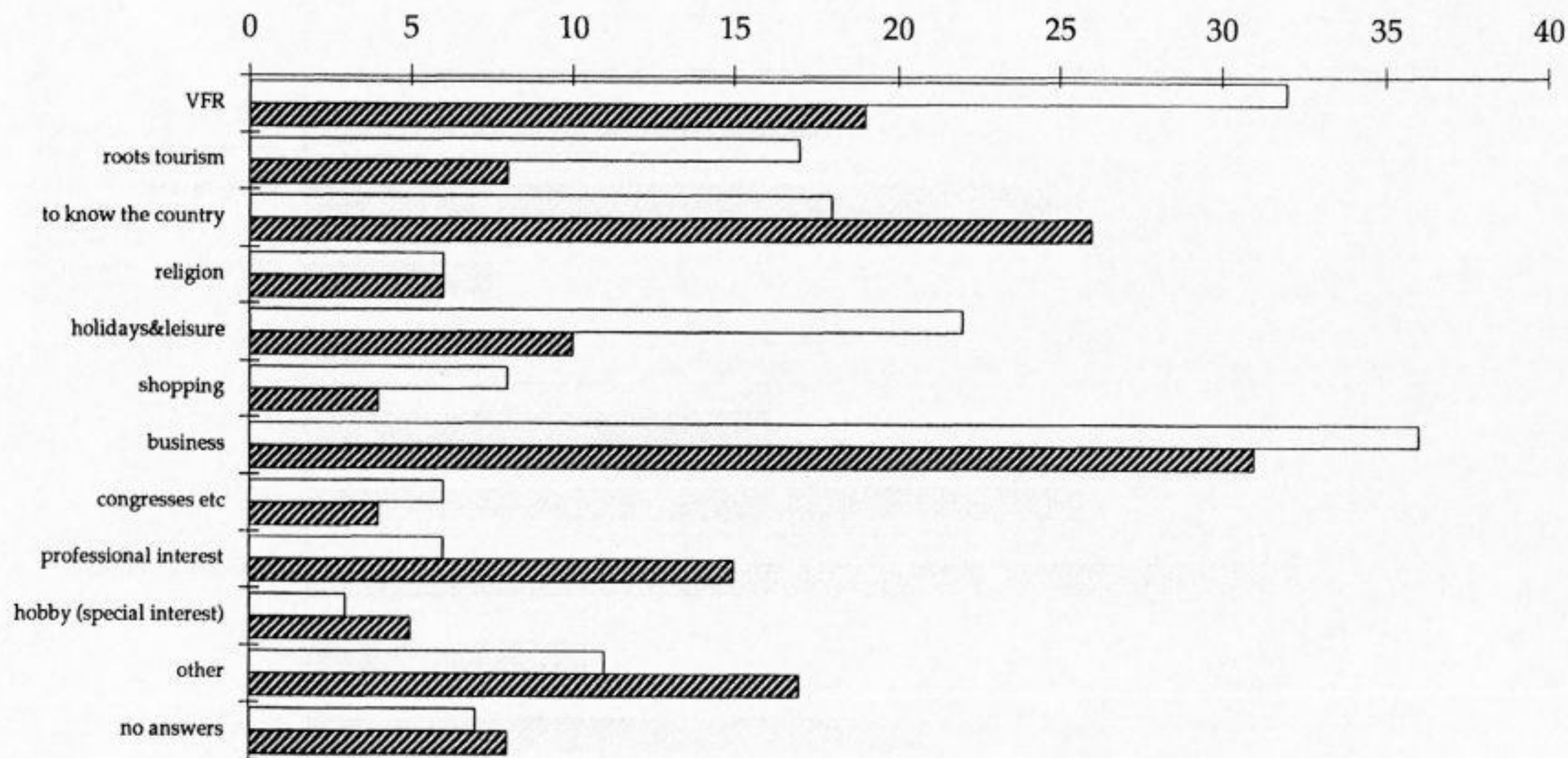
<i>Previous visits</i>	W. EUR	UK
the first	30	40
the second	17	20
third	14	8
fourth or more	38	30
no answers	1	1

<i>Demografic profile</i>	W. EUR	UK
Women	28	30
Men	71	67
no answers	1	3

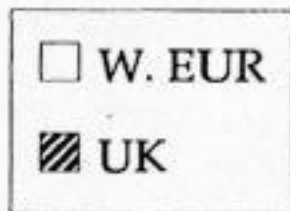
<i>Age groups</i>	W. EUR	UK
15 - 24 years	7	11
25-34	27	24
35-44	38	35
45-54	18	20
55-64	8	7
65+	2	2
no answers	1	2



