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TOURISM DEVELOPMENT IN ŁÓDŹ IN 2000-2014: DIRECTIONS AND CHARACTER OF CHANGE

Abstract: The primary aim of the article is to present the scope and character of tourism in Łódź, between 2000 and 2014. The author will show both the overall changes in numbers of registered tourists during those 15 years, its distribution within the city in the last year, and the number and specificity of foreign arrivals (non-residents). Based on surveys in 2009-12, the author will discuss the structure of tourism in Łódź, taking into consideration one-day visitors and tourists, tourism consumption and distribution within the city space.

Keywords: tourism, tourist, one-day visitor.

1. INTRODUCTION

The socio-economic transformation, implicating an improvement of the technical and social infrastructure resources of the largest Polish cities, caused an increase in the demand for leisure time management services and, consequently, increased the importance of the tourism services provided in cities. After introducing changes into the local government system and after territorial reform, the perception of the city as a tourism reception area also changed (MAJEWSKA 2011, p. 36), which could be seen in the inclusion of tourism development into the strategic objectives of large urban centres as a chance for economic promotion (LISZEWSKI 2008), even though it is still rarely planned, monitored or controlled by the city authorities (KOTUS, RZESZEWSKI, EWERTOWSKI 2015). J. MAJEWSKA (2011) believes that knowledge of urban tourism development processes is essential for 'first tier' local authorities who sometimes are active initiators and coordinators of local transformations, or managers of areas undergoing transformation. Unfortunately, public statistical presentation of urban tourism is rather generalised and limited. For instance, it does not include details concerning the profile and expectations of those visiting the city. Hence, in order to interpret the phenomenon properly, it is necessary to consider additional factors, such as motivation, experience or the use of space in time (using GIS and new technologies). While there are numerous methods and

techniques of studying tourism – both traditional (e.g. surveys) and those using modern technologies, such as TelSKART© mobile phones (ALEJZIAK 2009), satellite navigation (e.g. SHOVAL, ISAACSON 2009), in the case of Polish cities comprehensive research is undertaken rarely, mainly due to limited financial means¹. Researching the tourism market, and publishing the results for those who are interested, is sometimes seen as one of the main tasks of the local authorities, part of a comprehensive promotional activity (PANASIUK, ed. 2006) and of urban policy. An example of such practice is the continuous monitoring of tourism (e.g. a survey concerning motivation) in large cities like Vienna or Nice. In Poland, the study of urban tourism, initiated by the local government or local organizations, has been conducted in Kraków (since 2003), Toruń (since 2006), Łódź (2009-12) and Bydgoszcz (since 2012).

The primary aim of the article is to present the scope and character of tourism in Łódź over the period of 15 years from 2000 to 2014. The author will present both changes in tourism in 2004-14, as well as its structure in 2009-12.

The source materials for the article are summary tables provided by Łódź Statistical Office, based on current statistical reports for 2000-14, as well as the data collected during a survey on the tourism in Łódź, conducted in 2009 for the Regional Tourism Organiza-

tion of Łódź Province (*województwo*) (ROT WŁ) by a team supervised by S. Liszewski and later in 2010-12 by B. Włodarczyk.

2. GENERAL CHANGES IN TOURIST TRAFFIC IN ŁÓDŹ: 2000-14

According to A. MATCZAK (2011), in 1979-1989, the number of people using tourist accommodation facilities in Łódź was stable and, with the exception of the martial law period, reached 220,000-250,000 annually. The biggest crisis came in 1990 (a plunge to 167,100) and since that time the number of people using such facilities in Łódź has been gradually growing, although not without stagnation periods or even a slight decline. Further analysis will concern the last 15 years, i.e. the period of 2000-14.

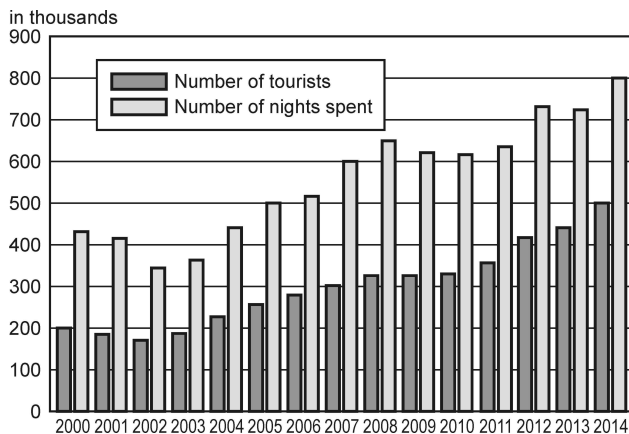


Fig. 1. The number of tourists and the number of nights spent in Łódź: 2000-14
Source: Central Statistical Office

In 2014, the number of tourists registered reached 502,900, having increased by 168,800 since 2010 (334,100) and by 304,900 since 2000 (198,000) – Fig. 1. Compared to other province capitals, Łódź did quite well as a centre of registered tourism reception (Table 1). However, considering the size of the city and its population potential, it was outclassed by Wrocław, Poznań and Gdańsk, especially as regards the number of nights spent by tourists in these cities, and by Szczecin as regards the number of foreign tourists.

