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SPIS TREŚCI

FROM THE EDITORS

Dear Readers,

The 46th issue of our journal – which we hand over to you wishing you a pleasant reading – can be characterised as miscellaneous: it contains eight scientific articles, prepared by authors representing various fields and disciplines of science, and at the same time, various Polish scientific centres (with one exception).

The journal opens with three articles that deal with the issue of tourist activity, the last of which – based on surveys conducted among the Polish community in Chicago – additionally raises the issue of criteria for the selection of tourist destinations.

The first study is typically methodological in nature, and is probably the broadest overview of the methods of studying tourist activity that has ever appeared in Polish (and most probably not only Polish) literature on the subject. **Wiesław Alejziak** presents research on tourist activity which was conducted in various European countries from the end of World War 2 to the end of the 20th century. The analyses covered both research methods and techniques as well as ways of determining (expressing) tourist activity, trying in each case to address the issue of the possibility of comparing the results of various surveys (both on the national and international scale). Works published in Polish, English, German and French were subject to analysis. The main focus is on methodology, but the results of some surveys have also been analysed to some extent, which – despite some limitations in their comparability – have shown large variations in the level of tourism activity between residents of particular countries. The author proves that most of the research conducted in the entire analysed period were surveys, characterized by a great diversity of research methods and techniques, heterogeneous terminology and various criteria and typologies of tourist activity. The research also revealed the use of various indicators (measures) of tourist activity, which additionally hindered the diagnosis of the phenomenon and the interpretation of results, thus having adverse effects on the use of the research results in practice. The title of the work (in which the piece of information is included that it is the first part of an analysis) suggests that its author also intends to prepare an article that will be a chronological continuation of the analyses presented here, including works published already in the 21st century.

The second article, written by **Zbigniew Głąbiński**, is also devoted to tourist activity. The subject matter of the work, however, concerns mainly the determinants of this activity among elderly people. The main purpose of the work is to identify the main determinants of the tourist activity of the elderly in different countries, carried out based on a literature review. The author proved that among the most important factors affecting the tourist activity of elderly people age, health status, sex, nationality, income level, company of people while travelling, education and place of residence should all be mentioned. The author of the article emphasizes that the majority of results presented in it concerned single-use and short-term research and, at the same time, a specific social and geographical context – which makes the conclusions burdened with a certain degree of subjectivism, resulting, i.e., from the selection of sources. The study also emphasized that while in recent years in Poland one can observe an increase in interest in the tourist activity of the elderly among researchers, the question of the importance of this segment of the tourist market and the availability of offers for elderly people still requires awareness-raising activities. Therefore, the submitted work, regardless of its merits, may also contribute to the greater interest of representatives of tourist business and people responsible for tourism policy regarding this issue.

The third of the articles mentioned at the beginning deals with the conditions of the tourism activity of the Polish minority of Chicago, that is the largest cluster of Poles and people of Polish descent living outside our country. **Kamila Ziółkowska-Weiss**, irrespective of the analysis of literature, presents the results of her research in it, carried out on a very large (for usually difficult test conditions abroad) sample of 1,014 people, whom she divided for the needs of analysis into seven age groups. The research results showed the level and nature of tourism participation in the indicated group, while showing that the biggest barrier to tourist activity among the Polish minority of Chicago are: lack of free time, financial factors and professional work. It also turned out that people who form a single-person household do not travel more often than people who form multi-person households. Irrespective of determinants and barriers to tourist activity, the author also studied the factors determining the choice of destination, to which the subjects most often go as tourists. It turned out that in all age groups, factors that decide about it to the greatest extent are prices and the overall cost of the trip. Tourist development was in second place, and the third was fashion. The author also attempted to create her own model of tourist activity, in which she identified internal factors (demographic, social, cultural, economic) as well as external factors (geographical, political and legal factors and tourism organization).

The fourth article corresponds in a way with previous one considering the activity of elderly people. It concerns the tourist and recreational potential of forest areas, especially in the aspect of adapting them to the needs of elderly people and people with disabilities. **Sandra Wajchman-Świtalska** and **Roman Jaszczak** tackle this issue on the example of Poznań, trying to determine the current state and prospects for the development of tourism and recreation infrastructure in this city. Based on a literature review, the authors present the most important problems related to the adjustment of the forest environment to the needs of the indicated groups of people. The article presents the current status of municipal forest management in Poznań, trying to combine analyses in this area with data on the demographic perspective of the city.

Another article was written by an international team composed of: **Michał Roman, Lesia Zaburanna** and **Krystyna Krzyżanowska**. Their work deals with the development of agrotourism in Poland and the Ukraine. The authors make a diagnosis and attempt to determine the development prospects of this form of tourism in both countries studied. They use statistical data from the Ministry of Agriculture and Rural Development, the Central Statistical Office, the Institute of Tourism as well as domestic and foreign literature. The research confirmed the dynamic development of agrotourist farms in Poland and the much weaker development of this form of tourism in Ukraine, which – according to the authors – has, however, great potential in the field of multifunctional development of rural areas and development of agrotourism. Studies have also shown that in both countries, people living in rural areas are increasingly more interested in running agrotourist farms and presenting offers corresponding to the diverse needs of tourists, which in turn corresponds to the trend of increasing interest of urban residents in spending their free time in the countryside. However, potential agrotourists expect high quality services as well as a rich offer of leisure time organisation and management.

Beata Gierczak-Korzeniowska and **Grzegorz Gołembski** consider the possibilities for hotel companies of using benchmarking as a popular method of analysing the position of the company against the background of competitors (leaders), application of which in practice is still associated with certain problems. It is worth noting that the authors tried to recognize empirically whether – and if so to what extent – hotel companies use benchmarking. Although the results of the survey conducted among the directors of 12 hotels located in Poznań (i.e. 18% of all such facilities in this city) cannot be fully generalized, they revealed some interesting observations. It turned out that benchmarking is used by all examined hotels, but it is mainly used to improve the quality of customer service, improve the hotel's competitiveness and reduce the costs of its operation. Interestingly, less importance in this matter is attached to identifying and implementing new technologies. In the course of a more in-depth analysis using the basic statistical instruments, the authors also determined the diversity of managers' approaches to benchmarking in relation to two variables: categorization and affiliation to the network. It was also found that the managers of Poznań hotels basically do not look for patterns or good practices outside of their own industry and the group of the nearest competitors.

The last article in this issue is historical in character. Its author, **Iwona Cybula**, reviews the content of the weekly magazine *Wędrowiec [The Wanderer]*, published from 1863 to 1906, looking for content about tourism – as a new form of spending free time – and its development at that time. To this end, she analyses all, i.e. 2,289 issues of the magazine, seeking records and images concerning tourism as such, means of transport used by travellers, ways of facilitating organization and implementation of travelling (accommodation, meals, access to information), but also characteristic types of tourists and their attire, equipment and luggage. This very intriguing, in-depth analysis is an important contribution to a better understanding of how to travel, but also the perception of tourism in Poland at the end of the 19th century.

Even the authors of the articles briefly presented in this editorial analyse issues often quite far apart from one another and refer to various traditions and research methods, it in a sense reflects the nature of tourism as a subject of scientific reflection. That is why we remain hopeful that reading these works will be interesting for you. If it proves to be inspiring, it will be a signal for us that *Folia Turistica* fulfils its mission properly.

Bartosz Szczechowicz, Wiesław Alejziak

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RESEARCH ON TOURIST ACTIVITY IN EUROPE – METHODOLOGICAL ASPECTS AND RESULTS (PART I: THE PERIOD 1945-2000)

Wiesław Alejziak*

Abstract

Purpose. Analysis of research studies on tourism related activity carried out in various European countries in the period from the end of WWII to the end of the 20th century. The study embraced both the research methods and techniques, as well as the ways of expressing tourism activity, making an attempt at comparing the findings of various studies in each case (both on the domestic and international scale).
Method. The basic method used in the study was complex analysis of scientific literature pertaining to the research on tourism related activity (published in Polish, English, German and French), where focus was on research methodology. Also, the findings of the analysed studies were investigated to a certain degree, which – despite some limitations of research comparability – indicated serious disproportions in the level of tourism related activity among the inhabitants of particular countries.
Findings. The study indicated that the great majority of research carried out within the entire analysed period of time embraced surveys with a great heterogeneity of research methods and techniques, non-uniform terminology, as well as various different criteria and typologies of tourism activity. The study also revealed a great variety of used indicators (measures), which made proper diagnosis of the phenomenon and interpretation of the results additionally difficult. Hence, it impeded the potential use of research results in practical activity.
Research limitations and conclusions. The paper presents the analyses of research studies carried out until the year 2000. A similar study, based on the scientific literature published already in the 21st century, is in preparation.
Practical implications. The current study shows that at the end of the analysed period, traditional research methods and indices determining the level of participation in tourism (e.g. tourism activity rate) often did not allow for proper market analyses and required serious improvement (particularly in relation to research comparability and results obtained by various institutions). Reliable research studies have always been largely expected by the widely understood tourism branch as such data constitute a crucial factor not only in their current activity but also in strategic planning.
Originality. The paper presents one of the most comprehensive overviews of research studies on tourism activity, particularly in relation to the analyses of research methodology on this subject matter. New estimation methods and genuine indices of tourism-related activity were also proposed in the study, taking the hitherto mentioned conditions into consideration.
Type of paper. The paper is an overview analysing the findings of numerous empirical studies.
Key words: tourism-related activities, methodology, terminology, surveys, sampling, classification criteria, research comparability.

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Significance of research on tourist activity

The knowledge of distribution and tourist activity structure presently constitutes one of the basic indices of tourism policy. This especially applies to the policy concerning national tourism traffic. Studies on tourist activity are one of the most important sources of information regarding the level and structure of tourist activity. They are essential in determining the principle of functioning of the tourist market, optimal spatial and temporal distribution of tourism traffic and the organization of transportation and accommodation base.

The main goal of this part of the study is to identify people who do not participate in tourism and the reasons eliminating them from tourism traffic. According to this, subjects of tourism policy (utilizing proper instruments) may influence the demographic, social and professional structure of the participants of tourism traffic. Activity that shapes the general consumption of the society and the support of selected populations (or selected forms of tourism movement) is one of the factors of worldwide tourist policy [Guignand 1989].

Besides tourism policy, frequently considered on the macro scale, studies on tourist activity present great significance on the micro scale. They constitute the basis of company's marketing strategies and other subjects operating on tourism market. They also provide valuable information concerning the demand for tourist products within different seasonal and spatial profiles. Based on them, market fragmentation is performed according to several different criteria such as: form of tourism traffic, social and demographic features, aims and motives for departures, quantity and structure of expenses, preferences regarding place and time, etc. The knowledge of conditioning, level and character of tourist activity for tourist companies is due to the fact that "depending on age, psychological and cultural experiences, the social position, practiced profession, conscious interests, unfulfilled desires, observed value systems, tourist activity can be expressed in ways that do not always corresponding to the standards elaborated by the organizers" [Kowalewski 1978, p. 77]. These types of studies are also useful when planning and evaluating marketing activity, especially the efficiency of promotion and various means of distribution. Currently it is difficult to imagine efficient organization on travel and tourist markets without the knowledge of the level and structure of tourist activity.

The definition and conditions of tourist activity

The definition of tourist activity is rarely used in scientific literature. More often we can read about tourist consumption, participation in tourism etc. We can also encounter various ways of defining tourist activity. Quite often it is specified as an ensemble of activities linked with preparation and practice of tourism and various forms of behaviour after the arrival, for example, reminiscence, looking at photos taken, fixing tourist equipment [Alejziak 1993]. The definition refers to M. Boyer's triad [Boyer 1972, p. 14]: imagined journey (before departure), experienced journey (during) and prolonged journey (after the arrival). It can be assumed that the basic sign of tourist activity is the practice of tourism itself. In this elaboration we will therefore discuss the latter element of the triad, another words the actual participation in tourism. We will omit other forms of tourist activity such as: possession and systematic usage of sport equipment, literature (maps, guides), affiliation and activity in organizations, possession of authorizations and tourist awards.

Tourist activity depends on many factors: social, economic, cultural, political, etc. Because the influence of these factors varies, we cannot treat them separately. That is why some authors present tourist activity in the form of a function [Kornak 1979, p. 41]:

$$\mathbf{Wa = f\,(c)\,L}$$
$$\mathbf{c = x_1^{\,a},\ x_2^{\,b},\ x_3^{\,c},\ x_n^{\,d} \ldots\ldots x_i^{\,n}}$$
$$\mathrm{Wa} = (\mathbf{x_1^{\,a},\ x_2^{\,b},\ x_3^{\,c},\ x_n^{\,d} \ldots\ldots x_i^{\,n}})\ \mathrm{L}$$

where: $x_{1,}\ x_{2,} \ldots\ldots x_{n,}$ are the individual factors,
a, b, c .... n are the parameters associated with them,
L is random factors (illness, adverse weather conditions, war, etc.).

The existing studies on tourist activity enable us to ascertain that apart from size and structure of free time and tourist supply (mainly attractiveness, quality, access, price of goods and services), the following factors are decisive when it comes to the level and structure of tourist activity:

- **Economic** – income, furnishing household with basic equipment, car or other means of transport, subsidies and reductions;
- **Demographic** – sex, age, marital status, size of household, family status;
- **Social** – education, type of job and professional position, level of urbanization, environment and social origin.

It is easy to see that the variables mentioned are largely dependent. This determines the existence of significant disproportions in the level of tourist activity. They occur in every country and are independent in terms of size, political system and social and economic level of development. Studies show that the practice of tourism is mainly linked with a sort of "mental order" rather than money. On the other hand, character and amount of tourist consumption is visibly linked with a person's wealth. In other words, supply flexibility regarding goods and tourist services is greater than the demanded flexibility to practice tourism, which can be noticed in the level of tourist activity. As previously mentioned, basic information about conditioning factors, dependence and level and structure of tourist activity is provided by statistical research. A measure of tourist activity that is frequently used is the so-called tourist activity rate; it expresses the ratio of people participating in tourism relative to the general population [Labeau 1968].

Range of research development on tourist activity

Statistics was the first scientific branch to study tourist issues. It is assumed that statistical formulation of tourism traffic dates back to the 18th century. According to F. Schuhwerk [1930, p. 13], the first reliable statistical data that should be considered are the visitors' letters in renowned spas. J. Charvat, who studied tourism movement in selected spas, confirms this standpoint [Charvat 1966]. M. Hoffman expresses a different opinion. He claims, that statistical studies can be derived from the administrative obligation to notify local authorities of all foreigners present in a certain region. To prove this, the author states the instructions passed in Vienna and Innsbruck in 1450 and 1457, respectively [Hoffman 1966].

In the beginning, tourist research comprised mostly of issues associated with reception of tourism traffic. They included size and quality structure, regionalization, seasonality and incomes. Increase in significance of tourism (both as economic and social phenomena), marketing development and other tasks linked with tourism policy, resulted in the expansion of research areas, which also encompassed the issue of tourist consumption. This process was favoured by the growing competition, which resulted in the fact that reliable and valid information about conditions, level and structure of tourist activity were sought by many people.

Study polls, aimed at providing such data, were first carried out just after the end of World War 2[1]. Despite the fact that 50 years have passed since the first tourist consumption studies were conducted, and the fact that the research workshop was greatly refined, tourist statistics still possesses some flaws. Universal research methods and determination of tourist activity still lacks elaboration. Methodological problems are still the main cause of not being able to compare study results that were conducted by different research facilities in individual countries and also on an international scale.

Periodical studies of tourist activity in some Western European countries were commenced directly after the Second World War. Tourism quickly

[1] We consider national representative studies, since regional studies had already been carried out already during the interwar period. According to S. Leszczycki, in the years 1927-1935, poll studies relating to tourism traffic were conducted by several institutions [Ostrowski 1972, p. 65].

became an important and durable element of consumption. Due to this fact, analysis of participation in tourism was included in the studies on household consumption and individual persons. In the first period, the goal of these studies was to determine the general dependence between tourism and consumption. Later, their practical significance increased; this was due to the growth of tourism marketing (Gołembski 1980). Among many facilities conducting studies on tourist activity, an important role was played by public opinion centres.

1940s

The first national study aimed at determining the level and structure of tourist activity was a poll conducted by the French Institute of Public Opinion Study in 1946. This poll showed that the tourist activity rate (in vacation departures, which last more than 4 days) of French residents was 42%. In the 1940s, studies on tourist activity were conducted in Belgium, the Netherlands and Great Britain. France is one of the countries where we can follow in detail how the tourist activity in the last 50 years was shaped. In the case of other countries, such analysis is impossible. The most important studies on tourist activity conducted in the 1940s are presented in Table 1.

Tab. 1. Tourist activity in selected countries around the world in the years 1946-1949

Year	Country	Institution conducting studies	Tourist activity rate (% of people departing for vacation)
1946	France	Institut Francais d'Opinion	42
1947	France	Institut Francais d'Opinion	51
1947	Netherlands	Rijksdienst van het National Plan	56
1947	Belgium	INSOC	49
1948	France	Institut Francais d'Opinion	44
1949	Great Britain	Gallup Poll Survey	54

Source: [Labeau 1968, p. 44].

As it can be see, the countries that first undertook this research and have greatly influenced the improvement and expansion of studies are: France, Belgium and the Netherlands. It should be noted that studies conducted by the National Statistics Institute and Economy Studies (National de la Statistique et des Etudes Economiques) had started in 1951 and so far, have not been interrupted. They constitute the oldest periodical polls in the world.

1950s

In this decade, studies on tourist activity were carried out in several countries. Large divergence was visible in study results; this was due to the employment of various methods by individual institutions. The obtained results were different most of the time, even if they applied to the same countries or comparable periods of time. For example, two separate studies conducted in France (1946-1947) have indicated a 9% difference in the level of tourism participation. Due to the fact that in the analysed period of time (in France) no changes were visible in any of the basic factors that are dependent on tourist activity (living standard, level of education), methodological causes seem to be the only rational explanation for such a situation. A similar situation applies to studies carried out in Germany in 1952-1953. This is rather odd because the same institution as in the previous case conducted these studies.

Tab. 2. Tourist activity in the selected European countries in the years 1946-1961

Year	Country	Institution conducting studies	Tourist activity rate (%)
1951	**Great Britain**	**British Travel and Holidays Association**	**51*)**
1951	France	INSEE	49
1952	**Germany**	**Gesellschaft fur Marktforschung**	**25*)**
1953	**Germany**	**Gesellschaft fur Marktforschung**	**31*)**
1954	Netherlands	Central Bureau voor de Statistiek	41*)
1955	**USA**	**Institute for Social Research**	**61*)**
1957	France	INSEE	60
1958	Germany	Institut fur Fremdenverkehr	28
1959	**Belgium**	**INSOC**	**48*)**
1961	**France**	**INSEE**	**38*)**

*) Only such results are representative for the entire population. In the remaining cases, only selected groups were studied.

Source: [Labeau 1968, p. 44].

Among the countries listed in Table 2, residents of the US had the highest tourist activity (61%). It should be noted that American studies did not include travels at a distance less than 100 miles. This fact quite clearly decreases the value of the index when compared with other countries. We can also see that the lowest indices belonged to residents of Germany (25%), which are among the most active people on the planet.

1960s

In the 1960s, research on tourist activity was conducted in the majority of Western European countries as well as the USA. The first studies were commenced in socialist countries. Poland was among the countries which not only undertook these types of studies, but also contributed by adding new elements[2]. The information on research conducted in the 1960s and data on tourist activity for selected countries is presented in Table 3.

Tab. 3. Tourist activity in selected European countries in the years 1963-1967

Country	Year	Tourist activity (%) Domestic	International	General	Tourist stays abroad given in thousands of people
Norway	1967	67.0	11.0	78.0	329
Sweden	1967	52.0	25.0	77.0	1585
Denmark	1967	40.0	26.0	66.0	958
Great Britain	1966	50.0	10.0	60.0	4293
Switzerland	1966	28.5	28.5	57.0	1285
Netherlands*)	**1964/65**	**38.0**	**16.0**	**54.0**	**1392**
France*)	**1967**	**36.2**	**6.4**	**42.6**	**3500**
Austria	1966	26.0	14.0	40.0	774
Germany	1967	21.0	19.0	40.0	8914
Belgium	1966/67	16.5	17.8	34.3	1290
Poland*)	**1967**	**21.3**	**2.9**	**24.2**	**930**
Italy*)	**1966**	**18.7**	**0.8**	**19.5**	**312**
Yugoslavia	1963	10.0	2.0	12.0	240

Source: [Bąk 1972, p. 102].

If we compare this data with previous years, we can notice an increase in tourist activity regarding most of the countries presented in Table 3. The highest indices applied to Scandinavian countries, where the general level of participation in tourist travel (both domestic and foreign) is above 70%[3].

1970s

Analysis of research conducted in the 1970s depicts a further increase in tourist activity. Unfortunately, this increase was not accompanied by significant development of the quality of studies regarding tourist activity. The studies were conducted sparsely and the reliability as well as comparability

[2] More information on research conducted in Poland is presented in the latter part of this article.

[3] Tourist activity among US residents decreased noticeably - from 61% in 1955 to 51% in 1965 [Bąk 1972, p. 101].

of data was far from satisfactory. In the 1970s, attempts were made to introduce different ways of estimating statistical data and to employ new tourist participation indices. Sometimes, the indices differed quite a bit from the tourist activity rate commonly used in the 1950s and 1960s. As an example, we can mention the studies carried out by S. Ostrowski. He used statistical data published by various institutions and the official statistical yearbooks from individual countries. In his studies, he tried to compare tourist activity in 15 countries; 8 countries belonging to Western Europe and the remaining 7, to the so-called socialist block. He obtained the indices of tourist activity by referencing (dividing) the number of official tourist trips to the general population of a given country.

Tab. 4. Tourist activity in some European countries in the year 1976

Country	Population (in millions)	Number of domestic tourist trips (in millions)	Coefficient of tourist activity in terms of domestic trips (%)
Austria	7.5	4.5	60.0
Czechoslovakia	14.9	7.5	50.3
Spain	40.0	22.8	57.0
Netherlands	13.8	8.1	58.7
France	52.9	26.8	50.7
Yugoslavia	21.6	10.1	46.7
East Germany	16.8	3.5*	20.8
Poland	34.4	15.4**	44.8
West Germany	59.5	38.6	64.9
Romania	21.4	8.1	37.8
Switzerland	6.4	6.6	103.1
Hungary	10.9	3.9	36.8
Great Britain	55.9	37.5	67.1
Italy	56.2	28.5	50.7
Soviet Union	256.7	32.0*	12.5

* Does not pertain to travel registered in official national statistics.
** UNWTO data decreased by the share of foreign tourists and increased by the number of tourists using leisure hostels and pensions.

Source: [Ostrowski 1979, p. 124].

The method of tourist activity estimation proposed by S. Ostrowski created some ambiguity. For example, the tourist activity index calculated for Switzerland attained a value equal to 103%. Considering the traditional methods of estimating tourist activity rate, this is clearly impossible. In addition, S. Ostrowski achieved comparison only in terms of domestic travel. He claimed that in case of international travel, a “comparative breakdown for this type of tourist activity would be possible only in reference to socialist countries. This is due to the circumstance that neither national statistics nor the official

World Tourism Organization database have information concerning international travel" [Ostrowski 1979, p. 126]. This remark is rather odd since S. Ostrowski, being a renowned scientist, surely had access to this type of data and could employ them in such analysis[4]. Information concerning the amount of international travel in individual countries was provided by UNWTO statistical publications and national statistical yearbooks.

It should be pointed out that comparative studies on the activity of foreign travel in the 1970s, which determined their level in the percentage of individuals participating to the entire population (namely in the form of tourist activity rate), were rarely conducted. According to P. Aderhold [1978], the level of participation in international travel in some countries was the following: Italy (7%), Norway (13-20%), France (23%), Great Britain (26%), Sweden (29%), Belgium (27%), Denmark (40%), Austria (46%), the Netherlands (57%), Germany (60%) and Switzerland (70%).

Since there are no collective comparisons of tourist activity available in the scientific literature, we chose to present a breakdown according to independent sources. Caution is recommended when analysing the table obtained in this manner. This table shows the results of studies conducted in different time frames of the 1970s.

Tab. 5. Tourist activity in the selected countries during the 1970s

Country/Year		Participation in tourism (%)	Country/Year		Participation in tourism (%)
Poland	1970	30.5	France	1973	49.0
Poland	1973	39.0	France	1975	52.0
Poland	1975	59.0	France	1980	56.2
Poland	1978	57.0	Italy	1975	35.0
Poland	1980	40.0	Italy	1982	43.0
Germany	1970	46.1	Netherlands	1980	70.0
Germany	1973	50.1	Austria	1975	36.1
Germany	1975	55.9	Austria	1978	35.6
Germany	1978	63.1	Great Britain	1971	59.0
Germany	1980	65.2	Great Britain	1980	62.0
Switzerland	1976	74.0			

Source: Own elaboration based on: [The TTG World Travel Report …. 1997] and [Kornak, Montygierd-Łoyba, 1985, p. 236].

The results presented in the table above depict a great variety in the level of tourist activity of individual countries, even when we consider that studies were conducted at relatively small time intervals. We can have doubts as to whether the tourist activity in Poland in just two years could

[4] It seems that lack of this type of analysis could have political backgrounds. Low indices of tourist activity among Polish residents (compared with Western Europe) were surely not favored by communist authorities.

increase by 20%, which is indicated by studies conducted in 1973 and 1975. It may be possible that the increase was caused by the usage of different methodology.

1980s

The turn of the 1970s and the beginning of the 1980s mark a period of intense activities undertaken by WTO. Their goal was to standardize statistics into a domestic sphere of tourism movement and tourist activity[5]. Shortly after, other foreign organizations were incorporated for this type of activity; especially, the Organization of Economic Cooperation and Development and institutions responsible for the development of tourism in the European Economic Community[6]. During the Sixth Session of the WTO General Assembly, which took place in September of 1983 in Sofia, a resolution was passed, ordering to continue work on research accord regarding

Tab. 6. Tourist activity in selected European countries during the 1980s

Country/Year		Participation in tourism (%)			
		Minimum 1 domestic long-term trip	Minimum 1 domestic short-term trip	2 or more domestic trips	Foreign trips
Austria	1984	38.1	25.5	30.9	50.3
Belgium	1985	48.0	13.0	31.0	62.5
Finland	1985	49.7	38.5	21.3	30.3
Luxemburg	1985	–	–	–	58.0
France	1985	57.5	–	–	15.3
France	1986	58.2	–	–	16.7
Germany	1984	55.3	32.1	9.9	64.0
Germany	1985	57.1	32.5	7.8	64.8
Germany	1986	57.0	31.6	8.2	65.1
Ireland	1984	47.0	17.0	8.0	44.4
Ireland	1985	51.0	19.0	7.0	40.1
Ireland	1986	39.0	16.0	5.0	55.5
Italy	1985	46.0	–	11.7	55.5
Portugal	1985	29.0	–	–	–
Portugal	1986	28.0	19.0	21.0	8.0
Great Britain	1985	38.0	47.1	23.0	18.0
Great Britain	1986	40.0	45.0	20.0	20.2

Source: Own elaboration based on: [Yearbook of Tourism Statistics. WTO 1989, p. 44-57].

[5] Earlier, such activities pertained mainly to international tourism.

[6] Since the 1970s, the European Tourist Committee attempted to initiate cooperation among its members in the field of tourist statistics. These efforts did not bring encouraging results in studies on tourist activity.

tourist activity. It was acknowledged that it is absolutely necessary to determine the range, goals, field and the basis of studies. The task was also to lay out a minimum of homogeneity needed in the general field of methodology, gathering information and other study aspects (result presentation for example) [Harmomization of households 1989]. Unfortunately, these initiatives did not change the general situation. To confirm this, we should mention the studies that were conducted in several European countries shortly after the cited resolution was published.

The quoted studies revealed vast disproportions in the level and structure of tourist activity. Apart from that, in many cases, they differed from the study results obtained earlier and from reports prepared by independent institutions specialized in such analysis. According to the report prepared by the "Horwath & Horwath" consulting company in the early 1980s, we could distinguish four basic levels of tourist activity. Most countries (members of EEC) are located within four basic levels as follows: above 70% – the Netherlands, Austria, Norway, Sweden, Switzerland; 50-70% – Denmark, France, Germany, Great Britain; 40-50% – Belgium, Ireland; less than 40% – Portugal.

In the meantime, studies presented in Table 6 depict the surprisingly low level of tourist participation in case of Great Britain. In 198,5 residents of that country appeared to be less active than Irish citizens; both in terms of domestic (13%) and foreign travel (22%). As we can imagine, this was the result of the different methodology applied. In particular, it concerned the difference in classifying trips, recognized as being tourist-related. More extensive analysis of the study presented in Table 6 will be discussed in the latter part of this paper. As opposed to the majority of studies, the official WTO statistical yearbook (published here) presents selected information on the methods and techniques that were used.

1990s

Up to this point, certain national research institutions conducted the presented studies in various countries independently. Surely, this was a very important reason to claim reservations regarding such studies, especially when making international comparisons. It became evident that even studies conducted under the supervision of a single institution do not solve all problems. In 1990, by the order of the European Commonwealth Committee, studies on tourist activity were carried out. The studies included 385 million people in Europe above the age of 15. Studies were conducted in every country belonging to the EU and EFTA, and in selected post-communist countries (Poland, Bulgaria, Romania, Hungary). The most significant results are shown in Table 7.

Tab. 7. Tourist activity indices of European citizens in the year 1990

Country	Participation in tourism (domestic and international)		Country	Participation in tourism (only international travel)	
	Index in %	Trips per one tourist		Index in %	Trips per one tourist
Iceland	87	5.7	Luxemburg	62	2.4
Finland	83	9.5	Belgium	54	3.8
East Germany	82	3.4	Switzerland	54	2.8
Norway	79	8.5	Netherlands	53	2.7
Sweden	79	13.0	Finland	51	2.1
Spain	76	6.4	Sweden	47	3.3
Switzerland	75	4.9	Norway	44	2.8
Netherlands	74	6.2	Denmark	43	3.3
Belgium	67	5.2	Austria	41	2.5
Great Britain	67	4.0	West Germany	38	3.9
Luxemburg	65	3.0	Iceland	37	1.6
West Germany	64	4.8	East Germany	32	1.6
Denmark	63	7.9	Ireland	3128	1.5
Ireland	63	3.4	Great Britain	24	2.1
Italy	61	3.6	Czechoslovakia	20	2.3
Austria	59	5.0	France	20	1.7
Bulgaria	58	11.1	Yugoslavia	18	2.7
France	58	4.0	Hungary	16	4.5
Greece	56	5.1	Italy	15	1.8
Portugal	51	5.3	Romania	14	2.2
Yugoslavia	49	5.3	Greece	14	2.1
Czechoslovakia	42	6.0	Spain	13	2.2
Romania	36	6.3	Portugal	10	2.3
Hungary	32	6.6	Bulgaria	8	2.3
Poland	22	4.9	Poland	26	3.3
Overall Europe	60	5.1	Overall Europe		2.4

Source: Own elaboration based on: [European Travel Monitor, European Travel Data Center, 1993, p. 95] and [Łazarek 1999, p. 104-105].

The studies showed that in the year 1990, a total number of 229 million people in Europe travelled, with at least one accommodation outside their place of residence. The average tourist activity index for every country included in this study (both domestic and international travel) reached 60%. The majority of trips were taken in one's homeland. The activity index referring exclusively to domestic travel was 46%, meanwhile, in case of international travel, it was only 26%. International travel (comprising of about $^1/_5$ of all travel), featured significantly lower number of journeys occurring per one tourist (2.4 average).

Results presented in the previous table raise some doubts. They relate to some countries in which the obtained results basically depart from those obtained by national institutions in individual countries. As an example, we mention Poland, where the tourist activity rate equal to 22% seems noticeably decreased. Studies conducted by Polish institutions, monitoring tourist activity in 1990, appeared to have totally different results. According to the Tourist Institute, both in domestic and foreign travel, 53% of Polish residents participated (people over the age of 15). If we even include participation in long-term travel (at least 5 days), it comes out to 34%. Since the study included all trips beyond the place of residence (they were accompanied by at least one accommodation), we should also consider short journeys in which 33% of Poles participated. In this case, reservations relating to the information presented in Table 7 seem to be justified. The same applies to foreign travel, in which 12% of Poles participated (not 8% as shown in cited studies) [Laciak 1997, p. 15].

This can be related not just to Polish data. The information stating that in 1990, residents of Eastern Germany were more active than residents of Western Germany, is rather doubtful. It is also strange that the most active tourists in Europe come from Iceland. In this country, the tourist activity rate reached 87%, a level that has not been attained in any other country. Unfortunately, the cited article does not provide information on the study methods, especially the representation of samples that were used in polls. These unclear situations were confirmed by studies done in 1994. The obtained results appear to reflect the actual level of tourist activity in different EU countries.

Tab. 8. Tourist activity of UE citizens in the year 1994

Country	Tourist activity %	Country	Tourist activity %	Country	Tourist activity %
Germany	78.2	Greece	48.0	Italy	54.0
Austria	62.0*)	Spain	44.0	Luxemburg	80.0
Belgium	63.2	France	62.0	Netherlands	69.0
Denmark	71.4	Great Britain	60.0	Portugal	29.0
Sweden	6.0	Ireland	60.0		

*) Data -1991.

Source: [Py 1994, p. 26].

One of the more interesting studies on tourist activity in various European countries was carried out by the order of the European Committee in 1998. Residents of every country belonging to the EU (a total of 15) participated in these studies. These studies were probably the first as far as utilizing homogenous methodology and comparable periods of time are concerned. The European Network of Market and Public Opinion Research and EUROSTAT coordinated the research. Direct questionnaires in individual countries were carried out by agencies which cooperated with the previously mentioned institutions. The studies included all trips (foreign and domestic) with at least four accommodations outside the place of residence. The studies included national samples of persons who were over the age of 15. The number of these samples depended on the size of the entire population. Altogether, 16,186 people were questioned, which according to EUROSTAT, validates these results as being representative on the largest, homogenous tourist market in the world (reference to EU). The results were published in the "The Europeans on Holidays 1997-1998" materials and were versatile [Facts and figures 1998]. The most crucial results of these studies are presented in Table 9.

Tab. 9. Tourist activity of UE citizens in the year 1994

Country	Tourist activity (%)	Country	Tourist activity (%)
Denmark	75	Germany overall	51
Netherlands	72	*Western lands	50
Sweden	70	*Eastern lands	53
Finland	67	Spain	48
Luxemburg	64	Belgium	47
Great Britain	58	Greece	43
France	54	Austria	42
Italy	52	Ireland	39
		Portugal	34
European Union overall – 53%			

Source: [EU 1998, p. 1].

As it can be seen, the studies revealed large divergence both in terms of level of tourist activity, in individual countries and in terms of results obtained in previous studies. The results lead to the conclusion that residents of northern Europe are more active (in terms of tourist activity) than people living in its southern regions. This is evident not only when comparing the basic index – tourist activity rate, but in practically every analysed aspect (departure frequency, foreign travel rate, expenses, etc.). Among 47% of the questioned tourists, who did not go on vacation in the analysed period of time, 28% of them had participated in travel a year or two earlier. It turned out that 18% of EU residents have never been on vacation defined in such a way (that is, 5 day minimum trip). On the other hand, people from other European countries participated in this type of trip several times a year. $^1/_3$ of people departed for trips at least twice, 11% – 3 times, and 3% – 4 times or more.

Research in Poland

Market studies (in principle they are aimed at studying the conditions, level and structure of tourist activity) in socialist countries developed rather slowly compared to countries dominated by free market economy [Bosiacki 1990]. These types of studies began in Poland in the 1960s. The institution that started these studies was called the Public Opinion Research Centre, operating under the Committee for Radio and Television Affairs. In 1961, by the order of the Chief Committee for Physical Culture and Tourism (Department of Tourism more precisely), such studies were carried out. The studies featured different types of questionnaires. They were conducted on a representative population sample (adults), which was determined on the basis of proportional selection according to the following criteria: sex, age, social affiliation and size of place of residence [Strzeszewski 1962]. In the past 40 years, only a few institutions and research centre conducted representative studies. They can be divided into four groups based on their goals, range and methods of study:

- Studies carried out by the Public Opinion Research Centre (CBOS);
- Studies carried out by the Central Bureau for Statistics (GUS)
- Studies carried out by the Tourism Institute (IT).
- Studies carried out by the research centre in Poznan chaired by S. Bosiacki,

The quoted institution conducted studies at different periods of time; each institution had a specific atmosphere. In the beginning, most studies resembled polls; this was due to the fact that the involved institutions specialized in sociological surveys. The Central Bureau for Statistics introduced more widespread studies conducted on greater samples in the year 1970. It should be emphasized that the Central Bureau for Statistics rarely studied the aspect of tourist activity[7]. Interesting studies were presented by a group of scientists from various institutions located in Poznań (mainly from the Economic Academy and Academy of Physical Culture) [Bosiacki 1987].

Each institution mentioned above, employed different methodology. The principle difference concerned the basic statistical units that were surveyed. Most research centres studied individual people, but in the case of Poznań, an entire household was analysed. Studies done by the Central Bureau for Statistics (depending on the needs) employed both study methods. Differences also related to the range of studies. For example, in the case of studies performed by the Public Opinion Research Centre, scientists were only interested in basic signs of tourist activity (level of participation). The group headed by S. Bosiacki conducted complex studies regarding the en-

[7] For example, in 1970s, they were resumed only once, in 1973.

tire tourist consumption sphere (including expenses, financial sources, etc.). Finally, the Central Bureau for Statistics carried out studies with different profiles depending on the type of studies.

In the years 1969-2000, the Central Bureau for Statistics conducted four studies related to the usage of vacations (1969, 1978, 1981, 1985) and three other concerning participation in tourism (1986, 1995, 1998). Besides tourist participation studies, the issue of tourist activity appeared in other studies conducted by this institution. Vast information on this subject was provided by periodical studies of household budgets and studies on standards of living in them[8]. Tourist activity was also mentioned in the Central Bureau for Statistics – their studies related to participation in sport and recreational movement (1999), and also in studies carried out among specific social groups and their environments (among children in 1978 and among the elderly in 1987). Information on tourist activity of Polish residents is provided by studies on time budgets conducted in 1969, 1976, 1984, and pilotage studies in 1996 [Slaby 2000, p. 7-16].

Recently, based on studies conducted in the EU[9], participation of Polish residents in tourism is being monitored. This means that studies are conducted every year, by employing relatively comparable methods. Since 1990, by the commission of the ministry responsible for tourism development in Poland[10], studies are conducted by the Institute of Tourism. It should be noted that during these studies, experience gained by other research centres was utilized. The studies were conducted on the basis of a representative sample (the Public Opinion Research Centre), which is selected according to layer proportion draw [Laciak 1999].

Study methods in tourist activity

Tourist activity studies can be defined as activities aimed at detecting dependence between various factors and participation in various forms of tourism. They are based on seeking the reasons and regularities, which relate to different phenomena, comparison of the present situation with the past, etc. They require greatly-detailed information coming from various sources. There are usually two basic types of sources: widespread, comprised of mass statistics and partial, comprised of representative and monographic studies [Walle 1997].

