Arthur D Little

National Tourism Product Development Plan

Final Report

Appendices Part I

State Sports and Tourism Administration
Warsaw

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Part I

Appendix 1: Worldwide tourism

Travel and tourism is the world's largest industry. On average, each year it:

- Generates a gross output of $ 3,5 trillion;
- Employs 127 million people;
- Produces 6,1% of world GNP;
- Invests $ 422 million in facilities and equipment;
- Contributes $ 303 billion of tax revenues.

Figure 1 reveals the industry's growing importance in these major areas over the last seven years.

Tourism has the greatest regional impact in EU member states and North America in all but one of these areas (see Figure 2). (Employment, the exception, is dominated by China, with 96 million in tourism-related employment.)

Further, the largest countries within these regions, US and Germany, have the largest tourist populations (41 and 74 million, respectively). The US attracts a nearly equal number of visitors (37 million), as does France (29 million French tourists; 24 million visitors). Germany, however, only attracts 15 million visitors.

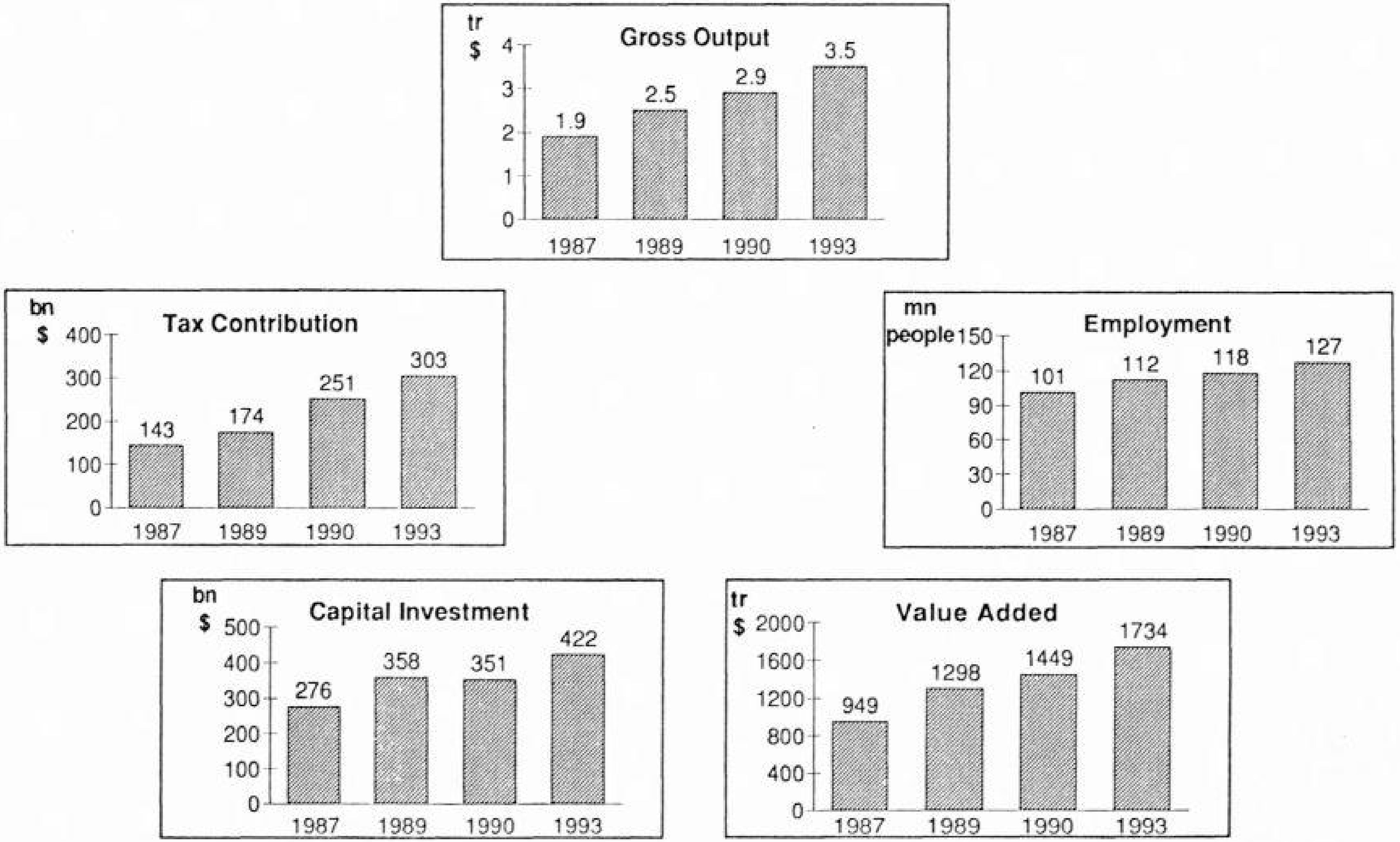
Other EU member states have disproportionate ratios as well. For example, Italy has a tourist population of 15 million, yet receives 55 million arrivals annually. On the other hand, the UK has a tourist population of 29 million and 16 million arrivals.

Price competitiveness is an important reason for this discrepancy in the case of Italy and the UK. According to a recent survey by the EIU, the UK is among the most expensive destinations for European travellers (see Figure 3). While Germany is judged inexpensive in the same survey, it has not rectified its imbalance in tourists/arrivals, in all likelihood due to its shortage of scenic attractions.

Currently the US is the only country where domestic receipts and foreign spending are roughly equal ($ 34 billion vs. $ 35 billion). All other major destinations show similar disequilibrum between receipts and spending. For example, German and UK tourists spend more abroad than receipts generated by visitors. France, Italy and Austria take in more receipts than their tourist populations spend abroad.

Figure 1

Development of major tourism parameters



Source: WTTC

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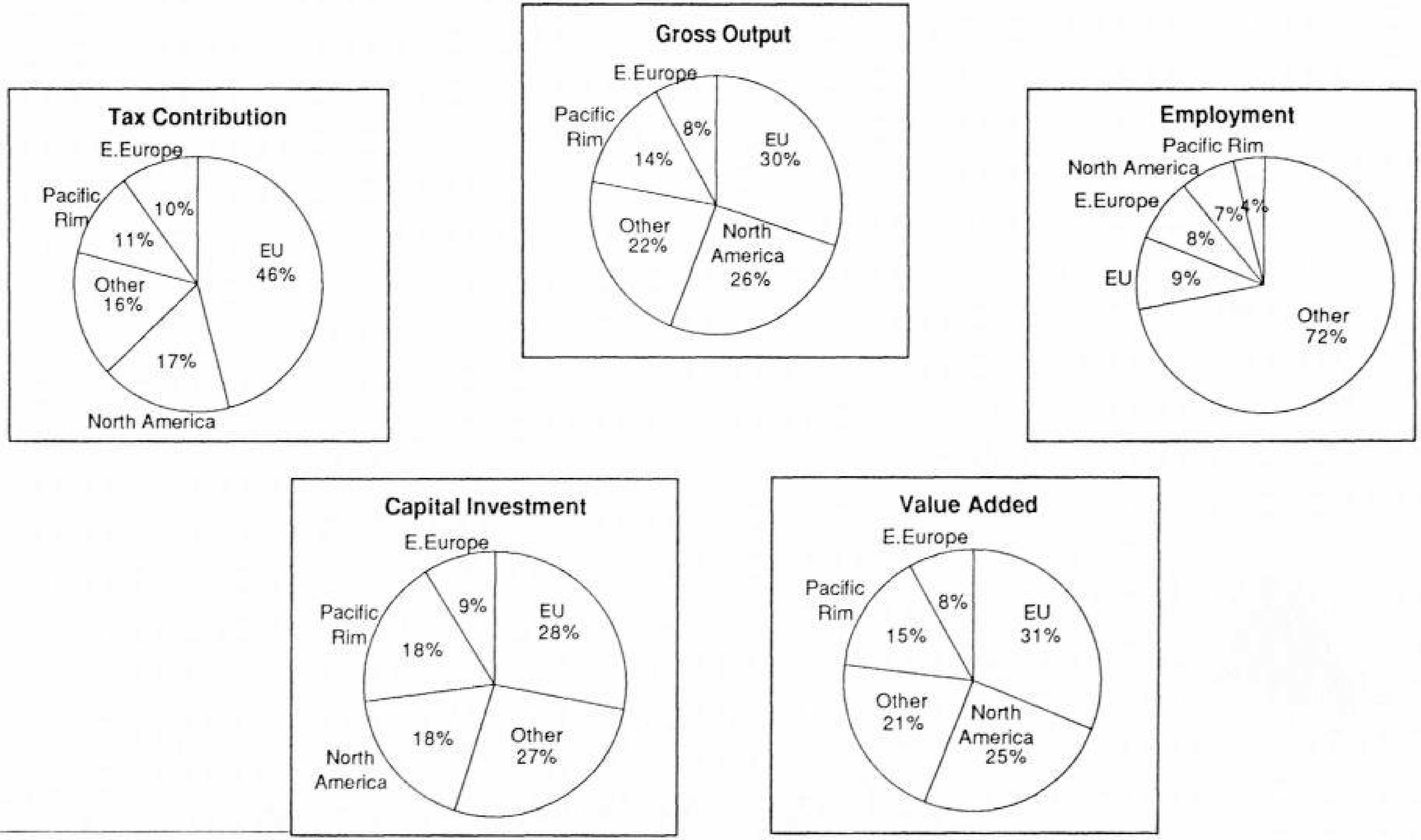
Figure 2

Regional split of tourism impact



Source: WTTC 1994 estimates

Figure 3

Price competitiveness

	Short-haul touring holidays
	Independent travel
Austria	◑
Belgium	◑
France	◑
Germany	◔
Ireland	◕
Italy	◑
Netherlands	◔
Portugal	◔
Spain	◔
Switzerland	◕
UK	●

Note: comparison of inclusive tours not available

	Short-haul city breaks	
	Independent travel	Inclusive tours
Vienna	◕	◕
Bruges	◔	◕
Prague	n.a.	◔
Copenhagen	◕	◕
Paris	◕	◕
Athens	○	◔
Rome	◕	◕
Amsterdam	◔	◑
Lisbon	◔	◑
Madrid	◑	◕
London	◕	◑

Note: very cheap ○ ◔ ◑ ◕ ● very expensive

Source: EIU

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1.1 Forecasts of tourism development

Using historical trends, the WTTC has extrapolated tourism data to 2005. As always with extrapolations, all data must be treated with caution, as changes in external conditions can alter results considerably.

The global tourism industry's output ($3,5 trillion p.a.) is estimated to grow to $9,7 trillion by 2005, an increase of more than 270%. This increase is due on the demand side to a tripling of business and government spending and a very substantial increase in household spending.

On the supply side, wages, taxes, investment and profit are forecast to increase proportionally. Also the employment numbers will grow from the current 127 million to 157 million (+23%).

Figure 4 illustrates the current and future size of the demand and supply sides of tourism.

The 402 million trips taken globally (excluding day-trips) in 1989 are expected to increase to 617 million by 2000. The greatest growth will take place in Europe; the number of trips will increase by a substantial 61%, to 445 million. North America will generate growth of around 10%. All increases in domestic trips will more or less match increases in trips to these countries as destinations.

Both domestic and international tourism spend are also forecast to increase considerably.

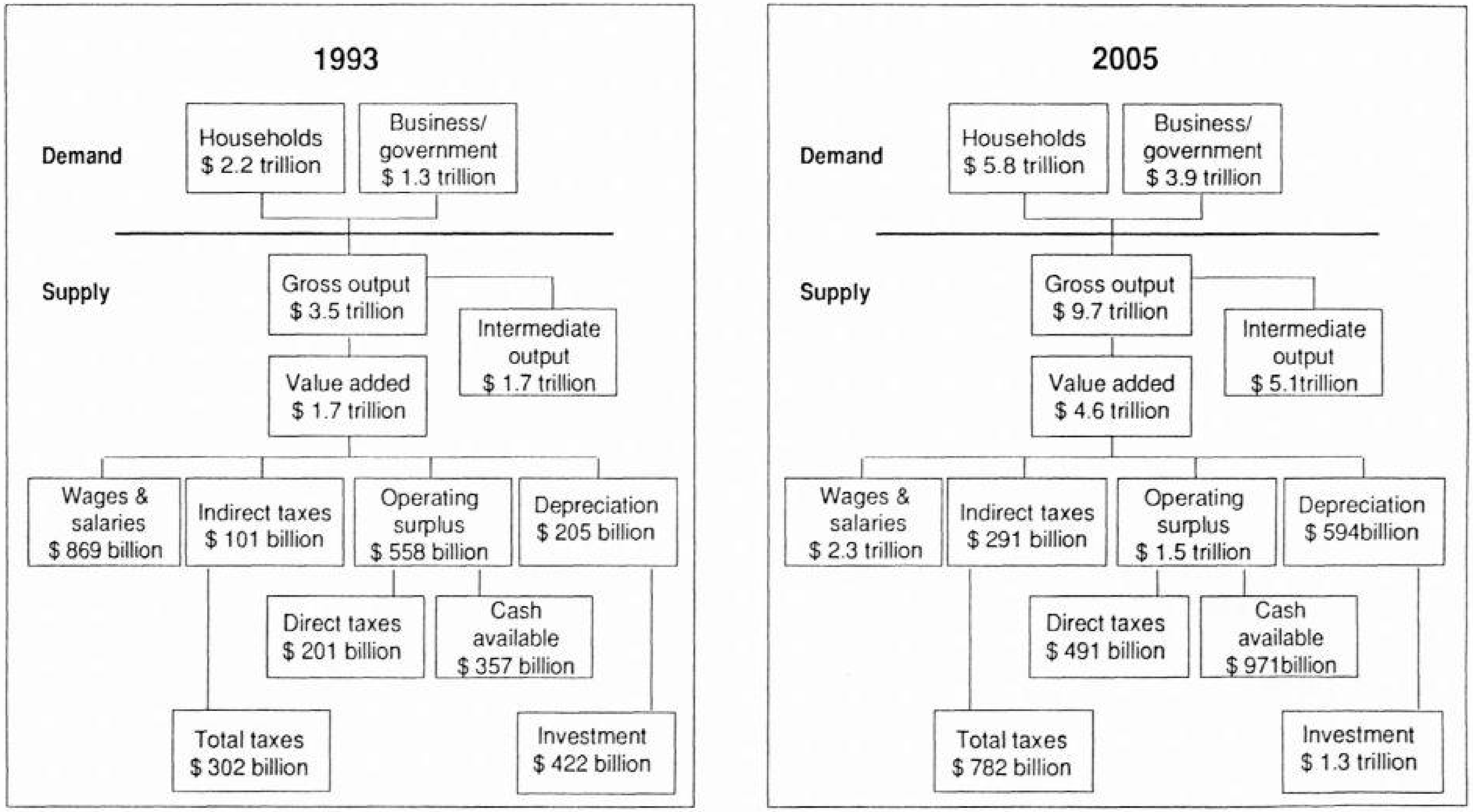
Only the US is forecast to substantially change its receipts vs. spendings pattern; receipts are expected to be 30% higher than spendings in the year 2000. In Germany, the current gap between receipts and spendings (receipts 40% of spendings) is expected to grow significantly (receipts 30% of spendings). The other European markets are expected to see increases in both factors and continuing discrepancies between them (see Figures 5 and 6).

1.2 Industry trends

All players in the industry--service providers (airlines, hotels, railroads, etc.); distributors (tour operators, travel agencies, computer reservation systems); customers (leisure and business travellers); and support services (air traffic control systems, credit cards, equipment suppliers, regulatory agencies)--are currently undergoing fundamental and unprecedented changes.

Figure 4

Demand and supply sides of tourism 1993 vs. 2005



Source: WTTC

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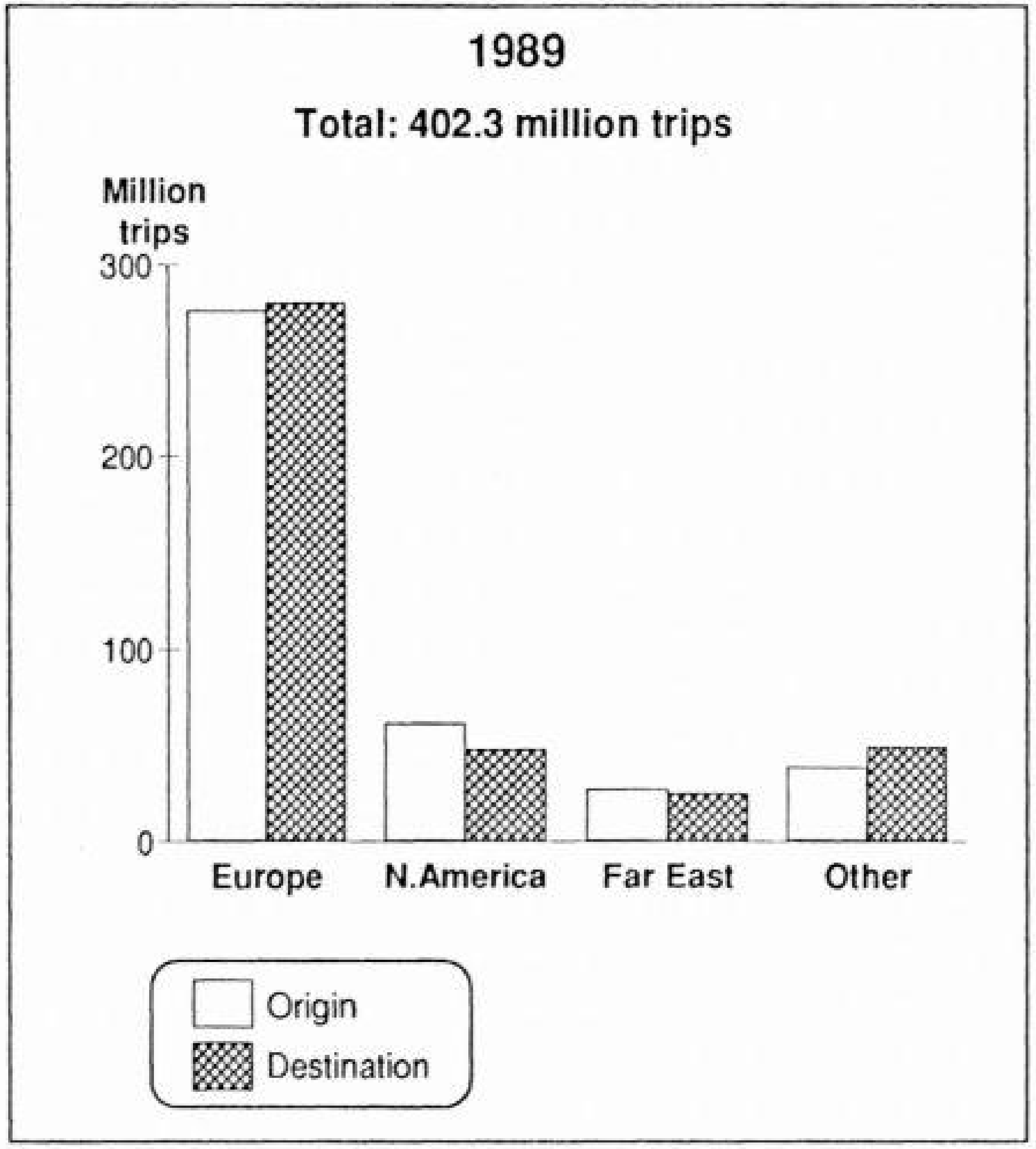
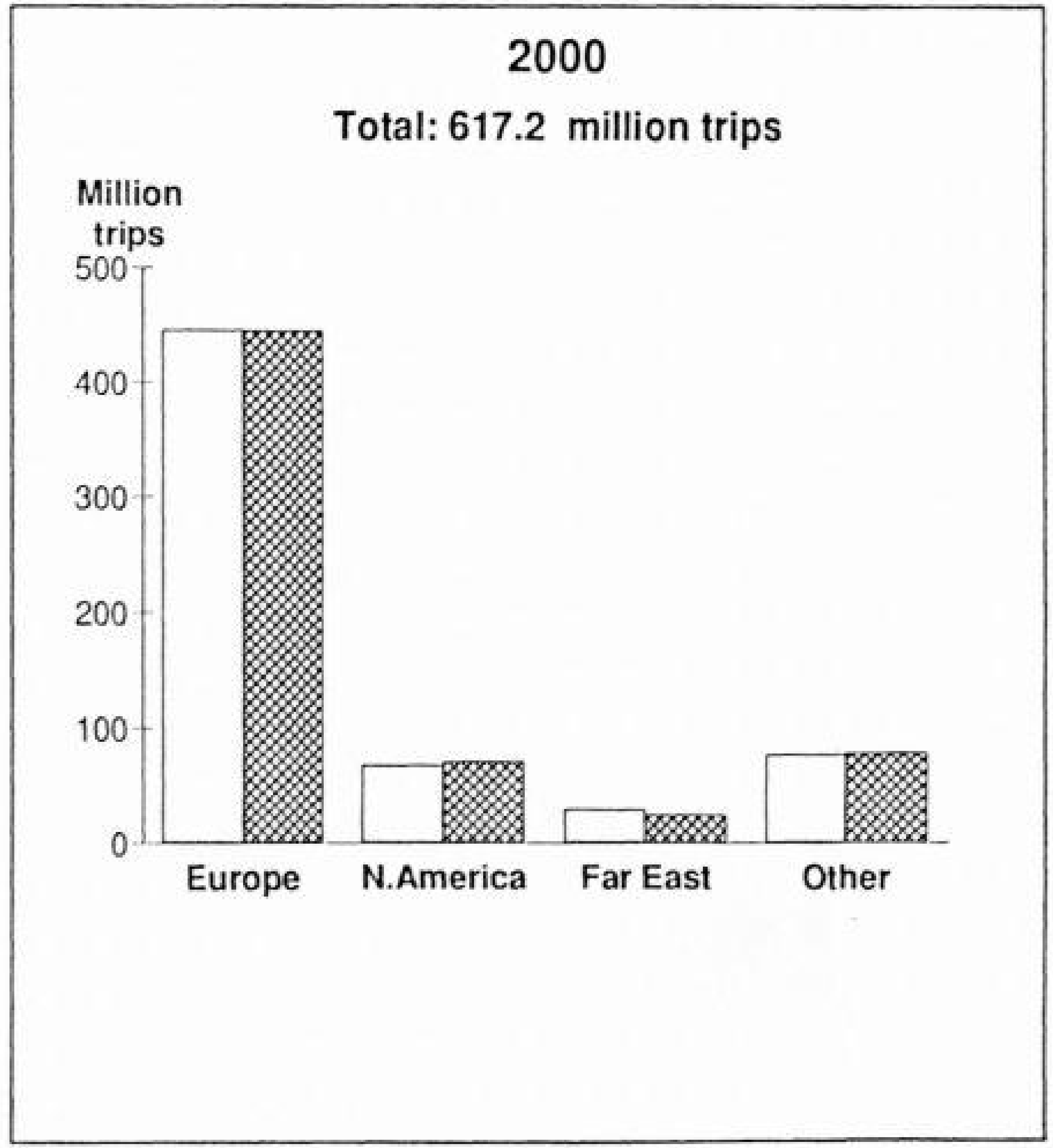
Figure 5