A more detailed analysis of registered tourism in 2000-14 has shown a growing trend since 2003. 2001 and 2002 were the years when the indices were lowest –0.96 and 0.91, respectively (if the index for the preceding year = 1, the index for the following year which is below 1 signifies decrease and above 1 an increase). The absolute values reached their minimum

Table 1. Number of tourists and number of overnight stays in province capitals: 2014

City	Number (thousands)		
	tourists (total)	overnight stays	foreign tourists
Warsaw	2,858.2	4,849.1	1,071.7
Kraków	1,996.4	4,247.5	1,019.1
Wrocław	916.7	1,551.1	290.9
Poznań	731.1	1,175.6	182.3
Gdańsk	719.4	1,688.6	265.6
Łódź	502.9	804.6	101.1
Szczecin	388.1	793.7	137.4
Katowice	313.8	569.9	82.1
Toruń*	269.8	407.5	54.8
Białystok	247.2	328.1	101.6
Lublin	211.0	326.4	56.6
Rzeszów	190.2	278.7	50.6
Olsztyn	170.5	302.2	22.3
Bydgoszcz	144.7	274.3	18.6
Kielce	122.3	209.6	11.8
Opole	64.8	113.1	15.7
Zielona Góra	62.1	97.7	11.7

* In order to have the full picture of the phenomenon, the author also took Toruń into account, which is not a province capital but it is one of the 10 cities where registered tourist stays is the greatest.

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

in 2002, with 174,600 tourists. In 2004, the index was the highest, at 1.19, while the following years brought a slow increase with indices of 1.0-1.16. The overall index for 2000-10 was 1.68, and for the whole period of 2000-14 – 1.51 (Table 2).

Slightly greater changes are observed with regard to the number of nights spent by tourists in the city (Fig. 1). In 2000, Łódź accommodation facilities registered 434,500 overnight stays, rising to over

Table 2. Indices of tourism changes and the average length of stay in Łódź: 2000-14

Year	Index		Length of stay
	no of tourists	no of nights	
2000			2.2
2001	0.96	0.97	2.2
2002	0.91	0.83	2.0
2003	1.10	1.05	1.9
2004	1.19	1.21	1.9
2005	1.13	1.13	1.9
2006	1.10	1.04	1.8
2007	1.08	1.17	2.0
2008	1.08	1.08	2.0
2009	1.00	0.96	1.9
2010	1.01	0.99	1.9
2011	1.08	1.03	1.8
2012	1.16	1.15	1.8
2013	1.06	0.99	1.6
2014	1.14	1.11	1.6

Source: author based on the Central Statistical Office data.

804,600 in 2014 (an increase by 370,100, index – 1.85). Fluctuations are visible over the whole 15-year period (Table 2). The lowest index was recorded in 2002 (0.83) and the highest in 2004 (1.21).

A consequence of the phenomena described above is that the average length of stay fluctuated from 2.2 (in 2000) to 1.6 days (in 2013 and 2014). For comparison, according to A. MATCZAK's calculations (2011), in 1979 – it was 2.9 days, with 2.7 and 3.7 days for domestic and foreign visitors, respectively. A characteristic but unfavourable feature is then the shortening of the average length of stay. As pointed out by B. WŁODARCZYK (2012), this situation concerns not only the city but the whole of the Łódź region. It is worth pointing out, however, that in this respect Łódź is not an exception, because a short length of stay is a typical feature of urban tourism (ASHOWRTH & PAGE 2010).

Considering the basic tourism indices – Schneider's index and Charvat's index – in 2000-14 (Table 3), a growing tourist demand can be found. Although these indices do not reach the average values for large Polish cities, in the analysis comprising the period of 1997-2009, J. MAJEWSKA (2011) observed that Łódź was one of the cities with the most dynamic general tourism function indices (where both demand and supply variables were taken into account – cf. J. MAJEWSKA 2011). It is worth noticing that the growth rate of both (Schneider's index soared from under 24 in 2000 to over 71 in 2014; Charvat's index increased from 54.8 in 2000 to 113.7 in 2014) is not only the result of a larger number of tourists and overnights spent in the city, but also of the gradual decrease in the population of Łódź residents.