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[8] We should especially mention the monitoring studies of poverty carried out during 1995-1996, and repetitive studies on that subject in 1997, 1998 and 1999 [Latuch 2000, p. 17].

[9] For example, within the confines of the European Travel Monitor Centre.

[10] First, the Department of Physical Culture and Tourism, next, the Ministry of Transport and Marine Economy and the Ministry of Economy.

According to S. Bosiacki, "the majority of data useful in analysis and tourist market studies are beyond the reach of statistics. Those that are accessible cannot be employed to manage active marketing policy on any level (national or within the company). It was impossible to determine a homogenous scale of demand for goods, tourist services and the factors affecting them. It was also impossible to grasp the regularities occurring on the tourist market. This situation compelled scientists to seek new sources of information, to carry out these studies. It was necessary to introduce original information which could be obtained through empirical studies." [Bosiacki 1990, p. 205]. Studies on tourist activity belong to this group. Depending on the goals and usage of a specific approach, tourist activity studies can be presented in various forms:

- Study polls of permanent residents (place of residence, work);
- Queries in institutions that organize tourist trips (travel agency, social branch, workplace) and other institutions;
- Measurement of tourism traffic at the time of departure from place of residence (mainly with regard to weekend travel) [Matczak 1990].

The information is generally gathered via questionnaires, which relate to different time periods. Usually, they are expanded and concern various aspects of trips. Their basic measure is the number of people (or household) that participated in the trip. The obtained values are listed according to various criteria, depending on the aims as well as the number and type of planned analysis. Analysis is performed by using basic methods of descriptive statistics. First, we group the data, afterwards, multiple element charts are constructed. Data in these charts is given in percentages; that shows the relation between individual elements. The results are studied individually (usually, they make no sense). Comparing them with other data provides desired information.

According to A. Matczak [1982, p. 68-69], "construction of single element charts is the starting point for analysis. The significance is so small that it is necessary to supplement them with subsequent features". In this case, multiple element charts are developed, which enables detection of the correlation. Frequently, responses to problematic questions are correlated, including social and economic features presented in the certificate. Since the studies are representative (partial), usage of statistical induction is necessary. The method based on the calculus of probability allows to make remarks and generalize. In the studies on tourist activity, we are interested in the entire population. It should be noted that employment of statistical hypothesis is rare. This hypothesis is aimed at verifying whether sample results are probable for the entire population. When analysing questionnaires provided by respondents, we should employ a proper statistical test that would allow to make correct observations concerning the entire population. Usually, statistical descriptive analysis is sufficient. In any case, the advantage of adequate conclusion is significant to undertake the method of statistical hypothesis [Matczak 1982, p. 69].

Tourist activity studies can be carried out on different scales: international [EUROSTAT], national (in individual countries by specially appointed institutions), in specific regions and in individual environments and groups. Usually, they are conducted on representative study samples; there have been cases where absolute studies were conducted.

Before we begin to characterize methods and techniques of tourist activity, we should point out that information on methods of study is published rarely. Usually, study results are published; the used methods are kept a secret (especially in the case of commercial scientific institutions[11]).

Basically, studies concerning tourism movement (including collection of data on the level and structure of tourist activity) are done in two ways. In the first case, we take every unit that comprises a specific statistical set into account. Such studies are called full or comprehensive. As an example, we can mention the census. Comprehensive studies are quite expensive and time consuming, hence, they are rarely performed. These types of studies concerning tourism movement are practically not in usage. Some scientists (who may be wrong) see the hotel and border methods as comprehensive studies.

Recently, due to the deficiency of hotel methodization and liberalization in regulations concerning tourism movement (decline of EU borders), both methods are supplemented with partial studies. Their common usage is derived from confidence that a comprehensive approach of tourism phenomena is not possible. The only method of obtaining wide-ranging information is through systematic, partial studies. The types of studies most frequently used are the following: partial registers, auxiliary statistics, monographic and representative studies. Among the last, we should mention in particular: interviews and polls.

In practical and theoretical studies on tourism movement, the evaluation of this phenomena is simply called the sampling method [Ostrowski 1972, p. 54]. It is among the most frequently used techniques in the analysis of tourist traffic and consumption. Its main quality is that it allows to determine the level and structure of tourist activity in the entire population.

Poll studies pertaining to participation in tourism can be done independently or along with other studies[12]. The basis for analysis of poll studies is provided by a specially selected and representative sample of respondents. The reliability of studies depends on the correct methodology applied.

[11] The author asked several institutions to provide access to information relating to the study methods (including access to questionnaires). He claimed that their use will be strictly scientific, they will not be diffused. Unfortunately, the institutions kindly refused, stating they had to abide by the company's interests.

[12] In Poland, they are often conducted as part of household budget studies.

As mentioned earlier, the noticeable tradition of studies on tourist activity enabled significant improvement of the study procedure. Presently, a large number of methods are used. Each time they are adjusted to the aims and outline of studies, certain conditions, institutions, etc. This situation hinders comparative analysis. This applies to analysis aimed at comparing tourist activity of residents in different countries. In this case, provided were only results gathered by specially appointed institutions in particular countries, scientific institutions and finally, by individual scientists. The wide variety of the used methods and the lack of a universal method that would allow determining tourist activity, creates a situation where comparative analysis is difficult or even impossible to achieve.

Methodological aspects and issues of study comparability are discussed in the latter part of this article. In that part, method analysis and study procedures that were used on studies of tourist activity in several countries worldwide were presented (1984-1986). This time frame was included because during it, studies on tourist activity were conducted in many countries. The studies featured the use of approximate methodology and were performed by authorized institutions. In addition, the World Tourism Organization officially recognized the study results. In the analysis, information published by UNWTO statistical yearbooks was used (Yearbook of Tourism 1988, 46-48). UNWTO collected such data according to the following publications available in individual countries[13]:

- France: *Memento du Tourisme*,Edition 7e Ministre de L'Industrie, Secretariat D'Etat Charge du Tourisme, *Direction de L'Industrie Touristique*, Paris 1987;
- Germany: *Studirentkreis fur Tourismus*, Starnberg 1987;
- United Kingdom (Great Britain): *The British Tourist Market - 1986*, British Tourist Authority, English Tourist Board and Wales Tourist Board, 1987;
- Ireland: *Home Holidays 1986*, Irish Tourist Board, 1987;
- Austria: *Statistische Nachrichten*, 41 Jahrgang (Neue Folge), No 6, 1985;
- Italy: *Survey of Sports and Holidays in 1985. Holiday Patterns of the Italian Population*. Natiziario ISTAT, Serie 4-Foglio 41,Roma 1986;
- Portugal: *Holiday Patterns of the Portuguese in 1986. Review of the Findings*, Secretaria de Estado do Turismo, 1987;
- USA: *US Travel Data Center, Full Year Report National Travel Survey - 1986*, New York 1987.

In the case of Poland, studies conducted by the Central Bureau for Statistics in 1986 were analysed. In order to make a comparison, periodical

[13] Information sent to UNWTO was also used (Finish Tourist Board, Department Recherches de Tourisme in Belgium).

studies done by the Tourist Institute since the beginning of the 1960s were presented. The comparison included the following study aspects: size and assortment method of the study sample, basic terminology, classification of tourist trips and technique of data collection. Qualified institutions were selected to perform studies and analysis. Only these type of studies guarantee that official data in the majority of countries and information published by commercial institutions is not falsified. Data published by institutions such as: professional associations or the Chamber of Commerce is selected in a way that it helps improve the image of a particular institution. It does not mean they are false; they can, nevertheless, depict few chosen aspects of reality [*Marche touristique* 1977, p. 50].

After the initial reconnaissance of the subject (despite WTO efforts to standardize tourist statistics), it became clear that methods utilized in the studies appear to have vast discrepancies. They can already be depicted in the preparation phase, when determining the **means of study sample selection**. This is vital, because proper sample selection has outmost importance in the case of the reliability of obtained results. In the studies on tourist activity, we may apply an adequate or random sample selection. Generally, the random method of selection is used. This method created an opportunity to more accurately reflect the studied population. Reliability and comparability of results is affected by **study technique**. Basically, they are carried out in two ways. Some institutions use mail survey – an interview questionnaire is sent directly to individuals, asking them to respond to questions (PAPI – Paper & Pen Personal Interview). This technique of gathering data (individual responses) is used mainly in academic centres and by scientists doing independent studies. Specialized institutions conducting various types of studies have a qualified staff which personally questions respondents. They mark their responses on prepared questionnaires.

Both methods have certain advantages and drawbacks. The first method gives us more time to fill out the questionnaire, and also time to think over our responses. The second seems more accurate. This is due to the fact that inquirers are present. They can help explain some questions and inaccuracies caused by definition problems. The inquiry method requires training of a certain number of people, which increases costs of the study. The mail method possesses a drawback; always, a certain percentage of people do not fill out polls. This influences the credibility of studies and secondly, creates a necessity to include a greater number of people, hence the preparation of a greater number of questionnaires.

According to J. Lickorish [1972, p. 56], "a qualified inquirer does the interview, the number of people refusing to participate is usually less than 1%". In the guide published by WTO on market studies and tourist consumption, the dependence occurring between the level of study standards and poll staff requirements is highlighted. "The more interviews are standardized, the more we will be inclined to employ intelligent personnel, not necessarily qualified (students, young housewives). The more interviews are variable, enhanced, partially standardized, the more qualified personnel will be needed (psychologists, marketing experts). It should be noted that employing an average personnel could be dangerous, especially when such personnel is paid according to the number of interviews given" [*Marche touristique* 1977, p. 35-36].

Other study techniques have been tried. For example, in the US in 1986, detailed interviews concerning the level and structure of tourist activity were conducted over the phone (CATI – Computer-Assisted Telephone Interviewing). Despite the fact that such studies were conducted on a small sample (1,500 people), very encouraging results were obtained. The main advantage of this method is being able to contact every single person earlier qualified to the study.

A special study technique is the so-called consumer panel. The term panel is derived from law terminology; originally, it referred to the number of deputies who were to participate in parliamentary commissions [Studzinska 1970]. Presently, the term panel is referred to a group of experts in a certain field, who debate on a specific subject. In market studies, panel comprises of a consumer group. This group is selected in such a way that it becomes a representative sample on the market. It is studied and used in multiple comparisons aimed at determining developmental trends. The description is not synonymous. It is also used in relation to the permanent, general population, selected for comparative studies on the similar issue.

We can distinguish three types of consumer panels. Based on the outline of studies we can differentiate universal and specialized panels. Based on the means of registering data, we have correspondence (mail) panels and direct panels (through interviews). Consumer panel studies have many assets and drawbacks. The advantages include: analysis comparability, dynamic character of gathered information, precision and uniformity. The disadvantages include: necessity to maintain a rigid sample during the time of the study, preventing the panel dissolution, being able to quickly process data, relatively high study costs and influence of studies in the mind of respondents (Bosiacki 1990, 205-206).

By analysing the usefulness of various methods and techniques of tourist activity, J. Jeffries (1980) discovered that the best results are attained through direct conversation by qualified inquirers. They used permanent, well-elaborated questionnaires. He also noticed that due to the tourism dynamics and rapidly changing needs as well as tourist preferences, studies on tourist activity become invalid. His opinion is similar to the views of L. Lickorish and A. Kershaw [1958, p. 125]; they claim that best results are obtained through systematic study of the same group of respondents. A similar standpoint is regarded by G. Meanges [1955, p. 35].

Reliability and representation of studies are determined considerably by the **population size and sample amount used in studies**. S. Bosiacki estimates that in order to obtain highly credible results pertaining to tourist consumption in Poland, over 10 million households should be examined. He claims that such studies are inconceivable to carry out by any research centre (unless they would be part of a census). He claims, however, that approximate results should be generated by a properly selected representative sample, consisting of 4,000 to 5,000 households [Bosiacki 1987]. To verify this thesis, he presents his own, perennial studies (the so-called Poznań studies).

G. Lambeau writes curiously about the significance of population size and the resulting possibility to conduct analysis of level and tourist activity structure, including many variables. He points out that in order to discover tourist behaviour among people aged 30 to 40, living in medium size cities, with an income between 60 to 100 thousand francs (in case we would like to obtain an essential minimum in each group, approximately 100 responses), we would have to examine an extraordinarily large sample [Labeau 1968, p. 53-54]. The size of the sample is associated with the number of independent variables considered. The mentioned dependencies are determined by the following exponential equation:

$$\mathbf{P = 100 \times S^n}$$

where:
P – sample size;
S – number of intervals occurring per one independent variable;
n – number of variables simultaneously taken into account for the selected approach.

Let us assume that we want to discover the level and structure of tourist activity divided into three variables (income, age and social group affiliation), establishing five intervals for each one. To carry out such an analysis, a complex sample described by $P= 100x\ 5^3$ or, in other words, 12,500 respondents would be required. If we want additional information on the influence of urbanization level we would require a complex sample defined by $P= 100x\ 5^4$ or 62,500 respondents.

It is highly uncommon that tourist activity studies are carried out on such large samples. Studies are mainly used for immediate tourist practice. Companies that commission these studies do not require very detailed analysis. Examining the versatile dependencies is also not necessary. In the analysed studies, divergence in the outline of sample sizes was quite significant. The largest samples were used in Austria (68,000 people) and Italy (24,518 people). In most countries, samples were considerably lower and counted several thousand people. The American studies used a relatively small sample; merely 1,500 respondents participated in the poll. It should be emphasized that in individual countries, various sample sizes were employed. For example, in Poland, the Central Bureau for Statistics conducted studies on tourist activity on the following samples: 5,500 (1969), 10,000 (1973), 24,500 (1986) and even a sample of nearly 70,000 respondents[14]. In the past few years, the Tourism Institute provides basic data pertaining to tourist activity among Poles. They are carried out on three level representative scales, comprising of 1,500 people.

Aside from the sample size, significant divergence pertains also to the **means of classifying people included in the studies**. Mainly adults (over the age of 18) are inquired. This criterion was used in studies carried out in Great Britain, the USA and France. Certain countries lower the age limit in their study. In Ireland, persons over the age of 16 are inquired, in Portugal and Poland, persons 15 years and older. The lowest age range was noted in Italy and Germany, where all persons 14 years and older were included in the study. In some countries, only people within specific age ranges are included (Finland surveys people between the age of 15 and 74[15]).

Means of travel classification and definition of tourist trips considerably affect the incapability to compare study results. Divergence in this matter pertains both to character and duration of trips. Usually, every journey classified as a tourist trip is divided into long- and short-term. The assumed criteria are defined as the number of accommodations outside the permanent place of residence. In most countries, short-term trips have an established upper limit of 3 accommodations[16]. On the other hand, German studies determine long-term trips as lasting a minimum of 5 days. In Austria, the duration of long-term trips was enclosed in the 4 to 7 week range. A quite different situation occurred in Poland, where a specific typology was devised. It included: one-day trips, weekend trips (2-3 days), excursions (4-6 days), long-term trips (over 7 days) and foreign trips (time duration not included).

Goal and trip character are also classified in various ways. This especially pertains to aims and travel motives, according to which they are classified as either tourist or other. Many countries do not require special restrictions. The only established criterion is the duration of trips (in Aus-

[14] In the last case, studies pertained only to participation in several forms of tourism, designated by the Council of Family Affairs.

[15] It is difficult to assess whether criteria based on age groups are employed in some exotic countries. We have no information whether there are studies on tourist activity. Some information provided by tourist departments in these countries is appalling. Among the 44 studied countries, over 20 utilized various classification systems. In Malaysia and Morocco, 4 age ranges were used. Meanwhile, in Gambia, Haiti and Japan, the 12-15 age group was employed.

[16] Only in GB, did short-term trips include all trips which require no more than 1 accommodation.

tria and Finland). Other countries exclude certain motives or determine admissible trip standards. The first solution is visible in Germany, where trips should be non-profit in nature (excluding business). The second solution was assumed in Belgium (the purpose of tourist trips must be unofficial, for example, recreation, health, family) in France (health, sport, congress, weekend leisure[17]) ,and in Great Britain (exclusively for leisure). In Poland, the following types of trips were considered: non-profit, non-emigration and mainly leisure[18].

Study area and time period are also important. Studies are usually conducted directly after the tourist season, when there is a great chance to obtain valid and comprehensive information regarding the size and character of tourist consumption. During that time, studies are conducted mainly for the purpose of national tourism policy. Recently, studies are starting to be conducted before the tourist season. Their purpose is to obtain the most updated forecasts on the size and character of tourist demand (preferences, direction of trips, planned expenses, etc.). These studies are frequently undertaken (independently or by the order of specialized institutions) by tourist companies. Certain disaccord relates to the study period. For example, in France only trips taking place between 1 October and 30 September are considered. Additionally, the whole year is divided into two seasons: the summer season (1 May to 30 Sep.) and the winter season (1 Oct. to 30 Apr.) [Memento 1990].

It is evident that the most crucial fault in studies on tourist activity is the **diversified terminology**. In particular, we should mention the difference between scientific and ordinary language. Various definitions and their interpretations result in interchangeable or contradictory usage of many tourist definitions. Discrepancies caused by the introduction of various tourist terms occur in the initial phase of studies, and later in the phase of analysing the obtained results. To substantially eliminate interpretation differences, proper studies are precluded with a short pilotage. It is aimed at verifying content and questionnaire structure. The questionnaire is devised in such a way that all questions are understandable. Interview questionnaires render the comparability of studies. Their content is usually unavailable. This again, this creates difficulties in conducting a comparative analysis[19]. The greatest disproportions pertain to structure of tourist activity according to forms of tourism movement. It is common that the people

[17] At the end of the 1990s, France defined the domestic long-term trip. It is regarded as every trip (requiring 4 or more accommodations) which cannot be undertaken for the following purposes: study, health, due to illness or death of a family member.

[18] In 1992, studies conducted by the Tourism Institute also included business trips into domestic trips.

[19] The institutions which were asked to provide access to questionnaire samples, refused. They argued that questionnaires are a basic working tool and source of income.

inquired have trouble qualifying their tourist trip[20]. By not being able to recognize the definition and different forms of tourism presented in the poll, respondents usually underline several options. This certainly influences the study results.

In this chapter, we concentrated on the reasons for not being able to compare study results on tourist activity. We described the most significant reasons. The issue of estimation and determination of tourist activity also causes some discrepancies. This problem is discussed in the following chapter.

Methods of estimating and expressing (indexing) the level of tourist activity

In the scientific literature, we can encounter a few manners of result presentation and determination of level of tourist activity. As described earlier, the most common measure used in tourism studies is the so-called **tourist activity rate**. This term was introduced by G. Labeau, who described it as the percentage of people participating in tourism relative to the general population. According to G. Labeau [1968, p. 43-56], tourist activity rate is a measure of tourist progress as well as a very good index for describing standard of living. This index has basically two separate meanings. The first one, according to Labeau's proposition, describes the percentage of people touristically active relative to the entire population. In this sense, it is possible to determine tourist activity rate, based exclusively on representative poll studies. This was already discussed in the paper.

A similar method used to calculate tourist activity rate is presented by M. Troisi. If we designate **Ta** as the number of people who, at a specific time, depart from location A, and **Pa** means the number of people residing at location A, the resulting ratio **Ta/Pa** is referred to as the **tourist mobility index**. This is a general index, since it refers to the entire population. If we consider the **Ta/A** ratio, we receive a specific index reflecting the habits of the social environment [Troisi 1963, p, 28-29]. We should add that residents living in location A must be aged 15 to 65 (professionally active). Such a group of people is bound to travel a lot and possesses adequate purchasing power.

In some publications, tourist activity rate expresses a different meaning. For example, by dividing the number of tourist trips by number of people. In his paper, Kornak writes that in 1975, 3.6 million foreign trips were noted in Poland. The tourist activity rate (international) reached a value of 13.9% [Kornak 1979, p. 35]. It seems in this case, the use of tourist activity

[20] For example, how would you qualify a two day yachting trip? As weekend leisure, a form of qualified tourism or simply an excursion?

rate is improper. The obtained value states that in 1975, each Polish resident (on average) participated in 13.9% of trips. Due to some imperfections regarding the border and hotel methods, this index is not precise.

The tourist activity rate fully expresses the percentage of people departing for tourist purposes. We cannot determine many significant features of actual and potential demand in respect to tourism. This, in particular, concerns information on forms of tourism movement, travel frequency, the size of expenses, etc. The need to possess highly widespread and detailed information on tourist activity results in the fact that the usage of tourist activity rate is unsatisfactory. For some time, scientists have been discovering new ways of expressing this index. H. Schmidhauser [1975, p. 53-66] designed a very interesting method. He proposed to calculate three separate indices, as shown below[21]:

- **Net travel propensity,** which is similar to the term used by G. Labeau;
- **Gross travel propensity**, which can be expressed as the average travel frequency in a given population;
- **Travel frequency**, a sort of integrated index being the outcome of the previous two.

In order to precisely explain the elaboration of all indices, let us use an example [Boniface, Cooper 1988]. Let us assume that in a population of 10 million people, the following number of people participated in tourist trips:

3.0 million people – 1 time = 3.0 million x 1 = 3.0 million trips
1.5 million people – 2 times = 1.5 million x 2 = 3.0 million trips
0.4 million people – 3 times = 0.4 million x 3 - 1.2 million trips
0.2 million people – 4 times = 0.2 million x 4 = 0.8 million trips
Total: 5.1 million people – minimum 1 time = 8.0 million trips

Source: Boniface G.B., Cooper P., The Geography of Travel and Tourism, Heinemann Professional Publishing Ltd, Halley Court, Jordan Hill, Oxford OX28EJ, 1988, Appendix Nr 3. Calculation of Travel Propensity and Travel Frequency, p. 204 - 205.

Means of calculating Net Travel Propensity:

$$NTP = \frac{NP}{TP} \text{ x } 100\% = \frac{5.1 \text{ mln}}{10.0 \text{ mln}} \text{ x } 100\% = 51\%$$

where:

- NTP – Net Travel Propensity;
- NT – the number of people taking at least one trip;
- TP – the population size.

[21] Terminology proposed by the author is given in parentheses.

In the described example, the index of tourist participants for the whole population is 51%. This means that one out of two people travelled for tourist purposes at least once.

Means of calculating Gross Travel Propensity:

$$GTP = \frac{NT}{TP} \text{ x } 100\% = \frac{8.0 \text{ mln}}{10.0 \text{ mln}} \text{ x } 100\% = 80\%$$

where:

- GTP – Gross Travel Propensity;
- NT – Net Travel Propensity;
- TP – the population size.

The obtained results show that on average, per one person (it is not important how many times this person has travelled), 0.8 trips occur.

Means of calculating Travel Frequency:

$$TF = \frac{GTP}{NTP} = \frac{80\%}{51\%} = 1.57$$

where:

- TF – Travel Frequency;
- GTP – Gross Travel Propensity;
- NTP – Net Travel Propensity

The last index (previous indices are employed) allows us to weigh the results of analysis. This value does not directly refer to either a portion of the studied population or to the general population[22]. The indices and calculation methods proposed by H. Schmidhauser are noticeably more detailed than the tourist activity rate used by G. Labeau. One of the advantages of this method is its consideration of travel frequency and usage of an integrated index that enables averaging the results. Another interesting method of determining the level of tourist activity is the so-called **Hurdman Index** [Hurdman 1979, p. 43-49]. The main factor is the number of tourist trips per one person. The elaborated method compares calculated quotients respectively. First, we divide the number of tourist trips registered in a country by the general number of trips worldwide. Secondly, we divide the number of residents in a certain country by the number of people worldwide. In

[22] The obtained index was the result of dividing trip frequency related to the entire population by the percentage of people who participated in tourist trips.

the first instance, we obtain a share of tourist trips in one country relative to a worldwide tourism movement. In the second instance, the share of population in one country to the global population. By dividing the two values, we receive Hurdman's index.

Means of calculating Hurdman's index (CPGI):

$$CPGI = \frac{\frac{Ne}{Nw}}{\frac{Pe}{Pw}}$$

where:
- CPGI – Country Potential Generation Index;
- N e – the number of tourist trips generated by country;
- N w – the number of trips generated worldwide;
- P e – the country population;
- P w – the global population.

Hurdman's index is mainly used when making international comparisons. It allows us to estimate the percentage of a population in one country with regard to world tourism movement. If the result value is equal to 1, this means that the number of trips generated by one country is proportional to the share of the world population. If the value falls below 1, this means the country's capability to generate trips is higher than average.

S. Ostrowski, back in the 1970s, attempted to compare the tourist activity of residents in various European countries. He concluded that there is lack of information on this subject and that the existing data is simply incomparable. He tried to devise an index that would partially compensate diversity and deficiency of data. He constructed the so-called **tourist activity coefficient**. He calculated this coefficient separately for domestic and international trips.

The tourist activity coefficient presents the ratio of the number of people using any type of accommodation base relative to the general population of a country. Poland placed tenth in the classification comprising of 15 countries (44.8%, 34.4 million people, 15.4 million domestic trips). The highest index was attained in Switzerland (103.1%, 6.4 million people, 6.6 million trips) and the lowest in the Soviet Union (12.5%, 256.7 million people, 32 million trips) [Ostrowski 1979, p. 122].

In the quoted studies, the numbers of foreign travel, registered in the official statistics, expressed the measure of activity in international trips.

The analysis was limited to socialist countries[23]. For that reason, calculation of a combined coefficient was only possible for chosen countries[24]. Two additional comparative indices were calculated; they pertained only to leisure trips (vacation). The first index described the number of people utilizing one accommodation place per annum[25]. The second described number of people participating in leisure trips (per 1,000 persons[26]).

In one of his early papers, S. Ostrowski suggested yet another way to determine tourist activity. His method was based on devising **four variant indices of tourist activity**. This method was very similar to the one just described. The four variants are as follows:

- Option 1 – participation in domestic accommodation tourism was included as well as foreign trips (in 1972, a value equal to 49% was obtained);
- Option 2 – only holiday trips were included (28.2%). Socialized market institutions serving in tourism organized them;
- Option 3 – in foreign trips, children below the age of 15 were excluded. The number of domestic trips was decreased by the assessed share of children and youth (31.8%),
- Option 4 – unorganized trips were included. They were decreased by the estimated number of children and youth that participated (53.1%).

Subsequently, all indices were totalled and divided by four. That way, a synthetic index was obtained. It was presented in the form of an arithmetic average calculated from all four indices (a value equal to 40.5% was obtained) [Ostrowski 1974, p. 107-109].

J. Passini proposed a quite original method of studying and determining tourist activity. According to his project, each tourist would be equipped with a special questionnaire called **Inter Cards**. All tourists should carry them during tourist trips (especially foreign travel) [Ostrowski 1975]. Another interesting method is the so called **aggregate leisure index** devised by A. Pawelczynska [1971]. The author elaborated this index for the purpose of holiday leisure. The method, however, is so simple that it can easily be used to determine tourist activity in other forms of tourism. Additionally, it can be used to describe the level of tourist activity. The index is main-

[23] This was caused by an alleged absence of data pertaining to foreign trips in western countries. In reality, such data was more comprehensive than in socialist countries. Most foreign trips were noted in East Germany (12.5 million). In Poland, foreign departures constituted over 120 million people [Ostrowski 1972, p. 129].

[24] The highest integrated coefficient of tourist activity was observed in Czechoslovakia (114.1%), East Germany (95.8%) and Poland (80.8%), and lowest, in the Soviet Union (13.5%) [Ostrowski 1972, p. 129].

[25] Poland was placed last with an index equal to 8.1. The highest index belonged to Czechoslovakia (38.9).

[26] Poland ranked among the top countries, which were members of the Council for Mutual Economic Aid (in Polish: RWPG).

ly used for a short period of time. This method enables comparisons in any designated group. Each leisure trip (based on duration) is assigned a specific number of points. According to the above, a 2-week trip receives - 3 points, a several-days-long trip - 2 points, a one-day trip- 1 point, and the absence of travelling – 0 points. Next, adequate point ranges are established. Based on distribution of data into proper intervals (according to the number of points), the level of tourist activity is determined. For a 5-year period, the following ranges were devised[27]:

- 0 points – lack of activity;
- 1-3 points – weak activity;
- 4-6 points – average activity;
- 7-10 points – high activity;
- >15 points – very high activity.

An original measure of tourist activity was employed in the studies by S. Bosiacki, M. Mocek and Z. Zupanska [Bosiacki et al. 1995]. In 1993, they conducted representative poll studies for the purpose of determining the level and structure of tourism share of Polish residents. The tourist activity was averaged on a household level. The basic measure of tourist participation was the so-called **index of household tourist activity**. It showed the percentage of households in which at least one person departed for a holiday [Bosiacki et al. 1995]. J. Raciborski [1988] also used a method of averaging tourist activity, however, his measure of tourist participation was different. Similarly as others in recent studies, he assumed that family presents a certain entirety in which numerous factors influence one another, shaping the situation of individual people. Raciborski devised an index called **family tourist activity balance**. The author studies the influence of household size on the size and character of tourism consumption. He depicted tourist activity as the number of days occurring per one family member participating in travel and leisure. This method also makes it possible to compare level of tourist activity both on a macro scale and in smaller groups.

In a similar way, Z. Kruczek [1974] determined the tourist activity of Polish students. In his studies, he used the term **tourist activity index**. This index, however, had a different meaning. It related to the average number of days spent on various tourist events by a statistical student. The value of the index was expressed as a ratio of tourism movement size (in person days) to the number of students. As opposed to other methods, this particular one did not require poll studies. The necessary data (concerning the number of participants in events organized by various academic organizations) was obtained from academic branches, the Polish Tourist Country Association and student academic councils. The index of tourist activity was

[27] In relation to shorter periods (one year, for example) we should utilize respectively lower point intervals.

calculated by dividing the amount of person days by the number of students. This enabled calculation of an aggregate index (national scale) as well as indices pertaining to individual academic centres.

A group of scientists in the 1970s studied tourist behaviours of the Polish youth. They attempted to devise a **grade of tourist trip behaviour and tourist experience index [**Dziewulak et al. 1977]. Based on the analysis of trips taken in the past five years, six basic types of practiced tourism were designated. The first type consists of people passive in terms of tourism; they never participated in a tourist expedition (12.5%). The seconds consists exclusively of tourists travelling by bus (14.5%), meanwhile, the third type consists of mobile tourists who participated in bus tours, car trips and even motorcycle trips. The last three types pertain to people who participated in the described forms of tourism; in addition, they participated in events organized by qualified tourism. The fourth type relates to tourist-hikers (23%). They participated in some sort of hiking trip (lowland, mountain, hitch hike) but did not participate in expeditions requiring the use of sporting equipment. The fifth type describes tourists participating in water-related activities (canoe, sailboat). The sixth type refers to a versatile tourist who possessed various experience in different forms of tourism [Dziewulak et al. 1977, p. 263-264].

According to the authors, affiliation to a specific type of tourism yields a general index of vastly understood tourist activity [Dziewulak et al. 1977, p. 268]. In their opinion, the presented typology features a scale of activity and tourist experiences in which the most valuable were that belonging to qualified tourism. The studies have shown that by practicing at least one form of tourism, people can be recognized as tourists. There is a very high, positive correlation between affiliation to a specific type of tourism and three detailed factors (Fig. 1)

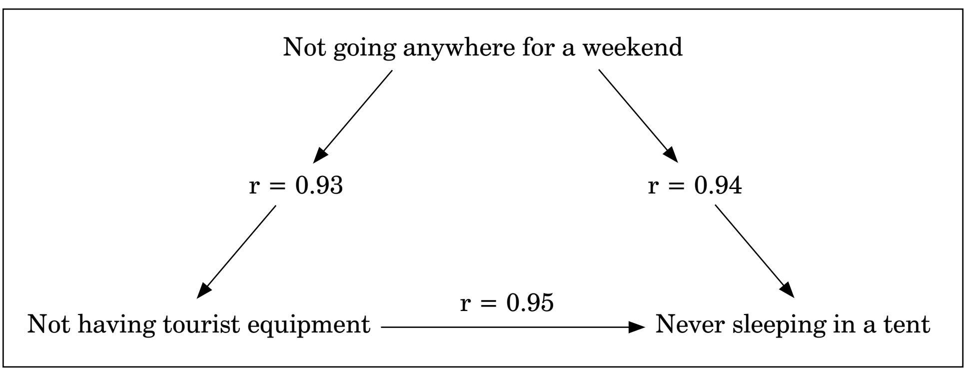

Fig. 1. Correlation between the affiliation to a specific type of tourism and three factors: campfire experience, frequency of weekend trips and possession of tourist equipment.

Source: [Dziewulak, Kosel, Nocuń, Przecławski, Zürn, 1977, p. 262].

The scientific literature presents several methods of determining tourist activity. They are usually presented in the form of statistical estimates. Various sources of information and databases are used (both original and secondary materials). Among the many additional measures of tourist activity, we present a few of them:

- Variety and character of practiced tourism;
- Frequency and duration of trips;
- Tourist expenses;
- Membership and activity in tourist organizations;
- Number of tourist awards and authorizations gained;
- Possessing tourist equipment.

The highlighted measures may be employed to determine tourist activity of individual people or entire populations. In the latter case, indices related to the number of people using accommodation bases are often employed. These indices also characterize the number of accommodation per person (quotient of the number of users and given accommodations). The presented measures of tourist activity are expressed either in absolute values or in percentages of any population. Every method of determination of tourist activity, presented so far, has its own pros and cons. We cannot find a single method that would precisely describe both the level and structure of tourist activity and, at the same time, yield a certain aggregation of study results.

Being aware of that situation, the author of this paper (during studies carried out in Sweden in 1989) employed yet another method of tourist activity [Alejziak 1991, p. 3-21]. These studies have taken into account: amount and structure of free time, structure of tourist motivation, furnishing households with sporting equipment and opinions regarding the significance of tourism and tourism expenses in the studied households. In relation to tourist activity itself, other elements were considered: participation structure (according to form of tourism movement), frequency of trips and participation in foreign trips. In all cases, analysis pertained separately to the year 1989 and the previous four years.

Firstly, **indices of level and participation for each of the 12 forms of tourism mentioned in the questionnaire** were calculated. This index was expressed as the percentage of people participating in each form of tourism. It could be compared with the term of tourist activity rate previously used by G. Labeau. Subsequently, an **integrated index of participation in every from of tourism** was calculated.

The percentage of people that participated in individual forms of tourism was totalled, the obtained value was dived by 12 (number of forms of tourism). In the next phase, using the information on the number of trips, the **index of participation frequency in individual tourism types (Wc)** was calculated.

$$Wc = \frac{\sum_{i=1}^{n} w_i \text{ x } n_i}{\sum n_i} \text{ x } 100\%$$

where:

- n_i – the number of people;
- w_i – the number of trips,
- Wc – 100% = 1 trip.

Based on the formula presented above, the weighed arithmetic average was obtained. This equation expresses the average number of trips occurring per one person in relation to each tourism form. The average was described as index of participation frequency in the given form of tourism for an average respondent. Next (by totalling values of all unit indices and dividing them by a combined amount equal to 12), **an integrated index of trip frequency** was devised. This index expresses the average number of tourist trips occurring per an average respondent.

Conclusions

1. **In reference to the chapter, which pertains to the study methods on tourist activity:** So far, versatile (methodologically correct) methods on tourist activity have not yet been created. The majority of research comprises of surveys. Problems dealt with in study are the following: diversified methodology, peculiar fragmentation of analysed issues and limited means of study comparability conducted at various research centres. This results in the rather limited practical usefulness of such studies; it clearly raises some doubts. An important issue that deserves attention is the reasons for not participating in tourism. Recent studies also depicted total absence of regional approaches. This might be due to the fact that studies are conducted on small domestic samples, which hinder capturing regional diversity in terms of size and character of participation.

2. **In reference to the chapter which pertains to ways of determining level of tourist activity:** migrations (not for the purpose of making money) have become quite commonly diversified as far as their form. Because of that, traditional indices reflecting the level of participation in tourism (for example, the tourist activity rate) are not useful, making it difficult to analyse these phenomena. In light of this, we

should strive to devise new methods of determining tourist activity. In the presented article, new methods of estimating tourist activity were devised. In addition, specific indices of tourist activity, incorporating presented conditions, were elaborated.

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BADANIA NAD AKTYWNOŚCIĄ TURYSTYCZNĄ W EUROPIE – ASPEKTY METODOLOGICZNE I WYNIKI (CZĘŚĆ I – OKRES 1945-2000)

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Abstrakt

Cel. Analiza badań nad aktywnością turystyczną, które prowadzone były w różnych krajach europejskich w okresie od zakończenia drugiej wojny światowej do końca XX wieku. Objęto nią zarówno metody i techniki badawcze, jak i sposoby określania (wyrażania) aktywności turystycznej, starając się w każdym przypadku odnosić je do kwestii możliwości porównań wyników różnych badań (zarówno w skali krajowej, jak i międzynarodowej).
Metoda. Podstawową metodą zastosowaną w pracy jest rozbudowana analiza piśmiennictwa naukowego dotyczącego badań nad aktywnością turystyczną (analizom poddano prace publikowane w języku polskim, angielskim, niemieckim i francuskim), w której uwaga skoncentrowana była na metodologii badań. W pewnym zakresie analizom poddano jednak również uzyskiwane wyniki badań, które – pomimo ograniczeń w zakresie ich porównywalności – ukazały duże zróżnicowania poziomu aktywności turystycznej pomiędzy mieszkańcami poszczególnych krajów.
Wyniki. Przeprowadzone analizy wykazały, że większość badań prowadzonych w całym analizowanym okresie stanowiły badania sondażowe, które cechowały się wielką różnorodnością metod i technik badawczych, niejednolitą terminologią oraz różnymi kryteriami i typologami różnych przejawów aktywności turystycznej. Badania ujawniły także stosowanie różnych wskaźników (mierników) aktywności turystycznej, co dodatkowo utrudniało diagnozy zjawiska oraz interpretację wyników, mając tym samym niekorzystne skutki dla wykorzystania wyników badań w praktycznej działalności.
Ograniczenia badań i wnioskowania. W artykule zaprezentowano analizy badań prowadzonych do roku 2000. W przygotowaniu jest opracowanie, które podejmować będzie tę samą problematykę w oparciu o analizy badań oraz będących ich efektem publikacji, które ukazały się już XXI wieku.
Implikacje praktyczne. Badania wykazał, że pod koniec analizowanego okresu, tradycyjne metody badania oraz mierniki poziomu uczestnictwa w turystyce (np. stopa aktywności turystycznej), często nie pozwalały już rzetelne analizy rynkowe i wymagały doskonalenia (zwłaszcza jeśli chodzi o kwestię porównywalności badań i wyników prowadzonych przez różne instytucje), czego domagała się branża turystyczna, dla której badania takie stanowią ważny czynnik decydującynie tylko o bieżącej działalności, ale są także ważnym elementem planowania strategicznego.
Oryginalność. Artykuł prezentuje jeden z najpełniejszych przeglądów badań nad aktywnością turystyczną, zwłaszcza jeśli chodzi o analizy metodologii badań nad tym zjawiskiem. W pracy zaproponowano także nowe sposoby szacowania oraz wskaźniki aktywności turystycznej, uwzględniające wspomniane wyżej uwarunkowania.
Typ artykułu. Artykuł o charakterze przeglądowym, analizujący wyniki wielu badań empirycznych.

