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The tourist potential of rural areas in Poland

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Sabine Baum

The Tourist Potential of Rural Areas in Poland

Abstract

This paper critically examines the role tourism can play in the stabilisation and diversification of rural areas using the example of Poland. Based on the literature and statistical data, the past development and current state of rural tourism in Poland is analysed. Then an analytical framework based on Porter (1990) is developed to assess the future tourist potential of Polish rural areas and identify barriers and chances of tourist development. The analysis revealed that the future tourist potential of rural areas in Poland is limited and often overestimated. Considerable deficits on the supply side and poor financial resources are combined with a limited and recently shrinking demand. The economic significance of tourism in most rural areas outside of the traditional tourist destinations has so far been marginal. Rural tourism in Poland can grow on a small scale and in niche markets requiring: 1) sound market research at national level, 2) regional tourism strategies based on an analysis of the seven depicted success factors, 3) organisations and intersectoral partnerships at regional level, and 4) a high level of interest and initiative of the local population to develop creative ideas for supply 'bundles' and to overcome the numerous barriers. Rural tourism is not a panacea for the structural problems of rural areas in Poland. The majority of regions – particularly outside of the traditional tourist destinations and far from big cities – will have to base their diversification on more pillars than tourism.

Keywords: Rural tourism, Poland, agritourism, tourist potential, Porter, rural development

Introduction

The rural areas of Central and Eastern Europe face severe challenges related to the lack of non-farm employment. In socialist times, industry and services were hardly decentralised to rural communities, with agriculture being the key sector of the economy. During transition, agricultural employment slumped and many rural commuters lost their income through the closure of industrial

enterprises in urban centres. New non-agricultural jobs which could absorb the released labour have hardly emerged in rural areas outside of the booming metropolitan areas. At the same time, the diversification of rural areas is hindered by lacking agglomeration advantages, particularly in peripheral regions. One potential source of income, often cited as an opportunity for rural areas, is rural tourism. Since the beginning of transition, nearly all Central and Eastern European countries have pinned their hopes on the development of tourism in rural areas. There exist several more or less fuzzy assessments of the tourist potential or specific articles about certain regions and segments of tourism. However, so far a synthesis of all the individual results in a comprehensive analytical framework is missing. Such a synthesis is important to assess whether tourism can actually become a relevant economic factor in the rural areas of Central and Eastern Europe. This paper will critically examine the role tourism can play in the stabilisation and diversification of rural areas using the example of Poland. Based on literature and statistical data, the past development and current state of rural tourism in Poland will be analysed. Then an analytical framework based on Porter (1990) is developed to judge the future tourist potential of Polish rural areas and identify barriers and chances of tourist development. Finally, conclusions are drawn from the analysis.

Definition of Rural Tourism and Agritourism

The concept of rural tourism has no common definition. Lane (1994) argues that defining rural tourism is difficult since rural areas themselves are difficult to define and undergo a complex process of change, since urban forms of tourism – as theme parks or holiday villages – are also located in rural areas and since rural tourism is a complex multi-faceted activity. There is a wide range of definitions in scientific papers and political documents – if any definition is given at all. Some definitions of rural tourism emphasize the rural character of tourism, i.e. contact with nature, experiencing cultural heritage and participating in rural life (e.g. Fedyk 1999; Lane 1994). The narrowest definition restricts rural tourism to tourist stays on farms that means that the term rural tourism and agritourism are often – also in Poland – used interchangeably (Hegarty and Przezbórska 2005). According to a functional, rather wide definition rural tourism comprises all tourist activities in rural

areas including accommodation categories (hotels, guesthouses, private rooms, campgrounds, farms) with the exception of tourism in major towns, specialised tourist resorts, spas and secondary residences (e.g. Oppermann 1996).

This article uses a very simple definition of rural tourism: Rural tourism is tourism in rural areas¹. This has two reasons: (1) The diversity of rural tourism offers and economic possibilities should be reflected in the definition of rural tourism that is not the case if restricting it to agritourism. (2) There must be a possibility to quantify rural tourism which is rather difficult² – notably when using fuzzy concepts as ‘rural culture’. Agritourism is viewed as a segment of rural tourism and includes tourist stays on active agricultural holdings.

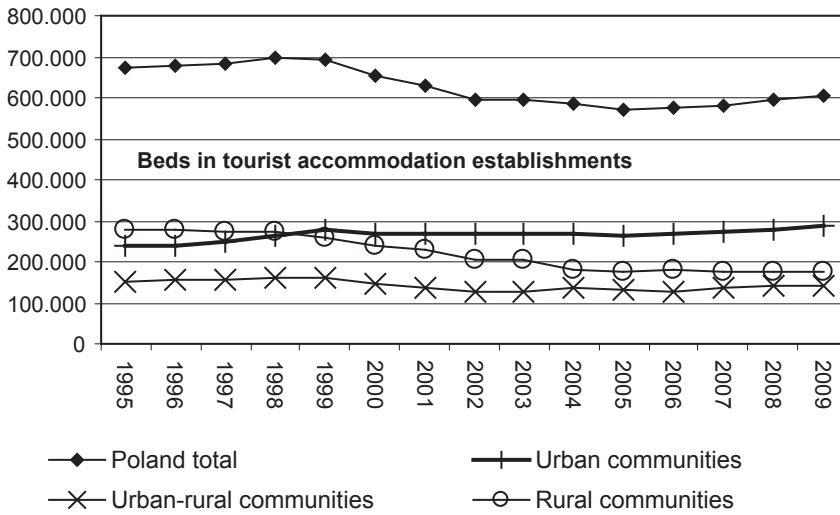
Development and Structure of Rural Tourism in Poland

In Poland, rural tourism has a long tradition. As early as the 19th century wealthy city-dwellers went on holiday to the countryside and agritourism farms (Sikorska-Wolak 2006). After the Second World War the model of social tourism prevailed. Holiday centres – belonging mostly to industrial enterprises, unions and other organisations – accounted for the majority of non-private tourist beds in rural areas beside campsites, private rooms and other accommodation (Kruczala 1990; Paesler 2007). Agritourism was supported by the initiative ‘vacation under a pear tree’ (Fedyk 1999). After 1990, the overall capacity of non-private accommodation in Poland was reduced (Klementowski, Marak and Wyrzykowski 2000). From 1995, the decrease of beds in rural communities continued – primarily in holiday centres, campsites, shelters, excursion hotels or youth hostels (see figure 1) (CSO 2010). However, in rural communities an increase of two tourist accommodation categories could be observed: 1) Beds in hotels showed a steady rise in rural areas so that the share of hotel beds in rural communities in all hotel beds in Poland increased from 5% in 1995 to 11% in 2009 (see figure 2). Hotels

¹ In Poland, rural areas officially encompass ‘rural communities’ and the rural part of ‘urban-rural communities’ excluding towns. Since data for the thus defined ‘rural areas’ is unavailable at the Central Statistical Office of Poland this paper uses data for ‘rural communities’ to depict tourism in rural areas.

