

## DIRECTIONS OF ACTIVITIES IMPROVING THE COMPETITIVENESS OF THE TOURIST OFFER FOR TOURISTS FROM RUSSIA AND UKRAINE IN THE POLISH CARPATHIANS. A CASE STUDY OF ZAKOPANE

Łukasz MATOGA<sup>A,B,C,D,E,F</sup>, Aneta PAWŁOWSKA<sup>A,B,D,E,F</sup>, Elżbieta STACH<sup>A,E,F</sup>

*Department of Tourism and Health Resort Management,  
Institute of Geography and Spatial Management,  
Jagiellonian University in Krakow, Poland  
lukasz.matoga@uj.edu.pl*

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- tourism competitiveness,
- tourist offer,
- Russian and Ukrainian tourism markets,
- Polish Carpathians,
- Zakopane

### Abstract:

In recent years the Polish Carpathians have become a place of dynamic growth in the number of tourists from Russia and Ukraine. The local government and private entrepreneurs, recognising the enormous potential of these markets, make investments and projects increasing the tourism competitiveness of the region. The purpose of the article is to identify examples of actions at the local level concerning adaptation of the offer to the expectations of Russian and Ukrainian tourists. Zakopane, the biggest tourism centre in the Polish Carpathians, is presented in a form of a case study. Activities implemented in the region are predominantly commercial, focused on gaining new purchasers of tourism services. Three basic directions of activities can be differentiated: implementing promotional projects, realising infrastructural investments and increasing qualifications of workers of the tourism industry.

## INTRODUCTION

In the era of globalisation, consumer lifestyle and freedom to travel, it is crucial to attract the attention of potential tourists and convince them to arrive. In this regard, the most important issue is to identify the potential target market and the group of target recipients of the tourist offer. One of the most dynamically growing tourism markets in the world is the market of Eastern Europe. It is characterised by high potential for travelling and it has played an important role in the incoming foreign tourism to Poland. In 2012 among the Eastern Europe countries the most attention should be paid to Russia, which recorded a significant increase in the money spent on foreign trips – from \$8.8 billion in the year 2000 to \$42.8 billion in 2012, as a result, this country was ranked 5<sup>th</sup> in the world [27]. This growth in tourism demand occurred mainly due to the fact that for the growing middle class who entered the market a holiday was not a luxury but an essential element of their lifestyle [26]. The second country in Eastern Europe in terms of its travelling potential is Ukraine.

Both in Russia and Ukraine, Poland has been among the most popular foreign travel destinations. Poland's popularity among Russian and Ukrainian citizens is connected mainly with its neighbouring and transit location. Many Russians and Ukrainians cross the Polish borders in order to travel to other countries. However, Poland has recently transformed into a separate tourism destination. According to Central Statistical Office (GUS), 620,000 Russians and Ukrainians came to Poland in 2012, and they constituted 15% of all foreign tourists in

Poland. In 2012, as in previous years, Russia occupied the second position with the number of arrivals to Poland, whereas Ukraine the fourth. The most popular were stays in big cities – e.g. Warsaw, Kraków, Wrocław and Gdańsk, and as far as tourism regions are concerned, the Masurian Lakes District, Pomerania, Polish Carpathians were most numerous visited.

The subject of the growing number of tourists from Russia and Ukraine in the winter season in Poland, especially in Zakopane, is often undertaken in the Polish media and trade press. The purpose of the article is to identify examples of activities implemented by the local government (public sector) and private entrepreneurs (private sector) from the area of the Polish Carpathians concerning the adaptation of the offer to the expectations of tourists from Russia and Ukraine. The focus is on identifying those solutions which are of crucial significance for increasing the competitiveness of tourism products connected with ski tourism, spa tourism and cultural tourism. For a better presentation of the subject, Zakopane, which as far as the tourism is concerned is the biggest winter sports centre in the Polish Carpathians, has been presented in a form of a case study. It should be noted that in spite of the differences in tourism values and socio-economic conditions of individual tourism centres in the Polish Carpathians, the investments undertaken and realised projects will be similar in nature to those in Zakopane.

Competitiveness became an important area of research in tourism in the 1990s. Although initially the term was mainly used for tourism companies, nowadays it is widely used also in reference to regions [8]. The concept of region's tourism competitiveness means the ability to attract tourism and permanent and long-term development of tourist function in the conditions of competition from other tourism regions [20]. The main objective is to get permanent benefits from the development of tourism by all business entities working in a given region, which is associated with the concept of sustainable development [11].