Table 3. Indices of registered tourism in Łódź: 2000-14

Year	Schneider's index	Charvat's index
2000	24.9	54.8
2001	24.3	53.2
2002	22.2	44.3
2003	24.7	47.0
2004	29.6	57.3
2005	33.6	65.2
2006	37.3	68.3
2007	40.7	80.4
2008	44.1	87.2
2009	44.5	84.2
2010	45.7	84.7
2011	49.7	87.9
2012	58.3	102.0
2013	61.9	101.4
2014	71.1	113.7

Source: author based on Central Statistical Office data.

Comparing the structure of tourism accommodation facilities in 2000 (MATCZAK 2000) and 2014 (Central Statistical Office), it can be clearly seen that hotels played the main role in tourism services (an increase from 77% to 92.8%).

3. TOURISM SEASONALITY

As noticed by B. WŁODARCZYK (2010, 2011, 2012), who analyzed the distribution of registered tourism in individual months of 2009, 2010 and 2011, tourism in Łódź is clearly seasonal. The regular minima, i.e. low seasons, occurred at the turn of year (winter months) and during summer holidays. This concerns both the number of people registered at accommodation facilities and the number of nights they spent in the city. A more detailed analysis from 2015, with tourists divided into domestic and foreign, confirms this tendency, pointing at the same time to a stronger seasonality in Polish tourism, primarily in the autumn, with a maximum in October. In 2014, in that month, a total of over 56,500 visitors stayed in Łódź, including over 46,000 Polish citizens (Central Statistical Office data; Fig. 2). It can be largely explained by the calendar of Łódź events. In October, the number was the largest in the year, including some regular, large-scale festivals, such as the International Festival of Comic Books and Games (3-5th October), Łódź Design Festival (9-19th October)² or *FashionPhilosophy* Fashion Week Poland (22-26th October). According to the information obtained from the Łódź Convention Bureau, October 2014 was also the month when the most popular and regular international³ and national⁴ fairs were held in Łódź. Other relatively large events also took place in autumn: in September – international academic

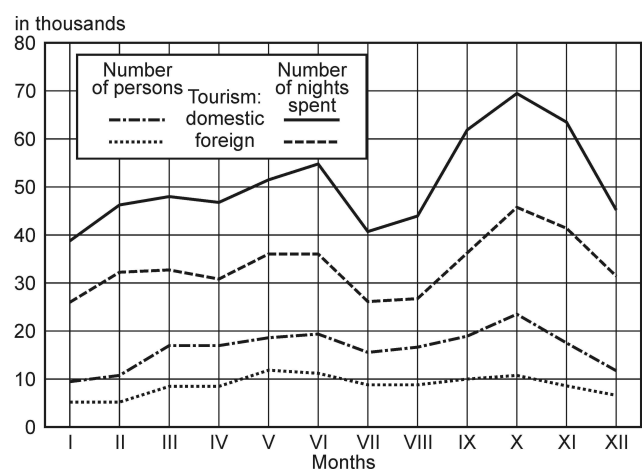


Fig. 2. Monthly distribution of domestic and foreign tourism at Łódź registered accommodation facilities: 2014

Source: author based on Central Statistical Office data

conferences⁵, zoological fairs⁶, concerts and sports events (Men's Volleyball World Championship) in the Atlas Arena, while in November – the finals of the Tansman International Competition of Music, the Boat-show Sailing and Water Sports Fairs, *Cinergia* – the European Cinema Forum, and the 'Man in Danger' Media Festival.

An analysis of calendars showing both cultural⁷ and business-scientific events held in Łódź in 2014 allows us to assume that the seasonality of registered tourism is strongly related to them. The research done by the Łódź Convention Bureau shows that in 2014, in Łódź, 1,230 different events were organized, over a half of them being conferences and congresses, corporation meetings, motivational meetings and trading events. This data shows that those were mainly events related to the economy and politics, technology and medicine. Most had a local range, 526 were national and 179 – international events (<http://www.convention.lodz.pl>). The analysis, however, does not include cultural and sports events during which many guests and participants stayed at Łódź accommodation facilities, especially hotels in the city centre (this demonstrated their participation in the organization of events). Due to the lack of available statistics, however, it is difficult to make any further analyses⁸.

4. FOREIGN TOURISTS IN ŁÓDŹ

As regards the increase in the registered tourists in Łódź, the highest values are for domestic tourists. Their number in 2014 was 401,900, which means that it had grown over two and a half times (by 243,200) compared to 2000. It is worth noticing that at the same time, the accommodation facilities in Łódź registered 61,899 more foreign guests. The share of tourists coming to Łódź from abroad, however, has remained stable in the last five years, oscillating around 20% (Table 4), which is typical of similar European cities (not capitals) (MATCZAK 2011, after: Knowles 2001).