Regional split of trips 1989 vs. 2000

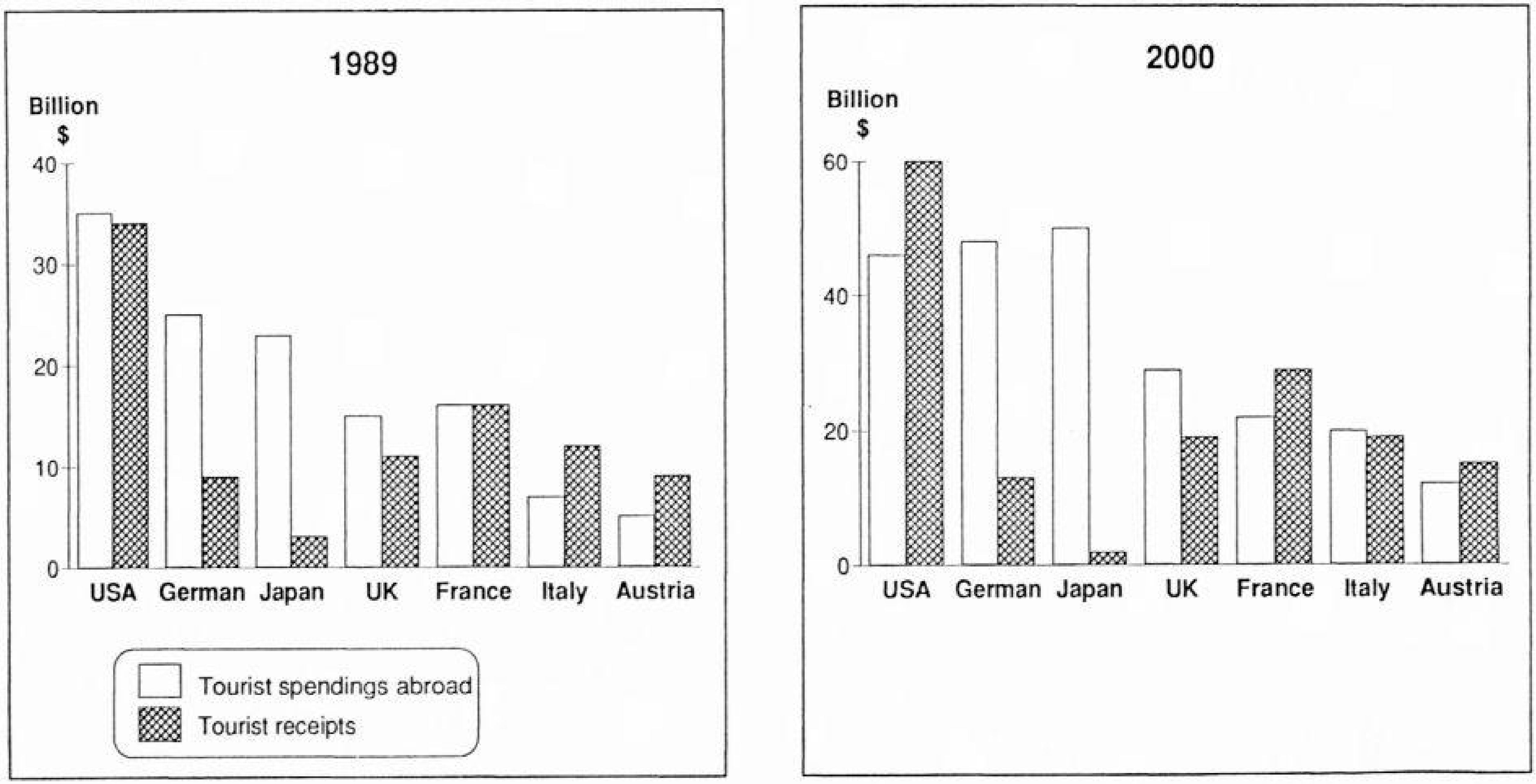




Source: EIU

Figure 6

Country split spendings/receipts 1989 vs. 2000



Note: All amounts at constant 1989 prices and exchange rates
Source: EIU

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Service providers are facing consolidation and globalisation. Taking airlines as an example, all European airlines are building up alliances or even formal cross-ownership structures with former competitors to leverage economies of scale in fleet size, maintenance costs, administrative burdens, etc.

Distributors are confronted with the threat of becoming obsolete in the near future, when customers can book directly with service suppliers. The development of user-friendly computer reservation systems accessible at home well illustrates this threat. Today, tour operators are already trying to bypass travel agencies and communicate directly with customers. Similarly, travel agencies are trying to get into the tour operator business and do the packaging of travel arrangements themselves.

In Germany several large tour operators like NUR or TUI are already selling their products directly to customers, thus bypassing travel agencies. The most common way of doing this is by offering telesales, i.e. selling by telephone. Tour operators can save the commission for agencies and can also target new customer segments.

Non-traditional players are also entering the market. Major mail-order houses like Quelle and Otto have recently started to include travel in their product portfolio and sell it also by phone. These companies can leverage their well-developed information technology capabilities and could become fore-runners of travel distribution of the future.

As both business and leisure customers become more sophisticated and discerning, they will increasingly seek value-for-money in their travel arrangements. Corporate clients, while seeking global coverage from their travel agents, will also seek more individual service from them.

Leisure travel will grow faster than business travel. Although Europe and the US will remain the dominant origin markets, other origin markets will develop rapidly. The number of people taking second and third holidays in a given year will increase. Lifestyle tours, variations around a given theme, are expected to become more popular as well.

Support systems are involved in all the above-mentioned developments. Some of these companies are planning to become major players in the tourism industry themselves.

In addition, video-conferences and virtual reality applications will influence the industry strongly in the near future and might change the individual travelling pattern significantly. The consequence of these new technologies might be a significant reduction in travel because:

- Video-conferences provide a hassle-free, time-saving and cost-effective way of communication, making physical changes of location for the individual unnecessary.
- Virtual reality applications, such as deep sea diving or skiing, could become attractive substitutes for real trips.

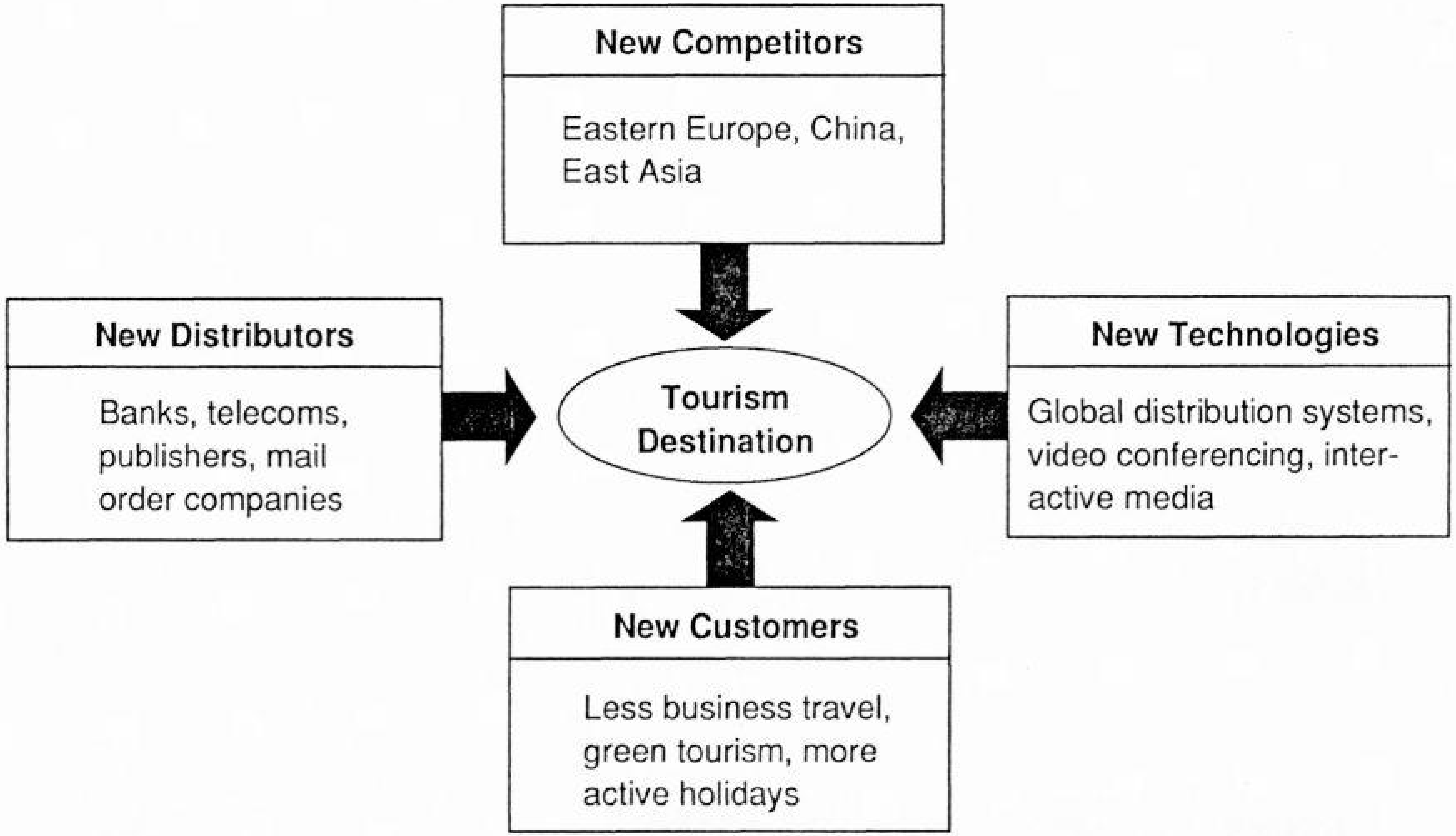
All trends described strongly influence the discrete tourism destination. New competitors, new technologies, new distributors and also new customers will have an impact on how destinations attract and grow market share. Figure 7 illustrates these challenges.

Policy makers and implementors will need to react to these challenges by adopting a stronger customer orientation. Competitive and target-oriented tourism products will have to be developed. Incentives, subsidies, regional policy measures, and infrastructural development activities are measures that can be applied to develop these products.

In addition, these policy makers and implementors need to communicate more effectively with the world-wide travel industry and develop audience-focused promotion materials.

Figure 7

Challenges for tourism destinations



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Appendix 2: Current Polish product offer and tourism industry evaluation

2.1 Tour operators' current offer

Arthur D. Little evaluated a sample of about 70 brochures (Figure 1) offered by international tour operators to determine how Poland is sold and perceived as a tourist destination. Not surprisingly, German tour operators offer the most extensive programme on Poland, which includes:

Three-to-15 day bus tours of Poland for sightseeing are the most common product offered. This product includes bus ride, hotel accommodation, food (mostly half-board) and a tour guide; sometimes the entrance fees to museums, etc., are also included. The routes nearly always include the major cities and the Mazury Lake District.

Religious-oriented trips are offered as a sub-category of bus tours. The only difference between these and general tours is the visits to religious sites, e.g. Częstochowa, Kraków, Lublin. However, these destinations are often also part of the general tours.

Hotel-only and self-catering villas/apartments for relaxation purposes are the next most popular products. Nearly all such villas are located either in the Mazury Lake District or on the Baltic coast. Tour operators indicated that the quality of these villas does not always meet Western standards or expectations. Wooden villas consisting of only one 25m^2 room are difficult to sell to Western tourists. ORBIS is believed by tour operators to have a quasi-monopoly on higher quality villas.

Simple transport by plane, bus, or train is often bought in combination with hotel-only. Target groups are business people and emigrants. Air fare to Poland from major European cities currently offered by LOT was thought too high by tour operators.

All other special interest products, such hunting, biking, hiking, fishing, horseback riding, sailing, etc., are modifications of the bus tour and relaxation products and do not play a major role overall. These products are either integrated into a bus tour, or are added to the hotel-only product.

Figure 1

Tour operator brochure analysis

Market	Mainstream Operator	Niche Operator	Polish Specialist
Germany	• Deutsche Touring • Eller • Kipferls • NUR • OTS • TUI • Wolters	• Bayerisches Pilgerbüro • DNV • Fit • Intercontact • Kettner • Lechner • Nees • Novasol • Studiosus	• Albis • Darpol • Dettermann • Imken • Kästl • Wolff
Benelux	• De Jong • Holland International • Hotelplan • Kras • Oad Reizen • Vernu	• Anders Reisen • Escape Sports • Europabus • Interhome	• Polorbis
UK	• Gulliver's	• Inter-Church • Fregata	• Polorbis

Figure 1 (continued)

Tour operator brochure analysis (continued)

Market	Mainstream Operator	Niche Operator	Polish Specialist
France	• Europauli • Jettours • Nouvelles Frontières • Transtours	• Nouvelle Liberté • Ringtours • Tourisme Français	• Lepertours • Pharest • Polorbis
Italy	• Comet • Ivet	• Estland • Turisanda	• Altro Volo
USA		• Isram World of Tavel • Maupintour	• American TravelAbroad • General Tours • Orbis National Travel Bureau
Austria	• Austrobus • Ruefa • Union	• Dr. Maiers	• Austro-orbis
Scandinavia	• Eagle Tours • Top Club • Vindrose Rejser	• Team Travel	• Polorbis

Skiing is not offered very much and, if at all, hotel-only is the product. Tour operators stated that the quality of skiing slopes, lifts, and accommodations is not satisfactory. In addition, the Slovak part of the Tatra Mountains is considered more touristically developed and more scenic than is the Polish part.

City breaks (weekend trips to a city) are offered, but tour operators indicated that the demand for this product is rather low. The more popular alternative is to visit several cities on a shorter version (four days) of a bus tour.

Figure 2 shows examples of German offers.

The supply model identified in Germany was also found in the other markets researched. The major difference was transportation used. Instead of the bus as transport medium for the entire journey, a combination of flight and bus is used from more distant source markets. From Scandinavia, ferries are also used.

Tour operators from Benelux offer Poland as hotel-only. "Theme trips" like Chopin Week or staying in medieval castles are also offered in these countries.

Tour operators from the United States often combine the trip to Poland with other countries, mainly the Czech Republic, Hungary, and sometimes Austria and Germany.

2.2 Industry evaluation of Polish tourism

We conducted a sample of 30 interviews (Figure 3) with international tour operators to determine the main barriers to successful development of high-quality tourism in Poland. These barriers include:

- Missing or low-quality infrastructure, e.g. hotels, facilities, roads;
- Missing or underdeveloped infrastructure for special interest tourism;
- Low awareness of Poland as a tourism destination;
- Low security for tourists;
- Weak service mentality (guests are sometimes seen as a nuisance);
- Language.

Despite these constraints, tour operators agree that Poland as a tourism destination has not yet seen its peak.

Figure 2

Poland offer by German tour operators

Germany

Segment	Segment size	Product type	Days	Price ($)	Spend ($) p.p.p.d.	Tour operator	Growth potential of segment
Sightseeing		Bus tour	6 - 14	400 - 1,500	30	DNV, OTS, TUI, Wolff, Walters, Eller, Kipferl, Studiosus, Kästl	
Relaxation		Hotel only/ self-catering villas	Mostly per week	140 - 450 per week per villa	20 - 40	Wolters, NUR, TUI, Novasol, Darpol	
Roots/Heritage		Hotel only Flight only Bus only Bus tours	Depends	Depends	30	Orbis, Deutsche Touring, Darpol, Polen Reisedienst	
Biking/Hiking		Combination of bus tour and hiking/biking	8 - 14	600 - 1,600	30	Studiosus, TUI, Polen Reisedienst	
Hunting		Accomodation in hunting lodges, guides, transport	7	Tailor-made	Depends on hunting fee	Lechner, Kettner	
Pilgrimages		Regular bus tours highlighting religious sites	4 - 8	400 - 600	30	Bayerisches Pilgerbüro, Wolff	
Fishing/Horse-back riding/ Scuba diving		Hotel only	7 - 14	300 - 800	30	Polen Reisedienst	

Note: Orbis offers programs for all segments
Source: tour operator interviews/analyses

very small … very big

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Figure 3

Tour operator interviews

Mainstream operator	Niche operator	Polish specialist
• Austrobu	• ChassOrbis	• Altro Volo
• Comet	• Estland	• American TravelAbroad
• Deutsche Touring	• Isram	• Darpol
• Gulliver's	• Kettner	• General Tours
• tIvey	• Kettner Fance	• K°astle
• NUR	• Maupintour	• Lepertours
• Ruefa	• Procure La Terre Entiière	• Orbis
• TUI	• Service des Pélerinages	• Pharest
• Union	• Studiosus	• Polen Reisedienst
	• Turisanda	• Wolff
	• VO Voyages	• Wolff Italia

Interviewees believe that new and/or refurbished products are needed immediately to overcome these constraints and meet tourist expectations. They identified a number of products to overcome these constraints, such as 2- and 3-star hotels and entertainment facilities, better bus and hotel taxi services, and more border crossings (see Figure 4).

Poland's competitive position, based on the views expressed to use by foreign and domestic tourists, doemestic facility owners/operators and foreign investors and operators is expressed in Figure five to eight. We provide a weighting of the importance of perceived key success factors, where 1 indicates no importance and 10 strong importance.

