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## **AN ANALYSIS OF CONTEMPORARY TRENDS IN THE AGRITOURISM MARKET IN POLAND**

### **Summary**

The degree of future development of agritourism will be strongly influenced by fashion trends that are dictated by the contemporary market. Changing lifestyles of the society, which manifest themselves in the pursuit of buying greener products and seeking unconventional ways of spending free time will further develop this service. Continuous improvement of service offers and introduction of more interesting forms of recreation that guarantee higher quality of services should become key goals for individuals involved in agritourism. The potential of agritourism is slowly being recognized, although in comparison to other forms of accommodation, still a rather small number of Polish tourists choose it. There is therefore a necessity to develop a marketing plan to make agritourism services more distinguishable on the local and foreign tourism markets. In order for rural areas to develop and to provide rural communities with additional sources of income, it undoubtedly seems necessary to differentiate between rural tourism and agritourism.

**Key words:** agritourism, trends, categories of tourists, destinations

### **INTRODUCTION**

Rural tourism, and especially one of its core segments, which is agritourism, has become well established on the domestic tourist market. Rural households are increasingly offering various recreation services [Strzembicki, 2002a], which is why the agritourism service market is becoming increasingly competitive and thus more challenging for service providers. At the same time, purchasers of services are becoming more demanding and aware of their expectations and rights [Jaremen, 2002]. All who understand the essence of market economy realize that the recognition of the demand for goods and services is the basis of the economic development strategy [Perepeczko, 2003]. This also

applies to agritourism. The development and creation of its more distinguishable image will be accompanied by continuous monitoring of supply and demand changes on the agritourism market.

## **THE SCOPE AND METHOD OF THE STUDY**

The aim of this paper is to present agritourism market trends in Poland. It seems important to pay attention to these issues because of the increasingly popular active holidays or holidays that offer active recreation. There is a growing demand for this type of leisure in Poland, where agritourism farms provide ideal opportunities. Hosts who undertake a non-rural activity lead contemporary agriculture in a completely new direction. They often shift entirely from agriculture towards agritourism services. Although this tendency distorts the essence of well-recognized “agritourism”, the most significant issue is that non-agricultural activity is being developed in rural areas. Considering passive lifestyles of local communities, resulting from the attachment to “the earth”, the developing agritourism is a positively perceived manifestation. However, among the forms of rural tourism, it is actually agritourism that enables to preserve the agricultural character of households and maintain family traditions; it enables to become familiar with local customs and all the characteristics of the surroundings.

The examples presented are based on our statistical data, which has been collected through interviews with 78 owners of agritourism farms in the Kujawsko-Pomorskie province (the interviews focused on the types of tourists who book the quarters, the length of stay and accommodation conditions and main attractions) and on publications concerning the subject. The authors also used documentation from the Central Statistical Office and the Institute of Tourism in Warsaw.

## **RESULTS AND DISCUSSION**

The shift of labour from the agricultural sector to the business non-agricultural sector was described in detail in the latest Agricultural Census (PSR) conducted in 2010. However, the results will be published at the turn of 2011/2012. Hence the authors will make use of the PSR Report 2002 [the PSR Report 2003] whilst discussing these issues. It allows one to analyse changes over the years 1996-2002, the period in which the principles of the market economy and the resulting consequences for the country stabilized.

A major trend in the agricultural sector is the increasing decline, concerning the entire agricultural area, to 16.9 million ha (Mha) from 17.9 Mha, i.e. 5.5%. The size further declined in 2005 (to 15.9 Mha) by 5.9% compared to

the year 2002. In the period between censuses (1996-2002) the number of farms declined by 3 million 66.5 thousand, to 2 million 933.2 thousand. In 2005 this figure was already reduced to 2 million 733.4 thousand and in comparison with 2002, it decreased by 8.7%. It is also worth mentioning that during this period significant changes in the structure of the sown area occurred. The acreage declined from 12.3 Mha in 1996 to 10.8 Mha in 2002. The following three years saw an increase of 4%. The above-mentioned analysis demonstrates that the agricultural activity of farms decreased quite significantly.