The modern framework for the analysis of territorial competitiveness factors in the tourism sector were presented among others by Dwyer and Kim [6], as well as Ritchie and Crouch [24]. Transport accessibility, natural and cultural values, tourism development or promotion have the key role and they make up the potential and competitive position of a given place [5, 21]. All these factors are the basis of the activities undertaken by the local government and private entrepreneurs for the creation of the tourist offer of the region [12]. Competition processes between tourism destinations are often analysed in the context of the development of some forms of tourism and transport accessibility [4, 19, 23]. Some authors emphasise the importance of a price as the factor affecting attractiveness of tourism destinations to potential tourists [2, 7, 18].

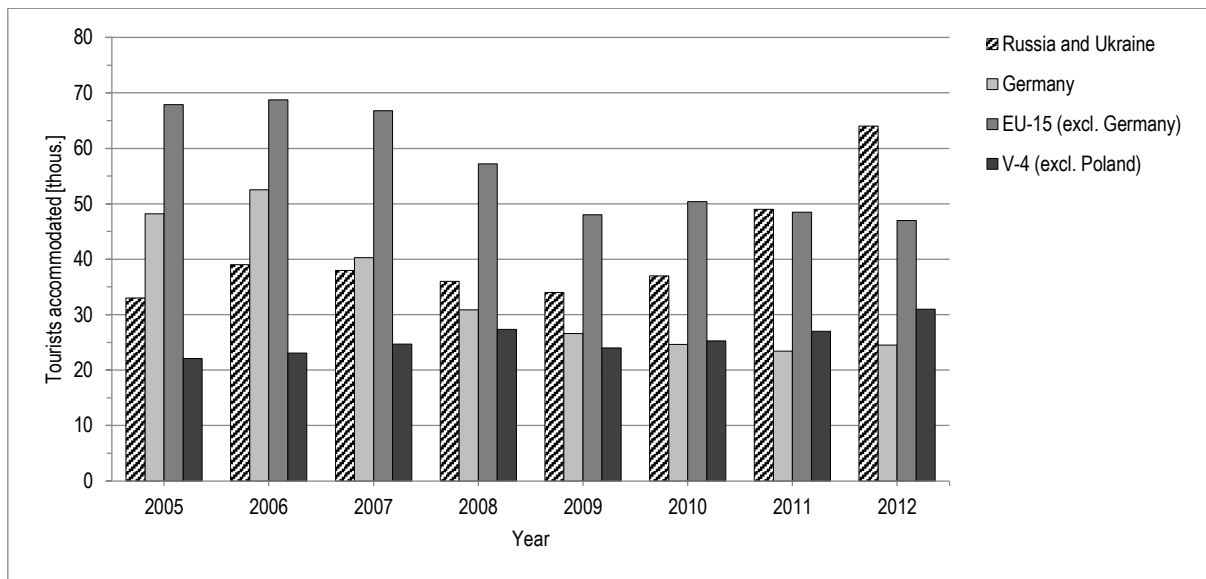
The emergence of a new group of tourists requires adaptation of the tourist offer to their needs and expectations. The concept of territorial marketing makes it possible to effectively compete in the free market economy, where separate areas are treated as products being an integrated collection of characteristics of various quality and usefulness to users, offered by specified territorial units [9]. In shaping the tourism competitiveness of the region it is important to undertake actions for effective management of the territorial tourism product, which consists of, among others, natural and cultural values, tourism development, transport accessibility, services offered by local entrepreneurs and the hospitality of the local people [14]. Many studies put heavy emphasis on creating a positive image, brand distribution and intensification of promotion of tourism destinations [1, 3, 10, 15].

## **ARRIVALS OF TOURISTS FROM RUSSIA AND UKRAINE TO THE POLISH CARPATHIANS**

A big part of the region of the Polish Carpathians are the areas in which tourism is one of the biggest sectors of the socio-economic development [29]. According to Central Statistical Office, in 2012 the region was visited by 2.6 million people, who enjoyed 9.6

million of overnight stays. However, the statistics do not include same-day visits and people coming to their second houses and agritourist houses. A characteristic feature of tourism in the Polish Carpathians is the domination of domestic tourism, which constitutes 90% of the arrivals. Foreign tourists were given about 500,000 places to stay. The ethnic structure of tourists, which is different from the national trend, is worth emphasising. While generally in Poland, Germans were predominant (22% of all foreigners in 2012), in the Polish Carpathians Ukrainians (16%) and Russians (13%) comprised the largest percentage. German citizens (12%) were the third largest group of foreigners who took advantage of places to stay in the region. In the structure of foreign tourists an important role also had citizens of France (4%), Great Britain (4%), Italy (4%), Latvia (4%), Belarus (3%), Lithuania (3%) and from non-European countries – the United States (3%). A relatively small sized was tourism from the Visegrád Group (V-4) – the Czech Republic (5%), Hungary (5%) and Slovakia (4%).

