

The profile of the two main social tourism segments in Poland

Daria E. Jaremen

Wrocław University of Economics, Poland

Keywords:

Social
Tourism
Market
Senior citizens
Poland

Article history:

Received 5.02.2013
Received in revised
form 25.02.2014
Accepted 28.02.2014

Corresponding author:

Daria E. Jaremen
Wrocław University of
Economics,
Management and
Tourism Faculty

Abstract

Introduction. In Poland, there do occur numerous groups of citizens experiencing tourism exclusion. Among the reasons responsible for such exclusion the following, among others, are listed: age, health condition, family and personal matters, professional issues, but most of all the reasons of economic background. In introduction the article Author tries to explain the notion of social tourism and to identify of its beneficiaries. The objective of the hereby paper is to identify preferences, in the area of tourist activities, expressed by two segments of social tourism, i.e. senior citizens (55+) and the disabled individuals.

Material and methods. The main method of collecting data was survey conducted in two social tourism segments, i.e. among senior citizens (55+) and the disabled. The research was conducting in the first half of 2012. The research sample was relatively large (398 people). It has been formed spontaneously since it depended on the respondents' willingness to take part in the study. The research can be referred to as just a pilot study. The main method of analysis was the analysis of frequency distribution of the respondents answers.

Result. Among the research sample most of the respondents represented senior citizens (64,8%), and 35,2% the disabled. The both responding groups feature high tourist activity, in case of senior citizens reaching the level of 79,9% and in case of the disabled – 75%.

Research shows that profiles (characteristics) of senior tourists and the disabled tourists are relatively similar. Differences concern only: the purpose of tourist trips (seniors are traveling mainly for cognitive purpose, and people with disabilities for resting), the mean of transport (senior citizens more often use the touring coach, and the disabled – private car), the annual average expenditure on tourism per person (senior tourists spend more money for tourist trips than the disabled people), and also much more seniors (43,7%) than the disabled (19,0%) making excursions.

УДК 379.8

Introduction

Social tourism, and its significance for the society and economy, has recently been one of the most extensively discussed problems referring to the European tourist policy. The basic reason underlying the observed growing interest of the European Union countries in social tourism problems is the awareness of social groups experiencing exclusion from participation in tourism or suffering particular problems in meeting their tourism oriented needs, as well as the awareness of demographic, health and economic changes influencing the extension of social groups having limited access to tourism. In EU member states, including Poland, there do occur numerous groups of citizens experiencing tourism exclusion. Among the reasons responsible for such exclusion the following, among others, are listed: age, health condition, family and personal matters, professional issues, but most of all the reasons of economic background. Since 2005 the percentage of population threatened with poverty has been presenting the range between 16% and 17%. In 2010 the highest percentage of poverty threatened citizens was reported in Latvia (21,3%), while the lowest level was recorded in the Czech Republic (9%). In Poland the respective value was at a relatively high level of 17,6%¹.

Eurostat data² illustrate that in 2011 about 37,7% of the European Union citizens did not leave for a 7-day holiday. The worst situation was in Romania (where over 2/3 of its citizens who did not participate in longer tourist trips) while, the best in Norway (only 6,9% of population could not afford a one week holiday). Poland is ranked as 19 among the European Community countries and thus the percentages of Poles reporting their lack of financial resources to afford a week vacation outside the place of their residence once a year, amounting to 60,5%, is significantly higher than the average for 15 “old” EU member states (31,4%) and close to the level recorded for 12 “new” EU members (61,3%).

The exclusion from participation in tourism is also associated with the population aging. *Polish population forecast for the years 2008-2035* indicates that the number of senior citizens in Polish society keeps growing and in 2035 will reach the level of about 23,2%³, which means that every fourth Pole will be at least 65 years old. Based on such measures as life expectancy and healthy life years it has been assessed that within the population of Europeans, who are 70 years of age and over, only every fifth person is in good health and the period of senile infirmity may refer to as many as 38% of the average further life expectancy regarding women over 65 years of age and 27% of the average further life expectancy of men in the same age group⁴.

