

# INTERNATIONAL INBOUND TOURISM TO THE POLISH CARPATHIANS - THE MAIN SOURCE MARKETS AND THEIR GROWTH OPPORTUNITIES

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**Abstract:** *The Carpathians are the largest and most important mountain tourist region in Poland. The origin of tourism development of the Polish Carpathians falls on the 19<sup>th</sup> century. From the 1950s, the mass tourism was developed - mostly for the domestic market which had significantly changed the image of Carpathian tourism,. Today, the Polish Carpathians account for over 20% of total tourist flows to the country. Still, the region is not so popular among foreign visitors. Only 5-10% of foreign tourists visiting Poland spend there one night or more. The paper presents the current state of international tourism in the Polish Carpathians, indicating the spatial concentration of the foreign tourism, the main source markets and highlighting the opportunities for growth of the Carpathians as an international tourism market.*

**Key words:** *Polish Carpathians, Tourism development, SWOT analysis*

## INTRODUCTION

The Carpathians are the largest mountain range of the Central-Eastern Europe and the second largest, after the Alps, mountain range in Europe. The Carpathians stretch the length of more than 1300 km, from the eastern edges of the arc of Austria by the Czech Republic, Slovakia, Poland, Hungary, Ukraine, Romania to the eastern borders of Serbia. About 10% of the total of the Carpathians is located in Poland. The Polish Carpathians occupy the area of 19.6 thousand square kilometers and run in the southern part of the country (Warszyńska 1995). This region has a very attractive natural environment. More than 70% of the Polish Carpathians is covered by the nature protected areas. There are two UNESCO Biosphere Reserves, six national parks, over 80 nature reserves and 18 landscape parks (Zawilińska 2005). There is also a large percentage of forests, which occupy 40% of these mountains. The high natural values of the Polish Carpathians affect the high tourist attractiveness of the region. Equally important for the tourism development is cultural heritage. Carpathians are one of the most interesting cultural regions in Poland, with well-preserved folklore, religious customs, pastoral traditions, captivating picturesque landscapes of mountain villages and historic wooden buildings (see: Warszyńska 1995).

Polish Carpathians are one of the most important tourist regions in Poland. Tourist tradition dates back to the 19th century. Since the 1950s, the Carpathians were occupied by mass tourism associated with the rapid development of accommodation facilities and skiing ventures. Since the 1990s, tourism in the Carpathians has passed

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through a series of significant changes, particularly in terms of ownership (Faracik et al. 2014). Today, the tourism sector is entirely private and strives to make its tourism offer closely related to the needs of the market. At present, the Carpathians are responsible for approx. 13% of the hotel beds of the country. The standard of accommodation has significantly improved, especially in the hotel sector. Spa and wellness facilities have developed, very popular became the aqua-parks associated with the ski resorts. (Mika, Pawlusiński 2006). Currently, the region is visited by 3 million tourists per year (table 1). Tourist traffic is carried out in two seasons: summer and winter. During the summer, next to the mountain hiking, very popular are recreation, including cycling, and stays in the countryside. In the winter, ski resorts are popular. The spatial distribution is dominated by tourist arrivals to the Tatra Mountains, the Beskid Śląski Mountains, Pieniny and Beskid Sądecki. These four regions concentrate the majority of the tourist traffic. Other regions are much less popular.

Despite the important role of the Carpathians in domestic tourism in Poland, the region is still not so much popular among foreign tourists. The Carpathian Mountains lie in the southern part of the country, close to the Czech Republic and Slovakia. From 5 to 10% of the total number of tourists in the region are foreign tourists (table 1). The key question is whether the small proportion of foreign tourists is typical for the Polish Carpathian region and is it characteristic for all holiday regions of the country. The purpose of this article is to illustrate the state of development of foreign tourism in the Carpathians, indicating the size and structure of the international inbound tourism as well as places of concentration of tourist traffic and main forms of tourism. The study presents the opportunities and barriers for tourism development in the Polish Carpathians on the international arena. For achieving the goal of this study statistical data, including data from the Central Statistical Office (in Polish: GUS), the results of previous research on tourism in the Polish Carpathians and tourism development strategies at national, regional and local level will be used.