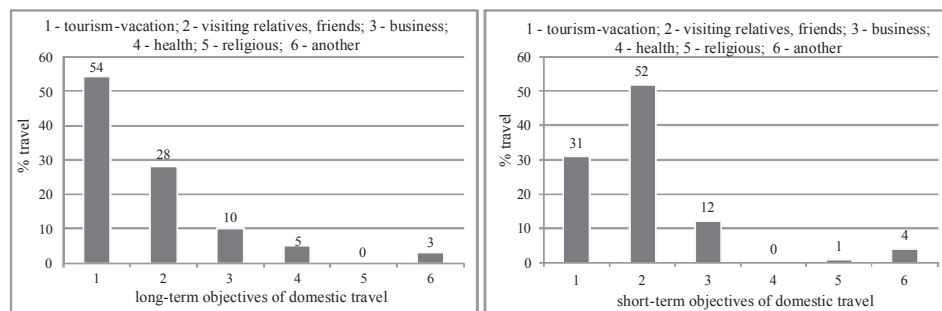
The economic decline of agriculture was largely influenced by deteriorating price relationships and stabilized production level. Due to the low production profitability, some farms began to withdraw from agricultural production and some began to seek additional sources of income in other economy sectors.

Compared with the PSR results for 1996, the number of farms involved in the non-agricultural business increased from 249 thousand to 363.4 thousand in 2002, i.e. by 46% [*Non-agricultural activity of farms*, 2003]. Farms are currently a major source of income for about 600 thousand families. It probably is not satisfying for everyone, therefore in order to diversify employment and income of these families, certain conditions and incentives are provided [Cichowska, 2008].

According to Pytlos [2004], contemporary agriculture has to be accompanied by agritourism. For this reason, systematic research of the Polish agritourism market has been undertaken. The phenomenon of the development of this activity especially intensified after the period of domestic political transformation. Trend researchers often wonder how the demand for agritourism services will continue to develop and what potential it will reach in future. The development tendencies are definitely influenced by not only the above-mentioned economic situation of farms but also various and growing needs regarding types of leisure activities which are considered ecologically friendly, unlike mass (commercial) tourism.

In regard to travel destinations of Poles, we have observed that in the case of long-term trips (5 or more days), tourist-recreational ones are mainly preferred, and in the case of short trips (2-4 days) relatives and friends are main destinations. Data from 2010 is shown in Fig 1.

Please note that there has been a breakthrough in the attitude and mentality of contemporary tourists which has been reflected in the growing environmental awareness, travel experience, requirements for service quality and a more selective choice of destination. Agritourism is not only considered to provide new jobs but also create a new leisure style. Most recipients are residents of Polish cities and there has been a rise in the number of international tourists as well. Country holidays, far away from the city hectic life, are becoming the specialty of the Polish countryside which has been providing increasingly attractive and diverse offers over the years.



Source: own study based on data from the Institute of Tourism [www.intur.com].

**Fig. 1.** The objectives of the domestic long-term and short-term travel (%) in 2010

Some general trends in the Polish agritourism can be distinguished. Firstly, it is a form of recreation designed to attract not only the most affluent but majority of the society. Purchasers of agritourism services come from varied backgrounds in terms of their age, profession, education and place of residence.

Sociodemographic variables have a significant impact both on the participation in agritourism and on ways of travelling. It seems important to learn the preferences of the participants. Tourists who choose country recreation are driven by different motives and have therefore different expectations about the offer. Knowledge of motives behind visiting rural areas considerably encourages the development of the forms of business meant to satisfy most customer needs.