The social tourism is a phenomenon associated with the participation in tourism of social groups experiencing particular problems in meeting their tourism oriented needs. Such participation is possible or facilitated by the explicitly specified means of social

¹ *Europejskie badanie dochodów i warunków życia (EU-SILC) w 2010 r [The European study of income and living conditions (EU-SILC) in 2010]*., http://www.stat.gov.pl/cps/rde/xbr/gus/wz_badanie_dochodow_i_warunkow_zycia_EU-SILC_2010r.pdf, - access: 25.07.2013).

² <http://appsso.eurostat.ec.europa.eu/nui/show.do>, access: 25.07.2013.

³ *Prognoza ludności Polski na lata 2008-2035 [Polish population forecast for the years 2008-2035]*, Central Statistical Office, Warsaw 2009, p. 182.

⁴ M. Burzyńska, J.T. Marcinkowski, M. Bryła, I. Maniecka-Bryła (2010), *Life Expectancy i Healthy Life Years jako podstawowe miary oceny sytuacji zdrowotnej ludności [Life Expectancy and Healthy Life Years as basic measures for the assessment of population health situation]*, „Problemy Higieniczno-Epidemiologiczne” [“Hygiene and Epidemiological Problems”], 91(4), pp. 530-536.

nature⁵. In many European Union countries the social tourism as the form of activity is organized by associations, foundations, cooperatives and trade unions, aimed at offering opportunities of leisure travelling for the largest possible group of people and especially those originating from the least privileged social groups.

The notion of social tourism appeared in the 50s of the 20th century. At that time, W. Hunziker who claimed that social tourism represents the entire spectrum of relations and phenomena resulting from participation in tourist trips by economically poorer, or in any other way disadvantaged, social groups⁶.

A single and commonly used definition of social tourism does not exist. In the economical literature distinguishes three groups of definitions referring to social tourism⁷:

–definitions concentrated on the demand side of tourism market based on the assumption that the right to practice tourism represents one of the fundamental human rights (*Tourism for all*) and its realization requires undertaking and implementing activities which aim at eliminating barriers in accessing tourism (support of social groups which, for various reasons, cannot participate in tourism on their own),

–definitions pointing to both the demand and supply aspect of tourism market and emphasizing not only social (equal social chances), but also economic significance of social tourism (economic advantages for tourism sector),

–definitions focused on financing sources for social tourism participation and indicating the important role of state budget, budgets of enterprises, social associations and foundations in eliminating various barriers, having in mind these social groups participation in tourism which have limited access to it.

In the European Union countries the following social groups are mainly considered as having limited access to tourism:

- children (pre-school and school goers) and youth (school and academic students),
- people aged 18-30 experiencing unfavourable economic or social situation,
- families in a particular situation (facing financial and other problems),
- the disabled and people with health problems (often accompanied by a caring person),
- senior citizens (depending on the country and the document referring to the problem of social tourism this group is represented by individuals over 50, 55, 60 or 65 years of age).

Two basic segments of social tourism are identified, i.e. senior citizens (55+) and the disabled, which currently amount to the total potential level of about 8,6 million people in Poland⁸ (the total population of Poland in 2011 was 38,5 million people),

⁵ *International Social Tourism Organization Statues* 2003, <http://www.bits-int.org>, access 25.07.2013.

⁶ Hunziker W.(1952), *Social Tourism: Its Nature and Problems*, International Tourist Alliance Scientific Commission, Genewa, p. 1.

⁷ H. Zawistowska, *Możliwości i kierunki rozwoju turystyki społecznej w Polsce*, w: *Wyzwania współczesnej polityki turystycznej. Problemy polityki turystycznej [Possibilities and directions of social tourism development in Poland, in: Challenges of contemporary tourism policy. Problems of tourism policy]*. (edit.) A. Rapacz, Scientific Studies of Wrocław University of Economics 2012 no. 259, Wrocław University of Economics, Wrocław 2012, pp. 109-122.