## **INTERNATIONAL INBOUND TOURISM IN POLAND *VERSUS* THE POLISH CARPATHIANS**

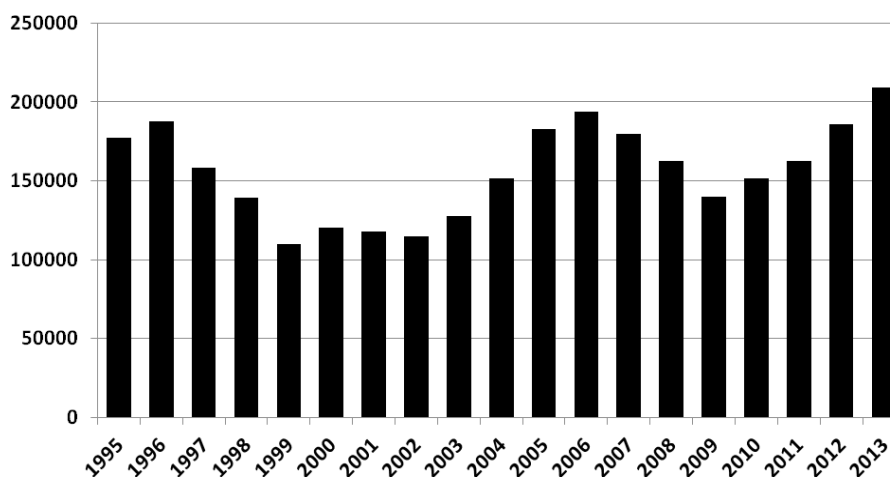
Poland, from the early 1990s, along with the collapse of the communist bloc, has become an important international tourism destination. In 1997, Poland was listed in the 8th place among the most popular tourist countries in the world (19 million tourists). The development of tourism in the 1990s, however, encountered many obstacles, among which the most important were the following: existing political barriers (location outside of the European Union), poor development of hotel facilities and communications. Most of the guests who visited Poland wanted to see the country from behind the iron curtain (which contributed to the political changes in Europe) associated with Lech Walesa and the Solidarity movement, the country where the Pope was born. In Poland, the guests were mostly from the neighboring countries, especially from Germany, Ukraine, Russia, the Czech Republic and Slovakia. Travel for business or shopping purposes dominated, the transit traffic (especially between Eastern and Western Europe) was also important. Foreign tourist traffic mainly concentrated in main urban areas and border cities. The Polish classic holiday

regions, including the Carpathians and their tourism offer, were outside the circle of the interest to foreign tourists.

Since 2002, the Polish share in the international tourism market has decreased (14 million foreign tourists). This is due to the collapse of tourism after the attack on the World Trade Center in 2001. Small changes to this trend were observed after the entry of Poland to the European Union in 2004 (more than 15 million foreign tourists in 2005). However, the economic crisis in 2008-2009 again hampered the development of international tourism in Poland. In 2009, the country was visited by only 12 million international tourists. The income from tourism decreased significantly. Only in recent years, there has been observed an upward trend. In 2013, 15.8 million foreign tourists visited Poland (Janczak, Patelak 2014). It should be noted, however, that in comparison with 2000, Polish participation in the world of tourism has decreased significantly, from 4.5% to 2.5%. In 2013, Poland was listed on the 18th place among the most popular tourist countries in the world; in Europe – it was in the 10th position (after France, Spain, Italy, the UK, Russia, Austria, Ukraine and Greece).

The experience of the last 20 years indicates that the Polish foreign tourism (inbound) became dependent on the situation in the global tourism markets. In relation to directions of arrivals from the 1990s, a significant change has been observed. With the development of air services, the number of tourists from Western Europe increased, including the British, Dutch, Italians, French, Swedes and Norwegians. In the past 20 years, the spatial distribution of tourism also has changed. The largest urban centers have become most popular. They host more than 65% of all foreign visitors and are responsible for nearly 60% of nights in hotel accommodation facilities. The motivations of tourists to visit Poland have also changed. In addition to business purposes (23% of tourists) and VFR (visiting friends and relatives; 19% of tourists), a growing group of visitors are city-break tourists as well as the guests who stay in a classic tourist regions, during summer and winter season. In total, approx. 22% of foreign tourists are visiting Poland with the *stricte* tourism purposes. Today, in border regions shopping tourism has developed, especially in north-eastern Poland – from the Kaliningrad Oblast and Lithuania and Belarus, as well as in southern Poland – from Slovakia and the Czech Republic. Less important are nowadays the German shopping trips to Poland. One day trips dominate in the commercial tourism. Longer stays are in charge of 12% of foreign tourists (Janczak, Patelak 2014).

The main holiday/summer season area for foreign tourism is the Polish Baltic coast. According to data by GUS, every year this area is visited by 800 thousand international tourists who stay at hotels and similar facilities. These facilities provide about 3.9 million overnight stays. Share of foreign visitors in all tourist traffic to the region is over **24%**. The Baltic Coast is characterized by a relatively long duration of stay. It amounts to more than 5 days in both the domestic and international tourism. Tourism is typically seasonal in nature and is limited to holiday stays. The largest group is made by tourists from Germany who constitute nearly 60% of all international visitors. Guests from Norway (7%), Russians (7%) and Sweden (4%) have also a significant contribution. The Baltic Coast brings together approx. 15% of international tourists and approx. 30% of overnight stays of international visitors with across the country.