Słowa kluczowe: aktywność turystyczna, metodologia, terminologia, sondaże, dobór próby, kryteria klasyfikacji, porównywalność badań.

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DETERMINANTS OF SENIOR TOURIST ACTIVITY IN LIGHT OF CONTEMPORARY RESEARCH

*Zbigniew Głąbiński**

Abstract

Purpose. The aim is to identify the main determinants of tourist activity among seniors in different countries, on the basis of literature.
Method. Study of literature.
Findings. Literature analysis has demonstrated that some of the most important factors affecting tourist activity of seniors comprise: age, medical condition, gender, nationality, income level, travel company, education, travel companion and a place of residence.
Research limitations and conclusions. The discussion has been based on a selection of literary works available in contemporary Polish and international literature. It should be noted that most of the presented results concern the studies of both one-off and short-term character that relates to specific social and geographical contexts. Accordingly, the presented conclusions are subject to a certain degree of subjectivity resulting from the selection of sources.
Practical implications. Recently, there has been a significant increase in interest regarding the issue of senior tourist activity in Poland, especially among representatives of various scientific disciplines. However, the issue of the significance of the elderly to the tourism economy as well as the availability of offers for seniors still requires awareness-raising activities among practitioners. For this reason, the presented overview of conditions concerning the tourism of seniors may contribute to increasing interest in this problem among tourist business representatives and people responsible for tourism policy.
Originality. The article presents a condensed overview of selected factors influencing tourist activity among seniors in different countries.
Type of paper. Review article.
Keywords: senior tourism, tourist activity, travel motives.

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Introduction

The issues related to senior tourism are increasingly reflected in both contemporary Polish literature [Bąk 2013; Głąbiński 2014; 2015; 2016; Górna 2015; Graja-Zwolińska S., Spychała A., 2012, Kociszewski 2012; Kowalczyk-Anioł 2011; 2013; Śniadek 2007; Śniadek, Zajadacz 2010] as well as the foreign [Alen, Dominguez, Losada 2012; Balderas-Cejudo, Rivera-Hernaez, Patterson 2016; Kazeminia, Del Chiappa, Jafari 2013; Le Serre, Legoherel, Weber 2013; Littrell, Paige, Song 2004; Möller, Weiemair, Wintersberger 2007; Nimrod, Rotem 2010; Patuelli, Nijkamp 2015; Prayag 2012].

The causes for researchers' interest in these issues are well known and linked to the process of population ageing in most world societies. As the United Nations indicate [World Population Ageing 2013 p. XII], the share of people aged over 60 increased from 9.2% in 1990, to 11.7% in 2013 (841 million) and will reach 21.1% (over 2 billion people) on a global scale. The process of ageing particularly affects the most developed countries, including those of the European Union. As the report by the European Commission entitled "Europe, the best destination for seniors" [2014] points out, the number of people over 55 years old exceeds 128 million in the EU and represents 25% of the its total population.

An unprecedented increase in the number of elderly people in society is becoming more and more noticed in many areas of socio-economic life. As Dragan states [2001 p. 6], one of the main problems experienced by elderly people is the excess of free time and the problem of its management. On the one hand, free time is perceived as an advantage or even a reward and, on the other hand, there is a need to fill it with an activity replacing one's previous social roles (work, family responsibilities). As a result, many retirees take up and develop different forms of activity that are not related to their current responsibilities. I. Patterson and S. Pegg [2009 p. 259] emphasise that, nowadays, retirement is more and more seen as the time when a senior begins to experience feelings of freedom, including taking risks or trying something that cannot be done while doing work and family responsibilities. Therefore, the level of social activity of seniors is, among others, considered as a basic indicator of their quality of life [Niewiedział 2008 p. 98].

While considering the issue of leisure time in the context of seniors' participation in tourism, E. Dziedzic and T. Skalska [2012 p. 48] state that the process of population ageing leads to the phenomenon of "generation shock", whose influence on the tourist service market is difficult to predict. The authors point to the US market as an example, which witnessed the phenomenon of doubling the expenditure of seniors on tourism in the first decade of the 21st century. Similarly, the fact that tourism constitutes the main priority for life, placed higher than housing and clothing, for French seniors, may yet be another argument that confirms this view [Le Serre, Chevalier 2012 p. 262].

In this situation, the issue of understanding the needs, motives and tourist behaviours of the elderly has become of fundamental importance not only in theory but also practice. It was not so long ago when the elderly were not yet seen as a promising market segment [Carrigan, Szmigin 2000; Dann 2001; Moscardo 2005]. The situation has been slowly changing, but over the years, the tourism industry is still not well aware of the mature market needs and often considers it as a homogeneous segment in terms of demography, lifestyle, health, psycho- and social behavioural patterns [Balderas-Cejudo, Rivera-Hernaez, Patterson 2016; Gonzales, Rodriguez, Miranda, Cervantes 2008; Lehto, O'leary, Lee 2002; Nimrod 2008].

The issue of tourist activity is extensively discussed by W. Alejziak [2012]. In his work, the author distinguishes broad and narrow understandings of this concept. His considerations include a narrow definition stating that tourism is about people who participate or participated in tourism.

This issue, when seen with reference to seniors, has been raised by researchers from different countries for many years. The studies are conducted at permanent residences [Gonzales, Rodriguez, Miranda, Cervantes 2008; Le Serre, Chevalier 2012; Le Serre, Legoherel, Weber 2013; Littrell, Paige, Song 2004; Nimrod 2008], while travelling to a destination or returning home [Batra 2009, Cai, Schwartz, Cohen 2001], or while staying at tourist destinations [Głąbiński 2016; Jonsson, Devonish 2008; Prayag 2012].

What should be noted is that a variety of research approaches are presented, both the empirical ones quantitative in nature [Bąk 2013; Chen, Shoemaker 2014; Shoemaker 2000; Lehto, O'leary, Lee 2002], and those which are qualitative [Głąbiński 2014; Kazeminia, Del Chiappa, Jafari 2013; Sedgley, Pritchard, Morgan 2006], as well as theoretical considerations based on the analysis of subject-related literature [Alen, Dominguez, Losada 2012; Balderas-Cejudo, Rivera-Hernaez, Patterson 2016; Głąbiński 2015; Moscardo 2005; Patterson, Pegg 2009; Patuelli, Nijkamp 2015].

Regardless of the applied research approach, it is the factors influencing tourist activity of seniors that constitute one of the most frequently discussed issues. According to W. Alejziak [2012 pp. 144-152], there are various types of factor classifications in this respect. Some of the mentioned ones are, among others: internal and external determinants, also referred to as psycho-sociological and socio-economic. The first ones involve needs, motives, attitudes, preferences while the second ones mention the factors related to the degree of affluence, the level of income and prices.

Kaczor and Zamelska [2000] formulated a typology for the existence of extraneous attracting and inhibiting forces. Additionally, the World Tourism Organization proposes a trichotomic division and lists socio-economic, psycho-socio-cultural and technical factors. W. Alejziak [2012, p. 151] reaches an interesting conclusion, seen in the context of various classifications, as he notes that some of the factors may have different effects on tourist activity in different situations. Therefore, the author proposes a functional typology of tourist activity conditions and distinguishes: generators, activators and modifiers (Fig. 1).

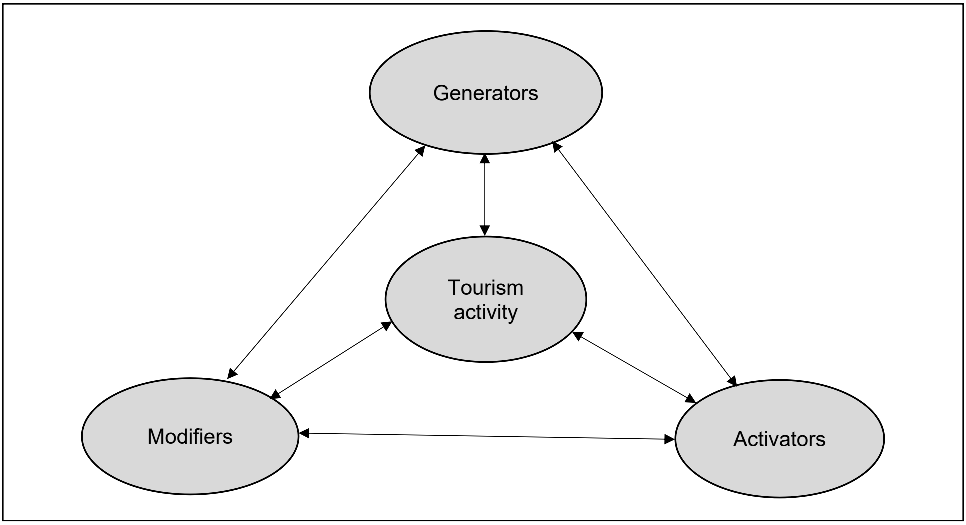

Fig. 1. Functional typology of tourist activity
Source: [Alejziak 2012, p. 150].

The needs and motives of tourism are mentioned among the most important generators, while leisure time, income, size and variety of tourist offer, quality, prices are referred to as the most significant activators. The modifiers most frequently constitute socio-cultural factors: belonging to a particular social class, lifestyle, influence of opinion leaders. In Alejziak's view, all the factors influencing tourist activity are in a mutual relationship, which makes it possible for certain conditions to change roles in certain situations. In the case of seniors, who are a very diverse group in terms of many socio-demographic, economic and social features, the effects of those stimuli are uneven and vary over time [Nielsen 2013, p. 115]. Such opinions indicate that the issue of tourist activity remains far from being fully explained and further research is required in this area.

The theory of pull and push factors [Kozak 2002; Lee 2009] is one of the most popular concepts of tourism development in world literature. The push factors make a tourist leave his or her place of residence and search for an unspecified direction of travel, while the pull factors urge a tourist to choose a particular place that is seen as attractive due to its values. The push factors are related to the individual characteristics of a tourist's personality (needs, motives, drives, tendencies) and the pull factors concern the characteristics of the target destination (tourist values, tourist facilities development, accessibility, security, advertising, level of service) [Alejziak 2012; Jang, Wu 2006; Kozak 2002]. The set of push and pull factors is individually determined for an individual tourist profile.

The foregoing concept is broadly applied in the research on seniors' tourist activity [Boksberger, Lasser 2008; Dann 2001, Jang, Wu 2006; Jonsson, Devonish 2008; Le Serre, Legoherel, Weber 2013; Patuelli, Nijkamp 2015; Prayag 2012; Sangpikul 2008; Wang 2006]. In the case of seniors, the factors that push them to leave a place of permanent residence comprise: leisure, relaxation, physical activity, medical improvement, cognition, interpersonal contacts, relatives' and friends' visits, escape from everyday life, increased self-esteem. The pull factors, in turn, are of materialistic nature and include: natural and anthropogenic qualities, availability, cost, cleanliness and security. Regardless of the type of factors affecting seniors' tourist activity, they strive to maximise their travel experiences. This is due to their awareness of age limitations. Therefore, as long as their medical condition and psychophysical fitness allow it, they seek to make the most of their time spent travelling [Fleischer, Pizam 2002, p. 108].

Factors influencing tourist activity of seniors

Age

In this context, age is one of the most important factors influencing the activity of seniors. Unfortunately, despite the passing years and extensive literature, such a basic concept as to who a senior is, has not yet been defined [Le Serre 2008; Nielsen 2013]. In his extensive monograph on the ageing process, E. Rosset [1959] presented a dozen or so classifications of age, both traditional and scientific in nature. They were developed by physicians, physiologists, demographers and economists from the ancient times up until the mid-20th century. He states that all classifications are arbitrary and, unfortunately, always unreliable. As he emphasises, old age is the result of a long process occurring in the human body and therefore, it is impossible to determine the exact moment at which it begins. Nevertheless, he believes that one should accept a kind of fiction, which constitutes a conventionally accepted age limit of old age. Without such an assumption, it is not possible to make comparisons in both temporal and spatial terms.

J. Śniadek [2007] pointed out that while indicating the boundaries between mature and elderly people, one might be guided by economic, cultural, social or health criteria. However, none of the criteria alone make it possible to unequivocally identify when a person becomes a senior. The United Nations have agreed that 60+ is denoted as old age [*World Population Ageing* 2013]; WHO has set it at 50 years old [*Global Health and Ageing* 2011].

The majority of senior tourism researchers have not fixed a clear number denoting the beginning of old age. Some of their studies indicate the age of 45 as the onset of old age [Glover, Prideau 2009; Mitas, Yarnal, Cick 2012], others: the age of 50 [Kazeminia, Del Chiappa, Jafari 2013; Kohlbacher, Sudbury, Hofmeister 2011; Le Serre, Chevalier 2012; Moscardo 2005; Nimrod, Rotem 2010; Prayag 2012], still others: the age of 55 [Boksberger, Lasser 2008; Bombol, Słaby 2011; Chen, Shoemaker 2014; Esichaikul 2012; Fleischer, Pizam 2002; Gonzales, Rodriguez, Miranda, Cervantes 2008; Möller, Weiemair, Wintersberger 2007] or the age of 60 [Lee, Tideswell] and even 65 [Kim, Woo, Uysal 2015; Sund, Boksberger 2007; Tiago et al. 2016, Zimmer, Brayley, Searle 1995].

Some researchers link the question of belonging to the group of seniors with gender and accept the age of 55 for women and 60 for men [Hsu, Cai, Wong 2007]. This differentiation of the lower age of those examined, in the context of senior tourist activity, partly results from the subjective perception of the moment when old age begins according to representatives of modern societies. As F. Kolbacher et al. [2011 p. 343] state, the definition of an individual age category depends on a particular cultural circle and social environment. The comparison of seniors from four countries shows that the British and Germans feel 7 years, Hungarians 6.5 years and the Japanese 5.5 years younger. This phenomenon is confirmed by yet another example, i.e. the results of the study conducted in Portugal where the age of 51 is considered to be the onset of old age, 64 in Belgium and 67 in the United Kingdom [Józefów-Czerwińska 2015 p. 178].

A critical analysis of the definition of seniority age was conducted by Le Serre [2008], who states that there is no clearly defined age limit that can be considered as the very moment of life from which we begin to refer to a person as an elderly one. This is a major reason making it difficult to compare the results of studies presented in the literature as they concern different social groups, the representatives of which are called senior citizens.

A serious issue of methodological nature has arisen in connection with the above views. Nowadays, we are dealing with a situation in which the retirement age remains the longest stage in a person's life [Niezgoda, Jerzyk 2013, p. 476]. Can we then refer to seniors as a homogeneous social group if the lower age limit is, in extreme cases, 45 and the upper one reaches 80 and more? Within this context, it should be noted that the age span is over 35 years and it is difficult to talk about a group of similar characteristics and behaviours. For comparison, one may ask how much people at the age of 15 have in common with those at the age of 50. Approaching age-diverse people in the same way raises fundamental doubts as it leads to over-generalisation of research results and cause the development of unjustified stereotypes [Sedgley, Pritchard, Morgan 2011]. On the other hand, it should be emphasised that some researchers share a widespread perception concerning the heterogeneity of the elderly segment, which results in multiple divisions and classifications based on age, medical condition, financial status, marital status, having children and others.

Assuming, however, that age is the first criterion for differentiating elderly people, one should consider the conception of this notion. What remains the basic approach in both statistical or demographic classifications is, obviously, metric or chronological age. K. Nielsen [2014] notes, however, that although it is the most widespread criterion, the issue remains that ageing is individual and multi-dimensional. As contemporary researchers point out, due to the growing individualisation of consumption patterns in developed countries, applying only demographic criteria is not sufficient enough to explain the researched phenomena related to market behaviours of seniors [Bombol, Słaby 2011; Gonzales, Rodriguez, Miranda, Cervantes 2008; Le Serre 2008]. This is of particular significance in an economic sense, as the senior market is growing both in terms of purchasing power and the number of consumers themselves.

Applying the notion of subjective age, also called cognitive, is one of the attempts at solving this problem [Gonzales, Rodriguez, Miranda, Cervantes 2008; Hung, Petrick 2009; Józefów - Czerwińska 2015; Le Serre, Chevalier 2012; Nielsen 2014]. It is defined as the age at which a person perceives oneself. It consists of four subcategories: felt age, age of appearance, age of abilities and age of interest [Awdziej 2014; Gonzales, Rodriguez, Miranda, Cervantes 2008]. The attempts of segmenting the tourist market by applying cognitive age were carried out by, among others, Cleaver and Muller [1998] [who stated that tourism products containing an element of adventure, emotion or challenge were of more interest to those seniors who felt or behaved like individuals who were younger. Further research indicated that the new-age elderly valued independence more and were more willing to control a situation and expected a higher level of satisfaction than the traditional elderly. On the other hand, however, the hypothesis of the relationship between cognitive age and propensity for innovative consumer behaviours in the tourism market has not been confirmed [Gonzales et al. 2008 p. 152].

D. Le Serre and Chevalier [2012] made yet another attempt to measure age. In their study on motivations of seniors, the authors used the concept of discrepancy age, which constituted the difference between the subjective age and the ideal age, i.e. the age a person would like to be. Based on a survey of people aged 50+ in France, they indicated that those seniors with the highest levels of feeling age differences were most motivated by their desire to relax and rest.

The alternative concept of age classification was presented by W.C. Sanderson and S. Scherbov [2007] who introduced the concepts of retrospective and prospective age. Retrospective age is identical to chronological age, i.e. the number of years that a given person has lived, while prospective age is the anticipated number of years that a given person will live. They emphasise that applying the prospective age measure allows to better examine the phenomena of ageing, regardless of both the time period covered by the study and a specific demographic cohort. They present Ryder's opinion from the 1970s, who first suggested that the elderly age be determined by means of life expectancy which, as he stated, should be 10 years. Sanderson and Scherbov, however, suggest that it should be 15 years and define this measure as the remaining life expectancy or RLE 15 [Lutz, Sanderson, Scherbov, 2008]. The issue of alternative age measures in Polish literature is developed by A. Abramowska-Kmon [2011] who states that this type of approach allows for better characterization of life opportunities among older people. As an example, she presents a hypothetical Frenchman who in 2000 reaches the chronological age of 60 and has averagely almost 25 years to live – the same number of years as for a 43-year-old man in 1900. This example allows to notice the importance of the prospective age measure for the state's senior policy. The author also draws attention to the territorial aspect and points out that it is not possible to directly compare people living in countries with different levels of socio-economic development because they affects the health of residents and the expected duration of life.

As for the foregoing issue, many researchers draw attention to generational differences between so-called demographic cohorts [Kociszewski 2016]. The most important factor differentiating the tourist behaviour of seniors is not so much the age as belonging to a given generation who share common life experiences. Therefore, the presently retiring generation of baby boomers are fundamentally different in their tourist behaviour from previous generations of elderly people [Chen, Shoemaker 2014; Glover, Prideaux 2009; Hsu, Cai, Wong 2007; Hung, Petrick 2009; Kowalczyk-Anioł 2013; McCormack et al. 2008; McDougall 1998; Möller, Weiermair, Wintersberger 2007; Oppermann 1995]. They are characterized by a definitely higher level of tourist activity and more frequently prefer trips related to active and specialist tourism. Due to their higher income level, better health and physical conditions than previous generations of seniors, it is even said that this demographic cohort is becoming the most important segment of the tourism market on a global scale.

Despite the above-mentioned attempts to apply different age concepts in their research on seniors tourist activity, far more researchers use the traditional criterion of metric age. This type of research has shown that the level of tourist activity among people aged 55+ initially increases until the age of 65-68 and then decreases [Fleischer, Pizam 2002; Littrel, Paige, Song 2004; Zimmer, Brayley, Searle 1995]. In addition, younger seniors choose more active forms of relaxation during their travels but, as the years go by, they change their preferences. With more life experience, older tourists are more interested in leisure, environmental values, interpersonal contacts, as well as local cuisine and handicrafts. They also pay more attention to safety and a high standard of hygiene.

K. J. Sund and P. Boksberger [2007] drew attention to the influence of age on spatial behaviour of people over the age of 50 by basing their studies on the location of holiday homes rented by the Swiss in 23 countries. They showed that pre-seniors (aged 50-59) more preferably travelled abroad (33.2%), while the number for seniors (age 60 and over) was considerably lower (only 19.5%). This indicates the existence of age-related factors that contribute to limiting the distances travelled over the years.

A significant fact observed in Spain is that the average length of a tourist stay of people over 50 is 6% higher, and for those over 60, it is even 25% higher [Balderas-Cejudo, Rivera-Hernaez, Patterson 2016]. What is more, the same example indicates that people over 60 spend 18% more money than the average during their stay. The influence of age on the behaviour of elderly consumers with reference to the quality of hotel services was also examined by R.J. Callan and L. Bowman [2000]. They claimed that people over the age of 75 would expect facilities corresponding with their mobility-related restrictions resulting from their medical condition. The study conducted in Michigan, in turn, showed a relationship between age and the length of time horizon for travel planning. People over 68, planned their journeys 94 days ahead, whereas young respondents did it only two months in advance [Huh, Park 2010, p. 267]. This probably results from the fact that young people are more familiar with modern means of communication (Internet, computer, smartphone).

The foregoing review of age issues as a criterion for the active participation of elderly people shows that this is a complex issue requiring further research. As noted by H. Oh, S.C. Parks and F.J. De Micco [2002, p. 4], there is lack of any justification for applying a priori age criterion as a factor to differentiate seniors from younger participants during tourist trips. Furthermore, applying this criterion alone does not allow for proper interpretation of seniors' tourist behaviours as individual psychographic, socio-demographic and economic factors are significantly more important in this regard [Sedgley et al. 2010, p. 431; Sund, Boksberger 2007, p. 23]. This is related to the fact that modern seniors do not constitute a homogeneous group and age cannot be the only criterion for segmenting this social group, especially as the metric age does not usually coincide with subjective age.

Spare time

In the modern world, the issue of free time is considered in the broad context of civilisation changes. H. Linskog [2001, p. 77] points out that while time goes by in the same way for everyone in the world, the perception of its passage may be quite different. While people involved in work or having small children suffer from lack of time, children and adolescents, the unemployed and pensioners have much more of it. Those with more free time, however, do not usually have a high budget because they do not receive income from work. The opposite situation applies to those who receive income from work, but have little free time. "Time-poor / money-rich" / "time-rich / money-poor" are notions that most appropriately reflect the foregoing situation. As Linskog [2001, p. 78] notes, the group of people who can enjoy a large amount of free time today remains the largest one that has ever existed in our civilisation, as the number of retired people continues to increase and the number of children that are forced to work is decreasing.

The issue of seniors' free time should be examined in conjunction with other factors. The amount of spare time increases when children become independent and leave their family home. Terminating one's activity on the labour market and retiring is another factor contributing to the increase in leisure time. In this context, Milla and Morrison's opinion is of particular importance: "what we do during our working hours determines what we have, whereas, what we do in our free time determines who we are" [Alejziak 2012, p. 190]. To paraphrase, what one possesses in old age is determined by his or her professional career, whereas how one spends retirement will significantly affect the satisfaction of one's whole life.

Although there is a widespread opinion that retirement is a period of life which abounds in much free time, such a substantial increase in free time may be difficult to manage. [www.pastoralna.pl, 10.06.2017]. Giving up one's current commitment to work, breaking social ties or losing the prestige associated with one's occupation makes a retiree search for other forms of activities. Tourism remains one of the main forms of active leisure. The activity related to recreation among seniors takes on a really positive view. What should be noted, however, is that the level of involvement in this activity depends on the habits that were formed during earlier years of life [Panek 2007, p. 162]. The results of studies in different countries indicate that the increase in leisure time translates into the increase in the tourist activity of the society, but it does not concern professionally inactive people, i.e. pensioners, as free time is otherwise managed by them [Alejziak 2012, p. 193]. They spend a large part of time on housework, looking after their grandchildren or an ill spouse.

Studies conducted in the United States have confirmed that free time is not a limiting factor for tourism activity of people over 60 [Nyaupane, Andereck 2007 p. 5]. This opinion can be confirmed by an Australian example with the new trend in caravan tourism. It is based on a fundamental change of the type of tourists using campsites. Previously, the most numerous clients were families with school children, while nowadays, there are more and more elderly couples who set off for long, several months of journey when retired [Glover, Prideaux 2003]. The trend is also confirmed by the fact that there has been an increase in sales of campers for two and not four people, i.e. parents and two children, as it used to be. Losada et al. [2016, p. 92] reached the ambiguous conclusion as they determined that with the increase in the amount of subjectively perceived leisure time, the frequency of travels decreases. No connection between free time availability and the length of tourist stay has been confirmed [Alen et al. 2014, p. 28]. Researchers explain this phenomenon by other factors, among others: age, type of household or type of employment.

The issue of the way free time is spent by seniors has a strong cultural context among some societies. The results of the study among Korean seniors show that despite their interest in travelling (learning about natural values, visiting new places, maintaining good health), having free time and no restrictions, they do not participate in tourist trips [Lee, Tideswell 2005]. The cause lies in the culturally well-founded belief that elderly people should spend their free time with their family. What is more, when travelling, they would feel guilty of wasting their time while away from their circle of relatives.

Income level

The question of economic factors and their impact on taking up tourist travels is obvious and considered one of the most significant ones. In the case of international tourism, the top 30 most developed tourist markets account for 92 percent of all global spending [Middleton 1996, p. 39]. Obviously, the question of tourist demand is influenced by income and price levels in a given market and the higher the income, the higher tourism consumption [Alejziak 2012, p. 201]. As a majority of the research findings on the elderly show, there is a clear positive correlation between income levels and tourist activity [Chen, Wu 2009; Fleischer, Pizam 2002; Hsu, Cai, Wong 2007; Jang, Wu 2006; Huang, Tsai 2003; Zimmer, Brayley, Serale 1995]. In the case of elderly people, this basic relationship is additionally influenced by other factors presented in the article.

Basing on his research on Canadian seniors, Z. Zimmer et al. [1995, p. 6] also indicates that individuals with higher-income travel not only more frequently, but also over longer distances. In turn, CATI research conducted in Spain [Losada et al. 2016] showed a positive correlation between the level of income and the frequency of seniors' participation in tourist trips. Similar studies, carried out by E. Alen et al. [2014], did not reveal a statistically significant relationship between the length of tourist stay and the level of income. In the UK, a study performed on a small group of touristically active English-speaking senior citizens did not confirm any connection between personal income and the cost of accommodation as a criterion for choosing a hotel [Callan, Bowman 2000]. The authors pointed out, however, that the respondents paid more attention to the less fundamental issues, such as hotel staff approach to the elderly or hotel adaptation to the needs of people with reduced mobility. Another look at seniors' income has been provided by a comparative analysis on the average expenditure of US and European tourists aged over 55 and younger . It shows that seniors travelling to Israel spent on average around 7 per cent more than other tourists. They bore higher costs of, among others, accommodation, transportation, shopping, but lower costs of food and drinks [Cai, Schwartz, Cohen 2001]. This indicates that the level of income allowed seniors to spend more on travel than younger tourists.

The relationship between income and travel motives among seniors in Israel was emphasised by G. Nimrod and A. Rotem [2010]. People with the highest income proved to be most interested in active recreation, entertainment and physical activity during their tourist trips. In turn, French seniors with a lower budget preferred beach holidays, walks and swimming [Lehto et al. 2001]. They were not interested in activities requiring physical effort, such as visiting national parks or hiking in the mountains and cognitive tourism.

The issue of participation in tourist trips can by affected not only by one's personal income level but also the assistance of children or other family members [Wang 2006, p. 132]. The author points out that in some situations (people with low incomes, housewives, people with low education level), it is people who support seniors financially that have significant influence on their decision to participate in trips.

Medical condition

Tourist activity has been shown to have a positive effect on the subjective self-esteem of seniors, their health as well as their life satisfaction and its overall quality [Hunter-Jones, Blackburn 2007]. This relationship is bi-directional because seniors' medical condition has significant influence on decision-making in relation to travel directions and forms of activities undertaken at a tourist destination. People who consider their health as good are more likely to be motivated by push factors [Jang, Wu 2006], whereas people who have a worse opinion of their health, mobility constraints being the most frequent causes, choose shorter distances and such travels that require less physical effort [Fleischer, Pizam 2002; Kazeminia, Del Chiappa, Jafari 2013; Zimmer, Brayley, Searle 1995] or, in general, give up travelling altogether [Hsu, Cai, Wong 2007]. Health issues are closely linked with age. In their studies in Pennsylvania, S.C. Chen and S. Shoemaker [2014] indicate that when it comes to forms of participating in tourism, health and mobility deterioration begins after the age of 61.

An important factor concerning health status that is frequently raised by seniors are their concerns about distant visits to countries representing lower civilisation levels due to poor medical care standards and general sense of security [Hunter-Johns, Blackburn 2007]. The risk assessment associated with travel in the context of one's medical condition is often subjective and results from psychological determinants rather than medical ones [Hsu, Cai, Wong 2007 p. 1270]. The influence of seniors' well-being and their participation in tourist activity is not only related to somatic but also mental health.

Some of the most serious social problems of the elderly in the United Kingdom concern loneliness and related mental disorders [Morgan, Pritchard, Sedgley, 2015]. Unfortunately, single people's participation in various forms of tourist activity is frequently hampered unless supported externally or through self-involvement in the activities of social organizations for seniors. In this way, the issue of the health status of the elderly is linked to the theme of social tourism and the need for non-governmental organization activity.

A study on the relationship between subjective health state and travel frequency has been carried out [Losada, Alen, Dominguez, Nicolau 2015], although no relationship has been confirmed in this regard.

Nationality

The question of nationality and all related cultural determinants belongs to one of the most frequently discussed issues. Referring to the data from 135 countries worldwide, Cho [2010] claimed that the factors influencing tourist demand varied from country to country. While Europeans and Asians value cultural and natural aspects, Americans and Canadians choose closer destinations that are accessible by air and are inhabited by people with friendly attitudes. M. Kozak [2002], who had investigated the arrivals of the Germans and the British to Majorca and Turkey, came to some interesting conclusions. He claimed that the people of the same nationality were guided by different motives when choosing different directions of travel. Those British who travelled to Turkey, for example, were more likely to learn about its cultural values, whereas those travelling to Majorca were more attracted to leisure and sunbathing.

Having analysed a great amount of literature, A. Balderas-Cejudo, O. Rivera-Hernaez and I. Patterson [2016] claimed that there were significant differences between seniors from different countries regarding: travel behaviours, decisions regarding travelling, travel motives, personal features and external factors. The authors drew attention to some of the most important differences, among others: the fact that seniors living in the United States were less likely than other nations to take long journeys, or that the

English seniors travelled less often than other nationalities. Moreover, they were less likely to be away from their place of residence. The motives of travel most often concerned improving health status, maintaining good health, social contacts, education and leisure. However, there are some exceptions to these general statements. Leisure was a less important motive for seniors from the United States, while educational travels were less popular among the British than in the case of seniors from other countries. Particularly strong patriotic motives were observed among seniors in Asia, whereas for the Europeans, language skill improvement and the beauty were of importance. Socio-dynamic factors are similar throughout the world; age, personal income, health and leisure time being the most important ones. As for external factors, the foregoing researchers noted that special government programs supporting senior tourist activity can only be found in Europe.

The issue of the influence of nationality on the diversification of seniors' tourist activity has also been studied by other researchers [Jönsson, Devonish 2008; Kohlbacher, Sudbury, Hofmeister, 2011; Le Serre, Legoherel, Weber 2013; Tiago, de Almeida Couto, Tiago, Faria 2016]. The results of these studies point to different motives for travel, which are addressed by seniors from different countries. The comparative analysis of elderly people's motives in China and France may serve as an example. The French are geared towards exploring and gaining knowledge, while the Chinese are more interested in relaxation, physical activity and social contacts [Le Serre et al., p. 74]. The analysis of Europeans over the age of 65 was carried out by M.T.P.M.B. Tiago et al. [2016] shows that the Northern Europeans are eager to travel to the Mediterranean countries in search of sun, bathing and natural attractions. Seniors from Sweden, the Netherlands and Poland first choose visiting their relatives and friends, but also appreciate natural values, sun, beaches, wellness and SPA. The inhabitants of southern Europe, in turn, similarly search for the 3 x S holiday motives, but they are also eager to visit their relatives and friends and to participate in city tours. It can, therefore, be said that the most frequently recurring motives of travel among the European seniors are, irrespective of nationality, leisure, sunbathing and bathing, complemented by natural and cultural values and visiting relatives and friends.

Comparative analysis of the influence of nationality on the participation of seniors in tourism carried out on the example of 9 EU countries (Austria, Belgium, France, Greece, Spain, the Netherlands, Germany, Poland, Great Britain) and Norway indicates that the amount of pension in individual countries does not always decide about the level of tourist activity [Seweryn 2001, p. 640]. Polish seniors, to mention one example, assume 7th place in terms of the percentage of seniors travelling abroad, even though they have the lowest level of pensions among the 10 countries surveyed. This shows that various factors affecting the tourist activity of seniors are interrelated and considering them independently may lead to erroneous conclusions.

Sex

As many authors point out, there are significant differences in tourist behaviours between men and women. Men and women adapt to old age in a different way. Female retirees try to be active in their free time and participate in a variety of forms of education and creativity, as well as challenging activities [McCormack, Cameron, Campbell, Pollock 2008]. Researchers emphasise the significance of social roles played by both sexes and their impact on motivations and forms of undertaken tourist activities. Women pay more attention to maintaining and developing social relationships, while men focus on functional and instrumental benefits (improvement of health and physical condition) [Patterson, Pegg 2009; Lehto, O'leary, Lee, 2002].

In addition, it is women who first come up with ideas for travel. One reason for this is that they have stronger cognitive motivation [Yang, Wu 2006, p. 314]. Women's life expectancy is longer, and therefore, after the death of husbands, they choose package tours that provide social contact and greater security. Women also pay more attention to the costs of participating in tourist trips and treat it as an important limiting factor [Nyaupane, Andereck 2007, p. 5]. In research on the perception of accommodation standards, it has been found that women have a higher level of expectations as for the quality of tourist services than men [Callan, Bowman 2000; Oh, Parks, DeMicco 2002]. The hypothesis that sex influences the length of the tourist stay has not, however, been confirmed [Allen et al. 2014 p. 28].

Education

Alejziak claims that it is education that has a very positive effect on the level of tourist activity [2012, p. 355]. Similar findings referring to tourist activity of seniors have been reported by other researchers [Horneman, Carter, Wei, Ruys 2002; McDougal 1998; Omelan, Podstawski, Raczkowski 2016; Sangpikul 2008]. Z. Zimmer et al. [1995, p. 6], who conducted a study among people aged 65+ in Canada, also showed a statistically significant association proving that the higher the level of education, the higher the tendency to take tourist trips. Additionally, they noticed the same impact of education on the choice of more distant destinations. On the other hand, in his study on Japanese seniors in Thailand, A. Sangpikul [2008, p. 91] noted that the level of education is usually related to one's professional position which, in turn, translates into income which, finally, affects the travel budget. The issue of education is also related to motives of tourist travel. Horneman et al. [2002 p. 33] noted that better educated people seek new experiences and adventures while maintaining a high level of security. They are interested in natural and cultural values, but they look for information regarding them on their own. It has also been found that better educated people are more active in organising their own travels [Boksberger, Laesser 2008, p. 11]. It is probably due to better orientation concerning how to organise a trip. An important correlation between level of education and participation in tourist activity was also noted by Wang et al. [2007, p.14]. They found out that travel expenses of people with basic education may be substantially (up to 45 percent) covered by their children. As a result, the travel budget may be higher and, despite low income from retirement pensions, this would allow for a high level of tourist activity.

In the context of education, the Polish example of the Universities of the Third Age phenomenon should be mentioned. The world's first organisation of this type was founded in Toulouse, France in 1973, and in no later than 1975 in Warsaw [Halicki 2000, p. 118]. In 2015, there were 464 organisations of this type in Poland, of which the vast majority (75 percent) were created in 2006-2015 [CSO 2015]. It is obviously the educational aspect i.e. continuing education at an older age, that is important when taking the influence of belonging to these organizations into account [Halicki 2000, p. 43]. However, as stated by many researchers, apart from their educational function, these organisations play a significant role in socially activating their students and, particularly, making them participate in tourism [Głąbiński 2014; Grudziński 2013, Hołowiecka, Grzelak-Kostulska 2013; Kowalczyk-Anioł 2011; Panek 2007; Śniadek, Górka 2016; Trafiałek 2006]. According to statistical data [Raport Zoom on UTW 2012, CSO 2015], over 95 per cent of UTW (University of the Third Age) organise various forms of recreational and tourist activities. Such significance of tourism in UTW's activities is undoubtedly connected with the fact that among students, there are definitely people with secondary (49%) and higher education (39%).

Place of residence

A factor undoubtedly influencing the forms of undertaken tourist activity, not only in the context of a given country and nationality, is the place of residence [Alejziak 2012, Deja 1986; Nowakowska 1989]. A number of researchers point to this relationship in the case of differences between seniors living in the city and the countryside [Górka 2010; Omelan, Podstawski, Raczkowski 2016; Preferences ... 2011, Stasiak 2011a]. They state that seniors living in rural areas present a definitely lower level of tourism activity than city dwellers. This phenomenon is influenced by numerous, different factors, including lack of access to tourist offers, specificity of agricultural work and frequently, tourist values of the place of residence itself.

Travel companion

Loneliness of the elderly constitutes one of the significant factors influencing the issue of tourist activity. As research confirms, the feeling of lack of companionship grows with age [Gutkowska, Słaby 2016, p. 49]. Loneliness often involves the feeling of being discouraged from travelling because of the lack of company. The need to have a travel companion has been mentioned by numerous authors [Głąbiński 2016, Grzelak-Kostulska, Hołowiecka, Środa-Murawska, Biegańska 2014; Huang, Tsai 2003; Kazeminia, Del Ciappa, Jafari 2013]. The absence of companionship is a serious obstacle for seniors to participate in tourist trips. That is why they often travel with a group of friends with whom they have long-term friendships and create a so-called 'surrogate' family [Decrop, Pecheux, Bauvin 2004. Travelling is, on the other hand, a great opportunity to meet new people, which constitutes an important motive to undertake tourism [Chen, Shoemaker 2014; Chen, Wu 2009; Głąbiński 2016, Hillman 2012, Jang, Wu 2006]. Europeans are, in this respect, less motivated than the Chinese [Le Serre et al. 2013, p. 74], which is due to cultural determinants leading to collective behaviours among the Chinese and individual ones among the Europeans. The results, moreover, indicate that seniors use common elements of travel (meals, social evenings, sightseeing) to establish and maintain long-term relationships. Interestingly, Spanish seniors travelling solo preferred longer stays [Allen et al. 2014]. This may indicate looking for an opportunity for social gatherings. When searching for a companion to travel with, people living alone indicate that they most likely travel with people of similar age [Grzelak-Kostulska et al. 2014, p. 91; Hołowiecka, Grzelak-Kostulska 2013, p. 173]. Hence, the growing popularity of affiliation to seniors' organisations, including the Universities of the Third Age [Hołowiecka, Grzelak-Kostulska 2013; Panek 2007; Trafiałek 2006]. The need for socialisation is closely linked with both mental and physical well-being [Hsu et al. 2007, p. 1270]. This is yet another argument for the idea that the determinants of tourist activity of seniors should be considered in the broadest possible context and taking various factors into consideration.