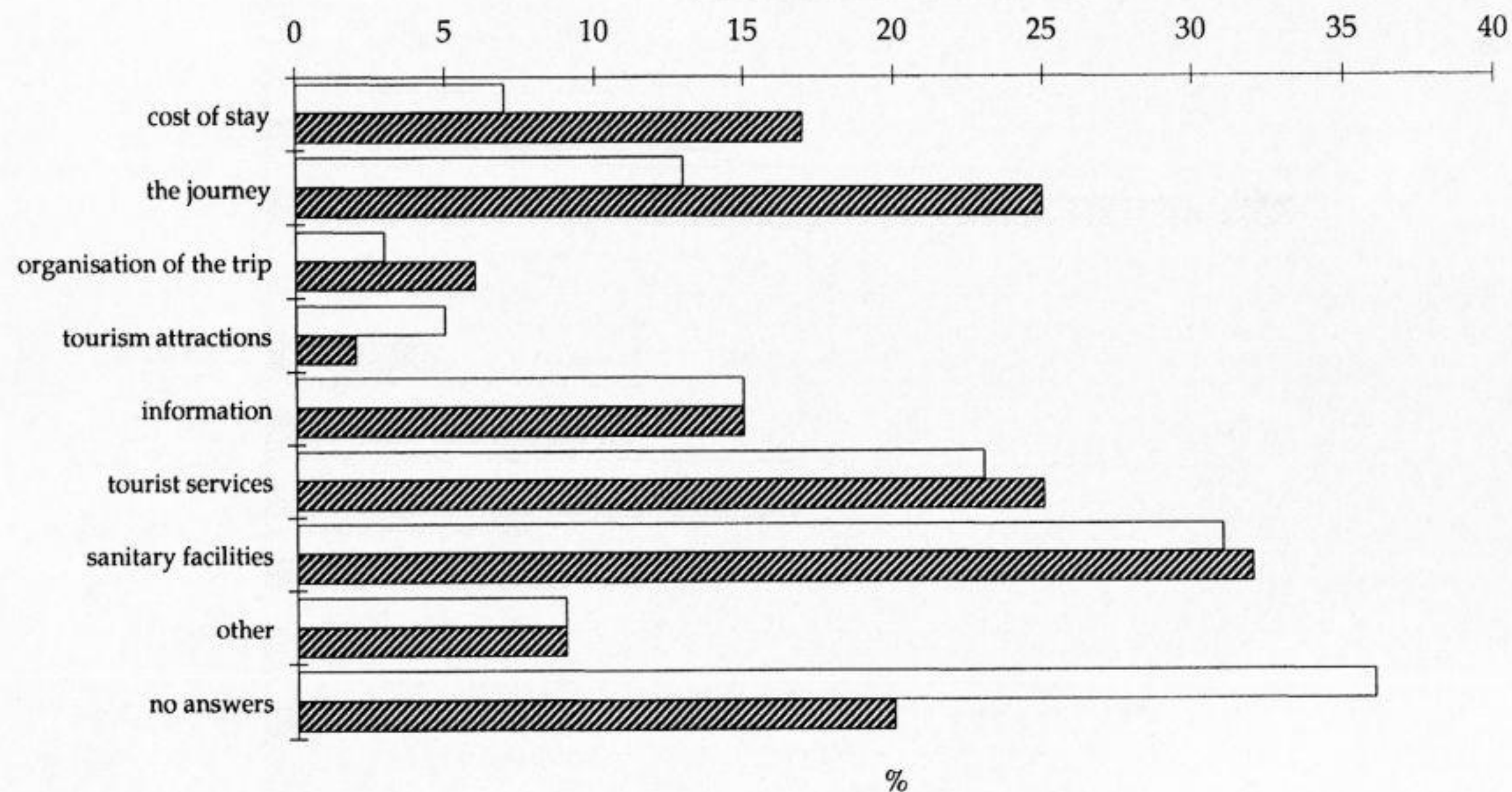
Purposes of visit



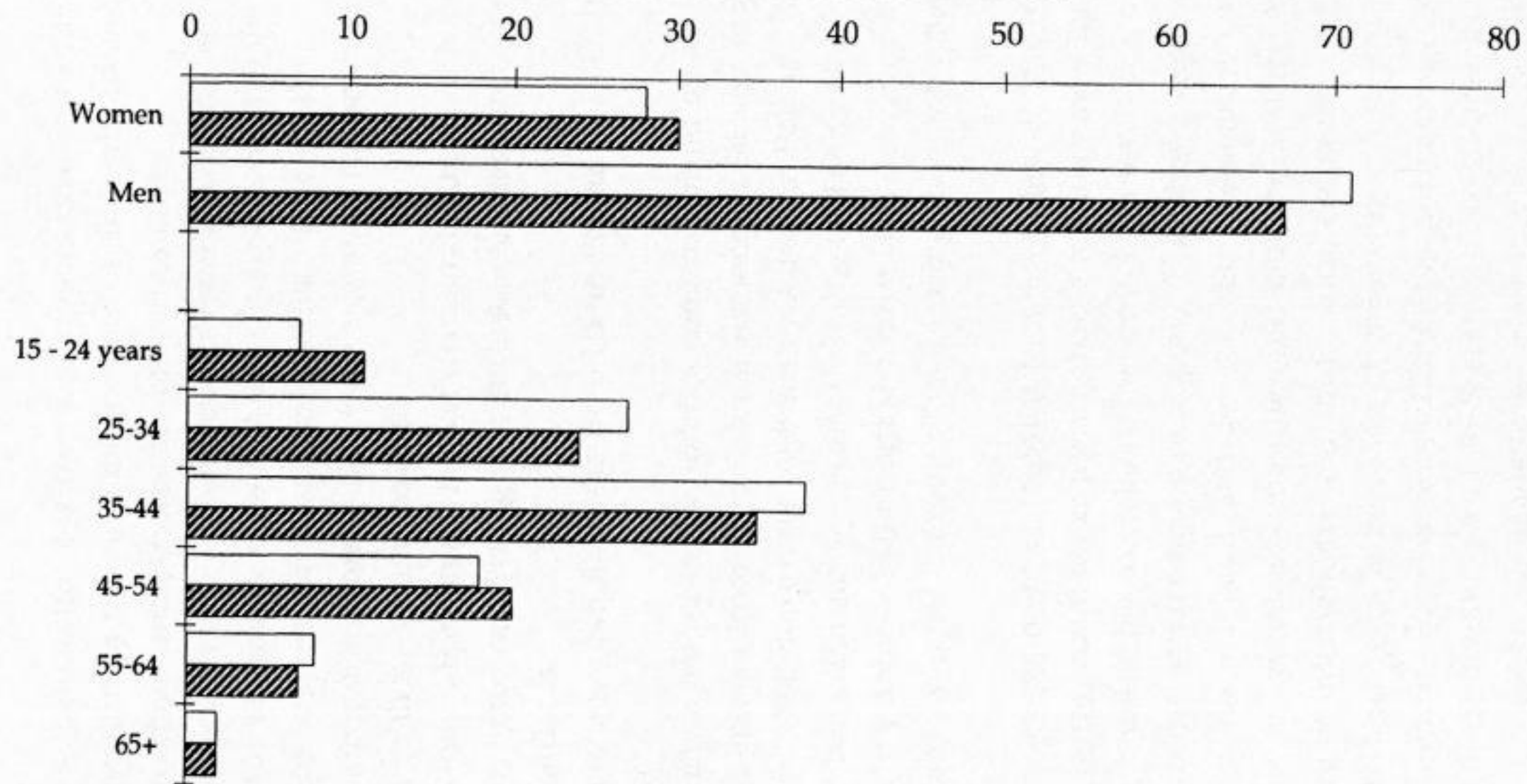
%



What was criticized



Demographic Profile



□ W. EUR
 ▨ UK

MARKET SITUATION - POLAND.

1. The data and survey results shown above, can be summarised as follows:

- Very high numbers of one-day trippers (that is mainly shoppers) to Poland constitute a big potential for tourism industry provided relevant tourist attractions and services are offered to them.
- The same is true for business travellers from Western Europe. They usually stay in big cities and this could be accompanied with short leisure trips to sport, landscape or historical attractions.
- Number of visitors to lake/sea/mountain regions is too low compared to those visiting towns.
- Holiday/short breaks market to natural attractions is to be developed, based on existing tourist facilities, after some improvement of service standards.
- There were 145,500 visits from UK to Poland in 1992. It is relatively big market.
- Nearly a half of British tourists come to Poland by air. Adjusted numbers from International Passengers Survey suggest that there were 72,800 departures by British residents to Poland. This is supported by Polish survey results (Institute of Tourism)
- Slightly above a half of British tourist is in age group 35-54 years.
- Relatively small is group of those using travel agencies' services.

2. The development of regional tourism potential into significant economic factor could act as a springboard for other local industries.

There is a remarkable correlation between high levels of unemployment and high tourist attractiveness of regions. That shows weakness of economy on the one hand, and development possibilities on the other.

- Both Polish tourist authorities and tourism industry are aware of an importance of international tourism for local economy.

Local authorities seem to be aware of benefits from tourism too, however are too dependant on governmental funds and sometimes fail to encourage local initiatives and co-operate with local business.

- Serious efforts are made to improve tourism information and promotion of the country and particular regions.

The quality of new promotional brochures is very high, but distribution/dissemination of them is insufficient and not properly targeted.

Chapter III. Polish Air Travel Industry

There are two main companies responsible for Polish Civil Aviation:
Polskie Linie Lotnicze LOT (Polish Airlines),
Panstwowe Porty Lotnicze PPL (Polish Airports).

Table 1.

LOT Network

	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1 half 1992</u>
1. Length (thous. km)	135.0	116.6	109.0	no data
a) foreign	130.5	114.6	107.9	no data
b) domestic	4.5	2.0	1.1	no data
2. Number of countries	36	33	33	33
3. Number of cities	60	59	47	62
a) foreign	49	52	43	54
b) domestic	11	7	4	8

LOT has had bad results since 1990.

Although sales in 1991 were \$344.7m (22.4% increase compared 1990),
but in the same time net loses were \$43.1m.

This was due to:

* huge investments (change to western aircraft, participation in the new Warsaw airport and modernisation of some regional airports - on the one hand;
and on the other :

* inceasing tickets prices, pushed up by polish currency reform (international dollar convertibility of zloty),

- as a result some customers shifted into coach travels;

* decline of demand in neighbour markets;

* increasing costs, resulting from so called "deregulation of prices", which means simply making prices more realistic;

* the challenge of international competition, and insufficient means of coping with it, (Polish air travel market became open for foreign airlines and some say that too open). However, Polish air-travel industry is trying to find its place on the market and cooperative relationships are being built up with Western airlines.

New links were opened to new post-Soviet Republics:

Warsaw - Vilnius, Kiev, Lvov, Minsk, Riga.

It is also looking at South America, African and Israel routes.

The most international links operated by LOT is to: Germany (39 a week), USA (20), France (16) and UK (14 to London, 1 to Manchester) .

Table 2.

Passengers on Polish Airports, years 1990 - 1st half of 1992.
(thousands)

	<u>1988</u>	<u>TOTAL</u> <u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1st</u> <u>half'92</u>
total	2704	3208	2711	2033	958.5
Polish Airlines LOT	2018	2305	1715	1208	552.5
inc. foreign destin.	1591	1888	1488	1109	500.6
inc. domestic flights	427	417	227	99	51.9
foreign airlines	686	903	996	825	405.9
foreign airlines' share	25.4%	28.1%	36.7%	40.6%	42.3%

source: ZOFIA LUBOWICZ, "SIEC POLACZEN LOTNICZYCH POLSKI Z INNYMI KRAJAMI. PASAZERSKI RUCH LOTNICZY.
(The network of air links between Poland and other countries. Air Travels).
INSTITUTE OF TOURISM, WARSAW 1992 (unpublished report).

Table 3.