Figure 4

Suggested measures to overcome constraints

Measures

Core Product

- Construct 2*-3* hotels
- Refurbish old hotels
- Construct self-catering apartments
- Refurbish self-catering villas to Western standards
- Develop holiday camps/resort-type hotels
- Establish rest facilities along highways
- Construct entertainment facilities

Product Attributes

- Increase service level/mentality
- Launch language courses for service staff
- Increase variety of food offered
- Use German names of towns for German tourists
- Lower entrance fees to museums/ sites
- Increase number of buses privately available
- Increase number of hotel taxis available to guests

Infrastructure

- Increase train/flight/bus connections to/within Poland
- Increase number of border crossings for car tourists
- Establish local information centres
- Improve signage to find hotels
- Improve major highways
- Establish computer reservation systems
- Increase security (cars, buses, people)
- Disconnect Sports and Tourism Authority

Focused and intense image campaign in major source markets to support all other activities

Source: tour operator interviews

Figure 5

Competitive position of Polish tourism as viewed by foreign tourists

Key Success Factors	Importance Weighting	Polish "score"
• Outstanding attractions	10	◑
• Competitive access airline tarifs	9	○
• Good hassle-free airports		
- Warsaw	8	●
- Regions	5	○
• Value-for-money hotels/experience	10	◔
• Friendly welcoming people	8	◕
• Developed service culture	8	○
• Good ground transportation	8	○
Good domestic air transportation	4	◔
Good train transportation	8	◑
• Acceptable food for Western tourists	8	○
• Good shopping		
- availability	7	◔
- price	7	●
• Good standard entertainment/recreation	6	○
• Competitive exchange rate	7	●
• Personal safety and security	7	◔
• Unthreatening offical dom	6	◔
• Satisfactory health/medical facilities	4	◔

Legend : ● Excellent Polish competitive position
○ Extremely poor Polish competitive position

Figure 6

Competitive position of Polish tourism as viewed by domestic facilities owners/operators

Key Success Factors	Importance Weighting	Polish "score"
• Good local demand	6	●
• Purchasing power	7	○
• Reliable partners and venture capital	8	○
• Attractive financial incentives	10	◕
• Suitable training/staff/education	10	○
• Effective promotion marketing		
- Poland	10	◔
- Region	10	○
• Suitable grading of facilities	5	○
• Good telecommunications	8	◑
• Competitive terms of credit	10	○
• Efficient/sympathetic banks	10	○
• Competitive tax/regime		
- Principles	5	◕
- Application	10	○
• Compliant/supportive labor unions	6	○
• Honest officials	8	◔
• Ease/speed of authorisation	8	○
• Clear responsibilities for tourism (national/regional/local)	8	○
• Initiatives to extend seasons	10	○

Legend : ● Excellent Polish competitive position
○ Extremely poor Polish competitive position

Figure 7

Competitive position of Polish tourism as viewed by foreign investors and operators

Key Success Factors	Importance Weighting	Polish "score"
• Good potential demand (after economic recovery)	10	◕
• Favourable foreign investment law	10	●
• Reliable trustworthy local partners	8	◔
• Efficient/fair legal system	8	◔
• Western audit standards	8	◕
• Ease/speed/equity of authorisations	8	◔
• Competitive exchange rate	8	●
• Skilled labour/training		
- Construction	10	◔
- Service	10	○
• Low-cost labour	8	◕
• Availability of tax, investment incentives	6	◕
• Availability of local capital	5	◑
• Efficient (international) banks	8	●
• Clear national tourism policy and promotion	10	◔
• Low, equitable taxes and duties	8	◑
• Efficient foreign representation/distribution	8	◔

Legend : ● Excellent Polish competitive position
○ Extremely poor Polish competitive position

Figure 8

Competitive position of Polish tourism as viewed by domestic Polish tourists

Key Success Factors	Importance Weighting	Score now	Score in 3 years
• Interesting attractions/regions	8	◑	◑
• Affordable facilities	10	◔	◕
• Acceptable quality facilities/experience	8	◔	◑
• Acceptable service levels	4	◑	◕
• Efficient transportation			
- Road	8	◑	◑
- Train	8	◑	◑
• Interesting entertainment/recreation facilities	4	○	◔
• Easy information about destinations	8	○	◑
• Efficient reservation/ distribution systems	8	○	◑

Legend : ● Excellent Polish competitive position
○ Extremely poor Polish competitive position

Appendix 3: Poland's attractions

Based on the work of the Institute of Tourism, we analysed and classified the attractions Poland has to offer to indicate the richness and variety of its natural resources.

3.1 Natural attractions

3.1.1 Forest areas and parks

About 22% of the surface area of the country, or 70,000 km^2, is forested and suitable for recreation. Of particular interest are forests that lie in lake, seaside, and mountain regions: Puszcza Augustowska, Borecka, Drawska, Goleniowska, Karpacka, Notecka, Piska, Rzepińska, Sudecka, Wkrzańska and Bory Tucholskie.

Poland has 17 national parks, covering more than 150,000 hectares, 100,000 hectares of which are forest. Fifty-three landscape parks cover an area of one million hectares. Due to the current state of the environment, almost 30% of this area cannot be used recreationally.

Białowieski National Park is cited on the World Biosphere Reserve List, for special ecological interest, as is Słowiński National Park, located near Łeba (mobile sand dunes).

3.1.2 Mountains

The most attractive mountain areas are Tatry, Karkonosze, and Góry Stołowe (Table Mountains), Masyw Śnieżnika, Beskid Zywiecki, Beskid Sądecki, Gorce, Bieszczady and Poland's oldest range, Góry Świętokrzyskie (Holy Cross Mountain).

The Tatras range provides excellent climbing and cave-exploration opportunities. The capital of Tatras, Zakopane, is a starting point for many trails leading into the mountains. Raft runs are floated down Dunajec River through the Pieniny, a mountain range next to the Tatras.

Góry Świętokrzyskie is overgrown with forests and has wilderness areas with numerous grottos and caves. Bieszczady is a fine area for hikers, although tourist facilities are not developed.

3.1.3 Lakes and rivers

Poland's lakelands consist of postglacial lakes, hills, and forests. There are 4,500 lakes with an area of over five hectares; 30 man-made water resources; 70 rivers totalling 7,800 km. Of these water bodies, 600 lakes, totalling 3,300 km^2 and 1,700 km of rivers are suitable for water recreation and sports.

The main lake districts are the Great Mazurian Lakes, Kaszubian, Drawskie, Iławskie, Olsztyńskie and Suwalskie, including Dadaj, Drawsko, Jeziorak, Łubie, Łańskie, Raduńskie, Wdzydze, Wigry, and Śniardwy and Mamry which, together with Bełdany, Nidzkie and Roś, form a unique connected water system, with a surface over 300 km^2.

Charzykowskie is another interesting lake outside the lake districts.

Some of Poland's natural attractions are man-made: bodies of water such as Koronowski, Rożnowski, Soliński, Czorsztyński, Dobczycki, Otmuchowski and Sulejowski offer 118 water tourism trails (including 30 for sailing), totalling 11,500 km in length.

Fifteen trails located in the Great Mazurian Lakes, Jeziora Iławskie, Jeziora Brodnickie are of international class. Among the most beautiful trails in Europe for kayak runs are the Dunajec, Poprad, and San mountain rivers. They wind through forests and flow into lakes that are connected with the Brda, Czarna Hańcza, Drawa, Krutynia, Pasłęka, Radunia and Wda rivers.

Also of interest are monuments of 19th century engineering, namely, Kanał (Canal) Augustowski, 100 km long, linking Wisła with Niemen; Kanał Elbląski, 67 km long, linking Wisła Bay with Iława Lakes; and Biebrza, which is routed through large marshes and wilderness.

3.1.4 Coastline

Poland's 520-km Baltic coastline is sandy; the air is high in iodine. The best known seaside resorts are: Świnoujście, Międzyzdroje, Kołobrzeg, Ustronie Morskie, Darłowo, Ustka, Łeba, Jastrzębia Góra, Władysławowo, Jastarnia, Hel, Sopot and Krynica Morska.

3.1.5 Health resorts and spas

There are 37 certified health resorts in Poland, and 25 are under development. Sixty other areas have potential as health resorts, mainly due to their large resources of thermal waters. Construction of natural hot water pools offers good potential, due to Poland's unfavourable weather conditions, and would extend the outdoor bathing season from May to October (see Figure 1).

Figure 1

Examples of health resorts/spas

0 - unique in Europe

I - very good

The largest thermal water resources are found in Sudetes, near Poznań, Łódź, and Warsaw, and in Podhale (highland near Tatras). Of 96 thermal water springs, only 18 are used. The springs in Gdańsk, Frombork, Swarzędz, Środa Śląska, Uniejów, Łódź, Wilga, Trzebnica and Bańska can be easily exploited.

3.2 Historic and cultural attractions

The most important monuments in Poland are presented in Figures 2 and 3. We have categorised the main attractions as follows :

- Historic cities: Cities with historic attraction have either international or domestic tourism importance. They include big centres such as Gdańsk, Kraków, Poznań, Toruń, Warsaw, Wrocław, and about 100 other localities,
- Old town complexes;
- Old wooden architecture;
- Castles and palaces;
- Religious shrines;
- Museums: There are 550 museums in Poland, of which at least 30 have large permanent or special collections.

3.3 Cultural events

Polish cultural life is diverse but underexplored by tourists. Towns like Kraków, Warsaw, Poznań, Wrocław, Gdańsk, Łódź are of special interest in this context .

Modern/alternative art events are organised in Warsaw (Centre of Contemporary Art) , Łódź (Modern Art Museum), and in Kraków, Wrocław, and other university centres.

Cultural festivals which, due to quality of performance and the international language of music and dance, could attract foreign tourists include:

- Music Festival in Łańcut (May);
- International Book Fair - Warsaw (May);
- Festival of Organ Music - Toruń (May - July);
- Festival of Jewish Culture - Kraków (June);
- Warsaw Summer Jazz Days - Warsaw (June);
- Festival of Old Music - Stary Sącz (June/July);

Figure 2

Examples of historical towns

Figure 3

Examples of castles and palaces

- Festival of Organ & Chamber Music - Kamień Pomorski (June - September);
- Beskidy (Highlanders') Culture Week (folk music etc) - Wisła, Żywiec, Szczyrk, Bielsko-Biała (August);
- Mozart Festival in Warsaw, comprising all of his operas and many of instrumental works (July - August);
- International Festival of Street Theatre - Jelenia Góra and Kraków (August)
- International Chopin Festival - Duszniki Zdrój (August);
- International Festival of of Youth Orchestras "Eurorchesters" - Świeradów Zdrój
- "Tatra Autumn" International Festival of Highlanders' folk Music - Zakopane (August);
- "Wratislawia Cantans", International Festival of Oratoriums and Cantates - Wrocław (September);
- International Festival of Contemporary Music "Warsaw Autumn" - (September);
- "Musica Antiqua Europea Orientalis" - Bydgoszcz (September);
- International Jazz Festival "Jazz Jamboree" - Warsaw (October);
- International Chopin Piano Competition - Warsaw (organised every four years).

3.4 Special-interest/activity tourism

The Polish Society of Touring and Tourism (PTTK) plays a significant role in the country's active tourism attractions. It sponsors a number of specialized clubs, for example, in kayaking, sailing, speleology (cave exploration), riding, etc. The PTTK also organises training of instructors, runs shelter houses and riverside hostels, rents sport/tourist equipment, issues guides, marks trails, and runs tourist libraries.

The Society for the Propagation of the Physical Culture in Poland has 600,000 members. There are over 1,800 stadiums, 300 indoor and 600 outdoor pools, and 100 skating rinks in Poland. Many of them, however are open only to sport club members, so are not normally available to tourists.

Numerous municipalities own City Centres of Sport and Recreation, many of which are in small towns. These Centres are comprised of large playing fields, gymnasiums, tennis courts, and quite frequently a pool, café, and small hotel. Such centres are used mainly by town residents, but sometimes also attract tourists. We have selected a few areas we consider have good potential for the promotion of special interest/activity tourism (see Figure four).

3.4.1 Water sports

Some water sports tourism areas are of international importance:
- Great Mazurian Lakes with Lake Śniardwy (114 km^2);
- Mamry lake (104 km^2);

Figure 4

Examples of sport holiday centres

Arthur D Little

- Niegocin (26 km^2).

Lake Wigry (22km^2), Lake Jeziorak near Iława and Ostróda, and Wisła Bay also have the potential to be promoted. The latter would become an attractive sailing area after the opening up of the Królewiec (Kaliningrad) region of Russia.

Fifteen trails for various water sports are of international class. They are located in the Great Mazurian Lakes, Jeziora Iławskie, and Jeziora Brodnickie.

Sailing is a popular activity at lakes, in the Szczeciński and Wiślany bays, and at man-made water resources such as Włocławski (70km^2), Soliński (21 km^2) and Zegrzyński (33 km^2).

Training and sport centres for sailing are in Trzebież (Szczecin Bay) Gdańsk/Gdynia (Gdańsk Bay), Wilkasy, Giżycko, Sztynort, Mikołajki (Great Mazurian Lakes) and Zegrzynskie Lake (near Warsaw).

Wisła Bay and Pucka Bay are relatively unknown but good for wind surfing -- strong and regular winds, 200 meters of shallow water.

3.4.2 Winter sports

Centres for the best known winter sport, skiing, are in the Carpatians: Zakopane, Bukowina Tatrzańska (Tatras), Szczyrk, Brenna, Wisła, Korbielów (Beskides), and the Sudetes: Szklarska Poręba, Karpacz, and Zieleniec. Two sites offer advanced skiing : Zakopane and Szczyrk, with ski jumps (110m, 90m) and certified slalom and down-hill slopes.

The best conditions for skiing are in Tatras. Development of skiing facilities, however, has stopped due to conflicts between skiers and environmentalists over use of the landscape. A similar conflict exists in Bieszczady.

Analysis of Poland's natural assets shows that development prospects are best near Kłodzko (slopes of Śnieżnik Mountain) and in the vicinities of Szczyrk and Korbielów (Pilsko Mountain).

Cross-country skiing is available in the highlands, in the Suwalskie, and Kaszubian Lakeland. Much work could be done to prepare cross-country trails in the Northern regions of Poland to promote this growing skiing segment.

All major winter sports centres have equipment rental shops. The number of ski lifts (T-bars, J-bars, chair lifts, gondolas) is insufficient. There is no extended system of lifts, so many slopes are under-utilised.

3.4.3 Hiking and climbing

Mountain hiking is the most accessible form of activity tourism. It requires no special equipment and can be done as a family activity. It is divided into two groups:

- Stays in mountain resorts (Zakopane and vicinity in Tatras; Karpacz, Szklarska Poręba, Kudowa, Polanica, Duszniki in Sudetes; Wisła, Szczyrk, Szczawnica, Krynica in Beskides) including one-day foot excursions;
- 10 or more days hiking through Bieszczady, Sudetes, and Beskides.

The most popular areas for cross-country hiking are in the Lake Districts (Suwalsko-Augustowskie Mazurian and Pomorskie); large forest regions (Notecka, Tucholskie, Knyszyńska, Dolnośląskie, Solska), and regions with many historic attractions (Silesian Castles and trail of "Eagle Nests", etc).

The Tatras, with its alpine terrain, provides interesting climbing opportunities, as do some parts of Sudetes (Karkonosze and Góry Sokole) and Jura Krakowsko Częstochowska.

3.4.4 Cave exploration

Opportunities for cave exploration and study abound in Poland and are worth promoting. The Western Tatras have over 400 caves. Some of them, including the deepest, Jaskinia Śnieżna (the Snow Cave) and the longest, Bandzioch Kominiarski, are of international importance. One thousand caves are found in Kraków-Częstochowa Upland. The Jaskinia Raj (Paradise) cave located near Kielce and Jaskinia Niedźwiedzia (Bear) in Sudetes have public access and are great tourist attractions. Apart from the Tatras, climbing sites are located in some parts of Sudetes (Karkonosze and Góry Sokole) and Jura Krakowsko-Częstochowska.

3.4.5 Other activities

Poland has resources to develop several other tourism activities.

3.4.5.1 Riding

Most stud farms and riding centres in Poland are modern. They are often located on old palace lands or manors, and offer accommodation, full board, expert instructors and indoor enclosure, as well as riding grounds situated amidst lakes and forests.

3.4.5.2 Angling

The main angling areas are in the Lake Districts and rivers of Western Pomorze. Fishing licences are provided by branch offices of the Polish Anglers Association. As far as we can determine, none of the tour operators and only a few holiday centres offer products at this time.

3.4.5.3 Nature-oriented active tourism

Poland has good opportunities to develop several kinds of active, nature-oriented tourism.

- Photo safaris - arranged by Foreign Tourism Bureau of PTTK in Biebrza Marshes, some parts of Great Mazurian Lakes, the largest forests, and Bieszczady.
- Survival -- exercises held in Biebrza Marshes and Romincka Forest.
- Ballooning -- available in Białystok and Poznań. Some small tour agencies provide the relevant offer for amateurs.
- Hang gliding - -there are well known gliding centres in Leszno, Miedzybrodzie Zywieckie and Jelenia Góra. This sport could bring sizeable revenues if it is promoted.
- Golf -- at present there are three golf courses in Poland. A couple of golf courses are in preparation near accommodations and facilities used by foreign businessmen.
- Mushroom and berry picking -- in the Ziemia Lubuska area.

List of Attractions

1. Natural attractions

1.1. Nature protection: national parks and landscape parks.

Poland has 19 National Parks comprising major mountain belts and forest areas. Total surface area of National Parks is above 200,000 ha. and includes 100,000 ha of forests.

International	*class*	***NAME***	***LOCATION***	total	***COMMENT***	
		1.1.1 National parks				
			voivodship	surface area (ha)		
*	I	1. Biebrza Marshes	Łomża	45200	marshes, river, wild landscape	
		2. Kampinoski	Warsaw	34900	forests, near Warsaw	4 nature paths
*	I	3. Tatrzański	Nowy Sącz	21100	alpine type mountain belt, most attractive Polish mountains	
	I	4. Słowiński	Słupsk	18200	lakes, mobile dunes, birds, rural architecture UNESCO WORLD BIOSPHERE LIST	
*	I	5. Wigierski	Suwałki	14800	lakes, Czarna Hancza river natural reserve, fauna, flora	
*		6. Stołowogórski	Wałbrzych	9650	pictoresque mountains, eroded rock formati	1 nature path
		7. Drawieński	Gorzów	8620	lakes, forests	
		8. Roztoczański	Zamość	6800	hills, forests, wild horses	1 nature path
		9. Gorczański	Nowy Sącz	5900	mountains, flora, fauna, hiking	
		10.Swiętokrzyski	Kielce	5900	oldest geological formations, mountains	
*	I	11.Bieszczadzki	Krosno	5700	mountains, wild landscape, hiking	
		12.Karkonoski	Jelenia Góra	5500	mountains, forests	1 nature path
*	I	13.Białowieski	Białystok	5300	bison reserve, great forests UNESCO W. Biosphere	2 nature paths
		14.Wielkopolski	Poznań	5200	lakes, postglacial hills, fauna, flora	
		15.Poleski	Chełm	4900	marches, forests, flora	
		16.Woliński	Szczecin	4800	forests, bird reserve, archeology site	
	I	17.Pieniński	Nowy Sącz	2300	pictoresque mountains, Dunajec river gorge	2 nature paths
		18.Babiogórski	Bielsko-Biała/Now	1700	mountains, flora, fauna UNESCO W. Biosphere	4 nature paths
		19.Ojcowski	Kraków	1600	on Trail of Eagle Nests', hills, caves, castles	

New planned Parks:
20.Great Masurian Lakes
21.Gostynińsko-Włocławski.

class	NAME	LOCALISATION		COMMENT	

1.1.2 Landscape parks

There are 53 landscape parks of total surface area of 1 mln ha. Pollution and environmentally unsound building are prohibited. Tourism and recreation are preferred.

class	NAME	LOCALISATION	surface area (ha)	COMMENT	
	1. Knyszyn Forest Park 73000 ha	Białystok	73000	largest, forest, number of nature reserves	
*	2. Eagle Nests'Park	Częstochowa, Kraków, Katowice	60000	part of the Jura Landscape Parks Complex hills, caves, rocks, castles	
	3. Poprad Park	Nowy Sącz	54000	along Poprad river, forests, mountains, health resorts	
	4. Mazurian Park	Suwałki, Olsztyn	50000	postglacial landscape, Sniardwy, Beldany and other lakes, Krytynia river, water sports	
	5. Drawski Park	Koszalin	41000	lakes (Drawskie), rivers, forests, recreation centre	
	6. Gostyńsko-Włocławski Park	Włocławek	39000	forests, lakes, bird reserve, recreation centre	
*	7. Nadmorski (Helski) Park	Gdańsk	15500	sea resorts, sandy beaches, cliffs, Hel peninsula	
*	8. Kazimierski Park	Lublin	13700	area near Kazimierz, pictoresque walks, gorges, traditional architecture	
	9. Wdzydzki Park	Gdańsk	17650	Wdzydze Lakes, are part of Tucholskie Forests	
	10.Ślęza Park	Wrocław	7860	hills near Wrocław	archeology
	11.Lednicki	Poznań	4850	Lednickie Lake with an island	arch. skansen
*	12. Kaszubski	Gdańsk	34500	Kaszubian Lakeland, forests	fauna, flora archeology

1.1.3 Nature reserves

The strictest form of environment protection. In many of them access is allowed, preferably with guide.