⁸ Estimations according to: J. Berbeka, *Udział w ruchu turystycznym a spójność społeczna w Polsce – wybrane zagadnienia*, w: *Wyzwania współczesnej polityki turystycznej. Problemy polityki turystycznej [Participation in tourist traffic vs. social cohesion in Poland – selected problems, in: Challenges of the contemporary tourism policy. Tourism policy problems.]* (edit.) A. Rapacz, Prace Naukowe

therefore the size of these segments is quite significant and covers over 22% of Polish inhabitants. The construction of an adequate and meeting their needs offer requires investigating their expectations and requirements. The crucial objective to follow is to prepare a satisfactory tourist product for them which will prevent disappointment or even frustration resulting from an offer featuring lower quality and disregarding their priorities. It often happens that senior citizens and the disabled are referred to, by tour operators, as market segments which can be offered products of lower standard or quality. Preparing a satisfactory tourist offer for these two segments of social tourism requires identification of the characteristics (profiles) relating to socio-demographic features, needs, expectations and preferences of tourists.

Material and methods

For the purposes of the defined research objective realization, in the first half of 2012, a survey in two social tourism segments was conducted, i.e. among senior citizens (55+) and the disabled. The studied sample covered inhabitants coming from four Polish regions, i.e. Wielkopolska (mainly residents of Poznań), Małopolska (mainly residents of Cracow), Podkarpacie (mainly residents of Rzeszów) and Lower Silesia (mainly residents of Jelenia Góra). The selection of units for the study was targeted and based on typical units. The potential respondents were reached in different ways, e.g. through social organizations, associations, clubs and also by means of e.g. the, so called, 'snowball' method. The research sample, to some extent, has been formed spontaneously since it depended on the respondents' willingness to take part in the study. Due to the method of sample selection, the research – even though based on a relatively large sample (398 people) – can be referred to as just a pilot study, which explores the problem of senior citizens and the disabled participation in tourism.

As it has already been mentioned, the underlying information was collected by means of a survey. The questionnaire consisted of 20⁹ substantive and 13 demographic questions. The questions were of open, closed and open-closed nature.

During the research process, the analysis of frequency distribution of the respondents answers were made. The data and results are presented in tabular form.

Results

64,8% of the respondents represented senior citizens and 35,2% the disabled. Among seniors females constituted the dominant gender (nearly 56%). As far as age is concerned the largest representation was included in the age range of 55-65 (61,2%), and therefore it is not surprising that a relatively large percentage of senior citizens participating in the study refers to individuals who are still professionally active (almost 50%). Additionally, 85% of the surveyed sample declared their health condition as good (42%), or average (45%). The majority of senior citizens defined their economic situation as sufficient or good. As far as the disabled respondents are concerned, the gender situation was similar, i.e. females constituted the majority (53%). The disabled respondents' age range was mainly up to 35

Uniwersytetu Ekonomicznego we Wrocławiu nr 259, UE we Wrocławiu [*Scientific Studies of Wrocław University of Economics no. 259, Wrocław University of Economics*], Wrocław 2012, pp. 43-53.

⁹ The number of questions depended on the target group the questionnaire was addressed to (senior citizens – 22 questions, the disabled – 20 questions).

years of age (65,7%). Slightly more than 30% of the disabled respondents were professionally active and 40% were still in the process of learning. In spite of their disability a large percentage of the respondents considered their health condition as good (about 48,7%), or average (38,7%). This group was characterized by a varying degree of disability or dysfunction, mainly referring to mobility system (almost 58%), the hearing organ (deaf-mute and hard of hearing individuals – the total of 14,5%) and the vision organ (the blind and partial loss of sight sufferers – 14,5%).

The research results, presented in table 1, indicate that both responding groups feature high tourist activity, in case of senior citizens reaching the level of 79,9% and in case of the disabled – 75%. This high participation in tourism is mainly determined by the studied sample structure. With reference to senior citizens the noticeable majority of people in the age range of 55-65 was well distinctive and also the visible advantage of people coming from large cities (51,2%) and professionally active individuals (49,6%). Seniors – students of The University of the Third Age (U3A)¹⁰ also formed a large group among the respondents (36,3%). The disabled sample was dominated by relatively young persons, up to 35 years of age (65,7%), living in cities of more than 100 000 residents (51,4%) and evaluating their economic situation as sufficient (45,7%) or good (41,4%).