Passengers by Airport, years 1990 - 1st half of 1992.
(thousands)

	W A R S A W			G D A N S K		
	<u>1990</u>	<u>1991</u>	<u>1st half'92</u>	<u>1990</u>	<u>1991</u>	<u>1st half'92</u>
total	2675.9	1981.1	903.3	118.3	77.6	40.2
Polish Airlines LOT	1637.2	1134.9	511.7	94.3	67.9	35.0
inc. foreign destin.	1412.6	1035.9	460.3	32.9	26.5	14.5
foreign airlines	1038.7	846.2	391.6	24.0	9.7	5.2
foreign airlines' share	38.8%	42.7%	43.4%	20.3%	12.5%	12.9%
	K R A K O W			K A T O W I C E		
	<u>1990</u>	<u>1991</u>	<u>1st half'92</u>	<u>1990</u>	<u>1991</u>	<u>1st half'92</u>
total	86.4	58.6	27.2	4.4	5.4	1.9
Polish Airlines LOT	68.1	48.3	23.9	3.5	1.1	0
inc. foreign dest.	38.8	42.1	23.3	0.2	1.1	0
foreign airlines	18.2	10.3	3.3	0.9	4.3	1.9
foreign airlines' share	21.1%	17.6%	12.1%	20.5%	79.6%	100.0%
	P O Z N A N			S Z C Z E C I N		
	<u>1990</u>	<u>1991</u>	<u>1st half'92</u>	<u>1990</u>	<u>1991</u>	<u>1st half'92</u>
total	20.8	16	7.7	19.3	4.3	4.8
Polish Airlines LOT	11.2	5.9	4.7	18.9	3.5	4.3
inc. foreign dest.	1.7	1.3	0.5	0.5	0.6	0
foreign airlines	9.6	10.1	3	0.4	0.8	0.5
foreign airlines' share	46.2%	63.1%	39.0%	2.1%	18.6%	10.4%
	W R O C L A W			O T H E R		
	<u>1990</u>	<u>1991</u>	<u>1st half'92</u>	<u>1990</u>	<u>1991</u>	<u>1st half'92</u>
total	62.6	37.8	19.6	46.8	7.0	4.4
Polish Airlines LOT	62.5	37.6	19.4	46.5	6.7	4.3
inc. foreign destin.	0.4	0.0	0.0	0.2		
foreign airlines	0.1	0.2	0.2	0.3	0.3	0.1
foreign airlines' share	0.2%	0.5%	1.0%	0.6%	4.3%	2.3%

source: as above

In 1990 twenty foreign airlines serviced traffic from and to Poland. The first position is occupied by LUFTHANSA (the most growth and most passengers); good results on Polish market had British Airways and SAS.

table 4.

SCHEDULED FLIGHTS OPERATED BY FOREIGN AIRLINES
TO AND FROM POLAND.

<u>Airline</u>	<u>flights/ week</u>	<u>passengers</u> <u>1990</u>	<u>passengers</u> <u>1991</u>
LUFTHANSA	25	120300	154000
AEROFLOT	15	144000	128600
BRITISH AIRWAYS	14	78400	87700
SAS	7	42300	61660
AUSTRIAN AIRLINES	7	44300	47580
SWISSAIR	7	42500	46500
KLM	6	32400	43200
AIR FRANCE	3	34300	38330
DELTA	7	66800	28400
MALEV	1	63900	23200

source: as above

table 5.

FORECAST OF AIR TRAFFIC AND AIRCRAFT MOVEMENTS IN POLAND.

	<u>1990</u>	<u>1995</u>	<u>2000</u>	<u>2005</u>
Passengers (mill)	2.7	3.0	4.0	5.5
Aircraft movements (thous)	121	140	171	213
- including transit	43	56	63	71

American consulting company **Engineering and Economics Research System Corporation** (EER) prepared in Jan 1992 a document : *General Development and Investment Plan for Polish Civil Aviation*.

In this document is pointed out that during nearest 15 years will not occur at Polish airports problems of congestion.

The airports are evaluated as rather well equipped establishments of good development potential, which can be better utilised in future after some modernisation.

Considering the localisation of airports : (in respect of country frontiers, big cities, trade and tourist centres) and with regard to expected demand, it is assumed that Poland can be divided into seven areas of "airport impact" (see maps attached), and Polish airports network should consist of eight units:

1. International:

- Warsaw, Krakow, Gdansk.

2. Regional:

- Szczecin, Poznan, Wroclaw, Katowice, Rzeszow.

Those regional could serve as reserve for international airports.

Now four of Polish airports maintain permanent international links (Warszawa, Gdansk, Krakow and Szczecin). In addition, Poznan services charter flights and links via Warszawa, and Wroclaw is just beginning with flights to Germany.

The only international airport with full infrastructure and a range of facilities is Okecie (Warszawa), which services 90% international flow.

The others can service main types of aircraft but facilities servicing passengers are rather undeveloped. Serious efforts are being undertaken for improving this situation.

For the purpose of this report four airports are considered and described in more details.

These are:

Warsaw, Krakow, Gdansk and Poznan.

1. Name of Airport: Warszawa, MDL Okecie (WAW).

(The new international airport built in 1992 is designed for handling 3 - 5 mln passangers annually).

1.1. Details of frequencies and principal international destinations served.

Frequency:

year 1990 - 2.7 mln passengers, including 2.45 mln international.

1991 - 2.0 " " " 1.9 "

1.2. Facilities available at the airport:

a) aircraft maintenance fuelling: yes.

b) level of airtraffic control :ILS.

c) passenger facilities:

(1) duty free: yes;

(2) place to eat & drink: restaurant, cafe, drink bar;

(3) information: tourist information;

(4) services: desks of main airways companies,

rent a car (Budget, Avis, Orbis), tour agencies (Orbis, Air Tours).

1.3. Capacity of Airport:

a) day and night operation: yes.

b) seasonal variation: in winter 30% links less.

c) number of terminals & runways:

terminals - 2 ,runways - 2 (each 3690 * 60 m).

d) ability to handle large aircraft: Boeing 747.

2. Name of Airport: Gdansk,Rebiechowo (GDN).

2.1. Details of frequencies and principal international destinations served.

Frequency: 118 000 passengers, including 57 000 international (1990 year)

78 000 " " 37 000 " (1991 year).

Main destinations: Hamburg (6 times a week), Helsinki (1 - in season), London (2 - in season), Leningrad (1), Warsaw (3 times a day).

2.2. Facilities available at the airport:

- a) aircraft maintenance fuelling: yes.
- b) level of airtraffic control: ILS.
- c) passenger facilities:
 - (1) duty free: no;
 - (2) place to eat & drink: cafeteria, drink bar;
 - (3) tourist information;

2.3. Capacity of Airport

- a) day operation only;
- b) seasonal variation: out of season the flow less of 50%.
- c) terminals - 1; runways - 1 (2800 * 45 m);
- d) ability to handle large aircraft: Boeing 767.

3. Name of Airport: Krakow, Balice (KRK).

3.1. Details of frequencies and principal international destinations served.

Frequency: 86 000 passengers, including 58 000 international (1990),
59 000 " " 53 000 " (1991).

Main destinations: Cologne/Bonn, Frankfurt, London, Paris, Rome, Vienna,
and Warsaw (3 times a day).

3.2. Facilities available at the airport :

- a) aircraft maintenance fuelling: yes.
- b) level of airtraffic control: ILS.
- c) passenger facilities:
 - (1) duty free: no;
 - (2) place to eat & drink: cafeteria, drink bar.
 - (3) tourist information;

3.3. Capacity of Airport:

- a) day operation only;
- b) seasonal variation: out of season flow less of around 30%;
- c) terminals - 1 ; runways - 1 (2400 * 60 m);
- d) ability to handle large aircraft: Boeing 767.

4.Name of airport: Poznan, Lawica (POZ).

4.1. Details of frequencies and principal international destinations served.

Frequency: 21 000 passengers, including 11 500 international (1990),

16 000 " " 11 400 " (1991).

Main destinations: charter flights & links via Warsaw

4.2. Facilities available at the airport:

a) aircraft maintenance fuelling : yes;

b) level of airtraffic control: ILS;

c) passenger facilities:

(1) duty free: no;

(2) place to eat & drink: cafeteria;

(3) information: no;

4.3. Capacity of Airport:

a) day operation only;

b) seasonal variation :in winter 30% links less.

c) terminals - 1 ; runways - 1 (2504 * 50m);

d) ability to handle large aircraft: Boeing 767.

A glossary for maps.

map 1.

Obszary oddziaływania portow lotniczych = Airports impact areas,

Airports:

miedzynarodowe = international,

regionalne = regional,

drugorzędne = second class,

a) aircraft movements

b) emploment in the area,

c) number of inhabitants,

d) volume of goods and services retails.

map 2.

Porty lotnicze i obszary o promieniu 100 km = Airports and areas of 100 km around.

Polish population - 38.3 mill.