Table 4. Foreign tourists at registered accommodation facilities in Łódź: 2010-14

Year	No of tourists (thousands)	Percentage of foreign tourists	Percentage of nights spent in the city by foreign tourists	Length of stay (number of nights)
2010	57.3	17.1	20.6	2.2
2011	66.9	18.6	23.9	2.3
2012	83.8	20.0	26.2	2.3
2013	78.5	17.7	24.4	2.3
2014	101.1	20.1	24.1	1.9

Source: author based on Central Statistical Office data.

The element which is slightly different in both groups is the length of stay in the city. Domestic tourists still stay in Łódź for a shorter time (2010 – 1.8 days), but as could be seen in the last five years – the average number of nights spent in the city by foreign tourists has also been falling. In 2010, it was 2.2 and in 2014 it fell to 1.9 days.

As regards origins, in 2014, registered tourists in Łódź comprised the whole world (visitors from 49 countries) – Fig. 3. The majority of foreign visitors were inhabitants of European countries making up 76.4% of all foreign tourists, which was about 10% less than in previous years. Unchangeably, the largest group staying at the accommodation facilities of Łódź consists of Germans. However, according to statistics, their share has been gradually decreasing from year to year – in 2000 they made up 19.6%, while in 2014 – only 13.6%. The percentage of visitors from the EU has also decreased: from 74.1% to 60.9% in the last five years. It should be stressed that in 2014, the number of tourists from the United States considerably increased, from 3.5% to 13.2% (from 2000 to 13 300), which substantially changed the mosaic of the main countries generating tourism in Łódź – Table 5.

Table 5. Foreign tourists at registered accommodation facilities in Łódź: 2010-14 (by country of origin)

Country	Percentage in the total number of foreign tourists, annually				
	2010	2011	2012	2013	2014
Germany	19.6	18.0	17.7	15.7	13.6
USA	3.5	3.6	3.3	4.4	13.2
Great Britain	10.0	9.7	8.5	9.5	8.2
Italy	9.1	8.0	8.7	7.4	6.4
France	5.7	6.4	5.4	5.7	5.4
Russia	3.6	4.0	5.9	6.5	4.6
Ukraine	3.0	3.1	3.6	4.0	3.5
Israel	3.4	3.5	3.7	4.6	2.7
EU (total)	74.1	72.4	69.8	66.0	60.9

Source: author based on GUS data.

Americans came second as the tourists most frequently using accommodation facilities in Łódź, following Germans. It is interesting that while the Germans' arrivals and stays are relatively evenly distributed throughout the year, the stays of American citizens in Łódź in 2014 were highly seasonal, culminating in June (they made up over 30% of tourists staying at registered accommodation facilities of Łódź) and plummeting in winter – Fig. 4⁹.

It seems that the situation should be above all related to the functioning of the 32nd Air Base in Łask, and especially to the international military exercises of NATO troops, including American¹⁰, which take place there. In the last five years, the share of British citizens among foreign visitors in Łódź has oscillated between

