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**TOURISM DEVELOPMENT IN POLAND**  
**ROZWÓJ TURYSTYKI W POLSCE**

**THE CHALLENGE OF TOURISM PRODUCT  
DEVELOPMENT IN POLAND, WITH  
SPECIAL REFERENCE TO LOWER SILESIA**

**CONFERENCE PAPERS AND MAJOR REPORTS, REVIEWS**

PRODUCT DEVELOPMENT - CONFERENCE PAPER I

**THE CHALLENGE OF TOURISM PRODUCT  
DEVELOPMENT IN POLAND, WITH  
SPECIAL REFERENCE TO LOWER SILESIA**

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## **Introduction**

Research into the possibilities of further tourism product development in Poland presupposes that appropriate attention is paid to the following topics:

1. concepts and definitions of tourism;
2. the characteristics of the tourism system and its environment;
3. the conditions for tourism development as an economic activity subject to market forces;
4. differentiation in tourism demand;
5. differential impact analysis, which accounts for differences in types of demand, types of supply, and the specific characteristics of the institutional and physical setting of tourism development in specific locations.

The present paper will concentrate on the items 1 to 3, and furthermore give some implications for tourism product development in Lower Silesia.

## **Tourism: Basic Concepts and Definitions and their Application in Poland**

In common parlance and sociological research tourism is identical to pleasure travel. From that point of view tourism is a leisure pursuit and can be typified as a form of consumption. However, besides being an activity in the sphere of consumption, tourism can also be viewed as a production activity. In a supply-oriented definition the needs and motives of travellers are no longer of decisive importance. Attention then focuses on "the units in the economy that share a common function or output" (Baum and Tolbert, 1985: 71) with regard to the production of goods and services to be consumed by visitors or travellers. Consequently, from the supply side tourism, and more precisely the tourism sector, can be defined as "the aggregate of all businesses that directly provide goods or services to facilitate business, pleasure and leisure activities away from the home environment" (Smith, 1988: 183).

This corresponds with the definition of international visitors used in international statistics.



In these statistics an international visitor is "any person visiting a country other than that in which he has his usual place of residence, for any reason other than following an occupation remunerated from within the country visited". International visitors may be excursionists or tourists. International tourists are "visitors staying at least one night in the country visited", whereas excursionists are visitors which do not meet the time criterion or are on a cruise (UNCTAD, 1971: 8-9). Beside pleasure travel or recreational travel, this broad definition of tourists/tourism includes business travel, travel to attend meetings and conferences, visiting friends and relatives (VFR), pilgrimages and so on.

Since in Poland under the former regime the goal was to strive for "tourist travel by all and the use of tourism as a means of education, especially of the young" (Ostrowski, 1976: 185) and tourism was thus considered to be a vehicle for achieving social and educational objectives for which the State had to provide grants, little need or incentive existed to care much about economic costs and benefits and the application of internationally accepted concepts and definitions needed to measure these adequately. In a situation, however, in which dependence on subsidies is no longer taken for granted and is no longer the rule and in which attaining maximum economic efficiency is of utmost importance, it is somewhat disturbing to note that basic concepts and definitions are either not applied or deviate from standard international practice.

Some examples from recent scientific literature may illustrate this concern. The term excursionists is wrongly used to denote group tourists as opposed to individual tourists (Warszyńska, 1992: 32); an unclear distinction is made between tourists and holiday-makers as though it were two separate groups which do not overlap (Kostrzewa and Wilus, 1992: 77); tourist traffic and visitor traffic are frequently mixed up and used interchangeably (Bartoszewicz, 1992). It seems that at least one author, Kuszewska (1992:113), is aware of this confusion. She at least concedes that "in the Polish statistics foreign tourists are, practically speaking, all foreigners who cross the border of the country". In this way Poland is able to claim that in 1991 it received 36,845,800 tourists, the overwhelming majority of which have in fact been excursionists. On the basis of data provided by the Central Statistical Office (GUS) it may be concluded that out of the total of almost 37 million foreign visitors at most 2,128,836, or less than 6%, have actually been tourists who stayed overnight in



accommodation establishments (Główny Urząd Statystyczny, 1992: 32). Due to the relatively high number of VFR's, a large number of whom use private (not registered) accommodation, the actual number of foreign tourist arrivals considerably exceeds the number registered in accommodation establishments. According to WTO (1992) data Poland recorded 3,800,000 foreign tourist arrivals in 1991. This implies that total tourist arrivals made up 10.3 per cent of total visitor arrivals in 1991. Claiming that in 1991 almost 37 million international tourists came to Poland is not only a sure way to deceptive optimism as to the economic benefits derived from tourism, but has also little value in planning countrywide or regional accommodation capacity.

For relative insiders, however, not everything is as gloomy as it seems at first sight. The Central Statistical Office publishes a wealth of detailed data on tourism from which some meaningful statistics could be derived, which in turn could provide assistance in framing realistic policies for further product development in Poland, both at national and regional level.