class	NAME	LOCALISATION	COMMENT	
I	Jaskinia Niedźwiedzia (bear cave)	Wałbrzych	cave open to visitors	
I	Jaskinia Raj (paradise cave)	Kielce	cave open to visitors	
	Kadzielnia	Kielce	geology and paleontology	
	Kawcza Gora	Szczecin	birds, cliffs	near Miedzyzdroje
I	Morskie Oko	Nowy Sącz	mountain lake in Tatras	N. P. 3
	Łuknajno	Suwałki	birds - wild swane site	
I	Stary Folwark	Suwałki	lanscape&fauna	
I	Szczeliniec Wielki	Wałbrzych	pictoresque rock formation	N. P. 6
	Szum	Zamość	river with rock gradations, fauna	
	Wąwóz Małachowskiego	Lublin	pictoresque gorges	L. P. 8
	Wodospad Wilczki	Wałbrzych	water fall in Miedzygorze	
	Jezioro Hancza	Suwałki	deepest in Poland	Suwalski L. P.
	Białowieża	Białystok	bison nature reserve	
	Pustynia Błędowska	Katowice	only desert in Poland	
	Wydmy Łebskie	Słupsk	moving sands	N. P. 4
	Międzyrzecki Rejon Umocn.	Gorzów Wlkp.	bat reserve	
	Słońsk	Gorzów Wlkp.	bird reserve	
	Przełom Dunajca	Nowy Sącz	Raft runs down Dunajec River	N. P. 17

	class	NAME	LOCATION	COMMENT		

1.2. Mountains.

mountain areas:

	class	NAME	LOCATION	COMMENT		
*	I	Tatry	Nowy Sącz	skiing, hiking, holidays, climbing	N. P. 3	
		Karkonosze	Jelenia Góra	skiing, holidays	N. P. 12	
*	I	Góry (Mountains) Stołowe	Wałbrzych	hiking	N. P. 6	
		Masyw Śnieżnika	Wałbrzych	hiking, skiing	landscape park	
		Beskid Żywiecki	Bielsko Biała	hiking	landscape park	
		Beskid Śląski	Bielsko Biała	skiing, holidays		
		Beskid Sądecki	Nowy Sącz	holidays, hiking		
		Gorce	Nowy Sącz	hiking	N. P. 9	
*	I	Bieszczady	Krosno	fine mountains for hikers	N. P. 11	tourist facilities undeveloped
		Gory Świętokrzyskie (Holy Cross Mountain)	Kielce	Poland's oldest mountains, hiking	N. P. 10 forests wilderness areas with poles of rock rubble and numerous grottos and caves	
	I	Pieniny	Nowy Sącz	hiking	N. P. 17 Raft runs are floated down Dunajec River	

1.3. Lakes and rivers.

1.3.1 Lake districts (selection):

	class	NAME	LOCATION	COMMENT	
*	I	Great Mazurian Lakes	Suwałki, Olsztyn	holidays, water sports	L. P. 4
*	I	Kaszubian	Gdańsk	recreation/holidays, water sports	L. P. 12
	I	Drawskie	Koszalin	recreation/holidays, water sports	L. P. 5
		Ilawskie	Olsztyn	recreation, water sports	
		Olsztynskie	Olsztyn	recreation/holidays, water sports	
*	I	Suwalsko-Augustowskie	Suwałki	holidays, water sports	N. P. 5
		Wielkopolskie	Poznań, Bydgosz	recreation, water sports	

1.3.2 Lakes (selection)

NAME	LOCATION	**sites/centres**
Charzykowskie	Gdańsk	Chojnice, Charzykowy
Dadaj	Olsztyn	Biskupiec
Drawsko	Koszalin	Czaplinek
Jeziorak	Olsztyn	Iława, Ostróda
Łubie	Koszalin	Drawsko Pomorskie
Łańskie	Olsztyn	Olsztynek
Raduńskie	Gdańsk	Chmielno
Wdzydze	Gdańsk	Wdzydze
Wigry	Suwałki	Stary Folwark
Sniardwy	Suwałki	Mikołajki, Ruciane-Nida
Mamry	Suwałki	Giżycko, Wikasy

	class	NAME	LOCATION	COMMENT			

1.3. Lakes and rivers. (cont)

1.3.3 Man-made water resources:

				sites/centres			
		Koronowski	Bydgoszcz	Koronowo			
		Rożnowski	Nowy Sącz	Rożnów			
	I	Solinski	Krosno	Solina			
		Zegrzynski	Warszawa	Zegrze, Serock			
		Otmuchowski	Opole	Otmuchów, Paczków			
		Włocławski	Włocławek	Włocławek, Płock			
		Zywiecki	Bielsko Biala	Zywiec , Tresna			
		canals:					
	I	Augustowski Kanał (canal)	Suwałki	100 km long linking Wisla with Niemen			XIX C.
	I	Elbląski Kanał	Elbląg	67 km long linking Wisla Bay with Ilawa Lakes			engineering art:

1.4. Forest areas.

		Puszcza Augustowska	Suwałki			National Park 5	
		Knyszyńska	Białystok			Landscape Park 1	
		Borecka	Suwałki				
		Drawska	Koszalin		developing tourism	Landscape Park 5	
		Goleniowska	Szczecin				
		Karpacka	south Poland			Nationals parks: 3, 9, 11, 17, 18	
		Notecka	Poznań, Piła, Gorzów				
	I	Piska	Suwałki		devoloped tourism: lakes and sailing centres		
		Rzepińska (Lubuska)	Zielona Góra		developing tourism		
		Sudecka	Jelenia Góra, Wałbrzych			N. P. 12	
		Wkrzańska	Szczecin		bird natural reserve		
		Bory Tucholskie	Bydgoszcz, Gdańsk				
*	I	Puszcza Białowieska	Białystok		World Biosphere List	National Park 13	
		Puszcza Kampinoska	Warsaw			N.P. 2	

1.5. Sea and sun

		Most visited seaside resorts:					
		Świnoujście	Szczecin	health resort	port, border crossing		
*	I	Międzyzdroje	Szczecin	popular resort	good beaches	National Park 16	
		Kołobrzeg	Koszalin	health resort			
		Ustronie Morskie	Koszalin	small resort			
		Darłowo	Koszalin	fishing port			
		Ustka	Słupsk	health resort, port			
*	I	Łeba	Słupsk	fishing port	good beaches	National Park 4	mobile sands,lakes
*	I	Jastrzębia Góra	Gdańsk	small resort	cliffs	landscape park 7	
		Władysławowo	Gdańsk	fishing port		landscape park 7	
*	I	Jastarnia	Gdańsk	fishers' village on Hel peninsula		landscape park 7	
	I	Hel	Gdańsk	fishers' village on Hel peninsula		landscape park 7	
*	I	Sopot	Gdańsk	big seaside reso (not for nature lovers)			
		Krynica Morska	Elbląg	small resort	good beaches	landscape park	

class	NAME	LOCATION	COMMENT		

1.6. Health resorts and spas.

class	NAME	LOCATION	COMMENT		
I	Wieliczka	Kraków	allergy & asthma	located down 200 m in old salt mine	one of two sites in Europe
I	Kowary	Jelenia Góra	uran mine adapted for radium treatment		
I	Ciechocinek	Włocławek	has salt hot springs and provides salts and iodium inhalations	one of oldest Polish resorts	
I	Cieplice-Zdroj	Jelenia Góra	hot fluorine - siliceous waters	known in Europe since 17 century	
	Busko-Zdroj	Kielce	rheumatism, respiratory complaints		also for children
	Kudowa - Zdroj	Wałbrzych	circulatory complaints, metabolic disorders		
	Duszniki -Zdroj	Wałbrzych	digestive tract complaints, gyneacologic disorders		
	Polanica	Wałbrzych	circulatory complaints, digestive tract disorders		
I	Konstancin-Jeziorna	Warszawa	orthopaedic treatment and rehabilitation, metabolic disorders		
	Muszyna	Nowy Sącz	pulmonary disorders		
	Zegiestow	Nowy Sącz	digestive tract complaints, urologic disorders		
	Szczawnica	Nowy Sącz	pulmonary disorders		
	Rabka	Nowy Sącz	rheumatic and respiratory complaints, metabolic disorders		children mainly
	Iwonicz	Krosno	orthopaedic treatment, reumatic and pulmonary disorders		
	Konstancin	Warsaw	reumatic, metabolic, and cilculatory		
	Świeradów Zdrój	Jelenia Gora	pulmonary, reumatic		
	Rymanow	Krosno	pulmonary, circulatory complaints		also for children
	Krynica	Nowy Sącz	digestive tract complaints, urologic disorders, gyneacologic disorders		

2. Historic and cultural attractions

2.1. Old town complexes

International	*class*	*NAME*	*LOCATION*	*COMMENT*
*	I	Warsaw		Destroyed during World War II and carefully restored (UNESCO World Heritage List).
*	0" class	Cracow		Poland's former capital UNESCO World Heritage List Medieval huge market square, Cloth Hall, Town Hall Tower and many churches, burgher's houses, Wawel Castle Jagiellonian University Jewish Town - Kazimierz with synagogues, museum
*	0" class	Gdańsk		One of the Baltic's greatest harbours and one of the old Hansa towns next to Szczecin and Elbląg burgher's houses&palaces; most famous: Artus' Court
*	0" class	Toruń		Gothic Old Town, walls, churches, Copernicus birth place&museum
*	0" class	Poznań		Medieval market place, city hall
*	0" class	Wrocław		Ostrów Tumski, city hall
*	0" class	Sandomierz	Tarnobrzeg	Old town complex , market place, Dominican monastery, cathedral Underground Tourist Route - a chain of cellars beneath the market place
	0" class	Zamość		houses old town complex and defence walls (16th - 17th c.)
*	0" class	Frombork	Elbląg	Gothic Old Town buildings Nicolas Copernicus place of work&living; museum
*	0" class	Kazimierz Dolny	Lublin	Renaissance old town complex, ancient burghers' houses, granaries
*	0" class	Paczków	Opole	Complex of defence town walls and towers (16th c.)
	0" class	Przemyśl		esp. John Baptist church
	I	Szydłów	Kielce	Old town complex, defence walls
*	I	Chełmno	Toruń	Gothic church and cloister gothic town hall, fortified walls

International

2.2 Castles and palaces

	class	NAME	LOCATION	COMMENT		
		The Royal Castle	Warsaw	collection of arts		interior museum
*	0" class	Wilanów	Warsaw	a baroque palatio-park complex		branch of National Museum
				baroque garden and Anglo-Chinese park. Museum and Exhibition hall of Posters		
*	0" class	The Royal Łazienki	Warsaw	a vaste park with a palace "On the Water"		museum
				a number of neoclassical buildings		
				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		
*	0" class	The Wawel	Cracow	old seat of kings	Renaissance castle with an arcaded courtyard, tapestry colection & furniture	
*	0" class	Łancut	Rzeszów	early Baroque castle	landscape park and a unique carriage collection musical festival	
*	0" class	Malbork	Elbląg	large Castle of Teutonic Knights	excellent example of gothic architecture	
		Antonin	Kalisz	Radziwill's	hotel	events, recreation facilities
*	0" class	Baranów Sandomierski	Tarnobrzeg	Palac Leszczynskich	renaissance, Baroque interiors museum	hotel
		Bestwina		Habsburgs' residence		
		Biecz	Krosno	Wittellsbachs'		
*	0" class	Brzeg	Opole	renaissance, sculptures	museum	
		Bytow	Slupsk	Teutonic Castle	hotel, museum	
		Frombork	Elbląg	Warmia bishops'	Copernicus museum	
		Głogówek	Opole	Knight's castle	late Renaissance	
		Gniew	Gdańsk	Teutonic Castle	hotel	
*	I	Gołub-Dobrzyn	Torun	Teutonic Castle	events, tournaments	hotel
		Goluchow	Kalisz		interiors and forestry museums	landscape park
		Kamieniec Zabkowicki	Walbrzych	romantic residence	under reconstruction	
		Kętrzyn	Olsztyn	Teutonic Castle		
		Kielce		Bishop's Palace	Renaissance	paintings gallery
	I	Kornik	Poznań	The Library and museum of castle interiors		
*	I	Kozłówka	Lublin	Baroque interiors	museum of socrealism sculpture	
*	0" class	Krasiczyn	Przemysl	Krasicki's Castle	hotel	conference room
*	I	Książ	Walbrzych	one of the biggest	hotel, events, stud farm	conference room
		Kwidzyn	Elbląg	castle complex		museum
	0" class	Lidzbark Warminski	Olsztyn	Warmia bishops' castle complex; 14 c.		museum
	0" class	Lublin		castle chapel, 14 C		
		Mala wies	Warsaw	classicism	hotel	
*	0" class	Nieborów	Skierniewice	interior museum	guest rooms	
		Nidzica	Olsztyn	Teutonic Castle	hotel	
		Olsztyn	Olsztyn	Gothic	museum, Kopernik	
*	I	Opinogóra	Ciechanów	neogothic	museum of Romanticism	
	I	Pieskowa Skała	Cracow	renaissance residence	museum	

2.2 Castles and palaces (continued)

	class	NAME	LOCATION	COMMENT		
	0" class	Płock		castle/cathedral complex		
		Poznań				
*	I	Pultusk	Ciechanów	Polonia House	hotel	conference room
		Pszczyna	Katowice	Hochbergs'	museum, park	
*	0" class	Radzyń Chełmiński	Toruń	remains of Teutonic Knights' castle		
		Radzyń Podlaski	Lublin		rococo decarations, park	
		Reszel	Olsztyn	bishops'	cultural events	hotel
	I	Rogalin	Poznań	Raczynski's	museums of castle interiors, park	
		Rydzyna	Leszno			hotel, conference room
		Sandomierz	Tarnobrzeg			
		Sieniawa	Przemyśl	palace&park complex	hotel, conference room	recreation
		Slupsk	Slupsk	Renaissance	museum, paintings gallery	
*	0" class	Ujazd	Kielce	ruins of Krzyztopor Castle		
		Walewice	Skierniewice	classicism	Napoleon stud farm	
*	0" class	Wisnicz	Tarnów	castle complex		
*	0" class	Żagań	Zielona Góra	Wallenstein's residence		
		Zamość				
		Others are in:				
		Szczecin	Szczecin	Pomeranian Dukes		
		Morąg	Olsztyn	Dohn family	J.G.Herder museum in the Rathaus	
		Radziejowice	Skierniewice		hotel, conference room	
		Łódź		rich manufacturers' residences		
		Niedzica	Nowy Sącz	upon River Dunajec	residential castle	
		Ogrodzieniec	Katowice	on the Trail of Eagle's Nests: a number of scenic ruins of castles		
		Polish manors:	Mazovia, Malopolska			
*	I	Żelazowa Wola	Warsaw	Chopin's birthplace		
		Wola Suchożebska	Warsaw	accommodation, restaurant		
		Kampinos	Warsaw			
		Bronowice	Cracow			
		Parks:				
*	0" class	Arkadia	Skierniewice	Romanticism		
	0" class	Royal Łazienki	Warsaw	Classicism		
*	0" class	Wilanow		Baroque and oriental-english		
	I	Pulawy	Lublin	Romanticism, english style		
		Siedlce		Romanticism, *	'Aleksandria'	
		Mala wies	Radom	Natural style		
		Krzeszowice	Kraków	Natural style		
		Krasiczyn	Przemyśl	Natural style		
		Klemensów (near Szczebrzesz	Zamość	Natural style		
		Opinogora	Ciechanów	Natural style		
		Białystok		French style	(Branickis' castle)	
		Gdańsk-Oliwa	Gdańsk	French style		
		Radzyń Podlaski	Lublin	French style		

International

	class	NAME	LOCATION	COMMENT		

2.3 Religious shrines

	class	NAME	LOCATION	COMMENT		
*	0" class	Częstochowa		Pauline monastery on Jasna Gora (Bright Mountain) destination of pilgrimes to the Painting of the Blessed Mother the "Black Madonna" monastery treasure, numerous works of art		
*	0" class	Gniezno	Poznań	Gothic Archcathedral of the Assumption of the Blessed Virgin Mary the capital of first Dukes of Piast dynasty	Romanesque	
*	0" class	Lubiąż	Wrocław	Cistercian abbey one of the largest and most magnificent Baroque monasterial complexes		Eur.Cisterial Trail

2.3.1 Important Cistercian abbeys (selection):

	class	NAME	LOCATION	COMMENT		
*	0" class	Henryków	Wałbrzych	Cistercian abbey		Eur.Cisterial Trail
		Jedrzejów	Kielce	Cistercian abbey		Eur.Cisterial Trail
		Mogiła	Kraków	Cistercian abbey		
		Pelplin	Gdańsk	Cistercian abbey		Eur.Cisterial Trail
	0" class	Krzeszów	Jelenia Góra	Cistercian abbey		Eur.Cisterial Trail
	0" class	Sulejów	Piotrków	Cistercian abbey		Eur.Cisterial Trail
*	0" class	Wąchock	Kielce	Cistercian abbey		Eur.Cisterial Trail
*	0" class	Gdańsk - Oliwa		Cistercian abbey		Eur.Cisterial Trail
	0" class	Gdańsk		Church of the Blessed Virgin Mary enormous Gothic structure The largest church in Poland		
*	0" class	Trzebnica	Wrocław	Cistercian abbey		
		Kruszwica	Bydgoszcz	romanesque church		
	0" class	Wrocław		Cathedral of St.John		
		Leczyca	Płock	collegiate church	romanesque	
	0" class	Strzelno	Bydgoszcz	St Prokop's church	romanesque	
	0" class	Strzelno		norbertian basilica	romanesque	
*		Cracow		the Marian church	Gothic altar carved out of linden wood by Wit Stwosz	
*	0" class	Wawel		cathedral where Polish kings were crowned and laid to rest (there are tombs of other heroes such as Tadeusz Kosciuszko)		

2.3.2 Warsaw's Old Town

	class	NAME	LOCATION	COMMENT		
				Cathedral of St.John		
	0" class	Stargard Szczecinski	Szczecin	Church of the Blessed Virç	gothic	
	0" class	Toruń		St Jakub's church	gothic	
	0" class	Toruń		Franciscanian monastery	gothic	
	0" class	Toruń		John Baptist's church	gothic	
	0" class	Poznań		St Magdalena's church	baroque	
	0" class	Mogilno	Bydgoszcz	St John church	gothic	
	0" class	Chelm		Pijar's monestery		
	0" class	Zamość		St Thomas church		
	I	Swięta Lipka	Olsztyn	most eminent baroque shrine in North Poland		
	0" class	Legnickie Pole	Legnica	baroque, Benedictian		
		Wislica	Kielce	romanesque collegiate, 13 C.		
*	I	Wigry	Suwałki	camedulian monastery on lake peninsula		hotel

	class	NAME	LOCATION	COMMENT	

2.3 Religious shrines (continued)

2.3.3 Orthodox churches

located at the East and South East provinces (Krosno, Nowy Sącz)

	class	NAME	LOCATION	COMMENT	
*	I	Grabarka		old wooden monaster and church	major pilgrimage destination for orthodox people
		Jabłeczna near Terespol		orthodox monaster	
		Sokółka		orthodox church	
		Warsaw		Luterian church	

2.3.4 Synagogues

	class	NAME	LOCATION	COMMENT
*		Warsaw		
*		Cracow (Stara Boznica from 15th century)		
*		Tykocin	Białystok	
		Szydłowiec	Radom	
		Zamość		
*		Łańcut	Rzeszów	
		Włodawa	Chełm	

2.3.5 Moslem shrines

	class	NAME	LOCATION	COMMENT
		Bohoniki	Białystok	
		Kryszyniany	Białystok	

2.4. Old wooden architecture

	class	NAME	LOCATION	COMMENT	
	0" class	Haczów	Krosno	Gothic church	
		Zaborówek	Kielce	church; 14th and 15th century	
*	0" class	Dębno	Nowy Sącz	church 15th C	
	0" class	Boguszyce	Skierniewice	late Gothic church	very interesting interior
	I	paper-mills in Duszniki	Wałbrzych	17th century	
		Gdańsk-Lipce	Gdańsk	17th century house	
		Chełmesko	Jelenia Góra	twelve 18th century houses	
		Rogów	Kielce	granary 1684	Wind mill built in 1585 is transferred to the open-air museum

There are over 30 skansen museums for exhibition of the remains of wooden buildings.
The most eminent skansens are:

	class	NAME	LOCATION	COMMENT
		Zubrzyca	Nowy Sącz	Orawski Ethnographical Park,
*		Sanok	Krosno	Museum of Regional Building in
*		Lednickie Lake	Poznań	Great Poland Ethnographical Park
		Kluki	Słupsk	Słowinski Skansen
*		Wdzydze Kiszewskie	Gdańsk	Kaszubian Ethnographical Park
		Olsztynek	Olsztyn	Museum of Regional Building
		Łowicz	Skierniewice	Museum of Regional Building