Changes in the size and structure of tourism in the Polish Carpathians have been observed for a few years. In the years 2005-2012 the total number of tourists increased by 22%, but the number of foreign tourists remained more or less at the same level. Notable is the change in the direction of tourist arrivals (Fig. 1). Participation of tourists from the European Union countries (EU-15) considerably decreased, including Germany, while at the same time the number of tourists from Eastern Europe dynamically increased, especially from Russia and Ukraine. In 2012 the Polish Carpathian region recorded a total of about 65,000 tourist arrivals from both countries. It was the most numerous group of foreigners in this region because it constituted  $\frac{1}{3}$  of all foreign tourists. Tourists from Russia and Ukraine were given more than 130,000 places to stay.

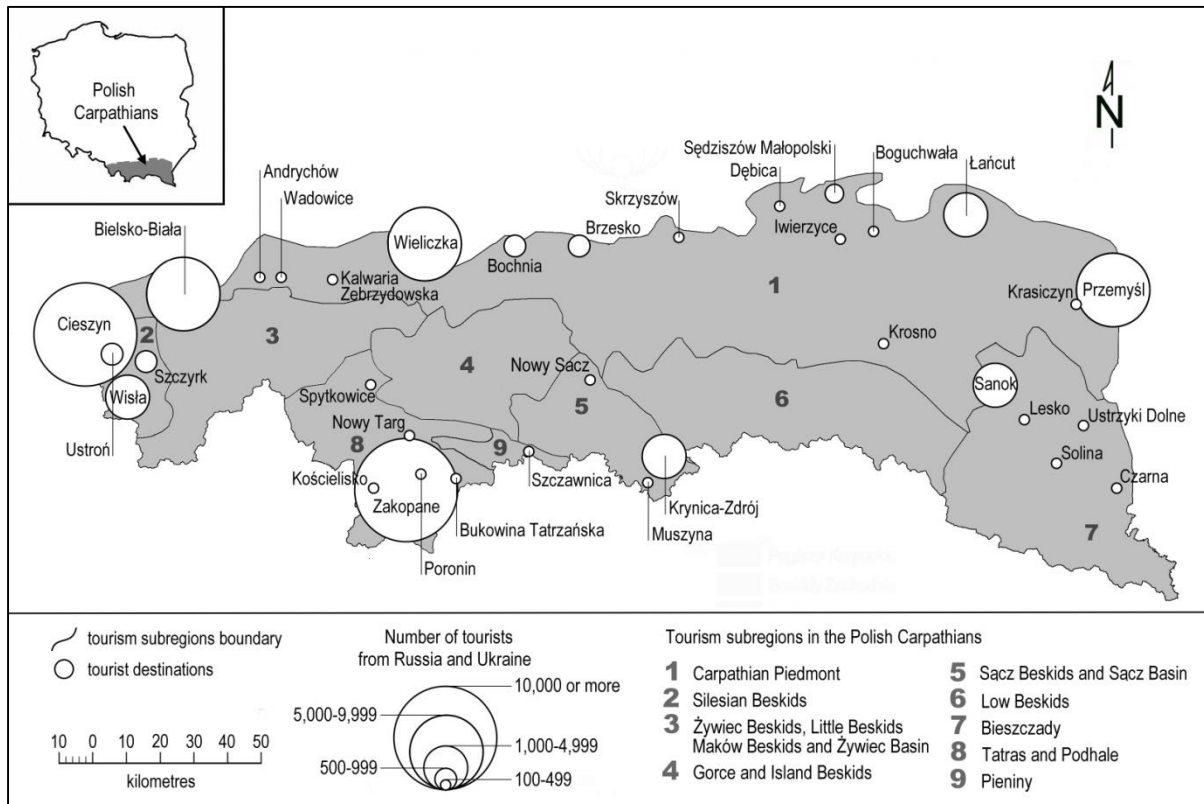


**Fig. 1.** Foreign tourists by country in the Polish Carpathians in 2005-2012  
Source: own analysis based on Local Data Bank of Central Statistical Office.

The greatest intensification of arrivals happened in the summer months. 20% of all overnight stays were recorded in July and August, and in June – 10%. The second peak of arrivals occurred in the winter season when group accommodation facilities registered the highest number of visitors from Russia and Ukraine. This applies especially to late December and early January, that is the New Year and Christmas, which in the Orthodox Church starts on the 7<sup>th</sup> of January. It should be added that the situation was beneficial to local entrepreneurs of the tourism industry because thanks to the tourist from the East, the Christmas and New Year season was extended by several days. Russian and Ukrainian

tourists' stays in the Polish Carpathians are most often short-term and comprise 2 to 3 nights. An average length of stay of Russians and Ukrainians was 2 days. They stayed the longest in health resorts (over 6 days), the shortest in youth hostels (1 night).