Airports:

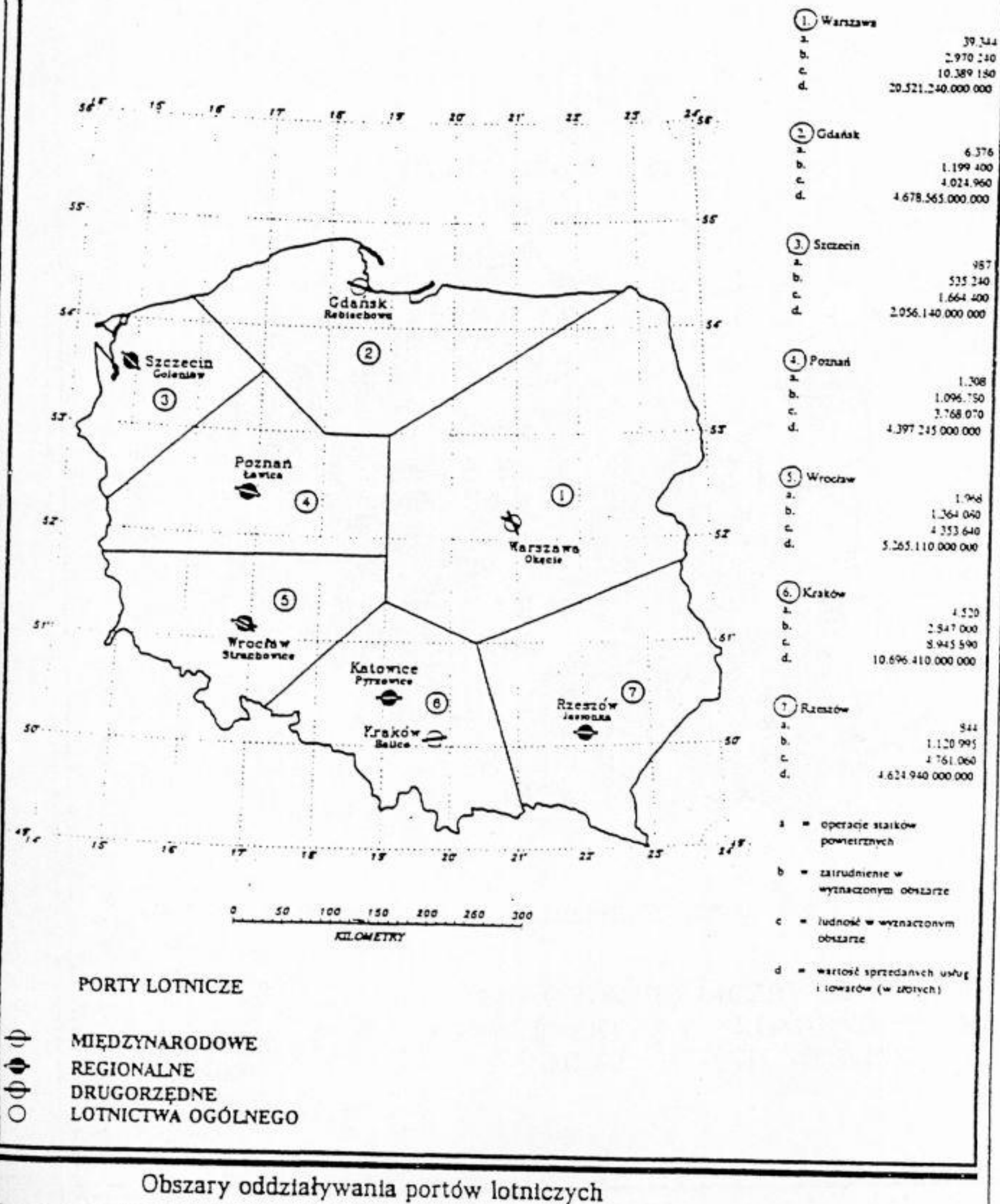
miedzynarodowe = international,

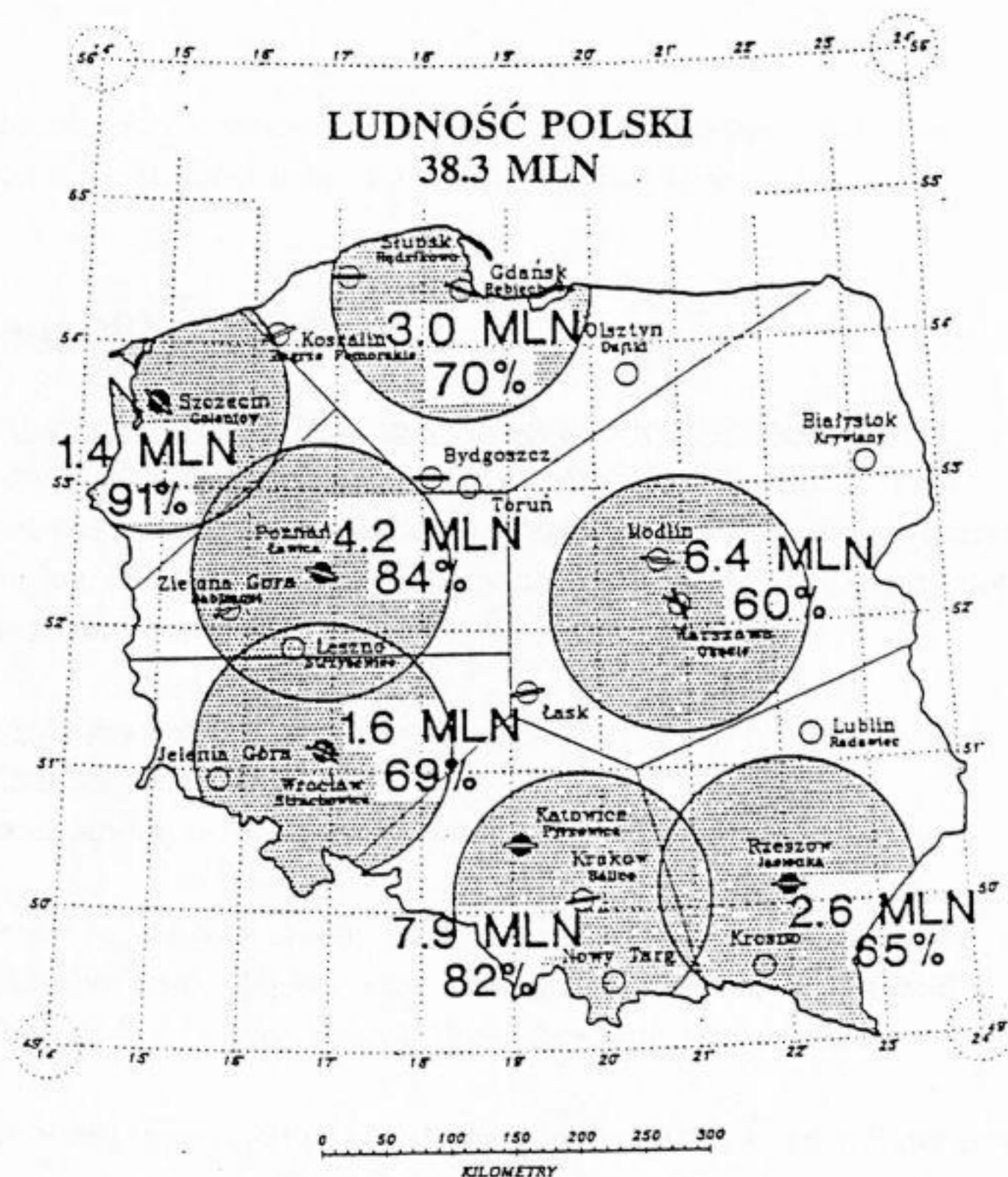
regionalne = regional,

drugorzędne = second class,

lotnictwa ogólnego = other airports.

71 % of population live in areas of up to 100 km from main airports.





PORTY LOTNICZE

- ⊕ MIĘDZYNARODOWE
- ⊖ REGIONALNE
- ⊙ DRUGORZĘDNE
- LOTNICTWA OGÓLNEGO

**71% OGÓLNEJ LICZBY LUDNOŚCI
ZAMIESZKUJE W PROMIENIU 100 km
OD GŁÓWNYCH LOTNISK**

Porty lotnicze i obszary o promieniu 100 km

Chapter IV. The Airports and Attractions.

Four polish airports : Warszawa, Gdansk, Krakow, Poznan and tourist attractions to be reached from them are described here.

1. Warszawa, MDL Okecie (WAW).

1.1. Location and distance from main cities and tourist destinations.

10 km from city of Warsaw. Links with all airports in Poland. Due to permanent bus service to rail station Warszawa Centralna and system of express trains, Okecie provides good connection with most of capitals of voivodships in Poland.

1.2. Natural attractions.

a) Lake Districts, Rivers.

Great Mazurian Lakes, Drawskie, Ilawskie, Olsztynskie and Suwalskie.

Very interesting are monuments of 19 century engineering art: Kanal (Canal) Augustowski, 100 km long, linking Wisla with Niemen, and Kanal Elblaski, 67 km long, linking Wisla Bay with Ilawa Lakes.

Especially worth mentioning is Biebrza, which constitute an unique route among huge marshes and wilderness with water birds living there.

b) Forest Areas. Large forest complexes which lie at lake regions:

Puszcza Augustowska etc. Mushrooms, wild fruits, berries and herbs may be gathered in the forests. Bialowieski National Park has its place in the World Biosphere Reserve List.