/	class	NAME	LOCATION	COMMENT	

2.5. Museums.

There are in Poland 550 museums. From that at least 30 are of high importance

	class	NAME	LOCATION	COMMENT	
*	I	Krakow		Wawel Castle	Art Collection
		Gdańsk		National Museum	
	I	Kraków		National Museum	
	I	Poznań		National Museum	
		Szczecin		National Museum	
		Wrocław		National Museum	photo collection
*	I	Warsaw		National Museum	(and its branches in Lazienki, Wilanow, Nieborow)
		Warsaw		The John Paul II Collection	paintings
		Warsaw		Museum of Technology	
*		Łódź		Museum of Modern Art	
*		Krakow		Czartoryski' Museum	

2.5.1 Others special museums

	class	NAME	LOCATION	COMMENT
*	I	Jedrzejow	Kielce	Clock museum
		Gdańsk		Central Museum of the Sea
		Poznań		Museum of Music Instruments
*	I	Majdanek	Lublin	museum of martyrology
*	I	Oświęcim	Bielsko Biała	museums of martyrology
		Kraków		museum of archeology

2.5.2 Industrial heritage

	class	NAME	LOCATION	COMMENT
		Duszniki	Walbrzych	paper mill
*	I	Wieliczka	Krakow	Museum of Salt works
	I	Łódź	Łódź	Museum of Textile Industry hisotry
		Hel	Gdańsk	Fishing museum
		Wenecja	Bydgoszcz	rail museum
		Bóbrka	Krosno	oil industry museum
		Ciechanowiec	Lomza	Museum of Agriculture
		Swarzędz	Poznań	bee keepers skansen
*		Augustowski Kanał (canal)	Suwałki	XIX C canal engineering
		Elbląski Kanał	Elbląg	XIX C canal engineering
		Kraków		Museum of Pharmacy

2.5.3 Archeology sites

	class	NAME	LOCATION	COMMENT	
*	I	Biskupin	Bydgoszcz	fortified Lusatian settlement built at 700 - 400 B.C.	
		Ślęza Landscape Park	Wrocław	pre-Christian worship plac hills near Wrocław	
		Lednicki Landscape Park	Poznań	Lednickie Lake & island	archeology skansen
*	I	Krzemionki Opatowskie	Kielce	ancient (neolit) mining centre	
		Łysa Góra	Kielce	pre-Christian worship place	
*	I	Słupia Nowa	Kielce	old metalurgy center	
		Giecz	Poznań	old settlement	
		Igołomia	Kra ków	clay production	

2.5.4 Military monuments

	class	NAME	LOCATION	COMMENT
*	I	Międzyrzecz	Gorzów	II World War fortifications
		Giżycko	Suwałki	Boyer Fortress, prussian, 19 C.
*	I	Gierłoż	Olsztyn	the site of Hitler's headquarters - the "Wolf's Lair"
	0" class	Gdańsk		Wisloujscie forts
		Toruń		prussian fort, 19. C.
*	I	Kłodzko	Wałbrzych	fortress 17 - 19 C., network of underground tunnels
	I	Modlin	Warszawa	fortress, originally napoleonian
	I	Kraków		Barbican
		Kraków		arsenal in Floriańska Gate
	I	Przemyśl		austrian fortifications, one of the largest

Summary of historical sites of high importance

class	*NAME*	*LOCATION*	*COMMENT*	
I	Biskupin	Bydgoszcz	a fortified Lusatian settlement built at 700 - 400 B.C.	
	Ciechocinek	Włocławek	health resort with long tradition	unique graduation towers (1824-1859) saltworks
I	Chełmno	Toruń	gothic church and cloister gothic town hall, fortified walls	
I	Chochołów	Nowy Sącz	village of traditional highlanders' wooden architecture	
0" class	Częstochowa		Pauline monastery pilgrimes destination	
I	Gierłoż	Olsztyn	the site of Hitler's former headquarters - the "Wolf's Lair"	
	Grunwald	Olsztyn	the field of the famous battle with Teutonic Knights (1410)	
I	Książ	Wałbrzych	castle and equestrian center	
0" class	Łańcut	Rzeszów	an early-Baroque castle	
0" class	Malbork	Elbląg	huge castle of the Teutonic Knights	
	Nysa	Opole	baroque church (17th c.) and Bishops'Palace (17th c.)	
0" class	Ostrów Lednicki	Poznań	archit. monuments of Piast dynasty, etnographic park	
UNESCO	Oświęcim	Kraków	museum of the martyrology on the grounds of the Nazi concentration camp	
I	Treblinka		museum of the martyrology of Warsaw Ghetto victims	
UNESCO	Wieliczka	Kraków	museum of the saltworks: the history of salt mining, salt sculptures also alergical sanatorium	
	Szlak Piastowski	Poznań	route following Piast dynasty highplaces	
I	Zakopane	Nowy Sącz	the capital of Polish Tatras	
I	Żelazowa Wola	Warsaw	Frederic Chopin's birth place	

3. Sports & special interest

3.1. Water Sports

3.1.1 sailing centres:

/	class	NAME	LOCATION	COMMENT
		Trzebież	Szczecin Bay	Development of sailing tourism and recreation hindered by the lack of landing places with full range of services
		Gdańsk/Gdynia	Gdansk Bay	
		Wilkasy	Great Mazurian Lakes	
*	I	Giżycko	Great Mazurian Lakes	
		Sztynort	Great Mazurian Lakes	
*	I	Mikołajki	Great Mazurian Lakes	
		Ryn	Great Mazurian Lakes	
		Piławki / near Ostróda	Iława Lakes	
*	I	Augustów	Suwałki Lakes	
	I	Charzykowy	Charzykowskie Lake	
*		Zegrzyn Bay area	near Warsaw	

3.1.2 Lakes good for sailing

/	class	NAME	LOCATION	COMMENT
*	I	Śniardwy (114 km2)	Great Mazurian Lakes	
		Mamry (104 km2)	Great Mazurian Lakes	
		Niegocin (26 km2).	Great Mazurian Lakes	
*	I	Lake Wigry (22km2)	Suwalsko-Augustowskie Lakes	
		Jeziorak	Ilawskie Lakes	
		Charzykowskie Lake (14km2)		
		Drawsko (14km2)	Drawskie Lakes	
		Wistula Bay		would become an atractive sailing area after opening Krolewiec (Kaliningrad) region

3.1.3 Man-made water resources

/	class	NAME	LOCATION	COMMENT
		Włocławski (70km2)		
		Soliński (21 km2)		
	I	Zegrzyński (33 km2)		

3.1.4 Water trails of international class

/	class	NAME	LOCATION	COMMENT
*	I	Great Mazurian Lakes	Suwałki, Olsztyn	
*	I	Jeziora Iławskie	Olsztyn	
*	I	Jeziora Brodnickie.	Toruń	

3.1.5 Trails for kayak runs along mountain rivers

/	class	NAME	LOCATION	COMMENT
*	I	Dunajec		International Rally through Dunajec, taking place yearly, attracts some hundreds of participants from many countries.
		Poprad		
		San		

3.1.6 Rivers going through forests and connected with lakes

/	class	NAME	LOCATION	COMMENT
		Brda		
*	I	Czarna Hańcza	from Wigry to Augustów Canal (50 km) or from Suwałki to Hańcza Lake (30km)	
	I	Drawa	from Drawsko Lake (Czaplinek)	
*	I	Krutynia	starts west of Mrągowo; goes to Ruciane Nida; 100 km	
		Pasłęka		
		Paklica		
		Obra		
		Noteć		
		Mysła		
		Bóbr		
		Kwisa		
		Radunia		
		Wda		
*	I	Biebrza	an unique route passes huge marshes	

3.1.7 Monuments of 19 century engineering art

/	class	NAME	LOCATION	COMMENT
	I	Augustowski Kanal (canal)		100 km long linking Wisla with Niemen
	I	Elbląski Kanal		67 km long linking Wisla Bay with Ilawa Lakes

3.2. Winter Sports

/	class	NAME	LOCATION	COMMENT
		3.2.1 places for skiing:		
*	I	Zakopane	Tatras	General remark: ski lifts (T-bars J-bars chair lifts gondolas are available, but their number is unsufficient. Particularly there is no extended system of the lifts, leaving many slopes unused. All major winter sport centers have equipment rental shops. The best conditions for skiing are in Tatras where unsolved conflict between needs of enviromentalists and of skiiers keeps the development of skiing facilities stopped. The same conflict can be seen in Bieszczady.
		Bukowina Tatrzanska	Tatras	
*	I	Szczyrk	Beskid Śląski	
		Brenna	Beskid Śląski	
		Wisła	Beskid Śląski	
	I	Korbielów	Beskid Żywiecki	
		Szklarska Poręba	Sudetes	
		Karpacz	Sudetes	
		Zieleniec	Sudetes	
		Snieżnik mountain	Kłodzko	to be developed; plans exist
		3.2.2 Cross-country skiing:	rather underdeveloped,	
		Generally at highlands (Beskides, Sudetes) and:		
		Suwalskie Lakeland	Suwałki	
		Kaszubian Lakeland	Gdańsk	
		Bukowa Puszcza	Szczecin	
		3.2.3 Cross-country skiing events:		
		Gwarek's Run	Beskides	
*	I	Piast's run	Sudetes	similar event to famous Waza's Run in Sweden
		North Wondering	Suwałki	
		Jacwing's Run	Suwałki	
		3.2.4 Frozen lakes used for skateing and ice-boats:		
*		Mrągowo	Olsztyn	
		Charzykowskie	Gdańsk	

3.3. Cycling/mountain biking

Bike touring throughout the countryside has traditions in Poland but is not very popular. Polish Society of Touring and Tourism has a division of bike tourists and organises rides.

Best places for cycling are in lakelands and some mountains
The following places could be used as a central sites for bike excursions:

/		
*	Kartuzy	Kaszubian Lakeland
	Mikołajki,	Masurian Lakeland
	Karpacz.	Sudety
	Szlarska Poręba	Sudety
	Lubniewice	Gorzowskie
	Ustronie	Beskidy
	Jaworze	Beskidy
	Wisła	Beskidy

a) Worth promoting is also a mixed form, coach & bike, for sightseeing of natural attraction areas.
b) mountain bikes are becoming popular in Poland. Zakopane and Karpacz can be recommended for this kind of sport. Mountain bikes can be rented in both sites.

3.4. Mountain and cross-country hiking

/	class	NAME	LOCATION	COMMENT
		3.4.1 mountain walks & hiking		
*	I	Zakopane & vicinity	Tatras	Many trails are prepared and marked and a network of mountain hostels/shelters is established. Dangerous segments (in rocks) are equipped with safety gear such as chains and clamps. Mountain hostels are mostly in bad condition and are getting worn out.
		Karpacz	Sudetes	
		Szklarska Poreba	Sudetes	
		Kudowa	Sudetes	
		Polanica	Sudetes	
		Duszniki	Sudetes	

		Wisła	Beskides	
		Szczyrk	Beskides	
		Szczawnica	Beskides	
		Krynica	Beskides	
*	I	Bieszczady in general		For the international tourism purposes, the most attractive could be hiking through Bieszczady (wilderness and landscape).

3.4.2 Climbing

	I	Tatras
		Sudetes, some parts
		Karkonosze
		Góry Stołowe
		Góry Sokole
	I	Jura Krakowsko-Częstochowska

3.4.3 speleology

	I	Jaskinia Śnieżna (the Snow Cave)	Western Tatras	deepest cave in Poland
	I	Bandzioch Kominiarski	Western Tatras	longest
		Kraków-Częstochowa Upland		several caves
		Jaskinia Raj (Paradise)	Kielce	
		Jaskinia Niedźwiedzia (Bear)	Sudetes	

3.4.4 cross-country hiking

		Suwalsko-Augustowskie		lake district
		Masurian		lake district
		Pomerian		lake district
*		Kaszubian	Gdańsk	lake district
		Notecka Puszcza	Poznań, Piła, Gorzów	forests
	I	Tucholskie Bory	Bydgoszcz, Gdańsk	forests
		Knyszyńska Puszcza	Białystok	forests
		Dolnośląskie Bory	Legnica	forests
		Solska Puszcza	Zamość, Tarnobrzeg	forests
		Piast Trail	Poznań, Włocławek	cultural/landscape
*	I	Trail of "Eagle Nests"	Kraków-Częstochowa	cultural/landscape

3.5. Other special:

/	class	NAME	LOCATION	COMMENT

3.5.1 Horses: holidays "on the saddle"

/	class	NAME	LOCATION	COMMENT
		Biały Bór	Koszalin	
		Racot	Poznań	
		Sieraków Wielkopolski	Poznań	
		Czerniejewo	Poznań	
		Dłusko	by the Warta river	holiday and horse riding centre
		Szczawno-Zdroj	Wałbrzych	also health resort
*		Książ	Wałbrzych	accomodation in the castle
		Budzistowo	Koszalin	2. 5 km from Kołobrzeg
		Sominy	Słupsk	other sports (tennis, sailing) avaible
		Wojcieszów	Jelenia góra	at the foot of the Sudeten
		Ochaby	Bielsko Biała	
		Łąck	Płock	
		Miłków	Jelenia Góra	
		Łobez	Szczecin	
		Kadyny	Elblag upland	palace hotel
		Drzonków	Zielona Góra	also training centre for sportsmen
		Racułka	Zielona Góra	
		Iwno	Poznań	palace hotel
*	I	Janów Podlaski	Bielsk Podlaski	bloodstock sales are run by special trade agency ANIMEX

3.5.2 Horse rallies

/	class	NAME	LOCATION	COMMENT
		The Sudeten Rally	Wałbrzych	(starts and ends at Szczawno-Zdroj)
		The rally though the Kaszubian region	Gdańsk	(starts and ends at Wdzydze Kiszewskie)

3.5.3 Fotosafari

the largest woods & nature reserves in general and especially:

/	class	NAME	LOCATION	COMMENT
*	I	Biebrza Marshes	Łomża	
	I	Great Mazurian Lakes	Suwałki, Olsztyn	
		Bieszczady	Krosno	

3.5.4 Survival

/	class	NAME	LOCATION	COMMENT
*	I	Biebrza Marshes	Łomża	
*	I	Romincki Forest	Suwałki	

3.5.5 Balloon sport

Leszno
Białystok
Poznań

3.5.6 Gliding

/	class	NAME	LOCATION	COMMENT
		Jelenia Góra		
		Międzybrodzie Zywieckie		
*	I	Leszno		

3.5.7 Golf

At present there are a few golf courts in Poland:

/	class	NAME	LOCATION	COMMENT
		Rajszew	Warsaw	
*		Poznań		
*		village Postołowo, 26 km from	Gdańsk	hotel, restaurant ; also tenis and hunting are avaible there.

Appendix 4: Protection of tourism assets - the environment and monuments

In this apendix we outline current procedures and responsibilities for the protection of the environment and monuments, which are of key importance for the development of tourism assets. As an example of successful management of historic buildings and sites of historic and natural interest we also present and describe the English Heritage and The National Trust in the United Kingdom.

4.1 Protection of the environment

In this section we outline current procedures and responsibilities for the protection of nature and the environment, highlighting those areas of importance to tourism industry authorities in improving the interface with government institutions.

4.1.1 Responsibilities for environmental protection

Environmental protection in Poland is regulated by three legal acts: The Law on Environment Protection (1980), The Law on Nature Protection (1991), and The Statute of The Ministry of Environment, Natural Resources and Forestry (1993). Responsibilities for environmental protection belong to the Minister of Environment, Natural Resources and Forestry. The executive role of nature protection is handled by The Principal Conservator of Nature (nominated by the Prime Minister). The State Inspection of Environment Protection (PIOŚ) is controlling the fulfilment of environment protection requirements, and its head has a grade of Deputy Minister. The tasks realised by PIOŚ include :

- Creation of standards of admissible pollution levels;
- Inspection compliance with environment protection regulations;
- Initiation of research and popularisation of environment protection;
- Investigation/examination of complaints against people or institutions polluting the environment.

State institutions for nature protection are:

- The Minister of Environment, Natural Resources & Forestry;
- The Voivodas who are executing the Government policy concerning nature protection on local level;

- The Directors of National Parks (special administration).

The Minister has three full time advisory bodies:

- The State Council of Nature Protection
- The State Council of Environment Protection;
- The Geological Council.

4.1.2 Environmental protection areas

Poland has a well-developed system for identifying environmental protection areas :

- Creation of national parks;
- Recognition of limited territories as nature reserves;
- Creation of landscape parks
- Limitation of territories of protected landscape;

supported by such activities as: national flora and fauna protection and specific site protection programme (nature monuments, nature-landscape complexes etc.).

4.1.2.1 National parks

A National Park is a protected territory of scientific, natural and cultural importance, of an area not less than 1,000 ha. A zone is created around the park to which special regulations of environment protection apply. A national park is created by an act of the Council of Ministers. The Minister of Environment decides its rules and regulations. The state budget finances National Parks. Activities at National Parks are supervised and co-ordinated by the Minister of Environment and National Board of National Parks.

4.1.2.2. Nature reserves

These are territories that cover preserved natural ecosystems. The limits, names, and locations of nature reserves are decided by the Minister of Environment, who also supervises them.

4.1.2.3 Landscape parks

A landscape park is an area in which economic activities are permitted under special rules of nature protection. The decision to create a landscape park is taken by the Voivode, who appoints Directors of Parks. One of the functions of such parks (apart from nature protection) is development of approved tourism.

4.1.2.4 Protected landscape areas

A protected landscape area contains other lands where the balance of ecosystems should be maintained while conducting economic activities.

National parks, nature reserves and landscape parks can obtain international status, which is defined by international conventions or decisions. These relate particularly to biosphere conservation and environmental zoning.

4.1.3 Restrictions on tourism development

Areas of the types described above are covered by a national strategy of nature protection elaborated by the Minister of Environmental Protection.

In national parks and nature reserves, all building or development of facilities not directly related to the objectives of those parks are prohibited (or require special permission of authorities in the voivodship).

The following are strictly controlled:

- Hunting, fishing, gathering of fruits and mushrooms;
- Industrial, farming or commercial activity;
- Vehicular traffic;
- Swimming, sailing, use of motor boats, practice in motor and water sports, shipping of passengers.

The Minister of Environmental Protection keeps the register of national parks, sanctuaries, landscape parks, landscape protected areas and national monuments. The Minister also defines the procedures, rules and responsibilities of wardens, and defines regulations for access and visit. Services related to tourism in national parks are managed by The Directors of National Parks.

4.2 Protection of monuments

Poland has a multitude of man-made attractions and monuments resulting from its rich historical and cultural heritage, which are subject to a comprehensive system of protection. Monument protection is subject to a wide-ranging complex system of administrative control covering several institutions. This creates problems for tourism industry development.

4.2.1 Legislative scope of protection

Monuments coming under the protection of the State are classified as "Cultural Property". Cultural property means any movable or immovable, ancient or contemporary object which is important in terms of cultural heritage and cultural development on account of historical, scientific or artistic value. These monuments are protected by law. They include :

- Works of architecture and urban development (e.g. castles, palaces, parks and decorative gardens, churches, cloisters, cemeteries, etc.);
- Historic battlefields, as well as other sites or buildings connected with important historic events (e.g. concentration camps);
- Ethnographic sites such as groups of village buildings, particularly rural structures;
- Ancient mines, foundries, workshops (when such objects are unique or when they are connected with important stages in technological development).

In 1964, the Minister of Culture and Arts completed a classification of monuments. Monuments with international value were categorised "0" class. They represent the main tourism attractions of Poland. The remainder, depending on value, importance and preservation status, was dividing into classes from I to IV.

4.2.2 Responsibilities for monument protection

Primary responsibility for the supervision of the protection of cultural property on behalf of the State is exercised by the Minister of Culture and Arts, through the State Service for the Protection of the Monuments (SSPM), managed by the Principal Inspector of Monuments. SSPM fulfils executive and advisory functions on the central level of government administration. In voivodships, the interests of the State are represented by Voivodes, through Regional Inspectors of Monuments, who manage the activities of appropriate branches of SSPM.

The National Council of Monuments Protection provides advice to the SSPM and the Minister. Similar councils are situated in voivodships, supervised by the Regional Inspectors of Monuments.

The central register of cultural property is managed by the Director of the Historical Monuments Documentation Centre.

Among the other institutions protecting cultural property is the Monuments Landscape Protection Centre, which oversees documentation, research, and design and garden works.

The protection of cultural property is also carried out also by directors of museums and managers of other specialised institutions.

For the commune or town with a large number of monuments, the Regional Inspector of Monuments may establish a local, communal or municipal Inspector of Monuments as a state-operated organisational unit and entrust it with management, on his behalf.

