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Contemporary trends in the hotel industry and international tourism

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Opportunities and threats of tourism industry development in the 21st century – prognosis

Summary

The aim of the present article is to attempt to create the picture of opportunities and threats of tourism industry development in the 21st century. The picture emerges on the basis of data included in the subject literature. The first and the most important obstacle was the lack of information on this issue. It is quite scarce in fact. This is why, the author's analysis had to be based on information obtained during workshops led by the Polish Scientific Associations of Recreation and Tourism Animation as well as seminar classes in tourism.

Drafts included in the paper show directions of research undertaken by the author with the aim to be continued in the following years.

Szanse i zagrożenia rozwoju gospodarki turystycznej w xxi wieku – ujęcie prognostyczne

Streszczenie

Zadaniem niniejszego artykułu jest próba stworzenia obrazu szans i zagrożeń rozwoju gospodarki turystycznej w XXI wieku, jaki wyłania się na podstawie danych zawartych w literaturze oraz z przeprowadzonych badań ankietowych wśród turystów na ten temat. Nie było to zadanie łatwe. Pierwszą i najważniejszą przeszkodą stanowiło znaczący brak informacji dotyczących tego interesującego zagadnienia. Wbrew pozorom jest ich niewiele. W tej sytuacji autorowi nie pozostało nic innego, jak oprzeć się w swojej analizie na informacjach uzyskanych z warsztatów prowadzonych przez Polskie Stowarzyszenie Naukowe Animacji Rekreacji i Turystyki wśród 917 ankietowanych turystów oraz z zajęć seminaryjnych prowadzonych ze studentami z zakresu turystyki.

Zamieszczone w opracowaniu szkice w wielu przypadkach wskazują kierunki badań, które autor podjął z zamiarem kontynuowania ich w najbliższych latach.

Radosław SZAFRANOWICZ-MAŁOZIĘĆ

FAMILY HOLIDAYS - CONTEMPORARY TRENDS IN POLISH TOUR OPERATORS' OFFER

Introduction

„The first decade of the 21st century has brought vital changes in tourism. We are dealing with a new tourism type which is defined by means of 3E rule¹ and with a new type of tourists. According to various reports, analysis and prognosis the image of a *new tourist* emerges. He/she will be more experienced in travelling, easily adjust himself/herself to new conditions and be more aware of his/her needs. This will be a better educated tourist with aptitude for learning. A new tourist will need more amusement and adventure but also his/her possibilities of satisfying all of those expensive needs will be greater².

Tour operators to make their tourist product more attractive and tailor-made for the customers began preparing profiled offers which meet the expectations of a given target group. Taking into consideration the fact that almost 1/3 of Poles going on a journey (5 days and more) takes with themselves the youngest family members, the great majority of tour operators decided to implement a new product intended for families with children into their offer.

Parents began to put more emphasis whether the hotel is “friendly for families with children”; pay more attention to its distance to the beach, beach conditions (sandy, sand-gravel, gravel, shingle, rocky), rooms standard (size, opportunity to book a family room), building infrastructure (playground, mini club, paddling pool, aqua park, slides) or board (numerous restaurants are equipped with high chairs, bibs, offer special menu for the youngest and the great majority applies all inclusive form which allows to avoid additional expenses, e.g. ice-creams and beverages).

An increasing number of tour operators in a special way select the hotels which they subsequently offer their customers. While choosing a hotel for a family offer they take into consideration the needs of travelling parents aiming to provide the maximum degree of relaxation comfort. Such hotels with no additional costs are frequently equipped with, e. g. a cot with mattress and bedclothes for a small child, additional pillows and blankets, bottle warmer, kettle, humidifier, plastic dishes and cutlery for children, electrical socket, windows and balcony doors security, baby changers, access lock to the adult channels etc. Family friendly hotels give also a thought to removing glassware from tables, plants are well as other object which are dangerous for children.