¹⁰ The University of the Third Age (U3A) represents the component of lifelong learning system in Poland (also in other European and world countries). These are educational institutions, often cooperating with universities and functioning based on their didactic, scientific and material potential. They are appointed for the purposes of senior citizens' knowledge broadening and their social activity stimulation. U3A basic objective is the improvement of senior citizens' life quality by opening opportunities for their participation in interesting lectures, academic classes, social life, cultural and entertaining events, as well as recreation and sport activities. They break with the stereotype referring to old age as the period of just senile and passive existence.

Table 1

Research results

Specification	Senior citizens	The disabled
Number of respondents	258 (64,8%)	140 (35,2%)
Gender of respondents	female – 55,8% male – 44,2%	female – 52,9% male – 47,1%
Age range of respondents dominant in the study	55-65 years of age – 61,2%	up to the age of 35 – 65,7%
Percentage of professionally active respondents	49,6%	30,0%
Place of respondents' residence dominant in the study	city of more than 100 000 residents – 51,2%	city of more than 100 000 residents – 51,4%
Economic situation of respondents	very good – 2,2% good – 36,3% sufficient – 51,4% difficult – 5,6%	very good – 8,6% good – 41,4% sufficient – 45,7% difficult – 5,0%
Percentage of respondents participating in tourism	79,9% (206 people)	75,0% (105 people)
Tourist destinations	mainly Poland – 49,0% Poland and abroad – 44,3% mainly abroad – 6,7%	mainly Poland – 70,5% Poland and abroad – 14,3% mainly abroad – 14,3%
Dominant season of tourist trips	summer – 61,2%	summer – 72,4%
Company during tourist trips	family – 56,8% acquaintances/close friends – 26,7% members of organizations in which the respondent participates – 26,2%	family – 57,1% members of organizations in which the respondent participates – 26,7% acquaintances/close friends – 15,2%
Length of tourist trips	7-14 days – 30,6% 2-3 days – 27,7% 1 day, no night accommodation – 25,2% 4-7 days – 24,3% 15-28 days – 11,7%	7-14 days – 37,1% 2-3 days – 32,4% 4-7 days – 15,2% 1 day, no night accommodation – 11,4% 15-28 days – 5,7%
Most frequently mentioned tourist destinations	sightseeing – 60,2% resting – 51,0% visiting relatives and friends – 28,2% health improvement – 20,9% participation in pilgrimages – 10,0%	sightseeing – 60,0% resting – 82,9% health improvement – 36,2% participation in cultural and entertainment events – 28,6% visiting relatives and friends – 26,7%

Dominant means of transport	touring coach – 69,9%	private car – 60,0%
Dominant accommodation place	hostel – 42,2%	hostel – 33,3%
Dominant way of trip organization	individually – 60,2%	individually – 54,3%
Percentage of respondents taking advantage of a service package	34,5%	10,5%
Most frequently listed ways of spending leisure time during tourist trips	Sightseeing – 79,1% Excursions – 43,7% Sunbathing the beach – 29,1% Resting (sleeping, watching TV, reading books, walking) – 28,2% Socializing – 25,7% Therapeutic treatment, rehabilitation – 22,3% Active recreation and sport – 17,0%	Sightseeing – 61,0% Socializing – 29,5% Resting (sleeping, watching TV, reading books, walking) – 27,6% Sunbathing the beach – 26,7% Active recreation and sport – 20,0% Therapeutic treatment, rehabilitation – 19,0% Excursions – 19,0%
Most frequently listed advantages resulting from tourist trips	Satisfaction – 73,3% Knowledge broadening – 56,3% Health improvement – 47,6% Possibility of taking a break from everyday problems – 44,2% Realization of a hobby, interests – 31,1% Opportunity for meeting interesting people – 33,0% Opportunity for starting a friendship – 15,5%	Satisfaction – 71,4% Possibility of taking a break from everyday problems – 56,2% Health improvement – 41,0% Opportunity for meeting interesting people – 33,3% Opportunity for starting a friendship – 26,7% Realization of a hobby, interests – 20,0% Knowledge broadening – 19,0%
Dominant range of annual average expenditure on tourism per person	1000-2000 PLN (240-480 USD)	0-1000 PLN (0-240 USD)

Source: Authors' compilation.