The other competencies of Inspectors of Monuments are as follows:

- Give permission for works on all monuments (conservation, reconstruction, extention, etc.);
- Undertake the decision to carry out the necessary conservation works within a specified period of time;
- Supervise proper use of monuments;
- Sign (plque) monuments;
- Analyse historic and artistic values of the monument and its preservation status;
- Take over of the immovable monument by the State according to regulations on expropriation of real estate;
- Determine procedures to follow in case of demolition of or damage to monuments.

The Regional Inspector of Monuments keeps the register of monuments situated in the voivodship. Items of cultural property are entered in the register by decision of the Inspector or Minister of Culture and Arts. The decision will be made on request of commune, owner or user.

Voivodships and communes are obliged to take care of cultural property and to include tasks related to the protection of monuments in local law and communal regulations and regional and local development plans and budgets. Regional and local development plans must be agreed with the competent Inspectors of Monuments.

To secure the protection of groups of buildings entered in the register of monuments, the Voivodes may define conditions for building activities in their territory on the request of and in consultation with the Regional Inspector, or order the removal, arrangement, or reconstruction of particular buildings or issue other appropriate regulations.

The Minister of Culture and Arts issues the regulations concerning investments in monuments and the rights of their users. He also influences financing of conservation works on objects owned by the State.

The Principal Inspector of Monuments is responsible for the implementation of protection policy within the framework of central and regional budgets. Advisory "Councils" support the Minister of Culture and Arts and Regional Inspectors of Monuments in the monuments protection system. The Councils give opinions concerning annual and long-term plans for monuments protection, budgets, new laws and regulations, as well as in the classification of cultural property as an "historic monument".

The law imposes some duties on owners or users of monuments. They must :

- Protect against destruction, damage or devastation;
- Inform the appropriate Regional Inspector of Monuments immediately if anything occurs that may be detrimental to the preservation of the monument;
- Inform the appropriate Inspector (within one month) if the monument changes ownership or has been leased, wholly or partially.

It is necessary to emphasise that a monument may be used exclusively in accordance with regulations on its protection and in ways that correspond to its assessed historic or cultural value.

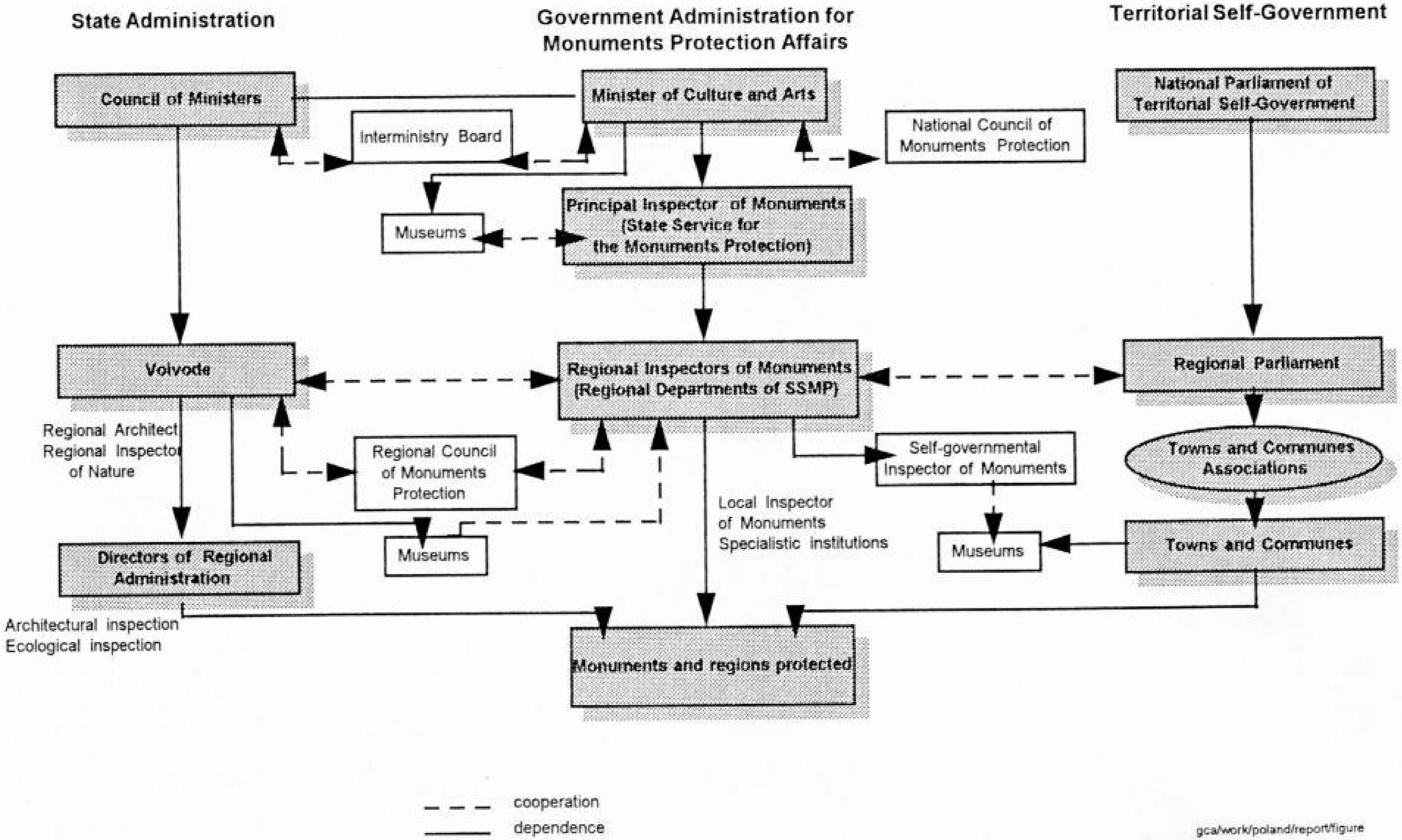
Figure 1 shows the system of monuments protection in Poland.

Monuments Conservation Workshops, a financially independent state enterprise employing about 500 people, specialises in all conservation works, including technical and scientific documentation, supervision and execution of conservation, as well as partial reconstruction of monuments. They conduct the following tasks :

- Administrative - activity related to use of monumental objects (buildings);
- Scientific/educational - research on historic, cultural and artistic values, as well as conservation and adaptation possibilities;
- Investment/executive - activity related to conservation, rebuilding, adaptation;

Figure 1

Organisation of monument protection



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- Information - publishing and popularisation of knowledge about the importance of monuments.

There are also a number of private companies on the market involved in conservation works.

4.2.3 Museums

Museums collect, store, and preserve cultural property, and conduct scientific research and educational activity. Museums also co-operate with legal entities and organisational units that implement tasks related to the protection of cultural heritage.

Museums may be state-owned or be the property of local communities and other legal entities, persons or organisational units.

Museums in Poland include:

- National (Warsaw, Kraków, Poznań, Wrocław, Gdańsk, Szczecin, Kielce, Rzeszów);
- Regional (e.g. in Gołub - Dobrzyń);
- Local regional museums;
- Special collection (e.g. Museum of Salt in Wieliczka).

Lately there has been growth in local authorities' interest in regional museum development, whose collections may emphasise the cultural potential of the regions.

State-owned museums are supervised by the Minister of Culture and Arts. A museum is managed by a director (head) who is appointed and can be dismissed by the Direct Inspection Authority.

At museums of special importance, a Museum Council is the advisory and consultative body for the director of the museum. The scope of activity of the council, its composition and structure are defined in the museum statutes.

4.2.4 Exploitation and financing of monuments

The Minister of Culture and Arts, based on Resolution 179/78 of the Council of Ministers, may give financial support of up to 23% of total costs for monuments' adaptation to useful purposes. This amount may be increased at its discretion.

Building law regulations allow capital allowances of 70% for repair (reconditioning) of such monuments. Expenses incurred to bring monuments to a good state of repair are tax-exempt, upon certification of the Inspector of Monuments.

Works related to protection or reparation may be financed by central (Minister of Finance) and regional budgets (Voivodes).

Figure 2 illustrates responsibilities for financing the protection of monuments.

4.3 The Example of English Heritage and National Trust in the United Kingdom

English Heritage and the National Trust play an important role in conservingbuildings and sites of historic and natural interest in the UK and could be interesting models for Poland.

The ***National Trust*** is an independent organisation with charitable status, but recognised by the British government in an Act of Parliament. In heritage terms, it is a "concerned" land- and property-owner; indeed, it is the largest private landowner in the country.

English Heritage is a government-sponsored body that gives advice on and grants for conservation. It is the government's principal advisor on England's historic environment. It is, in a sense, the guardian of the national heritage. Its sponsor is now the Department of National Heritage, which has its own Secretary of State (Peter Brooke). It used to be sponsored by the Department of the Environment and still deals with that Department regarding planning consents for listed buildings.

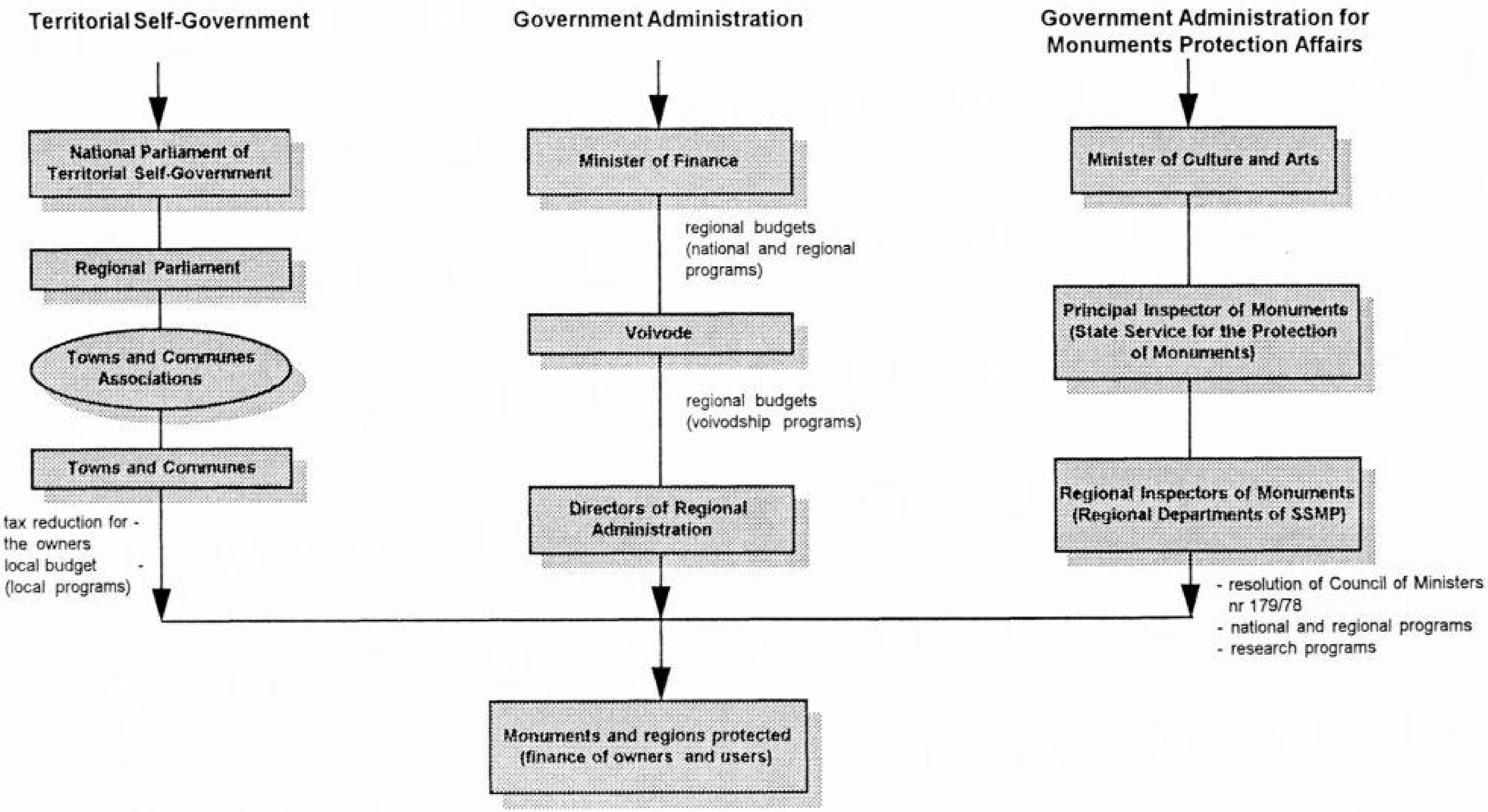
English Heritage is the authority which designates ancient monuments, historic listed buildings, and listed churches and cathedrals. It directly owns and manages 400 castles and other historic monuments (including Stonehenge) which the private sector, including the National Trust, has given up on. English Heritage maintains close links with local authorities who also play an important part in national heritage and conservation, and with the Church of England which also plays a role.

The role of the local authorities with regard to National Heritage is twofold:

- They have sole responsibility for approving grade 2-listed building works (grade 2 listing accounts for 94% of all listed buildings);
- They designate and control conservation areas, of which there are over 8,000.

Figure 2

Finance of monument protection



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The Church of England regulates itself regarding alterations to listed churches and cathedrals.

4.3.1 English Heritage

4.3.1.1 Sites

England has 13,000 ancient monuments (a list that is now being extended and is expected to increase to about 45,000) and 500,000 listed buildings -- including churches.

Of the listed buildings, only 2% are Grade 1, and 3.5% are Grade 2*. All the remainder are Grade 2, which used to be called Grade 3. Any work on, or demolition of Grade 1 and Grade 2* buildings must have the approval of English Heritage as well as of the local authority. Of the 30,000 or so grade 1 and grade 2* buildings, about 11,000 are churches. English Heritage has to be consulted on major changes to listed churches. Domestic properties form the majority of listed buildings. Grades 1 and 2* buildings, listed by category and percentage, are as follows:

Original building type	Total	Percentage Grades 1 and 2*
Agricultural	29,250	2.2
Ancillary	34,300	8.3
Commercial	25,550	5.7
Commemorative	19,950	4.8
Domestic	313,750	5.3
Garden landscape	6,500	15.4
Manufacturing/processing	3,100	4.8
Power	2,400	4.2
Religious	23,150	45.1
Street furniture	8,600	1.2
Storage	1,300	737
Transport	8,150	10.4
Other	24,000	
Total	***500,000***	

English Heritage owns and manages 400 properties, mostly old/ruined castles.

Regarding conservation areas, English Heritage has to be consulted in any proposals for conservation areas over 1,000 square metres.

English Heritage is also involved in Historic Landscapes, a grade of sites which has not yet been be fully designated. English Heritage is currently working with the English Nature and Countryside Commission, looking at battlefields and historic parks and gardens.

They have identified about 2,000 historic parks and gardens, and will grade them in the same way as they do historic listed buildings, but currently have no statutory powers.

4.3.1.1.1 How sites are selected

While it is officially the Secretary of State for National Heritage who decides which buildings are listed and which monuments are scheduled for statutory protection, English Heritage is responsible for advising him. For scheduled monuments, the process for selection includes:

- Classification of the many different types of sites;
- Characterisation of each classification (the main features);
- Scoring each characteristic of a site in terms of whether it is a good or rare example.

Most archaeological sites become evident from building of new roads or building works, and need to be reacted to.

English Heritage is encouraging local authorities to develop a database of historic sites and monuments. This is the main driving force behind the expected increase in protected monuments from 13,000 to 45,000. As many of these sites are ruins or 'below ground', it will not greatly increase the cost to English Heritage.

For listed buildings, there are very strict criteria for Grades 1 and 2*: for example the period of the building, the extent to which it is in its original state, whether it was built by a well known architect, whether it is a rare example of such work, etc. The building must be more than 30 years old. There are different schools of thought as to how to treat examples of 20th century buildings but there is a general consensus that some, such as the Royal Festival Hall (Grade 1-listed) should be protected.

The 8,000 or so conservation areas are selected by local authorities, who vary in their enthusiasm. All local authorities have at least one conservation area. Some have hundreds. Typically, such sites are old villages or parts of towns of special architectural or historic interest. Often, such areas contain several listed buildings which are, of course, listed separately.

4.3.1.2 Organisation and Interfaces

English Heritage employs a staff of about 1,650: 250 involved in managing historic properties; 340 custodians of historic properties; 370 included in restorating; 360 managing the conservation of listed buildings and scheduled ancient monuments; 150 in research and professional services; and 160 in corporate services.

It is organised in four main groups: Historic Properties, Conservation, Research and Professional Services, and Corporate Services. The first two groups are organised along geographic lines, the latter two are functional organisations.

The organisation is governed by a Chairman and 13 Commissioners.

It is supported by 13 expert and advisory committees, including, for example, the Hadrian's Wall Advisory Panel, the Cathedrals and Churches Advisory Committee, the Science and Conservation Advisory Panel, the Audit Committee, the Tax Review Panel.

4.3.1.2.1 How expenditure is administered

While English Heritage has various statutory 'sticks' to ensure that private owners and local authorities conserve the country's heritage, its main 'carrot' comes in the form of grants.

English Heritage paid out £ 40 million in grants in 1993, £32 million for maintenance and repair of historic buildings, and most of the remainder on rescue archaeology. Grants are split about equally between church and secular buildings. Typically, there are 400 to 500 applications from each, and about two-thirds are approved. The proportion of costs covered by the grant varies from 20% to 100%, and averages 40 to 50 percent. Grants are given mainly for Grades 1 and 2* buildings. Some local authorities give grants for Grade 2 buildings. Priority is given to buildings rather than furniture and fabrics. A limited budget of £ 1.3 million is assigned to National Trust properties (otherwise they could absorb half the budget).

Approval of grant aid depends on the following criteria:

- How important is the building?
- How urgent are the repairs (e.g. within two years)?
- Is there anybody else who can pay for it? Is it something the owner should be doing anyway as part of normal upkeep? Can he afford to pay? Would the work get done without a grant?

The cost of running and maintaining English Heritage's own sites is about £ 30 million, of which works and maintenance are about £ 10 million. Other operational and administrative costs of English Heritage amount to about £ 44 million, giving total expenses of about £ 114 million.

4.3.1.2.2 How English Heritage is financed

The major source of income is a Government grant given through the Department of National Heritage. This amounted to almost £ 100 million in 1993. Admission to properties and sales of souvenirs raised £ 9 million, membership fees £ 2 million, and rents and other sources about £ 3 million.

4.3.2 National Trust

The National Trust was founded in 1895 as a non-profit trading company by three people who foresaw an increasing threat to the countryside and historic buildings. The Trust's first property was a gift of 4.5 acres of cliffland in North Wales, its second a 14th-century timber-framed house in East Sussex. In 1907, the Trust was incorporated by an Act of Parliament with a mandate to promote the "permanent preservation, for the benefit of the nation, of lands and tenements (including buildings) of beauty or historic interest". An important provision of the Act was to grant the Trust a unique power to declare its properties 'inalienable', i.e. they can never be sold or mortgaged. However, the Trust can lease land, although only with the permission of the Charity Commission.

In 1937, a further Act of Parliament enabled the Trust to hold country houses and their contents, as well as land and ancient buildings. The Country Houses Scheme was developed, whereby a house with or without its contents could be presented to the Trust with a financial endowment to maintain it in perpetuity. In return, the donor and his family could go on living in the house, subject to public access and measures to retain the essential character of the property.

4.3.2.1 Sites

The Trust is the country's largest private landowner. It owns 232,000 hectares and holds protective covenants over a further 31,500 hectares. Its properties include 160 gardens, 60 villages and hamlets, 130 houses which it opens to the public, 534 miles of unspoilt coastline, farms and woodlands, windmills and water mills, part of Hadrian's Wall, various nature reserves, and examples of the country's industrial past.

Of the houses, 90 are large country houses and castles, and 47 are buildings associated with famous people: Sir Winston Churchill, Beatrix Potter, etc. Its open countryside includes Snowdonia in North Wales, the Lake District, and the Peak District.

4.3.2.1.1 How sites are selected

The main difference between the National Trust and English Heritage in this regard, is that, for the National Trust to take on a property, it has to be self-financing, either through endowment or through its ability to generate income and/or attract public support. The stated criteria for acquisition are fourfold:

- The property must be of national importance because of its natural beauty, historic interest or nature-conservation value, or of local interest because of the protection it would afford property already held for preservation;

- The property must provide benefit to the nation, which usually includes public access;

- The property must be in danger of deterioration if it is not acquired by the Trust, or of inappropriate alteration, or of development that would harm its character or environment;

- The property must be and be expected to remain financially self-supporting.