#### **Recommendation/Action proposal**

The Central Statistical Office should be encouraged to provide - in co-operation with the Institute of Tourism - more meaningful statistics on tourism, both for the national and decentralised levels.

### **The Characteristics of the Tourism System and Its Environment**

From the definition of the tourism sector as the aggregate of all businesses that directly provide goods and services to facilitate business, pleasure and leisure activities away from the home environment it becomes clear that the product in tourism is a composite one consisting of such diverse services as those generated in transport, accommodation, travel trade, information centres, attractions and entertainment.

Tourism basically consists of two components: travel to and stay at a destination. The travel component presupposes accessibility. This in turn requires the existence of a sufficient transport infrastructure (roads, railways, airports and harbours) and means of transport (cars,



coaches, trains, planes and ships). For the stay at a destination facilities for 'food, lodging and entertainment' are a prerequisite.

Dziegiec (1992: 86) rightly notes that "The size and forms of tourist traffic are dependent upon many factors, but mainly on tourist attractions and availability of tourist facilities". In pleasure travel the demand for accommodation is a derived demand, a demand derived from that for attractions. The "attraction value" of a destination is thus of primary importance. "A successful tourism industry derives from the existence of an asset which is not generally available and which is immobile. The asset is fundamental to the industry". Therefore, "Probably nothing in the analysis of tourism is more important than the preservation of the foundation assets" (Gray, 1982: 110-111).

In view of this tourism policy-makers at all levels in Poland should be concerned about and alarmed by the present state of the environment. Poland's image of a polluted country is severely hurting its chances of tourism development. It is clearly not very positive, for the indigeneous population nor for potential tourists, to learn about the fact that over a third of the population of Poland lives in regions that are hazardous to health and heading for an ecological crisis. This fact, mentioned by Parteka and Juchnowicz (1992: 127), should be of particular concern to the tourism policy-makers at national level. The fact that according to these authors "The splendid pine forests of the Izerski mountains are dying, and it is scarcely more beneficial from a health point of view to take a holiday in the Karkonosze than to remain in the town" and that according to Jagusiewicz (1985: 10) four health resorts are threatened by loss of therapeutic value should alarm the tourism policy-makers at voivodship and gmina levels in Lower Silesia.

**Recommendation/Action proposal**

The State Sport and Tourism Administration (SSTA) should seek a close working relationship with the Ministry of the Environment in order to receive first hand up-to-date information on the situation of the environment in tourist regions, and devise joint programmes to improve this situation and prevent tourism itself from becoming an environmental hazard.



To return to the characteristics of the tourism system, the fact that the product in tourism is a composite one implies that the concept of a value chain (Porter, 1990) applies. The present drive towards computerisation to link up the various segments of the tourism sector is the modern day proof of this. The various travel vendors function increasingly within a chain of economic transactions which forms the lifeline for each of the separate activities. The success or failure of one segment impacts on the others and this implies that an integrated sectoral approach has to be pursued.

**Recommendation/Action proposal**

At the level of gminas, powiats and voivods the various segments of the business sector in tourism should seek to co-operate in order to develop tourism effectively and avoid possible capacity bottlenecks. Co-operation should comprise both the planning and development phase and the management and marketing phase.

In order to be able to do so voluntary associations should be formed where these do not yet exist.