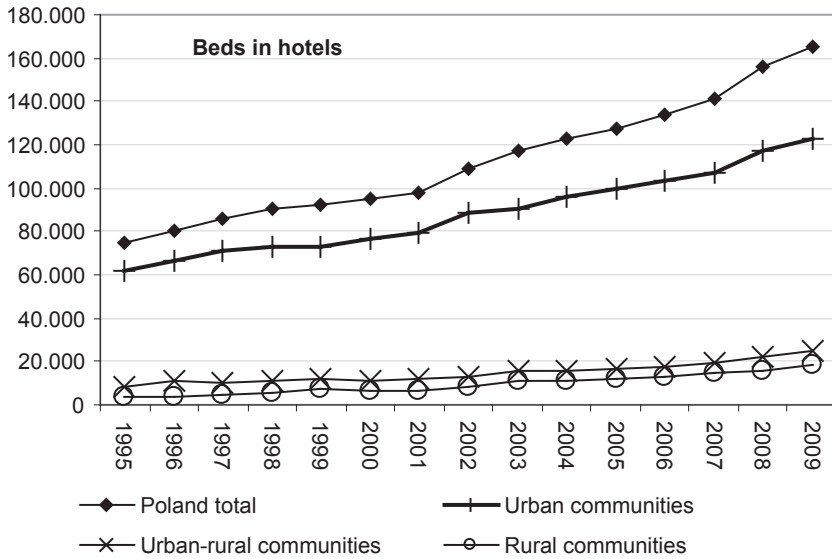
² The categories ‘rural tourism’ or ‘tourism in rural areas’ cannot be found in official tourism statistics. Parts of rural tourism accommodation as agritourism or other private accommodation are not counted in official statistics.

Figure 1. Beds in tourist accommodation establishments in Poland 1995–2009



Source: CSO 2010.

Figure 2. Beds in hotels in Poland 1995–2009



Source: CSO 2010.

accounted for 10% of all beds in non-private tourist accommodation in rural communities in 2009 (CSO 2010). 2) The number of agritourism farms shot up from 590 in 1990 (Ministry of Agriculture and Rural Development 2005) to 8,790 in 2007 (Institute of Tourism 2007)³. Agritourism enterprises now have a significant share in tourist beds in rural areas. In 2007, 87,144 agritourist beds (Institute of Tourism 2007) could be added to the 310,872 beds in non-private accommodation in rural and urban-rural communities (CSO 2010). In 2007, approximately 10% of all tourist beds in Poland were on agritourism farms, 26% in other private accommodation, neither of which are counted by official statistics⁴.

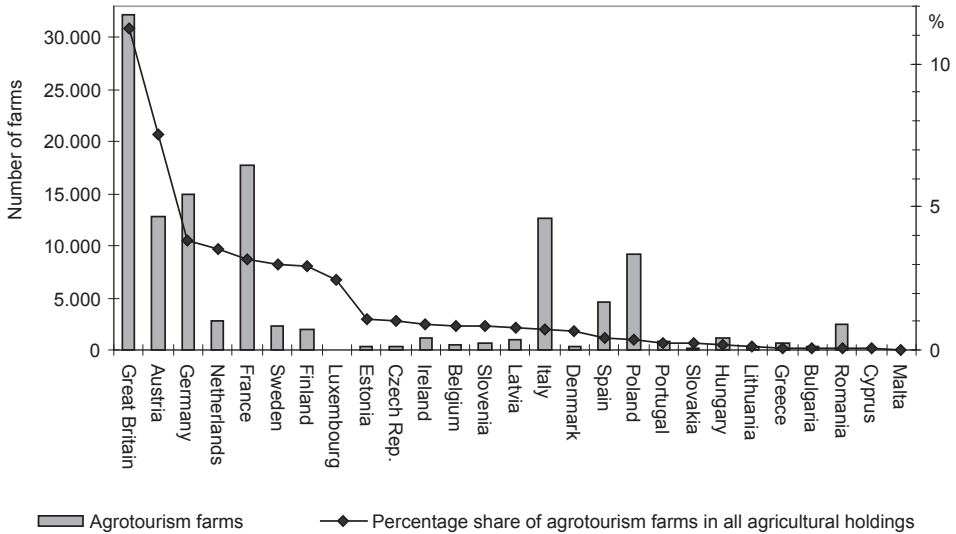
The remarkable development of agritourism in Poland since 1990 as one segment of rural tourism will later be examined in greater detail. Due to the strong rise of agritourism farms, the absolute number is very high compared with other EU countries, even though agritourism farms only had a small share of 0.4% in the multitude of all agricultural holdings in Poland in 2005 (see figure 3). The main motivation of farms to diversify in agritourism is – to a much higher degree than in Western Europe – the wish for an additional source of income. The demand seemed to be rather unconsidered and could not keep up with the rapid development of supply in the 1990s (Bott-Alama 2004; Hegarty and Przezbórska 2005). These facts suggest that starting agritourism was in many cases rather an ‘enforced’ distress-push-diversification⁵ due to the bad living situation resulting in small enterprises with an unstable economic viability. However, some agritourism enterprises also state the opportunity of new business and the tourist interest in rural recreation as a main motivation (Bott-Alama 2004; Hegarty and Przezbórska 2005) corresponding to a ‘free’ demand-pull-diversification resulting in modern enterprises.

³ The figure of 1990 is provided by the agricultural advisory centres; the figure of 2007 is taken from a survey of the Institute of Tourism. There exist no exact, consistent data for agritourism enterprises, which are mostly private accommodation. In Poland agritourism enterprises with no more than five rooms to accommodate guests are exempted from tax and not obliged to register. Only a small fraction of agritourism enterprises is organised in the Polish Federation of Country Tourism ‘Hospitable Farms’.

⁴ Figures for agritourism and private rooms based on the Institute of Tourism 2007. Figures for collective tourist accommodation establishments based on the Central Statistical Office Poland (CSO 2010).

⁵ Details to the concept of distress-push and demand-pull-diversification in Möllers 2006.

Figure 3. Absolute number of agritourism farms and their percentage share in all agricultural holdings in EU27, 2005



Source: Author’s calculation based on Eurostat (Farm Structure Survey).