4.3.2.2 Organisation and interfaces

Day-to-day administration is carried out by a Director General and his executive staff in London, and 16 regional offices in England, Wales and Northern Ireland. The main head office functions and Management Board are:

- Historic Buildings Secretary (also Deputy Director General);
- Director for the Regions;
- Managing Director of National Trust Enterprises;
- Chief Agent;
- Director of Public Affairs;
- Director of Finance;
- Director of Personnel;
- Secretary and Solicitor.

The Trust employs a full time staff of about 2,900, and relies on a pool of over 8,000 voluntary room stewards who help guard properties and welcome visitors. The Trust also has 42 National Trust voluntary groups, totalling 2,000 people working on a variety of conservation projects. In addition, it organises working holidays for about 4,000 outdoor conservation enthusiasts.

Policy is determined by the Trust's Council which has 53 members, half of whom are nominated by organisations such as the British Museum, the Ramblers' Association and the Royal Horticultural Society, and the other half by Trust members at the annual general meeting. The Council appoints an Executive Committee which, in turn, appoints a Finance Committee, a Properties Committee, and regional committees around the country. Committee members have knowledge of estate management, architecture, fine arts, forestry, horticulture, publicity, marketing, finance and other relevant fields, and give their time and services free of charge.

The Queen Mother is President.

4.3.2.2.1 How expenditure is administered

The Trust continues to believe that the most cost-effective way of maintaining and conserving property is to keep it occupied.

It spent about £ 117 million in 1992 on:

Routine expenditure of running and preserving properties (includes general running costs, wages and general maintenance)	£ 41 million
Capital works and projects, e.g. major restoration works	£ 35 million
Property management	£ 13 million
Purchase of more property for conservation	£ 6 million
Conservation and other advisory services	£ 4 million
Non-property expenditure (includes membership/recruitment, publicity) fund-raising and administration)	£ 18 million

4.3.2.2.2 How the National Trust is financed

The National Trust is financed by a combination of membership support, capital endowments on specific properties, defined-purpose gifts and legacies, defined-purpose funds, grants from a variety of public-sector organisations, general gifts, and income and profits from properties and various enterprises.

National Trust membership is over 2 million, and is the largest source of income. The number of paying visitors to National Trust properties is over 10 million per year.

The National Trust has some 1,900 individual funds which fall into four categories:

- General Fund which provides for the net deficit of all other funds.
- Committed Maintenance Fund, which is set aside for General Fund capital projects after allowing for grants and other contributions, for projects which have already started, and expenditure planned for the following year. It is appropriated from the General Fund and from General Fund legacies.
- Defined Purpose Funds, which consist of gifts and legacies that must be used in accordance with the wishes of the donor. Capital and income can be used, and, until spent, funds are invested in stocks, shares, deposits, etc.

- Capital Endowment Funds, which relate to a particular property and which are endowed on condition that the capital will not be spent. They consist of farms, other property, stocks and shares, etc., and are used only for the purpose of generating income to pay for the upkeep, improvement and management of the properties to which they relate.

The amounts held in each of these funds were as follows at the end of 1992:

General Fund	£ 16 million
Committed Maintenance	£ 24 million
Defined Purpose	£ 129 million
Capital Endowment	£ 185 million.

These funds provided about £ 21 million of the total £ 117 million expenditure in 1992. The breakdown of the sources of income in 1992 was:

Membership income	£ 37 million
Direct property income (rents, admission fees, product sales)	£ 20 million
Investment income	£ 18 million
Grants and contributions (mostly from Government/ Local authorities)	£ 14 million
Net contribution from National Trust Enterprises (retailing, catering, holiday cottages, etc. -- turnover of £ 35 million)	£ 7 million
General gifts	£ 1 million
Drawing from funds:	
- committed maintenance	£ 12 million
- defined purpose	£ 9 million
- capital endowment	negligible

The net cash outflow before financing was £ 45 million and was derived from:

Legacies	£ 22 million
Appeals and tied gifts	£ 3 million
Grants	£ 14 million
Reduction in cash balances	£ 5 million

Appendix 5: Representative Product Plans

The Representative Product Plans presented in this appendix will form the basis for the personnel allocated to STU groups to develop comprehensive strategies and other plans. The first category (Sun & Beach) is developed in detail, with subsequent categories presented in "bullet" format.

5.1 Sun & Beach Product Category Plan

5.1.1 Description of sun & beach visitation category

The sun & beach summer holiday is the most popular holiday type in Europe. Millions of tourists spend their main holiday on the sunny, warm beaches of the Mediterranean coast. With or without children, tourists' principal motivation is relaxation and leisure (light activities) in a warm climate on the sea. A sandy coastline offers easy and natural activities for families with children. The water provides for all kind of activities.

The Atlantic coastlines of Portugal, Spain, France and Benelux, although colder, are also targeted by thousands of tourists. Poland's sandy beaches are a natural summer destination, except that unfavourable climatic conditions do not give Poland a competitive advantage.

Although the main mode of transport for sun and beach holiday makers on Poland's Baltic coast is the car, facilities should be close to the beach. Accommodation has to be value-oriented, i.e. offer the essentials at fair quality. Typically families seek self-catering accommodation/apartments, but half-board does offer some convenience.

Additional attributes of this product include an indoor/outdoor sports and leisure complex with shopping and catering facilities. Sightseeing trips should be offered to nearby areas, like old cities and monuments.

5.1.2 Demand for the category

5.1.2.1 Current demand

The domestic market is and will remain the most important source for the sun & beach visitation category. Our research showed that 30,6% of domestic tourists who took a summer holiday prefer this category. This percentages represent the biggest group of domestic summer tourists by far.

The size of this segment in this visitation category is similar to that in the adjacent German market, which is also the most important foreign market. Thirty-three percent of the mature West German domestic tourist market and 27% of the East German tourist market went to a seaside holiday in 1993 (BAT Freizeitforschungsinstitut, 1994).

To help target product development we analysed the life cycle of segments attracted by this type of holiday. Since there are no data available for the Polish domestic tourism market, the West German tourists will be used to indicate likely developments in the Polish domestic market.

The following table shows that families with young children and older tourists (early seniors and senior citizens) are the main segments for the domestic sun & beach visitation category.

Percentage of West German tourists taking a domestic sun & beach holiday

Coast	1993	1992
Average of all Germans	14%	13%
1) Teenager (14-17)	9	13
2) Teens (18-24)	**8**	12
3) Singles/Couples (25-49)	**8**	10
4) Families with kids under 14 (25-49)	**20**	**14**
5) Families with teenager (25-49)	15	**8**
6) Early seniors/Empty nesters (50-64)	**14**	**16**
7) Senior citizen (65-)	**16**	**20**

5.1.2.2 Trends in demand

Two main trends will influence the development of the Polish tourism industry: the change in travel patterns in Western Europe, and the dramatically changing perceptions of the Polish tourists.

The principal trend, to shorter, more activity-based and higher quality holidays, could improve Poland's competitive position by minimising the importance of weather conditions. Another trend in the family holiday is that, although the family travels together, each family member wants to pursue his or her own interests. Therefore, child care centres, diversified sport facilities, leisure offers, and soft animation will gain importance.

But the real challenge for the Polish tourism industry is the change in the expectations of the Polish tourists. Growing experience with Western quality standards and increasing disposable income will change the expectations of the Polish population. The resent changes in the use of accommodation by East German tourists might serve as a model for the likely shift of Polish demand.

Percentage of tourists	**West '92**	**East '92**	**East '91**	**Change East**
Hotel	33,4	24,9	19,8	+5,1
Guest houses, pension	18,5	16	15	+1
Holiday house(self catering)	14,1	15,7	14,1	+1,6
Friends & relatives	9,2	17,7	21,6	-3,9
Private room	7,3	10,3	15,3	-5
Camp mobile/ Caravan	5,1	3	2,5	+1,5

Source: Studienkreis für Tourismus

Private rooms and friends & relatives categories of accommodation show a significant decrease, while commercially operated accommodations, hotels and guest houses, improve.

5.1.3 Visitation category development strategy

5.1.3.1 Strengths and weaknesses, opportunities and threats

We examined Poland's strengths and weaknesses and opportunities and threats (SWOT). This SWOT analysis reveals that while Poland offers many of the natural attractions required for this holiday, including beautiful locations for facilities, it lacks the supporting infrastructure and quality and range of facilities in this category. Further, unless Poland upgrades to a higher standard, and disposable income increases, domestic tourists could spend on competing destinations with stronger attributes.

Strengths	*Weaknesses*
Wonderful sandy beaches	Unstable, not very favourable weather conditions
Historical hinterland	Low-standard/underdeveloped range of facilities
Beautiful locations for facilities	Underdeveloped supporting infrastructure (telecommunications, roads, public services)
History as a holiday resort (accustomed to holiday makers)	Entertainment/leisure offers not fully developed
Close to domestic and adjacent population areas	Road/rail connections not adequate
Price advantage	Diffused image/unknown positioning

Opportunities	*Threats*
Good natural assets for activity/theme-oriented holidays	Environmental problems/coastal water quality
Positioning on a value-for-money price advantage	Cost advantage disappears before quality improves
Structure of holiday centres offers potential for up-grading toward Centre Parcs-like resorts	Increasing disposable income draws people to competitive/alternative destinations with stronger attributes/appeal

5.1.3.2 Poland's competitive position

The SWOT analysis, combined with current demand and trends in demand, reveals that the current competitive situation is favourable, because most families cannot yet afford main holidays abroad, and the perception of quality is not yet up to Western standards. The Polish tourism industry has time to develop and upgrade its products and therefore to avoid losing guests to other destinations. In the medium term, it should build on the large domestic demand, which will increase with disposable income (along with trips abroad).

5.1.3.3 Product development strategy

The strategy to develop products in this visitation category is to give the category a focused identity as a sun-independent, activity-based holiday destination for the whole family in unspoilt nature. This will bring attention to the beautiful natural setting of the coastline, and its very good locations for facilities and accommodation. The climatic disadvantage will be downplayed by indoor activity centres, which will also serve to prolong the season.

In the beginning it will be necessary to develop and provide adequate accommodation of a range and style which meets the dramatically changing preferences of the domestic market and the expectations of Western clientele. The development of adequate facilities and accommodation should take precedence over marketing and promotion of these facilities until they have reached satisfactory levels of service for the targeted markets.

In the short term, the local domestic market should be targeted and the cash flow used to upgrade facilities.

5.1.3.4 Product priorities

A representative product in this visitation category will be defined by prioritising the products currently on offer in terms of each product component (attractions, facilities and services, accessibility, image, and price).

5.1.3.4.1 Attractions (natural, built, cultural, social)

The natural resources required for the main summer family holiday (sun & beach holiday visitation category) are a sandy beach and beautiful scenic setting. These must be sensitively developed in order to preserve the natural resources. Man-made and cultural attractions of the hinterland should be integrated into the sun & beach visitation category.

5.1.3.4.2 Facilities and services (accommodation base, catering, local transport, sport/activities, entertainment, other facilities, retail outlets)

The primary focus should be on the development of accommodation, facilities and related services to meet existing and future demand. Although the family holiday resort seems to be the major investment area for this product, self-catering, caravaning & camping, and farmhouses are an important part of the accommodation sector.

Funding must be secured for start-up development of appropriate accommodation for this holiday. For example, the Government should encourage private investment in private guest rooms through tax incentives and subsidy. Additionally, the Government should consider a room-approvement scheme for all types of accommodation.

Sport/activity facilities should offer sailing, cycling, equestry, walking, field and adventure sports, and nature study to minimise the negative impact of Poland's unfavourable weather conditions. These activities can be exploited in two ways. One is to rent the facilities and equipment; the other is to provide guests with light animation or courses, including itineraries and maps, organised tours, and training.

Entertainment is an important attribute of any tourism product. Events like traditional music, song and dance performances; theatre, concerts and other artistic events; cinemas and cafes; exhibitions and lectures provide diversion. Local festivals or theme-summers provide a good umbrella concept for different kinds of activities. Entertaining should be extended to accommodation facilities (mainly hotels, caravan parks, holiday villages) in the form of game rooms and activity centres as wet-weather assets.

A very important aspect of entertainment is child-caring centres for different age groups, which could become a purchasing criterion for families.

Local leisure/entertainment offers should be completed by shops and retail outlets. These should be service- and self-catering related -- groceries, washing salon/laundry, medical and health services -- and should offer shopping outlets for sport/leisure goods, textiles and luxury goods.

Although most people will use their own cars not only to drive to their accommodation but also for local transport, the community should operate a local transportation network, for example, on historic carriages/buses. These services could operate on a seasonal basis.

5.1.3.4.3 Accessibility (infrastructure, equipment, operations, regulations)

The main transportation modes for this visitation category is own car, coaches and sometimes trains.

Access by road must be adequate for accommodation capacity and development targets. Parking spaces/areas with integrated traffic flow controls should limit the local impact of traffic and deterioration of the product (e.g. town centres polluted by car exhaust).

Coaches should have special parking areas with services for the vehicle and driver (e.g. water supply, technical services, sanitary facilities). These coach service areas should be located close the beach, major attractions, and central sites like towns, hotels, etc. Touristic infrastructure such as information bulletin boards, wayside display maps, information desks, and sign posting would enhance user-friendliness and improve the perceived quality of the destination.

5.1.3.4.4 Image

The sun & beach visitation category should be positioned as a quality holiday destination in a beautiful landscape with a variety of sport and activity on offer. This positioning, based on standard but varied accommodation, should highlight the value-added through the activities.

5.1.3.4.5 Price

Pricing should indicate value-for-money according to national disposable income standards. US$10-20 should be the eventual price range of standard, "no frills" accommodation in rooms approved in the Government room-approvement scheme mentioned earlier.

5.1.3.4.6 Packaging and distribution

In tourism, packaging can take on the product creation role. The individual components of a tourism product are linked into one product and thus create a package sold for one price. The obvious example is the package tour, where destination, accommodation and transportation are integrated into one product with one price. There are two functions of the packaging, to reduce the complexity of the product and insecurity of the potential buyer, or to offer a price advantage.

The organisation of a tourism product depends on its complexity. Complexity of a holiday is mainly related to the distance of the destination and the language spoken; both increase the holiday maker's insecurity about planning and organising the trip. The more complex the organisation of a holiday trip the more pre-packaged products are used.

The other function of packaging is the price advantage, i.e. packages are cheaper than the individual components. The higher costs of pre-packaging a holiday trips are normally balanced by the higher purchasing power of the intermediaries.

The way a tourism product is distributed depends on the market and on the packaging in which it is to be sold. In principle, there are two ways to sell a tourism product -- either direct or through an intermediary, i.e. tour operator or travel agent.

In domestic markets, information on destination and transportation is readily available for planning and making the holiday trip. Therefore, there is no need for an intermediary. Facilities like hotels and holiday centres or specialised operations like health centres can sell their products directly to the customer. Small, individual accommodation entities, like guest houses or private rooms, use the services of intermediaries. Travel agents at the customer's location and local tourist offices in the destination offer information and accept bookings for these facilities.

Although facilities can become destinations in their own right, they are not perceived as separate products but form part of the local destination, the local area. Therefore, joint marketing and promotion programmes yield better results for the destination and the individual participants.

Adjacent markets need information on the destination and on booking possibilities. The sun & beach holiday product is not very complex, but intermediaries are unavoidable due to language barriers and unfamiliarity with the destination. Once an established Polish tourism industry serves more adjacent clientele and Poland becomes better known to its customers, direct distribution channels between the facilities and the guests will emerge.

In the international markets, in particular, the Adjacent West, an NTO would provide useful services in promoting the country and thus creating an image positioning. Therefore, the NTO should operate information offices in the main adjacent markets. Sun & beach holidays should be promoted in two ways. In the main market draw areas, Poland and its facilities could advertise directly to potential customers. This is to be co-ordinated with travel agents and tour operators in the source market. They should be encouraged to offer Poland's beaches to their clientele.

To focus joint efforts, the NTO should define the positioning of Poland's beaches and stimulate the trade to develop their offerings along this positioning. Supporting materials, like promotional literature, advertising, picture material, public relations, and marketing facilitation in form of travel workshops, journalist visits, familiarisation trips should be focused along the positioning as well.

The sun & beach visitation category should not be targeted at Western European or Overseas markets because Poland does not offer a competitive advantage over other destinations, located closer to its source markets.

5.1.4 Development opportunities

5.1.4.1 Geographical areas

Based on the work of the Institute of Tourism, there are five areas of existing or potential attractiveness, and, therefore, of development opportunities, in the sun & beach category:

- Szczeciński: The Szczecin Bay, Uznam and Wolin Islands, part of Trzebiatów Coast and Wkra Forest;
- Koszaliński: Part of Slowińskie Coast and Lakes Jamno, Bukowo, Kopań;
- Słupski: Part of Slowińskie Coast (listed in the World Biosphere Reserve), and Lakes Łebsko, Gardno;
- Helski: Hel Peninsula;
- Elbląski: Wisła Spit and Wisła Bay and Elbląg Height.

5.1.4.2 Representative product

We use a representative product, based on product priorities, to illustrate how Poland can develop its products and bring them to market.

One representative product for the sun & beach visitation category is a principal family holiday of two weeks, motivated by relaxation and leisure for both parents and children. The package is based on a coastal holiday centre within a forest and offers half or full board. Outdoor and some indoor sport and hobby facilities, with some light animation, are included in the centre. Maps and information for self-drive sightseeing trips are provided at a central information office.

The activities offered are a variety of water sports, out- and indoor activities like a play ground for soccer, basket and volley ball, table tennis, gaming on a small level. An additional service is a child care centre every morning which is operated by the holiday centre.

Purchased from a travel agency the package does not include transportation. The information provided for the booking is a brochure of the facility with an information pack of the local holiday community.

5.1.4.3 Representative facility

We also developed a representative facility, to demonstrate likely development of facilities within the sun and beach product category.

5.1.4.3.1 Description

The representative facility is a summer seaside holiday village designed to service the principal family holidays in individual units. Such units should be placed in landscaped grounds that are attractive and which are largely self-contained with heating, kitchenette, bathroom, etc. These will surround a central entertainment complex offering restaurants, bars, lounge area, entertainment and, where appropriate, indoor leisure activities such as pool and spa. A facility similar to Center Parcs in Western Europe would be appropriate.

The representative facility includes 300 chalets approximately 38m^2 and accommodating a family of four. In the first year of operations the average chalet rate is US$ 18 (excluding tax and other charges), and does not include any catering. The central complex will house a 250-seat multi-purpose restaurant with outside terrace to service fast food and take out; a specialised 80-seat restaurant; and two bars. Shopping facilities offer souvenirs, newspapers, hairdressing etc. Entertainment facilities should include cinema, pool tables, bowling, indoor swimming pool and spa with a good range of work-out equipment.

Outdoor amenities include water sports facilities such as wind surfing, sail boats, fishing, riding, conveniences on the beach and are well managed with good information.

Evening activities are based on light entertainment with dancing, live bands and periodic folk shows.

5.1.4.3.2 Facility feasibility

The projected rate of return for a seaside holiday village on the Baltic coast is almost 15%. To reach this level, and stimulate growth, the authorities will need to donate land as part of the attraction.

The financials of this investment call for investment of US$ 10 mln, of which 60% is equity. The balance of US$ 4 mln is financed over 15 years at 10% interest per annum. Two years are free of interest over the construction phase; Years three to five are interest only until the capital repayment schedule starts in Year 6.

5.1.4.4 STU

The sun and beach product group will be implemented by the holiday centre strategic tourist unit (STU 1). Locations of the local development organisations (LDOs) are indicated in Chapter 4, Product Development Strategy.

5.2 Recreational product category

5.2.1 Description of visitation category

- Location: Unspoilt natural environment in a beautiful landscape, located near a lake or in the mountains (for summer and winter)
- Transport medium: Most often own car, sometimes train or coach
- Length: One to three weeks
- Major activities: Relaxation and light outdoor activities
- Facilities used: Full range of accommodation (hotels, guest houses, private rooms, camping); holiday resorts becoming more popular
- Price level: Low to medium

5.2.2 Demand

5.2.2.1 Current demand

- 15-20% of outbound European holidays (ETDC)
- 15-20% of German tourists prefer countryside holidays; 10-15%, mountainous holidays;
- 20% of Polish domestic tourists go to lakes and forest areas, 10% to the mountains.

5.2.2.2 Trends

- High-quality accommodation with unique atmosphere and original experience.

5.2.2.3 Markets

- Mainly domestic tourism demand
- Some Adjacent West and East tourists
- Few Western European and Overseas visitors for recreational holidays

5.2.3 Visitation category development strategy

5.2.3.1 SWOT analysis

- Strengths: Vast, beautiful landscapes with historical hinterland
- Weaknesses: Underdeveloped tourist industry (facilities, services)
- Opportunities: Sensitive, sustainable development of natural resources
- Threats: Existing quality gap can deteriorate demand

5.2.3.2 Poland's competitive position

- Favourable: vast natural, unexploited resources and assets, close to major markets

5.2.3.3 Strategy outline

- Sensitive development of nature-based activities around natural assets (zoning of lakes, forests, mountains);
- Product development prior to product promotion;
- Building on existing domestic demand to upgrade facilities and services.