**Figure 1.** Foreign inbound tourism to the Polish Carpathians in the years 1995-2013  
(number of tourists in hotels and similar facilities)

Source: Local Data Bank Central Statistical Office (BDL GUS).

**Table 1.** The Polish Carpathians compared to other holiday regions in Poland

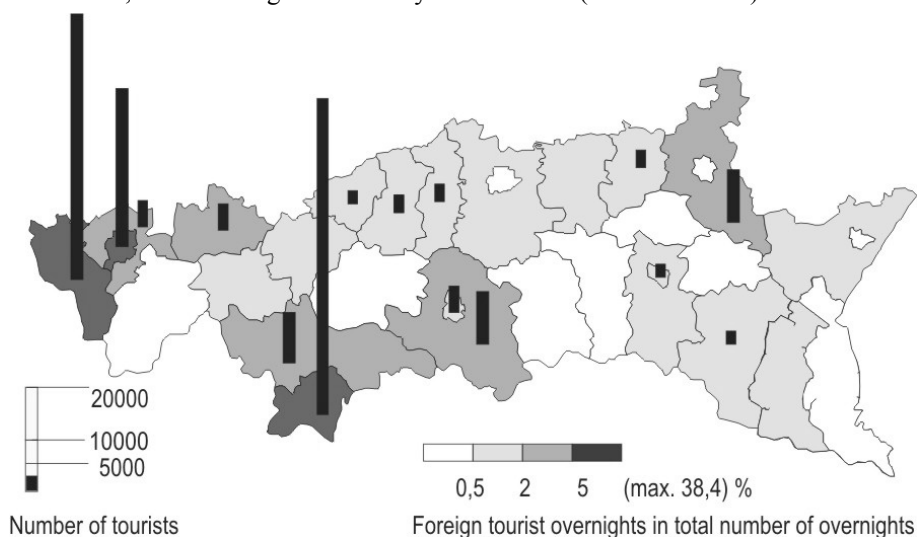
	The Carpathians	The Sudetes	The Baltic Coast
Area (‘000 km <sup>2</sup> )	19.6	9.8	4.1
The density of accommodation establishments (number of beds per 1 km <sup>2</sup> )	4.8	4.2	43.7
Tourists in hotels and similar facilities total (‘000)	3120	1114	2459
Foreign tourists in hotels and similar facilities total (‘000)	210	164	772
The share of foreign tourists in all tourists	8.5%	14.7%	24.8%
Overnight stays in hotels and similar facilities total (‘000)	9086	4013	16136
Overnight stays of foreign tourists in hotels and similar facilities total (‘000)	491	519	3894
The share of foreign tourists in all overnight stays	5.4%	3.2%	5.0%
The average length of stay of all tourists	3.69	3.60	5.17
The average length of stay of foreign tourists	2.33	3.16	5.04

Source: own work based on the statistical data of the Local Data Bank Central Statistical Office (BDL GUS).

Among the mountain regions of Poland, the Carpathians record the biggest number of tourists per year (210 thousand). However, considering the number of nights, slightly larger size of foreign tourist traffic had been achieved in the Sudety Mountains. It should be also noted that the Sudetes are smaller, which may indicate a greater density of tourism. The Carpathians are the traditional market for domestic tourism. The region recorded the largest tourist traffic in the country in terms of numbers of tourists. Every year it is visited by approx. 3.1 million tourists, of which more than 90% are domestic visitors. The average length of stay is much shorter than in the region of Pomerania. On average, guests are staying in the Carpathians for

about 3.6 days, while the average length of stay of foreign guests is a little over 2.3 days and is the lowest from all analyzed Polish regions.

Foreign tourism in the Carpathians is characterized by large spatial disparities. The spatial distribution of tourism in the Carpathians is clearly highlighted in the division into regions with high popularity and regions practically without any visits of international tourists. Analyzing the records of engraving in figure 2, it is clear that the majority of tourism is concentrated in two regions. The first is the Podhale and the Tatra Mountains (over 75 thous. international tourists). This is a typical holiday region, with the highest value of the environment (including the Tatra Mountains - the only mountain range in Poland of the alpine character). Particularly all well-developed ski resorts are located in this region. Here, the city Zakopane is called a “tourist mecca”, which concentrates 32% of the total international tourism in the Carpathians (62 thous. tourists, 178 thous. of nights). Among other popular regions of the Carpathians are the Podhale and Tatra villages: Białka Tatrzańska and Bukowina Tatrzańska, which have grown recently as ski resorts (Krzesiwo 2014).



**Figure 2.** The spatial distribution of inbound foreign tourism to the Polish Carpathians

Source: own work based on the statistical data of the Local Data Bank Central Statistical Office (BDL GUS).