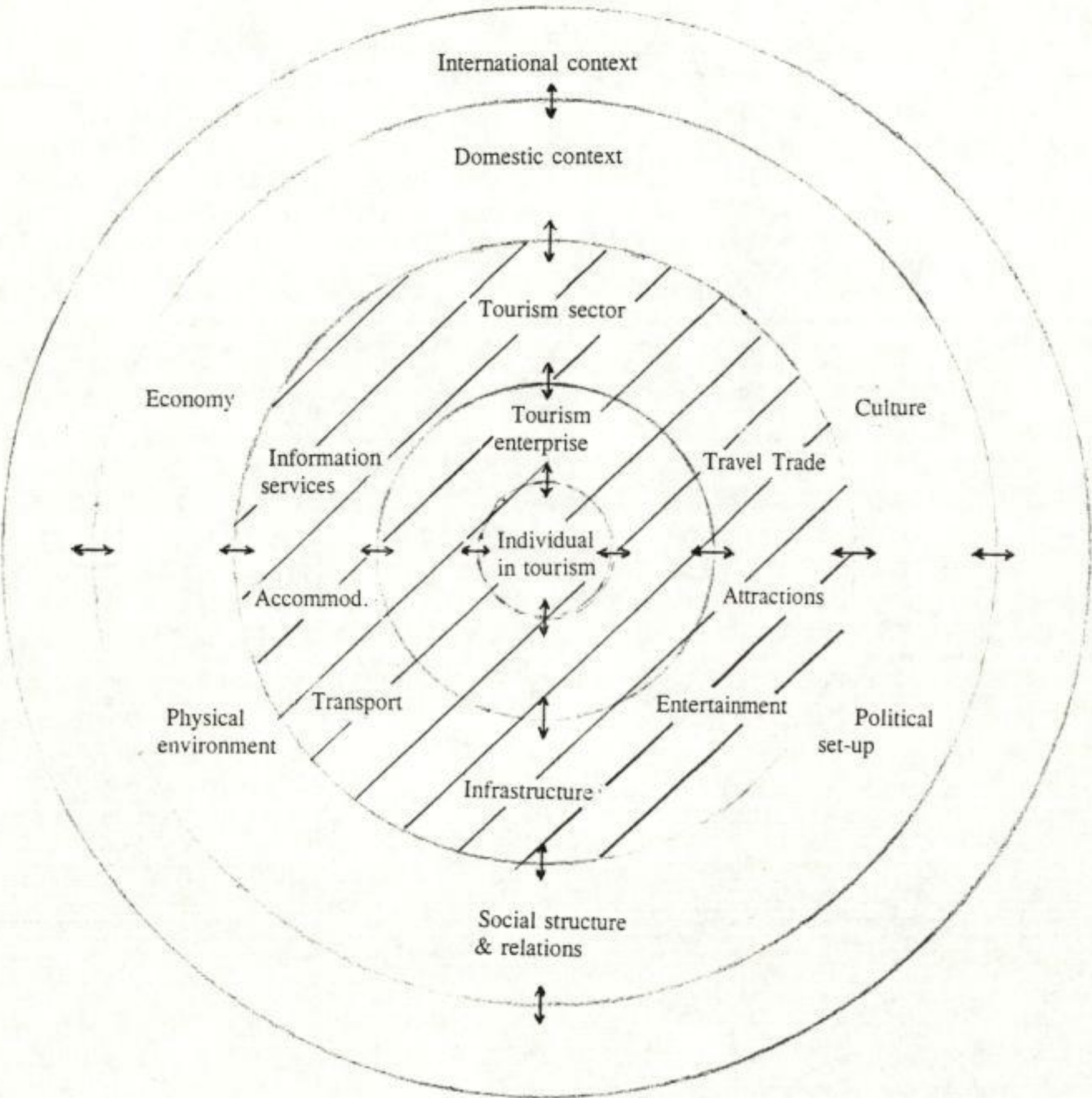
At all levels increased attention will need to be paid to the possible benefits of computerisation

Tourism sector activity, moreover, does not function in isolation, but rather intermingles with the wider economic, social, cultural, ecological and political context, both nationally and internationally. The resultant inter-dependent system can graphically be depicted by way of a number of concentric circles (Figure 1).

The domestic context can be broken down into the local (gmina), subregional (powiat), regional (voivod) and national level. The international context in turn consist of an inner zone, an outer-zone, and a peripheral zone (Ritter, 1966), which can, in view of technological developments, in present-day terminology be roughly equated with the areas from which short haul, medium haul and long haul traffic originates respectively.



Figure 1. THE TOURISM SYSTEM AND ITS ENVIRONMENT



- ↕ denotes interaction
- ▨ denotes the tourism system

Source: Based on Lorsch & Morse (1974)



## Conditions for tourism development

Since tourism is embedded in local, subregional, regional and national society it cannot be successfully developed and secured in the long term without paying adequate attention to both location-specific and wider environmental and social needs. This implies that a continued access to resources, both natural and man-made, and an equitable distribution of costs and benefits has to be taken into account (Singh, Theuns, Go, 1989: 12).

Safeguarding a continued access to resources implies protection of both nature and national heritage. Safeguarding an equitable distribution of costs and benefits is needed in order to prevent the rise of resentment among segments of the host population in tourism areas. Both the care of the environment and an equitable distribution of costs and benefits are clearly government tasks. The role of the government is essential as no other institution can be held responsible for them and is at the same time endowed with sufficient powers to ensure that such tasks are carried out effectively.

Tourism, moreover, is not monolithic, but manifests itself in many different types or forms. As Cohen (1974: 527) notes "One of the more interesting features accompanying the contemporary tourism boom is the extraordinary proliferation of diverse forms of tourism, ranging from short excursions to round-the-world trips, from sea-side vacations to veritable expeditions into almost unknown parts of the world ( ), from organized and routinized mass-travel to leisurely, individualized exploration or drifting off-the-beaten-track".

Since attractions, amenities or assets are the prime movers in tourism it is evident that there is a direct relation between the type of amenity and the type of tourist and tourist activity. This point is clarified by the market oriented checklist of amenities, infrastructure and facilities compiled by Prof. A.S.Travis (Annex I). It implies that assessment of the attraction value of resources is at the basis of any policy to develop tourism. A thorough assessment of resources can provide an indication of the type and volume of potential tourists to be attracted and, consequently, the facilities and infrastructure to be developed to cope with demand.



**Recommendation/Action proposal**

Gminas, powiats and voivods interested in developing tourism should give priority to the market oriented evaluation of their tourism resource base. In order to guarantee that local perceptions do not substantially deviate from those of outsiders external assistance should be sought for this.