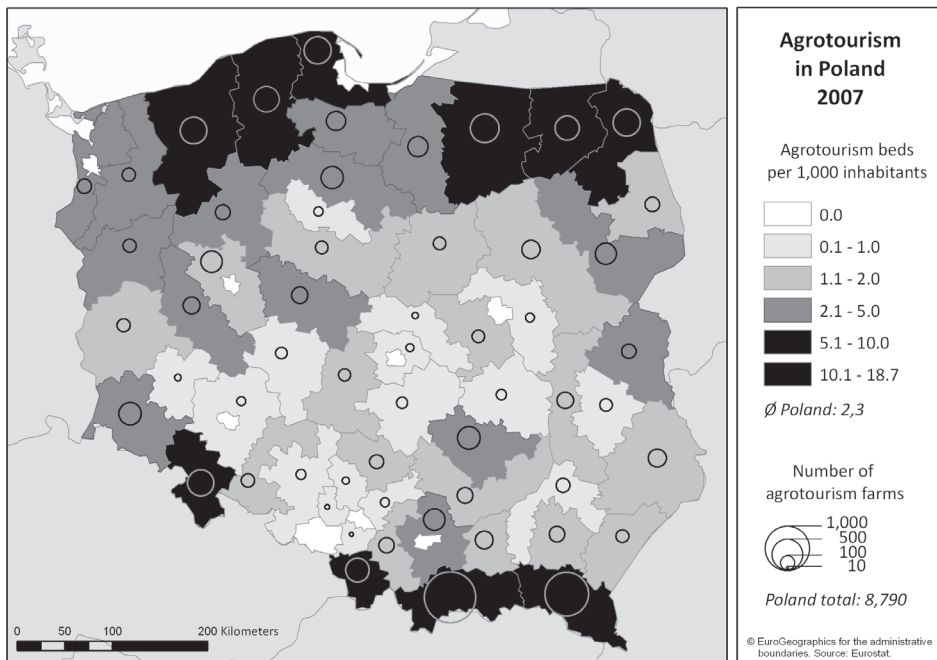
Government, agricultural advisory centres and tourist associations supported the starting up of agritourism farms. Since 1990, agritourism has been regarded as an opportunity for creating new non-agricultural business and jobs in rural areas and has been supported with tax relief (Kozak 2006). Different consulting projects with experts from EU countries (e.g. TOURIN I and II 1992-1997) conducted analyses and pilot schemes as well as identifying rural tourism and agritourism as an important economic factor and as one out of five potential future unique Polish tourism products. Agricultural advisory centres were set up, which supported farmers in the starting and marketing of tourist offers through training and consulting. In 1996, the Polish Federation of Country Tourism ‘Hospitable Farms’ (Polska Federacja Turystyki Wiejskiej ‘Gospodarstwa Gościnne’) was founded, which now encompasses 53 local and regional associations and has an important role in marketing, categorisation, consulting and training. In the following years, agritourism and rural tourism had a high significance in official documents (Augustyn 1998), however, not necessarily resulting in real support and development. A number of measures, such as credit grants, the EU pre-

accession-aid SAPARD, and the SOP 'Restructuring and Modernisation of the Food Sector and Rural Development', were taken to support agritourism farms (Ministry of Agriculture and Rural Development 2005); however, they have only been used by a minority of enterprises (Firlej and Niedziółka 2007). In recent years, the dynamic growth of agritourism has slowed down (Ministry of Agriculture and Rural Development 2005) and possibilities for further quantitative growth seem limited. The main focus is now on raising standards and specialisation, which is rather low in comparison with Ireland (Hegarty and Przezbórska 2005; Kozak 2006; Sikorska-Wolak 2006). However, there exists a legal barrier, since all new activities have to be limited to the previous premises so as to continue having tax relief (Kozak 2006).

A sound evaluation of the development of agritourism is hindered by the fact that there is no exact, comprehensive data about the structure, income, jobs, qualifications and guests of agritourism farms (Kozak 2006). The experience of Western Europe shows that income from agritourism is in most cases only a small addition to the household income (e.g. Hjalager 1996; Oppermann 1996; Sharpley and Vass 2006). The achievable income is already limited by the size of enterprises – in Poland on average 10 beds per farm (Institute of Tourism 2007) which is relatively high for agritourism and comparable with Western Europe – and a price level below that of other collective accommodation (Bott-Alama 2004). According to two recent surveys among agritourism farms the share of income generated by agritourism activities averaged 27% in Małopolska (Tyran 2010) and 18% in the Landscape Park of Barycz Valley (Kurtyka 2010). A survey in the Wielkopolska region revealed that the share of tourism in the total household income is 10% or less in half of agritourism farms. Only 17% of farms referred to tourism as a main source of income (Przezbórska 2003); in a survey in July 2005 in Warmia and Mazury 13% (Krzeski 2005) and in another in the Podkarpackie region 25% (Bott-Alama 2004). By contrast, this figure amounted to 39% in Ireland. A stronger focus on tourism could support the specialisation and market orientation of enterprises and foster cooperation, but is rejected by the majority of Polish agritourism farms (Hegarty and Przezbórska 2005). Similar to the situation in Western Europe (e.g. Hjalager 1996), new jobs for non-family labour have not normally been created by agritourism (Golemsbki and Majewski 2003; Kosmaczewska 2008). However, given the high hidden unemployment in Poland (FDPA 2002 and 2008), the improved utilisation of household labour is also an important contribution, and there can be new jobs in other supplemental tourist services (Kosmaczewska 2008). The share of rural

households, which benefit directly from agritourism, is less than 1% but can be significantly higher in certain areas. Agritourism farms are concentrated on the traditional tourist destinations in the Carpathian and Sudeten Mountains, at the Baltic coast and in the Lake District of Northern Poland (see map 1). In some regions, such as the outermost Southeast and Northeast, agritourist beds now have a high share in tourism supply compared with non-private tourist accommodation. Tourist functions and their economic benefits are often selectively concentrated on certain communities (see e.g. Bański 2003; Pabian and Jaroszewicz 2009). Villages with agritourism farms and other rural tourist accommodation can benefit as a whole by improvement of aesthetics, use of existing housing resources, encouragement to acquire new skills, personality development through contact with tourists, increased care for the heritage and stimulation of entrepreneurship (Bott-Alama 2004).