The second most popular region of the Carpathians is the Beskid Śląski. Every year this region is visited by more than 80 thous. tourists where the majority (70%) go to Bielsko-Biala and Cieszyn - the two main cities in this part of the Carpathians. In the case of Cieszyn, a significant number of visitors is represented by transit tourism traffic. Cieszyn is a border town between Poland and the Czech Republic which lies on an important communication route between the East and the South of Europe. The city is especially popular as a transit city, providing accommodation facilities for tour groups coming from Russia, Belarus, the Baltic States and Ukraine in the

direction of Italy and France before entering the Czech Republic. Bielsko-Biala is an important economic center in the Carpathians (e.g. it hosts the Fiat factory), which has been for years visited by tourists from Germany and Italy. Wisła, Szczyrk and Ustroń are the cities with a classical recreational character. These three tourist centers hold approx. 30% of the total international tourism in the region. From other regions of the Carpathians, the region of Nowy Sącz (the Beskid Sądecki) is also interesting, with the most popular centers Krynica, Nowy Sącz and Muszyna. Lastly, Wadowice, Kalwaria Zebrzydowska are the most important centers of pilgrimage in the Polish Carpathians, situated in the northern part of the region, between Krakow and Bielsko-Biala.

The spatial distribution of tourism in the Polish Carpathians is characterized by the three areas of concentration of tourist traffic and a transit area. The main areas of concentration of tourist traffic are: the Tatra Mountains, along with the nearby Pieniny Mountains and the Podhale Region, the Beskid Śląski and the Beskid Sądecki. Krakow is the main international tourism center for the Carpathians inbound tourism. Every year, it is visited by more than 2 million foreign visitors (Kurek, Pawlusinski 2009) and some of them pursue one-day trips to the vicinity of Krakow visiting the Carpathians: Wadowice, the birthplace of the Pope John Paul II and the monastery in Kalwaria Zebrzydowska which is part of the UNESCO Heritage List, Zakopane in the Tatra Mountains or rafting in the region of the Dunajec River in the Pieniny. Minor tourism centers are Rzeszów and Katowice. Lower popularity of these cities is due to a much smaller inflow of international tourists to these cities. Tourists from Katowice mainly travel to the Beskid Śląski region, while in the case of Rzeszów – to the Bieszczady Mountains. The main transit area of the Carpathians is located in the northern boundary of this mountain range, between Przemyśl and Krakow (route No. 4). In the villages along this route many accommodation facilities have been developed which primarily focus on transit tourist traffic. Similar process can be observed along the road between Krakow and Cieszyn where tourist traffic has a remarkably transit character. The average length of stay of international guests in Cieszyn is only 1.1 days.

When analyzing the spatial distribution of foreign tourist traffic, it should be noted that a large part of the Carpathian region, especially its eastern part - Bieszczady and the Beskid Niski, and the northern part of the Carpathian foothills are still not visited by any foreign tourists. It is worth mentioning that these areas are characterized by a significantly low level of tourism development, especially in terms of the hotel-type accommodation facilities.

## MAIN SOURCE MARKETS

International tourism to the Polish Carpathians can be differentiated according to the 4 main tourism markets. These are:

- the German market
- the East market (Ukraine, Russia, Belarus)
- the - Western European market (UE14 excluding Germany; dominated by three countries: the UK, France and Italy)
- the V4 market (the Czech Republic, Slovakia, Hungary).

These four markets account for over  $\frac{3}{4}$  of international tourism in the Carpathians and  $\frac{3}{4}$  of the number of overnights stays of foreign tourists. Table 2 presents the key characteristics of the markets. One of the goals of this article is to identify the possibilities for further development of these markets.

**Table 2.** *The main international tourist market in the Polish tourist regions in 2013 (share in %)*

<b>Poland</b>	<b>The Carpathians</b>	<b>The Sudetes</b>	<b>The Baltic Coast</b>
Germany – 24.8%	Ukraine – 15.1%	Germany – 46.5%	Germany – 59.3%
Russia – 7.8%	Russia – 12.2%	Russia – 18.6%	Russia – 7.4%
United Kingdom – 7.3%	Germany – 11.2%	Ukraine – 7.8%	Norway – 7.3%
Ukraine – 5.2%	Latvia – 5.4%	Czech Republic – 2.8%	Sweden – 4.5%
Italy – 4.2%	Slovakia – 4.8%	Lithuania – 2.7%	United Kingdom – 3.1%
Belarus – 3.9%	United Kingdom – 4.7%	Belarus – 2.6%	USA – 1.9%
France – 3.9%	France – 4.5%		Finland – 1.8%
Norway – 2.9%	Belarus – 4.5%		Denmark – 1.7%
Spain – 2.9%	Czech Republic – 4.4%		Spain – 1.5%
The Netherlands – 2.3%	Hungary – 4.3%		

Source: own work based on the statistical data of the Local Data Bank Central Statistical Office (BDL GUS).