The attraction value of amenities is a function of the degree of uniqueness of what is on offer. Consequently large differences are discernable between on the one hand assets or amenities with a worldwide appeal such as for instance the Borobudur in Indonesia and the Grand Canyon in the United States and on the other hand attractions or amenities with a local appeal only. The latter category by definition does not generate tourist traffic but only excursionist visits.

Taking into account the attraction value of assets based on the notion of hierarchy the following classification of amenities can be made:

- assets with a truly worldwide appeal
- assets with a less wide but still international appeal
- assets with a national appeal
- assets with a regional appeal
- assets with only a local appeal

This notion of hierarchy is applied by Wyrzykowski (1992: 50) in classifying the amenities of Wrocław into on the one hand objects of European significance and on the other hand objects of general national significance.

Only really unique amenities having a truly worldwide appeal do not face the danger of substitution by similar attractions, since by definition those do not exist. All other amenities are subject to the law of intervening opportunities and have to compete in highly competitive and price-sensitive generating markets.

Under these circumstances the possibilities for tourism development are not just dependent on having tourist amenities, but are also determined by such factors as price level and the capacity and quality of the tourist facilities and infrastructure (transport, telecommunication,



water- and energy- supply, sanitation). The relations between demand and supply can be visualized in a schematic description of the market in tourism (Figure 2).

Short- and long- run competitive positions are directly influenced by sectoral policies. Such policies can be pursued by government and private sector organisations at national, regional, sub-regional and local level, either separately or, as part of a wider collaborative planning and development approach, as advocated by Gunn (1977).

#### **Recommendation/Action proposal**

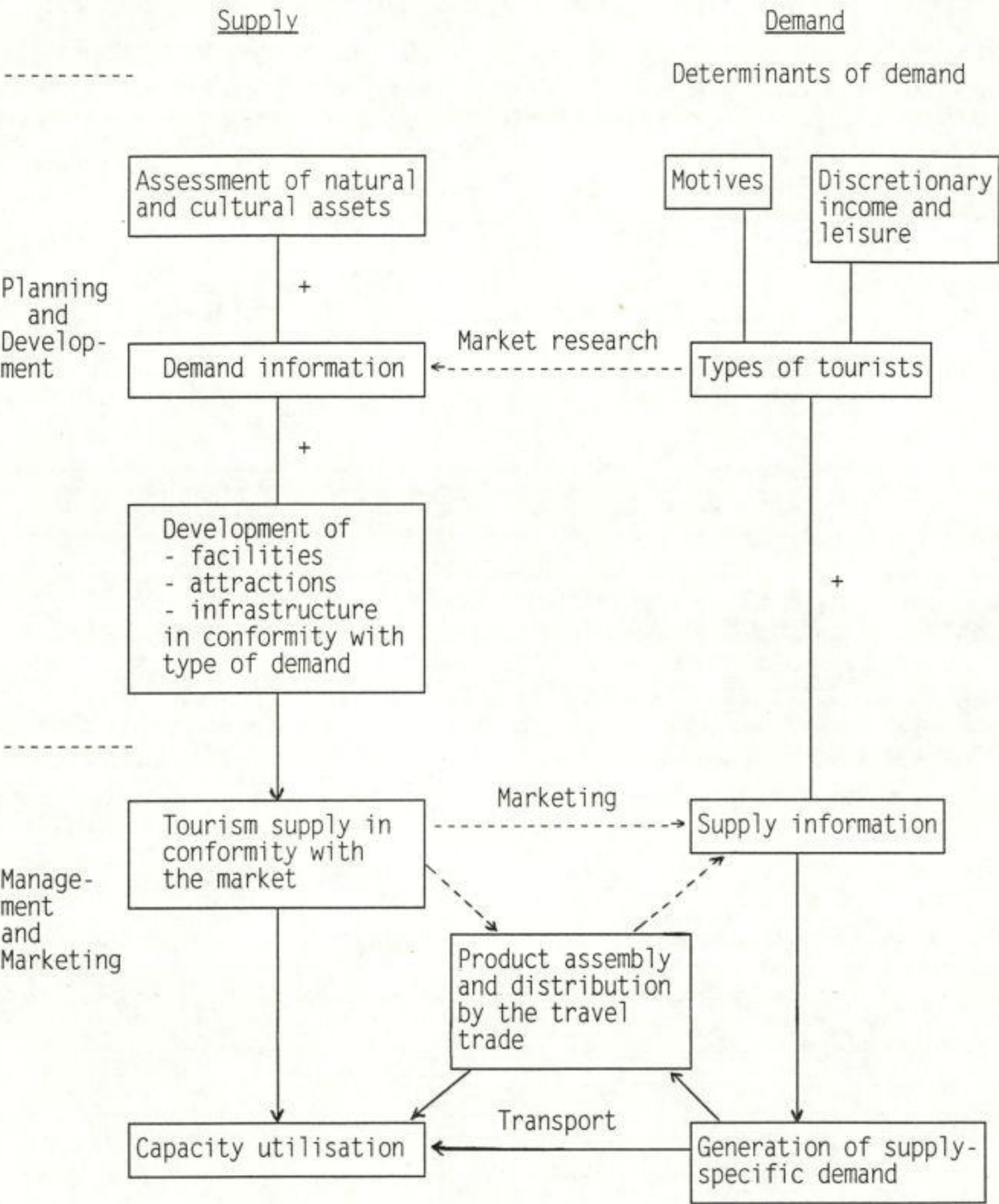
Sectoral policies should preferably be framed and implemented by government at various levels in close consultation with business sector tourism associations. If such associations do not yet exist their establishment should be given serious consideration.