Foreign tourists' arrivals to the Polish Carpathians are characterised by an uneven spatial distribution. Russian and Ukrainian tourists preferred to stay in 3 tourism subregions: the Tatra Mountains and Podhale (8), the Silesian Beskids (2) and health resorts in the Sącz Beskids (5) (Fig. 2). Attractive tourist destinations were also transit cities situated next to the main trans-European roads at the northern border of the Carpathians, in the subregion of the Carpathian Piedmont (1).



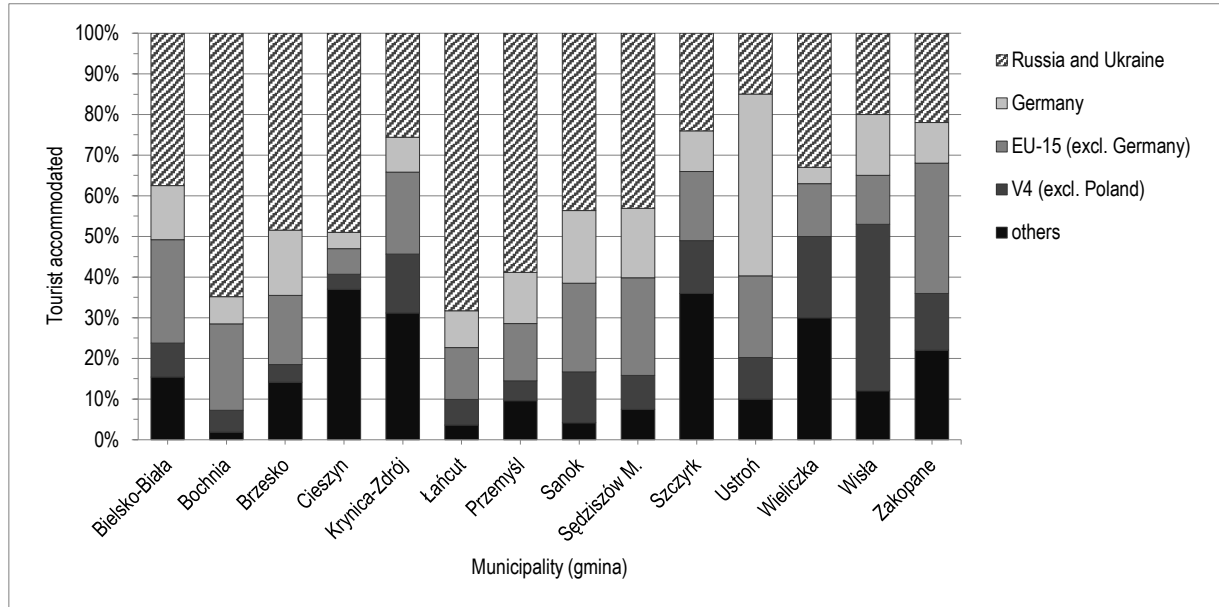
**Fig. 2.** Centres of concentration of tourist arrivals from Russia and Ukraine in the Polish Carpathians in 2012

Source: own analysis based on [13] and on Local Data Bank of Central Statistical Office.

Of 232 municipalities in the Polish part of the Carpathians, 14 ones assemble 90% of the tourists from Russia and Ukraine. Taking into consideration the number of tourists provided with accommodation, these are the following municipalities: Cieszyn (27.5% of all tourists from Russia and Ukraine registered in the Polish Carpathians in 2012), Zakopane (16.9%), Bielsko-Biała (10.8%), Przemyśl (8.9%), Wieliczka (6.5%), Wisła (2.5%), Łańcut (2.3%), Sanok (2.0%), Krynica-Zdrój (1.7%), Brzesko (1.5%), Sędziszów Małopolski (1.5%), Szczyrk (1.4%), Ustroń (1.4%) and Bochnia (1.3%). Tourists from Russia and Ukraine belong to the group of the most common uses of accommodation in these municipalities. In 2012, in 9 out of 14 municipalities surveyed they constituted over one third of all foreign tourists (Fig. 3).

The major tourism destinations in the Polish Carpathians are urbanised municipalities with a high social and economic potential. Among the mentioned ones, 6 municipalities (Krynica-Zdrój, Szczyrk, Ustroń, Wieliczka, Wisła and Zakopane) focus mainly on tourism. Natural values, cultural heritage and tourism development result in tourism having

dominating significance in the local economy. The remaining 8 municipalities are towns characterised by the development of a wide variety of functions, including administrative one, commercial one, communications, industrial production and services. Tourism is a complementary part of the socio-economic life, and at the same time a very important one because a considerable part of the income comes from tourism.