Map 1. Distribution of agritourism farms and beds in Poland, 2007



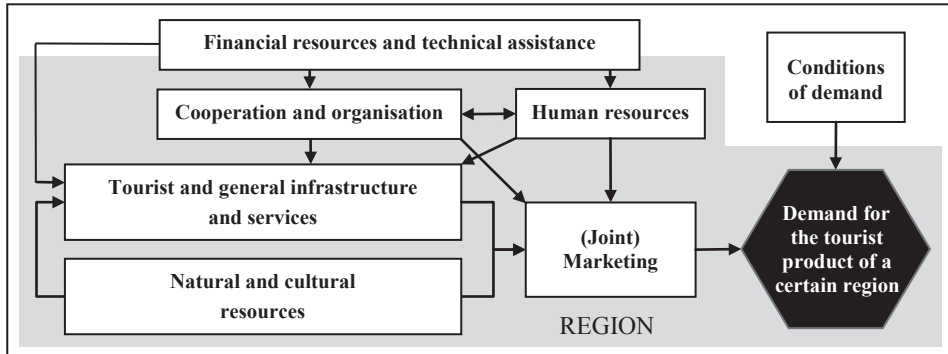
Source: Author's calculation based on Institute of Tourism 2007 (agritourism) and CSO 2010 (inhabitants).

Determinants for Successful Tourist Development

In order to assess the potential of rural tourism for the development of rural areas in Poland it is important to examine the relevant determinants of successful regional tourist development. For this purpose, this article uses the approach of the competitive advantage of nations of Michael E. Porter. According to Porter (1990) the following factors promote or constrain in their respective condition the success of a certain economic sector in a country or region: 1) Factor conditions (human resources, physical resources, knowledge resources, capital resources, infrastructure), 2) Demand conditions, 3) Related and supporting industries, 4) Firm strategy, structure and rivalry. Competitive industries will not be evenly distributed but will be concentrated in networks of firms and institutions within a geographic location (Porter 1998). Porter (1998) suggests that so-called 'clusters' can occur in nearly all types of industry, in urban as well as rural areas, and at several geographical levels – thus also as tourism cluster in rural areas. The approach of Porter represents a rather wide framework which is open to many interpretations. This characteristic – regardless if considered as a strength or weakness – requires an adaptation of Porter's approach to tourism to enable a fruitful analysis. This is also necessary due to the specific nature of tourist services facing a set of market failures such as high transaction costs (lacking tourism market information of small providers), significant public good attributes of some services (as destination marketing, landscape conservation, provision of general infrastructure), and substantial external effects of the activities on the attractiveness of tourist locations (Valentinov and Baum 2008). Based on a comprehensive review of literature dealing with success factors in tourism the general model of Porter was modified resulting in an analytical framework tailored to tourism. This framework encompasses seven success factors of the effective development of tourism in a region: six supply factors on the one hand, and the conditions of demand on the other (see figures 4 and 5).

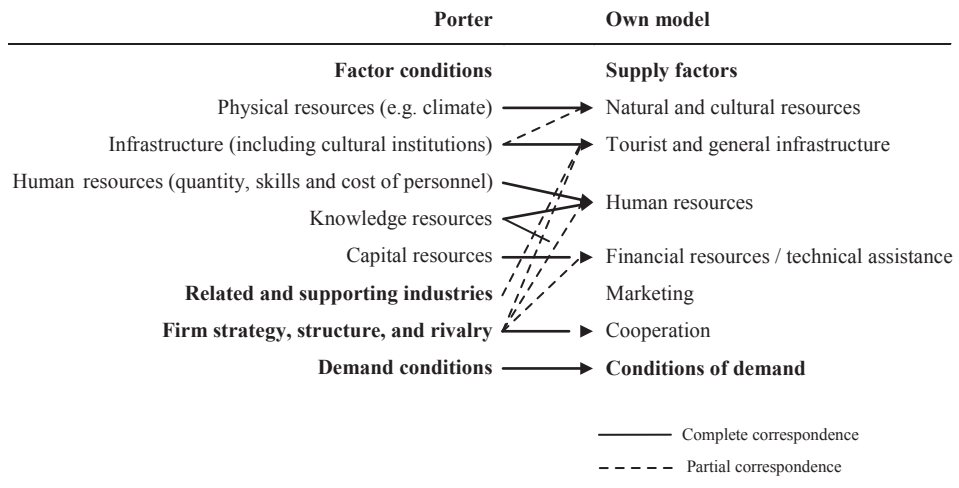
According to Porter (1990), the conditions of demand – its structure, dimension and growth paths particularly in the home market – are one of the most important determinants of the competitive advantage of services including tourism. In times of globalised tourist markets it is extremely important to adjust supply according to demand and to identify trends and target groups (Opaschowski 2001; Steinecke 2006; WTO 2004). Furthermore, Porter considers the factor conditions (as climate and geographical features) as very important for success in tourism. Therefore, both determinants play

Figure 4. Determinants for the successful tourism development in a region



Source: Author’s own work.

Figure 5. Comparison of Porter’s approach of the competitive advantage of nations with the own model of successful regional tourism development



Source: Author’s own work.

a crucial role in the analytical framework. Porter’s factor conditions have been divided in their single factors and adapted to tourism. The natural and cultural resources include the attractiveness of villages and landscapes, the distance to urban markets, climate, cultural heritage and traditions of a region, and they are the most important precondition for the suitability of a region as a tourist destination. Additionally, adequate tourist and general infrastructure as well

as services are necessary, which comprise accommodation, restaurants and recreational facilities (including indoor offers), shops, transport connections, hospitality and atmosphere of the holiday area (Haart and Steinecke 1995; Hahne 2000; Opaschowski 2001). They are offered by a multitude of (usually small) enterprises. Success in tourism requires a critical mass of suppliers combined in one package and geared towards clearly defined target groups. A certain degree of 'staging' – e.g. through theme routes – is needed too (Hahne 2000; Opaschowski 2001; WTO 2004). In order to build successful rural tourism offers, human resources – i.e. the number and qualification of labour, knowledge resources, people's own initiative, the willingness to cooperate and take entrepreneurial risks – play a crucial and increasing role. Thus, training of small rural suppliers with often insufficient entrepreneurial skills and knowledge of tourism markets are important (Gannon 1994; Long and Lane 2000; Pechlaner 2003; WTO 2004). In addition, the development of tourism requires sufficient financial resources – equity capital, credits and capital of public authorities. Since these are often insufficient in rural areas, exogenous investment aids and consulting are often necessary (Long and Nuckolls 1994; WTO 2004).