1.3. Heritage attractions.

- * The Warsaw Old Town - destroyed during World War II and carefully restored and rebuilt (UNESCO World Heritage List).
- * The Royal Castle in Warsaw, the seat of Polish kings from the 17th century. Destroyed (as the Old Town in its vicinity) and rebuilt during nineteen- seventies. It is now open for public and has a collection of arts.
- * Wilanow, a baroque palatio-park complex on the outskirts of Warsaw. It was the residence of King John II Sobieski. A branch of National Museum. In the former carriage house and menage is located Museum and Exhibition hall of Poster. The baroque garden and Anglo-Chinese park are available for strolls.
- * The Royal Lazienki - a vaste park with a palace "On the Water" and a number of Neoclassical buildings which used to serve as a residence of the last Polish king - Stanislaw August Poniatowski. Plays and music performances are put on in the amphitheater during the summer and Sunday piano concerts are given at the foot of the monument of Frederic Chopin.

Historical sites near Warsaw:

Zelazowa Wola - Frederic Chopin's born place.
Arcadia - romantic park and Nieborow 17 c. baroque palace;
Kazimierz Dolny - renaissance old town complex ;
Treblinka - museum of the martyrology of Warsaw Ghetto victims;
Sandomierz - old town complex;
Ciechocinek - health resort with long tradition; three unique graduation towers (1824-1859), saltworks;
Czestochowa - Pauline monastery, destination of a lot of pilgrimes, the "Black Madonna" painting, art collection at the monastery treasure;

2. Gdansk, Rebiechowo (GDN).

2.1. Location and distance from main cities and tourist destinations .

14 km from city of Gdansk;

a) City Air Terminal Gdansk, rail station Gdansk Główny: public bus (30 min), taxi ;

b) Ferry to Helsinki , Stockholm: taxi (45 min).

Nearby Baltic coast, at the largest seaside agglomeration called Trójmiasto (Gdansk, Sopot, Gdynia). Frombork (100 km), Kaszubian lakeland (30-50 km), Malbork (60km), Torun (185 km).

2.2. Natural attractions.

a) Sea and Sun .

The Polish Baltic coastline is about 520 km in length. The shore is for the most part sandy. The air has a large quantity of iodine. Bathing areas are marked by buoys and supervised by life guards. The best known seaside centers are: Ustronie Morskie, Leba, Jastrzebia Góra, Władysławowo, Jastarnia, Hel, Sopot and Krynica Morska.

* The Slowinski National Park, located near Leba (mobile sand dunes), is listed in the World Biosphere Reserve.

* Hel sand-bar - possible sea routes provided by cruise services;

* Wisła sand-bar and Wisła Bay and Elbląg Height;

b) Lakes and rivers.

* Kaszubian Lakes: Lake district and so called Kaszubian Switzerland;

* Lakes Charzykowskie and part of Bytów and Krajenski lake districts;

* Lakes Lebsko, Gardno;

2.3. Heritage attractions.

* Old Town in Gdansk, which was one of the Baltic greatest harbours, and one of three old Hansa towns in Poland (also Szczecin and Elblag). The most famous house there is Artus' Court.

* Malbork - large Castle of Teutonic Knights, excellent example of gothic defensive architecture.

* Grunwald - the field of the famous battle with Teutonic Knight (1410);

* Frombork - Copernicus museum, planetarium, Cathedral (14 c), bishop palace;

3. Krakow, Balice (KRK).

3.1. Location and distance from main cities and tourist destinations:

18 km from city of Krakow, the former capital of Poland;

a) City Terminal Krakow (bus service),

b) City Terminal Katowice (bus service),

Oswiecim - Auschwitz (road - 64 km, rail from Krakow Główny),

Zakopane, resort in Tatras (public bus, road - 120 km, rail),

Katowice, center of Silesian agglomeration (bus service - road: 80 km, rail from Krakow),

Wieliczka, old saltmining (30 km).

3.2. Natural attractions.

* Tatras mountains and Zakopane: in this town a range of tourist and holiday accommodation can be found. This is a starting point of many trails leading into mountains.

* Raft runs floated down a Dunajec River - through the Pieniny, a mountain belt next to the Tatras.

* Gory Swietokrzyskie, overgrown with forests, with wild areas with poles of rock rubble and numerous grottos and caves.

* Located near Kielce very beautiful Jaskinia Raj (Paradise) is adopted for public access and is great tourist attraction.

3.3. Heritage attractions.

* Old Town of Cracow - Poland's former capital. Remained unchanged through the ages. Has its place - together with old Jewish quarter, called Kazimierz - on UNESCO World Heritage List. Medieval huge market square, with his Cloth Hall, Town Hall Tower and many churches, burgher's houses. Near are buildings of one of the oldest European universities: Jagiellonian University. Everything surrounded by belt of vegetations, called Planty, where the old defensive walls stood.

* The Wawel in Cracow - the old seat of kings. Gothic and Renaissance castle with an arcaded courtyard. Now National Museum with old weapons, paintings and the famous tapestry collection as well as furniture and royal rooms.

* Oswiecim - museum of the martyrology on the grounds of the Nazi concentration camp (UNESCO World Heritage List);

* Wieliczka - museum of the saltworks: the history of salt mining, salt sculpture; (UNESCO World Heritage List); also alergical sanatorium;

* Lancot - an early-Baroque castle, music festival;

* Chocholow - village of traditional highlanders' wooden architecture;

* Sandomierz - old town complex;

* Zamosc - old town complex and defensive walls (16th - 17th c.);

* Krakow-Czestochowa Upland and Trail of "Eagle Nests"
(a number of castles);

4.Poznan. Lawica (POZ).

4.1. Location and distance from main cities and tourist destinations.

7 km from city of Poznan, center of international fairs.

4.2. Natural attractions.

Lagowski Lake district and Rzepin Forest;

Miedzychod-Sierakowski Lake district and Notec Forest;

Lake district and Drawski Forest;

4.3. Heritage attractions.

* Old town of Poznan.

* Palaces in Poznan and its environs (Kornik, Rogalin).

* In Gniezno - the capital of first Dukes of Piast dynasty - is Gothic Archicathedral of the Assumption of the Blessed Virgin Mary. The church contains remnants of the Romanesque structure. Original building was raised by Polish first historical king, Mieszko I prior to 977. Here took place first coronation of Polish king - Mieszko's son, Boleslaw Chrobry, in 1025.

* One of the largest and most magnificent Baroque monasterial complexes, formerly a Cisterial abbey, is in Lubiaz (near Wroclaw).

* Other important Cisterial abbeys are, among others in: Henrykow, Jedrzejow, Pelplin. They altogether constitute a part of European Cisterial Trail.

* Biskupin - archeological site : a fortified Lusatian settlement built at 700 - 400 B.C., situated on the island (now a peninsula);

Chapter V. Sport / Active Holidays

1. Water Sports

The two kinds of water sports are developed in Poland: kayaking and sailing. Windurfing is becoming popular as well as ice-boat sport. 118 water tourism trails (including 30 for sailing) are 11500 km in length. 15 trails are of international class:

Great Mazurian Lakes, Jeziora Iławskie, Jeziora Brodnickie.

a) Since fifty years the **kayak rallies** have well established tradition. The most common are 7 - 14 day long routes through small rivers of Northern Poland. Among most beautiful in Europe trails

for kayak rallies are mountain rivers: Dunajec, Poprad and San as well as going through forests and connected with lakes, such rivers as Brda, Czarna Hancza, Drawa, Krutynia, Pasleka, Radunia and Wda. Some kayak rallies are the events of international importance:

International Rally through Dunajec, taking place yearly, attracts some hundreds of participants from many countries.

Nevertheless, the kayak tourism potential of Poland is not widely known on international tourism market. To some extent, this is due to insufficient level and number of facilities (modern kayaks, car trailers for transportation, well equipped boat-houses or waterside hostels and complex services offered (boats, transportation in-route, accommodation, transportation out).

b) **Sailing.** Poland has not any sea yacht harbours. However some institutions and associations have at disposal sea-yachts succeeding in international competitions. Most typical places for sailing are lakes and the bays (Szczeciński and Wislany). The major yachtowners are Polish Sailing Association, Polish Yacht Club, National Defence League, Marine League, and the youth organizations, like Scouting, Polish Student Association, University Sports Association.