**Fig. 3.** Ethnic groups of foreign tourists in municipalities most numerous visited by Russians and Ukrainians in 2012

Source: own study of the data Local Data Bank of Central Statistical Office

### THE TOURISM MARKET OF RUSSIA AND UKRAINE IN THE RESEARCH OF POLISH TOURIST ORGANISATION

The increasing significance of the Russian and Ukrainian tourism market in the incoming tourism to Poland was noticed in the first decade of the 21st century [16, 17, 30]. This trend was confirmed by the research of Polish Tourist Organisation from 2009 [28]. The most important emission market in Russia was Moscow and Saint Petersburg, while in Ukraine – Kiev and Lviv. The research of POT indicates that this group of tourist includes usually people medium or very wealthy, between 25 and 44 years old. The lowest number of tourists were above 45 years old. Russians and Ukrainians are usually (90%) tourists organising their stay on their own. A considerably low percent of arrivals to Polish Carpathians was realised through travel agencies. The majority travel with families or in the company of friends and acquaintances. They choose hostels or hotels of high quality of services. The basic means of transport for their trip is a car. A air transport is more and more significant, too. For example in 2012, when a regular connection between Kraków and Moscow was opened, there was a 50% increase in the number of arrivals of Russians into this region in comparison with the previous year.

Among the most often listed reasons for coming to Poland of the tourists from Eastern European countries (Russia, Belarus and Ukraine) are purchases (35%), professional and business affairs (26%), visiting friends and family (14%), and tourism (7%) [22]. Poland is seen as a neighbouring, friendly and culturally close country. It is worth noticing that the results are highly influenced by the intensive cross-border tourism of the inhabitants of the Kaliningrad Oblast and the border areas in Western Ukraine. The situation is associated with the agreement concerning the small border traffic, which contributes to the growth of the

number of visitors. The situation is connected to the agreement concerning local border traffic. It allows the inhabitants of the Kaliningrad Oblast and border areas of the west part Ukraine to freely cross the border, which contributes to an increase in the number of visitors.

Surveys conducted in travel agencies in Moscow showed that among the reasons for the Russians coming to Poland were curiosity, especially about the history and culture, geographical proximity, the possibility of skiing, and favourable prices [22]. The respondents drew attention to competitiveness of other tourism regions apart from Poland and insufficient tourist promotion of Poland, visa problems and bad conditions of roads. This is confirmed by reports concerning the Ukrainian tourism market, which also emphasised the low recognition of Polish tourist attractions among the citizens of this country. In the Polish Carpathians tourists from Russia and Ukraine practise almost all kinds of tourism [22]. The most common reasons for their arrivals are sightseeing, relaxation and health improvement. Moreover, stays are largely related to entertainment, practising various forms of active tourism, especially skiing and taking part in cultural and sport events. Tourists willingly use the nurturing and rehabilitation offer of spas, wellness treatment and medical services.

### **ZAKOPANE AS THE TOURISM DESTINATION OF RUSSIANS AND UKRAINIANS IN THE POLISH CARPATHIANS – A CASE STUDY**

Zakopane is an example of a mature tourism centre in the Polish Carpathians, where the biggest number of foreign tourist arrivals concentrates. Zakopane is for Russians and Ukrainians a popular centre of winter sports, which results from a close location in comparison with the major mountain resorts of Western Europe. Transport accessibility could be estimated as satisfactory but insufficient in view of an increasing number of tourists. Within 100 kilometres from Zakopane there is an airport in Kraków. Besides that, airports are located in Katowice and Rzeszów but are of a minor significance for tourism in Zakopane. Zakopane is located within a number of major international routes. The road network is characterised by low capacity, lack of ring roads, a small number of two-lane roads and insufficient number of parking places. The transport accessibility is worsened by the narrow offer of international train and bus connections.

The Polish border with the countries of Eastern Europe, including Russia and Ukraine – is at the same time the external border of the European Union and it is the factor hindering the development of tourism. If citizens of these countries want to cross the border, they have to apply for a Schengen or other tourist visa. Another unsolved problem are too long border controls and lack of an adequate number of border crossings, e.g. in 2012 in 513-kilometre fragment of the Polish-Ukraine border there were just three road border crossings. Because of the need to obtain a visa, tourists from Russia and Ukraine must use travel agencies. A very significant problem is the procedure for obtaining a visa, which limits the tourist activity. This unfavourable situation is being improved by the systematically developed network of visa centres, which in 2012 in Russia consisted of 38 branches and a system of electronic ordering of visas (e-voucher), prepared by Polish Chamber of Tourism. Polish Tourist Club, which functions in Moscow, Saint Petersburg and Kaliningrad, also plays a very important role. The club employees are engaged in very active promotion within the Russian tourism industry and potential clients.