A vital part of hotels for families offer is an available animation program which will keep the youngest holiday-makers amused and their parents will give an opportunity to have a rest. While spending holidays in foreign resorts, where hotel animation has been popular for many years, Polish tourists did not feel comfortable seeing and listening to programs in the foreign language (in majority English and

¹Reguła 3E (Entertainment, Excitement, Education – rozrywka, ekscytacja, kształcenie).
²P. Litwicka, *Metodyka i technika pracy animatora czasu wolnego*, Kraków 2011.

German). Polish tour operators have noticed that discomfort and made an attempt to meet the customers demand by introducing animation in Polish into their offer.

By combining several factors which became vital as it comes to families with children choice of tourist offer, the tour operators prepared a proposal which is fitted for that target group.

The development of Polish tour operator's family offer

One of the vital factors in preparing a family offer is animation. *Animation is intentionally guiding people during their free time by means of engaging them directly into a given activity. The aim of animation understood in such a way is to fill the free time with values which give the chance to satisfy human needs*³.

In Poland animation for many years has been associated with so-called "ka-owiec" (from the abbreviation KO – kulturalno-oświatowy, which is cultural and educational) – in the Polish People's Republic it was a cultural and education instructor who during various events (balls, ice breaking parties, trips, vacations and mushroom picking) took care of proper amusement. Larger workplaces as well as holiday resorts employed their own "ka-owiec".

*Free time animation is a type of holiday services – still relatively unknown in Poland but widespread in other countries. While hotels in our country offer standard of two services: accommodation and board (usually extra paid), foreign hotels, on the other hand, in southern Europe, northern Africa and other resorts most frequently guarantee as standard: accommodation, board (frequently in All-Inclusive form) and animation*⁴.

*Three, four, five star hotels abroad employ hundreds of sports animators all over the world who are supposed to make guests' stay in a resort more pleasant. Obviously the fundamental motivation for employing sports animators is creating a positive hotel's image and an attempt to encourage tourists to make use of the same "checked" hotel in the next year*⁵.

*A forerunner of animations for Polish tourists was Scan Holiday. By introducing the first animators into foreign directions they have formulated a new concept of an extended tourist product. Hotels and resorts even during one season became the most popular destinations among Polish tourists. In the following years animation was almost the deciding factor as it comes to the choice of a hotel by a customer*⁶.

The second company which decided upon animation as a method of making their offer more attractive was Neckermann. For 16 years this tour operator has been creating the „Happy Events” brand.

The two above mentioned were followed by other tour operators. Rainbow Tours introduced Polish animation to their offer in chosen hotels several years ago; initially it was 5-6 hospitality facilities from the whole offer but in 2012 tour operator has developed this concept, named it "Figlokluby" and more than 20 animation

³ T. Wolańska, *Rekreacja – encyklopedia zarządzania*, Warszawa 1989.

⁴ J. B. Bączek, *Animacja czasu wolnego w hotelu – co to takiego?*
<http://dziennikurystyczny.pl/2009/08/animacja-czasu-wolnego-w-hotelu-%E2%80%93-co-to-takiego>,
słan na 29.12.2012.

⁵ P. Litwicka, *Metodyka i technika pracy animatora czasu wolnego*, Kraków 2011.

⁶ *Ibidem*.

hotels appeared in their offer. Each of the hotels with two animators delegated by the tour operators.

Polish animation appeared also in the offer of among others Itaka, Wezyr Holidays, Sun & Fun and Grecos Holiday.

In the initial stage, animation programs were aiming at the youngest holiday-makers. Parents highly valued the opportunity of leaving their children with professionally trained animators as thanks to this they were able to gain some time for themselves. The animation programs itself also underwent metamorphosis. From purely entertaining ones to those which combine amusement with education. Tour operators have taken into account parents' suggestion that they would like the animations to additionally possess some educational values. Thanks to it, a child who comes back from holidays will be able to describe where she/he was, how does the flag of this country look like and what the most typical animals for that country are.