Political and administrative factors

State policy constitutes another significant group of factors affecting the tourist activity of seniors. The instruments of the state social policy are of particular importance in relation to groups for which participation in tourism may be difficult, among others, seniors, especially those with health restrictions, suffering from disabilities or having particularly limited financial resources.. This issue is increasingly reflected in the literature [Buhalis, Darcy, Ambrose 2012; Gryszel 2012; Gryszel, Jaremen, Rapacz 2012; Stasiak 2011; Zielińska-Szczepkowska, Źróbek-Różańska 2014]. In recent years, the "Europe Senior Tourism" program has aroused special interest among both researchers and practitioners as well as tourists themselves [Górna 2015; Grabowski 2011; Kowalczyk-Anioł 2011, Preferences 2011]. The program enabled over ten thousand seniors from Poland to stay at four-star hotels in Spain (Andalusia and Balearic Islands) at very favourable prices, which resulted from funding the program by the Spanish government. Two types of benefits emerged from the program: economic and social. The latter concerned an increase in cognitive activity of Polish seniors and their tourism experience. Unfortunately, the program was terminated after the second edition. However, the interest of seniors in this type of trips proves that further actions of the state are necessary in this area, but there are no systemic solutions at present.

Summary

The literature review presented above allows for the formulation of several generalizations:

1. The main problem in the analysis of tourist activity among the elderly, which has still not been resolved, is the attempt to answer the question of who a senior is. Despite numerous attempts, not a single or not even a few criteria have been identified so far that would unambiguously separate this group from the whole of society. Undoubtedly, the age criterion of isolation from the level of professional activity, medical condition and stage of life is not sufficient to indicate the contractual limit from which a person starts to be considered a senior. Since individual authors consider different ages and other socio-demographic characteristics of seniors in their proposed typologies of elderly people's behaviours regarding tourist activity, there are many difficulties in comparing the results of their studies.
2. Cultural differences between the societies of individual countries, conditioned by historical processes and geographic conditions and their impact on the current level of socio-economic development, are the main factors in differentiating the behaviours of the elderly.
3. When selecting their travel directions and forms of activities undertaken at a destination, seniors try to take their internal limitations (medical condition, age, finances, need to look after a family member) into account, and adapt opportunities to objectively existing external conditions (tourist values, infrastructure, transport accessibility).
4. It is advisable to continue research on cultural differences between the societies of individual countries with regard to the forms of active tourism undertaken by seniors, as this is of practical significance due to the increasing importance of this tourist market segment.

5. The article presents only selected conditions concerning the tourist activity of seniors because this is a very extensive issue, while the aim was only to identify the most important ones in the author's opinion.

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DETERMINANTY AKTYWNOŚCI TURYSTYCZNEJ SENIORÓW W ŚWIETLE WSPÓŁCZESNYCH BADAŃ

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Abstrakt

Cel. Celem artykułu jest identyfikacja głównych uwarunkowań aktywności turystycznej seniorów w różnych krajach świata w oparciu o literaturę.
Metoda. Studia literaturowe.
Wyniki. Analiza literatury pozwoliła na stwierdzenie, że wśród najważniejszych czynników wpływających na aktywność turystyczną seniorów należy wymienić: wiek, stan zdrowia, płeć, narodowość, poziom dochodów, towarzystwo w podróży, wykształcenie, towarzystwo w podróży i miejsce zamieszkania.
Ograniczenia badań i wnioskowania.
Zaprezentowano rozważania oparte o wybór prac dostępnych we współczesnej literaturze polskiej i międzynarodowej. Należy zwrócić uwagę, że większość prezentowanych wyników dotyczyła badań o charakterze jednorazowym i krótkookresowym dotyczącym określonego kontekstu społecznego i geograficznego. W związku z tym zaprezentowane wnioski są obarczone pewną dozą subiektywizmu wynikającą z doboru źródeł.
Implikacje praktyczne.
W Polsce można zaobserwować w ostatnich latach znaczący wzrost zainteresowania zagadnieniem aktywności turystycznej seniorów szczególnie wśród przedstawicieli różnych dyscyplin naukowych, natomiast kwestia znaczenia segmentu osób starszych dla gospodarki turystycznej oraz dostępności oferty dla seniorów wśród praktyków wymaga ciągle działań uświadamiających. Z tego powodu zaprezentowany przegląd uwarunkowań dotyczący turystyki seniorów może przyczynić się do większego zainteresowania tym problemem przedstawicieli biznesu turystycznego oraz osób odpowiedzialnych za politykę turystyczną.
Oryginalność.
Artykuł prezentuje w skondensowany sposób przegląd wybranych czynników wpływających na aktywność turystyczną seniorów w różnych krajach świata.
Typ artykułu.
Artykuł o charakterze przeglądowym.
Słowa kluczowe: turystyka seniorów, aktywność turystyczna, motywy podróżowania.

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CONDITIONING ACTIVITY AND TOURIST DESTINATION OF THE CHICAGO POLONIA IN LIGHT OF LITERATURE AND RESEARCH

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Abstract

Purpose. Presentation of activity and the choice regarding tourist destination of the Chicago Polonia. Discussing the determinants of the tourist activity in the light of literature and creating one's own model of activity and tourist destination for the whole American population.
Method. Desk research – studies of foreign and Polish literature. Empirical research concerning tourist activity and the choice of destination by the Chicago Polonia in the form of a survey questionnaire. The research group included 1,014 people divided into 7 age sub-groups. The applied methods and statistical techniques: chi^2, degree of freedom (df) and level of statistical significance (alpha).
Findings. In all age groups, the factors deciding about tourist activity of the respondents and the choice of tourist destination include: the price, the cost of the trip, in second place – development of tourist facilities and in the third– fashion. The largest barrier in undertaking tourist activity for the Chicago Polonia is lack of free time (37.6%), financial barrier (31.4%) and occupational work (17.4%). Individuals who form a single-person household do not travel more often than those who run multi-person households.
Research limitations and conclusions. The empirical research included only American Poles living in the Great Chicago Metropolitan Area and not the whole population of American Poles.
Practical implications. The research presents the level and nature of participation in tourism of the Chicago Polonia as well as characteristics of seven factors which mutually interact and influence activity and tourist destination of them.
Originality. There is a large research group. Creating one's own model of tourist activity including internal (demographic, social, cultural, economic) and external factors (geographical, political and legal , organization of tourism).
Type of paper. The article presents the results of empirical research and contains a review nature of the tourist activity models known in the subject literature.
Key words: tourist activity, barriers in undertaking tourism, Polonia, Chicago, tourist activity models, tourist destination

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Introduction

The market of tourist services is subject to continuous transformations. This is influenced by numerous factors – political, economic and even technological ones. There are many ways to make sightseeing attractive and turn trips to new places into real adventures bringing lots of excitement and interesting memories. Walking or reading the information from a guidebook is becoming boring for many tourists and more and more people are starting to look for something new and special during their trips [Ziółkowska-Weiss 2014].

The importance of tourist activity refers to the entire range of behaviours of people related to their participation in various forms of tourism, i.e. resulting from good will and temporary trips outside the permanent place of residence as long as the basic purpose of such trips is not gainful employment in the visited town. This general idea of tourist activity is particularly significant for theoretical divagations, however, unfortunately, it is occasionally based in the empirical research. This results mostly from difficulties which the definition itself generates (especially when a vague definition of 'the entire range of behaviours of people' appears in it) as well as from still imperfect research methodology concerning tourist activity, particularly within the statistical scope [Alejziak 2011].

According to A. Nowakowska [1989], the variety of the level of tourist activity insubsequent social groups is becoming a natural phenomenon impossible to be eliminated. Tourism constitutes a phenomenon to which social differentiation has been practically attributed ever since tourism research. Taking into account the differentiated nature of tourist activity, it turns out that this is something obvious since it results from individual motives, needs and tourist preferences. While analyzing the social diversity of participation itself in tourism, it appears to be an important social problem [Alejziak 2007]. From the perspective of tourism policy and functioning of the tourist market, the widest possible participation of the social groups in tourism which – apart from social functions important both to the state and tourist business – are fulfilled by health, educational, relaxation, cognitive, political and ethnic functions, which are quite vital. Consequently, these factors have influenced the fact that tourist activity has no longer been a private issue of the citizens in many countries, yet, it has become a social matter and part of the tourism policy.

The main objective is to present activity and the choice of tourist destinations by the Chicago Polonia and discuss the determinants of tourist activity in the light of literature and research. My own model of tourist activity and tourist activity for the whole American population including external and internal factors will be presented in the article. The results of empirical research conducted among 1,014 people and divided into 7 age subgroups will be shown. The most important factors and inhibitors (barriers) deciding about tourist activity and the choice of tourist activity by the Chicago Polonia will be analyzed. The research hypothesis stating that the size of the household of the Chicago Polonia influences frequency of travelling will be discussed.

Determinants of activity and tourist destinations – review of literature

Tourist activity is a concept which can more and more frequently be found in various theoretical, economic, sociological, psychological, pedagogical or geographical studies. While defining it, numerous difficulties which may result from the interdisciplinary nature of this phenomenon are encountered. The concept of tourism itself is ambiguously specified in the subject literature. It is also difficult to define the notion of 'activity', which is a very general concept.

B. Włodarczyk [1999] understands tourist activity as:

- tourist activity *sensu largo*, including: human ability to go hiking, to undertake tourism, active tourism, acting for tourism;
- tourist activity *sensu stricto*, expressed in practising tourism;
- 'unintentional transformation of the geographical space' – all signs of tourist activity of man, leaving no permanent elements of tourism development;
- 'deliberate transformation of geographical space' – including all informal activities (individual or group), aimed at adapting the space to one's own needs for rest and recreation, e.g. tourist settlement;
- actions for tourism – including all institutionalized activities, adapting the geographical space to tourism to achieve benefits (social or economic ones).

In the Polish subject literature, the notion of destination is quite rare. This term appears more frequently in the industry jargon of travel agencies. Recently, it has been disseminated from English literature (tourism destination) and it is used most often in spatial analyses of tourism (domestic and international). In Poland, other terms to determine the directions of tourism are used more often.

Some researchers, e.g. K. Parzych [2011], regard the concept of tourism destination as a synonym for tourism space, and this one is described, among others, by B. Włodarczyk [2009] as 'tourism space defined as a part of the geographical space, including towns, regions with specific tourist values of the geographical environment and reception values, being the place of implementation of tourist trips'. In this study, tourism destination is understood as a geographical unit (city, region, country, island, state), a fragment of tourism space, chosen by the tourist as a travel destination.

Here, it is worth organizing the most important determinants of tourist activity quoting particular classifications of its conditioning. Most frequently, typologies focus on classifying specific factors into groups. Dichotomous classifications are most frequently found. These typologies include the following typologies: typology by M. Jedlińska [2006], M. Zawadzki [1993], A. Krzymowska-Kostrowicka [1999], H. Wasiak [1978] or C. Cooper [1999].

M. Jedlińska [2006] divided determinants of consumer behaviours into external and internal factors. Among the factors, there are three sub-groups in the first group: economic, social and cultural as well as regional factors. The group of economic factors includes the ones in macro-scale (national economy, society), factors in micro-scale (income, savings, loans) and marketing factors (the impact of marketing effects on the decision-making process). The group of social and cultural factors includes, among others, the impact of reference groups and the influence of widely understood culture that shapes the way of spending free time. In the group of regional factors, the author placed: level of infrastructure development, location of the region and local patriotism. The internal factors include – according to the author – the following factors: needs, perception, attitudes (preferences), personality, learning and risk.

M. Zawadzki [1993] differentiates two groups of the factors conditioning tourist activity: factors influencing the need for relaxation combined with travelling, e.g. traditions, educational influence of the family, school, peer group, mass media, fashion and factors related to the possibility of satisfying and implementing the need for a trip (health condition, financial situation, occupational duties, family duties and school duties). The second group of factors mostly has impact on the level of tourist activity, whereas the mere fact of participation in tourism is determined by both groups.

A. Krzymowska-Kostrowicka [1999] thinks that each human behaviour (including tourist behaviour) is the effect of interaction of numerous factors, both internal and external ones which influence the activities undertaken by individuals with varying power. The endogenic factors constituting the base of external influences, genetically and physiologically determined, are complemented by a wide range of exogenic (environmental and socio-cultural) factors. The author emphasizes the importance of social factors in the socio-cultural impact group.

H. Wasiak [1978] distinguished groups of socio-economic and psycho-sociological factors. The first one included the level of wealth of the country and population, income of the population, prices, expenditures from the state budget as well as the regional budgets for tourism, population structure taking into account age, education and socio-occupational status, supply of tourist goods and services. The second group included needs, motives and tourist preferences.

C. Cooper et al [2008] divided the determinants of tourist activity into two levels: participation in tourism at the level of individuals and participation in tourism at the level of countries. The first group of factors includes income and employment, holiday privileges and a group of other factors de-

Tab. 1. Dichotomous typology of tourist activity

Author	**Dichotomous typology**	
M. Jedlińska [2006]	**External factors** – economic factors – social and cultural factors – regional factors	**Internal factors** – needs – perception – attitudes (preferences) – personality – learning and risk
M. Zawadzki [1993]	**Factors conditioning the need for relaxation** – tradition – educational impact (school, family) – mass media impact – fashion	**Factors related to the possibility of satisfying and implementing the need for travelling** – health condition – financial situation – occupational duties, family duties, school duties
A. Krzymowska-Kostrowicka [1999]	**Endogenic factors** – genetic – physiological	**Exogenic factors** – environmental – socio-cultural
H. Wasiak [1978]	**Socio-economic factors** – level of wealth of the country and society – population income – prices – expenditures from the state budget and regional budgets for tourism – age – education – socio– occupational status – supply of tourist goods and services	**Psycho-sociological factors** – needs – motives – tourist preferences
C. Cooper et al. [1998]	**Participation in tourism at the level of individuals** – income and employment – holiday privileges – gender – race – openness to promotion and advertising	**Participation in tourism at the level of countries** – economic factors – political factors – demographic factors – technological factors

Source: Author's own compilation.

termining tourist activity, such as: sex, race, openness to promotion and advertising. The second group includes economic, political, demographic and technological factors.

Table 1 presents the dichotomous typology of tourist activities concerning the above-mentioned researchers with the factors conditioning them.

Tourist literature also contains trichotomic typologies consisting of three groups of factors. These include typologies by L. Bomirska, G. Gawlak-Kica and E. Kraśnicki [1988], A. Wartecka-Ważyńska [2007] or A. Nowakowska [1989].

L. Bomirska, G. Gawlak-Kica and E. Kraśnicki [1988] distinguish three groups of factors determining tourist activity. These include demographic (age, gender, marital status), social (social origin, social environment) and economic factors (standard of living). A. Wartecka-Ważyńska [2007] distinguishes the social, economic as well as organizational-institutional conditions of tourism.

A. Nowakowska [1989] presented the typology with characteristics of conditioning for tourist activity [1989]. She presented it in three categories: factors characterizing personality of the potential tourist, factors shaping decisions about implementation of the trip and factors influencing the tourist trip itself. In the first group, the author placed social and economic factors which determine a tendency to travel or a lack of this tendency. In the second group, there were factors influencing the decisions related to departure (time of departure, place of staying, way of organizing the trip, etc.) and the third group included factors determining the stay itself (particularly the forms of activity undertaken during the stay).

Another attempt to prepare typology was made by W. Alejziak [2009] who wanted to explain the mechanisms of tourist activity formation within the framework of the research project conducted in the years 2006 to 2007. The result of this work is differentiation of three basic types of conditions for tourist activity: generators, activators and modifiers. Generators are defined as the factors which induce tourist activity raising the awareness of the desire to undertake tourist activity by individuals and tendency to take specific actions in this direction. This is not identified with making decisions about a specific trip. The most important generators include tourist needs and motives for tourism.

Activators constitute the second type of conditioning for tourism activity. They are described as factors allowing to undertake tourist activity, i.e. the ones that make the desire for the trip which was carried out earlier thanks to generators turn into the activities leading to real undertaking of tourist activity. The most important activists include free time and all economic factors (prices of tourist services, income, supply of tourist services and demand for them). Modifiers are defined as the factors influencing the shape and nature of tourist activity. The most important modifiers of tourist activity include: socio-cultural (e.g. lifestyle, influence of reference groups), natural and geographic (e.g. place of residence, climate), biological factors (e.g. health condition, gender), demographic (e.g. sex), particular economic factors and many others.

Modifiers constitute the largest group of factors, however, as the author of this typology thinks, they have smaller impact on the level of tourist activity than generators and activators. In the suggested concept, all elements remain in mutual relations and a specific factor may be a generator, an activator or a modifier – depending on the situation.

W. Alejziak also presents the division into internal (subjective) and external factors (objective). The first group of internal factors includes tourist needs, motives for tourism, tourism values, attitudes, aspirations and irrational factors. The second group of external factors includes free time, economic, biological and health conditions, demographic, socio-cultural, natural and geographical conditions, technological, political and other conditions (tourist supply, tourism experience, fashion, mass media, tourism marketing).

Table 2 presents the trichotomic typology concerning tourism activities of the above-mentioned researches. These activities include their conditioning factors.

Identification of factors having impact on the choice of destination is necessary while creating the proper marketing strategy. The factors influencing the choice of destination include age, income, gender, personality, education, costs, distance, nationality, risk and motivation, etc. Among the above-mentioned factors, motivation to travel has always been considered an important issue and – as a result – it was of great research interest in literature. Motivation – as a dynamic concept – can vary depending on the person, market segment, destination and decision-making process [Uysal, Hagan 1993]. Thus, it is not surprising that the motivation concept is regarded as part of the market segmentation in tourism in numerous empirical studies [Kozak 2002; Yavuz, Baloblu and Uysal 1998]. One of the most popular typologies concerning understanding the motivation for travelling is the 'push' and 'pull' model by J. Crompton [1979]. Push motives have been considered important to explain the desire for travelling whereas pull motives are significant to explain the destination choices themselves. Crompton described seven socio-psychological (push) motivations (escape, self-exploration, relaxation, prestige, regression, building family bonds and social interaction) and two cultural (push) motivations (novelty and education). M. Uysal and C. Jurowski [1994] summarized the external (push) and inner (pull) motivators. The internal motivators include: desire to escape, rest, relaxation, a sense of prestige, health and fitness, adventure and social interaction. External motivators were based on attractiveness of the target taking tangible factors (into account beaches, leisure activities and cultur-

Tab. 2. Trichotomic typology of tourist activity

<table>
<tr><th>Author</th><th colspan="3">Trichotomic typology</th></tr>
<tr><td>L. Bomirska,
G. Gawla-Kica,
E. Kraśnicki [1988]</td><td>Demographic factors
– age
– gender
– marital status</td><td>Social factors
– social origin
– social environment</td><td>Economic factors
– standard of living</td></tr>
<tr><td>A. Wartecka-Ważyńska [2007]</td><td>Social factors</td><td>Economic factors</td><td>Organizational and institutional factors</td></tr>
<tr><td>A. Nowakowska [1989]</td><td>Factors characterising personality of the potential tourist
– social factors
– economic factors</td><td>Factors shaping decisions about implementation of the trip
– time of departure,
– place of staying,
– way of organizing the trip</td><td>Factors influencing the tourist trip itself
– forms of activity undertaken during the stay</td></tr>
<tr><td>W. Alejziak [2009]</td><td>Generators
– tourist needs
– motives for tourism</td><td>Activators
– free time
– economic factors</td><td>Modifiers
– social and cultural factors
– natural and geographical factors (place of residence, climate)
– biological factors (gender, health condition)</td></tr>
<tr><td>W. Alejziak [2009]</td><td colspan="2">Internal factors (subjective)
– tourist needs
– motives for tourism
– tourism values
– attitudes
– aspirations
– irrational factors</td><td>External factors (objective)
– free time,
– economic conditions,
– biological and health conditions,
– demographic conditions,
– socio-cultural conditions,
– natural and geographical conditions,
– technological conditions,
– political conditions,
– other conditions (tourist supply, tourism experience, fashion, mass media, tourism marketing)</td></tr>
</table>

Source: Author's own compilation.

al attractions) as well as perceptions and expectations of a traveller (novelty, expectations of benefits, marketing image). In the research conducted in 2003, shopping was added as a motivator for the goal [Hanquin, Lam 1999; Sirakaya, Uysal and Yoshioka 2003]. H. Oh, M. Uysal and P. Weaver [1995] found that good shopping was recognised as an attractive factor and an attribute regarding the choice of tourist destination.

There are still other important factors, such as target image, food and safety. A. Milman and A. Pizam [1995] state that the target image is a visual or mental impression that the people generally have of a particular place. The role played by the mental image for an attraction was described in detail by C. Goossens [2000]. Eating is one of the most pleasant activities tourists are offered on holidays [Ryan 1997]. S. Quan and N. Wang [2004] found that food can act as a primary or secondary motivator and it enriches the value of the destination image. Security is an important issue for tourists [Middleton 1994]. V.C.S. Heung, H. Qu and R. Chu [2001] discovered that safety constituted the top priority for travellers in Hong Kong, the United States and Taiwan. The last observed trend has shown that people from developed countries seek assistance from health professionals in developing countries. This preference shift is generally referred to as medical tourism and it has recently been in the centre of attention in the tourism industry. As a result, treatment can be considered as a motivational factor in this case. The research concerning motivation of the tourists in this case is based on Crompton's push-pull model. The main factors influencing purpose have been divided into categories. The push motivator related to the internal forces consists of 4 factors (psychological, physical, social interaction and searching/exploration) whereas the pull motivator is associated with the external forces and it consists of 2 factors (tangible and intangible).

Model of conditioning activity and tourist destination of the Cchicago Polonia

Knowing the classification of factors conditioning tourist activity and specificity of the Chicago Polonia in the subject literature, the author has introduced her own well-developed classification aiming at conducting an accurate and complete analysis of all the issues of her interest. The model that has been introduced and suggested by the author constitutes a dichotomous division taking into account as many as 34 different indicators influencing the activity and choice of tourist destinations by the Chicago Polonia. A different, existing model which would include as many variables and determinants influencing the tourist activity is unknown to the author. Review of the literature and demonstration of the tourist models suggested by other authors in the article allows the reader to compare them with the tourist model proposed by the author of the article which was applied in the research on the Chicago Polonia.

The author has constructed her own model of conditioning the activity and tourist destination according to the needs of research. These conditions were divided into external and internal ones. Knowing the specificity of the Polonia living in the Great Metropolis of Chicago, she included a number of factors interacting with each other and influencing the activity and tourist destination of the Chicago Polonia. Among the internal conditions, she distinguished demographic, social, cultural and economic factors. The external conditions included legal and political and geographical factors as well as the organization of tourism. Fig. 1. describes the model of activity and tourist destinations suggested by the author. According to her, all of the above-mentioned factors have impact on both the activity and tourist destination chosen by the Chicago Polonia.

While characterizing both internal and external factors, the author has taken numerous indicators into account that were thoroughly examined and she has determined the extent they influence the activity and tourist des-

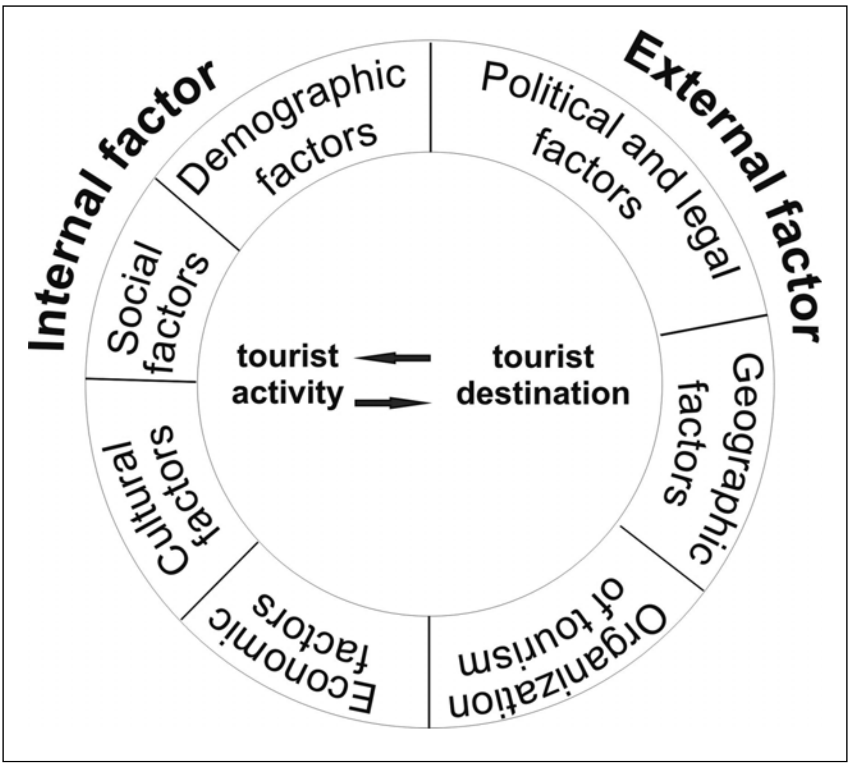

Fig. 1. Model of conditioning activity and tourist destination.

Source: Author's own compilation.

tinations of the Chicago Polonia. Table 3 presents the indicators assigned to the appropriate factors. The author included gender, age and size of the household in the group of demographic factors. The social factors included family situation, family patterns, membership in organizations and individual desire to travel (getting to know new places, willingness to broaden knowledge regarding a specific place). The cultural factors included sense of national identity, religious conditions and the fashion for a particular tourist destination. The following have been examined in the group of economic factors: the level of income, travel expenses, assessment of one's own financial situation, the respondents' assessment of their professional situation and the fact whether the price and cost of departure constitute important indicators regulating activity and tourist destination.

Among the political and legal factors, the following indicators have been distinguished: residence status, holiday privilege, national holidays generating a day off and the sense of security in a place of resting. The geographical factors included: location of the place for resting (climate, weather, an exotic nature of the place), transport accessibility, time of arrival to the place for rest, tourist values (unspoilt nature, silence, peace) as well as residence of the respondents. Organization of tourism constituted the last indicator in the group of external conditions. As part of this factor, she examined the offer of travel agencies in the Great Metropolis of Chicago, tourist attractions in the region of perception, conditions for practising various sports disciplines and its development of tourism.

While investigating the factors influencing tourist activity and the choice of tourist destination by the Chicago Polonia, the author has also examined whether there are any inhibitors (barriers) hampering the process of formation and undertaking tourist activity which consequently influences the choice of tourist destination.

Among the social factors, the author distinguished three inhibitors: lack of free time, lack of family traditions and family situation. The financial situation which the author asked the respondents about was the main barrier inhibiting tourist activity and the choice of destination among the economic barriers. Occupational work can be a barrier among the political and legal factors whereas lack of necessary equipment or lack of equipment accessibility may constitute a barrier in the organization of tourism.

While discussing the determinants of activity and the tourist destination of the Chicago Polonia, describing the particular features which influence them, the author has presented their general characteristics for all age groups together.

The research material collected by the author for several years is extensive and it can be used for numerous scientific studies. The author has described each of the factors in the model (cultural, social, economic, political and legal, demographic, geographic and organization of tourism) in sep-

Tab. 3. Factors of conditions for activity and tourist destinations.

Internal factor	Indicator / Feature	External factor	Indicator / Feature
Demographic	– gender – age – size of the household	**Political and legal factors**	– residence status – vacation privilege – national holidays providing a day off from work – sense of security in a particular place – barrier caused by occupational work
Social	– family situation – family patterns – lack of family traditions – membership at an organization – individual desire to go out / get to know new places – lack of free time	**Geographic factors**	– location (climate, weather, the exotic nature of the place) – transport accessibility – time of arrival – tourist attractions (unspoilt nature, silence, peace) – residence of the respondents
Cultural	– sense of national identity – religious conditions – fashion	**Organization of tourism**	– offer from travel agencies – tourist attractions – tourist development – conditions for practising various sports – lack of necessary tourist and sports equipment
Economic	– income level – travel expenses – assessment of one's financial situation – occupational situation – assessment of the occupational situation – price, cost of the journey – financial barrier		

Source: Author's own compilation.

arate articles. On the basis of the collected results of research, a scientific monograph entitled 'Activity and Tourist Destinations of the Polonia Living in the Great Metropolis of Chicago' was also created where, among others, there are 7 detailed maps showing the choice of tourist destinations by the Chicago Polonia.

Methods and the course of research as well as temporal--spatial scope of the empirical research

The main area of research was the Great Metropolis of Chicago which was chosen by the author because of the largest population of the Poles in the United States. Six counties comprising the Great Metropolis of Chicago constituted the area of empirical research conducted by the author. These were the following counties: Cook, DuPage, Kane, Lake, McHenry, Will and the city of Chicago situated in the Cook County.

Collection of the empirical material proceeded in three stages. The first one took the form of pilot studies, the main purpose of which was to verify the research tools. The pilot studies were carried out at the end of 2013.

The study period included the years 2013 and 2014. Research in the USA was carried out in two phases. The first stage of field research took place during the period from 6 February 2014 to 18 February 2014, whereas the second one was implemented during the period from 16 October 2014 to 29 October 2014. The author applied both qualitative and quantitative research.

Survey questionnaires, conducted among a large group of respondents, mainly constitute the quantitative research. They enable answering the question 'how much/many'?, e.g. how many people go on holidays during the year? The proper selection of research sample allows to examine the number of people whose results are representative of the whole population. The quantitative research enables us to determine the frequency of the particular phenomenon in a specific population. The quantitative research applied in the author's work includes: diagnostic survey method in the form of surveys. The survey questionnaire constitutes a method allowing to obtain the necessary information by asking a selected group of people questions via a printed list of queries called a survey questionnaire [Zaczyński 1988]. The survey questionnaire can be applied once by sending it to the respondents in order to receive their written answers to the questions.

The results of the research conducted among the Poles living in the Great Metropolis of Chicago constituted the empirical basis. The empirical part of the research was in the form of a diagnostic survey conducted with the application of the representative method among the population of the Poles of the Great Metropolis of Chicago. The research proper included a total of 1,468 respondents, where 1,014 survey questionnaires, including the online survey 347 - the so-called CASI in Polish and English - were used. The remaining part of the surveys was conducted traditionally in written form, handing out the questionnaires personally to respondents and requesting they complete them [Ziółkowska-Weiss 2017].

The Consulate General of the Republic of Poland in Chicago stated that at the end of 2013, according to their data, there were approximately 1,300,000 Poles within the territory of Illinois. These are Poles who have a regulated residence status, however, there is a great number of people (impossible to check in any way, even via immigration services or representatives of the Polish embassy) who illegally maintain within the territory of Illinois. The author has assumed that she would examine 0.01% of the Polonia population from the number of 1,300,000, which gives 1,300 people. In her research, the author did not include the youngest representatives of the population, i.e. children aged 0-14 as – according to the author – these are people who travel with their parents and for formal reasons, they would not be able to complete the questionnaire correctly. Therefore, 1,014 questionnaires were subject to final analysis, excluding the youngest age groups, which accounted for 286 people.

To make the examined group representative, data from the Census Bureau 2013 and the Yearbook of Immigration Statistics 2013 were applied, and the structure of gender and age of the respondents in a specific age group in relation to the whole population of Poles living in the Great Metropolis of Chicago were calculated. The surveys were conducted among respondents at the age ranging from 15 to 60 and over. The research group was divided into 7 subgroups according to age, respectively. The first group included the respondents aged 15-19, the second group – at the age 20 to 24, the third group - 25 to 29 years, the fourth group - at the age from 30 to 39, the fifth group – aged 40-49, the sixth group –from 50 to 59 and the seventh group – at the age from 60 and over.

In order to verify the determinants of activity and tourist destinations influencing one another, the chi-square test of independence which allows to determine the statistical significance of the relationship between two variables measured on the nominal scale (i.e. qualitative data) has been used in an attempt to find answers for the proposed hypotheses. The chi-square test of independence (x^2) is based on comparing the number of answers obtained in the tests with numbers that can be expected assuming that there is no relationship between analysed variables. The basic values calculated in this test are: chi^2, degree of freedom (df) and level of statistical significance (alpha). The 'alpha' value, which determines the probability of obtaining a specific effect in the sample if this effect is not present in the population, is of elemental significance [Blalock 1987]. This indicator is applied to evaluate whether the obtained result is statistically

Tab. 4. Structure of the gender and age of the respondents

No.	Age group	Women		Men		Total	
		No. of individuals	%	No. of individuals	%	No. of individuals	%
1.	15-19	45	3.47	48	3.72	93	7.19
2.	20-24	43	3.35	45	3.50	88	6.85
3.	25-29	46	3.55	47	3.63	93	7.18
4.	30-39	100	7.71	101	7.73	201	15.44
5.	40-49	98	7.58	95	7.39	193	14.97
6.	50-60	72	5.51	68	5.20	140	10.71
7.	Over 60	120	9.20	86	6.61	206	15.81
Total:	524	40.37	490	37.78	1,014	78.15	

Source: Author's own compilation.

significant. In the presented paper, it was assumed – as in most studies in this field – that a statistically significant result is one for which the 'alpha' value is less than 0.05. Cramér's V has also been used to examine the strength of the relationship. It is used if we have at least one nominal variable [Sojka 2003].

Factors determining the tourist activity and choice of tourist destination by the Chicago Polonia

While examining the characteristics influencing tourist activity and the choice of tourist destinations by the Chicago Polonia, respondents have been asked to choose three various factors from the pool which they regard as the most important ones[1]. Each of the respondents has indicated the three most important – depending on the person - factors determining the tourist activity of respondents and the choice of tourist destination. After receiving the results, rankings were assigned to individual factors. First place in all six age groups belonged to the following factors: price and cost of departure. These answers constituted as much as 48.2% of the responses for 1,014 respondents. Second place among the answers regarded development of tourism, which was indicated by 34.8% of respondents. Fashion (31.2%

[1] The author uses the word 'factor' in this place as a synonym for feature as she used the word 'factor' and not 'feature' in the survey questionnaire for respondents' clarity and better understanding.

of respondents) was the third most important factor influencing tourist activity and the choice of tourist destinations according to respondents. Further places were: tourist attractions at a specific place (28.9%), travel time (27%), conditions for practising different sports (active tourism, e.g. skiing, swimming, sailing, bird, whale and dolphin watching – 26.8% of the responses, the climate, weather, exotic space (understood as an area with a different climate, a different civilization as compared to the conditions of daily life), in the tourism reception area chosen by the respondents (20.1% of the responses), the sense of security in a specific place (19.7% of the responses), friends' recommendation of the place for relaxation (12.3% of the responses), tourist values (unspoilt nature, silence, peace) – 10.8% of the responses. The respondents included the following factors in further places: cultural offer at a specific place (10.5% of the responses), friendliness

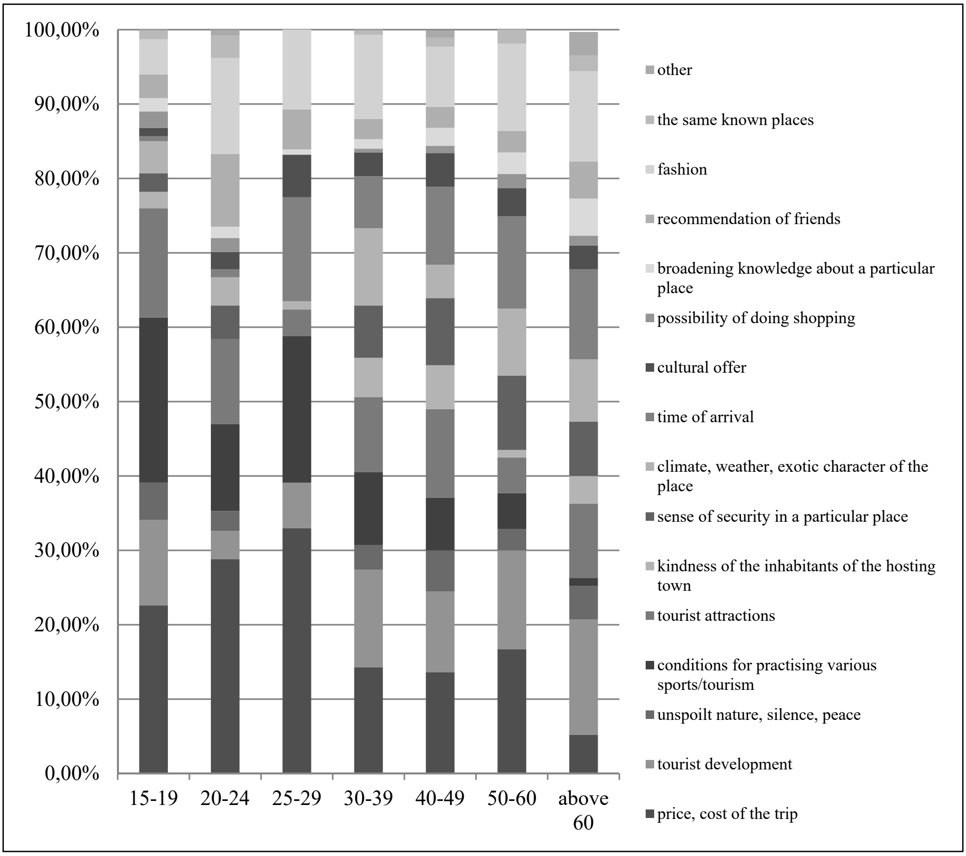

Fig. 2. Factors determining the tourist activity and choice of tourist destination by the Chicago Polonia.

Source: Author's own compilation on the basis of conducted research.

of inhabitants of the specific region (9.8% of the people), desire to broaden knowledge regarding the place of their choice (7.5% of the responses). 4.2% of respondents informed me that they choose the same holiday place every year. The smallest number of respondents answered that shopping (3.6% of the responses) is one of three factors - in their opinion - determining their tourist activity and choice of destination. Here, the author does not characterize the answers in specific age groups. Accurate analysis of the indicators influencing tourist activity and the choice of tourist destination will be discussed while describing the particular factors. The distribution of answers to this question is presented in Fig. 2.