The factor which influences competitiveness of Zakopane in Poland and abroad are well developed accommodation facilities and catering services. In 2012 in Zakopane there were 307 accommodation facilities which had 13,000 places to stay. Hotels accounted for 10% of the accommodation facilities. A big part in the structure of accommodation facilities have private boarding houses, agritourist houses and apartments not included in statistics. The diversification of accommodation facilities is reflected in the varying levels of quality, range and price of services provided. In this context important are currency differences between the

Polish złoty and Euro in Slovakia, which has been national currency since 2009. New investments concerning the accommodation facilities are undertaken by national and foreign investors, including international hotel networks. Similarly, catering services include both chain restaurants of well-known international brands as well as restaurants of regional cuisine.

An important factor favourably affecting on creating and developing of Zakopane's tourist offer are human resources of the local society. It can be seen in entrepreneurship, innovative actions and the ability to flexibly suit the offer to the tourists' needs. Local managers of five and four star hotels – recognising the increasing significance of the foreign incoming tourism – ensure cooperation within associations, whose aim is to create and promote stay packages. The vast majority of the offer of hotels in Zakopane are, however, packages limited to a given building and making it impossible to use recreational services of external companies. These packages do not include admission to tourist attractions, ski passes or discounts for seniors and children, which considerably reduces the competitiveness of the region in relation to the Czech, Slovak and Hungarian offer. Because of the similarity of languages as well as increasing qualifications of the tourism industry employees and the hospitality of the local society, the stay and using the tourism services is facilitated. Actions undertaken in this field are especially noticeable in late December and January, when arrivals of Russians and Ukrainians intensify. At this time managers of accommodation facilities prepare offers dedicated to these guests. Because of the Orthodox denomination of Russian and Ukrainian tourists it is possible to find organisation of Orthodox Church Christmas Eve in the offers of some hotels in Zakopane. Despite the lack of an Orthodox church in Zakopane, in one of the Catholic historical churches there is a Christmas liturgy in the Orthodox ritual.

The manifestation of innovative organisational solutions used for achieving the tourism competitiveness of Zakopane is the local government and private entrepreneurs entering into cooperation within tourism clusters. An example can be the Visit Tatry cluster, created in 2011, to which Zakopane municipality belongs. The aim of the cluster's actions is the cooperation of representatives of the ski and tourism industry to create common, attractive tourist offer and promote a consistent image of Podtatrze. The second solution of that kind is cooperation of the Slovak Cluster Liptov and Biuro Promocji Zakopanego (Office of the Promotion of Zakopane), aimed at common management of the development of the tourism destination in the cross-border area and the promotion of skiing, spa and wellness offer and active relaxation in the Polish and Slovak Tatras. Undertaking initiatives of that kind is significant because the factor called synergistic strengthening influences the competitive strength of a town (Szromnik 2008). The synergistic effect is more intensive when activities undertaken by private entrepreneurs are consistent with the development strategy undertaken by the local government. It enables the intensification of the activities within shaping the local tourism products and undertaking common tourism investments at the local level.

Tourism attractiveness of Zakopane is associated with the presence of many favourable factors, mainly natural, cultural values, developed tourism and recreational infrastructure. These elements enable the development of different forms of tourism, in particular ski tourism, cultural tourism and spa and wellness tourism.

### ***Ski tourism***

One of the most popular forms of tourism enjoyed by tourists from Russia and Ukraine in the Polish Carpathians is ski tourism. Zakopane is the biggest ski station in this region and together with Bukowina Tatrzańska, Kościelisko and Poronin they make a group of tourism centres with well prepared skiing infrastructure. They have a wide recreational offer and are also the place of the development of extreme sports, including mountain biking, paragliding, zorbing, paintball and dream jumping. In Zakopane there are 5 ski centers, which together can boast the biggest in Poland length of pistes (about 41,000 metres) and lift capacity (about

30,000 people/hour). In the neighbouring municipalities of Zakopane there are 12 ski stations with pistes of varying difficulty. Besides that, also elements of infrastructure for other winter sports are being developed, including terrain parks for snowboard and extreme skiing. The importance of Zakopane as a skiing centre is increased by the international sports competition organised here, especially the annual Ski Jumping World Cup competition.