For several years the Polish tour operators' offer of holiday animations has been concentrating on the youngest tourists. Gradually joined activities for the whole families, which were conducive to establishing relationships between children and parents, were being introduced. It was, however, the case that holidays was the only time for the parents when they are able to give their child more attention, as while working they virtually had no time to devote to their offspring. However, the adult customers who previously avoided foreign animation prepared for them by hotelkeepers (with regard to the communication problem, as activities were in great majority carried out in English or German) at certain point became interested. Language barrier did not disappear, it was still a trouble spot in various situations when particularly strong antagonisms aroused („why Germans can have fun, and we do not?"). This is why, tour operators introduced new animation concepts – which is TUI best Family, Let's Holiday or Happy Events Sport which provide animation for teenagers and adults in the Polish language. Apart from sport animation, e. g. aqua aerobic or water polo the program included also other forms of activity and facilities as well as making the holiday stay more attractive which is the opportunity to borrow Polish books, walks in the area, visits at a local market or in a tavern.

The demand for and development of the family offer resulted in the fact that tour operators constantly modify and diversify their offer for that target group. A great deal of them decided to issue a special profiled family holidays catalog. This is the case of among others Itaka, TUI, Neckermann or Sun& Fun. Web portals have been created with information about the animation hotels and animators who work there (www.figlokluby.pl, www.happyevents.pl). The tourists even before choosing an offer and going for holidays can read about the infrastructure details of a given hospitality facility, what animation program is there and who is leading it; as well as get acquainted with opinions of those who have already made use of a given offer. One of the web portals has a blog where you can meet other holiday-makers who will spend their holidays in the same hotel at the same time as you and the customer is able to get to know them even before setting off a journey. After returning from holidays customers are able to give reference on the topic of a hotel, enclose photos and films.

A company mascot became an obligatory part of an offer. In TUI it is Skanbo elephant, Neckermann has got a lion – LeoNeck and FigloklubyRainbow Tours

a monkey called Figlo. Itaka made use of Walt Disney's cartoon figure – ScoobyDoo. Some of the companies have got their own animation song and even one of the tour operators published a special book instructing in what way a family with children ought to prepare while going for holidays abroad.

Apart from selected hotels with properly prepared infrastructure or animation programs in the Polish language, tour operators compete for the target group also by means of price. Frequently hotel services are free of charge for the first child and for the second in flat-rate amount (it is worth remembering the rest of charges, e.g. flight). Some companies implement also fixed charges for child's participation in a journey which are independent of for example the exchange rate, airport tax and others connected with price calculation.

Present analysis of Polish tour operator's family offer

Among 10 the largest Polish tour operators⁷ up to 6 (Itaka, TUI, Rainbow Tours, Neckermann, Wezyr Holidays⁸, Sun&Fun) for summer 2013 have got a special offer for families with children including Polish animation.

Itaka (Nowa Itaka Sp. z o.o.) opens „Kluby przyjaciół Itaki” [„Itaka's Friends Clubs”] (it is a modification of an animation concept which until now was realised as „Itaka Relax Club”). Those are animation clubs where during the holidays period, from the 15th June to 15th September, children and adults can participate in classes and activities lead by Polish animators employed by tour operators. The organizer has prepared a special catalog “Rodzinne wakacje w klubach przyjaciół Itaki” [“Family holidays in Itaka's Friends Clubs”] in which hotels and trips ideal for family holidays are presented. 35 selected hotels can be found in that offer. The tour operator praises highly the fact that they have got big rooms (also with partial kitchen) and infrastructure for children (paddling pools, playgrounds and mini clubs). Moreover, 5 programs of profiled tour events for the youngest tourists appeared in the offer. Those are tours to Italy, Great Britain, France and Denmark.