There are also a number of barriers that hinder tourism or even make it impossible for respondents. The term ‘tourist activity inhibitor’ is used in this work as a factor inhibiting the process of formation and undertaking tourist activity leading to a lack of travel at a specific time (however, it does not exclude undertaking tourist activity in the future). The topic of tourist activity inhibitors is rarely discussed in the subject literature [Haukeland 1990]. Among the native researchers, works by W. Alejziak significantly contribute to development of science within this scope [2007, 2009, 2011]. There are also studies outlining the limitations of recreational activity and valuable use of free time in general, e.g. M. Bytniewski and E. Huk-Wieliczuk [2005]. The respondents have been able to choose one (in their opinion the most important) out of the seven factors that inhibits and prevents

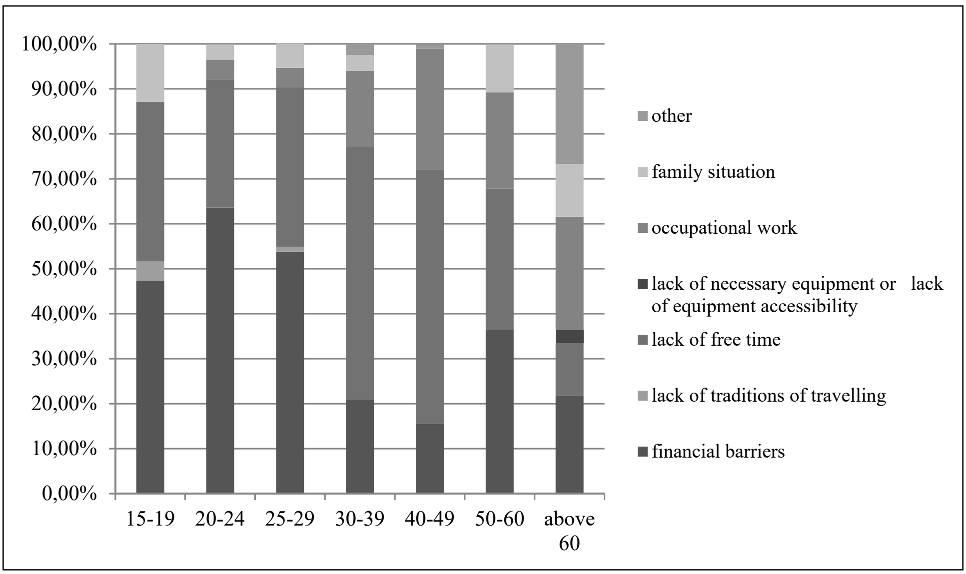

Fig. 3. Inhibitors of activity and tourist destination (%).

Source: Author’s own compilation on the basis of conducted research.

them from undertaking tourist activity. The lack of free time (37.6%) constituted the largest barrier in opinion of respondents, regardless of age. The second barrier – taking into account the number of cast votes – is the financial barrier (31.4%) and the third one is occupational work (17.4%). Lack of travelling tradition (0.5%) and lack of necessary tourist equipment, or a lack of equipment accessibility (0.6%) are chosen by a marginal percentage of respondents. Fig. 3. presents answers to this question.

In order to check the determinants of activity and tourist destinations influencing each other, several research hypotheses aimed at presenting the legal, social and economic situation of the Chicago Polonia have been posed. These were, among others, hypotheses concerning the size of the household. One of the hypotheses stated that:

- The size of the household of the Chicago Polonia influences the frequency of the their tourist trips, duration of the trip, travel expenses and the choice of tourist destination.

Due to the very extensive nature of the research material, only one of the demographic factors, i.e. the size of the household of the examined group of respondents will be presented and only one of the posed research hypotheses stating that the size of the household has significant influence on the frequency of the trips will be discussed.

Demographic factors can be considered with the application of a macro- and micro-scale. Despite the considerable importance of macro-demographic determinants, e.g. population density, the analyses conducted with refer-

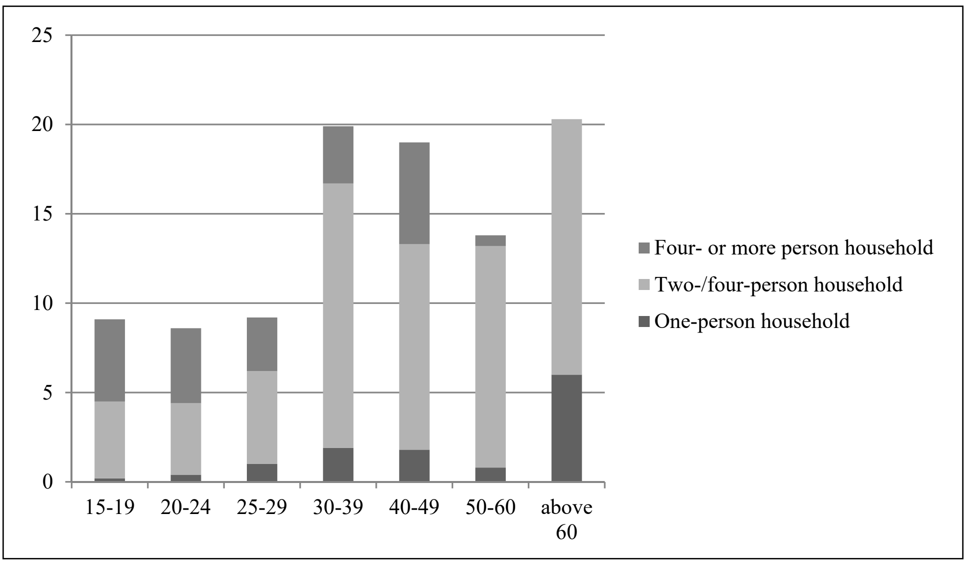

Fig. 4. The size of the respondents' household of the respondents (%).

Source: Author's own compilation on the basis of conducted research.

ence to people and households, i.e. in the micro-scale are more important in the research regarding tourist activity [Alejziak 2009]. Their aim is to determine the relationship between demographic characteristics, such as: age, gender, size of the household and tourist activity. The number of members in the household undoubtedly influences tourist activity and the choice of tourist destinations.

One question in the measurments regarded the size of the household. In the 25+ age group, the dominant answer was a household of 2-4 people. In the 60+ age group, there was no response indicating that older people formed a household of more than 4 people. These responses appeared mainly in the age group of 15-19 (50.5% of the respondents) and 20-24 (48.9% of the respondents).

One of the posed research hypotheses stated that the size of the household has significant impact on the frequency of trips. The erected hypothesis confirms that people who form a one-person household are more likely to travel than people forming larger households. Table 5 presents statistical calculations for this hypothesis.

Tab. 5. The size of the household and frequency of trips.

The size of the household	**Frequency of trips**				**Total**
	once a year	**2-4**	**5-8**	**more than 8**	
one-person	50	65	5	3	**123**
2-4 people	239	349	45	32	**665**
more than 4	76	115	20	15	**226**
Total	**365**	**529**	**70**	**50**	**1014**
Degree of freedom	**df=6**				
λ2	**6.78**				
λ2alfa	**12.59**				

Source: Author's own calculations.

The value of the statistics equals: $\lambda 2=6.78$. The critical chi-square value totals: $\lambda 2alfa=12.59$. At the level of significance, $alpha=0.05$ $\lambda 2$ alpha > $\lambda 2$, i.e. a lack of basis for rejection of the null hypothesis, thus we can say that there is no correlation between the size of the household and frequency of the trips. Consequently, the posed hypothesis is false and, as a result, people forming single-person household do not travel more often than people who run multi-person households.

Conclusions

The issue of tourist activity occupies an important place in studies aiming at getting to know the laws and mechanisms governing the tourist market, conducted by representatives of various disciplines. This is because it is a tourist who constitutes the basic entity of tourism. Tourism cannot exist without man since this is an individual who deliberately signals a need related to managing free time, whose result is the pursuit of tourism activity. A powerful tourist industry has been created for tourists and it tries to meet the tourist's needs and expectations. On the other hand, the aim of the science is to support this activity by examining various aspects of functioning of this industry. All this makes the study of recreational patterns of the US residents and Poles living there and their tourist activity very important not only for theorists but also for people who deal with tourism organization on a daily basis.

Referring to the current geographic research concerning the activity and destinations of the Polonia living in the Great Metropolis of Chicago, the author has made an attempt to conduct complex analysis of the most important determinants of tourist activity and destinations of the Chicago Polonia. She has endeavoured to discuss – in her opinion – a new issue in the field of social geography. The research conducted by the author confirms that tourism plays a significant role among the Chicago Polonia and they constitute an active social group taking tourism into account.

The main purpose of research was to determine the level of activity and the tourist destinations of the Chicago Polonia. Determination of the factors conditioning the choice of tourist destinations and description of the determinants of activity and tourist destinations influencing each other as well as formation of the author's own model of internal and external determinants of the activity and tourist destination have constituted the major specific objectives of research. The author - knowing the specificity of Polonia representatives living in the Great Metropolis of Chicago - has taken into consideration the number of factors influencing each other and having an impact on activity and tourist destination of the Chicago Polonia. Legal, political, geographical factors and organization of tourism have been distinguished in the group of external factors. According to the author, all of the above-mentioned factors influence both activity and the choice of tourist destinations of the Chicago Polonia.

Responding to the posed research hypothesis, it can be said that people who form a one-person household do not travel more often than individuals forming multi-person households. Consequently, the size of the Chicago Polonia household does not have impact on the frequency of travelling. The conducted research also confirms that in all age groups the factors influencing tourist activity of the respondents and the choice of tourist destinations consider: price, cost of travelling, tourist development and fashion of the local community. The lack of free time (37.6%), financial barriers (31.4%) and occupational work (17.4%) constitute the largest barriers for the Chicago Polonia.

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UWARUNKOWANIA AKTYWNOŚCI I DESTYNACJI TURYSTYCZNYCH POLONII CHICAGOWSKIEJ W ŚWIETLE LITERATURY I BADAŃ

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Abstrakt

Cel. Ukazanie aktywności i wyboru destynacji turystycznych chicagowskiej Polonii. Omówienie determinantów aktywności turystycznych w świetle literatury oraz stworzenie własnego modelu aktywności i destynacji turystycznej dla ogółu amerykańskiej populacji.
Metoda. Desk research – studia literatury zagranicznej i polskiej. Badania empiryczne dotyczące aktywności turystycznej i wybory destynacji przez chicagowską Polonię, w postaci kwestionariusza ankietowego. Grupa badawcza 1014 osób, podzielona na 7 podgrup wiekowych. Zastosowane metody i techniki statystyczne: chi^2, stopień swobody (df) oraz poziom istotności statystycznej (alfa).
Wyniki. We wszystkich grupach wiekowych czynnikami, które decydują o aktywności turystycznej respondentów oraz o wyborze destynacji turystycznej są cena, koszt wyjazdu, na drugim miejscu zagospodarowanie turystyczne, a na trzecim moda. Największą barierą dla chicagowskiej Polonii w podejmowaniu aktywności turystycznej jest brak wolnego czasu (37,6%), bariera finansowa (31,4%) oraz praca zawodowa (17,4%). Osoby, które tworzą gospodarstwo jednoosobowe nie podróżują częściej od osób, które tworzą gospodarstwa wieloosobowe.
Ograniczenia badań i wnioskowania. Badania empiryczne dotyczyły tylko Polonii zamieszkującej Wielką Metropolię Chicagowską, a nie całej populacji amerykańskiej Polonii.
Implikacje praktyczne. Badania ukazują poziom i charakter uczestnictwa w turystyce chicagowskiej Polonii oraz charakterystyka siedmiu czynników, które wzajemnie na siebie oddziaływają oraz wpływają na aktywność oraz destynację turystyczną Polonii chicagowskiej.
Oryginalność. Duża grupa badawcza. Utworzenie własnego modelu aktywności turystycznej, w którym uwzględnione są czynniki wewnętrzne (czynniki demograficzne, społeczne, kulturowe, ekonomiczne) oraz czynniki zewnętrze (czynniki geograficzne, czynniki polityczno-prawne oraz organizacja turystyki)
Rodzaj pracy. Artykuł prezentujący wyniki badań empirycznych oraz ma charakter przeglądowy znanych w literaturze przedmiotu modeli aktywności turystycznych.

Słowa kluczowe: aktywność turystyczna, bariery w podejmowaniu turystyki, Polonia, Chicago, model aktywności turystycznej, destynacja turystyczna.

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RECREATIONAL FOREST MANAGEMENT FOR DISABLED PEOPLE IN URBAN FORESTS – THE CURRENT STATE AND PERSPECTIVES. A CASE STUDY OF POZNAŃ

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Abstract

Purpose. The aim of this paper is a review of literature on forest environment adaptation in the cities to the needs of elderly and disabled people. The detailed objectives are to present the current state of recreational development in the urban forests of Poznań, with reference of this state to the demographic perspective for the city.
Method. A review of literature and city documents was conducted.
Findings. Preparation of forest management development for the elderly or disabled might be one of the key problems of forest management in urban forests. Poznań, despite having a 5 km long path for disabled people disabled individuals within one complex of urban forests, its potential is much greater, taking into account 84 km of roads as well as paths, and a total area of over 2,500 ha.
Research conclusions and limitations. It is difficult to decide how many people with different types of disabilities visit forests (urban, suburban, State forests) and what the perspectives in the share of forest visitors and their preferences are.
Practical implications. The paper emphasizes the need to adjust the forest to the disabled. It may influence some future projects.
Originality. The paper joins the review of world literature with the perspectives of demographics of the presented city.
Type of paper. An empirical paper.
Key words: recreational forest management, urban forests, disabled people, demographic projections.

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Introduction

The adaptation of urban forests to the needs of the population in terms of recreation requires examination of preferences of society. An important group of users are people with disabilities. The aim of the paper is to highlight the essence of recreational development within the area of urban forests. The paper presents the current state of recreation development and describes the project regarding the Nordic Walking path created in one of the Poznań municipal forest complexes. Based on the analysis of literature and the Demographic Perspectives of the city of Poznań elaborated by GUS [2011], it was concluded that the adaptation of recreational infrastructure to the needs of the residents will require taking into account the particular needs of the elderly and people with disabilities.

Literature review

Recreation in forest areas is particularly popular for populations in highly urbanized areas [Kandafer 2004]. Its attractiveness allows us to escape from everyday life and hustle of civilization. Bio values of forest areas mainly include clean and enriched air with negative ions, beneficial for the body . The practice of different forms of leisure and recreation in forests give the opportunity of direct, extremely valuable contact with nature. Moreover, the attractiveness of the forest landscape is determined by e.g. the stand composition, the age of stands and the manner of maintaining the shoreline along the paths and clearings.

Research by T. Tyrväinen et al. [2003, p. 135-149] showed that the majority of the population benefiting from forest areas prefer them to have recreational facilities. The least popular are stands with a high share of understory and fragments of forests with a limited field of vision and weak accessibility.

According to R.W. Smith [1987], the factors limiting tourist and recreational activity of people with different disabilities are as follows: real, environmental, interactive. While M. Daniels et al. [2005] draw attention to other groups of factors such as those intrapersonal, interpersonal and structural. Similar factors were recognized by N.J. Gladwell and N.A. Bedini [2004], who also established the following three groups: physical, social and emotional. The research of the above-mentioned authors considered recreation and tourism in general. A. Zajadacz [2012] has elaborated in a comprehensive study of tourism in geographical terms among deaf people. The tourism of deaf individuals in Polish national parks was the aim of research by M. Kossewska and B. Fornal-Pieniak [2009]. Preferences and expectations of the disabled with regard to recreational forest management were the object of research for M. Woźnicka [2008a, p. 172-178; 2008b, p. 123-131; 2010, p. 183-189] and W. Nowacka [2010, p. 30-39]. Some aspects of the adaptation of the State Forests to the needs of people with different disabilities have been described by W. Kacprzyk [2013], commissioned by The State Forests "National Forest Holding". W. Kacprzyk [2013] presents some important instructions concerning preparation of routes, such as the route course, the height and width of the corridors, the slope, the type of pavement, the way of organizing places for overtaking. It is recommended that the height of the corridor routes should always be 220 cm, while its width should be a minimum of 90 cm, however, when the path is dedicated to more intensive exploration, it should be 150 cm wide [Kacprzyk 2013, p. 19]. The results of research conducted by E. Janeczko et. al. [2016, p. 116-122] showed that the majority of the group of people with disabilities in wheelchairs from Poland (about 71.2%) and Slovakia (a total of 61.4% of responses) indicated that the length of trails in the forest should not exceed 4 km. Despite the existence of some technical regulations, research by Hemka [2010, p.139-148] showed that although the vast majority of the recreational forest objects within the Wzniesienia Łódzkie Landscape Park are in very good condition, they have not been adapted to the needs of the handicapped. Also, M. Woźnicka [2007] showed that in general, 40% of the total length of roads in the forests of the city of Warsaw is available for people in wheelchairs. The reason of such an unsatisfactory share seems to stem from the poor technical conditions of the surface of the road and too large vertical drops [Woźnicka 2009].

In the case of preparing path surface, it is recommended that it be hard and stable [Kacprzyk 2013, p. 27]. Different the types of surfaces such as natural, hardened gravel, asphalt, made from wood (wooden bridge), pavement from concrete slabs, were evaluated in terms of usability for people with disabilities in wheelchairs using a four-point scale (unnecessary, rarely needed, rather necessary, required) by E. Janeczko et al. [2016, p. 116-122]. Research conducted in Poland showed that surfaces such as concrete slabs, asphalt and paving stones were considered to be most suitable for people in wheelchairs (high percentage of respondents (90.4%, 96.2% and 59.6%, respectively) recognised the surface as easy and very easy to use. Similarly to Poland's results of research, in Slovakia and the Czech Republic, the vast majority of respondents also pointed to the great usefulness of asphalt (94.7% and 90.9%, respectively). The views of respondents in the Czech Republic and Slovakia on the high usefulness of the surface of the concrete slabs and cobblestone were not as strong as those in the case of Polish respondents. The vast majority of respondents in the Czech Republic and Slovakia (36.4% and 45.6%, respectively) indicated that the surface of the concrete slab is moderately friendly to wheelchair users. In turn, pavement has been assessed by the majority of respondents from the Czech Republic (50%) as a surface unsuitable for wheelchairs. The majority of Slovaks (43.9%) considered this surface as moderately useful [Janeczko et. al. 2016, p. 116-122].

On the basis of Art. 15 paragraph 7 point a) of the Forest Act, forests located within the administrative boundaries of cities and only 10 km from the administrative borders of cities with more than 50 thousand people are considered to be protective forests. Therefore, in urban forests, the productive functions are of secondary importance. These forests fulfil primarily non-productive functions, e.g. air filtration, they have an influence on climate and landscape, recreation and leisure services. The needs for physical exercises and leisure are general for everyone but too often, people with some form of disability are locked out from the forests because of technical obstacles or due to lack of knowledge [Lundell 2005]. The specificity of forests in urban areas is shaped in the consciousness of the society that their aim is conducting management focused on the recreational needs of residents [Ważyński 2007]. Another characteristic feature is the fact that they are considerably fragmented and situated within close vicinity of residential, built-up areas [Jaszczak, Wajchman 2014].

The most popular forms of recreation in forest areas are hiking, cycling, horse riding, picking non-productive forest products (berries, fruits, herbs, mushrooms), campfires and observation of nature. Each of these forms depend on the one's personal preferences and prospective limitations which may be conditioned by disability. One of the most preferred elements of recreational forest management for people with and without disabilities is considered to be walking paths [Janeczko 2002]. Y. Lundell [2005] stated that disabled people share the same need for revitalisation through woodland and outdoor spaces as their non-disabled peers, yet, they can be "locked out" of woodland areas. However, it is often impossible for them to access "natural", green areas. The most important obstacles were considered as: lack of information, accessibility of sites, facilities available at the sites, financial costs, transport attitudinal barriers [Countryside Agency 2005].

Research confirms that human health is positively affected by time spent in green recreational areas [Wolski 1979; Ottosson and Grahn 1998; Łobżewicz 2000, Hartig et al. 2003, p. 109-123; Pretty 2005, p. 21-48; Mass et al. 2006, p. 587-592, Björk et al. 2008, Karjalainen et al. 2010, p. 1-8; Carrus et al. 2015, p. 221-228]. The recreation of people with disabilities prevents social exclusion and helps to return to proper functioning in a social group. The positive impact of recreation to recover lost efficiency is possible by properly adaptation of space, devoid of architectural barriers. Open access to forests is seen as vital to people's quality of life, hence, the time spent in a 'natural' environment may be a tonic to one's physical and mental well-being [Duncan 2005]. In recent times, the growing popularity of outdoor activities can be noticed and often regarded as therapeutic via the concept of 'ecotherapy' [Mind 2007] and 'greengyms'.

Results

On a national scale, the number of people with disabilities confirmed by the law in 2011, amounted to 3,131/9 and decreased by almost 30% compared to 2002. It was a result of changes in legislation and stricter rules for granting disability pensions and other benefits. It is noteworthy that the number of biologically disabled people, e.g. those who do not have official disability certificates but their subjective evaluation indicated that felt entirely or significantly limited to perform basic activities increased considerably in relation to 2002 [The National Census 2011] [Jaworska 2013, p. 27-29]. People with dis-

Tab. 1. Number of disabled people in Poznań

Region	Population in total	Disabled people	Share of disabled people in population
Poland	38 230 080	5 456 711	14,30%
Wielkopolska	3 351 915	525 101	15,70%
Poznań	578 886	92 980	16,10%

Source: Own elaboration based on the National Census (2002) and data from the City Hall of Poznań.

Tab. 2. Type of disability by gender and age among disabled residents of Poznań on the basis of The National Census 2002. (a-aged 16 and over, b-aged 0-15)

Social group and type of disability	Social group		
	Total	Men	Women
Total	92 980	40 676	52 304
legally	79 620	35 893	43 727
biologically	13 360	4 783	8 577
Adults (a)	90 239	39 149	51 090
legally	77 882	34 930	42 952
biologically	12 357	4 219	8 138
Children (b)	2 741	1 527	1 214
legally	1 738	963	775
biologically	1 003	564	439

Source: Own elaboration based on data from the City Hall of Poznań.

abilities in Poznań comprise 16.1% of the total city population [Table 1]. The National Vocational Rehabilitation and Employment of People with Disabilities Act [27th August 1997] defines disability as a permanent or temporary inability to perform social roles due to a permanent or long-term violation of the efficiency of the body, in particular resulting in an inability to work. The differentiation in degree and type of disability [Table 2] determines the different needs and opportunities for practicing recreation.

The total area of urban forests of Poznań exceeds 2,463 ha and they are divided into four forest ranges: Antoninek, Marcelin, Strzeszynek and Zielinec. Almost all forest ranges are surrounded by housing estates. It has been noticed that spots intended for physical activities of senior citizens are rapidly gaining in popularity, especially close to urban residential areas. Within the total area, 85 km of roads and recreational trails have a hard surface (ecological Lime macadam). Maintaining the roads in a satisfactory condition requires considerable funding. The reason for surface treatment of forest paths is, on the one hand, to enable citizens' activity in appropriate areas of the forest, and on the other – to facilitate the movement of cyclists, walkers with baby carriages, elderly and disabled people (wheelchair users).

Tab. 3. Recreational development of the urban forests in Poznań (State as of 2013).

Type	Amount
playgrounds	4
forest glades	34
sledge slopes	1
rain protecting facilities	19
viewpoints	4
places for bonfire	7
roads and paths	84 km
horse riding paths	15 km
benches	324
tables	44
nature trails	5
routes for research and education	4.4 km
playgrounds for seniors (over 55 years old)	1
Nordic Walking path for disabled	1

Source: Forest management plan for the Municipal Forests of the city of Poznań from 1.01.2013 to 31.12.2022. General description. p.136).

A Nordic Walking path for the blind is therefore an ideal, but not the only example of adaptation of urban forests to the needs of recreation for people with disabilities. The current state of recreational development of urban forests in Poznań is presented in Table 3.

The Nordic Walking Path was created in 2013 according to the initiative of the Association of the Blind Together On Route. It is located in the urban forests nearby Malta Lake; the 5-km-long path begins and ends by Olszak pond. The Poznań City Forest Enterprise placed a map of the route and the trail marks on notice boards. Forest tending was aimed to reduce the amount of places difficult to reach. The aim of the information boards is to warn all people using the trail about the need for caution, since they may encounter blind or visually impaired users. The character of the path promotes the integration of people with disabilities and excludes the stigmatization or sense of isolation of people with disabilities. The widely available pathway promotes tourism, where the disability is not a limitation and the reason for delimitation a separate route.

Disabled users of recreational infrastructure in forest areas may often face many obstacles in relation to their activity. The most common group of disabled users of forests are people with dysfunction of the locomotive organs, those disabled due to age, blind or visually impaired, deaf and hard of hearing and people with mental disabilities. The obstacles for these users may be difficulties e.g. with understanding description of routes and paths, in communication and weaker sense of direction. Adaptation of routes and recreational facilities requires not only taking into account the needs of each of its users, but also providing a maximal opportunity to experience the closeness of nature.

The proposal from the Association of the Blind Together On Route to create a Nordic Walking path is excellent for recreation, which has been examined in the case of health aspects. The main advantage of Nordic Walking is the lack of age restrictions for its practice and the relatively low costs of equipment, which are limited to the purchase of poles. Nordic Walking gains an edge over jogging because it involves one's upper body and shoulders. Furthermore, during its practice, 90% of muscles of the body is involved in the work and the greatest effort falls on the muscles of the neck, shoulders and arms [Pytakov et al. 2011, p.12 19]. The practice of Nordic Walking also unequivocally affects improvement in quality of life. Research by K. Prusik et al. [2010, p.115 117] concerned three standardized questionnaires assessing level of: optimism (Life Orientation Test Revised LOT R), satisfaction (The Satisfaction with Life Scale SWLS) and depression (Beck Depression Inventory BDI). These parameters were related to the subjective assessment of quality of life and the Borg scale which presents the subjective assessment of the intensity of exercise. The study involved an experimental and control group of people aged 60 70 years, and so those who may have disabilities resulting from age. The study found training every six months, amounting to 72 hours, to be assessed by seniors as lightweight. Furthermore, statistical analysis has shown that the quality of life of people in the experimental group who took up systematic training is higher than those from the control group who did not perform any physical activity. Conclusions from the study allow to state that activity in the form of Nordic Walking affects quality of life, which consists of satisfaction level, optimism and depression. Advantageous changes are induced by the weekly frequency of training (3x60 minutes) during a period of six months.

Such findings are particularly important for current demographic forecasts. The group of elder people, in addition to those with disabilities, is a significant group and growing share of forest visitors. Recreational forest management should take this trend into account and design according to the needs of this group.

In Poznań, "Directions of activities and tasks of the City of Poznań for the social integration of people with disabilities for the years 2012 2020" were elaborated and this document fits its objectives and tasks in the "Strategy for Development of the City of Poznań to 2030". The strategic objective established in the document is normalization of the living environment of people with disabilities and creation of conditions for the integration and active participation of disabled residents of the city of Poznań in social life. One of the four directions (detailed objectives) is to encourage and support various forms of participation and social activity among people with disabilities. As part of this direction, there are activities designed to encourage people with disabilities to participate in sport, tourism and recreation. The following actions are proposed:

- to support and organize sports and tourism events with the participation of disabled individuals,
- to establish a scholarship fund for athletes with disabilities living in Poznań,
- to support preparation for participation in Paralympic Games and other Special Olympics,
- to finance activities of entities organizing permanent sports activities for the disabled,
- to extend playgrounds and places for recreation accessible to people with disabilities, taking the specificities of each type of disability into account.

The units responsible for the implementation of above activities are the Department of Sport, Department of Education and the Management Board of Municipal Greenery.

The demographic projections developed by the Central Statistical Office [2011] for the city of Poznan up to 2035 state that the largest decrease will occur in a group of working-age population (by 68,900 people, that is 19%).

There will also be a reduction in the amount of population at a pre-working age (by 13,300people, that is 16%), while the number of older people will increase. The population over the age of 65 will increase by 32%, including residents over 85 by 87%.

These estimates constitute the basis for directions of forward planning and the development of the recreational function, among others, in the discussed urban forests. However, Y. Lundell [2005] stated that it is difficult to decide how many people with different types of disabilities visit forests (urban, suburban, State forests) because it is often unknown how the calculations have been made. The reason for that is, for example, the fact that it is not clear whether the estimates are based on level of disability or level of functional reduction – something regarded as a slight mobility impairment in one context may be moderate in another, and two people with the same medical diagnosis need not have the same experience of their limitations. Another obstacle may be the financial aspects and sometimes ownership relations.

Conclusions

Preparation of forest management development for people both with and without disabilities may be one of the key problems of forest management in urban forests. The Nordic Walking path in the urban forest of Poznań provides an opportunity for joint participation in recreation for people with disabilities and those who are non-disabled. The choice of the Nordic Walking discipline for people with disabilities as well as for the elderly is an opportunity to increase their level of satisfaction and optimism, and thus, reduce the level of depression, as indicated in the research by K. Prusik et al. [2010]. On the other hand, urban forests in Poznań have a much greater potential for use than the currently functioning 5-km-long path for the disabled. The demographic projections of the Central Statistical Office [2011] for the city of Poznań suggest that the adaptation of leisure facilities to the needs of residents will require taking the particular needs of elderly people and those with disabilities into account.

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ZAGOSPODAROWANIE REKREACYJNE LASU DLA OSÓB NIEPEŁNOSPRAWNYCH W LASACH MIEJSKICH – STAN OBECNY I PERSPEKTYWY. STUDIUM PRZYPADKU POZNANIA

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Abstrakt

Cel. Celem ogólnym pracy jest przegląd literatury traktującej o dostosowaniu środowiska leśnego do potrzeb osób starszych lub niepełnosprawnych. Kolejny cel stanowi prezentacja aktualnego stanu zagospodarowania lasów komunalnych w Poznaniu w połączeniu z danymi dotyczącymi perspektywy demograficznej miasta Poznań.
Metoda. Przegląd literatury.
Wyniki. Przygotowanie zagospodarowania rekreacyjnego lasu dla potrzeb osób starszych i niepełnosprawnych może stanowić jeden z kluczowych problemów w gospodarowaniu obszarem lasów w miastach. Na tle całego obiektu lasów miejskich Poznania, którego powierzchnia wynosi ponad 2500 ha a długość dróg i ścieżek to 84 km, można stwierdzić, że istniejąca 5 kilometrowa ścieżka Nordic Walking dla niepełnosprawnych pokazuje niewykorzystany potencjał tego obszaru.
Ograniczenia badań i wnioskowania. Istnieje trudność w określeniu ile osób niepełnosprawnych odwiedza lasy (zarówno lasy miejskie jak i lasy Skarbu Państwa) i jakie są ich preferencje co do zagospodarowania rekreacyjnego.
Implikacje praktyczne. Artykuł podkreśla zasadność dostosowania zagospodarowania rekreacyjnego lasu do potrzeb osób niepełnosprawnych. Może to wpłynąć na przyszłe projekty w zakresie zagospodarowania rekreacyjnego tych obszarów.
Oryginalność pracy. Artykuł łączy przegląd literatury na wskazany temat wraz z prognozą demograficzną prezentowanego miasta.
Rodzaj pracy. Artykuł prezentuje wyniki badań empirycznych.
Słowa kluczowe: rekreacyjne zagospodarowanie lasu, lasy miejskie, niepełnosprawni, prognoza demograficzna.

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STATUS AND DEVELOPMENT TRENDS OF AGRITOURISM IN POLAND AND THE UKRAINE

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Abstract

Purpose. The aim of the article is to present the state and prospects of development of rural tourism in Poland and the Ukraine.
Method. The analysis included data taken from the Ministry of Agriculture and Rural Development, the Central Statistical Office, the Institute of Tourism as well as domestic and foreign literature.
Findings. In 1993, there were around one thousand agritourism farms in Poland, while in 2012, their number increased to 7.6 thousand which represents 0.5% of the total number of agritourism farms in Poland. Country dwellers are increasingly interested in economic activities within the range of rural tourism and propose offers suiting the diverse needs of tourists. At the same time, tourists are deeply interested in spending their free time in the countryside.
Research limitations and conclusions. As research studies of many authors show, tourists value the charms of the countryside, i.e. peace, tranquillity and possibilities to make social relationships. However, they expect high-quality services and infrastructure as well as a rich offer of free time animation. Ukraine has great potential for multifunctional rural development and the development of agritourism.
Practical implications. Presentation of the most important directions of development regarding rural tourism in Poland and the Ukraine.
Originality. The article presents status and developmental trends of agritourism in Poland and the Ukraine.
Type of paper. Research article.
Keywords: tourism, agritourism, development, Poland, the Ukraine.

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Introduction

Farm tourism has a long tradition. In its initial phase of development, it was considered a great holiday place for the wealthiest classes. Trips and stays in rural areas were known amongst European aristocracy. Horseback riding, fishing, hunting and tasting good country cuisine were signs of good behaviour. What is more, having a summer-residence located in rural areas was proof of the owner's high-class. The tradition of holiday stays in the countryside goes back to the early 19th century. In the past, such stays were mainly visits to the residences of family and friends residences in rural areas, as well as "resorts", which were attended by wealthy urban dwellers, mainly the intelligence. At present, farm tourism, as an organized and legally sanctioned tourism form, has started to take on more commercialized forms. This includes renting holiday homes, organizing meals and providing a variety of related services. In such a form, agritourism allows farm families to obtain an additional source of income, which is especially important in the current difficult situation of Polish agriculture. Moreover, it creates new opportunities for development of rural spaces, agricultural buildings and local infrastructure.

The current status of farm tourism in Poland is significantly different from the level of its development in other Western European countries, although there has been a significant increase in the number of farms providing services in this field in recent years. In 1993, there were around 1 thousand agritourism farms in Poland [Data 2005], when in 2012 their number increased to 7.6 thousand [Agriculture 2013], which represents only 0.5% of the total number of agritourism farms in Poland [as in 2014] (for comparison – in Great Britain – 10.0%, in Austria – 8.0%).

Aim, material and research methods

The aim of the article is to present state and development prospects of rural tourism in Poland and the Ukraine. Analysis included data taken from the Ministry of Agriculture and Rural Development, the Central Statistical Office, the Institute of Tourism as well as domestic and foreign literature.

Rural tourism and agritourism in literature

Tourism is a complex phenomenon. It can be assessed with respect to many aspects of human life [Marques 2006]. Thanks to it, people get to know the world, regenerate and can shape their personality [McGehee 2007]. Tourism is also an economic activity, which consists in providing tourist services.

For travellers, tourism offers accommodation, gastronomic and transportation services [Roman 2015b]. Due to its multidimensional character, tourism is subject to research conducted by various sciences [Kurek 2011].

Farm tourism is observed in rural areas and includes, apart from farm tourism, health, forest and so-called “plot” tourism. The latter is associated with tourist enclaves (estates of holiday home plots, guest houses and second homes) which change the development of a given agricultural and agro-service area to a tourist-oriented one [Clarke 1999] [Clarke, 1999b]. However, counting them amongst tourism is problematic, as in the case of sanatoriums and health resorts which may also be located in towns classified as villages [Roman 2015a]. The essence of farm tourism is determined by the following features [Ollenburg, Buckley 2007]:

- it takes place in areas of real villages, i.e. where buildings, land use planning and activities of their dwellers are dominated by agriculture,
- it provides peace, tranquillity and unlimited contact with nature,
- it utilizes local resources (social, natural, cultural) on a rational basis,
- it is characterized by a small scale of undertaking (a small number of hotels and restaurants) so that the initial agricultural function is not dominated by tourism,
- it is based on an existing building (allows using a free housing base, adaptation of old mills, stables, barns, etc.) and labour force (surplus of labour force is well-managed).

A condition for classifying tourism as farm tourism is not the existence of a farm, while this condition is necessary for agritourism, which can be defined as follows:

- a relaxation form taking place in rural areas of agricultural nature based on an accommodation base and recreational activities associated with a given farm and its surroundings (natural, manufacturing, service) [Drzewiecki 1995],
- a tourism type which is carried out in rural areas with the use of vacant residential rooms and – after adaptation - farmers' outbuildings and the production as well as services of their respective owners [Dębniewska, Tkaczuk 1997],
- a farm tourism form associated with agriculture; the farm offers accommodation and the main tourist attraction for a potential tourist [Zaręba 2006],
- a tourism type associated with a stay at a farm; it is related to various forms of leisure and tourist services provided within the area of the farm [Sikora 1999].

According to M. Sznajder and L. Przezbórskiej [2006], there are three features that distinguish agritourism from conventional tourism:

- the possibility to meet human needs related to practical participation in the food production process, rural family life and rural societies,

- the possibility to meet human cognitive needs in the range of agricultural production and ethnography,
- the possibility to meet such emotional needs as a desire for direct contact with pets, animal and vegetable products, processed products, a desire for a rural idyll life associated with the atmosphere of peace and quiet.

Agritourism which lacks the cognitive element, eliminates a human's emotional needs, focused solely on leisure, recreation and fun is little different from a conventional tourism form [Oppermann 1996].

The term "agritourism" was introduced into our vocabulary in the early 90s of the 20^{th} century. At that time, agritourism developed intensively as a result of changes taking place not only in agriculture but also in the whole of economy. Available results of research entitle us to make the statement that country dwellers are increasingly interested in economic activities in the range of farm tourism and make custom offers adjusted to tourists' needs (e.g. organic farms, horse riding, winter and summer school programs, handicraft workshops). Moreover, tourists are deeply interested in spending their relaxation time in the countryside. As the studies of many authors has shown, tourists value the charms of the countryside i.e. peace, tranquillity and possibilities to make social relations. However, they expect high-quality services and infrastructure as well as a rich offer of free time animation. Some tourists expect that farms will provide them with the possibility to contact agriculture (crops, tillage works, animals).

Agritourism in Poland in the years 1990 – 2015

Tourist services are among the most popular types of non-agricultural activities undertaken by country dwellers. The development of farm tourism, including agritourism, is of special meaning for particular farms. It influences the increase in demand for tourist resorts, maintains folklore, forces new investments. It constitutes a form of activity that contributes to the development of entrepreneurship, competitiveness and an economic boom in rural areas. Moreover, it allows stimulating the activity of local environments and cooperation as part of joint projects. As a consequence, it has positive impact on improving the quality of life among country dwellers.

Analysis of the number of agritourism farms in Poland is difficult to conduct due to the availability and accuracy of data. The earliest research done by the Ministry of Agriculture and Rural Development shows that in Poland, in 1990, there were 590 agritourism farms, and by 1993, their number increased to 1,000. The Central Statistical Office had published data on agritourism lodgings since 1998. It differed significantly from the data collected by agricultural advisory centres. According to the CSO, in 1998,

Tab. 1. Number of agritourism farms in Poland in the years 1990–2015

Year	Agritourism farms	Accommodation	Data Source
1990	590	No data	Ministry of Agriculture and Rural Development
1993	1000	No data	Ministry of Agriculture and Rural Development
1998	608	5509	Central Statistical Office
1999	775	7172	Central Statistical Office
2000	808	8133	Central Statistical Office
2001	1073	11188	Central Statistical Office
2002	6543	53216	Institute of Tourism
2003	3323	32885	Institute of Tourism
2004	4052	40635	Institute of Tourism
2005	6550	64075	Institute of Tourism
2006	7214	70300	Institute of Tourism
2007	8790	87144	Institute of Tourism
2009	5473	57095	Central Statistical Office
2010	7692	82750	Central Statistical Office
2011	7852	82694	Central Statistical Office
2012	7644	80923	Central Statistical Office
2013	7802	No data	Central Statistical Office
2014	8016	No data	Central Statistical Office
2015	7700	No data	Central Statistical Office

Source: Own research based on data taken from the Ministry of Agriculture and Rural Development, the Central Statistical Office and the Institute of Tourism.

there were 608 facilities providing agritourism services. In subsequent years, their number increased. Data concerning the year 2001 was the last to be presented by the CSO related to the status of agritourism in Poland. At that time, there were 1,073 agritourism farms. In the years 2002-2007, research studies on the number of agritourism farms were conducted by the Institute of Tourism, which initially used the information obtained from agricultural advisory centres (in 2002) and later, until 2007, various municipal offices. According to the calculations made by the Institute of Tourism, based on the information obtained from agricultural advisory centres, in 2002, there were 6,543 operating agritourism farms in Poland. The following year, thanks to the information obtained from municipal offices, that number was stated at only 3,323. The data for 2007 was the last data published by the Institute of Tourism which no longer performs this type of research. In 2008, studies on the number of agritourism farms were not conducted. The studies were resumed by the CSO in 2009. The number of agritourism farms increased [Agricultural 2013] systematically and amounted to 7,644 in 2012.