#### **Implications for Tourism Product Development in Lower Silesia.**

"Tourism in any country is the product of the availability of amenities and facilities and the demand for these" (Dawson, 1991: 194). In market economies in which freedom of travel exists, the recognition of what is considered an amenity worth visiting and a facility worth using is determined by market demand. The fact that it is thought that 46.5 per cent of Poland is of "tourist value" (Rocznik Statystyczny, 1987: 506) is of little value in devising a strategy to develop tourism. If such a percentage of the country's area is considered to be of "tourist value" amenities cannot be but thinly spread over a vast area. The same holds, albeit probably to a lesser extent, for the statement (SSTA, 1993) that for one third of all communes and regions of Poland tourism is the only chance for economic revitalisation. Since for the development of tourism both concerted action and a critical minimum effort is required it is necessary to search for areas of relatively limited size in which a multitude of amenities is to be found, that taken together provide enough added on "attraction value" to make tourism development a feasible proposition. In Poland "The existing spatial structure, ( ) is characterised by considerable dispersion and shortages in complementary development" (Jagusiewicz, 1985: 11). The foundation of the Inter-Municipal Association "Consortium Tourist Six" in Wałbrzyskie can in view of this be considered a step in the right direction and is therefore to be applauded.



Figure 2. THE MARKET IN TOURISM



Source: Theuns, 1989.



### **Recommendation/Action proposal**

Both government institutions at sub-national level charged with tourism development and tourism business sector associations at sub-national level should in formulating development plans search for and identify areas of a relatively limited size with an adequate degree of added on "attraction-value" to make development efforts feasible.

The search for such regional or sub-regional tourism zones, or primary destination areas as parts thereof, can be guided by indications to be derived from the perceptions of the scientific tourism community, foreign tour operators and travel guidebooks. Taking the distribution of the existing accommodation stock in Poland as the sole yardstick is in the present situation of transition to a market economy to be considered inadequate and potentially misleading. However, since under free market conditions tourists vote with their feet, the relative distribution of tourist arrivals may provide an indication which gains in significance during time.

As to Lower Silesia the amenities as perceived by both the scientific tourism community (Cf. Kerpel, 1990: 93; Dawson, 1991: 198) and foreign tour operators (Cf. the brochures of the German operators GTI, Ost Reise Service (ORS) and Touristik Union International (TUI) and the Dutch operators De Jong Intra Vakanties and Hotelplan) supplemented by information contained in some travel guides (Cf. for instance Horn and Pietras, 1992; Salter and McLachlan, 1991) indicate that within Lower Silesia two voivodships, namely Jeleniogórskie and Wałbrzyskie have the capacity to qualify as a regional tourism zone. This is confirmed by statistical data on tourist arrivals and overnight stays as can be seen in Tables I and II. Table I shows that in 1991 10 per cent of foreign tourist arrivals as registered in accommodation establishments, and 11.7 per cent of both foreign and domestic arrivals in accommodation establishments in Poland were in Lower Silesia. Almost 36 per cent of foreign arrivals and 53 per cent of total arrivals in accommodation establishments in Lower Silesia were realised in the two voivodships of Jeleniogórskie and Wałbrzyskie. The strong position of the voivodship of Wrocławskie is due to the predominant position of the (historical) city of Wrocław as can be deduced from the fact that 40 per cent of the total hotel and motel guest overnight stays and more than 50 per cent of foreign hotel and motel guest



overnight stays in Lower Silesia took place in this voivodship.

Table II shows that in 1991 10.2 per cent of foreign overnight stays and 10.6 per cent of all, both foreign and domestic, overnight stays in tourist accommodation establishments in Poland took place in Lower Silesia. Of these 44.4 and 64.6 per cent respectively were in Jeleniogórskie and Wałbrzyskie, which indicates that these two voivodships are typical holiday areas, whereas tourism in Wrocławskie is characterised by a relative concentration of stays in hotels and motels and a relatively short duration of stay typical for business travel. Data on the average duration of stay are presented in Table III. Although in three out of five voivodships the average stay is of a reasonable duration, average annual bed occupancy rates are far too low to enable profitable operation of accommodation establishments (Table IV). The situation is particularly alarming for hotels and motels, which are confronted by high fixed costs. The problem will have to be solved by:

- \* increasing the number of tourist arrivals, both domestic and foreign, by an increased and improved marketing effort. Even in the high season months of February, July and August (Table V), in which there are school holidays in Poland, there is still ample space available;
- \* prolonging the stay of both domestic and foreign tourists by developing additional recreation facilities;
- \* closing down that part of the accommodation stock which has no chances to survive in the long run; and
- \* upgrading some facilities with a view to foreign markets, through additional investment both in the renovation of the facilities themselves and in increasing the supply of - preferably year-round - recreational facilities.