Conclusion

Analysis of the frequency distribution of the values in the research sample helped to construct a profiles of two main social tourism segments in Poland (table 2). The formation of the profiles was based on the dominant (the most frequent) respondents answer.

Table 2

The profiles of senior citizens and the disabled participated in tourism

Professionally active respondents	YES	NO						
		S	D					
Economic situation of respondents	very good	good	sufficient	difficult	very difficult			
			S	D				
Participating in tourism	YES		NO					
	S	D						
Tourist destinations	mainly Poland		Poland and abroad	abroad				
	S	N						
Season of tourist trips	winter	spring	summer	autumn				
			S	D				
Company during tourist trips	family	friends	other members of the organization in which the respondent participates					
	S	D						
Length of tourist trips	2-3 days	4-6 days	7-14 days	15-28 days	1 day, no night accommodation			
			S	D				
Most frequently mentioned tourist destinations	resting	visiting relatives and friends	participation in pilgrimages	participation in cultural and entertainment events	sightseeing	health improvement		
	D				S			
Means of transport	private car	touring coach		bus	train	plane		
	D	S						
Accommodation place	hotel	guest-house	hostel	relatives/friends house	guest rooms			
			S	D				
Way of trip organization	individually	family/friends	travel agent	employer	social organization	other organization		
	S	D						
Taking advantage of a service package	YES	NO						
		S	D					
Ways of spending leisure time during tourist trips	sight-seeing	therapeutic treatment, rehabilitation	active recreation/sport	resting	socializing	excursions	sunbathing the beach	
	S	D						
Most frequently listed advantages resulting from tourist trips	taking a break from everyday problems	meeting interesting people	hobby, interests	knowledge broadening	starting a friendship	health improvement	satisfaction	
							S	D
Annual average expenditure on tourism per person	0-1000 PLN	1001-2000 PLN	2001-3000 PLN	more than 3000 PLN				
	D	S						

S – senior citizens (55+), D – the disabled, 1 USD = 3,05 PLN (29.01.2014)

Source: the own research.

Having taken a more detailed approach to the analyzed segments' preferences related to travelling, the following phenomena should be reported:

–trips most often made by senior citizens and the disabled mainly cover to the area of Poland (49% - senior citizens and 70,5% - the disabled), domestic and foreign trips are carried out by, respectively, 44,3% of senior respondents and 14,3% of the disabled ones, while only foreign trips are made by 6,7% of senior citizens and 14,3% of the disabled who participated in the survey;

–the most frequently quoted motive for participation in tourism in case of senior citizens was sightseeing (60,2%) and in case the disabled - resting (82,9%). Health condition improvement and rehabilitation was purpose of trip for 20,9% of senior citizens and 36,2% of the disabled, visiting relatives and friends (for 28,2% of senior citizens and 26,7% of the disabled) and in case of seniors – pilgrimages (10,0%), while with reference to disabled people the participation in different events, cultural and entertainment happenings, as well as recreational ones (almost 28,6%);

–the majority of respondents realize their tourist trips in summer season (61,2% of seniors and 72,4% in the disabled group);

–the majority of respondents from both surveyed segments are most often involved in 7-14-day trips (30,6% of seniors and 37,1% of the disabled), 4-6-day trips (respectively 24,3% and 15,2%), 25,2% of the approached seniors participate in one-day trips, while among the disabled short 2-3-day trips are also popular (32,4% of respondents);

–the respondents (in both segments) usually organize their tourist trips individually (60,2% among senior citizens and 54,3% among the disabled), 34% of seniors and 10,5% of the disabled take advantage of ready made packages offered within the framework of tourist services;

–during their trips respondents are most frequently accompanied by family members (56,8% of seniors and 27,1% of the disabled), and/or friends (respectively 26,7% and 15,2%), as well as members of organizations, associations, clubs to which they belong (26,2% and 26,7%);