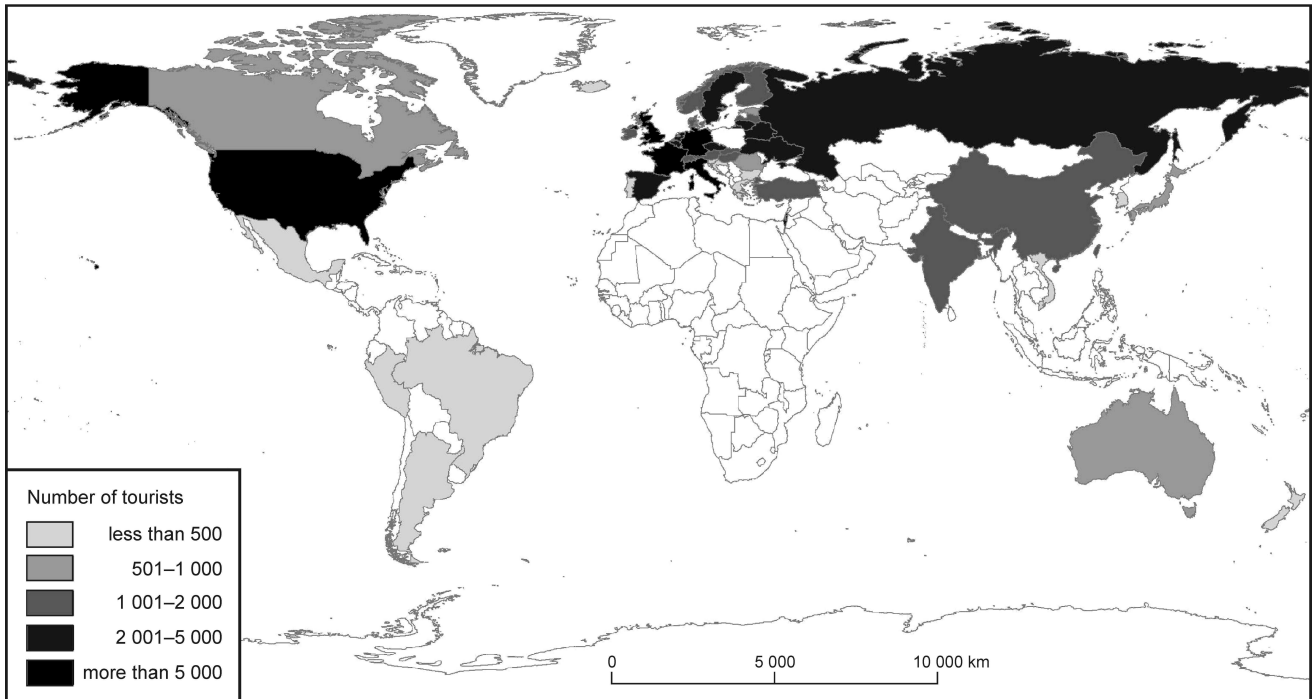


Fig. 3. The origins of registered tourists in Łódź: 2014
Source: author based on Central Statistical Office data

8% and 10%. At the same time, it is worth stressing that according to the information provided by the Łódź City Council Investors Service Office, it is these three countries (Germany, the USA and Great Britain) from which the greatest number of firms cooperating with the Łódź business environment come, especially in the production and business service sectors (BSS), within the framework of the Łódź Special Economic Zone¹¹. Moreover, these are the destination countries of the majority of Polish emigrants (including Łódź inhabitants), which makes them potential directions of Polish emigration tourism.

The percentage of visitors from France staying at the accommodation facilities in Łódź was maintained at a comparable level of about 55%, while the number of Italian guests slightly dropped (from 9.1% in 2010 to 6.4% in 2014). Compared to 2000, in 2014, Łódź was visited by half the number from neighbouring countries – 29.6% (including 4.6% from Russia). In 2000, they had made up 58%. Over the analysed period, the percentage from Asia remained stable at 7-8.5%. It is symptomatic that next to Israel (2.7% – 4.6% – Table 5; 2,700 in 2014), the number from India has risen nearly four times (over 1,100)¹² in the last five years, slightly outnumbering the Chinese (just under 1,100), and the percentage from Japan has increased three times. Tourists arriving from other continents made up 2.7%, jointly.

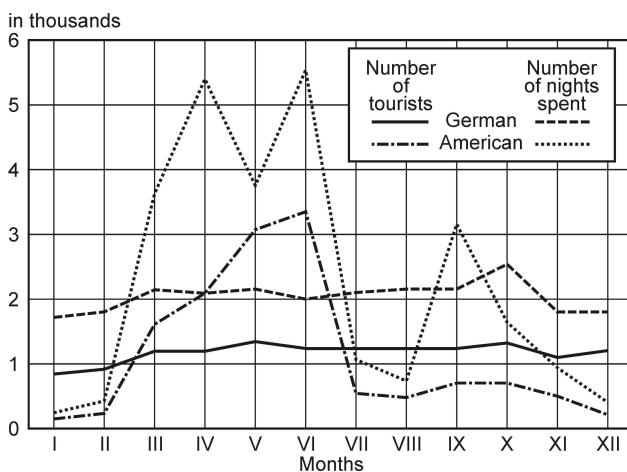


Fig. 4. Monthly distribution of German and American tourists at registered accommodation facilities in Łódź: 2014
Source: author based on Central Statistical Office data

5. TOURISM IN ŁÓDŹ: TOURISTS VS ONE-DAY VISITORS

Public statistics regarding tourism do not cover everything because they are based on the number of nights spent at registered accommodation facilities and the number using them. Thus, it ignores an important type of visitor, which is the one-day visitor. Hence, it is extremely useful to conduct a survey among those visiting Łódź, which makes it possible to differentiate between the two groups and describe their behaviours

and preferences for the purpose of evaluating its scale and character.

The results of the research in 2009-12 show that among all the visitors arriving in Łódź, one-day tourists form a sizeable group, consisting mostly of Poles. They make up at least 30% (2012 - 49.3%, 2011 - 31.7%, 2010 - 41.6%, 2009 - 44%). A large majority spend less than 6 hours in the city. In 2012, over a half of one-day visitors were a little less than 30 years old and satisfied with their financial situation. In each of the analyzed years, over 50% came from Łódź Province, and every fifth from Masovian Province. Foreigners stayed in Łódź longer - only about 5-15% of them were one-day visitors.