Tab. 1

Exemplary program of children animation

Week I	In the morning (10:30-13:00)	In the afternoon (15:00-17:00)
Monday GETTING ACQUAINTED WITH SCOOBY DOO	Integration games and activities in mini club	Integration games in the swimming pool or in hotel
Tuesday SCOOBY DOO BRAVE DETECTIVE	Creating accessories and outfits, stories about detectives	Solving a detective mystery – club race with tasks and riddles
Wednesday SPORTY SCOOBY DOO	Activities and games	Races and sports competitions

⁷ K. Popiolek, *Zyski dla największych, starty dla przeciętnych*, Warszawa 2012, Touroperatorzy 2012.

⁸ W niniejszym opracowaniu nie przedstawiono oferty Wezyr Holidays na lato 2013 roku, bowiem nie została ona jeszcze opublikowana, jednak touroperator potwierdził obecność polskiej animacji w swojej ofercie.

Thursday SCOOBY DOO OUR SMALL TRAVELLER	Creating holiday souvenirs, fun with English	Learning new holiday songs and dances
Friday SCOOBY DOO AMONG THE INDIANS	Creating plumes, Indians role-playing	Indian expedition for loots
Saturday SCOOBY DOO BIG ARTIST	Creating masterpieces – creating play-dough images, drawing, painting, modeling	Games and contests on the beach or in a hotel
Sunday FAIRY TALES DAY - SCOOBY DOO AND FRIENDS	Fairy tales quiz, charades, board games	Reading and watching fairy tales, role-playing activities

Source: Nowa Itaka Sp. z o.o. advertising materials

TUI (TUI Polska Sp. z o.o.), likewise Itaka, in one additional catalog collected offers for families with children which differ from the standard offers. TUI together with Scan Holiday since 2011 offer their customers animations in „Scan Holiday” clubs. Scan Holiday Clubs are a special offer for families travelling with children. Selected hotels have got especially prepared infrastructure for the youngest at their disposal. This infrastructure guarantees carefree entertainment under the watchful eye of professionally trained animators. Division into two age groups is obligatory in those clubs: the younger group (4-7 years old) and the older (8-12 years old). With regard to the international safety standards, children under the age of 4 can stay in the club only under parent's supervision. „Scan Holiday” clubs, just as „Kluby przyjaciół Itaki”, function from the 15th June to 15th September. Animation is provided 6 days a week. All of the activities take place in Polish, in two subject areas – morning and evening. Each mini club functions for several hours a day and detailed opening hours are set by a hotel. The program of activities includes among others: Indians day, pirate day, mini artistic workshops, magic and witchcraft day, the Olympics, world upside down and pajama party.

A novelty from summer 2012 in TUI offer is a family club concept – TUI best Family. It is international animation both for children and adults. All of the international activities take place in German with an active participation of the Polish animators who translate it into Polish. Additionally, in TUI best Family clubs activities for children and adults which are only in Polish also take place. What is prepared for the whole family is among others: sports Olympics and evening artistic programs; fitness for adults, aqua aerobic, jogging and team sports while for the children attractions and thematic days in the mini club as well as mini disco in the evening.

Rainbow Tours (Rainbow Tours S.A.) does not publish any separate offers catalog for families with children. This, however, does not mean that the organizer put no emphasis on profiling the offer for that target group. Rainbow Tours offers its customers two forms of animation activity, „Figlokluby” (clubs for children aged 4-12) and clubs „Let's Holiday” (clubs for teenagers and adults). Both of them function from the 15th June to 15th September in 27 hotels from the tour operators offer. Activities are provided 6 days a week, twice a day (with a lunch break). An interesting offer of that tour operator since winter 2012 offer is ski a „Figloklub” which combines learning skiing with hotel animation. During the whole day children

are under professional supervision of ski instructors and after several hours on a ski slope they are still able to take active part in activities organized in the hotel (such a form of animation is available also in other tour organisers' offer, particularly those who specialize in ski tourism).