5.2.3.4 Product priorities

5.2.3.4.1 Attractions

- Zoning for natural resources (differentiated intensity of use);
- Extended sewage infrastructure;
- Integrated development of natural and man-made attractions.

5.2.3.4.2 Facilities and services

- Wide range of facilities, with a focus on capacity-extending accommodation during peak season (bed & breakfast, guest houses, private rooms);
- Exploitation of self-catering accommodation;
- Diversified offer of activities and leisure pursuit combined with light animation (courses, itineraries, guided tours);
- Theme-oriented entertainment and events, based on the locations -- nature, culture, handicraft, folklore, health, sport, song and dance performances, concerts, lectures, etc.

5.2.3.4.3 Accessibility

- Domestic-oriented access development
- Special services for groups (coach and train)
- Development of special interest-related infrastructure (e.g. bicycle tours, canoeing)

5.2.3.4.4 Image

- Activity-based nature experience in an unspoilt environment

5.2.3.4.5 Price

- Low-to-medium price level
- All-inclusive concept favourable (local sport infrastructure covered by a local tourist tax/fee on a daily basis)

5.2.3.4.6 *Packaging and distribution*

- On a European outbound basis, recreational holidays show the following packaging-character:
  - Approximately 50% of recreational holidays is not pre-booked;
  - Approximately 25% is partly pre-booked (mainly accommodation);
  - Approximately 25% is an inclusive holiday package.
- On a domestic basis, packaging depends on the transportation used;
  - Coach tours are pre-packaged
  - For car-based holidays, only accommodation is pre-booked or booked on the spot
- In international markets intermediaries have to be used according to transportation used
  - For car-based holidays, only accommodation is distributed (through travel agents or tour operator)
  - Tour operators, either by packages from local incoming operator or by themselves

- In Poland distribution is based on facilities and travel agents
  - Facilities distribute their products direct to the customer or use the services of travel agents
  - Coach tour operator buy accommodation contingents in advance and package them with coach transport, selling packages directly or through travel agents in their local markets

5.2.4 Development opportunities

5.2.4.1 Geographical areas

5.2.4.1.1 Lake and countryside

- Lubuski : Łagowskie Lake district and Rzepin Forest;
- Sierakowski :Miedzychód-Sierakowski Lake district and Noteć Forest;
- Drawski : Lake district and Drawski Forest;
- Charzykowski: lakes Charzykowskie and part of Bytów and Krajeński lake districts;
- Kaszubski : Lake district and so called Kaszubian Switzerland;
- Tucholski : Koronowskie Lake, rivers Brda, Wda, and Tucholski Wood;
- Ilawski : Brodnica and Iława lake districts and Elbląg Canal;
- Olsztyński : Lake district and the forest in its vicinity;
- Mazurski : Great Mazurian Lakes, part of Mrągowo lakes and Borecki and Pisz forests;
- Augustowski : Suwalskie and Augustowskie Lake Districts and Augustowska Forests;
- Biebrzański : Biebrza River and its vicinity;

- Białowieski : Białowieża Wood, including Białowieski National Park (listed in the World Biosphere Reserve);
- Gnieźnieński : Gniezno Lakes with Gopło lake;
- Kazimierski : vicinity of Kaziemierz Dolny and Nałęczów;
- Zamojski : East and Medium Roztocze and Solski Forest;
- Jurajski: Kraków-Częstochowa Upland and Trail of "Eagle Nests" (a number of castles);

5.2.4.1.2 Mountains

- Jeleniogórski : Karkonosze and Izerskie Mountains and Jelenia Góra Valley;
- Kłodzki : Kłodzko Valley, Śnieżnik Mountain and Mountains: Bialskie, Stołowe, Złote;
- Zywiecki : Beskid Zywiecki and Babia Góra Mountain;
- Zakopiański:Tatras and part of Podhale (highlanders' area);
- Sądecki : Beskid Sądecki, Gorce and Pieniny mountains;
- Bieszczadzki : Bieszczady Mountains and Solina Lake.

5.2.4.2 Representative products

5.2.4.2.1 Recreational lakeside holidays - Recreational sailing (Mazurian Lakes)

- Two weeks in rented sailing yacht with cabin
- Sailors from Poland, Germany and Western Europe
- Self-catering (on boat)
- Access by plane, car, or coach
- Lakes -- village marina and associated facilities and satellite facilities in remote lakeside locations
- Purchased from mainstream/specialist tour operator and through sailing organisations
- Representative facility: Lakeside marina resort

5.2.4.2.2 Recreational mountain holiday - Ecotourism

- Six nights in lodge/village in national park
- Customer drawn from wide range of environmentally aware special-interest groups (walkers, cyclists, horseback riders, fishermen, wildlife/botany, ecology discoverer, etc., no hunting)
- All inclusive (meals, accommodation)
- Access by car, coach, or by plane
- Forest/mountain lakeside location
- Purchased from special-interest tour operator or from local club/association in home country

- Representative facility: Mountain vacation village

5.2.4.2.3 Recreational mountain holiday- Golf-based

- Two weeks at holiday resort with golf course(s), tennis, horseback riding and other diversified sport and recreational facilities
- Holiday groups and families with strong golfing interests (but with family members interested in other activities)
- Located neat attractive area of historical and natural interest
- Self catering
- Distributed through mainstream or specialist tour operators in Germany, Scandinavia, Benelux and UK
- Representative facility: Mountain vacation village with or near golf course

5.2.4.3 Representative facility

5.2.4.4.1 Lakeside marina resort

- Marina port development with 60 to 80 berths
- Docking and service facilities
- 120-room marina resort
- Leisure and entertainment facilities -- restaurants, bars, shopping, etc.
- Average room rate starts at US$ 65 in the first year of operations

- US$ 12 mln investment in both marina resort and marina port
- A rate of return of 17% is likely to be realised

5.2.4.4.2 Holiday village - mountain

- Mountain holiday village in or adjacent to a forest or national park setting
- 100 Wooden Finnish style family chalets including heating
- Central public area including restaurant and lobby
- Average room rate starts at US$18 in the first year of operations
- Investment of US$ 6.5 mln shall yield almost 16% internal rate of return
- Additional health and leisure facilities decrease the internal rate of return to aprx 14% (with the same average room rate)

5.2.4.4 STU

- STU 1: Holiday centres
  - Lakes: Mazury (Mikołajki)
  - Moutains: Tatry (Zakopane); Karkonosze (Karpacz)
  - Snow: West. Beskidy (Karbielów); Karkonosze (Szklarska Por).
- STU 3: Special Interest Centers
  - Biebrza Swamp, bird watching
  - Częstochowa, religious
  - Nałęczow, spa
  - Białowieża, horseback, animal watching
- STU 4: Rural Touring Areas
  - Rural mountains: Iwonicz Zdrój, Bieszczady
  - Rural lakes: Czaplinek, Drwaskie Lake District; Kartuzy, Kaszuby; Iława, Iławskie Lake District

5.3 Touring product category

5.3.1 Description of product

- Transport medium: Most often coach
- Length: 4 - 15 days
- Major activity: Sightseeing
- Facilities used: 3 - 4 star hotel
- Price: Medium to high

- There are two types of touring holidays
  - Touring of a country with overnight stays in different hotels
  - Touring a region with a local base and day-trips to adjacent areas

5.3.2 Demand

5.3.2.1 Current demand

- No significant domestic demand
- Approximately 20% of European outbound holidays
- 11% of West German and 14% of East German holiday trips
- 12% of foreigners coming to Poland consider sightseeing one purpose of visiting Poland (representing 800.000 to 1.7 mln tourists)

5.3.2.2 Trends

- Touring holidays develop towards theme-oriented holiday tours

5.3.2.3 Main target markets

- Few domestic tourists will undertake touring holidays in own country
- The Adjacent market (West) offers the greatest potential for touring holidays in Poland - - groups via the tourism trade, special-interest associations and individual tourists via travel agents and direct marketing (classified advertisement)
- Western Europe and Overseas markets are already being developed through the tourism trade (groups)

5.3.3 Visitation category development strategy

5.3.3.1 SWOT analysis

- Strengths: Scenic beauty combined with an old history
- Weaknesses: Poor service standard within acceptable accommodation
- Opportunities: Conversion of "curiosity" tourists into loyal customers
- Threats: Poland's image as an "unsafe and underdeveloped" country deteriorates potential customers

5.3.3.2 Poland's competitive position

- Favourable to strong: Based on its current visitation (curiosity and roots tourism), Poland can develop a strong position in the touring market by upgrading facilities and improving service standards

5.3.3.3 Strategy outline

- Upgrade of facilities along the "main touring routes" to Western standards
- Improve service standards and supporting elements (itineraries, maps, sign-posting)
- Target theme-oriented touring holidays

5.3.3.4 Product priorities

5.3.3.4.1 Attractions

- Protection of landscape and natural beauty
- Preservation of man-made historic and cultural attractions
- Theme-oriented development, upgrading and integration of existing attractions (castles, cities, museums, monuments

5.3.3.4.2 Facilities and services

- Good quality, 3-4 star hotels, with restaurants and bars (limited additional facilities required within the hotels), mainly for groups
- Budget and 3-star hotels, mainly for individual touring tourists
- The hotels should be strategically located: near major routes, in historic cities (like Toruń), or near main attractions
- Decent, typical restaurants with unique atmosphere
- Local tourist offices to provide support services for groups and individual tourists on the spot

5.3.3.4.3 Accessibility

- Extension of border crossings
- Sign posting of roads and attractions
- Service stations for coaches

5.3.3.4.4 Image

- Positioning: A green country, rich in history and culture, that wants to be discovered

5.3.3.4.5 Price

- Medium, based on the quality of facilities used

5.3.3.4.6 Packaging, distribution and promotion

- Approximately 40-50% group business and 50-60% individual tourists
  - Touring groups: packaged and distributed via foreign tour operator -- mainly coach tours
  - Individual tourists: car-based packages (accommodation only) on a voucher basis, or booking on the spot in tourist information offices
- Promotion: mainly trade-oriented for foreign tour operator, travel agents and travel journalists

5.3.4 Development opportunities

5.3.4.1 Geographical areas

■ Northern tour:	Poznań, Warsaw, Toruń and Gdańsk; Wielkopolska, Pomorze, Mazury and Mazowsze region
■ Southern tour:	Kraków, Zakopane, Częstochowa, and also Warsaw; Małopolska, Podhale, Mazowsze regions,

5.3.4.2 Representative product - Roots/Heritage based touring holiday (around Kraków)

- Ten nights touring in Poland
- First two nights (and base) at Heritage Centre (visitor centre/museum with guides, historical themes videos/exhibitions, sign posting, roots discovery service, etc.)
- High-quality value-for-money heritage theme hotels nearby (even converted castles)
- Itineraries with sign posting for car and walkers--discovery trails
- Limited coach tour for four nights in other Polish locations
- Four nights available for discovery of home town/region by rented car
- Package purchased from specialist tour operator and ethnic club in home country (US, Israel, Germany, etc.)
- Root discovery service made available at time of purchase
- Representative facility: Heritage hotel

5.3.4.3 Representative facility

- Heritage hotel based on historic buildings
- 80 rooms and suites of four-star quality
- Additional services and facilities according to quality standard
- Average room rate of US$ 80 (excluding tax) at the beginning of operations
- Investment of US$ 9 mln needed, excluding renovation of the heritage building
- A rate of return of around 17,6% achievable

5.3.4.4 STU

- STU2: General Interest Tourist Centres
  - Warsaw
  - Kraków
  - Wrocław
  - Poznań
  - Gdańsk

5.4 City tours product category

5.4.1 Description of visitation category

- Transport medium: Plane, coach, train, car
- Length: 2 -5 days
- Major activity: Sightseeing, entertainment, relaxation, shopping
- Facilities used: 3 -4 star hotels
- Price: Depends on transportation and hotel category.

5.4.2 Demand

5.4.2.1Current demand

- Around 15% of European holiday trips; almost 30% of short holiday trips
- Almost 20% of West German and 22% of East German holiday trips
- Approximately 10% of Polish domestic holiday trips (according to the Arthur D. Little survey)

5.4.2.2 Trends

- City tours benefit from the general trend towards more frequent but shorter trips--city breaks are becoming more popular

5.4.2.3 Markets

- There is not a big domestic market for city breaks in Poland
- Adjacent and West European markets offer best potential
- The attractiveness of Poland's cities alone does not draw Overseas visitors

5.4.3 Visitation category development strategy

5.4.3.1 SWOT analysis

■ Strengths:	"New" old cities with strong historical background
■ Weaknesses:	Lacks typical city tours attributes--entertainment, shopping, infrastructure
■ Opportunities:	Positioning as "Fresh and new" cities, based on a long history 2. Pleasant add-on stay for all kinds of trips--business, recreational holidays, etc.
■ Threats:	Upgrading and improving of infrastructure and local facilities cannot cope with the increasing demand (e.g. Prague)

5.4.3.2 Poland's competitive position

■ Favourable:	Room for improvement of product attributes but not attractiveness, which does not compete on a true European level

5.4.3.3 Strategy outline

- Investment in infrastructure and local cultural activities (benefits the local population and tourism in general)
- Setting up of a local tourist infrastructure (tourist information offices, guide service, sign-posting in different languages, ticket services, management of museums, etc.)

5.4.3.4 Product priorities

5.4.3.4.1. Attractions

- Funding and managing of local attractions (museums, exhibitions, cultural events, etc.)
- Preservation of monuments and historical building and open to the public

5.4.3.4.2. Facilities and services

- Same facilities as for business--4-5 star hotels--will be used over the weekends
- 2-3 star, good-quality budget hotels
- Rich, diversified variety of restaurant and catering (fast-food)
- Special tourist offers on local transport (equipment, e.g. old buses, in prices, e.g. tourist weekend ticket)
- Attractive local cultural offers (theatres, concerts, cinema, exhibitions, etc.)
- Special events like Mozart week, Ballet days, etc.

5.4.3.5 Accessibility

- Good connections to national and international traffic systems (regional airport, local railway station, motorways)
- Special promotional offers for transport (weekend saver fares on air and rail tickets)
- Integrated traffic offers (e.g. local and regional transport included in tickets)
- Opening of and competition on local, regional and national traffic routes

5.4.3.6 Image

- Two positionings feasible:
  - Regional or national jewels--reflecting rich and long history
  - Worthwhile add-on to any kind of trips in the regions (business, visiting friends and relatives, holidays in the countryside)

5.4.3.7 Price

- Positioning as affordable city break
- Encouraging of the private sector to offer integrated packages (e.g. hotel, independent restaurant and local transport in one package)

5.4.3.8 Packaging, distribution, and promotion

- Bought through intermediaries (travel agent or tour operator) as a package or directly from suppliers (accommodation or transport)
- Packages are very attractive in conjunction with special events
- Distribution depends heavily on the service of supplier--hotels and transport, tour operator
  - Weekend offers of hoteliers
  - Weekend offer of transport companies (airline, railways) in conjunction with accommodation
  - Listing in tour operator brochures is crucial (sometimes for a fee)
- Promotion and advertisement of the city by the NTO or a city tourism association is crucial for the interest of the tourism trade (travel agents and tour operators)

5.4.4 Development opportunities

5.4.4.1 Geographical areas

- Warsaw, Tri-city Gdańsk and, above all, Kraków are in the first tier of the city break portfolio
- Second tier should include Poznań, Toruń and Wrocław
- Other cities should not be promoted for city breaks, but may offer potential for stop-over visits by touring visitors

5.4.4.2 Representative product - Short-term city break

- Two-night stay in city hotel for a couple
- Motivated by culture, entertainment, leisure
- Half-board basis
- Access by car (two to four hour drive)
- For domestic or adjacent markets
- Pre-packaged and purchased direct from the hotel or from travel agent

5.4.4.3 Representative facility

- Three star city centre hotel of approximately 200 rooms

- Room size 26 m^2
- Multi-purpose restaurant of 200 seating capacity
- Lobby lounge and bar for up to 80 seats
- All purpose room of 500 m^2 for up to 140 people
- Average room rate of US$ 56 in the first year of operations
- US$ 9 mln investment
- Internal Rate of Return of 17%

5.4.4.4 STU

- STU2: General Interest Tourist Centres
  - Warsaw
  - Kraków
  - Wrocław
  - Poznań
  - Gdańsk

5.5 Excursionist visitation category

5.5.1 Description of visitation category

■ Transport medium:	Own car, sometimes coach
■ Length:	Up to one day
■ Major activity:	Shopping, leisure, entertainment
■ Facilities used:	Shopping centre (if other than nature)
■ Price:	Product itself is free, price of activities should be relatively low, to be subsided by shopping facilities

5.5.2 Demand

5.5.2.1 Current demand

- 38.5 mln German excursionists in 1993
- 5.5 mln excursionists from other Adjacent markets

5.5.2.2 Trends in demand

- More demanding shoppers expect an entertaining environment and activities/facilities in addition to shopping
- Diversified offers/facilities for all members of the family (child-care centre, sport options for teens, beauty farm, etc.)

5.5.2.3 Markets

- Within two-hours driving distance from the facility/location

5.5.3 Visitation category development strategy

5.5.3.1 Strengths and weaknesses, opportunities and threats

■ Strengths:	Price advantage
■ Weaknesses:	Inappropriate infrastructure (including border crossings)
■ Opportunities:	Large German population draw near the boarder
■ Threats:	Decreasing price advantage is not met with increasing product quality

5.5.3.2 Poland's competitive position

■ Favourable:	Poland offers very good potential to develop a strong position in the shopping/excursionist markets, based on the current existing interest from adjacent Germany

5.5.3.3 Strategy outline

- Based on existing demand for development of shopping facilities in strategic locations to build-up loyal customer base
- Greenfield developments with special incentive (duty/tax free area)

5.5.3.4 Product priorities

5.5.3.4.1 Attractions
- For non-shopping excursionists, lakes and surrounding nature provide natural attractions
- For shopping excursionists, the shopping facilities themselves are the destination's attraction

5.5.3.4.2 Facilities and services
- A retail/leisure centre complex with shops, catering facilities (from top restaurants to fast-food), leisure offers (gaming, cinema, child-care centre, pool tables), integrated sport complex (squash, bowling, sauna, fitness centre, swimming pool)
- A small budget-priced hotel could be integrated ("Formula 1" concept)
- Large parking area with shuttle services
- Car service facilities, other than parking
- Supporting facilities like very good sanitary facilities, police, first-aid station, lost-and found service centre, post office, tourist information, etc.

5.5.3.4.3 Accessibility
- Accessibility is the most important key success factor after the facility itself
- Easy access with sign-posting in the wider draw area and information bulletin
- Free shuttle services from the main population draw areas
- Integrated traffic flow concepts in the near surrounding (including on-site traffic)

5.5.3.4.4 Image
- Positioning as shopping-plus facility, starting with the price advantage over Germany, but up-lifting of the image over the coming years to counterbalance the decreasing price gap

5.5.3.4.5 Price
- Main revenues are derived from the shopping facilities (rent, lease, management fee)

- Additional services like bus shuttle, leisure and sport facilities, should be partly subsided to encourage visitors

5.5.3.4.6 Packaging, distribution and promotion

- No packaging and distribution (since "entrance" to the facility is free)
- Promotion in the surrounding area is key for success (radio, information bulletins on the road, direct mail, advertisements)
- Free bus transportation to the facility should be part of the promotion

5.5.4 Development opportunities

5.5.4.1 Geographical areas

- Sites near the German border and Wrocław

5.5.4.2 Representative product - Shopping visitors potentially staying overnight at the complex

- Overnight or two-night stay for East Germans and Poles
- Motivated by shopping, with leisure and entertainment possibilities to lengthen stay (e.g. casino, small theme park, cinema complex, sport facilities)
- Access by own transport
- Near East German border or along major motorways
- Motel or hotel accommodation integrated or adjacent to a retail/leisure centre
- Purchased direct, either by telephone or on the spot
- Representative facility: Retail/leisure motel

5.5.4.3. Representative facility

- 60-room motor-way motel
- Approximately 25m^2 with bathroom/shower en suite
- Multipurpose restaurant with 80 to 100 persons
- Average room rate US$ 24 in the first year of operations
- Investment of US$ 2.5 mln for 60-room facility
- Yield may reach over 18%

5.5.4.4 STU

- STU 5:
  - North West --Szczecin
  - Centre West --Świebodzin
  - South West --Cieszyn
  - North East --Suwałki