–in the course of their tourist trips respondents mainly choose hostels as their accommodation (42,2% of seniors and 33,3% of the disabled), hotels are booked less often (respectively 35,4% and 25%), guesthouses (32,5% and 32,1%), or visiting relatives and friends (22,7% and 28,6%);

–touring coach was the dominant means of transport in the group of senior citizens (about 69,9% of travellers), with a private car (49%) and a train (30%) to follow, while the disabled presented reverse preferences – private car (about 60%) to be followed by a touring coach and a train (32,4% each);

–the majority of surveyed seniors spend, on average, 1000-2000 PLN per year on their tourist trips (45,6% of respondents), while in case of the disabled this expenditure is lower and presents the level of 0-1000 PLN (50,6% of respondents);

–while travelling for tourist purposes the respondents spend most of their time sightseeing (79,1% of seniors and 61,0% of the disabled), making excursions (43,7% of seniors and 19,0% of the disabled), sunbathing at the beach (29,1% and 26,7%), resting (respectively 28,2% and 27,6%) and socializing (25,7% and 29,5%).

According to the responses provided, participation in tourism results in numerous advantages for the respondents of which the most important one is the feeling of joy and satisfaction, but also the possibility of breaking away from everyday problems, health condition improvement, opportunities for broadening knowledge (marked mainly by senior

citizens) and also an opportunity to get acquainted with interesting people and start friendships (which is emphasized by the disabled).

Research shows that profiles of senior tourists and the disabled tourists are relatively similar. Differences concern only: the purpose of tourist trips (seniors are traveling mainly for cognitive purpose, and people with disabilities for resting), the mean of transport (senior citizens more often use the touring coach, and the disabled □ private car), the annual average expenditure on tourism per person (senior tourists spend more money for tourist trips than the disabled people) and also during tourist trips much more seniors making excursions (43,7%) than the disabled (19,0%).

References

1. Berbeka J. (2012), Udział w ruchu turystycznym a spójność społeczna w Polsce – wybrane zagadnienia, w: Wyzwania współczesnej polityki turystycznej. Problemy polityki turystycznej. [Participation in tourist traffic vs. social cohesion in Poland – selected problems, in: Challenges of contemporary tourism policy. Problems of tourism policy] (edit.) A. Rapacz, *Scientific Studies of Wrocław University of Economics*, 259, pp. 43-53.
2. Burzyńska M., Marcinkowski J.T., Bryła M., Maniecka-Bryła I. (2010), Life Expectancy i Healthy Life Years jako podstawowe miary oceny sytuacji zdrowotnej ludności [Life Expectancy vs. Healthy Life Years as basic measures for the assessment of population health situation], *Problemy Higieniczno-Epidemiologiczne [“Hygiene and Epidemiological Problems”]*, 91(4), pp. 530-536.
3. Europejskie badanie dochodów i warunków życia (EU-SILC) w 2010 r. [The Euro-pean study of income and living conditions (EU-SILC) in 2010], Available at: http://www.stat.gov.pl/cps/rde/xbcr/gus/wz_badanie_dochodow_i_warunkow_zycia_EU-SILC_2010r.pdf
4. Available at: <http://appsso.eurostat.ec.europa.eu/nui/show.do>.
5. Hunziker W.(1952), Social Tourism: Its Nature and Problems, *International Tourist Alliance Scientific Commission*, Genewa.
6. *International Social Tourism Organization Statues 2003*, Available at: <http://www.bits-int.org>.
7. (2009), *Prognoza ludności Polski na lata 2008-2035 [Polish population forecast for the period of 2008-2035]*, Central Statistical Office, Warsaw.
8. Zawistowska H. (2012), Możliwości i kierunki rozwoju turystyki społecznej w Polsce, w: Wyzwania współczesnej polityki turystycznej. *Problemy polityki turystycznej*, [Possibilities and directions of social tourism development in Poland, in: Challenges of contemporary tourism policy, *Problems of tourism policy*], *Scientific Studies of Wrocław University of Economics*, 259, pp.109-122.