#### **Recommendation/Action proposal**

In order to reach satisfactory levels of operational benefits action should be taken in Lower Silesia to improve the degree of capacity utilisation in tourist accommodation establishments in general and in hotel and motels in particular.

Since the unemployment rate in Jeleniogórskie and Wałbrzyskie was 17 per cent already in 1989, the need to create a viable tourist sector, given its potential, is undeniable. Since this unemployment rate is substantially above the 1989 national average of 11 per cent (Table VI)



these voivodships should qualify as an economically depressed area entitled to special fiscal benefits from the central government for regional (tourism) development. The fact that percentagewise both the total tourist accommodation arrivals and the total overnight accommodation stays are consistently higher than the share in both the total area and population of Poland clearly indicates that these voivodships should qualify as a regional tourism zone which should be entitled to special attention from the tourism authorities at central level. That this conference is held in Książ castle bears witness to the recognition of this fact.



**Table I NUMBER OF GUESTS, TOTAL AND FOREIGN, IN ACCOMMODATION ESTABLISHMENTS IN LOWER SILESIA, 1991**

Voivodship	Hotels/Motels		Pensions		Holiday Villages	
	Total	Foreign	Total	Foreign	Total	Foreign
Jeleniogórskie	88,562	37,012	13,848	4,771	123,857	4,311
Legnickie	31,999	9,957	-	-	1,255	1
Opolskie	55,773	17,831	-	-	20,816	428
Wałbrzyskie	49,804	11,705	2,307	1,454	71,016	2,224
Wrocławskie	153,748	81,269	-	-	6,626	-
Total	379,886	157,774	16,155	6,225	223,570	6,964
Total as % of Poland	11.6	10.9	18.8	23.3	11.7	9.5

**Table I (continued)**

Voivodship	Private Guest Rooms		Campings		Group Accommodation	
	Total	Foreign	Total	Foreign	Total	Foreign
Jeleniogórskie	13,506	1,635	4,260	3,011	10,649	571
Legnickie	-	-	211	68	4,546	917
Opolskie	7,006	1,845	14,940	1,125	7,184	339
Wałbrzyskie	2,472	31	6,177	1,297	21,809	2,461
Wrocławskie	8,474	375	11,102	3,675	31,327	6,134
Total	31,458	3,886	36,690	9,176	75,533	10,422
Total as % of Poland	10.3	8.0	9.8	8.2	9.2	4.7



**Table I** (continued)

Voivodship	Miscell. Accommod.		Total Accommodation		Total Accommod. as %	
	Total	Foreign	Total	Foreign	Total	Foreign
Jeleniogórskie	81,289	3,119	335,971	54,430	32.6	25.7
Legnickie	12,639	1,236	50,668	12,179	4.9	5.7
Opolskie	46,058	2,532	151,777	24,100	14.7	11.4
Wałbrzyskie	58,390	2,378	211,975	21,550	20.6	10.2
Wrocławskie	69,656	8,125	280,933	99,578	27.2	47.0
Total	268,032	17,390	1,031,324	211,837	100	100
Total as % of Poland	13.0	8.9	11.7	10.0		

Source: Based on Główny Urząd Statystyczny, 1992.

**Table II OVERNIGHT STAYS IN TOURIST ACCOMMODATION IN LOWER SILESIA, 1991**

Voivodship	Hotels / Motels		Pensions		Holiday Villages	
	Total	Foreign	Total	Foreign	Total	Foreign
Jeleniogórskie	186,335	94,705	57,815	15,426	1,017,824	17,947
Legnickie	83,052	17,102	-	-	12,887	1
Opolskie	94,250	38,023	-	-	217,769	3,593
Wałbrzyskie	93,561	30,906	10,532	6,046	796,108	11,235
Wrocławskie	262,364	162,583	-	-	47,573	-
Total	719,562	343,319	68,347	21,472	2,092,161	32,776
Total as % of Poland	11.2	10.8	16.9	28.3	10.0	7.2



Table II (continued)

Voivodship	Private Guest Rooms		Campings		Group Accommodation	
	Total	Foreign	Total	Foreign	Total	Foreign
Jeleniogórskie	94,589	8,550	10,537	6,289	42,470	682
Legnickie	-	-	629	125	10,370	2,828
Opolskie	13,883	3,317	70,493	2,002	51,712	1,562
Wałbrzyskie	13,459	35	13,276	3,490	56,012	5,635
Wrocławskie	103,014	3,221	28,932	5,984	68,316	10,425
Total	224,945	15,123	123,867	17,890	228,880	21,132
Total as % of Poland	10.5	12.2	8.3	7.8	11.6	5.0

Table II (continued)

Voivodship	Miscell. Accommod.		Total Accommodation		Total Accommod. as %	
	Total	Foreign	Total	Foreign	Total	Foreign
Jeleniogórskie	355,078	15,938	1,764,648	159,537	38.1	31.3
Legnickie	52,512	2,458	159,450	22,514	3.4	4.4
Opolskie	302,641	15,369	750,748	63,866	16.2	12.5
Wałbrzyskie	245,021	9,338	1,227,969	66,685	26.5	13.1
Wrocławskie	224,214	15,297	734,413	197,510	15.8	38.7
Total	1,179,466	58,400	4,637,228	510,112	100	100
Total as % of Poland	11.3	11.1	10.6	10.2		

Source: Based on Główny Urząd Statystyczny, 1992.