**Table 3.** *The main international tourist market in the Polish Carpathians*

	2005	2006	2007	2008	2009	2010	2011	2012	2013
The number of foreign tourists in hotels and similar facilities ('000)									
The German Market	47.4	51.0	40.3	31.1	26.0	24.9	24.3	26.5	<b>23.4</b>
The Eastern Market	29.7	36.0	35.9	30.8	32.7	37.9	48.8	64.9	<b>66.8</b>
The Western Europe Market	39.4	40.0	38.4	34.6	28.0	29.2	28.3	27.2	<b>27.1</b>
The V4 Market	22.4	23.3	24.8	27.8	25.4	25.7	26.3	30.1	<b>30.8</b>
Overnight stays of foreign tourists in hotels and similar facilities ('000)									
The German Market	183.0	228.0	174.3	122.2	92.3	81.5	74.9	76.3	<b>78.2</b>
The Eastern Market	103.8	120.9	121.2	98.9	93.8	101.8	118.6	142.4	<b>158.3</b>
The Western Europe Market	113.9	115.1	112.6	96.6	80.2	78.0	70.8	71.7	<b>67.2</b>
The V4 Market	46.5	48.6	53.2	53.8	51.3	52.0	52.8	64.6	<b>66.3</b>

Source: own work based on the statistical data of the Local Data Bank Central Statistical Office (BDL GUS).

## THE GERMAN MARKET

Germany, over the years, has been the main market of international tourism to Poland, with a sustained upward trend. This segment of the tourism market accounts for 25% of the total foreign visitors to the Polish accommodation facilities, and up to 37% of overnight stays. In total, Poland is visited by 29 million of Germans, of which 5.3 million are tourists (Janczak, Patelak 2014). The German market plays an important role in the western part of the country. In the case of the Baltic Sea coast, Germans account for approx. 60% of all international tourists and in the Sudety Mountains they account close for 50%. However, in the Polish Carpathians, their share is only 11.2%, while the number of overnight stays is 16.8%. The spatial distribution of the German tourist traffic is dominated by the two regions: the Podhale, the Tatra Mountains and the Pieniny with approx. 30% of tourists and overnight stays and the

Beskid Śląski – with 21% of the registered guests in accommodation and 35% of overnight stays. Another 10% of tourist traffic in Germany is associated with stays in Bielsko-Biala (mainly business tourism) which is a major economic center in the Polish Carpathians. The tourist traffic to the eastern part of the region, including the Bieszczady and the Beskid Niski, is almost negligible.

The German tourist market is the market that, in the case of the Polish Carpathians, has recorded the highest decline in the past 8 years. For comparison, in 2006 in the accommodation facilities in the Carpathians there were about 50 thous. German tourists; in 2013 the number went down to only 23 thous. tourist. Similar declines were observed for the number of nights - from 230 thous. in 2006 to approx. 78 thous. in 2013 (Local Bank Data 2013). The decline in popularity of the Polish Carpathians among German tourists can be connected with the global economic crisis. The largest decreases in the case of the German market were observed for stays in health resorts. This is shown by the example of the Ustroń spa where a decline in the number of arrivals of foreign bathers (of 15 thous., in 2006 to 2.5 thous. in 2013) and overnight stays (of 137 thous. in 2006 to 20 thous. in 2013) has been observed for the past 8 years. The poor competitiveness of the Carpathian` spas, not only in relation to the neighboring Slovak or Czech spas, but also in relation to the spas in other parts of the country, and the lack of competing markets for foreign clients can further reduce the outflow of foreign bathers from Carpathian` spas. It is worth mentioning that arrivals for health purposes are declared by approx. 12% of German tourists and this creates the largest declared interest for these purposes among all foreign visitors.

The decline in arrivals from Germany was also observed in the case of mountain resorts such as Zakopane and Wisła. In the case of Zakopane, the number of tourists from Germany has decreased by more than 40% (the number of tourists from 10 thous. to 6 thousand; the number of overnight stays - from 30 thous. to 18 thous.). Similar declines were also observed in the case of Wisła, although the overall size of tourism traffic in this case was smaller. Arrivals for business purposes (mainly to cities) and transit tourist traffic remained at a similar level.