According to data from 2013, there were 7,802 operating farm tourism facilities. The share of farms in the structure of tourist accommodation in 2012 was 7.2%, while in 2013, it increased to 8.2%. In the case of the number of beds at farm houses, they accounted for 1.9% in 2013 [Accommodation, 2013]. According to data of the Central Statistical Office in 2014, they increased the number of tourists. In the first half of 2014, this number increased by 7.6% compared to previous year (first half of 2013) [Accommodation 2013, 2014].

The location of agritourism accommodation in Poland was diverse in terms of territory. Data on this issue is presented in Table 2.

The data presented in Table 2 shows that the highest number of agritourism farms was in the following voivodeships: Lesser Poland, Subcarpathia, Warmia and Mazury, Lower Silesia and Pomerania. One of the main

Tab. 2. Agritourism farms in Poland according to voivodeships in 2012

Voivodeship	Agritourism farms	Accommodation
Lower Silesia	625	7357
Kujawy and Pomerania	255	3070
Lublin	440	3734
Lubusz	103	1041
Łódź	166	1757
Lesser Poland	1326	15964
Mazowsze	346	3445
Subcarpathia	912	7890
Opole	114	1214
Pomerania	614	6994
Silesia	384	4930
Świętokrzyskie	287	2627
Warmia-Masuria	713	6849
Greater Poland	414	4647
West Pomeranian	361	3860
Poland	7644	80923

Source: own research based on Tourism in 2012. CSO 2013.Online: www stat.gov.pl (28. 03. 2014).

reasons for this situation is the stunning attractiveness of these regions. What is more, not without significance is the fact that Subcarpathia and Warmia and Mazury are characterized by high levels of unemployment and low income rates of its residents. That is why there is an increased interest in additional sources of income such as agro-tourism services.

Agritourism farms are located in Poland in highly dispersed locations. Map 1 shows their location.

Fig. 1. Agritourism farms in Poland
Source: [Bednarek-Szczepańska 2015, p. 48].

There is considerable variation in the number of agritourism farms within the local scale. Most facilities occur in mountainous areas (southern part of Poland) and in the northern part of the country(Pomorze, Warmia and Mazury).

Changes in agritourism offers over the last 20 years and directions of development in Poland

The first offers of agritourism farms that appeared on the market 20 years ago were rather short. They mainly contained characteristics of facilities, including brief information on the family taking care of the farm the location, the farmed animals, rented rooms, catering services, i.e. on-site dining possibilities or eateries, canteens, restaurants, kitchen opening hours as well as prices and dates at which lodgings could be used. Occasionally, tourist attractions such as boat or kayak rides were offered. The range of services at its best.

In time, offers of agritourism lodgings have become richer and include all sorts of tourist attractions. Additional services and attractions offered by service providers are becoming more varied. For example, apart from providing boats, rowing boats, canoes and rafts, the following options are made available:

- joint bonfires,
- horse cart rides,
- demonstration and learning how to bake bread, regional cakes, butter, cheese, traditional methods of gobelin weaving on a loom,
- joint fishing.

Upon guests' request, service providers can also arrange meetings with folk artists, evenings with music and singing, sightseeing tours around the area, joint work on farmlands, in the yard and the apiary. Agritourism farms arrange more educational activities for children, youth, adults and schools, nurseries and people with disabilities [Bogusz and Kmita-Dziasek 2015]. Moreover, various types of workshops (e.g. artistic crafts) are organised.

In recent years, offers of agritourism lodgings have been targeting a specific group of clients. These are lovers of horse riding, sailing, hunters, anglers, artists, families with children and the elderly, mushroom pickers, cyclists, lovers of hiking and cross-country skis, people looking for quiet areas, business groups wishing to combine training sessions with relaxation time. There are farms that offer tennis courts and saunas.

The proposals of accommodation facilities have also changed in the Polish farm tourism. Nowadays, clients can find accommodation not only in conventional farms, but also in regional huts, modern rural homesteads, historic mansions and palaces, holiday homes and apartments located in the most attractive tourist regions. At present, accommodation lodgings are categorized. There are more and more buildings adapted to the needs of disabled people.

Further to the above, changes have also been made to culinary offers. Service providers offer not only usual homemade food but also regional dishes, often forgotten old-traditional meals, rural dishes and healthy home cooking using eco-products.

The success of Polish agritourism consists in its diversity and constant striving to improve the quality of services. What is more, contemporary Polish tourist farms are specialized in certain areas. Service providers recognize the huge diversity in tourists' needs and try to satisfy them.

When analysing years of demographic forecasts of tourism in Poland, a hypothesis can be formulated that by 2020 the number of visitors to rural areas will not change to a significant extent. On the contrary – the occurrence of its periodic fluctuations and a decreasing tendency in countryside tourism can be expected. Farm tourism is most likely to succeed and blossom in domestic market which will maintain its dynamics of development in the future. Basic segments of that market will focus on leisure services offered to families and the elderly as well as children and adolescents. Amongst foreign markets, the most important will be Germany and other countries interested in the western regions of Poland.

Agritourism in the Ukraine

Regional affiliates of the Union for Promotion of Rural Green Tourism Development in the Ukraine contribute to the promotion of about 3,000 estates with the total capacity of over 30 thousand people regarding the tourism market. At the same time, according to the Ministry of Infrastructure

Tab. 3. Distribution of rural tourism estates according to economic regions of the Ukraine, units

Economic region	1995	2000	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Prychornomorskyy	34	112	256	279	287	294	301	308	314	316	326	334
Carpathian	75	231	567	593	612	654	689	703	756	798	876	911
North-Western	12	35	89	101	129	148	169	187	204	238	243	238
Podilskyy	19	48	109	121	144	162	193	215	247	263	278	294
Central	14	36	87	94	98	102	108	114	118	123	126	118
Stolychnyy	12	28	69	78	83	94	99	107	114	116	118	123
North-Eastern	8	18	47	51	58	63	69	75	81	87	96	91
Prydniprovskyy	6	16	38	41	48	55	59	62	68	71	74	72
Donetskyy	3	9	16	18	20	23	25	27	31	38	42	34
Autonomous Republic of Crimea and Sevastopol	56	214	498	561	574	597	612	634	677	698	712	–

Source: The official website of the State Statistics Committee of the Ukraine (2015), “Statistic information”. Online : www.ukrstat.gov.ua (12.07.2016).

of the Ukraine, there are about 5 thousand officially registered estates that provide rural tourism services. In order to conduct a more detailed study of rural tourism peculiarities, we analysed the number of tourist enterprises within 10 economic regions of Ukraine.

Evaluation of rural tourism in the Ukraine shows that each region of the country is characterized by its special direction of development. Simultaneously, the most popular rural tourism is in traditional regions of the Carpathians and Azov Sea, where it is concentrated around 90% of rural tourist estates. The leading position belongs to the Carpathian region, which includes Ivano-Frankivsk, Zakarpattia, Lviv and Chernynivetska counties.

Tab. 4. Types of leisure activities within the rural tourism in the Carpathian economic region

No.	**Types of leisure activities**	**Months of the year**											
		1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**
1	Rafting in mountain rivers	-	-	-	-	+	+	-	-	-	-	-	-
2	Bicycle tourism	-	-	-	-	+	+	+	+	+	-	-	-
3	Mountain bike	-	-	-	-	+	+	+	+	+	-	-	-
4	Ski trips	+	+										+
5	Skiing, snowboarding	+	+	+									+
6	Hiking	-	-	-	+	+	+	+	+	+	+	-	-
7	Excursions	+	+	+	+	+	+	+	+	+	+	+	+
8	Camping	-	-	-	+	+	+	+	+	+	-	-	-
9	Picnics	-	-	-	-	+	+	+	+	+	-	-	-
10	Orienteering	-	-	-	-	+	+	+	+	+	-	-	-
11	Winter orienteering (skiing)	+	+										+
12	Mountain climbing	-	-	+	+	+	+	+	+	-	-	-	-
13	Paragliding				+	+	+	+	+	+	-		
14	Riding	+	+	+	+	+	+	+	+	+	+	+	+
15	Bird watching							+	+	+	-	-	-
16	Observation of animals	+	+	+	+	-	-	+	+	+	+	+	+
17	Gathering berries	-	-	-	-	-	+	+	-	-	-	-	-
18	Gathering mushrooms						+	+	+	+	-	-	-
19	Collection of medicinal herbs	-	-	-	-	-	+	+	-	-	-	-	-
20	Swimming pools	-	-	-	-	-	-	+	+	-	-	-	-
21	Licensed hunting									+	+	+	+
22	Fishing							+	+	+	-	-	-
23	Photo hunting	+	+	+	+	-	-	+	+	+	+	+	+

Source: [Zinko, Horishevsky, Petrishyn 2008, p. 12].

Main attractions include skiing and the opportunity to celebrate the New Year and Christmas holidays in the winter, surrounded by beautiful landscapes, fresh air, and mountain rivers in the summer.

In the Carpathian economic region, the dominating size of the rural tourism farms is from 2 to 4 rooms for guests, which can simultaneously accommodate 5-10 tourists. The main type rooms for guests are double rooms. Common features of rural tourism in the Carpathian economic region based on the possibility of combining rest in rural tourism farms with sport and ecological tourism. Tourism opportunities of the villages in the Carpathian economic region, according to season, is presented in Table 4.

If we consider the intensity and the seasonal nature of tourism in the region, we can also clearly distinguish several characteristic areas. The highest differences are in highland and foothill areas.

The most active flat terrains are visited in the summer. This is the time of holidays and vacation, recreation for children and students, as well as the "peak" of weekend recreation. At this time, the most involved bases of rural tourism are in lowland areas of the region [Zaburanna 2012]. The second maximum attendance of these areas accounted for transitional seasons: spring and autumn. Spring is due to the revival of suburban rural tourism after a work week – the revival of interest in traditional rural leisure (harvesting berries and mushrooms). However, the mountainous areas of the region have two pronounced attendance "peaks". The first falls in the winter when visitors of the Carpathian region are attracted by ski slopes, Christmas rituals, cheerful folk festivals, the true beauty of winter, which nobody can feel in cities. The second runs from the second decade of June to end of August – a period of mass holidays and mountaineering activities (walking, cycling and horse), cognitive ecotourism trips, just rest in the middle of the green Carpathian landscapes. Popular tourist services in the Carpathian economic region are related to cuisine, festivals (evenings, folk ceremonies). Health saunas with herbal teas, winter activities from skiing to sleigh rides are significantly widespread. All rural areas of the Carpathian region are popular due to gathering berries and mushrooms as well as qualified tourism (hiking, horseback riding). Each area of the Carpathian economic region has its own specialty of tourist services in rural tourism.

Summary and conclusions

1. The first offers of agritourism farms that appeared on the market 20 years ago were rather short and included accommodation and food. In time, offers of agritourism lodgings have become richer and include all sorts of tourist attractions.

2. The success of Polish agritourism consists in its diversity and the constant strive to improve the quality of services. Service providers recognize the huge diversity of tourists' needs and try to satisfy them.
3. When analysing years of demographic forecasts for tourism in Poland, a hypothesis can be formulated that by 2020, the number of visitors to rural areas will not change to a significant extent. On the contrary – the occurrence of its periodic fluctuations and a tendency to decrease in countryside tourism can be expected. Farm tourism is most likely to succeed and blossom in the domestic market which will maintain its dynamics of development in the future. Basic segments of that market will focus on leisure services offered to families and the elderly as well as children and adolescents. Amongst foreign markets, the most important will be Germany and other countries interested in the western regions of Poland.
4. The Ukraine has great potential for multifunctional rural development and the development of rural tourism. In the application of effective methods and mechanisms to encourage their development, the Ukraine can claim significant improvement in its socio-economic status.
5. At the same time, development of rural tourism in all regions of the Ukraine is complicated by several circumstances, the main one being insufficient popularization of rural tourism in the Ukraine both on domestic and foreign markets. Often, information on existing rural tourism farms does not reach the consumer due to lack of money for transmission. The second problem – imperfection of legal framework and lack of technical, organizational, informational and financial support for rural tourism farms by the state. Practical implementation of state policy in the field of support for rural tourism today, as during previous years, is mainly declarative, and state target financing of rural tourism at the national and regional levels is virtually absent.
6. The third problem is the lack of innovation and research on the development of rural tourism. Innovation and scientific support of rural tourism will promote the creation of new original tourism products, integrated use and conservation of the natural environment and cultural heritage, patriotic education, promotion of healthy lifestyles, strengthening the international authority of the Ukraine as a touristic country.

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STAN I PERSPEKTYWY ROZWOJU AGROTURYSTYKI W POLSCE I NA UKRAINIE

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Abstrakt

Cel. Celem artykułu było przedstawienie stanu i perspektyw rozwoju agroturystyki w Polsce i na Ukrainie.

Metoda. W opracowaniu uwzględniono dane statystyczne pochodzące z Ministerstwa Rolnictwa i Rozwoju Wsi, Głównego Urzędu Statystycznego, Instytutu Turystyki oraz literatury krajowej i zagranicznej.

Wyniki. W 1993 roku w Polsce istniało około tysiąca gospodarstw agroturystycznych, natomiast w 2012 roku ich liczba wzrosła do 7,6 tys., co stanowi 0,5% ogólnej liczby gospodarstw agroturystycznych w Polsce. Mieszkańcy wsi są coraz bardziej zainteresowani działalnością gospodarczą w zakresie prowadzenia gospodarstw agroturystycznych i ofertami odpowiadającymi zróżnicowanym potrzebom turystów. Jednocześnie turyści są głęboko zainteresowani spędzaniem wolnego czasu na wsi.

Ograniczenia badań i wnioskowania. Jak pokazują badania wielu autorów, turyści doceniają uroki wsi, tj. spokój, cisza, możliwości nawiązywania relacji społecznych. Jednak oczekują wysokiej jakości usług, a także bogatej oferty animacji czasu wolnego. Ukraina ma ogromny potencjał w zakresie wielofunkcyjnego rozwoju obszarów wiejskich i rozwoju agroturystyki.

Implikacje praktyczne. Prezentacja najważniejszych kierunków rozwoju agroturystyki w Polsce i na Ukrainie.

Oryginalność. W artykule przedstawiono stan i perspektyw rozwoju agroturystyki w Polsce i na Ukrainie.

Rodzaj pracy: artykuł naukowy.

Słowa kluczowe: turystyka, agroturystyka, rozwój, Polska, Ukraina.

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POSSIBILITIES AND WAYS OF USING BENCHMARKING IN HOTEL COMPANIES

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Abstract

Purpose. The aim of the work is an attempt to answer the questions of whether and how benchmarking is used in hotels with concomitant benchmarking comparisons and what are the benefits of benchmarking in hotel companies.
Method. Survey forms filled in by hotel directors were the research tool. The study involved 12 selected hotels located in Poznań and thus, 18% of all the hotels operating in the city. An analysis of the responses was conducted in hotel groups based on selected factors such as network affiliation or category. The Pearson product-moment correlation coefficient was calculated for individual responses to obtain answers to the questions of whether and how selected factors differentiate the hoteliers' approach to benchmarking.
Findings. It was found that a comparative analysis should refer to similar hotels in terms of category, ownership and regional conditions. Benchmarking is primarily used to improve current efforts of the company. An endeavour to improve competitiveness and reduce costs is also an important reason for using this method. The lack of courage and openness on the part of managers to look for patterns outside their own industry and the group of their closest competitors are surprising.
Research conclusions and limitations. The research only took into account hotels located in the city – a case study of Poznań. Although the number of surveyed hotels was sufficient for an attempt to generalize results in the city, the sample size should be significantly increased in order to make broader generalizations. It is also worth identifying other factors (beyond category and network affiliation) which differentiate the hoteliers' approach to benchmarking.
Practical implications. The study and application process which resulted in the analysis of the responses were purely practical. Amongst others, the responses concerned the course of benchmarking, experience in its implementation, or the manner of information flow on the use of best practices within the company. The questions asked included the type of benchmarking used and the effects of its application in the hotels.
Originality. In Polish literature, this kind of empirical research is not often conducted, all the more that it requires the collection of data through personal interviews with the hotel managers.
Type of paper. Review article.
Keywords: benchmarking, hotels, tourism, the use of benchmarking

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Introduction

Although benchmarking is not a new method of management, it still poses many problems of practical nature for entrepreneurs. The reason for this has to be sought in the large disparity and diversity of the tourism industry, and what goes along with few benchmarking practices of formal nature, either undertaken or reported. Not without significance for the popularity and efficiency of the method is also its erroneous identification with competition analysis, which is supported by many studies. Thus, having regard to the above reasons, the authors made an attempt, based on primary research, to enrich the existing resources of knowledge in this field by conducting research within the hospitality industry.

Benchmarking is now used in many areas of business activity, particularly in quality management [Kazançoğlu, Kazançoğlu 2013; Kozak, Rimmington 1998]. It mainly consists in learning how to improve activities of an organization, optimizing its processes and management system [Garrod, Kinnell 2009]. According to J. Prašnikar, Z. Debeljak and A. Ahcan [2005], benchmarking is a process of creating business knowledge by comparing and analysing business information about other companies with the goal of improving the quality of decision-making. From this definition, it follows that the aim of benchmarking is to use knew business knowledge in decision-making, which results in better economic performance of a company, consequently leading to competitive advantage. Specifically, the aim of benchmarking is to support and improve products (services) through identification of recognized standards and relevant actions. Knowledge gained through the process of benchmarking enables decision makers to understand and evaluate the current position of a firm or organization relative to "the best", and to define ways of improving efficiency. It is done not via imitation, but through innovation and by adapting best practices to one's needs.

Despite the widespread use of comparative analysis in quality, marketing, finance and technological innovation in the manufacturing industry, the importance of this method remains unclear in the services sector, particularly in tourism [Wöber 2001]. K. Wöber says that benchmarking enables tourism managers to better understand how comparative analysis can be used to assess the efforts of tourism organizations. It also allows an explanation as to how a particular practice can lead to improved efficiency and enhancement of organizational learning [Wöber 2001]. G.H. Watson [1993] shares a similar view and points out that benchmarking is the continuous search for and the use of much better practices that lead to higher competitive performance. He points out that benchmarking is a dynamic concept that moves from art to science. In turn, L.W. Lan, W.-W. Wuand Y.-T. Lee [2013] point out the difficulties of implementing benchmarking in the hotel industry because of the nature of hotel services (such as inability to store for future use, perishability, and heterogeneity) and its effect on the possibility of performing benchmarking analyses.

However, the method for its implementation is not only dependent on the industry but also the category and size of the company. Benchmarking activity grows in large organizations [Horwath International 1998; Pannell 1998], but wide variations occur with respect to small and medium-sized enterprises. M.J. Mickle wright [1993] believes that benchmarking may be too expensive and time-consuming for small businesses. Moreover, the research shows that it is sometimes too often confused with competitive analysis, which in some way, forms its integral part.

Amongst the wide range of services creating tourism product, growth potential of the service, capital concentration, high revenue increase and intensification of competitive pressure particularly exist in the hospitality and transport industries. The increase in the potential of the hotel base is particularly evident. In the years 1995 – 2012, the number of hotels in Poland grew at a rate of 7% per year, increasing from 668 to 2014. Similarly, the increase in the number of beds rose from 74,500 in 1995 to nearly 200,000 in 2012 [Wojdacki 2014]. The upward trend was maintained in following years. In 2014, 2,316 existing hotels offered 220,000 beds [Central Statistical Office of Poland 2015]. At the same time, the competitive struggle accelerated. The indicator potential is not high and amounts to over 51% while the profitability of hotels does not exceed 2% [Monitoring Industry PKO BP 2015]. There has been growing diversification in sales profitability of individual hotels or hotel groups. The ROS (return on sales) indicator for the top 10% of the hotels stood at + 23%, while for the lowest 10%, it amounted to-27% [Monitoring Industry PKO BP 2015]. Taking all these into account, finding the best solutions, the implementation of which implementation could help improve the competitive position, is the order of the day, especially for those hotels threatened with bankruptcy.

A proven way allowing hotels to maintain their business in a highly competitive market is the use of best practices from both direct competitors as well as those from other industries who are market leaders. Benchmarking allows managers to achieve those objectives because it is believed that benchmarking is one of the most important methods of management which allows estimation of the internal strengths and weaknesses of the company [Wöber 2002]. In other words, benchmarking helps to set trends, i.e. patterns to refine management in organizations [Harris, Mongiello 2006]. Within the context of company strengths and weaknesses and directions of future actions, strategic benchmarking is worth noting, a process whereby a company is continuously compared with the industry leader over a long period in terms of operational strategy, target markets and market segments, investment levels, rate of return and profitability, cost structure, return on capital employed, product quality, etc. [Obłój 1993]. Another objective of this comparison is identification of the strengths of the analysed company which decide about its competitive advantage. This helps to define the winning elements of the competitor's strategy that determine its strong market position, and therefore, allows comparison of different strategies used in the industry and an analysis of correlations between these elements and market success [Marković, Dutina and Kova ević 2011; Bendkowski, Bendkowski 2008]. The expected performance improvement only takes place in the long term [Bogan, English 2006].

Concerning the above statements with regard to the hospitality industry, we would like to answer three basic questions:

1. Is and how is benchmarking used in hotels?
2. What is the subject of benchmarking comparisons? What are the problems that lie in hotel operations?
3. What are the benefits of benchmarking in hotels?
   It is claimed that hotels are very diverse in terms of size, standard, location, network affiliation or the time the company has been operating on the market, etc., thus the answer to the following question is of fundamental importance:
4. Are there any factors which differentiate the approach to benchmarking in hotels? If so, what are they?
   Therefore, we hypothesize that the primary factor differentiating the utilisation of benchmarking in hotels is affiliation to a hotel chain and the hotel category.

Research methodology

Location is one of the most important factors influencing the decisions of management and the economic performance of hotels. Location in large cities, under conditions of increased competitiveness, results in better utilisation of human resources, the introduction of modern technology, marketing resources and improvement of internal resources [Gołembski, Majewska 2015]. Therefore, hotels located in Poznań were selected for the research. Poznań is a city where competition in the hotel market is particularly evident. It is proven by the rate of occupancy in hotels which amounts to slightly more than 50%.

Under these conditions, the competitive struggle in the Poznań hotel market is particularly fierce. Despite that, between 1995 – 2012, the number of hotels in this city has increased from 15 to 67, and the number of beds from 3263 to 5,616 [Wojdacki 2014].

The study involved 12 selected hotels located in Poznań, and thus, 18% of all the hotels operating in the city[1]. It is worth mentioning that these

[1] The study was conducted in 2016.

were high category hotels (3-, 4- and 5-star), amongst which 7 are 4- and 5-star hotels (41% of such facilities in the city) and 5 are 3-star hotels (18.5% of all facilities). This structure was determined in a targeted manner because the hotel category was considered a differentiating factor in benchmarking. It is not without significance that benchmarking is used mainly by higher category hotels. Similar circumstances were taken into consideration in the choice of hotels in terms of hotel affiliation – and in this case, the choice was deliberate. Half of the selected hotels belong to hotel chains, whilst the other half are managed by individual private owners.

Survey forms completed by the hotel directors acted as the research tool. In all cases, the forms were filled out in the presence of the researcher. This approach allowed the respondents to have a clear understanding of the questions and enabled the researcher to instantly rephrase the questions if the terminology used in the form was not fully understood by the respondent. Each interview took about an hour to complete. Apart from the demographics which characterised the surveyed people, the questions were related to the utilization of benchmarking, taking all aspects of the method into account. The questions concerned the reason for using benchmarking, items compared in the benchmarking process, areas of application, implementation of the methods used, and the flow of information related to the application of best practices. Questions were asked about formal and informal benchmarking, application of functional benchmarking for comparing business functions, and the benefits of using this method. It allowed to obtain an answer to the research question whether benchmarking facilitated the development of the hotels. All surveys were returned and all the surveyed directors confirmed the use of benchmarking[2] in their hotels. An analysis of the responses was made according to hotel groups divided on the basis of the selected factors (chain affiliation, category). Pearson's correlation coefficient was calculated for the individual responses and on that basis, the researchers obtained responses to the question of whether and how the selected factors differentiate the approach to benchmarking and its utilisation in a particular hotel.

Benchmarking in the hotel industry – results of research

With regard to the analysis of data, it is worth noting that benchmarking is applied in all the surveyed hotels. Most of the questions posed in the survey were open, therefore the respondents could choose more than one an-

[2] All the hotel directors confirming the use of benchmarking referred to the definition of the method which was given by the authors of the survey i.e. ..: 'benchmarking is a company's search for a model and best existing practice solutions which lead to a competitive advantage in relation to specific competitors'. That was designed to exclude differences in the interpretation of the concept and standardization of the test results.

swer. Three main reasons were indicated for the utilisation of benchmarking in the hotels. The most important was the desire to improve customer service – the reason indicated by all the hotels. The second reason was the need to gain a competitive advantage (11 hotels out of the 12 surveyed) and the third was to reduce costs and increase financial results (10 hotels out of 12). The introduction of new technological solutions or requests from supervisors were of less importance. It is worth mentioning that the responses were very similar regardless the standard of service or category of the hotel (4- and 5-star hotels or 3-star). In fact, the correlation coefficient between the responses in the two groups of hotels reached 0.96.

The other factor affecting the different approach to benchmarking is hotel chain affiliation or those ‘acting alone’. As a reason for their interest in benchmarking, chain hotels often listed the possibility of introducing new technological solutions which was completely overlooked by independent hotels. That was one of the reasons for the competitive edge of chain hotels. In this case, the correlation coefficient reached 0.78.

Therefore, the knowledge of what was or is the subject of benchmarking comparisons in the surveyed hotels seems to be very important. In all of the hotels, services and their quality were considered natural and logical aspects, given the nature of the hotels. The organization of the customer service department was no less important, indicated by 10 out of 12 hotels. However, in this case a certain difference in responses was revealed, which depended on the standard of the surveyed hotels (the correlation coefficient for the responses of both groups was 0.76). The higher standard hotels put much more emphasis on customer relations and promotional activities. Perhaps it was done to build relationships and increase the number of loyal customers accustomed to the brand. There were no significant differences in the approach to that issue between the chain and the ‘single’ (independent) hotels.

Regarding the area of the application of benchmarking, a very large diversity and dispersion of the responses was noticed. This was probably due to the large number of options that could be considered by the respondents (there were 13). However, it does not change the fact that a major area was overlooked and the efforts of the hotels in this field were scattered. By far, services were the most frequently mentioned as the main application area of this method (9 out of 12 hotels). Sales and marketing, advertising and public relations (7 and 6 times, respectively) were also mentioned. However, in the utilisation of benchmarking, there were very large differences in responses depending on the standard of the services provided and network affiliation as the correlation coefficients were 0.41 and 0.50 respectively. The 3-star and independent hotels paid very little attention to problems in sales, marketing and advertising which were essential for the higher category hotels. The following areas were occasionally taken into account: innovation, strategy and the search for new markets, which created the impression that benchmarking was used mainly for the improvement of current processes and not for setting strategic objectives. Strategic benchmarking was missing, the most 'critical' and demanding process in managing a company [Grant2008], the purpose of which is to reveal the best business strategies of other firms [Xiang et al., 2007]. Moreover, this form of benchmarking serves long term objectives, which requires greater flexibility and predictability on the part of the management. In the area of service quality, e.g. quality of hotel services, or creating innovative solutions, strategic benchmarking is particularly important as at enables advanced analysis of the effects of future actions [Chen, Van Dalen 2010]. It is worth noting that benchmarking should be implemented in those company structures and departments which are critical and essential for the functioning and success of any company [Massheder, Finch 1998].

The vast majority of respondents found the implementation of benchmarking moderately easy (not precisely specifying what it means) and the directors of 3 out of 7 higher standard hotels found the implementation of the method very easy or easy. The chain hotels provided similar assessment. Probably, the point is that hotel chains use established and top-down procedures which are the result of many years of experience with other network partners.

In response to another question, namely experience in the implementation or utilisation of benchmarking, the different variants of responses were assessed which ranged from 1 point (very easy) to 5 points (very difficult). In other words, the higher the sum of responses, the greater the difficulties in the implementation of the method. Variation in the answers amongst respondents from hotels of varying standards was very significant with a correlation coefficient of only 0.17. The directors of the higher standard hotels

Tab. 1. Experience in the implementation of benchmarking taking various aspects of the method into account.

Aspects of benchmarking that could be difficult or problematic	**Number of responses**
The selection of people for the benchmarking team (staff, expertise)	34
Identification of the areas (processes) subject to benchmarking	29
Establishing partners (companies) in benchmarking	25
Obtaining consent of the benchmarking partner to obtain information	38
Obtaining relevant information from the benchmarking partner	33
Data processing to reach a level of usability in the company	31
Streamlining operations in the selected areas (improving processes)	29

Source: own research.

perceived many more difficulties especially in the following areas: obtaining consent of the benchmarking partner to obtain information, the selection of teams responsible for benchmarking and obtaining relevant information from a partner. The identification of improvement areas and establishing partners were the easiest in the implementation of the method. The acquisition of information and selection of people posed most problems for the chain hotels. The replies from the managers of the 3-star hotels were so little differentiated that one could get the impression that they lack much experience in the application of this method despite their verbal statements. The following table depicts the total number of points which show the scale of difficulty for each of the aspects of benchmarking (Table 1).

Thus, if obtaining information is one of the fundamental problems in the implementation and application of benchmarking, it is important to answer the question of what the flow of information on the use of best practices within a company really is. The respondents had to choose from 8 different possibilities. The responses were very scattered which demonstrates that there is no established method to deal with this issue. The most common (9 out of 12 hotels) response was meetings with those responsible for benchmarking (general meetings, appointments) which allow discussion. The intranet was often chosen (by half the hotels). Other methods (internal instructions, projects, meetings with specialists, etc.) were used occasionally. The responses in both hotel groups according to the standard of provided services were similar and the correlation coefficient was 0.79. Projects (probably mandated by headquarters) were listed by the chain hotels. In the hotel groups (chain and independent), the correlation coefficient was 0.60.

It is likely that in a majority of the surveyed hotels (60%),the practices described regarding the utilisation of the method are the result of informal benchmarking[3], which is not so demanding or difficult to implement in terms of procedure. It includes activities such as reading about similar processes, talking with competitors and partners about common problems, observing the competitors during trade fairs, making customers and suppliers compare their business activities with other companies, etc. [Mann 2010]. On the other hand, formal benchmarking is conducted in compliance with all the established stages which contain decision making on the subject of comparative analyses, the choice of a potential partner (one of the most difficult and also key decisions when using this method), information gathering, data analysis and process implementation [Andersen 1999;Prussak 2006). Admittedly, amongst chain hotels, those proportions were slightly different as half of such hotels applied formal benchmarking.

[3] In 2012, similar results were obtained on the basis of research conducted in Rzeszów, i.e. the utilisation of mainly informal benchmarking.

Another question in the survey concerned the type of benchmarking used by the hotels (internal, competitive, functional, product, marketing, operational, process, organizational and performance). All the respondents pointed to marketing benchmarking which relies upon a systematic study and analysis of customer reviews of the services provided by the organization and then their comparison with competitors' product reviews [Gierszewska, Wawrzyniak 2001]. This choice is a logical complement to the previous statements which show that the reason for the utilisation of benchmarking is to improve customer service, and that services are the subject of comparisons in the area of business operations. Competitive benchmarking was frequently mentioned (10 out of 12 hotels), which relies upon comparison with the leaders in the same industry, that is the competition, as well as product benchmarking where services are the subject of comparisons. The replies in the hotel groups determined (of high and medium standard, and chain or independent) were similar, as evidenced by the high correlation coefficient which reached the level of 0.82 and 0.77, respectively. Still, it is worth noticing the certain significant differences in responses from managers in both hotel groups. The higher category hotels and chain hotels used internal benchmarking to a much greater extent (5 out of the 7 hotels). This assumes cross-comparison of companies, interdepartmental comparisons and even comparison of positions within the company. Comparison in the implementation of related functions in the company or corporate networks which are interrelated organizationally are also taken into account [Cano et al. 2001; Kowalak 2003]. In the researched hotels, utilisation of benchmarking focused mainly on comparisons with branches (mainly in chain hotels). It was not applied in only 18% of the high category hotels when compared to half of the 3-star hotels. The fact that none of the hotels surveyed, which belong to the two groups, used functional benchmarking is extremely interesting. This would involve the search for opportunities to improve some functions carried out by the company outside its own sector and companies that are not their direct competitors. This is confirmed by the response to the question of taking into account companies from different industries in choosing a partner for benchmarking in benchmarking analysis. None of the respondents gave an affirmative answer to that question. This shows a serious limitation in the search for the best solutions and not going beyond the relatively narrow circle of companies which belong to the same sector. It excludes the fact that the most interesting and original ideas can come from outside the sector and that deviation from routine is much more difficult to quickly adapt by competitors.

In contrast, half of the surveyed hotels applied performance benchmarking which relies on the comparison of data on the level of efficiency in the organization in terms of both its economic and operational performance. Amongst the various factors that may be important in the comparison of results, the most frequently mentioned were the quality of the products and services (in line with the imperative to improve customer service by increasing the level of services provided) and the prices of products and services (which, apart from quality, have decisive influence on the decision-making of consumers). Amongst the high-category hotels, the following factors were mentioned: reliability of processes and financial measures. The replies in the surveyed groups did not differ too much because the correlation coefficient was 0.80. Big differences could be seen when comparing chain and independent hotels. The correlation coefficient amongst the answers from those hotel groups was 0.28. Whilst in independent hotels, the targets for comparison were primarily the price of services and their quality. In chain hotels, focus was placed on comparisons of financial measures (net profit, operating profit, sales revenue, profitability ratios, ROI – return on investment, etc.) and the product rate of delivery. That was due to strong competition within the network and strong pressure from their boards in terms of management efficiency, which in turn, contributed to gaining a competitive advantage over their competitors by the chain hotels.

Process benchmarking was not often applied in the surveyed companies. It was mainly used to improve the competitiveness and efficiency of companies by streamlining operational management [Haffer 1997]. It was indicated by only 4 out of 12 hotels (including 3 with the highest standard of service and 4 chain hotels), which primarily took the processes related to sales and customer service into account (which once again confirms the main objectives and priorities which the hotels set in their benchmarking activities).

The results of the utilisation of benchmarking in hotels are benefits as seen by their managers. Evaluation of benefits, including 15 variants, was conducted on a scale from 0 (no benefits) to 5 points (very large benefits). Each variant had to be assessed by the respondents according to the above ranking. In other words the higher the total score, the more benefits recognized by management. Out of the 15 possible variants of the application of benchmarking, the most beneficial were the increase in customer satisfaction, improvement of the quality of services and the ability to determine the company's position in the market (relative to its competitors); that was especially important for the independent hotels. The structure of the responses varied between the hotel groups (correlation coefficient for the groups of high- and medium-category hotels was 0.65), but the most important benefits were similar. The 4- and 5-star hotels perceived most benefits in the possibility of equalling their competitors (3-star hotels were not interested). On the other hand, launching new services (sic) and the improvement in their execution time were perceived as the least important benefits of the method. The large variation in the responses was also seen in chain hotel and independent hotel groups (correlation coefficient of 0.30). For chain hotels, the primary benefit was improvement of their financial results which confirms the above mentioned trend. On the other hand, they saw little benefit in their changes in the approach to the style of leadership in their organizations. This is understandable as in retail chains, leadership results from collective ownership. These observations (especially the small benefit in launching new products) are very disturbing as they show the conservative attitude of the managers, their lack of a long term company vision and that they do not consider new products in the process of building their competitive position.

Finally, it is worth noting that the managers also had different experiences with issues, barriers and constraints encountered when introducing benchmarking. Most often mentioned were the market barrier, the fear of competition (7 out of 12 hotels) and barriers related to lack of knowledge (5 out of 12 hotels). The answers were varied. The high-category hotels and hotel chains also pointed out the problem of dishonest partners (probably within the same hotel chain).

Summary and conclusions

There are many possibilities for the utilisation of benchmarking in the hotel industry. It can be assumed that benchmarking as a way to improve competitive advantage increases along with the rise of market competitiveness. The threat to eliminate weaker companies is significantly reflected in services, particularly in the provision of those tourism-related. This is connected with the fact that the service companies (hotels) cannot be limited in their 'competitive struggle' to tracking only registries and numbers. Equally important, if not more important, is the focus on processes. In hotels, benchmarking should take their nature into account, and comparative analysis should refer to similar hotels, both in terms of category, ownership status and regional conditions.

Conclusions on the possibility and ways of using benchmarking in hotels located in cities can be divided into three groups:

1. The selection of activities which are common and consistently implemented by all researched hotels,
2. The identification of activities which differ according to the hotel affiliation or category of the surveyed hotels,
3. The identification of such benchmarking activities in the surveyed hotels which are of concern and which lead to a critical assessment from the viewpoint of the effects of benchmarking.

Re.1.

Based on the survey, it can be stated that benchmarking was used in all the hotels surveyed in Poznań, and the reason for its application was the desire to improve customer service. Benchmarking was primarily used to improve the current effects of the companies' efforts. Also, for the vast majority of the surveyed companies, the search for improved competitiveness and cost reduction were important reasons for using this method. The logical consequence of these plans was the fact that it is services and their quality which determine the choice of this area as the subject of comparisons. Therefore, benchmarking in marketing was the most popular type (mentioned by all the hotels). Almost all the hotels (10 out of 12) also stated that they apply competitive benchmarking. That was confirmed by the fact that the quality of products and services was most often mentioned amongst the factors which might have been the target of comparisons.

Re. 2.

Research also revealed many differences in the approach to benchmarking amongst the surveyed hotels. Assuming that network affiliation and hotel category are the differentiating factors in the utilisation of benchmarking in the hotel industry, it was decided to show this relationship in the activities of the companies (Table 2).

Tab. 2. The effect of network affiliation and hotel category on the diverse use of benchmarking in the hotel industry.

The utilisation of benchmarking in the hotel industry	**Correlation coefficients**
	Chain affiliation (chain hotels), (independent hotels)
Reasons for benchmarking	0.78
Subject of benchmarking comparisons	0.83
Frequency of benchmarking utilisation	0.07
Area of benchmarking application	0.50
Course of benchmarking implementation	0.77
Experience in benchmarking implementation	0.58
Flow of information on best practices	0.60
Types of applied benchmarking	0.77
Utilisation of internal benchmarking	-0.30
Subject of analysis as part of functional benchmarking	0.75
Factors analysed in performance benchmarking	0.28
Elements considered in process benchmarking	0.60
Benefits of benchmarking utilisation	0.30
Problems in benchmarking implementation	0.33

Source: own research

One significant difference in the approach to benchmarking is the frequency of its utilisation. In the higher-category hotels, the method was applied systematically, whilst in the 3-star hotels, usually when, according to the managers, it was necessary. Differences also apply to the area of the application of the method. In chain hotels and those of a higher standard, sales, marketing and advertising were the main areas, whereas in other hotels, it was the quality of services. It is of concern that the 3-star hotels showed negligible interest in the area of benchmarking application, including innovation, strategies and the search for new markets. This demonstrates that the primary use of the method is to solve current problems. It was also noted that the chain hotels and those of higher standard had much more experience in the utilisation of this method. The management saw obtaining information and the appropriate selection of people as the main problem areas. Owing to intra-structural facilities0 those hotels were also much more likely to use internal benchmarking. The purpose of comparison was also different. Whilst the independent hotels focused mainly on prices and the quality of their services, in chain hotels, emphasis was put on the comparison of financial results.