Table III AVERAGE DURATION OF STAY IN LOWER SILESIA, 1991

Voivod ship	Hotels / Motels		Pensions		Holiday Villages		Private Guest Rooms	
	All Guests	Foreign	All Guests	Foreign	All Guests	Foreign	All Guests	Foreign
Jelenio górskie	2.1	2.6	4.2	3.2	8.2	4.2	7.0	5.2
Legnic kie	2.6	1.7	-	-	10.3	1.0	-	-
Opol skie	1.7	2.1	-	-	10.5	8.4	2.0	1.8
Wałbrzy skie	1.9	2.6	4.6	4.2	11.2	5.1	5.4	1.1
Wrocław skie	1.7	2.0	-	-	7.2	-	12.2	8.6
Total Lower Silesia	1.9	2.0	4.2	3.4	9.4	4.7	7.2	3.9

Table III (continued)

Voivod ship	Campings		Group Accommm.		Miscell.Accomm.		Total Accommm.	
	All Guests	Foreign	All Guests	Foreign	All Guests	Foreign	All Guests	Foreign
Jelenio górskie	2.5	2.1	4.0	1.2	4.4	5.1	5.3	2.9
Legni ckie	3.0	1.8	2.3	3.1	4.2	2.0	3.1	1.8
Opol skie	4.7	1.8	7.2	4.6	6.6	6.1	4.9	2.7
Wałbrz yskie	2.1	2.7	2.6	2.3	4.2	3.9	5.8	3.1
Wrocła wskie	2.6	1.6	2.2	1.7	3.2	1.9	2.6	2.0
Total Lower Silesia	3.4	1.9	3.0	2.0	4.4	3.4	4.5	2.4

Source: Based on Główny Urząd Statystyczny, 1992.



**Table IV AVERAGE ANNUAL BED OCCUPANCY RATES  
IN LOWER SILESIA, 1991**

Voivodship	Hotels/ Motels	Pen- sions	Holiday Villages	Private Guest- rooms	Cam pings	Group Accomm.	Miscell. Accomm.	Total
Jeleniogór- skie	26.2	11.5	27.0	12.5	6.6	20.7	17.9	21.8
Legnickie	20.6	-	15.2	-	3.7	26.8	12.1	16.3
Opolskie	25.7	-	17.4	17.5	10.4	29.4	14.6	16.2
Wałbrzyskie	19.5	16.8	29.9	9.4	5.1	13.7	10.6	19.4
Wrocław skie	30.4	-	16.3	64.1	9.8	26.6	16.5	22.8
Total Lower Silesia	25.5	12.1	26.0	19.8	8.8	21.1	14.4	19.9

Note: Rates are consistently lower than those published by the Central Statistical Office, because year-round capacity has been used here.

Source: Based on Główny Urząd Statystyczny, 1992.

**Table V SEASONAL VARIATION OF TOURIST OVERNIGHT STAYS IN  
ACCOMMODATION ESTABLISHMENTS IN LOWER SILESIA, 1990/1991**

Voivo dship	Seasonal Indices											
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Jele niogó rskie	86	64	95	96	139	86	74	89	92	140	130	73
Legni ckie	92	75	58	70	76	76	107	94	111	153	126	91
Opol skie	64	77	75	82	86	70	73	75	70	164	138	55
Wał brzy skie	89	69	94	90	127	96	84	100	106	130	112	74
Wroc ław skie	101	102	91	84	83	93	105	102	92	122	121	83

Note: Seasonal indices are compiled by taking average annual occupancy rates as 100.

Source: Based on Główny Urząd Statystyczny, 1992.



Table VI BASIC INDICATORS ON LOWER SILESIA AT THE END OF 1989

Voivodship	Area km2		Population x 1000		Unemployed	Unemployment rate %	Total tourist accom. arrivals 1991 as % of Poland	Total over night acc. stays 1991 as % of Poland
	abs.	%	abs.	%				
Jeleniogórskie	4,378	1.4	517.0	1.4	43.000	16.8	3.8	4.0
Legnickie	4,037	1.3	512.0	1.4	36.300	13.9	0.6	0.4
Opolskie	8,535	2.7	1,014.9	2.7	43.600	8.8	1.7	1.7
Wałbrzyskie	4,168	1.3	741.2	1.9	58.900	17.1	2.4	2.8
Wrocławskie	6,287	2.0	1,126.3	3.0	39.900	7.7	3.2	1.7
Lower Silesia	27,405	8.7	3,911.4	10.28	221.700	11.8	11.7	10.6
Poland	312,680	100	38,038	100	2,155,600	11	100	100

Source: Central Statistical Office, 1992; Rzążewska, 1993; Tables I and II.