Marketing was introduced as a new factor, since it is essential for market access, image building and stimulation of demand. Professional, target-oriented marketing should be done jointly within one region, since small rural providers often lack the resources and skills, and tourists ask for an entire rather than an individual tourist product of a destination, whose borders do not always fit within administrative boundaries (Freyer 2007; Hahne 2000; Long and Lane 2000; Wilson et al. 2001). Together with the fragmented structure of rural suppliers and the interconnections of tourism with other economic sectors, this fact highlights the crucial role of cooperation, participation and efficient organisation as an essential business strategy in tourism (Fuchs 2007; Hahne 2000; Long and Nuckolls 1994; Pechlaner 2003; Raich 2006; Wilson et al. 2001) representing Porter's factor 'Firm strategy, structure and rivalry'. Individual actors or communes do not have sufficient resources to become firmly established in tourist markets, since the real competitors are not next door but abroad. Strategic-conceptual tasks such as networking offers can only be done together, while other tasks such as marketing are much more efficient when organised in a cooperative way (Fuchs 2007; Opaschowski 2001; Raich 2006). However, participation and cooperation are complex processes which can be strongly hindered by free riders, conflicts, unequal balance of power, or the rejection of common activities (e.g. Verbole 2000). The success

factors of cooperation are trust, charismatic leadership, individual awareness of the interdependency and benefit of cooperation, definite objectives, legitimacy, an efficient organisational structure and the definition of clear rules (Fuchs 2007; Roberts and Simpson 1999).

The Potential of Rural Tourism in Poland

The above seven success factors will be analysed below on a general level using literature and secondary data. Based on these basic tendencies each single region has to investigate carefully its assets and possibilities and assess the conditions, scale and form in which it can offer rural tourism.

Supply Factors of Rural Tourism in Poland

Natural and cultural resources in Poland are characterised by varied landscapes (such as forests, lakes, river valleys, mountains and seaside), diverse rural traditions and farm structures, multiple cultural sites and large areas with low population density including relics of primeval forests and are therefore in principle suitable for rural tourism. However, the season is mainly focused on summer, which features rather unfavourable, unsettled weather. In the mountains of Southern Poland there are also possibilities for winter sports. The traditional tourist destinations with high scenic attractiveness are the Baltic coast, the lake lands in Northern Poland, the highlands of Central Poland, the Sudeten and Carpathian Mountains in the South. These areas are also mapped by Berkel and Verburg (2011) as areas with a high capacity for development or continuation of rural tourism, while large parts of Poland are shown with only a low capacity. A problem of many rural areas outside of tourist destinations is the lacking unique selling proposition of the landscape. However, Haart and Steinecke (1995) assume that this shortage can be compensated by a combination of supply segments to a unique complete package. In fact, the objective measure of scenic attractiveness for a whole country is connected with many methodological problems (Kreisel and Reeh 2004), although very often tried in Poland (e.g. Mazurski 2000). Therefore, an individual, impartial analysis of scenic and cultural attractiveness and the accessibility for urban markets is proposed for each region interested in tourism. Particularly promising are those areas that already offer tourism due to their attractiveness and the wider surrounding area of big cities with forests and lakes for short

breaks (Bański 2003). The primeval forests such as Białowieża could also turn out to be an attraction for international tourists (Smoczyński 2009). However, other areas can also have 'hidden' attractions revealed by analysis or set up by creative ideas of the population (an example is the successful dinosaurs' park installed after the scientific discovery of dinosaurs' footprints in the commune of Bałtów, see Gramzow 2006b)

The deficient **tourist and general infrastructure** is one of the major barriers to rural tourism in Poland – similar to other Central and Eastern European countries (Jordan 2006; Paesler 2007). The road network, technical infrastructure, accommodation, catering and leisure facilities suffer from decades of neglect and despite recent improvements still need considerable investment in the Polish countryside (Bis and Bis 2009; Golembski and Majewski 2003; Kurek and Pawlusiński 2009; Wyrzykowski 2000). Socialist tourist policy concentrated investment on foreign tourism in big cities and a few attractive regions. Hence in 1990, many rural regions hardly had a competitive tourist infrastructure and a high share of low standard beds which was also characteristic of many newly set-up agritourism farms. Good mid-range accommodation facilities are still insufficient in many areas (Kozak 2006; Paesler 2007). Even in well-developed tourist areas such as the Polish Baltic coast particularly the transport and sport-recreational infrastructure is poor compared with other Western European destinations (Szwichtenberg 2009). However, there have been certain recent positive developments. For example, a constant increase in improved facilities has been observed in the hotel sector in rural areas. In 2009, the first five-star-hotel opened in a rural community in Masuria (CSO 2010). The technical infrastructure such as water supply, sewerage and wastewater treatment has improved and can now be considered as standard (Bański 2009; Szwichtenberg 2009). A noticeable upgrade of tourist and general infrastructure at international level is laborious, time-consuming and costly. In an incremental way, it is feasible in certain suitable places such as Masuria (Jordan 2006). In less attractive regions this can work only in combination with general economic development (Bański 2003) which is most likely to arise in rural areas surrounding large cities (Bański 2009). As Porter (1990) states efficient related and supporting industries – e.g. in agriculture, the food industry, information technology, construction and the travel industry – are important to support rural tourism. In addition to investments in physical infrastructure and enterprises, the evolution of a new service and business culture is required in all former socialist countries. Many tourist firms pursue mainly short-term financial goals and pay too little

attention to service quality, customer satisfaction and loyalty (Augustyn and Thomas 2007).

The **marketing** of rural tourist offers, awareness of its significance and the perception of market segmentation show obvious shortcomings in Poland and there is a lack of professional promotional strategies (Golebski and Majewski 2003; Marciszewska 2006; Szwichtenberg 2009; Wyrzykowski 2000). For example, the rapid development of agritourism occurred mainly in a product-oriented way expecting that demand would arise automatically (Hegarty and Przezbórska 2005; Krzeski 2005). Many agritourism farms do not use the Internet or email as marketing tools (Kosmaczewska 2010). Thus, the future strengthening of marketing and market research is crucial for the success of rural tourism. To attract foreign tourists the sustainable change of the negative image of 'Eastern Europe' – including Poland – is decisive. Central and Eastern Europe is still reputed to be uncertain, poor, badly equipped, monotonous and cheap (Bodmer, Haugg and Sladek 2003; Kolb 2007; Wyrzykowski 2000). A typical association with Poland in particular is car theft (Hołderna-Mielcarek 2004, Kolb 2007). A survey among German drivers in 2010 showed that 79.3% fear for their cars when travelling to Poland (News aktuell Presseportal 2010). The perception of Poland by other countries is illustrated by the Anholt-GfK Nation Brands Index. In the field of tourism, Poland had only rank 36 among 50 countries (Smoczyński 2009). The insufficient knowledge of potential tourists fosters the bad image, so that it persists despite several improvements (Bodmer, Haugg and Sladek 2003; Smoczyński 2009). A substantial change of this mental map needs time and is influenced by many factors (Kolb 2007). It can be supported by comprehensive marketing at national and regional level, with statistics about the real situation e.g. concerning safety, or travel reports about 'insider tips' in the daily and weekly press (Bodmer, Haugg and Sladek 2003). Some recent improvements of Poland's image can be observed through the migration of diligent Polish workers since EU accession (Kolb 2007; Smoczyński 2009).