The majority of domestic tourists using tourist accommodation facilities in Łódź in 2009-12 (a quarter to a fifth) were inhabitants of Masovian Province, 5-10% came from Wielkopolskie, Małopolskie and Silesian Provinces. The inhabitants of the remaining provinces, especially the eastern ones, made up about one fifth of domestic visitors. Over 90% of domestic and 99% of foreign visitors lived in cities.

The results of tourism monitoring shows that over the studied period, about 60-70% (in 2014 - 67.2%) of domestic tourists stayed at registered accommodation facilities. The remaining 30-40% stayed mainly with their relatives or friends. This is understandable because many respondents declared Polish origins (c. 30%), and a more detailed analysis of the demographic data shows that they were young emigrants from Łódź, arriving mainly from Great Britain.

6. TOURISM CONSUMPTION OF ŁÓDŹ

A contemporary large city is usually a reception area stimulating people to travel for many different purposes: cognition, entertainment, education, business, sports and recreation, etc. The visitors themselves sometimes find it difficult to define the main purpose of their visit, which is well illustrated by the mosaic of motivations to visit as well as ways of spending time. Hence, today's studies of urban tourism are becoming increasingly focused not so much on the motivation as the methods the city offers for consumption. According to Clark, in a post-industrial society the city becomes a place of increased consumption, powered by some local specificity: cafés, art galleries or shopping centres.

In the last year of the research, i.e. in 2012, about one quarter of the domestic and foreign visitors declared that they had come on business trips, understood as participation in conferences, fairs, courses and business negotiations - Fig. 5. Participation in cultural or sports events was declared by almost one

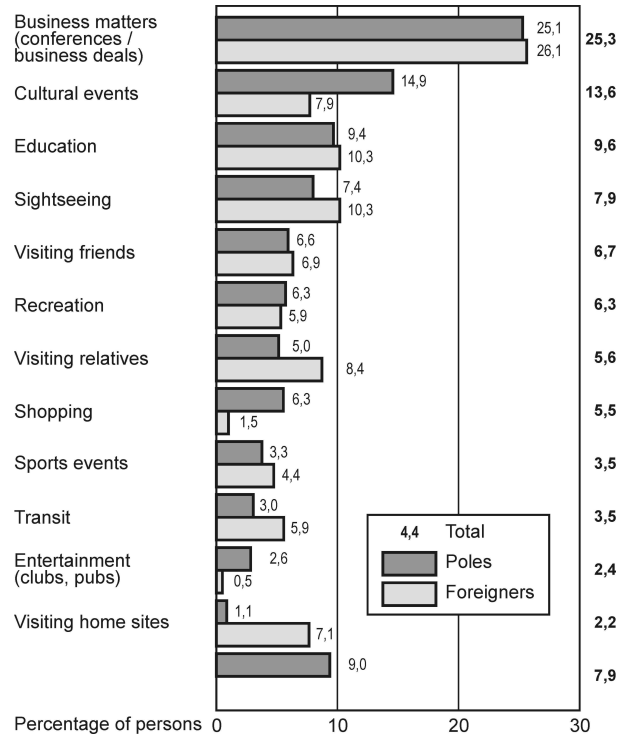


Fig. 5. The main purpose of travel to Łódź: 2012
Source: author based on research for ROT WŁ

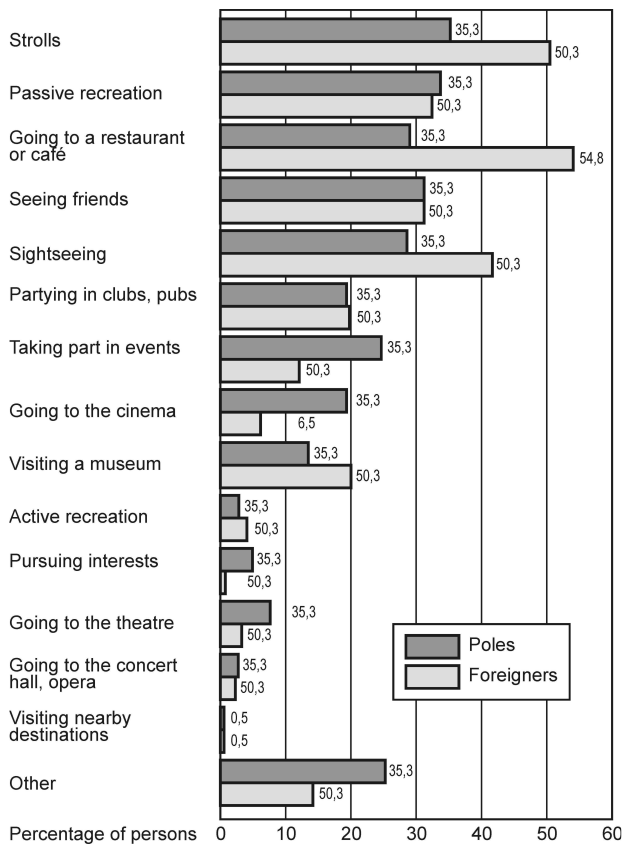


Fig. 6. Ways of spending time by respondents visiting Łódź: 2012
Source: author based on research for ROT WŁ

fifth of Polish residents, especially one-day visitors. Visiting friends and relatives as the main purpose of coming to Łódź was mentioned by over 11% of domestic and 15% of foreign visitors (which is connected with the emigration wave of Łódź inhabitants who have left live abroad, mainly in Great Britain, in recent years).