Since 2012 Rainbow Tours realises a new club concept - „Let's Holiday”. So-called Tropiciele Atrakcji, who are especially trained animators, organise sport, recreational and integration activities. Apart from standard activities such as aqua aerobic or water polo, they also tell tourists about culture, habits and customs connected with the resort; take guests for walks in the vicinity, organize outings to local restaurants which aim at getting to know local cuisine's tastes.

Neckermann (Neckermann Polska Sp. z o.o.) presents its offer for families with children in a special catalog – „Rodzinne Wakacje”. Similarly to Rainbow Tours, Neckermann offers two forms of animation activity: „Happy Events” clubs (devoted for children aged 4-12) and clubs „Happy Events Sport” (for teenagers and adults). Both clubs are opened from the 15th June to 15th September and activities take place 6 days a week. „Happy Events” Clubs function in 35 hotels and „Happy Events Sport” in 5 hotels from Neckermann's offer. A novelty, as it comes to this tour operator, is introducing a new program of NordicWalking in two hotels on a Greek island Kos.

Sun & Fun (Sun & Fun Holidays Sp. z o.o.), following Itaka, TUI or Neckermann example, has published a separate catalog with an offer profiled for families with children. That tour operator's club concept is „Orange Family Club”, available in 11 hotels from their offer. Clubs function at different dates depending on a given hotel. This is, however, the holiday period which is – more or less – from the beginning of June till the end of September. „Orange Family Club” offers programs for adults and children. Those are animation, education, sports and artistic activities.

One more tour operator who, however, is not among ten largest tour operators but has got a wide animation offer is Grecos Holiday (Grecos Holiday Sp. z o.o.). This year the organiser introduces a new club concept called „Delfini”. „Delfini Kids” animation is a new standard which assumes that Grecos Holiday animator joins an international team in the hotel's kids club and provides care in Polish. „Delfini Active” also assumes a Polish animator in an international animation team who cooperates during recreational and sports activities organized during the day. In turn, „Delfini Club” animation will consist in creating own clubs with a team of Polish animators who will be supposed to keep children and adults amused both during the day and in the evening (an evening animation program).

Summary

Families with children are a vital target group for Polish tour operators which can be noticed on the example of the product offer. Available are special catalogs with offers profiled especially to the needs and requirements of tourists going on holidays with children. Tour operators have noticed that this target group chooses tourist offer with regard to the hotel infrastructure and animation program. While previously it was mainly children who participated in hotel animation nowadays more frequently adults join such activity forms. This is thanks to introducing new animation concepts which assume activities carried out in Polish. For the majority of children foreign language was not any obstacle in animation entertainment while

adult experienced discomfort with regard to the communication barrier. Polish animators joining hotels' animation teams or creating a separate club only for the Polish guests expanded the hotels and tour operators' offer and encouraged customers to decide upon them. Animation's form evaluated and they are not restricted to entertainment or sports activities, yet they are supposed to carry certain values and result in the fact that tourists will come back from holidays not only with suntan but also new knowledge and experiences related to culture, customs and traditions of a resort in which they spent their vacation.

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Family holidays - contemporary trends in polish tour operators' offer

Summary

Polish tourists' expectations with relation to tour operators and their offers are changing nowadays. Just several years ago the most vital for a customer was only the opportunity of going abroad and spending holidays in an exotic place. Everything was new, extraordinary and worth paying attention. However, after a couple of years of travelling, getting acquainted with the world and gaining experience connected with the choice in tourist offer, a Polish consumer became increasingly more aware of his/her own needs and requirements in relation to a tour operator. While going on a journey (5 days or more) Poles most frequently decide to go with a spouse (45%) and a child/children (29%)⁹. In the second case, the choice of tourist offer aims at providing attractions and safety for the whole family. This tendency was noticed by tour operators who began to prepare special family holidays offers.

⁹ J. Łaciak, *Uczestnictwo Polaków w wyjazdach turystycznych w 2010 roku*, Warszawa 2011.