Human resources in many rural areas of Poland are in a rather unfavourable condition due to an overaged population, out-migration, social frustration through high unemployment and low education levels, thus hindering rural tourism development in the near future (Bański 2003; Bis and Bis 2009). In many places, people's own initiative, entrepreneurial spirit and hospitality are still not very pronounced, and many rural tourism enterprises lack important entrepreneurial and tourism skills (Augustyn 1998; Kozak 2006). Thus, Golebski and Majewski (2003) refer to this situation as

a 'civilisation barrier' to agritourism in Poland. City dwellers, who have moved to rural areas, play an important role as proactive pioneers (Golembki and Majewski 2003; Kozak 2006). It can be assumed that the most active and skilled people have invested in rural tourism. So, several studies indicate that most agritourism providers have at least secondary education, foreign language competence and a rather young manager, half of them having attended advanced training courses (Firlej and Niedziółka 2007; Grykien 1999; Hegarty and Przezbórska 2005). In recent years, some improvements concerning education, the labour market, migration balance (FDPA 2008) and the activity level of rural inhabitants – indicated by an increase of NGOs – (Bański 2009) were reported for rural areas, however, with an assumedly high variation at community level (see e.g. Kupiszewski 2005 for migration).

The development of rural tourism in Poland suffers from fragmented responsibilities, insufficient coordination and **cooperation** between farmers, tourism enterprises, local and regional authorities (Augustyn and Thomas 2007; Golembki and Majewski 2003). Experience in applying participatory procedures is limited, the willingness to cooperate and the consciousness of long-term strategies and aspects of sustainability are rather low (Augustyn and Thomas 2007; Gramzow 2006a, b; Roberts and Simpson 1999). Public-private partnerships are so far scarcely used in Poland (Szwichtenberg 2009). Tourism is primarily the responsibility of local self-government (Majewska 2008), thus entailing the danger of narrow, 'parochial thinking'. The regional level between voivodship and communes, which is most important for the development of a destination, is of marginal relevance in Poland. Very few agritourism farms as well as local and regional organisations are estimated to be members of the Polish Federation of Country Tourism. Many agritourism farms cooperate informally, e.g. through sending tourists, exchange of experiences and joint marketing (Firlej and Niedziółka 2007). Important stimulating effects were produced by the EU initiative LEADER+, which was introduced in Poland as a pilot scheme in 2004. It received great interest, so that between 2004 and 2006 in the first round 174 and in the second round 150 local action groups could be financed (FDPA 2008). Two positive examples are the partnership Flintstone Circle (Krzemienny Krąg) in Southeast Poland and the partnership of the Northern Necklace (Naszyjnik Północy) in Northwest Poland. Both groups managed to successfully develop tourist offers and use their existing attractive – even though not unique – natural resources, which were hardly used by tourists in the past. They could overcome barriers such as low willingness to cooperate, lacking infrastructure or insufficient human

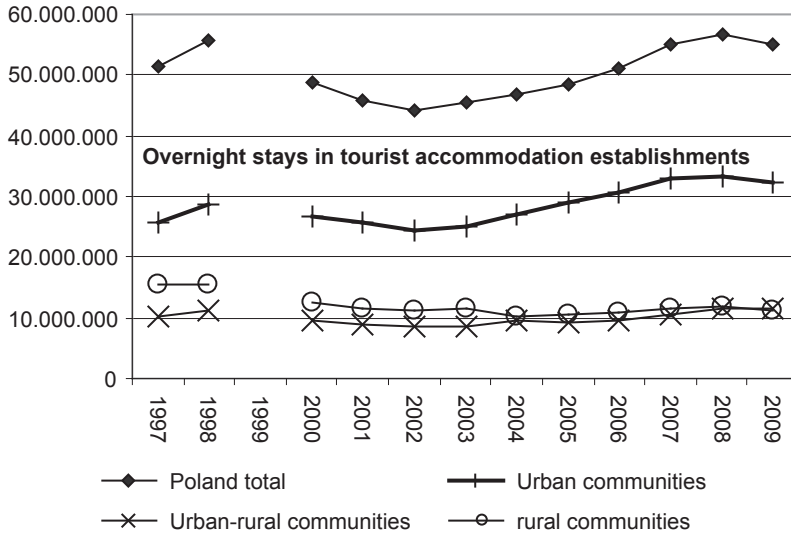
resources with commitment, creative ideas and external support (Gramzow 2006 a, b).

Finally, poor **financial resources** of public authorities and private enterprises are a serious problem for the development of rural tourism so that external funding is considered indispensable (Augustyn 1998; Bis and Bis 2009; Golembki and Majewski 2003; Szwichtenberg 2009; Wyrzykowski 2000). Small agricultural holdings interested in starting tourism often have no financial means. In spite of state programmes, access to credits is restricted for small enterprises so that not many agritourism enterprises have so far made use of loans (Firlej and Niedziółka 2007; Golembki and Majewski 2003). Hopes are connected with EU funds (Golembki and Majewski 2003). However, until now, their allocation was heavily dependent on local possibilities of co-financing (Bański 2003) and so they have only been used by few agritourism farms (Firlej and Niedziółka 2007). As specified in the Polish Rural Development Programme for 2007–2013, rural tourism can potentially use 14% of all EU rural development funds in Poland. These are the measures ‘Rural renewal and development’ (589.6 Mio. Euro) and ‘Establishment and development of micro-enterprises’ (1.023.6 Mio. Euro) of axis 3, and the LEADER axis 4 (787.5 Mio. Euro). In addition, **technical assistance** in the form of external consulting is recommended given the present structure of rural human resources.