It should be emphasized that the German market is one of the promising tourism markets for the Carpathians. The barriers to its further development are as follows: under-developed infrastructure, particularly in relation to accommodation, as well as the lack of tradition in customer service for Germans (in contrast to other regions of the country). The greater distance from the German market to the region under review is also important. This is in contrast to the Sudety Mountains, which can become a destination for weekend stays or even one- day trips for the residents of the Berlin area. To attract German tourists, the Polish Carpathians authorities should focus on selected market segments for which a modified offer is needed. Particularly large market opportunities exist among so-called silver heads (silver market). The Carpathians can offer not only relaxation stays, but also spa or spa & wellness stays, for this market. They can also develop the field of active recreation, including cycling or farm stays. Equally attractive group of customers may be families with children, interested in holidays in the mountain environment, associated with a stay in the countryside and active recreation. The major tasks facing the Carpathian tourism in relation to this market are as follows: the improvement of the tourism infrastructure,



adapting the offer of tourist farms to the German customer needs, including language specialization, the development of active recreation which would be able to support the German market. Cultural routes can be an interesting niche market for German customers, which in recent years have been developed more dynamically. In this case, promotional activities should be intensified in order to raise the offer to the German market. It is worth mentioning that more than 27% of German tourists declare relaxation and sightseeing as the main arrival purposes (holidays and sightseeing). Hence, this group should not be ignored in the tourism development strategy of the Polish Carpathians.

## **THE EASTERN MARKET**

The Eastern Market is one of the most important tourism markets, also for tourism in the Polish Carpathians. After a period of dynamic growth in the late 90s and 2000s, its development was temporarily stopped by the accession of Poland to the EU and the introduction of visas. However, since 2010, a clear upward trend has been observed. For comparison, in 2008, Poland was visited by 6.7 million visitors from Belarus, Russia and Ukraine, in 2013 the number grew to 14.9 million. The main objectives of visits of tourists from Eastern Europe are: business purposes (40%), shopping (20%), VFR (13%) and holidays and sightseeing - 10%. Overall, the visitors from Eastern Europe account for over 33% of the total international tourism in the Polish Carpathians. In the period of 2008-2013, an increase of over 100% of the number of tourists registered in the accommodation facilities in the Polish Carpathians and approximately 50% of the number of overnights has been observed.

In the case of the Eastern Market, the Carpathian tourism is characterized by a dichotomy. The so-called transit lane (the northern rim of the Carpathians) is visited mostly by transit visitors. Cieszyn and Bielsko-Biala are the most important transit cities for the Eastern Market. These cities are visited by over 50% of the total number of visitors from Belarus, Russia and Ukraine. The average length of stay of these visitors is approx. 1.1 days. The second group consists of tourists who visit Polish mountain resorts for recreational purposes. The most popular city among them is Zakopane and its surroundings - approx. 22% of tourists from Eastern Europe registered in accommodation and 39% of overnight stays fall into this category. The other destinations are - in the Beskid Sądecki area - Krynica and in the Beskid Śląski - Wisła and Ustroń. Tourists from Eastern Europe prefer higher standards of accommodation and visit mostly popular holiday resorts. Most of them arrive at the Carpathian Mountains in the winter, especially during their Christmas and New Year Holidays (i.e. two weeks at the beginning of January).

For this market, the tourist products which combine skiing with spa and wellness tourism and water recreation at water parks can be of interest. It should be noted that this tourist market depends on various organizational and legal factors, among others, issues related to obtaining visas. An increasing competition from the Slovak offer is also important.

The Eastern market is a very demanding tourist market and its expectations revolve around the accommodation base of the highest quality in terms of the standard. Further development of this market requires, on the one hand, the efforts to

improve the quality of services as well as facilitating the international tourist traffic within the European Union (e.g. a visa waiver). The cultural proximity will encourage the influx of Eastern tourists. Nowadays, there is a large barrier in the development of this market because of a tense political situation between Russia and Ukraine which is also reflected in the negative trade relations between the European Union and Russia. All this will certainly lead to a significant inhibition of the influx of tourists from Eastern Europe to the Polish Carpathians. It is assumed that this will be, however, only a short-lived change.

## **THE WESTERN EUROPE MARKET**

An important segment of the tourism market in the Carpathians is represented by the group of established EU members, defined in the literature as the EU15. If Germany is excluded, (as it represents a separate market), this group consists of the 14 EU Member States. The share of this group in tourism to the Carpathians is approx. 22%, which corresponds to the value for the whole country. The growing importance of tourists from these countries in Poland has become visible after the accession of Poland to the European Union. This was mainly due to the appearance of low-cost airlines, which in conjunction with favorable pricing, has intensified the influx of tourists from these countries to Poland. The tourists from 3 countries, which account for over 50% of the Western European market, are particularly important. These are the United Kingdom, France and Italy. The specificity of this market is the lack of direct links between regional tourism offers and aims of tourist visits. This particularly applies to individual tourism. Villages in the Carpathians are visited mostly en route, during city-breaks, especially to Krakow. A few days' stay in Krakow is supplemented with a short trip to the Tatra Mountains, the Podhale, the Pieniny, or the places associated with the Pope John Paul II. Currently, more than half of the West European market is concentrated in Zakopane - the best accessible from Krakow mountain resort. Over 60% of Britons visiting the Carpathians, 50% of French and 20% of Italians stay in Zakopane. In the case of Italy, the visits to Bielsko-Biala and the Beskid Śląski, which are associated mainly with the economic connections (the Fiat factory in Bielsko-Biala), are especially important. In recent years, a significant increase of visitors from Italy to Wadowice and Kalwaria Zebrzydowska has been observed. This is associated with pilgrimage to the places related to the life of the Pope. Wadowice is more and more often included in the programme of one-day trips of western tourists who travel outside the Krakow. Oswiecim and Wieliczka have been the most popular destinations outside of Krakow until now.