This knowledge has undoubtedly also practical significance, as it allows to conclude and predict what agritourism market trends will develop in the near future. Potential visitors are nowadays looking for pollution-free areas, opportunities for contact with nature, contact with a regional culture and active participation in everyday farm life. Agritourism is increasingly considered to have an educational value, especially for children and adolescents [Pytlos, 2004]

Surveys conducted by Strzembicki [2002] in late July and September 2002 (in eight provinces and a group of nearly 750 purchasers) revealed that 40-49 and 30-39 age groups are the most frequent visitors of agritourism quarters. 20-29-year olds constitute a relatively large group of visitors. As far as their education levels are concerned, most of them have higher or secondary education. The tourists consider their financial situation to be good and they usually come from large urban centres.

Most holidaymakers visit agritourism farms twice or even more frequently (59% in Dolnośląskie province, 58.8% in Lubuskie and 58.4% in Warmińsko-Mazurskie). The highest rate of tourists that visited agritourism farms for the first time was recorded in Kujawsko-Pomorskie province (55.4%) and Pomorskie (50%). The type of accommodation that tourists usually chose was a guest room in hosts' residential building (68.6%). As Strzembicki [2002]

pointed out, this decision does not result from their independent choice but is a consequence of the structure of rural accommodation facilities. Independent holiday apartments (18.5%) and summerhouses (9.4%) were chosen much less frequently. In terms of visitor categories, the quarters were mostly visited by entire families, making use of full board and organising their stay themselves.

Similar findings were provided by studies performed in the Kujawsko-Pomorskie province. The studies show that the main group of agritourism customers are also families, as it was reported by 86.6% of respondents. The second largest target group consists of young people (50.6%). Numerous farms (48% of the total) are also visited by hobbyists (such as mushroom pickers, anglers and nature lovers), senior citizens and pensioners (45.3%) and foreigners (45.3%). However, taking the total number of visitors into consideration (20,630 individuals), majority of them are young people (46.7%), then hobbyists (12.5%) and entire families (12.4%). They are followed by seniors (8.0%) and other other groups of tourists such as married couples without children, grandparents with grandchildren (6.2%) and foreigners (4.1%). Guest rooms are usually available in hosts' residential buildings (46.7%), detached buildings located on the grounds (15.6%) or in farm buildings converted into quarters (15.6%). Families stay the longest (more than a week), followed by senior citizens and pensioners (5-6 days) and the youth (6 days).

On the basis of these observations, it can be concluded that the group of agritourism service recipients has changed. It is not true that this type of recreation is addressed to seniors (aged 60 or more) or less affluent individuals, as it used to be hypothetically assumed. Agritourism is for a variety of recipients and the number of youngest tourists (up to 29-years-old) is much larger than the group of seniors.

A feature of contemporary tourists is also greater mobility, they can afford (far away from the urban world) to learn about the natural and social life of the countryside and thus enjoy considerable sociological merits. Fostering values such as respect, modesty, sensitivity, curiosity and solidarity [Mose, 1992] has a positive impact on the shaping of attitudes and new travel trends.

In addition to the above-mentioned observations, the authors of the paper have noticed growing expectations regarding the service quality level. The potential client is mainly interested in what the farm is able to offer and whether the price reflects the service quality. Tourists definitely prefer to buy a complete package of services (accommodation, meals, attractions etc.) available at a single price. Nonetheless, the choice depends on whether the farm is visited by a single person, whole family, young people or another group of holidaymakers. Expectations regarding the sanitary standard of the agritourism facilities are also rising. The level is currently insufficient and clients demand independent access. Unsatisfactory condition of sanitary units is often one of the reasons for a lower demand for such services. The reduced quality of sanitary facilities was observed in the Kujawsko-Pomorskie countryside. Only 32.1% of households had rooms equipped with bathrooms and toilets. Most service providers (76.9%)

had toilets and bathrooms located in halls. However, hosts (46.1%) try to ensure the best accommodation conditions by adding, apart from board and lodging, other elements (such as recreational equipment rental and organisation of extra curriculum activities) to the agritourism service package.