The ways of spending time during a stay in Łódź shows a domination of rather passive activities (sightseeing, passive recreation, walking – Fig. 6). We may notice differences between the ways of spending time by Poles visiting Łódź, and by non-residents who took advantage of the gastronomic and cultural offer of the city more often. It should be stressed that the differences are not the result of the respondents' financial situation – both groups rated this in a similar way. The significance of meetings with friends (especially in multiple-choice questions), visible in the quoted purposes of travel, has its continuation in ways

of spending time in Łódź. In 2014, over 30% of domestic and foreign visitors met friends in Łódź. Thus, comparing the declared purposes of travel with the actual ways of spending time in the city, we see some discrepancies – using the entertainment or gastronomic offer of Łódź to a larger extent than planned is beneficial for the city.

7. TOURISM WITHIN THE SPACE OF ŁÓDŹ

Tourism within the space of Łódź is distributed very unevenly. The survey results from all the years studied show that the most frequently visited places have always been Piotrkowska St and *Manufaktura* centre – Fig. 7. Foreign visitors visited Łódź's historical sites (Old Town, Księży Młyn, the Jewish Cemetery)

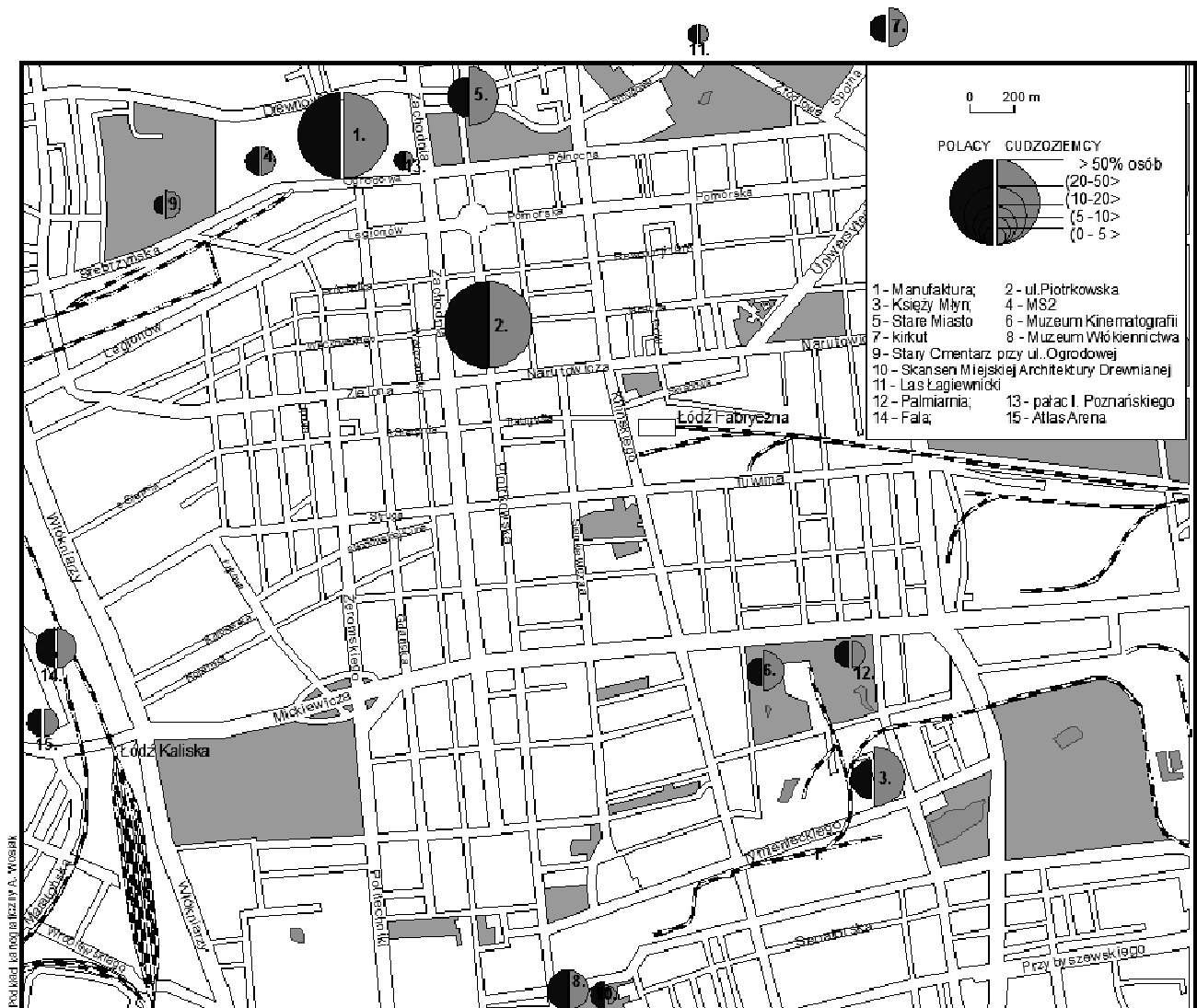


Fig. 7. Tourism within the space of Łódź: 2014
Source: author based on research for ROT WŁ

and museums (especially the Art Museum and the Museum of the Textile Industry) more often than domestic tourists. A *signum temporis* is the relatively large popularity of shopping and entertainment centres, compared to other urban attractions, such as *Manufaktura*, *Port Łódź* or *Galeria Łódzka*. Other facilities were visited less frequently, including the new recreational facilities, like the *Fala* swimming pools complex and Atlas Arena – a performance and sports hall.

8. CONCLUSIONS

Despite the development recorded in 2000-14 (the absolute number of tourists and the number of nights spent by them in Łódź, as well as tourism indices), tourism in Łódź is still not satisfactory. Negative phenomena include the large seasonality (especially among Polish residents) and the shortening of the average length of stay. While the ratio of domestic tourist visits to foreign arrivals is comparable to that in similar cities and relatively stable (80:20), the structure of tourism has undergone certain changes. A particularly interesting change has been numbers and percentage increase in the number of visitors from the USA who in 2014 and the first half of 2015 became the second most numerous group in Łódź to the Germans. They were comparable as regards numbers but of a completely different distribution of arrivals throughout the year.