West European market should be regarded as the most promising in terms of development for Poland. Although in the case of the Polish Carpathians between 2006 and 2013, as in the case of the German market, there was observed a decline in the number of arrivals from these countries (from 40 thous. in 2006 to 27 thous. in 2013) and overnight stays (from 115 thous. to 67 thous.), the estimates indicate that in the next years a nationwide development trend will be observed. It can therefore be assumed that some visitors to Krakow will travel to the Carpathians. In contrast to other markets in the Carpathians (V4, the German market, the Eastern market), measures targeted towards the West European market should cover – in the first phase

- the preparation of offers, related to the stay in Krakow or other cities with LCC connections, in the South of the country such as Katowice, Rzeszów, or Ostrava (the Czech Republic). This will help attract visitors to the region and better present its tourism offer. Then, return trips might be observed, directed to the Carpathian region.

Adoption of direct promotional activities of the Carpathians for the Western markets does not seem advisable at this time, and according to the author, will not provide adequate relationship between the costs and effects of the promotion. Discussing the possibility of impact on the West European market the power of whisper marketing should also be pointed out. The main medium of this type of marketing can become the Poles who had migrated to work to the countries of Western Europe in the last 10 years. Some of them are now coming back to Poland for holidays; these often take place in traditional tourist areas, including the Carpathians. These groups of tourists can bring to the Carpathians other group of guests from abroad. The strength of this attraction will be directly dependent on reliable air networks. This is confirmed by the fact of the significant share of tourists from the UK, compared to other countries in this group, which is associated with the most extensive network of LCC connections between Poland and the UK.

Of course, the Carpathians can also direct their tourism product to the so-called *niche market*. At this point it is worth pointing out the possibility of preparing a unique offer for ecotourists from the Netherlands or a religious offer for visitors from Italy, Spain and other Catholic countries of Western Europe. However, such action seems to be difficult and can benefit only in the long term.

## THE V4 MARKET

Tourists from the Visegrad countries, i.e. The Czech Republic, Slovakia and Hungary are an important target group for the Carpathian tourism. This is due to the proximity as well as the historical and cultural ties, including those from the time of coexistence of these countries in the Habsburg Monarchy. The V4 market has been experiencing a fairly rapid development in recent years. Between 2007 and 2013 the number of visitors from these countries visiting Poland has increased from 11 million to 20.5 million (Janczak, Patelak 2014). Short trips, usually one day, without accommodation dominate. Longer stays of at least 1 overnight are declared by only approx. 2% of the Czechs and Slovaks visiting Poland. However, in the case of Hungarians, dominant tourist arrivals - more than 77% are those with at least 2 days of stay. The main purposes of the V4 arrivals are: classic tourism (over 30%), business tourism (approx. 30%) and VFR (15-18%). While shopping is declared by only 5% of tourists from these countries, the tourism trade has played a significant role in the tourist exchange between Poland and the Czech Republic and Slovakia for many years. In the 1990s and early 20s century, many Poles have organized trips to the Czech Republic, Slovakia and Hungary, mainly to buy food and alcohol products. Cieszyn has become a shopping center for the Czechs and Slovaks, which during one weekend in the 90s of XX century was visited by 20-25 thousand people (Kulczyńska, Mytalowski, Siwek 2011).

The situation has dramatically changed after the accession of Poland and other V4 countries to the European Union. The border trade was no longer profitable. The

re-development of commercial tourism was impossible after the introduction of the euro in Slovakia. Due to the favorable price relations between Slovakia and Poland and the lack of border control, the trips to fairs on the Polish side have become popular with the Slovak: to Nowy Targ, Jablonka, Jasło or Sanok. The visitors from Slovakia started to visit modern shopping centers in the Carpathian cities, including Bielsko-Biała, Krosno, Nowy Sącz and Nowy Targ. However the tourism trade, clearly visible in the area of the Carpathians, cannot obscure the whole picture of the V4 Carpathian tourism.