Training and sport centers for sailing are in Trzebiez (Szczecin Bay), Gdansk/Gdynia (Gdansk Bay), Wilkasy, Gizycko, Sztynort, Mikolajki (Great Mazurian Lakes) and Zegrzyn Bay (near Warszawa). Some water sports&tourism areas are of international importance:

Great Mazurian Lakes with lake Sniardwy (114 km²), Mamry lake (104 km²), Niegocin (26 km²). Worth promoting is Lake Wigry (22km²), that offers excellent accomodation base in the former Kamedulian monastery, lake Jeziorak near Ilawa and Ostroda towns and Wistula Bay. The latter would become the attractive sailing area after opening Krolewiec (Koenigsberg) region in Russia. Also man-made water resources like: Wloclawski (70km²), Solinski (21 km²) and Zegrzynski (33 km²) are good for sailing.

2. Winter Sports .

The best known winter sport (i.e. for skiing) centers are: in the Carpatians: Zakopane, Bukowina Tatrzańska (Tatras), Szczyrk, Brenna, Wisla, Korbielew (Beskides). In the Sudetes: Szklarska Poreba, Karpacz, Zieleniec.

Ski lifts (T-bars,J-bars, chair lifts, gondolas are for skiers use, but their number is insufficient. Particularly there is no extended systems of the lifts, so many slopes are unused as they could be. The best conditions for skiing are in Tatras, where unsolved conflict between needs of environmentalists and of skiers keeps the development of skiing facilities stopped. The same conflict can be seen in Bieszczady.

Analysis of the development possibilities shows that some prospects are near Klodzko (slopes of Sněžnik mountain) and at vicinities of Szczyrk and Korbielew (Pilsko mountain). Sites for more advanced, sport skiing are the two: Zakopane and Szczyrk. Ski-jumps (110m, 90m) and certified slalom and downhill slopes are there.

3. Walking/Climbing

3.1.Mountain hiking.

Since half of 19th century the travels into mountains became very popular. Nowadays, the mountain hiking is still the most common form of active tourism. This can be divided into two groups: a) stays in mountain resorts (Zakopane & vicinity in Tatras; Karpacz, Szklarska Poreba, Kudowa, Polanica, Duszniki in Sudetes; Wisla, Szczyrk, Szczawnica, Krynica in Beskides) and making one-day foot excursions; b)ten or more days long hiking through Bieszczady, Sudetes, Beskides.

Since a long time many trails are prepared for mountain hikers and a network of mountain shelters is established. Dangerous segments (in rocks) are equipped with safety gear such as chains and clamps.

The shelters are for the most part of the bad technical conditions and are getting worn out. Even the new small ones, called "bacowka", rapidly lose their original standard.

For the international tourism purpose the most attractive could be hiking through Bieszczady (wilderness and landscape) and Sudety. After relevant international agreements are signed and infrastructure improve, the mountain trail along the Polish-Czech border could become very important for international tourism.

Five National Parks (natural environment strict preservation areas) are located in mountains areas (the Karkonoski, Babiogorski, Tatrzański, Pieninski and Bieszczadzki), as well as four Landscape Parks (only for tourism and agricultural use).

3.2. Climbing.

Alpine-like mountainous belt: the Tatras provide interesting climbing opportunities. Not so good for record-seekers as in Alpes, but very good for training. Apart from Tatras climbing sites are also to be found in some parts of Sudetes (Karkonosze i Gory Sokole) and Jura Krakowsko-Czestochowska. Thus Poland can become a destination for beginners in climbing coming for training and improving their skills. It is worth to add, that Polish alpinists/himalayists are well valued in the world. Polish climber, Kukuczka was the second man in the world who reached all of eight-thousand peaks.

The speleology opportunities are also particularly worth promoting. Western Tatras have over 400 caves, altogether 60 km in length. Some of them, including the deepest one - Jaskinia Snieżna (the Snow Cave), and the longest one - Bandzioch Kominiarski (8.5 km long system of caves), are of international importance.

3.3. Cross-country hiking.

The most popular areas for the cross-country hiking are Lake Districts (Suwalsko-Augustowskie Masurian and Pomerian); large forest regions (Noteckie, Tucholskie Knyszynska, Dolnoslaskie, Solski Woods) , as well as regions with

many of historic attractions (among others: Silesian Castles and Trail of "Eagle Nests").

In this form of tourism mostly attend school youth, using as an accommodation the seasonal youth hostels (organized at schools, badly equipped with sanitary facilities) and tent fields. Due to underdeveloped tourist infrastructure and for lack of promotion of Poland - despite of many signed routes trails for cross-country hikers - the on-foot tourism at Polish lowland has no international importance yet.

4. Equestrian and other sports.

4.1.Horses.

Most of stud farms and horse-riding centres offer modern but often located in old palaces or manors accomodation, full board, expert instructors and indoor enclosure as well as riding grounds situated amidst lakes and forests.

So called "holiday in the saddle" are available in:

- * Bialy Bor -60 km south-east of Koszalin,
- * Racot, Sierakow Wielkopolski, Czerniejewo - province of Poznan,
- * Dlusko (holiday and horse riding centre situated on the Warta river),
- * Szczawno-Zdroj (health resort too) and the nearby
- * Ksiaz (accomodation in the castle) - Walbrzych province,
- * Budzistowo - 2.5 km from Kolobrzeg
- * Wojcieszow - at the foot if the Sudeten,
- * Lobez - near Szczecin,
- * Kadyny - at Elblag upland,
- * Drzonkow (also training centre for sportsmen), and
- * Raculka - both in Zielona Gora province.

The minimum stay in all riding centres is 5 days.

Worth mentioning cross-country horse rallies organized by riding centres are :

- * The Sudeten Rally (starts and ends at Szczawno-Zdroj),
- * The rally though the Kaszubian region (starts and ends at Wdzydze Kiszewskie).

Bloodstock sales are run by special trade agency ANIMEX. The best known site is Janow Podlaski.

4.2. Hunting.

There are 5200 hunter districts of average surface area about 5000 ha. Most of them are hold on lease by the Polish Hunters' Union. Some are not leased but assigned for foreign hunters use. The hunter districts owner are the National Forests and Agricultural Enterprises.

Numberous travel offices organize hunting for tourists. The most does it Hunting Agency of "ORBIS S.A" and - to the less extend - PEGROTOUR.

Some of Regional Boards of National Forests and also Polish Hunters, Union keep contacts with foreign agencies but as yet it is a margin of theirs activity. Poland's hunting areas are interesting mostly for almost natural animal habitats and opportunities of aquire attractive trophies of the chase. The main big game are: wild boar, stag, roe-deer; and more rarely: elk, aurochs, wolf. Among the smaller ones are fox, hare and birds. As far as hunting itself is concerned, the whole arrangements are all right. But income from hunting tourism could increase if the range of concurrent services widened.

It seems that hunting would become one of the the major tourism services for foreigners staying in Poland for buisness.

Main localizations for hunting tourism are in Pomorskie Lakeland (Tucholskie Woods) and Masurian Lakeland (the forests: Piski, Borecki, Augustowski) and the privinces of Gorzow and Zielona Gora.

4.3. Angling.

There is a few typical mountain rivers so the main angling areas lie in Lake Districts and rivers of Western Pomerania. The licences are provided by branche offices of Polish Anglers Association. None of tour agencies and a few holiday centres offer services for the anglers as yet.

4.4. Other, less developed.

Poland has a good chances for development of some kinds of the active, nature oriented tourism.

* Cycling/mountain cycling.

a) bike-touring throughout the countryside has traditions in Poland but is not very popular. Polish Society of Touring and Tourism has division of bike tourists and organize rides. Best places for cycling are in the lakelands (Kaszubian, Masurian) and the mountains (Beskidy and Karkonosze). As a central sites for bike excursions would be used, respectively: Kartuzy, Mikolajki, Wisla, Karpacz.

Worth promoting is also mixed form of sightseeing of natural attraction areas: by coach&bike.

b) mountain bikes are becoming popular in Poland. Zakopane and Karpacz are to be recommended for this kind of sport. There are mountain bike rental in both of this sites.

* Fotosafari - arranged by Foreign Tourism Bureau of PTTK (Polish Society of Touring and Tourism) in Biebrza Marshes, some parts of Great Mazurian Lakes, the largest woods and Bieszczady.

* Survival - to be experienced in Biebrza Marshes and Romincki Forest.

* Balloon sport - having long tradition and reemerging now all over the world (and in Poland too), is available in Bialystok and Poznan. Some small tour agencies provide the relevant offer for the amateurs.

* Gliding - there are known gliding centers in Jelenia Gora and foremost in Leszno. If the rather modest means were put in the promotion, the gliding could bring pretty revenues.

* Pantathlon - international awards for Polish pentathletes and modern, well equiped training center in Drzonkow, plus some promotion, could make this sport much more popular among the amateurs, not only the record-seekers.