The main factors constituting a competitive advantage of the Zakopane in the context of ski tourism are lower prices than in established European ski resorts and a relatively high quality of services. Pistes are attractive and diverse in terms of difficulty. This infrastructure is accompanied by developed and varied accommodation facilities and catering services, as well as accompanying services – equipment rentals and ski schools with Russian-speaking instructors. Elements improving comfort and standard of services are complemented with modernisation of the infrastructure and designing new pistes. The examples can be the development of comfortable chairlifts instead of ski tows, lighting and artificial snowing of pistes, marking out pistes for snowboarders or introducing the system of ski passes. An important entrepreneurs' activity is also extending the offer for skiers into discount packages for baths in thermal pools and wellness treatments in spa and wellness centres. Cultural and entertainment events complement the offers of ski stations, especially during the period of Christmas and New Year Holidays. A factor decreasing hindering development of the skiing infrastructure are conflicts between land owners and managers of ski lifts. They mainly concern the status of legal ownership of the lands destined for skiing investments, and ecological issues – location next to Tatra National Park. The need to protect the natural environment of the mountain terrains requires activities including sustainable development of the skiing infrastructure.

### ***Spa and wellness tourism***

Nowadays, a very important investment direction in the biggest tourism destinations in Polish Carpathians, are luxury spa hotels. In 2012 in the region, i.e. in Zakopane, there were 32 high-quality spa hotels offering complex health, rehabilitation and accommodation services. They attract tourists with their spa and wellness offer directed to those wanting to physically recover, relax and rest. Apart from that, in the Zakopane an offer of day spa salons is being developed, which offer therapeutic and relaxation services coming from oriental cultures and alternative medicine.

The deposits of geothermal water and therapeutic characteristics of the mountain climate influence the development of the spa and wellness tourism in Zakopane (Aqua Park Zakopane, Polana Szymoszkowa), as well as in the neighbouring municipalities (Terma Bania in Białka Tatrzańska, Terma Bukowina in Bukowina Tatrzańska, Termy Podhalańskie in Szaflary). In 2012 there were 5 objects in Podhale which had a relaxation-recreational function and where one could find geothermal pools and a wide offer of spa and wellness treatments. Such investments increase the attractiveness of the offer of Zakopane in comparison with, e.g. Slovak tourism destinations, where this kind of solutions was implemented a few years ago. An additional convenience for the tourists from Russia and Ukraine interested in Polish spa and wellness centres is providing information about the offer on internet websites in Russian and Ukrainian.

### ***Cultural tourism***

Zakopane has considerable cultural potential in the area, which consists of their long and rich history, numerous monuments of sacral and secular architecture. Furthermore, in Zakopane there is wide offer of 7 museums and 4 galleries. Museums present history of the region, as well as craft and artistic achievements of local artists. The Tatra Museum in Zakopane is very popular with visitors. Promotional activities of museums are supported by



new technologies and innovative solutions implementation, which currently is necessary in the lifting competitiveness of cultural institutions. It is worth to notice that the availability of tourist guides and tourist information in museums in Russian and Ukrainian still remains insufficient and museum offer itself needs promotion targeting foreign tourists.

A very important direction of the undertaken activities within the cultural tourism in the region is creating new thematic trails. Nowadays the most famous are: Szlak Architektury Drewnianej (Wooden Architecture Trail), Szlak Dziedzictwa Kulturowego Podtatrza (Cultural Heritage of Podtatrze Trail), Szlak Tradycyjnego Rzemiosła Małopolski (Trail of Traditional Craftsmanship of Lesser Poland) and Szlak Maryjny Częstochowa-Mariaszell (St Mary's Trail from Częstochowa to Mariaszell). Apart from creating new tourism products, it is also important to appropriately mark them and promote them taking into consideration foreign tourists' needs. The cultural potential is completed with the rich schedule of cultural and entertainment events, such as Międzynarodowy Festiwal Folkloru Ziem Górskich (International Festival of the Folklore of Mountain Terrains) and Dni Muzyki Karola Szymanowskiego (Days of Karol Szymanowski's Music). Since 2010 there has been Międzynarodowy Festiwal Twórczości Artystycznej Dzieci i Młodzieży „Zimowa Bajka w Tatrach” - International Festival of Artistic Creation for Children and Teenagers „Winter Tale in Tatra” (the 6th of January). This event is organised by the Festival Office „Sobytie” from Saint Petersburg, County Office in Zakopane (Starostwo Powiatowe w Zakopanem) and Tatrzańska Agencja Rozwoju, Promocji i Kultury (Tatra Agency for Development, Promotion and Culture). The festival undertakes the cultural exchange between the Polish, Russian and Ukrainian nations and promotion of young talents in various artistic fields. The cultural events of that kind contribute to increasing of the popularity of the region both in the country and abroad.