Analyzing the Central Statistical Office (GUS) data on tourist accommodation facilities registered in the database, it should be noted that the V4 market for the Polish Carpathians have more than three times greater share than for the whole country. This confirms the importance of the V4 market for tourism in the Polish Carpathians. According to data from the Central Statistical Office, the V4 foreign tourists constitute approx. 14.7% of the total number of tourists using accommodation in the Polish Carpathians and their share in the total of overnight stays in the Carpathians is approx. 13.5%. Guests from the V4 countries are characterized by relatively short stays. On average, they spend a little more than 2 days, mostly in the Tatra Mountains and the Podhale region (approx. 35% of tourist traffic). It is worth emphasizing that the Podhale and the Tatra Mountains are the key destination for more than 50% of Hungarians visiting the Carpathians. The Beskid Śląski is also very popular with the V4 visitors, especially with the Czechs living in the Ostrava agglomeration, as well as the Beskid Sądecki which is visited mostly by the Slovaks.

Travel of the V4 tourists is associated with the well-developed skiing infrastructure in Poland. The decisive factor in this case is the distance between the ski resort and the place of residence. In the Carpathians there are several such strong ties in the area - including the Beskid Sądecki with Kosice and the Prešov region in Slovakia, or Wisła, Ustroń and Istebna in the Beskid Śląski with Karviná-Ostrava agglomeration in the Czech Republic or Žilina agglomeration in Slovakia. Trans boundary tourism also plays an important role, involving a complex offer on both sides of the border. Tourists from the V4 countries often go on the other side for a short time, just only to familiarize themselves with the specifics of the neighboring area. Taking into account the current dynamic development of travel between the V4 countries and Poland one has to assume that this market has distinct developmental character, and may in the future become an important segment of tourism in the Polish Carpathians.

Among the potential directions for development, the following should be indicated: the development of recreational and leisure/sports infrastructure, as well as the spa&wellness centers, where the residents of neighboring Czech and Slovak agglomerations of sub-Carpathian - Košice, Prešov, Žilina - Slovakia or Ostrava and Karviná in the Czech Republic can become customers. Cross-border activities should also be intensified, especially in terms of creating a consistent product of the Carpathian tourism. In addition, the specificity of the individual markets should be taken into account. For Slovaks, pilgrimage centers in the Carpathians, including: Kalwaria Zebrzydowska and Wadowice are still very important; for Catholics from Moravia in the Czech Republic - the pilgrimages to Skoczów are important as well. An

interesting cultural offer may refer to the common tradition and history, for example, the proposal of a common pathway of robber culture or the Vallachian culture trail, linked to the pastoral and Vlachs culture.

## CONCLUSIONS

Over the past 20 years, the Carpathian Mountains have gone through significant changes in the function of the tourism market, largely related to the transition from a model of socialist economy to a free market economy model. Transformation in the ownership, both qualitative and quantitative, has led tourism to be more effectively adapted to the needs of a modern traveler. Further development of tourism must respond to constantly changing trends in tourism demand and will lead to the development of new tourism products.

The Carpathians currently exist in the new political environment - no longer as a classical border region, but more as a trans-border area, in which people can quite freely move around. Therefore, the modern model of the development of tourism in the Carpathians must take into account the competitiveness of the offer, not only between localities within the Polish part of the Carpathians, but also between the fragments located outside the Carpathian Mountains, especially in Slovakia and the Czech Republic. Nowadays, competitiveness in tourism has gone beyond national boundaries. The first competitive activities between the Slovak and Polish Carpathians can be easily recognized.

The Carpathians are also important on a European scale. Currently, work is undertaken on establishing similar to the Alpine Convention guidelines for the development of the Carpathian countries - the so-called *Carpathian Convention*. In this document it is assumed that tourism should play a leading role in the economic development of the Carpathians and contribute to maintaining sustainability of this area. Further development of the Carpathian tourism cannot be based only on the domestic tourism market. This article indicates the four main markets of international tourism, which create good opportunities for its development. To make the Carpathians an important tourist destination on an international level, the accommodation facilities need to be improved. The barrier to the development of tourism in the region is under-developed accommodation facilities which are concentrated within a few areas of the Carpathians. Accommodation needs to be spread, including the regions at the Carpathian foothills. The leading problems are still as follows: the under-developed road system, low level of technical infrastructure and high level of air pollution from households.

Current tourism development of the Carpathians goes towards the creation of recreational activities for residents of nearby urban areas, mainly skiing, hiking, spa & wellness and aqua parks. International tourism may create an opportunity for the region to emerge as a destination hosting new tourism products. Promotion of agrotourism and ecotourism, as well as developing an offer built in the rural heritage of the Carpathians, for the international tourism markets is worth considering.

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