* Golf - at present there is a few golf fields in Poland. Nevertheless golf have a future : several fields are in preparation near the centres where foreign businessmen use to stay, some are ready now. For example golf courses are to be found near Warsaw , Poznan and in village Postolowo (26 km from Gdansk) - with hotel, restaurant ; also tenis and hunting are available there. However, it is rather recommended to returne to Bournemouth for golf.

*Annex 1. Tourism Organisations/Agencies
and other contacts.*

ORBIS S.A. Bracka, 16, Warsaw, tel: 26 02 71. It is the major agency in Poland. Apart from its main activity (hotel chain, boarding houses, means of transportation, tourist services and programs etc.), it has special branches:

- Office of Foreign Incoming Tourism
- Congress Bureau
- Hunting Bureau
- Rent-a-Car.

Orbis Foreign Offices & Information Centres there are in: Amsterdam, Berlin, Budapest, Chicago, Helsinki, Madrid, Moscow, Praha, Paris, Rome, Sofia, Tel - Aviv, Vienna.

Orbis Companies (Polorbis, Orbis Resor) are situated in: Koln, Hamburg, New York, Stokholm, Malmo, Oslo, Linz.

London, (82 Mortimer str, ; London W1N 7 DE ;
tel: (71) 580 8020, 580 1704; fax: (71) 436 6558.

The others Polish travel agencies:

ALMATUR - Travel and Tourism Bureau of the Association of Polish Students;

CAMPTUR - Camping Tourism Bureau of the Polish Camping and Caravaning Association ;

GROMADA - offers its own hotel chain, boarding houses, holiday centres in rural areas;

HARCTUR - Co Ltd :youth groups, active holiday;

INTERSTER S.A. : water tourism, sailing, yacht charters;

INTOUR - ORBIS : tourism and trade&fair events in republics of former USSR;

JUVENTUR S.A.- Youth Tourist Bureau;

LOT Air Tours;

PEGROTOUR S.A. : specialized tourist events;

POLONIA Co.Ltd - serves primarily tourists of Polish origin;

POLTUR Co.Ltd.; PZM - Polish Motoring Association;

SPORTS-TOURIST - Sporting and Tourist Event Co.;

Polish Tourist Information Center (COIT - Centralny Ośrodek Informacji Turystycznej) is the main tourism information organization (state-owned). Has its headquarters in: Warsaw, ul. Mazowiecka 7 ; tel: 26 64 48 , and branches in 9 towns: (Bydgoszcz, Częstochowa, Gdańsk, Katowice, Kraków, Nowy Sącz, Olsztyn, Poznań, Szczecin - the major tourist centres) and offices in 31 of province capitals.

International Organisations:

Delegation of The Commission of the European Communities,
Al. Ujazdowskie 14, tel: 21 64 01, 625 07 70 ; fax: 625 04 30;

The World Bank,

Stawki 2, tel: 635 05 53, fax: 635 98 57;

United Nations Development Programme,

Al. Niepodległości 186, tel: 25 50 10, 25 94 67, fax: 25 89 70;

Other useful contacts:

A. Warsaw.

State Sport and Tourism Administration (UKF i T),

Świętokrzyska 12, tel: 20 03 11;

Ministry of Foreign Economic Relations,

Pl. Trzech Krzyży 3, tel: 693 50 00, fax: 628 68 08;

Ministry of Transport and Navigation,

Chalubińskiego 4/6, tel: 24 40 00, 628 69 28, fax: 30 00 62;

Main Office of Statistics, Niepodległości 208, tel: 25 32 41, fax: 25 15 25;

The Polish Chamber of Tourism, Wierzbowa 11, tel: 26 82 71, ext 317.

Polish Tourists' Association, Senatorska 11, tel: 26 22 51;

Polish Motoring Association, Kazimierzowska 56, tel: 49 41 38;

Polish Camping and Caravaning Association Grochowska 331, tel: 10 60 50;

Polish Tourist Hoteliers' Association Chocimska 28, tel: 27 79 80;

Warsaw Tourist Information Center , Pl. Zamkowy, 1/13, tel: 635 18 81;

Polish Chamber of Commerce, Trebacka 4, tel: 26 02 21, 26 02 22; fax: 27 47 73;

Private Investors' Chamber of Trade and Industry Widok 12,

tel: 27 80 71, ext 204; fax: 27 77 88;

Foreign Investors' Chamber of Industry and Commerce,

Krakowskie Przedmiescie 47/51, tel: 27 22 34, fax: 26 85 93;

Institute of Tourism

(tourist investment data base is available on computer disc, as well as other information about Polish tourism),

Merliniego 9a, tel: 44 63 47, fax: 44 12 63

B. Krakow.

Chamber of Tourism, 31-120 Krakow, Karmelicka 32, tel: 34 59 96

Krakow Tourist Information Center , 31-154 Krakow Pawia 6,
tel: 22 04 71, 22 60 91;

Wawel-Tourist , 31 123 Krakow, Poselska 22, tel: 22 41 62;

Orbis SA, Rynek Glowny 41, tel 22 30 49;

C. Gdansk.

Chamber of Tourism, 80-502 Gdansk, Halera 234, tel: 43 55 31

Gdask Tourist Information Center , 80-890 Gdansk, Heweliusza 27,
tel: 31 43 55, 331 66 37

Orbis SA, Heweliusza 22, tel: 31 49 44;

D. Poznan.

Chamber of Tourism, 60- 836 Poznan, Mickiewicza 32,
fax/tel: 438-75

Poznan Tourist Information Center , 61-772 Poznan, Stary Rynek 59,
tel: 52 61 56

Orbis SA, Gen Dabrowskiego 1 , tel: 33 02 81, 33 09 41 (Hotel Poznan).

Annex 2. Trade Fairs and Cultural Events in Poland 1992.

A. BUSINESS/CONFERENCE/EXHIBITION

1. The organisers.

In Poland principal organisers of conventions and fairs are:

* ORBIS Congress Bureau which is the member of International Congress and Convention Association (ICCA) and organizes yearly 10 -20 big events.

00 - 950 Warsaw, PO Box 146, Krakowskie Przedmiescie 13,
tel: 26 16 58, fax: 635 77 82;

* Poznan International Fairs,

60-734 Poznan, Glogowska 14, tel: 69 25 92, fax: 66 58 27;

* Biuro reklamy S.A (Warsaw) ;

00-586 Warsaw, Flory 9, tel 49 60 81, 49 60 68, fax: 49 35 84;

* Gebr. Helbig Industrie - Messen GmbH (Warsaw) ;

Warsaw, al. Jerozolimskie, Marriott, tel: 21 31 24, 630 64 15,
fax: 30 09 65;

* Lodz International Fairs;

90-063 Lodz, Piotrkowska 148/150, tel: 36 29 83, 36 86 78;

* Gdansk International Trade Fairs;

80-309 Gdansk, Bazynskiego 1 , tel: 52 49 32, fax: 51 32 36;

* Biuro Kongresow i Wystaw, DEXTER,

Krakow, Wroclawska, 37a , tel: 34 08 08;

2. Localisation.

POZNAN

The main and of highest range is fair center in Poznan (INTERNATIONAL POZNAN FAIRS). Indoor exhibition surface area is 160 000 m².

The major event is Poznan International Fair organized in June from 70 years. In Poznan at disposal is also congress hall for 4 000 persons, and 2180 beds in four-star hotels and 1000 beds in lower class ones. Poznan has good rail and road connections to most important European cities and flights via Warszawa.

For 1993 are established the following fair events in Poznan:

- International Construction Fair (February);
- SPRING - Trade Fair of Consumer Goods (Feb);
- SECUREX - International Exhibition of Property Protection (Feb);
- INFOSYSTEM - International Fair of Electronics, Telecommunications and Computer Engineering (April);
- SALMED - International Trade Fair of Medical Equipment (April);
- POLIGRAFIA - International Exhibition of poligraphy machines (April);
- POLSKIE MEBLE - Trade Fair of Furniture and Interior Decoration (May);
- DREMA - International Trade Fair of Woodworking Machines (May);
- 64TH Poznan International Fair (June);
- AUTUMN - Trade Fair of Consumer Goods (September);
- ASIA IN POLAND (September);
- POLAGRA - International Agro-Industrial Fair (October);
- National Horticultural Exhibition (October);
- TOUR SALON - International Exhibition of Tourism (October);
- TAROPAK - International Fair of Packing and Storing;
- KOOOPERACJA - International Small Buisness Fair (October);
- POLECO - International Ecological Fair (November);
- INTERART - International Fair of Arts (November/December).
- Multi-Media publishing Festival.

WARSAW.