Agritourism customers were initially less demanding. Today, changes in contemporary lifestyle and, as a result, changes concerning travel destinations, experience gained by tourists in regard to the choice of competitive domestic and foreign offers have resulted in the necessity to continuously improve the quality of the services offered. Thus, one of the trends characterizing the demand on the Polish agritourism market is the pursuit of higher quality, which is reflected in the diversity of the supply.

Agritourism has occupied a minor role in the domestic tourism as majority of tourists prefer to visit their relatives and stay at hotels, boarding houses and health resorts.

In 2005 only 5% of tourists participating in long-term travel chose agritourism accommodation, which was 1% more than in 2010. In the case of short-term trips the figures did not change (2% in 2005 and 2% in 2010). Altogether in 2009 7% of customers chose agritourism, which was an increase of 1% compared to the following year (Table 1).

**Table 1.** Types of accommodation for domestic tourist destinations in the years 2004-2010

Sn.	Type of accommodation	Long-term travel*				Short-term travel **			
		(%)				(%)			
		2004 ***	2005 ***	2009	2010	2004 ***	2005 ***	2009	2010
1.	hotel	7	7	7	8	12	13	14	12
2.	guesthouse	6	8	4	15	3	5	7	7
3.	resort	6	6	10	10	2	2	2	3
4.	house of creative work	1	1	-	-	2	-	-	1
5.	shelter, a youth house	2	3	1	1	3	2	2	1
6.	sanatorium	7	4	3	4	3	2	-	-
7.	<b>agritourism quarters</b>	<b>2</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>2</b>
8.	other accommodation	8	9	10	8	3	3	3	4
9.	camping	3	2	3	3	1	1	2	2
10.	free tent (trailer)	3	4	1	2	2	2	2	2
11.	chargeable tent (trailer)	3	1	2	1	1	4	1	1
12.	houses for relatives in the countryside	21	17	15	13	25	26	23	21
13.	houses for relatives in the city	25	23	22	23	34	31	33	38
14.	house on a plot	4	5	5	5	5	4	6	5
15.	another	2	5	2	3	3	3	3	1

\* long-term stays (for 5 or more days) \*\* short trips (2-4 days) \*\*\* The study was conducted on a representative sample of Polish population aged 15 and over (4067 completed questionnaires).

Source: own study based on data from the Institute of Tourism in Warsaw [www.intur.com.]

According to Szarek [2006], in 2000 70 000 people in Poland visited agritourism farms. Taking over 10 000 agritourism quarters into consideration, each of them was visited by an average of 7 people, staying there 3 days on average (Table 2).

**Table 2.** The number of people using agritourism facilities in Poland in 2000

Province		Number of beneficiaries	Number of nights provided	The degree of the utilisation of beds
<b>Poland</b>		<b>70318</b>	<b>298797</b>	<b>14.0</b>
1.	Dolnośląskie	54032	54032	13.4
2.	<b>Kujawsko-pomorskie</b>	<b>15977</b>	<b>15977</b>	<b>16.2</b>
3.	Lubelskie	17515	17515	10.1
4.	Lubuskie	19487	19487	18.4
5.	Łódzkie	7201	7201	15.6
6.	Małopolskie	42309	42309	10.7
7.	Mazowieckie	3024	3024	13.8
8.	Opolskie	836	836	16.4
9.	Podkarpackie	30183	30183	12.6
10.	Podlaskie	16099	16099	24.1
11.	Pomorskie	30095	30095	21.4
12.	Śląskie	9463	9463	24.8
13.	Świętokrzyskie	3167	3167	10.5
14.	Warmińsko-mazurskie	8086	8086	20.4
15.	Wielkopolskie	29829	29829	11.0
16.	Zachodniopomorskie	1938	11494	17.3

Source: Szarek S., 2006. *Outline of economics and organization agrotourismo.*

Publisher: the University of Podlasie, Siedlce, p. 20.