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PHARE TOURISM PROGRAMME  
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CHECKLIST OF NEEDS FROM POLISH PAST STUDIES ON TOURISM  
Revised by H.Leo Theuns

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1. TOURISM RESOURCE POTENTIAL INVENTORISATION:

Where, and in which regions will you find high quality potential resource-based tourism products

a) Airbased resources: i.e. good places for flying for sport, for gliding, for hang-gliding, for microlites etc  
- right air conditions, and appropriate topography.

b) Seawater-based resources: i.e. good places for sea-angling, for  
- seasailing, power-boating, cruising, "messaging about in boats", boating, swimming in clean seawater  
- small attractive ports, with marina facilities and development potentials, that have attractive inns/pubs, eating places, seafood restaurants, etc.  
- secluded beaches for nude recreation

c) Inland water - based resources:  
- which lakes have clean water and are in attractive forested and/or farming countryside  
- which rivers are good, scenically attractive, have clean water, and are right for canoeing, for rafting, for "whitewater rides", for cruising and for angling ?  
- where do waterway systems exist, where you could develop water-cruising holidays?



- which water-related areas of attractive countryside, have good camping sites, and/or good caravan sites and/or good country-inns, or chalet sites?
- which water-related areas are suitable for nude recreation?
- d) Farming Areas:
  - which have, or could be suitable for development of farm-tourism, with countryside-related activities or countryside-sports.
- e) National Parks and Protected Areas of Quality Landscape:
  - with nature interest, wildlife and/or outstanding scenery, that could be appropriate places for ecotourism development (walking, riding, wildlife observation + photography.
- f) Mountains and extensive Hill Country:
  - probably forested, with good winter snows, and opportunities for skiing (down-hill, cross country), skating, winter and summer outdoor pursuits.
- g) Historic Tours:
  - which have appeal for cultural-tourism, and festival-event tourism, i.e. arts events, museums, built heritage interpretation, etc.
- h) Industrial Cities:
  - which have, or have the potential to develop general business-tourism, conference tourism, congress-tourism, or trade-fair development (as in Poznan).
- i) Archeological or Industrial Archeology Sites:
  - with potential for interpretation, presentation and proper development for tourism-use.
- j) Castles, Forts and Monasteries
  - which castles, forts or monasteries have a potential for the development of a system of



"paradores" or "pousadas"

k) Live Culture:

Where do you find Poland's living cultural assets - its performing orchestras, ballets, opera etc. and their halls, theatre which is not language constrained for the visitor, Jazz Festivals, Folk Music + Folk Dance Groups, Popfestivals and traditional fairs (such as the July Dominican Fair in Gdańsk) and of course - Cinema + TV Festivals.

l) Ethnic and Religious - Sites:

Where are the key:

- Catholic Pilgrimage Centres (in addition to Częstochowa)
- Sites of Jewish Historical Interest
- Sites of historic secular interest to Poles, Germans, Ukrainians, etc.?
- Sites of Kashubian, or other subcultural interest?
- "Górali" or mountain culture site interest?

m) Where are the quality vineyards (1 area only?) located?

n) Which are Poland's prime historical + architectural sites?

o) Where are golfcourses located and what areas are suitable for the development of additional courses?

2. INFRASTRUCTURE AND TRANSPORTATION:

a) Road System:

Where are Poland's motorways and better quality dual carriageways located? Do they have associated service - centres with petrol stations and catering? Where are the motels or road linked tourist information centres?

b) Rail:

What are the routes of Poland's mainline intercity service? Which routes are intended for high speed rail routes?

c) Bus:

Which long distance bus-routes are popular, and have further potential for expansion?



d) Air:

Which airports + airfields have potential for development of scheduled commercial flights or for use by charters?  
Which fields have potential for private flying?

e) Sea:

Which seaports and ferry-ports have potential for further development in terms of inward + outward tourist movements and cruise tourism?

3. TOURISM SUPERSTRUCTURE:

a) Where are hotel resorts, spa-resorts, seaside resorts and mountain resorts located, which can be adapted, renovated, modernised or expanded to meet modern demands/needs?

b) Gateway centres:

Where are the key strategic locations for gateway centres, where international tourists entering Poland can be welcomed, clear customs, find tourist information, catering, and shopping facilities (whether coming by air, road, rail or sea)?

c) Where are Active Sports Complexes - such as horse riding stables? gliding clubs, winter sports facilities, and country sports facilities (for shooting, fishing etc.).

d) Quality Accommodation:

Where are the 5 star high quality accommodation facilities?

e) Where are Poland's high quality (haute cuisine) restaurants found?

f) Where do you find value for money budget accommodation?

g) Where are the best existing Conference Facilities in Poland?

h) Where are the best existing Tourism Information Centres?

i) Where, in addition to Poznań, do you find major Trade Fairs?