## **THE PROMOTION OF THE ZAKOPANE ON THE RUSSIAN AND UKRAINIAN TOURISM MARKET**

Growing demands of the recipients of tourism services from Russia and Ukraine and intense competition on the European tourism market pose new challenges for local authorities, private entrepreneurs and other stakeholders in the tourism industry. More and more attention is paid in the Zakopane to the tourist promotion. The promotion of the this tourism destination on the Russian and Ukrainian market includes measures directed both at representatives of the tourism industry and individual tourists from these countries. In the first case, what is significant is participation in tourist fairs, thematic meetings and studio visits. It is then possible to show to Russian and Ukrainian tourist operators the tourist offer of the Zakopane.

An important level of the tourist promotion of the Zakopane in the countries of Eastern Europe are instruments of public relations. International tourist fairs in Russia and Ukraine have become more and more significant in the recent years in the perspective of Polish Carpathians promotion. Representatives of local governments, tourist organisations and private entrepreneurs from the Zakopane and neighbouring municipalities participate in them. In 2012 and 2013 representatives of the regional tourism industry took part in Tourist Fair MITT in Moscow, JANTUR in Kaliningrad, INWETEX in Saint Petersburg, as well as UKRAINE in Kiev. An organisation of a study-tour for the representatives of the tourism industry is worth mentioning (106 visits from Russia in 2012) and a study-press for journalists and people from the opinion-forming environments (43 visits from Russia in 2012) in Poland. They are realised in cooperation with Polish Tourist Organisation and local and territorial authorities. Often these stays initiate contacts with tour operators and airlines interested in introducing the Polish Carpathians, including Zakopane into their offer. Presentations of the Polish tourist offer happen during workshops, seminars and road shows on the biggest emission markets in Russia and Ukraine. The key event of this kind is Polish-Russian Tourist

Forum. By 2013, 10 editions have been held. These are regular meetings aiming at presentation of the Polish tourist offer and initiating cooperation between the Polish and Russian tourism market. During these meetings Russian partners are given information encouraging them to include the Zakopane in their catalogues of the offers of tourist events. Similar events take place also on the Ukrainian tourism market.

Local government and DMOs from Zakopane realise various activities in tourist information. The development of the Internet and information and communication technologies (ICTs) make it necessary to adapt informational actions to the appearing possibilities. It concerns especially preparing language versions of websites for tourists from Russia and Ukraine together with additional functions, including augmented reality (interactive tourist maps, virtual tours of museums, historical monuments, etc.). New platforms with the use of interactive kiosks and mobile appliances are used in Zakopane. Mobile applications are growing dynamically and very often they combine the features of a booking system and complex tourist guide of the region in different languages. This creates new possibilities to reach a potential tourist with the information available almost in any time and place.

## **SUMMARY**

Tourism markets of Russia and Ukraine are gaining significance for the development of foreign tourism in the Polish Carpathians. The conducted analysis of the activities aimed at increasing the competitiveness of the local tourist offer addressed to Russians and Ukrainians makes it possible to establish that they have first and foremost a commercial character. Private entrepreneurs undertake infrastructural investments, especially within luxurious accommodation facilities with spa and wellness background, and objects and tools for ski tourism. Also the local government plays an important role as it can be the initiator of cooperation between the public and private sector. Clusters and associations are created which aim at creating and promoting tourism products. On the example of Zakopane it can be said that in order to adjust the offer to the expectations of Russian and Ukrainian, the local government and private entrepreneurs undertake actions in three basic areas:

1. Marketing – creating stay packages and discount systems in the ski resorts, implementing promotional projects, e.g. participation in tourist fairs, organisation of bilateral industry meetings (e.g. Polish-Russian Tourist Forum), developing system of tourist information in Russian and Ukrainian in analogue and digital form, making reservations and payments for tourism services available on internet sites.
2. Infrastructure – making infrastructural investments, e.g. modernisation and extension of the objects of tourism infrastructure including among others ski stations, high class hotels, spa and wellness centres.
3. Human capital – increasing qualifications of tourism industry employees, for example increasing language and personal-social competences of the employees of tourist information offices, museums, bed and breakfasts, and skiing instructors and tourist guides.

Solutions introduced at the national and international level have a great significance for increasing competitiveness of the Polish tourist offer. It mainly concerns the administrative amenities in the procedure of getting a visa by tourist from East Europe and agreements concerning small border traffic. It is worth emphasising, though, that the Polish Carpathians are unable to compete with the biggest mountain resorts in Europe, especially in the Alps. There are some objective obstacles connected with natural conditions (mainly the features of the climate and landscape) onto which people have no influence. Undoubtedly, the Polish Carpathians have a great significance for the national tourism as well as arrivals from the neighbouring countries, including Russia and Ukraine, thanks to the beneficial geographical

location. To gain advantage over rivalling mountain tourism regions in Slovakia, the local government and private entrepreneurs must enrich and diversify their tourist offer and adjust it to the expectations of the new groups of visitors.

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