In view of statistical data, it should be emphasized that agritourism frequency is hard to estimate, as service providers are not obliged to provide any reports. They only have to register their quarters. The data is hence inaccurate (i.e. too low) and does not reflect the actual situation.

Agritourism as part of rural tourism should be subject to continuous observation. People who come from cities and are not permanent residents of rural areas are increasingly undertaking agritourism business. It is pointless as agritourism was originally designed to support farmers who needed to improve their financial situation. Nowadays frequent fake imitations of agritourism business, without any agritourism features, can be observed, as the research conducted by the authors confirmed. It revealed that 19 (23.4%) out of 78 households resigned from agricultural activity. In accordance with the definition of agritourism provided by Drzewiecki [2002] (a form of recreation in rural agricultural areas, based on accommodation facilities and recreational activities connected with agricultural, or equivalent, households and their



natural, manufacturing and service surroundings) lodging and recreational activities associated to a farm or equivalent, manufacturing and services) these households should be regarded as part of rural tourism. And although the concept of agritourism has different meanings, depending on the region of the world, Davis and Gilbert [1992] believe this non-agricultural activity should be associated with an active farm. Most respondents (46.2%) from the Kujawsko-Pomorskie countryside consider this to be a crucial element. The opportunity for visitors to participate in agricultural activities is seen as very important and one of the main farm attractions.

Socio-economic changes will probably continue to shape the agritourism product in future, however its further successful development will depend on legal and marketing mechanisms existing on the market. Trends indicate that demand for such services continues to rise. Firstly, numerous individuals prefer independent forms of holidays. Secondly, they seek to fulfill specialized interests, and thirdly there is a common tendency to travel in an independent, individual manner in order to explore unknown places [Majewski and Lane, 2003] which are not necessarily distant. This does not necessarily have to be too distant of travel. Moreover, the contemporary lifestyle of societies and the creation of new awareness regarding the consumption of specific food items have fostered a new trend - the demand for high-quality products. They satisfy individual needs and expectations of clients and they are not commercial – clients realize that and are willing to pay high prices. Therefore, it seems essential to continuously improve service quality and create the tourist image of the area by paying attention to the importance of agritourism for local economy and prosperity.

Moreover, another important aspect of our discussion should be recognised. Namely, agritourism can become an ambivalent phenomenon, resulting in both positive and negative consequences for the rural environment. The size and type of threats to the environment will depend on the scale of tourism, forms of tourism activities undertaken by visitors and the size and scope of business. It is therefore necessary to monitor its development and eliminate everything that may have a negative impact on the quality of agritourism services, trying to increase the satisfaction of tourists.

An undeniable fact is that – as remarked by Niezgoda [2000] – tourist supply, provided by rural tourism, is consistent with the prevailing trends to give tourism an environmental dimension. Therefore, the development of tourism in Poland, which is to comply with European trends in terms of the demand and supply - cannot ignore rural tourism. Without doubt, tourism should continue to be an important activity supporting primary business (i.e. agricultural activity) or an alternative to agriculture in rural areas [Matys and Nikiciuk, 2002].



In conclusion, it should be emphasized that this young branch of tourism has a positive impact on the economic situation and its spontaneous development not only provides additional sources of income for agricultural families, but it is becoming, and will probably become an asset in the future Polish countryside.

## CONCLUSIONS

1. The domestic development of market economy will continue to encourage the search for new income-earning opportunities (including agritourism) for people involved in agriculture.

2. The properly developed agritourism tourism product should focus on high-quality services that will meet the expectations of potential purchasers.

3. To maintain the essence of agritourism, it should be associated with active farms. Thus, an important tendency should be to focus on maintaining authenticity of the service, reflecting the substance of rural life through its unique character.

4. There is a necessity to continuously monitor the development of this activity, both in terms of supply and demand. This will facilitate better evaluation of needs and desires of consumers and understanding of the market segmentation relating to the choice of travel and recreation destinations.

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