The most important is Congress and Exhibitions Centre in Culture and Science Palace with Congress Hall (seating 2800) and also two large and two small exhibition halls. Built in 1955, it is a fine example of socrealistic architecture, but in terms of telecommunication and other equipment, is rather out of date. Now the negotiations are going in order to renovation of the infrastructure and establishing the modern congress center. The Palace is well located near Railstation, city air terminal and the hotels: Mariott, Holiday Inn, Forum. About 10-20 congress even ts and 15 exbititions take place there each year. The largest trade events there are: International Book Fair and Computer Fair, taking place yearly. Recently, Biuro Reklamy S.A. and Nowea International , based in Dusseldorf, established new Mokotow Trade Fair Centre, offering 5000 sq m of indoor exhibition space and a further 15000 sq m outdoors. The smaller events have their place at much better equiped rooms of hotel "Victoria" (Intercontinental, five stars, six conference rooms with a total surface area of 800m2); or in hotel Mariott. Each of them can organize a congress for 400-600 participants. Also the palaces in Jablonna, Nieborow, Radziejowice are good places for small congresses.

Total number of beds in four/five star hotels in Warsaw is 5900.

The main events in Warsaw are the following:

COMPUTER EXPO (Jan);

HONG KONG IN POLAND (March, Sept);

TELE- FOTO -VIDEO (Oct);

CONTROLA (International Exhibition of Measuring and Control Technology - Oct);;

MEDICA (Oct);

OFFICETEC (Everything for Office - Nov);

and International Specialist Fairs :

'Environmental Protection'

- Apr 'Home and Crafts'

- May 'Man and Nutrition' - June;

'Tour and Travel' - Sept;

KRAKOW.

There is no big congress/fair center in Krakow. However, quite a lot events take place there. It is due to the character of the city, its eminent position in Polish culture and science.

The only modern congress center is Hotel FORUM (Intercontinental Hotels chain). Its four conference rooms may host about 200 people.

Also universities' rooms can be and are used for congresses.

Total number of beds in four-star hotels in Krakow is about 2000.

Krakow has rail and flight connections to a number of foreign centres.

LODZ

As a center of textile industry, Lodz is a organizer of many trade and exhibition events in the field of clothing and textiles. Into the major ones can be count "INTERFASHION" - International Fair of Textile, Knitting, Clothing and Leather Goods (June), hosting over 200 domestic and foreign participants.

Other main events in Lodz are: (the names well describe its subject)

INTERTELECOM - (April);

INTERGLASS - (May);

INTERCHRISTIANA - (Christian Art Fair -September);

INTERTOY - (October);

INTERFLOWER - (November).

It should be stressed that Lodz has neither typical congress/ exhibition facilities nor modern hotel accommodation, beside 1 080 beds in four-star hotels.

GDANSK - GDYNIA.

During last 10 years Gdansk become a place for many fair and trade events. They are located mainly at multi-function "Olivia Hall". Its capacity is 4500.

As a port and shipyard centre Gdansk organizes the events relating to sea industries - with at the first place :

BALTEXPO - Fair of shipping&port equipment;

the others are:

POLFISH - International Fair of Fishing Industry and Goods (May);

HOUSEBUILDING - International Fair of Housing and Interior Design (Oct);

INFOMAN - International Computer/Software Fair (September);

HOUSEBUILDING - International House Construction and Furnishings Fair (Oct).

B. FESTIVALS/EVENTS

The most important cultural events in Poland are :

Music Festival in Lancut (May)

International Book Fair - Warszawa (May)

International Festival of Organ and Chamber Music - Koszalin (summer)

Mozart Festival in Warsaw, comprising all of his operas and many of instrumental works (June - August)

International Festival of Street Theater - Jelenia Gora and Krakow (August)

International Chopin Festival - Duszniki Zdroj (August)

International Festival of Highlanders'folk Music - Zakopane (August)

International Festival of Song and Dance Troups - Zielona Gora (September)

"Wratislawia Cantans", International Festival of Oratorios and Cantates -

Wroclaw (September)

International Festival of Contemporary Music "Warsaw Autumn" - (September)

International Jazz Festival "Jazz Jamboree" - Warszawa (October)

International Fr. Chopin Piano Competition - Warsaw

(organised every four years; next in 1994).

Annex 3. Bibliographical Guideline.

Suggestions what to read about Poland, Polish tourism and Polish economy are developed here.

1. There is a number of professional (tourism, travel, hospitality) journals, where from time to time some articles on the business Eastern (some prefer to say: Central) Europe, including Poland, can be found. Most of them are available at the Bournemouth University Library, others will be in the near future.

Here is the list of more important titles and selected articles:

Annals of Tourism Research

Brayley, R& Przeclawski, K,
Tourism's perceived impacts in centrally-planned economies,
no 18(4) 1991;
Golembki, G,
Tourism in the economy of shortage,
no 17(1) 1990;

Geographical Magazine

Wiszka, A & Hindson, J,
Protecting a Polish Paradise
(refers to Tatra mountains)
no 63(6) Jun 1991;

Hall, D,
Eastern Europe opens its doors,
no 62(4) Apr 1990;

Holiday Which

Where to go in Eastern Europe,
Jan, 1991;

Hotels

Baum, C
Martin, F
Lerner, M
series of articles on hotel developments
24(4) Apr 1990

Baum, C
Here come the hotel chains
Carper, J
The east is open
no 24(10) Oct 1990 (both)

International Tourism Reports

Hunt, J,
Poland (report on tourism in Poland)
no 2 1992;

Marketing

Sambrook, C,
Eastern Europe opens up,
17 Jan 1991;

Travel Agency

McGeehan, A,
Accepting the price of tourism growth?
Jan 1991

Tourism Magement

Hall, D,
The challenge of international tourism in Eastern Europe
no 13(1), Mar 1992;

Franck, C,
Tourism investment in Central and Eastern Erope: preconditions
and opportunities,
no 11(4) Dec 1990;

Medlik, S,
Focus on Eastern Europe
no 11(2) Jun 1990;

Tourism Recreation Research

Lonc, T,
The potential of the development of tourism in conjunction
with agriculture in Poland,
no 16(1) 1991;

Town and Country Planning

Hall, D,
The changing face of of tourism in Eastern Europe,
no 59(12) Dec 1990;

Travel and Tourism Analyst, issued bimonthly by Economist Intelligence
Unit (EIU).

Eastern Europe Outbound,
no 5/1992;
Kerpel, E,
Tourism potential in Eastern Europe
1 / 1990

Travel Trade Gazette UK
Richardson, D,
Eastern Europe,
no 2002, 9 Apr 1992;
no 1955, 2 May 1991;

Crawshaw, G
Business hotels,
1991, Apr 1990

Problems of Tourism - the journal issued quarterly by Institute of Tourism (Warsaw) in English - publish current information on polish tourism industry and tourism development.

Will be available at the Bournemouth University Library soon.

Information on Polish/Eastern Europ economy and business is sometimes provided by *Economist*, *The Financial Times* and other, accidentally.

The very new English journal - *Business Central Europe* has a chance to become the best source in the field.

The promotional materials, issued by Polish Tourist Authority (central and regional as well), and also - by district/town councils are of good value in terms of graphic design and information contents.

The two are particularly worth recommending:

- ***Destination Poland***
(general overview of the country, some articles, and above all - very good fotos);
- ***East - West. The VIP Guide***
(designated for buisness travellers; plenty of useful information, & suggestions for time-off).

For those who are interested in Poland more deeply, there is a very informative and well written book on history of Poland, published in England a couple years ago by British historian.

This is:

The God's Playground
by Norman Davies.

Conclusion.

This report was prepared during my stay at Bournemouth University on three-month scholarship from The British Council. The aim of the institution that granted me is "promoting cultural, educational and technical co-operation between Britain and other countries".

My aim was well-fitted to this and could be described as "promoting tourist cooperation between Britain and Poland".

I have learnt very much about Britain and British tourism and my report is intended to be a contribution to broadening a knowledge about Poland here, in Britain.

This knowledge is rather small, in fact.

For example, Poland is perceived as a very remote country, somewhere in the East.

The truth is that road distance from London to Warsaw is 1540 km, and flight to Poland takes about 2h 15min. (To Rome is by road above 1700 km). The truth is also that some political problems are very similar (which was very surprising for me).

The level of tourist traffic from UK to Poland is rather high, the volume trade is also not so low - 7.9% of Polish exports goes to UK and 3.8% of Polish imports comes from.

ICI, Trust House Forte, ICL, Eastman Kodak set up their companies in Poland, Barclays Bank has its branch in Warsaw.

What is needed now is to make Poland not so far - in the minds of British people.

I do hope that my report would be a first step towards establishing data bank and resource centre at Bournemouth University, which might provide up-dated information on Poland to researchers, tour operators and the public.

BIBLIOTEKA IT
Archiwum Państwowe
Naukowo-Badawczych