Re. 3.

The results of research also helped to draw attention to a number of disturbing factors regarding the use of benchmarking in hotels. They include the fact that more than half of the surveyed hotels used informal benchmarking. This is of course permissible, but the process itself is superficial. That approach was expressed by the recognition of verbal communication as the main method for information flow within the organization. The lack of courage and openness on the part of the managers of the surveyed hotels to search for patterns and benchmarking partners outside their own industry and the group of their closest competitors was quite surprising. This was evidenced by the fact that functional benchmarking had not been used (not a single hotel indicated this type of benchmarking), which in itself was a great opportunity for innovation. Also, process benchmarking was not often applied.

In summary, benchmarking is a method of management which initiates changes of an organizational and decision-making nature within a company, and amongst employees, cultural changes and in their mentality. The fact that benchmarking motivates learning and often results in new impulses and ideas repeatedly stemming from the number of problems and limitations which emerge from its implementation is of great importance. However, effectiveness and efficiency of the method is primarily determined by the accuracy of its implementation as well as and the openness and courage of managers in implementing possibilities for improvement in company functioning.

The study findings allow us to formulate certain conclusions about the strategy for benchmarking application in hotels. Such a strategy should contribute to closing the gap between theoretical considerations and hotel practice. The key application that comes to mind is the use of benchmarking in tasks connected with the long-term development vision of a hotel. The benchmarking method must not be used solely for resolving day-to-day operational issues. Instead, it should provide an opportunity "to take a leap forward". Therefore, it is essential that the method be used continuously and regularly. It is also necessary to reduce the role of informal benchmarking and to be open-minded in searching for partners and role models outside the industry, where original, innovative and unique solutions can be found. There is also a need to focus on the outcomes of benchmarking in terms of its impact on hotel economic performance.

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MOŻLIWOŚCI I SPOSOBY WYKORZYSTANIA BENCHMARKINGU W PRZEDSIĘBIORSTWACH HOTELARSKICH

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Abstrakt

Cel. Celem rozważań jest próba odpowiedzi na pytania: czy i w jako sposób wykorzystuje się benchmarking w hotelach, co jest przedmiotem porównań benchmarkingowych oraz jakie są korzyści ze stosowania benchmarkingu w przedsiębiorstwach hotelarskich.
Metoda. Narzędziem badawczym był formularz ankietowy który wypełniali dyrektorzy hoteli. Do badań wybrano 12 hoteli zlokalizowanych w Poznaniu, a więc 18% wszystkich obiektów funkcjonujących w tym mieście. Analizy odpowiedzi na stawiane pytania dokonywano w grupach hoteli wyodrębnionych na podstawie wybranych czynników (przynależność do sieci, kategoryzacja). Dla poszczególnych odpowiedzi obliczono wskaźniki korelacji Pearsona, aby uzyskać odpowiedź na pytanie czy i w jaki sposób wybrane czynniki różnicują podejście hotelarzy do benchmarkingu.
Wyniki. Stwierdzono, że analiza porównawcza powinna odnosić się do obiektów podobnych zarówno pod względem kategoryzacji, statusu własnościowego jak i uwarunkowań regionalnych. Benchmarking stosuje się przede wszystkim dla poprawy efektów bieżących wysiłków firmy. Ważnym powodem stosowania tej metody jest również dążenie do poprawy konkurencyjności oraz zmniejszenia kosztów. Zaskakuje natomiast brak odwagi i otwarcia ze strony managerów do poszukiwania wzorców poza własną branżą i grupą najbliższych konkurentów.
Ograniczenia badań i wnioskowania. Badania dotyczyły jedynie hoteli miejskich na przykładzie Poznania. I chociaż liczba badanych hoteli była wystarczająca do próby uogólnienia wyników w tym mieście, to jednak chcąc dokonać szerszych uogólnień należałoby znacznie zwiększyć próbę badawczą. Warto byłoby także określić inne czynniki (poza kategoryzacją i przynależnością do sieci), które różnicują podejście managerów hoteli do benchmarkingu.
Implikacje praktyczne. Badanie i proces wnioskowania będący rezultatem analizy uzyskanych odpowiedzi miał wymiar czysto praktyczny. Odpowiedzi dotyczyły między innymi przebiegu wdrażania benchmarkingu, doświadczeń w jego wdrażaniu, czy sposobu w jaki następuje przepływ informacji o stosowaniu najlepszych praktyk wewnątrz przedsiębiorstwa. Pytano też o rodzaj stosowanego benchmarkingu oraz efekty jego stosowania w hotelach.
Oryginalność. W polskiej literaturze bardzo rzadko prowadzone są tego typu badania empiryczne, tym bardziej że wymagają one zbierania danych w drodze osobistych rozmów z managerami hoteli.
Rodzaj pracy. Artykuł poglądowy

Słowa kluczowe: benchmarking, hotele, turystyka, stosowanie benchmarkingu

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TOURISM AS A NEW FORM OF LEISURE IN LIGHT OF "WĘDROWIEC" ["THE WANDERER"] WEEKLY MAGAZINE (1863-1906)

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Abstract

Purpose. This issue attempts to identify "Wędrowiec" [The Wanderer] as a source of knowledge about the history of tourism and to define the editorial team's approach to this subject.
Method. The study covers the information related to tourism in general, its types and development, and promotion among the Polish society published in "Wędrowiec" [The Wanderer] for 44 years when the magazine was being published, i.e. from 1863 until 1906. 2,289 issues of the magazine were published. Historical methodology has been applied.
Findings. Analysis of the material led to the conclusion that "Wędrowiec" [The Wanderer] proved to be an appreciated and involved witness of the emergence and development of tourism. For 44 years, the subject was handled with varying levels of intensity. Nevertheless, the publications helped restore the picture of the conditions and problems faced by the tourism of those days.
Research limitations and conclusions. Conclusions were based on analysis of the collected source material. An interesting complement would be to compare the collected material with the remaining contents of the magazine (as indicated in the article, topics related to tourism are just a small part of the issues presented in "Wędrowiec" [The Wanderer]).
Practical implications. Conclusions from analysis of the collected material are very important for the existing knowledge about the history of tourism in the latter part of the second half of the 19th and early beginnings of the 20th century.
Originality. Approaching the subject from the perspective of a specialist magazine and analysis of the collected material included in "Wędrowiec" [The Wanderer] that has not been analysed within the context of the influence it could have on the development and promotion of tourism among the Polish society in the second half of the 19th and the early part of the 20th century.

Type of paper. Monographic article.
Key words: "Wędrowiec" [The Wanderer]; history of tourism

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Introduction

The 19th century brings us the picture of a new traveller, who is looking for opportunities to fulfil his/her dreams about travelling, exploring the world and cultures. The maxim (…) *sit at home and live honestly* (...) [*Office for Cook's travelers* 1877, p. 214] used previously to educate (...) *young people who wanted to spread their wings* (...) [Ibid] was supplanted by travel (...), *for recreation, for fun* [Topolski 1903, p. 745], for unforgettable moments (...) *elation and ecstasy, memories of which* (...) *made [us] refreshed* (...) *in moments of doubt, brooding and disgust for life and people* [Ibid].

An interesting source of material which allows to illustrate the then approach to the new forms of spending spare time turned out to be Warsaw's "The Wanderer"[1]. It was a weekly tourist profile magazine appearing from 1863 to 1906[2], thus it was somehow predestined to take up discussion about the subject[3]. The magazine's editors and colleagues undertook a wide range

[1] The materials gathered in "The Wanderer" were marginally used for studies on the history of tourism. Perhaps it was caused by the fact that the magazine so far, like the other Polish tourist and sightseeing magazines, did not live to create in a context related to its influence on the development of Polish tourism and sightseeing [For more information about development in the field of the history of Polish tourist and sightseeing press, see: Cybula 2007, No. 18]. On the content of "The Wanderer", according to findings, a Master's thesis and three Ph.D. theses (unprinted) were created, in which, among others, topics related to tourism and touring were recognized. These studies were based on a selected range of materials collected in a journal, thematically and temporary limited [See: Goszczyńska 2004; Wypych 2010; Cybula 2014; Kamisińska 2010]. There is also a series of articles concerning the content of "The Wanderer" in the years 1863-1906 [See: Idem 2010; Idem 2011; Stocka 2007, Cybula 2015]. More was written about the role of "The Wanderer" on the floodplain of literature, music, art and technology. These works focused especially on the years 1884-1887, when the magazine was seized and carried out by a group of positivists. Their achievements were particularly important for development in these fields. The part of time and theme related to the positivist literature and art in the country and the world underwent rich elaboration. There were a number of synthetic mentions about "The Wanderer" made by scholars of literature and art, detailed articles and papers on people associated with "The Wanderer". [See: Chmielowski 1898; Potocki 1911; Czachowski 1934; Kleiner 1960; Dobrowolski 1960; Detko 1980; Nofera-Ładyka 1985; Dictionary Polish literature of the 19th century, 2002; Markiewicz 2004; Jakubowski 1947; Idem 1951; Idem 1967; Porębska 1952; Kamisińska 2009; Kmiecik 1984; Piasecki 1991; Idem 1976; Tchórzewska 1992; Kosinski 1928; Szwejkowski 1932; Brzozowska 1971; Olszaniecka 1971; Idem 1984; Tchórzewska-Kabat 1982]. There were also some monographic works. These include: Vetulani 1970, Kabaty 1978, Piasecki 1992.

[2] The magazine is preserved in its entirety, but it had to be compiled by the resources of different libraries. The analysis of the source material was done primarily basing on the resources of the Jagiellonian Library, The Library of The Princes Czartoryski in Cracow, Scientific Library of The Polish Academy of Learning and The Polish Academy of Sciences in Cracow and basing on the resources of The Library of The University of Lodz (digitized and posted on the website of The Digital Library of The University of Lodz).

[3] The press role in the second half of the 19th century in the creation of new phenomena and popularizing them in the Polish society was leading. In the preface to the work "Warsaw of positivists", the following words can be found:: *Indeed, you can say without any exaggeration*

of tourism issues, presented a critical and creative approach to the new phenomena. They went beyond the basic function that was limited to observation and recording. For 44 years, within the magazine, not only the fact of the emergence of a new fashion in tourism was captured, but also the transformation and the development was illustrated achieved in those years[4].

The aim of this article is not comprehensive analysis of the material gathered in the journal because of its richness and limitations arising from the nature of this publication. This work is only a contribution to further research, based on selected examples, relevant for the title of the article and its purpose.

Tourism

On the pages of the weekly, motivation was pointed out, which in the last decades of the 19th century became leading when deciding to travel. At the beginning of the 19th century, few people decided to go on trips leaving home. Such situations were predominantly caused by necessity, much less pure curiosity and thus, understood the need for leisure activities:

> *No one travelled for pleasure: exceptionally very rich people who could travel quickly, and even those mostly regarded travelling as a sad necessity. At that time, there were no so called "Commis Voyageurs" who now fill out hundreds of cars on the iron railways* [*Office for Cook's travelers* 1877, p. 214].

that no literary career could exist in after-uprising Warsaw if there are no magazines. It is, as you know, a phenomenon that distinguishes the era of positivism from the previous ones. In contrast to before, the press (not the court or lounges) was the main forum of philosophical, scientific and literary polemics (...) *The editors often had a sense of patriotic mission, the specific shape of which was reflected in the formula of the magazine.* [Kulczycka-Saloni, Ihnatowicz 1992, p. 8]. Although the role of the press is shown here in the context of creation of personalities from the world of literature and creating philosophical, scientific and literary problems, it can also have a similar role attributed to it in terms of creating and popularizing new phenomenon related to tourism and touring.

[4] Until 1905, "The Wanderer" originally appeared regularly every Thursday, and later – every Saturday. Disturbances in the regular issue of the journal appeared in late January and early February 1905. Political events associated with the revolution in Russia and in the Polish Kingdom destabilized the publishing house and the editorial-board of "The Wanderer". Consequently, in 1906, this led to a merger between "The Wanderer" and "The Weekly Illustrated" (from No. 18 of 1906 by the end of 1906). In the period from 1863 to 1906, 2,289 issues were published, of which 35 were issued after the merger. At the beginning, distribution of "The Wanderer" was focused mainly on Warsaw, its provinces, neighboring provinces and the Empire. From the mid part of 1878, its range expanded to other Polish lands lying under Austrian and Prussian occupation. This news is developed on the bases of information in the imprint and vignette of "The Wanderer", and also are based on information "From the Editor" published inside the individual numbers of the magazine or the publishing brochures attached to them.

Due to the conditions of travel, wayfarers were sometimes described as "martyrs of travels" [Ibid, s. 215].

The reasons for trips were more often associated with the need to rest, relax, (...) *gladness and personal satisfaction* [Ant. Sk 1890, p. 287]. A new form of leisure time was captured in the words:

> *kaleidoscopic journeys, that we take, it means wandering around the world, here and there, wherever chance takes us, as a friend's advice or Baedecker's tips, from wandering aimlessly, not for any professional studies, not for looking into the life of foreign nations to assimilate what is brightest in their intellectual achievements, but simply to see something different, slide on the surface of cultural progress of abroad, come close to the glare of modernity* (…) [Col 1905, p. 722].

Thanks to technical innovation, which greatly facilitated communication, and (...) *under the unbearable burden of the urban difficult living conditions during the hot summer months* (...) [F.S. 1880, p. 87], and because of the prepotent trip fashion's influence spreading especially among the middle-class and the wealthy, to emphasize their social status or "to kill time", *such trips take place mainly for health or pleasure, and usually these two reasons are combined together* (…) [Ibid].

Means of transport

The popularity of tourist trips could increase mainly due to the significant improvement of communication quality. As long as railways did not take control over roads, few wanted to bother with a journey, which, primarily was to be organized for pleasure. Too long stays in a means of transport that were available at the days before the era of steam engines could not guarantee it in any measure: *nowadays to get from Warsaw, e.g. to Cracow, it is enough to spend half a day in a comfortable car railroad. Years ago, our fathers who were travelling such distances trembled for several days in a cramped stagecoach* [ig 1903, p. 407].

At least until 1884[5], on the popular route from Cracow to Zakopane, travellers had to deal with the hardships of journey in cramped and uncomfortable vehicles during the second half of the 19th century. There could be no pleasure from travelling at that time because there was no railway connection to Zakopane. Popular means of transport were simple - not to use the term primitive - wooden carts, also known as a "highlander's trolley" (Fig. 1). The journey took about two days and requiredpatience and endur-

[5] That year, the railway connection from Cracow to Chabowka was built. It was not until 1899 that Chabowka and Zakopane were connected by railways.

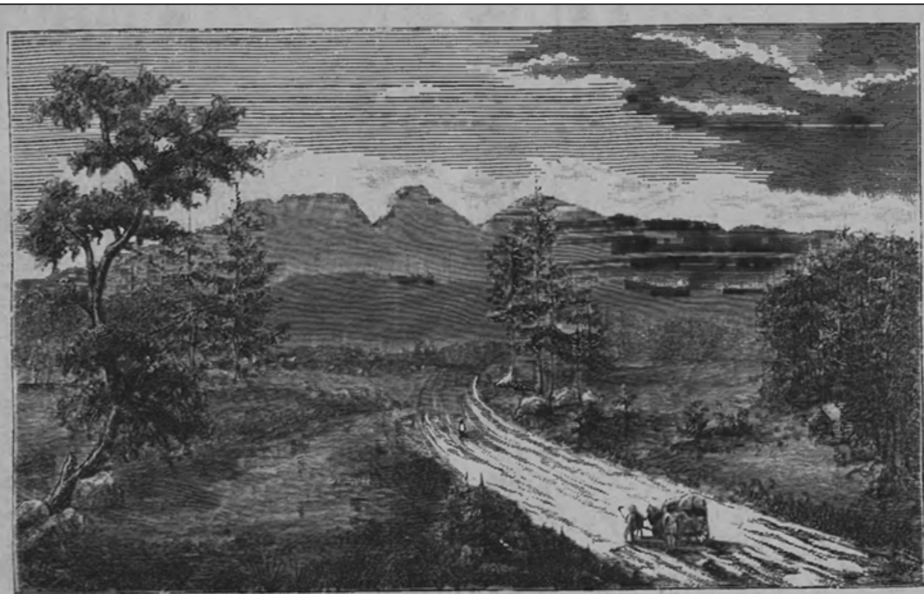

Fig. 1. Road to Zakopane.
Source: "The Wanderer" 1883, No. 11, p. 165.

ance. The road was bumpy whichreduced the travelling comfort even more. Gustave Le Bon, a French tourist who went for a trip to the Tatra Mountains in 1879 recalled his experience in the words:

> *From Cracow to Zakopane-village at the foot of the Tatra Mountains, the main point, from which all the tours set off - transit on wheels takes 18 hours. There is no systematic, furnished transportation from Nowy Targ, and for four or five hours of travel from Zakopane, you have to ride on the highlander's trolley* [Bon 1887, No. 17, p. 179].

For the guest from abroad, the journey maintained in his memory (...) *as a most horrible earthquake* (…) [Ibid, No 20, s. 235]. Fortunately, there was compensation for the nuisance in the form of landscape which was so charming, that the author almost completely obscured these inconveniences: (...) *I forgot the weariness of the journey* [Ibid].

In 1899, when the tourists lived to finally see railways from Cracow to Zakopane, a passenger train journey lasted six hours, and by a fast train - a little over four hours. The trains ran three times a day, and during summer time - up to four times [See more details: Rouppert 1913, p. 15; Krygowski 1973, p. 52; Chwaściński 1988, p. 45; Długołęcka, Pinkwart 1989,

p. 20; Pisera 2008, p. 15; Homola 1991, p. 190; Paryski 1991, p. 21; Nowak 1988, p. 35][6]. Enjoying convenient means of transport, travellers could additionally also use the cars, after being charged, which allowed observation of the beautiful landscapes passing by:

> (...) *what you see, please believe, does not lag behind many landscapes of the Swiss, Tyrolean and those exaggeratedly praised of Semmering*. (...) *You should sacrifice approximately one and a half guilder additional fee to the ticket from Cracow to Chabowka. For this surcharge, you have the right to get into the last, fully glazed car of first class like the tourist carriages in Switzerland and Italy. There are no benches there, but only movable seats instead, which are arbitrarily set so you can see what is in front of you and to the sides in the surrounding area* (...), *at a glance* (...) *no one will regret the expense of taking a seat in that glassed car* [Werytus 1898, p. 648].

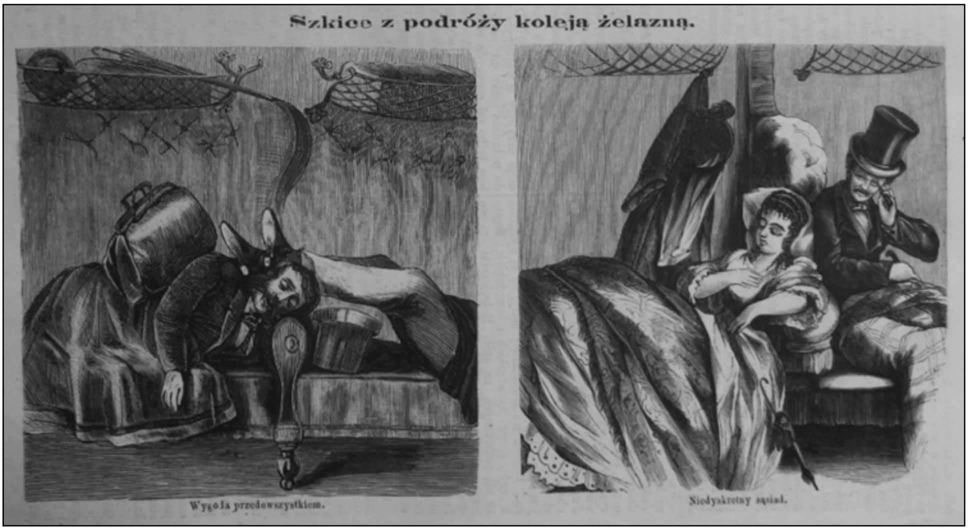

Fig. 2. Iron rail sketches from travel.
Source: "The Wanderer," 1868, No. 264, p. 57.

However, before tourists shifted to convenient, fast and relatively inexpensive trains (Fig. 2), they were traveling in horse carriages that moved on roads more or less adapted and maintained to this type of communication. Travelling on dirt roads was bearable only during periods of good weather (if not considering dust and etc.). During any precipitations, pas-

[6] In 1883, the number of tourists visiting Zakopane amounted to 634. In 1885, this number increased to 886 people, and in the following year, as many as 3,123 visitors. After the year 1899, according to some sources, the number of tourists increased up to 10,000. [See: Paryski 1991, p. 21; Homola 1991, p. 180; sg. 1880, p. 586].

sage was very difficult. Travelling conditions on such routes are described in the "The Wanderer" in the following:

> *Despite the small number of railways, access to communication such as dirt and main roads is lamentable, and when muddy autumn and spring come, in many places in the country, transporting goods must be stopped or, if passage is necessary, it is laden with so many difficulties, exhaustion and destruction of livestock that overcoming the several miles, causes more loss in time and money than passing from one end of Europe to the other in normal conditions* [ant. 1891, p. 648].

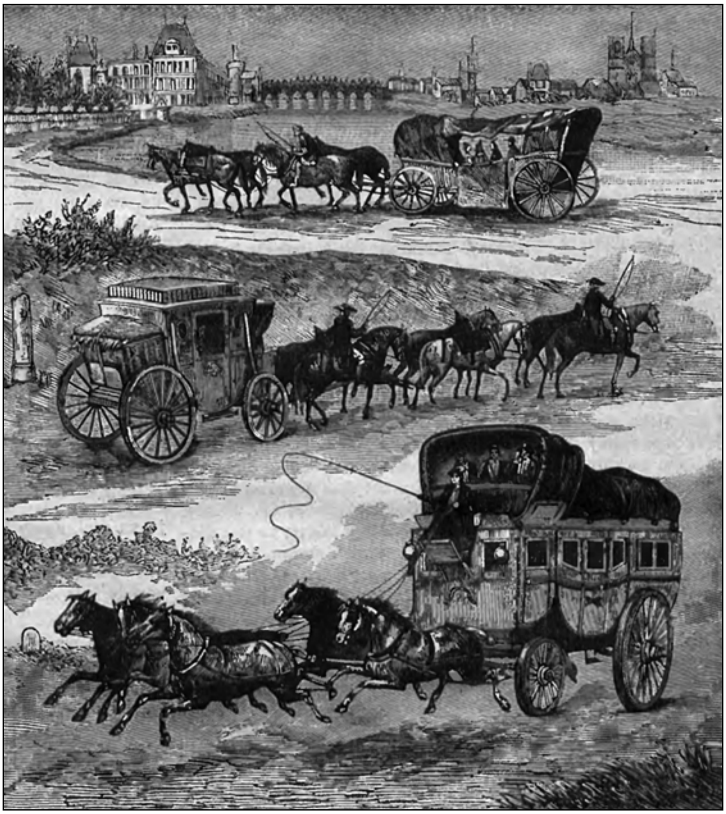

Fig. 3. A public carriage from the 17th century. A post carriage from the 18th century. A stagecoach from the 19th century.
Source: "The Wanderer" in 1888, No. 10, p. 115.

The journey from Berlin to Gumbinnen in East Prussia - (...) *105 postal miles took 12 to 14 days* [*Office for Cook's travelers* 1877, p. 214]. A horse carriage overcoming this route did not look much better than the "highlander's trolley" previously described:

> (…) *it was covered with pitched canvas and had no compartments inside - such were arranged by coffers and crates in which mail was transported. In that post ark* (Fig. 3 – I.C.), *there was a space intended for travellers. There were two planks used as benches on which three persons could be seated;* (...), *coffers and crates served as the only sleeping areas* (...). *There were no windows in such carriages, but to the right and left, pitched canvas was cut open so travellers could roll it up or down* [Ibid, pp. 214-215].

It was possible to cover the distance, as in Poland, only if there were passable conditions during good weather, because (...) *in the autumn period or early spring* (...) [Ibid, p. 214], you could make way on them, "head over heels" in the mud. There was also a high probability of overturning the carriage. The way to avoid this was by making the mail conductor greater in diligence, paying him an additional amount while driving.

Travelling in North America at the beginning of the second half of the 19^{th} century took place mainly by transcontinental stagecoach (Overland Mail) that was shortly called *stage* or *coach*: A *railroad was not the most important factor of colonisation in the United States, which required already constituted social relations, but a stagecoach pulled by six brave horses* (...) [Simoniu 1869, p. 195]. Referring to conditions, there was no comfort of travel too:

> *Heavy machines sway on leather springs. There are nine spots inside for the same price* (...), *of all the disadvantages, the most annoying is the crowd* (...). *being constantly prodded by someone's elbows and knees, pleading* (...) *for the fastest arrival to the destination as possible.* (...) *Very soon, you do not feel your bones, and even get seasickness after being shaken and bruised. The unbearable, blinding dust is everywhere* (...) [Ibid, pp. 195-196].

In comparison to travelling in Europe, the only one improvement was placing coffers and crates not inside but on top of the coach or in the back, tying them with straps.

The benefits of travelling by rail cannot be underestimated within the context of what is said above. Both convenience and saved time even induced travel, (...) *to wander where pepper grows, discover new worlds, to be a guest at courts of African kings and chieftains* [*Foreign Chronicle* 1865, p. 44].

Travel comfort is not only the number of kilometers covered as quickly as possible[7] in a convenient vehicle, but also, appropriate company to share compartment with during train travel. The editorial office of "The Wanderer" tried to keep their readers updated on world's novelties. This time, they

[7] Another example of shortening the travel time by introducing a rail route concerned travel from Paris to Bordeaux: *According to the news of "La Nature" magazine in 1765, passengers travelled in equips from Paris to Bordeaux for 14 days, now, you only have to spend 8 hours and 43 minutes on a journey, which means that the journey is 37 times faster* [*Speed of passenger traffic a hundred years ago and now* 1894, p. 355].

reported about a reliable cure for bothersome fellow travellers. Following the reports of the "Saint-Louis Messenger" American newspaper, the guide "For traveling by rail!" was discovered. There is information in the publication about a useful invention:

> (...) *vending machines, artificial children, very useful to scare away passengers from railcars. Those machines vary in prices and sizes, from two to ten dollars, and from pocket size, up to life size accordingly to the prices they can cry quietly, moan, scream, squeal and shriek in a way that the most patient and least anxious human would be forced to flee* [*For traveling by rail!* 1888, p. 431].

Business travel *en masse*

Communication facilities, socio-economic reforms, rising living standards, the increase of urban population, the gradual improvement of workers' situation, science and education development, fashion for outside the home, and leisure, all resulted in systematic expansion of the travellers' society. Emerging opportunities instilled passion for tourism and define new needs of the mass "travelomania" phenomenon more and more. Also arising companies, dealing with the organizational issue of trips for those who want to go on a journey, allowed for the development of tourism in the second half of the 19th century. The pioneers in this field were obviously the English: *The Englishmen are ahead in all in terms of travelling* [*Office for Cook's travelers* 1877, p. 215].

The agency founded by Thomas Cook presented the paragon of "business travel *en masse*" [Ibid, p. 215]:

> *Henceforth, the major efforts of Mr. Cook was not only to arrange cheap travels, but at the same time, make them as comfortable as they could be. A traveller should have only one task: to derive pleasure from a trip, s/he does not need to worry about anything - neither tickets nor packages, nor help, nor information about a place; if paid to gentlemen Cook or their agents, the traveller is freed from all these worries* [Ibid, p. 216][8].

[8] The beginnings of professional travel agencies with a broad profile of operational activity related to the trip servicse performed mainly as tourism, must be found in the so-called. immigration offices. They dealt mainly with selling boat tickets and their clients were people migrating for economic reasons. With time, some of the immigration offices expanded their range of service becoming travel agencies. The Englishman Thomas Cook is reagarded as the creator of the first travel agency. Heorganized trips for 570 people in 1841. Very soon, similar enterprises were organised in other countries. The need for businesses that would occupy the full range of travel arrangements, i.e.: ticket sales, accommodation booking, tourist information, provision or organizing tour groups, could be proven by the number of generated travel agencies in the very short time. In 1907, there were 119 travel agencies in Germany and in 1939, there were already 1,049 such businesses. More information about the first travel agencies in the world, see: [Mączak 2001, p. 295; Necessary-Domańska 2008, p. 95]. The first com-

Very soon, branches of his office started to work not only in the biggest cities of England, not only in Europe in such cities like: Paris, Neufchâtel, Geneva, Basel, Lausanne, Lucerne, Brno, Zurich, Venice, Turin, Rome, Naples, Vienna, Cologne, Brussels or Amsterdam. Thomas Cook's offices were also opened in Cairo, Beirut and New York.

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panies engaged in organizing trips for tourists on Polish territory before World War 1 is little known. In a few lines, the history of these offices is presented by Z. Kulczycki [1977, p. 152], writing about the representatives of shipping lines operating mainly in Galicia and about the " Sophia Biesiadecki Travel Agency - Oswiecim" involved in selling boat tickets to America and train tickets. There is also the work of T. Dziekonski [1935, p. 6], talking briefly about the genesis of the first travel agencies, however, it focuses on the accomplishments after the war. In the Polish lands, amateurs of inland navigation, organizing tourist trips by steamboats caused the creation of the first travel agencies in very rare specialization. Such a term for these entrepreneurs does not seem to be exaggerated. Thomas Cook, organizing his first tour in 1841, did not lead any company providing professional services of this type. The next step was to start dealing with the professional organization of tourist events. In this case, it seems reasonable to say that, acting on Polish territory, the river shipping companies, offering tourist trips by steamboats on rivers, were the prototype of today's travel agencies. The results of Witold Arkuszewski's research, presented in the work "Vistula passenger ships of the 19th and 20th century" also lead to these conclusions, He wrote of walking paths organized by amateurs during the first half of the 19th century. Then, in 1854, by efforts of The Company's Board of River Navigation, whose co-owner was Andrzej Zamoyski, a steam navigation guide was published. In addition to information related to the timetable, the ticket prices, regulations, the guide also contained descriptions of the places and values of the Vistula route. W. Arkuszewski also indicated the formation of a new formula of cruises called sightseeing cruises in the '80s and '90s of the 19th century, about which he wrote as follows: *A new form of navigation was also cruises. They were organized both for closed groups, as well as for casual participants. The condition for holding the cruise was to gather approx. 60 people, because this number of passengers allowed a cruise to become profitable. There were numerous press reports and photographs in weeklies on the popularity of cruises . Tours were arranged to interesting tourist areas of Warsaw and Czerwinsk, Kalwaria Mountain, Mlociny, Otwock, etc. The traditional courses at Bielany during Pentecost were also maintained and greatly expanded . The universality of these events is seen in the frequency of ships sailing from Warsaw during Christmas, and for example in 1902, the notice of the board of The Steam Navigation Fajans noting about twenty ships sailing to Bielany every 10 minutes* [Arkuszewski 1973, s. 120]. Interesting information about the first travel agencies on the Polish lands have also been provided in studies conducted by E. Kowecka [1994, p. 345]. According to the author's findings, some group tourist trips were organized as early as in 1867. The "Sociable Travel Business" founded by Heliodor Grabowski would serve these purposes. The company offered the organization of a trip to Paris for an exhibition which was to be held. In the package, there was guaranteed passage, accommodation and tickets for the exhibition valid for 5 days. The author also wrote about offers of boarding for the railway line regarding "excursion trains" and "railway walks". M. Olkusnik [2013, p. 255], in his work titled "Travel, tourism and the extra-urban leisure in awareness of Warsaw's society at the turn of the 19th and 20th centuries" also wrote about the initiative of two Warsaw entrepreneurs: Joseph Raten and Joseph Stanislaw Wijaczyński, who were trying to establish " tour offices around the country and abroad". This information was presented on the basis of press announcements published in the "Warsaw Courier" in 1891. In the "Warsaw Courier", in the same year, information about 36 people who organized a two-week trip to Prague, Dresden and Berlin was also published. The organizer was a certain Mr. Keller - "entrepreneur of different collective tours." Unfortunately, M. Olkusnik could not determine the details of these projects. The issue related to the appearance of the first Polish companies organizing tourist events requires broader research, and the conclusions from them could probably help to revise the existing arrangements.

The English entrepreneur introduced a number of favourable tourist facilities. Travellers, using the services of his agency, did not need to take appropriate amounts of money in the currency of the country s/he went to, (...) *because any unpleasantness related to the exchange and bills issued by the owners of hotels, their waiters and messengers were spared by these gentlemen* [Ibid]. Having signed agreements with the best hotels in the main cities of the world,

> (...) *according to which the owner is obliged to make reckonings for both accommodation and food at the most conscientiously calculated prices* (...) *In this situation, Mr. Cook had an original idea to print small booklets for 5, 10, 15 and 30 days with coupons for such an amount of days, divided into those for housing, meals and breakfast* [Ibid].

The hotel stay fee was paid by a tourist using the coupons:

> *You receive a voucher for breakfast comprised of a cup of tea, coffee or hot-chocolate and needful rations of bread. You pay by a dinner voucher for a table d'hôte and by a housing coupon for a comfortable guest room, with a bed, electricity and service* [Ibid, p. 216].

Thomas Cook's "Business travel en masse" found followers very quickly. However, it was hard to compete with such branched businesses having excellent *savoir-faire*, and great knowledge in the field of interest [Ibid, p. 217]. The quality of services of similarly natured companies, as described above, often had to leave much to be desired, as in "The Wanderer" you could find such a warning: (...) we *advise you not to entrust your person to various ad hoc created associations, taking on transport very cheaply* [*Practical tips for those who are going on a universal exhibition in Paris* 1867, No. 232, p. 383].

Observing the achievements abroad in the field of tourist companies dealing with travel arrangements, selling partial services or the total organization of individual travel or for groups more often raised the needs for similar solutions on native soil. The Polish society organizations called for "collective tour companies", which could embark comprehensive preparation of holiday packages [Sk. 1896, p. 49]. In 1892, in "The Wanderer", there is mention of a travel agency being in Warsaw:

> *For all those casual summer tourists, a trip office organized in Warsaw will do the favour, modelled on similar businesses already existing abroad for a long time. This innovation should be welcomed on our soil and if the company in practice answers to the needs, good development can be expected in the near future. The office's programme says it will organize abroad and domestic collective trips, providing participants not only with relief from possible fees, but also the convenience an average burgher cannot do without* (…). *Meanwhile*

> *the office organizing trips provides, in advance, tolerable accommodation, prepares meal, and will eventually try to find carts, etc. Announcement of a special office brings great pleasure, and when the project becomes a reality, when the first trip is announced, we will come back to this case, even through the memory of magazine tradition, formerly par excellence of the travellers* [(ecki) 1892, p. 166].

Unfortunately, there was no continuation of that theme and it seems that in the end, the initiative was not carried out, however, agitation was not stopped. From time to time ,there were some calls in “The Wanderer” that presented achievements in this respect regarding the West:

> *Collective tours are completely ordinary abroad, organized with a certain plan, comfort, and above all, cheap. There are numerous travel offices there, competing with each other and announcing excursions in advance, worked out with meticulous precision. For a relatively small fee, anyone can select a desired route, and the office guarantees adequate food, conveniences, hotels etc.* [Tr. 1900, p. 492].

There was some hope while looking at steamship owners’ actions taken to organize trips for their clients. The routes were initialised in the Warsaw area, but with time, their new offer expanded in more distant directions. The editorial office of “The Wanderer” saw an opportunity for imminent creation of professional travel agencies in the actions of shipping companies:

> *It seems that there are entrepreneurs among us too, just because, so to say “a pleasure boat” set off to Plock. The expedition is going to stop in Bielany, Wyszogrod, Czerwinsk, etc. and will be back in couple of days full of fresh impressions.* (...) *In time, if the attempt is successful, of course, the board navigation will think about trips to further surroundings. This should induce involvement and combine the managements of railways, shipping on Neman river, etc. to, in advance, prepare wheeled vehicles, rooms at hotels, and think about travel participants to avoid leaving a person with the usually poorly stocked ship buffet. In this way, organized tours would be much more alluring*[9] [Tr. (1900), p. 492].

There was a huge utility of travel agencies. They not only organized foreign trips in detail, but also served as a source of knowledge, advice and basic information about tourist destinations and attractions. That situation was illustrated in the words of the author of the article titled “But where?”:

[9] Similar initiatives on the pages of the Warsaw’s weekly were mentioned many times. [For more information see: Ap. Ol-ski 1900, p. 612; “The Wanderer” 1900, No. 32, p. 631; K. W. 1901, p. 528; K. D. -S. 1900, p. 631].

If you were asking about a picturesque town worth seeing in Austria, Germany, Switzerland, Italy or France, I would send you to the travellers' offices and soon, you would receive the entire library of prospectuses gorgeously illustrated, containing even the smallest details referring to a chosen town [S. B. 1903, p. 414].

Hotels and gastronomy

The shortage of travel agencies offering a wide range of tourist services was not the only barrier inhibiting the possible development of tourism in Poland. Hotel accommodation deficiencies, lack of restaurants and topographic materials which allow to navigate in unfamiliar territories were also the real reasons for many who wanted to spend time actively on water trips, walking or wheeled journeys. Only the main cities, spas and tourist development places had quite varied offers of accommodation and gastronomy due to the prevailing fashion. Meanwhile, travelling on foot or by bike gave no hope for a comfortable bed and as such, dining in the outskirts of major cities and provinces. Tourists were effectively deterred by inevitable problems with accommodation and supply:

Because, ladies and gentlemen, how can you go e.g. to the Swietokrzyskie mountains (average resident of Warsaw knows the Tatra mountains, Kruszcowe mountains or possibly even the Alps better), if you have no other opportunity apart from spending the night on a tavern bench, or in a colonist rustic barn, when as all food is milk and eggs or cream and ... scrambled eggs, without taking into account "szpagatowka" vodka, a herring and old bagels-these stereotyped specialties of each one country inn? [(ecki) 1892, p. 166].

On Polish lands, unfortunately much

worse things than transportation is staying in our small towns and villages. The hotel industry is as expanded there as on the deserts of Arabia. In this situation, the Polish tourist cannot feel secure from starvation or disease caused by discomfort; and about the body cleanliness – it is necessary to completely forget about it, at least until it comes to ... the province's city [F.S. 1880, pp. 88-89].