Conditions of Demand for Rural Tourism in Poland

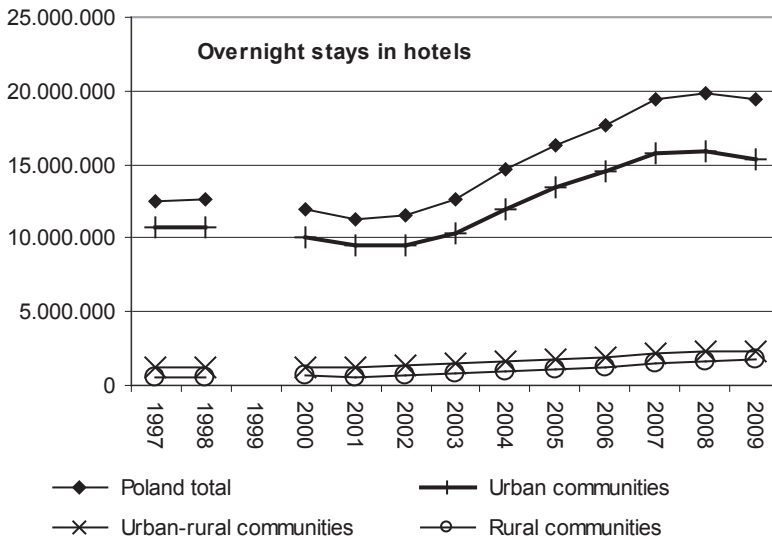
The development of tourist overnight stays in rural areas traces the development of tourist beds (see section 3). After 1989 domestic demand collapsed and took over 15 years to reach pre-transition level (CSO 2010; Klementowski, Marak and Wyrzykowski 2000). Between 1997 and 2009, overnight stays in non-private tourist accommodation in rural communities slightly decreased (see figure 6). The share of overnight stays in rural communities in all overnight stays in Poland dropped from 30% in 1997 to 21% in 2009. In contrast, overnight stays in hotels rose steadily in rural communities. This trend did not even stop after the financial crisis in 2008 – as opposed to the average development in Poland (see figure 7). In 2009, overnight stays in hotels accounted for 15% of all overnight stays in non-private tourist accommodation in rural communities (3% in 1997). Foreign tourists – Germans being the main group – represent a small but increasing segment of rural tourist demand.

Figure 6. Overnight stays in tourist accommodation establishments in Poland 1997–2009



Source: CSO 2010

Figure 7. Overnight stays in hotels in Poland 1997–2009



Source: CSO 2010

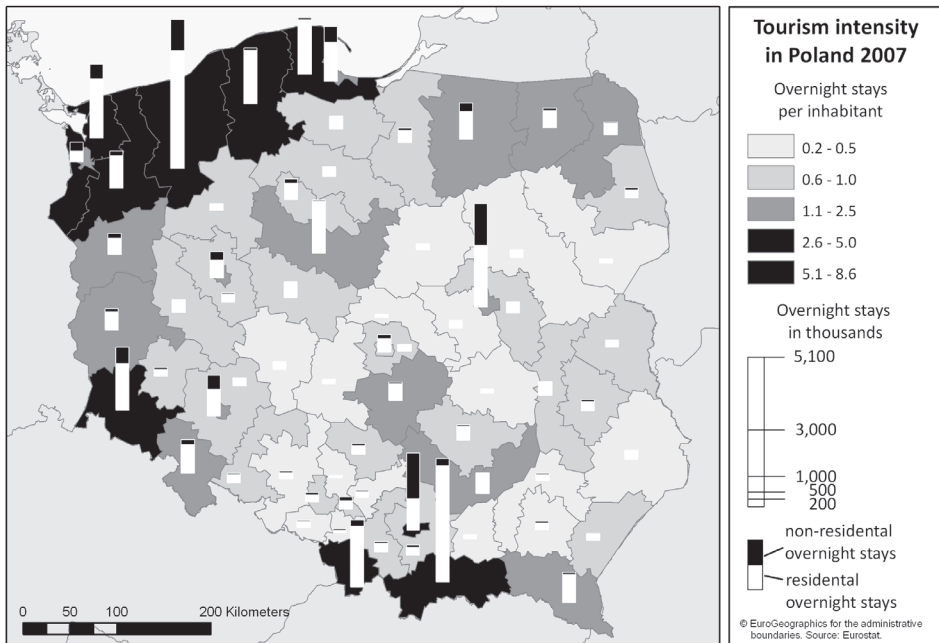
In 2009, foreign tourists accounted for 7% of all non-private overnight stays in rural communities (average Poland 18%); in hotels this share was one fifth (average Poland 34%). However, foreigners' stays have fallen since 2007 (all data from CSO 2010).

Little is known about the detailed structure, trends and motives of demand for rural tourism in Poland, since there are hardly any comprehensive studies or surveys. Detailed data about demand for agritourism or other private accommodation in rural areas is non-existent (Sznajder, Przezbórska and Scrimgeour 2009). The interest of Polish tourists in ecotourism (Nowaczek and Fennell 2002), rural and agritourism (Przezbórska 2003) is described as being rather weak. According to Hegarty and Przezbórska (2005) the demand for agritourism could not keep up with the fast development of supply so that the occupancy rate in agritourism farms is assumedly rather low. Pursuant to surveys of the Institute of Tourism (2006, 2008, 2009), the share of agritourism accommodation out of all Poles' domestic trips lasting over 5 days fluctuated between 2 and 5% in the period 2004-2009 (5% in 2009); in the case of short trips this share was between 1 and 2% (2% in 2009). The Ministry of Agriculture and Rural Development estimated the share of rural private accommodation (agritourism and others) in all overnight stays at 6.7% in 2002 (Hegarty and Przezbórska 2005) and stated an increasing tendency of the demand for agritourism over the past years (Ministry of Agriculture and Rural Development 2005). Kozak (2006) argues that the domestic demand potential for rural tourism in Poland is so far restricted by the high share of the population still living in rural areas and the pronounced family ties of city dwellers with the countryside. An increase in urbanisation and the level of environmental awareness in Polish society (Nowaczek and Fennell 2002) could enhance interest in rural tourism in the future. Several studies indicate that guests of agritourism farms in Poland are mainly city families with rather high qualifications, who repeatedly spend their holidays on farms recommended by word of mouth (Balińska 2010; Kozak 2006; Przezbórska 2005; Zarębski 2006). While Przezbórska (2005) could not observe foreign guests of agritourism farms in Wielkopolska, some studies in the Carpathians (Firlej and Niedziółka 2007) and Sudeten Mountains (Grykien 1999) mention shares of foreign guests, however, without quantifying them. The Ministry of Agriculture and Rural Development (2005) describes a particular interest of foreign guests in ecotourism farms. The motives for farm holidays are mainly rest and recreation, low prices, contact with nature, country life, healthy food and a picturesque landscape (Balińska 2010; Sikorska 2007; Zarębski 2006).