Over the years, the situation is still similarly depicted. In 1900, one of the walker tourists described his experience in following words:

When I walked this tour, along the whole road I found with difficulty just a little milk in a hut. So it is hard to require, on the other hand, that anyone coming from far with hunger, without any availability of accommodation, go on longer hiking trips ["The Wanderer" 1900, No. 29, p. 573].

Great hotels could be found in attractive tourist regions or in big cities connected by railway lines: *in any place in the country, every passenger has to spend the night sleeping, because at night, no one travels: "drop in and stay with me", this is a generic term, so everyone gladly stays and rarely regret it* [*Hotels of Switzerland* 1877, p. 342]. In this regard, Switzerland has much to offer. Hotel infrastructure extension and implemented gastronomic service were connected with the fact that in the second half of the 19th century, (…) *no other country in Europe was so many sightseeing as Swiss* (...) [Ibid], so the entrepreneurs working in the country were obliged to (...) *prepare exquisite reception to many of their guests whether in a lonely valley or on towering mountains wherever they are going to stop* [Ibid]. The equipment, service and prices were spoken about in superlatives regarding places where there were no prohibitive costs because expanded competition in the industry stabilized them. There was only one remark, but not a real complaint, in this consideration related to serving meals as a table d'hôte. According to the author of the article "Hotels of Switzerland", by this form of serving meals, an individualized approach to guests was precluded, because not only the menu was imposed, but also the time of a meal. However, there was a number of advantages in

> *table d'hôte service*: *Well-understood interests of the hotel owner requires, at a special time and at a predetermined price, to have number of guests gathered and fed at a common table. This reduces service, saves fuel, uses prepared stocks in the best way and makes account the easiest and most reliable; moreover, the guest can be served at a relatively low cost* [Ibid].

If someone wanted to eat at a different time, after paying extra charge, s/he could: (...) *by paying usually 2 francs more than the "table d'hôte" price, getting nothing more for it* [Ibid]. There were a lot of complaints about the menu – written in French – which was little varied and the food was not very good:

> (...) *haricots verts, which often taste like rotten hay.* (...) *Coffee* (...) *should be avoided as it does not correspond to even the most modest expectations* (...), *water and bread in Switzerland leave much to be desired. There is no fresh water in hotels located by the lakes and during hot weather, it is impossible to drink it without ice if you want to make it a little bit more bearable. Bread deserves even more serious accusations* [Ibid, p. 343].

Heaving meals was much more recommended in small villages, prepared by simple housekeepers: *There were only four tourists and the food tasted great for every one of us ... (...) for the abundant dishes we ate, the housekeeper only demanded– seven francs* (...) [Ibid p. 344].

In the hotels operated on Polish lands, the service form *table d'hôte* was not yet widespread. *A host hotel accommodates the guest here – in Switzer-*

land, a guest is forced to apply existing home manners. (...) *Our cuisines, whether in restaurants or hotels, profess complete freedom of individual taste; hence, there is a great selection of food even in secondary or tertiary hotels* [Ibid p. 343].

Paris was making a big impression in terms of the number of hotels and catering businesses: *There are up to five thousand different hotels, restaurants, cafes and greasy-spoons in the capital of France* [*Practical tips for going on a universal exhibition in Paris* 1867, No. 232, p. 384]. Hotel room standards (...) *can vary ranging from well-furnished offering the greatest comfort, glittering with gold and as expensive sd gold, up to dirty one, on dark streets, located in taverns, which still also dare to call themselves a "hotel"* [Ibid]. The undoubtable advantage of high-standard hotels was service speaking in several languages: (...) *in the more prominent hotels, the staff speaks different languages* (...) [Ibid, No. 230, p. 348].

But also in France, access to comfortable hotels and refreshments depended on the place. The capital of the country appears to be unique in this regard:

> *Do not think, curious wanderer, that on French iron railways, as on those German, at each stop, you will find refection* (...). *Buffets are located only at the main stations, and quite often, they are so far away and so hidden that taking advantage of them can be called an illusion* [Ibid, No. 323, 384].

In the United States of America, travellers' life is organised in a different way in this regard: *Railways and hotels are two starting points of economic and civilizational development of any area* [S.A.-W. 1900, p. 276].

Fig. 4. "Metropolitan Hotel" in New York.
Source: "The Wanderer," 1866, No. 169, p. 208.

Therefore, America is considered to be "the homeland of hotels "(...) *where these structures reach up in terms of area, height, comfort and unprecedented luxury, unusual size* [Ibid]. Along the railway line in Florida, several fantastic hotels were built. All of them belonged to the same entrepreneur who started a hotel business thinking about his friends from New York who could here (...) *find a fun time and the entertainment of summer while residing there in winter* [Ibid].

One of the largest hotels in the world was built in New York at the beginning of the 2nd half of the 19th century, (Fig. 4): *This is undeniably one of the greatest hotels in the world, built extremely luxuriously and containing everything that the fanciest comfort for convenience managed to invent so far* [*"Metropolitan Hotel" in New York* 1866, p. 208]. The hotel service comprised of 450 employees, who were to meet all the wishes of visitors who came there. All rooms and apartments were (...) *richly lighted and very beautifully furnished* [Ibid].

The tourist

At the beginning of the 20th century, the tourist became a typical element of landscape, recognizable and not arousing surprise, an equal rights member of the social kaleidoscope: A *typical tourist in a checked suit with a fabric umbrella and red Baedeker guide is no longer a singularity today* (...) [S.A.-W. 1900, p. 276]. Before that happened, every traveller caused surprise and curiosity combined with some sensation: *A man, who was in America at that time, even in the greatest cities, caused extraordinary sensation, and people stood on the streets to watch him* [*Office for Cook's travelers* 1877, p. 214].

Fig. 5. A walking tourist.
Source: "The Wanderer" 1894, No. 17, p. 324.

By far, the dominant group of travellers in Europe were the Englishmen. They stood out from the crowd of the other tourists and most attention was devoted to them by editorial office of "The Wanderer". The English tourists were divided by the editors into two major groups. The first one was the "trite tourists" - "elegante Völkerwanderung" - "spleen eccentrics", and among women, the hoity-toity "Ms.

with guides in hand" – (…), *where a casual traveller cares mainly about a comfortable railcar, soft hotel bed, table d'hôte and possesses every country* [Anybody 1891, p. 260]. The second group consisted of tourists (Fig. 5), (...) *that journey's inconvenience does not scare and for whom travel is no longer an ordinary boring toy. Those who are educated and taught by travels* (...) *improve their power, provide them with health* [Ibid]. This typology could be applied to any nationality, although in the second half of the 19th century, attention was focused mainly on English tourists for various reasons. "The Wanderer" editors formulated one of these reasons as: *No nation has such a strong passion for travelling like the English* (...) [*The latest English travels* 1883, p. 493]. *Besides, travelling is a fashion for the English* (...) [*Office for Cook's travelers* 1877, p. 215]. The number of British tourists travelling around Europe had to be impressive: (…) *you can see so many of them everywhere that you could even say the European nature is also too British.* [Arona 1872, p. 233]. This opinion was repeatedlyconfirmed in "The Wanderer": *If you travel around Europe, you cannot fail to meet an Englishman* [Ibid].

Fig. 6. Hikers.
Source: "The Wanderer" 1902, No. 31, p. 607.

Unfortunately, their popularity was a merit of the not very positive image they earned while travelling around the world. There are such descriptions on the pages of Warsaw's weekly magazine:

> (...) *travelling Englishmen are characterized by conceit, selfishness, they are so impertinent,* (...). *At hotels or museums, they talk loudly, pocket some privileges, take the best sets, they push though crowds of through women, enter and leave without tipping their hat, they seem to not notice that there is someone else apart from them* [Ibid, p. 233- 234].

These kind of tourists (...) *quickly became fed up and bored* (...) [*Travel and natural phenomena* 1868, p. 192], they were looking for more comfort, and to a lesser extent, they were interested in visiting the places which, although attractive, were not adequately adapted for developing tourism. This palpable annoyance, due to the large group of English tourists (Fig.

6), which who pleasure indulged in vain travels, resulted also from the fact they needed to publish their impressions from trips even though there was no value, neither literary nor scientific:

> *There is no other nation who has such a strong passion for traveling as the English do, and apart from that, they also have the most developed touring department in literature. (...) Unfortunately, the number does not represent the value, the reason for that is almost half of the British tourists recruits not from a group of researchers who spend time on studying their science, but from higher social positions, of the chosen rich ones, who do not have anything else to do and any other idea how to spend their money, so they travel to pass the time and to have some satisfaction from a national sense of eccentricity* [*The latest English travels* 1883, p. 493].

This is not a very flattering sketch, although quite well widespread, it did not overshadow the glorious exceptions mentioned in the "The Wanderer" [*Travel and natural phenomena* 1868, p. 192; Anybody 1891, p. 260].

But British tourists had to compete with the American ones for pole position on the emerging tourist market:

> *The English are not the most travelling nation on earth. The average European, running around his tiny part of the world cannot compete with an American, whose vast homeland, crisscrossed by thousands of miles long rail networks, allows his luxuriant nature to be satisfied by the variable impressions of different zones and climates* [S.A.-W. 1900, p. 276].

Passion for travel, especially in the summer season, was not only a domain of affluent parts of the American society (...) *but many others like even artisans and small traders working very earnestly and living sparingly throughout the year only to be able to travel during the summer for a few weeks time* [*American travelmania* 1866, p. 255].

Polish tourists also paid attention to themselves, unfortunately, not because of the positive attributes. One of the associates of the weekly, during his stay abroad in Hungary, made an interesting observation in a restaurant at a "watering place":

Fig. 7. A walking tourist (Walter Lodian – an American engineer who came from Vladivostok to Warsaw).

Source: "The Wanderer" 1898, No. 6, p. 114.

> *Poles in a foreign country, at a watering place, are easily recognisable.* (...) *Among the guests filling the*

room, there were between ten to twenty Poles. Even if you do not hear their conversations, they can be easily recognised: they differ in impatience. They call for the servant who cannot be 'divided into two. Germans, Hungarians, Czechs sit quietly and await their turn [Toporski 1903, p. 745-746].

Trying to somewhat justify such ribald behaviour, the author pays attention to the following behavioural traits of Polish tourists, which could be counted as an advantage, not a disadvantage by this time:

Poles are coming to a restaurant to have a meal but a abroad pub is a place for spending time; that is why Poles are trying to leave the place to eat as soon as possible, in which Germans try to stay as long as it is possible [Ibid].

It would not have any importance for the owners how long people sit at a restaurant table, if that would be associated with proportionally abundant orders. But unfortunately, these ratios did not often positively correlate with each other. In Switzerland gladly visited by tourists, there was a problem with guests who spent hours in the hotel restaurants, making only one modest order*: travellers frequently come in by the evening train, especially, there are the English, and they spend hours having nothing more than soup* [*Hotels of Switzerland* 1877, p. 343].

Travelling had beneficial effects on everyone, and this particular advantage was emphasized by the editors of "The Wanderer", also pointing out that much more interest brought about moving from place to place rather than lazing around during a "villeggiatura":

(...) *perhaps we must admit that if someone has power and money, s/he will spend time far healthier and more pleasantly, and instead of blissful vegetation in only one place, will go for a hike (not necessarily a walk), and avoiding wearines, will get to know a bigger piece of the world and more people* (...) [F.S. 1880, p. 88].

Fig. 8. Hikers: Gustav Maroit and L. Peyramont.

Source: "The Wanderer" 1891, No. 18, p. 265.

Hikers (Fig. 7 and 8) were sensational at least during the initial phase of developing this form of activity. Its amateurs were called eccentric. They arouse great interest among others and great astonishment, (...) *while humanity strives to devise the most comfortable means of transport, as though by contrast, it develops a particular sport using the most primordial way of movement, it is "per pedes apostolorum"* [(!) 1891 , p. 264]. Disbelief and admiration aroused motivation for undertaking such efforts: *Without a bet, nor to show off, but only due to passion for the sport* of *walking* (...) [Ibid, p. 265].

"The gentle sex" was also showing predilection to hiking. There was an article published in "The Wanderer" about a new custom practiced in Norway by young maidens which (...) *were going in groups, hiking around the country, like real tourists - on foot, with luggage on their backs, and often spending several days outside the home, visiting* (...) *areas* (...) [*The Traveler* 1897, p. 134].

Fig. 9. Humour: "In the Mountains".
Source: "The Wanderer" in 1888, No. 36, p. 432.

Fig. 10. The humour:
Source: "The Wanderer", 1899, No. 26, p. 520.

The fashion for hiking in Polish society slowly acquired enthusiasts[10]. People were willingly interested in doings of the Americans, French, English and Norwegians watching them from a distance, as an extraordinary spectacle, combined with extravagance and originality. Our approach to hiking has been presented by the editors of "The Wanderer" in humorous scenes. One of them presented two gentlemen who climbed to the top of a mountain where they chatted about the effort they had made (Fig. 9): – *Just look what a beautiful view from here! Do you not think it was worth toiling to get*

[10] Mieczyslaw Orłowicz recalled the attitude of Poles towards hiking, which at the beginning of the 20th century, was quite common: *Nobody practiced hiking on Polish lands at that time, and hiking was all in bad taste. But in the Czech Republic, such trips were in fashion. I was surprised at how pleasing it was for me. I went back in 1903 to Galicia as an enthusiast and promoter of hiking* [Orłowicz 1970, p. 5].

here and see the whole beautiful valley? – Oh my God! What is the sense in climbing so high just to see how beautiful it is down here from up there!... [*In the mountains* 1888, p. 432]. In a similar way, a conversation was presented between two mountain tourists, a man and a woman;the female tourist with enthusiasm and energy, despite the passed hardships, was admiring the beauty of the landscape,meanwhile her comrade wiping sweat from his forehead fell enervated at her feet (Fig. 10): – *What a beautiful view – I am going into raptures from it, and you uncle? – I am going into raptures from exhaustion* ["The Wanderer" 1899, No. 26, p. 520]. Slight consternation may be aroused by the scene, as the comely female tourists usually went to Zakopane for the summer holiday to (...) *admire the snow-capped mountain peaks in perspective* (...) [Anybody 1891, p. 260].

The tourist outfit

In the context of feminine tourism, it is worth saying something about the attire of that time. At the beginning, only a few were so courageous to break the fashion conventions and wear "sinful" dresses that guaranteed greater comfort and improved safety during tourist trips. Some attention was paid to women's clothing used during the mountain expeditions in "The Wanderer".. Reaching the peaks, "corsets and hats" (Fig. 12), were already presented as a grotesque and arousing astonishment: (…) *our ladies, even in the mountains, do not liberate themselves from the fashion pillory what looks more comic when obviously their costumes are sometimes in a decrepit state* [Karłowicz 1895, p. 128]. At the end of the 19th century, the matter of appropriate sportswear for women was increasingly discussed. In magazines, suitable women's sport costume styles were presented, which also could be used for tourism purposes. One of the proposals the editors of "The Wanderer" presented on the magazine's pages were models of a German hygienist Sonder, manufactured by Hesse in Munich. Among them, there was attire for mountain trips (Fig. 11). It consisted of a little hat with a narrow brim, dress ending above an ankle, lace-up shoes and an alpine stick.

Fig. 11. Mountain trip attire.
Source: "The Wanderer" 1896, No. 44, p. 349.

Fig. 12. Casual attire for travel and for going into the city.
Source: "The Wanderer" 1896, No. 44, p. 349.

Fig. 13. M. Dowie in traveler attire.
Source: "The Wanderer" 1891, No. 18, p. 260.

According to the author of the text, a mountain-climber dressed like that could feel (...) *already the safest on a mountain hike* [*Kostyum alternating for women* 1896, p. 349]. At that time, the extremely original and bold wardrobe of the famous British tourist Mena Muriel Dowie was presented (Fig. 13). Her travelling attire consisted of narrow, tailored pants and a jacket, over—the-knee high boots and a neat beret [Anybody 1891, p. 260].

Luggage

If someone was planning a journey, and especially a stay away from home that would last for a longer time, they had to bring properly equipped luggage. A number of tips about its content were also given in "The Wanderer". Specific needs in this aspect were presented by travelling ladies. Without necessary equipment, in their opinion, rest could not go about properly. The necessary accessory of an "average holiday-maker", was mentioned in a letter to her husband, asking him to deliver it to the place of "villeggiatura":

> (…) *half a dram of pins, a pound of powder, gelatin, blue crevel, buttons, twenty-six cubits of cretonne, black and white thread No. 40, sugar, coffee, tea, chocolate, travel canvas bag, cloves, chicory, a big ball of cotton, two Rigollot papers,*

needles, a dozen glasses, because all of the previous ones had been broken, about six cauliflowers, mustard, my navy blue dress, Johnny's baby-shoes, an umbrella for Mary, half a pound of starch, Cologne for one ruble, a package of ultramarine, a sewing machine, a blanket, biscuits, an iron bed, pink muslin for Mary behind the Iron Gate, about four cubits of gauze, a large samovar and if it not much of an inconvenience, then take the ash wardrobe from the children's room with you, because I cannot cram all the clothes into the one here. But the rest can be brought on your second triptime [(.) 1982, p. 455].

In this regard, luggage for travelling America was presented amazingly: *because travellers usually carry very few pieces of luggage (Americans often do not have it at all)* (...) [Simoniu 1869, p. 195].

You could find a number of objective and practical pieces of advice in "The Wanderer" for tourists planning to go to France in relation to the contents of luggage and the necessary documents while crossing the border. The author of the article "Practical tips for going on the universal exhibition in Paris" focused not so much on the objects that a traveller should bring as he warned against those which certainly should not be found in the tourist's suitcase for various reasons. Among them, there were newspapers and some books.

> (...) *in France, foreign journals are strictly prohibited and regard as contraband* (...). *Also you cannot carry books speaking ill of today's French government in a suitcase; confiscation is the smallest of the unpleasantries one would be faced with, in other cases, such situations can get a traveller into trouble* [*Practical tips for going on a universal exhibition in Paris* 1867, No. 230, p. 348].

The catalogue of forbidden things included likewise, tobacco and cigars – (...) *In France, these articles were treat-*

Fig. 14. Humour: "Various types of tourists" – Our health requires change in place. – Our funds allow us to travel.

Source: "The Wanderer" 1866, No. 179, pp. 368.

ed as regalia (…) *You need to buy cigars at the local market or if you are taking them from home, you have to declare them at custom chambers and pay theduty* (...) [Ibid].

Information about passports and other documents that are necessary while crossing the border were very important for the magazine's readers. To visit France, it was not necessaryto have a passport

> (...) *visas issued by the French embassy of the country from which the traveller is arriving was enough* (...). *Today there are no papers of legitimacy requested confirming identity* (...) [but] *it is always good to have one anyway; particularly because having granted access to visit some interesting places often depends on papers* (...) [Ibid].

Especially when access to the most interesting facilities was free for charges: (...) *the Louvre museum, Luxembourg, the Cluny Hotel, Versailles, castles and temples, aqueducts and beautiful gardens, Jardin des Plantes, in other words, all that is rare and uncommon and what has to be paid for dearly in other places* (...) [Ibid].

The law regulations of the partitioning powers had impact on the trip number to countries abroad in the Polish society during the era of The Partitions had. Crossing borders between individual partitions was difficult. This aspect certainly inhibited tourist traffic within the divided land of the Polish territory. Because of the formal onerousness, residents of Wielkopolska, willingly chose spas of Silesia rather than Galicia [Kozłowska-Szczęsna 2000, p. 7][11]. Also, the Russian Partition residents were complaining about unpleasant passport formalities at the border and passport charges [Siwek 2012, p. 197; Olkuśnik 2013, p. 192]. In "The Wanderer", press notes informing readers about the plans of passport regulation changes for traveling abroad: *As regards passports, the price will be the same, but the new passports* have appeared: [they] *will allow to cross the border and come back as many times as you like (but only once today)* [*New passport Act* 1905, p. 729; *Foreign Passports* 1905, p. 769].

The author of the article "Practical tips for going on the universal exhibition in Paris" intended to prepare something like the "ten tourist commandments" - but eventually, he decided to postpone its implementation to a more opportune time. For the purposes of the above-mentioned publication, he prepared some valuable tips. The following one could be found among them:*Take twiceas much money with you than you are going to spend – and even something more* [*Practical tips for going on the universal exhibition in Paris* 1867, No. 230, p. 348]. Even today, this precious advice is still topical.

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[11] More on repression, which the Polish youth was subjected to under Prussian occupation for trips to Cracow and its surroundings, including the Tatras [See: Chrzanowski 1931, p. 142].

Among the necessary tourist accessories, appropriate professional literature describing the area of interest and maps should also be found:

> *However, to take advantage of foot travels, you need to know the way very well, the distance between the villages, the land's topography... all this can be taught only by a good geographical atlas, accurate, good sized maps with a lot of pages, and on each page - a lot of, as much as possible, strictly named cities, towns, settlements, villages and hamlets, even the smallest ones. So far, our literature does not have such a geographical atlas* (...) ["The Wanderer" 1894, No. 17, p. 324].

Unfortunately, for Polish tourists, such equipment remained only far away in the realm of wishful thinking and dreams. This gap was intended to be filled by the editors of "The Wanderer" through publishing the announcement:

> (...) *of the great geographical atlas which will include over 120 "in folio" size boards reflected very clearly, and provided with familiar subtitles of every village. Apart from the charts, the atlas will also contain a list of all the names marked on maps; each name will be accompanied by a properly aligned numerical tip that will help the reader to instantly find the searched village on the map. There will be over a million such names on the list* (...) ["The Wanderer" 1894, No. 17, p. 324][12].

The summary

The initial phase of the mass tourism development described on the pages of the Warsaw's weekly "The Wanderer", was presented extremely vividly. Analysis of the content of the weekly allowed to add another building block to the deeper understanding of the origins and development of tourism, not only in Polish lands. The editorial staff of the magazine was very interested in and carefully reported the novelties related to the development of tourism in some European countries, such as: England, Switzerland, France or distant and exotic ones like the United States of America. These tidings became a valuable source of information for potential visitors to the featured regions. They were also inspirations for imitating and applying proven solutions to the native basis (e.g. setting up travel agencies). For 44 years, with different intensities, the editorial of "The Wonderer" took on topics related to tourism. Nonetheless, the publications in its columns have helped to reconstruct the image of the conditions and problems associated with the development of tourism in different regions of the world, which this thesis is trying to point out.

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[12] More on the said initiative was also written a few months later [See: B. A. 1894, p. 784].

The range of undertaken topics was diverse and complex, and at the same time, within the context of tourism interest. The reader of “The Wonderer” received the necessary knowledge in the field of transportation, accommodation, food, tourist information and travel organization.

During a period of less than half of a century, while the weekly existed on the press market, “The Wanderer’s” editorial office managed to capture the changes in travel conditions. The change from the so-called “highlander’s trolley” to the railroad car not only greatly improved the comfort of travelling inside the vehicle. The journey time was shortened, the fall and spring whimsical weather did not in any way nuisance travellers, and the summer dust could not get to them. The tourist was no longer a “travel martyr”, which aroused sensations and amazement among the inhabitants of the visiting area. Moreover, the increasing popularity of tourist activity made it no longer restricted only to males, but also women0 who had been buried in household chores started to pave the way to it. Love for tourism as a fashionable way of spending leisure time has led to revolutionary changes in women’s clothing. The 19th century corsets, hats and trailing gowns gave up their place for more comfortable clothing, adapted to the toils of travel.

The political and economic conditions of the regions certainly had prime importance in pioneering and setting up tourist flow and routes to make the world a better place for rest and to relax. Warsaw’s illustrated weekly proved to be a valuable and engaged “witness” in the emerging and developing tourist traffic. Its role in promoting interest in tourism was understood by the editorial office of “The Wonderer as not only being an observer of the described phenomena. It often undertook activities aimed at creating new opportunities that influenced the development and promotion of this form of activity.

In the current literature, attention has been paid to the special role played by “The Wonderer’s” editorial board in the ideological changes of literature, art and art criticism, which took place in the second half of the 19th century on Polish lands. Analysis of the collected material for the purpose of this paper suggests that it also played a similar role in the field of tourism.

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TURYSTYKA JAKO NOWA FORMA SPĘDZANIA CZASU WOLNEGO W ŚWIETLE „WĘDROWCA" (1863-1906)

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Abstrakt

Cel. Próba identyfikacji „Wędrowca" jako źródła wiedzy o dziejach turystyki oraz podejścia redakcji do omawianej tematyki.
Metoda. Badaniem objęto materiał związany z rozwojem i popularyzacją turystyki, publikowany w badanym czasopiśmie na przestrzeni 44 lat jego ukazywania się. W okresie od 1863 r. do 1906 r. ukazało się 2289 numerów. Zastosowana została metodologia historyczna.
Wyniki. Analiza materiału źródłowego pozwoliła stwierdzić, że warszawski tygodnik ilustrowany „Wędrowiec" okazał się być wartościowym i zaangażowanym „świadkiem" rodzącego i rozwijającego się ruchu turystycznego. Przez 44 lata z różnym natężeniem podejmował ten temat. Niemniej jednak publikacje zamieszczane na jego łamach pozwoliły odtworzyć obraz warunków i problemów związanych z rozwojem ruchu turystycznego w omawianym okrersie.
Ograniczenia badań i wniosków. Wnioski oparto na analizie zebranego materiału źródłowego. Ciekawym ich dopełnieniem byłoby porównanie zebranego materiału z pozostałą zawartością czasopisma (jak wskazano w artykule, tematyka związana z turystyką tatrzańską stanowiła jedynie niewielki ułamek prezentowanych zagadnień w badanym czasopiśmie).
Implikacje praktyczne. Wnioski z analizy zebranego materiału w sposób istotny wzbogacają dotychczasową wiedzę na temat dziejów turystyki z drugiej połowy XIX wieku oraz początków XX wieku.
Oryginalność pracy. Ujęcie tematu z perspektywy specjalistycznego czasopisma jakim był "Wędrowiec" oraz analiza materiału źródłowego, zgromadzonego w przedmiotowym tygodniku, który dotychczas nie doczekał się opracowania w kontekście wpływu jaki mógł wywrzeć na rozwój i promocję turystyki w społeczeństwie polskim w drugiej połowie XIX wieku oraz na początku XX wieku.
Rodzaj pracy. Artykuł monograficzny.

Słowa kluczowe: „Wędrowiec", historia turystyki.

INFORMATION AND INSTRUCTIONS FOR AUTHORS

GENERAL INFORMATION FOR AUTHORS PREPARING ACADEMIC ARTICLES

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Instruction for Authors Preparing Academic Articles

I. PREPARING TEXT

1. The volume of submitted papers should not exceed 20 pages of normalized manuscript, i.e., 40,000 characters (one author's sheet).
2. Text files should be created in the Word 6.0–XP editor in DOC format.
3. Page setup:
   – paper size: A4;
   – margins: all margins 2.5 cm;
   – line spacing: 1.5.
4. Title: use 14-point Times New Roman font, bold. Capitalize the entire title. Insert a 14-point line of space following the title.
5. Abstract in English: between 1500 and 2000 characters (including spaces); use 10-point Times New Roman font.
6. The abstract should comprise the following, clearly separated (presented in the form of a list) parts:
   – Puropse.
   – Method.
   – Findings.
   – Research and conclusions limitations: comment on the representativeness of your research and its potential limitations due to cultural, environmental, geographical, or other conditions.
   – Practical implications.
   – Originality: describe how your research (results and opinions) differs from other publications on the subject.
   – Type of paper: specify whether your article presents empirical research or theoretical
   – concepts or whether it is a review, a case study, etc.
7. Key words: 3-6. Insert a 12-point line of space following the key words.
8. The paper should include elements listed below. Titles of elements may be changed if justified by content. Furthermore, especially in the case of review articles, the paper may have a more complex structure, i.e., it may comprise more elements or have a given element subdivided further (such as the Literature Review section).
   A) For empirical papers:
      – **Introduction** (subject of research, aim of the article, and justification of the aim),
      – **Literature review** (a review of Polish and foreign publications presenting the aim of the article and describing current knowledge on the subject matter),
      – **Method** (aim of empirical research, research hypotheses and questions, and a description of methodology and how the research was conducted)
      – **Results** (research results, including the answers to the research hypotheses and questions),
      – **Discussion** (a discussion of the study results in view of results obtained by other authors in Polish and foreign publications on the subject matter),
      – **Conclusions** (conclusions from the study results and their discussion, including practical implications and suggested directions for further research on the subject),
      – **References**.
   B) For review papers:
      – **Introduction** (subject of research, aim of the article, and justification of the aim),
      – **Literature review** (a review of Polish and foreign publications related to the aim of the article describing current knowledge on the subject matter),
      – **Discussion** (a discussion of current knowledge on the subject matter, including critical analysis based on Polish and foreign publications),
      – **Conclusions** (conclusions from the discussion, including its practical implications and suggested directions for further research on the subject),
      – **References**.

9. Headings of each part of the paper: use 12-point Times New Roman font, bold, centered. Number the parts with Arabic numerals. Insert a 12-point line of space following each heading.
10. Running text: use 12-point Times New Roman font and 1.5 line spacing. First line indent: 1 cm. Use tools available in the editor to format the text rather than the space bar, as using space bar makes markup and typesetting difficult.
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12. Use an en dash (–) to indicate breaks in a sentence and between numbers that denote close values not provided precisely (such as time periods); do not use a hyphen (-) or an em dash (—). Examples of use:
    - “Secondly – as tradition dictates – every student should wear formal attire tomorrow”.
    - “The years 1914–1918, or the times of World War I, is an extremely important period in the history of Europe”.
    - “Relevant information can found on pages 12–24 of the aforementioned publication”.
    - Most waters in the area of Wysowa belong to the sodium-bicarbonate type and have a high concentration of carbon dioxide.
13. Footnotes can be used (sparingly) to complement the running text: use 10-point Times New Roman font with 1.0 line spacing.
14. References in the running text should be formatted according to the Harvard System (i.e., provide the last name of the author of the quoted or referenced publication, the year of publication, and the page or pages you refer to in square brackets within the running text). Do not place a comma between the name and the year. If two or more publications are referenced in the same parentheses, separate them with a semicolon.
15. The References section, located at the end of the article, should only include texts that are quoted or referred to in the article. References should be given in an alphabetical order with full bibliographic descriptions. Guidelines for and examples of bibliographic descriptions can be found in Part III of these instructions.

II. PREPARING TABLES AND ILLUSTRATIONS

1. Tables and illustrations (figures, charts, and photographs) should be included in separate files and described in detail. Mark their locations in the running text through centered titles, as in the example below:

Tab. 1. Tourist activity inhibitors
Tabela 1. Inhibitory aktywności turystycznej

2. The entire article should use the division into tables and figures (i.e., everything that is not a table, e.g. charts, diagrams, or photographs, is considered a figure). Refer to figures in the abbreviated form (“Fig.”).
3. Place titles of tables above tables, and titles of figures below figures.
4. Write the titles of tables and figures in 10-point Times New Roman font.
5. Under each table/figure provide its source (using 10-point Times New Roman font).
6. Figures should be scanned at a resolution no lower than 300 DPI (optimal resolution is 600 DPI) and saved as line art files in TIFF format.
7. Charts should be created in black. Gray tints or textures are allowed.
8. Digital photographs should be saved in TIFF or JPEG format at full resolution. Do not use compression.
9. If the article includes figures, tables, etc. taken from other academic papers, the author is obliged to obtain a reprinting permission. The permission should be sent to the Editorial Office together with the article and other attachments.

III. PREPARING THE REFERENCES SECTION

1. The References section, located at the end of the article, should only include texts that are quoted or referred to in the article. References should be given in an alphabetical order with full bibliographic descriptions.
2. References to papers of different types should be prepared to according to the guidelines below. Note that all references should be provided in a single list (the division into types, found below, is meant only to provide examples of referencing different sources).
3. For two or more papers written by the same author and published in the same year, add subsequent lowercase letters to the year, as in: (2014a), (2014b), etc.
4. List Internet sources (webpages) for which the appropriate elements of a full bibliographic description cannot be provided in a separate Internet Sources section. The list should provide URL addresses of the referenced webpages in alphabetical order, described as in the following sample:
   – http://www.unwto.org/facts/eng/vision.htm (08.09.2014).
5. For articles to be published in the English issues of the Journal, provide English translations of the titles of non-English publications (in square brackets), as in the following sample:
   – Winiarski, R., Zdebski, J. (2008), *Psychologia turystyki* [*Psychology of Tourism*], Wydawnictwa Akademickie i Profesjonalne, Warszawa.

Sample references to different types of papers in the References section

A. Books:

Urry J. (2001), *The tourist gaze*, Sage, London.
McIntosh R.W., Goeldner Ch.R. (1986), *Tourism. Principles, Practices, Philosophies*, John Wiley & Sons, New York.

B. Edited books and joint publications:

Ryan C., ed., (2003), *The Tourist Experience*, Continuum, London.
Alejziak W., Winiarski R., eds. (2005), *Tourism in Scientific Research*, AWF Krakow, WSIZ Rzeszow, Krakow-Rzeszow.

C. Chapters in edited books and joint publications:

Dann G.M.S. (2002), *Theoretical issues for tourism's future development*, [in:] Pearce D.G., Butler R.W., eds., *Contemporary Issues in Tourism Development*, Routledge Advances in Tourism, International Academy for the Study of Tourism, London, New York, pp. 13-30.

D. Articles in scientific journals:

Cohen E. (1979), *A Phenomenology of Tourism Experiences*, „Sociology", Vol. 13, pp. 179–201.
Szczechowicz B. (2012), *The importance of attributes related to physical activity for the tourism product's utility*, „Journal of Sport & Tourism", Vol. 18 (3), pp. 225–249.

E. Articles in trade magazines and trade newspapers:

Benefits tourism not OK (2014), [in:] „The Economist", Nov 15th.

F. Papers without a stated authorship, including research reports and statistical yearbooks:

Tourism Trends for Europe (2006), European Travel Commission.
Tourism Highlights. 2010 Edition (2011), UNWTO.

G. Legal acts:

Act on Tourism Services, of 29 August 1997, Dz.U. of 2004, No. 223, item 2268, as amended.

H. Publications available on the Internet:

International tourism on track to end 2014 with record numbers, http://media.unwto.org/press-release/2014-12-18/international-tourism-track-end-2014-record-numbers (20.12.2014).

GENERAL INFORMATION FOR AUTHORS PREPARING ACADEMIC REVIEWS AND POLEMICS

1. Only original reviews of Polish and foreign monographs, academic articles, and handbooks, as well as other types of academic and didactic papers, such as research reports, doctoral theses, and habilitation theses, will be accepted for publication.
2. The Journal publishes reviews of papers on the theory of tourism, as well as papers that address tourism from the viewpoint of cultural anthropology, philosophy, sociology, geography, law, psychology, economics, management, marketing, and other academic fields and disciplines.
3. Submitting a paper for publication is construed as transferring the copyright to the Editorial Office. This means that neither the review nor a part of it can be published in other journals or digital media without the Editorial Office's written permission.
4. The article should be prepared according to the **"Instructions for authors preparing academic reviews and polemics"**, found below. Otherwise, the article will be sent back to the Author(s) for correction.
5. The review should be submitted to the Editorial Office's e-mail address: folia.turistica@awf.krakow.pl.
6. The Editorial Team reserves the right to modify the style makeup of submitted reviews.
7. The Author of the review will receive an electronic version of the Journal issue in which the review was published, free of charge.

Instruction for Authors Preparing Academic Reviews and Polemics

1. Text files should be created in the Word 6.0–XP editor in DOC format.
2. Page setup:
   - paper size: A4;
   - margins: all margins 2.5 cm;
   - line spacing: 1.5.
3. Name of each Author: use 12-point Times New Roman font, bold. Insert a 12-point line of space following the name(s).
4. Provide each Author's academic degree or title, affiliation (i.e. name of the institution represented by the Author, in this order: university, faculty, department, etc.), phone number, and e-mail in a footnote. Footnote formatting: use 10-point Times New Roman font and 1.0 line spacing.
5. Samples of title formatting:
   1. REVIEW OF "INTERNATIONAL TOURIST ORGANIZATIONS" BY WIESŁAW ALEJZIAK AND TOMASZ MARCINIEC.
   2. AN OPINION ABOUT "POLAND'S MARKETING STRATEGY IN THE TOURISM SECTOR FOR 2012–2020".
   3. RESPONSE TO THE OPINION…

   etc.
6. Title: use 14-point Times New Roman font, bold. Capitalize the entire title. Below the title, provide a full bibliographic reference for your article, including ISBN and the date of submission to the Editorial Board.
7. Format the titles of responses to reviews or other forms of academic polemics according to the guidelines above (e.g. Response to the Opinion…).
8. Insert a 14-point line of space following the title.
9. Headings of each part of the review (if appropriate): use 12-point Times New Roman font, bold, centered. Number the parts with Arabic numerals. Insert a 12-point line of space following each heading.

10. Running text: use 12-point Times New Roman font and 1.5 line spacing. First line indent: 1 cm. Use tools available in the editor to format the text rather than the space bar, as using space bar makes markup and typesetting difficult.
11. Do not use the bold face, capitals, and underlining in the text. Italics should only be used for titles listed in the footnotes and the References section and for letter symbols in the running text. Insert a space after punctuation marks, not before them.
12. Use an en dash (–) to indicate breaks in a sentence and between numbers that denote close values not provided precisely (such as time periods); do not use a hyphen (-) or an em dash (—). Examples of use:
    - "Secondly – as tradition dictates – every student should wear formal attire tomorrow".
    - "The years 1914–1918, or the times of World War I, is an extremely important period
    - in the history of Europe".
    - "Relevant information can found on pages 12–24 of the aforementioned publication".
    - "Most waters in the area of Wysowa belong to the sodium-bicarbonate type and have a high concentration of carbon dioxide".
13. Footnotes can be used (sparingly) to complement the running text: use 10-point Times New Roman font with 1.0 line spacing.
14. Illustrative materials (tables and figures) should be formatted according to the same guidelines as academic articles (see **"Instructions for authors preparing academic articles"**).
15. References in the running text should be formatted according to the Harvard System (i.e., provide the last name of the quoted or referenced publication, the year of publication, and the page or pages you refer to in square brackets within the running text. Do not place a comma between the name and the year. If two or more publications are referenced in the same parentheses, separate them with a semicolon.
16. The References section, located at the end of the article, should only include texts that are quoted or referred to in the review. References should be given in an alphabetical order with full bibliographic descriptions, prepared according to the same guidelines as for academic articles (see **"Instructions for authors preparing academic articles"**).

Folia Turistica is a specialist forum for exchanging academic views on tourism and its environment, in its broadest definition. It is one of Poland's leading academic periodicals, published continuously since 1990. The magazine publishes articles in the field of tourism studies, from a broad interdisciplinary perspective (humanist, economic, geographical/ spatial, organizational, and legal issues etc.). Apart from articles presenting the results of empirical research, the journal includes original theoretical, overview, and discursive pieces. The separate headings contain research reports, announcements, and bulletins, reviews of academic works, information on conferences and symposia, and discussions and polemics.

Folia Turistica is indexed on the Polish Ministry of Science and Higher Education list of point-earning academic publications. In the parametric system of evaluating academic work, authors and the institutions they represent receive 11 points for publishing works in the journal. It is also indexed in the Copernicus International Index database (ICV 2016 = 60,90).

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