The spatial distribution of tourism demand is strongly concentrated on traditional destinations (see map 2). Two thirds of all overnight stays in non-private tourist accommodation in Poland are on or near the Baltic coast (23%), in the main cities Warsaw, Kraków, Gdansk-Sopot-Gdynia, Wrocław, Łódź, Poznań and Szczecin (together 21%), in the Carpathian Mountains (14%), the Sudeten Mountains (6%) and in Masuria (4%). Nearly half of foreign overnight stays take place in the main cities and another 20% on the Baltic coast (CSO 2010)⁶. This reflects the general situation of tourism all over the world with tourism being concentrated in specialised tourist resorts and major cultural centres (Lane 1994).

The future development of demand is hard to assess. The financial crisis in 2008 was a setback for the development of tourism in Poland as in the whole of Europe (ETC 2009). Between 2008 and 2009, domestic and foreign

Map 2. Tourism intensity in Polish regions, 2007



Source: Author's calculation based on data of CSO 2010.

Notes: Average of tourism intensity in Poland 2007: 1.4 overnight stays per inhabitant (EU27 4.7, Eurostat).

⁶ Calculated with the 66 sub-regions of Poland (NUTS3).

overnight stays decreased (CSO 2010). The Institute of Tourism had to correct its optimistic forecasts from 2008 and now estimates that the long domestic holiday trips of Poles will only slightly increase from 13.3 million in 2009 to 15.3 million in 2013 not reaching the 2007 level. The arrival of foreign guests in collective accommodation establishments is assumed to rise from 3.9 million in 2009 to 4.3 million in 2013 – also below the 2007 level (Institute of Tourism 2010). The pace of recovery remains uncertain and the risks of a further downturn for the travel demand persist (ETC 2009). Participation in tourism will amongst others depend on unemployment and income trends. In Poland, the continuous decrease in unemployment over the past years stopped and the unemployment rate rose from 6.0% in 2008 to 7.7 in 2009 (CSO 2010). The growth rate of GDP slowed down, but increased again at the end of 2009 (PMR 2010).

Rural tourism in Poland outside of the main tourist destinations is a small niche market rather than a large tourist segment. Future growth of the demand for rural tourism is possible to a moderate extent if opportunities can be taken or new demand created by innovative offers. If rural tourism develops individual offers for certain target groups rather than standard ones it could benefit from the general trend toward more flexible, segmented and individualised tourism demand (ETC 2006; Kozak 2006; Pils 2006; Steinecke 2006). Some tourist enterprises could also try to follow the recent trend of wellness and health offers, which will also be stimulated by Europe's aging population (ETC 2006; Pils 2006). All in all, information and data about dimensions, segmentation, preferences and trends of Polish tourism fall far short, and there is an urgent need for market research to be successful in rural tourism.

Conclusions

Rural tourism – and particularly agritourism, which has a comparatively high share in the tourist offers of rural areas – is an intensely discussed and politically supported issue in Poland. However, its significance is often overestimated. Tourism in rural areas outside the main tourist destinations is a small tourist segment in Poland; agritourism a niche market. The economic significance of tourism in most rural areas outside the traditional tourist destinations is still marginal. Tourist functions and their economic benefits are often selectively concentrated on certain communities. Even agritourism farms, which experienced a remarkable growth after 1990, are concentrated in the

Carpathian and Sudeten Mountains, near the Baltic coast and in the Lakelands of Northern Poland. Altogether, less than a half per cent of all rural households benefit directly from agritourism. The contribution to household income and job creation is rather low. Furthermore, it is questionable whether the isolated set-up of agritourism farms – often as distress-push diversification – is sustainable without development of other supply factors or considering demand. Nevertheless, in many areas of Poland, agritourism created important incentives for entrepreneurship, local initiative and development of human resources.

The future tourist potential of rural areas in Poland is limited. The analysis of the potential for rural tourism in Poland draws a picture of a few strengths, many weaknesses and some opportunities (see table 1). Considerable deficits on the supply side and poor financial (public and private) resources are combined with limited and recently decreasing demand. The natural and cultural resources in Poland form an important basis for rural tourism but

Table 1. SWOT-Analysis of rural tourism in Poland

Strengths (+)	Weaknesses (-)
<ul style="list-style-type: none"> - varied landscapes suitable for tourism including pristine landscapes and primeval forests - many cultural sites - positive development of hotels and agritourism 	<ul style="list-style-type: none"> - lacking unique selling proposition of the landscape in many rural areas - deficient tourist and general infrastructure - weak marketing (awareness) - insufficient coordination of tourist offers - unfavourable human resources in many rural areas - poor financial resources of public authorities and private enterprises - limited demand and market information
Opportunities ☺	Threats ☹
<ul style="list-style-type: none"> - local recreation around big cities - local initiatives (e.g. of LEADER type) - financial means of (EU) programmes - improvement of road network - economic recovery (increasing incomes) - rising environmental awareness in Poland - positive development of rural human resources 	<ul style="list-style-type: none"> - financial crisis linked with higher unemployment, reduced incomes and restricted access to credits - parish-pump politics (no regional cooperation) - crime (as perceived by tourists) - persistent negative image of Poland for tourists

Source: Author’s own work.

are outside of the traditional tourist destinations. The difficulties to establish new tourist destinations in the globalised tourism markets should not be underestimated. Sustainable growth of rural tourism on a small scale and in niche markets can occur if local people show a high level of interest and initiative, develop creative ideas for 'bundles' of tourism services and are able to overcome numerous barriers. A realistic analysis of the depicted seven success factors should always be the starting point; and the tourism strategy should be embedded in an overall concept for the rural area. An increasing interest in rural tourism will in most areas strongly depend on the development of domestic demand. Foreign tourists only account for a small percentage of overnight stays and – in contrast to some earlier expectations – it cannot be assumed that Germans or other foreigners will come in droves to Poland's natural areas in the near future.

Long-term successful rural tourism in Poland needs in future: 1) sound market research and work on the international image of Poland at national level, 2) regional tourism strategies based on an analysis of the seven success factors, 3) functioning organisations and intersectoral partnerships between private enterprises, non-profit organisations and the government on the regional (destination) level for the development of combined 'bundles' of tourism offers, coordination, marketing and training. Rural tourism is not a panacea for the structural problems of rural areas in Poland. The majority of regions – particularly outside of the traditional tourist destinations and far from big cities – will have to base their diversification on more pillars than tourism.

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