Research concerning the period of 2009-12 showed continuous changes in the structure of tourism in Łódź, with respect to both one-day tourists and residents *vs* non-residents. It showed the variety of motivations, ways of spending time there, among which a new(?) phenomenon could be observed, symptomatic of a large modern city, i.e. the growing importance of shopping and entertainment centres (to a smaller extent – of new recreation and sports centres), which generate particularly large figures among one-day visitors from the region. The study showed Łódź as a city of meetings – not only business, cultural or sport, but also private with family and friends. However, it can hardly be the basis for establishing tourism trends as it would require systematic monitoring.

Contemporary 'mutagenesis' (JANSEN-VERBEKE 2011) of the cityscape of Łódź will probably implicate many changes in the spatial behaviour of visitors to the city. It is intriguing whether, and to what extent, the centre of Łódź will become a tourism business district. Without advanced research, it will be difficult to find answers to this and other questions.

FOOTNOTES

¹ An example of an interesting innovative tourism study was carried out in Poznań, in 2012-2013, by a team supervised by J. Kotus as a part of a multifaceted project (NCN grant), entitled "Visitors in the city-city structure vs. the visitors: an analysis of the socio-spatial urban structures in the context of the 'external user' theory", where the researchers used techniques of GIS measurement (satellite positioning system, path sequencing, spatial analysis, multidimensional visualizations) to study real social behaviours of people visiting the city. The authors claim that it was probably the first study of this type on this scale in Poland (<http://ebeh.pl/kategoria/o-projekcie>; 18 January 2016; KOTUS, RZESZEWSKI, EWERTOWSKI 2015).

² Attended by about 45 000, according to the organizer's information.

³ For example be Eco, Natura Food, Technical Textile Goods Fairs (for which the organizers predicted about 25.000 participants)

⁴ MOBICON Mobile Technologies Fairs (predicted 11,000 participants)

⁵ XVI International Biodeterioration and Biodegradation Symposium, The International Conference on Education Technologies and Computers ICET

⁶ PET FAIR International Zoological Fairs (predicted 8,000 participants)

⁷ Provided by the Promotion, Tourism and Foreign Cooperation Office at Łódź City Hall.

⁸ It is worth noticing that in 2014, the *Atlas Arena* in Łódź was the venue of the largest number of events in Poland – over 20 large concerts, festivals (e.g. June concerts during Impact Festival) and sports events (e.g. the Men's Volleyball World Championship in September).

⁹ Central Statistical Office data for the first seven months of 2015 repeated the situation from 2014 with a rapid increase, this time in June and July – the number of American citizens staying at accommodation facilities in Łódź in January-May fluctuated between 241 and 508; in June it was 4278 and in July – 6,940.

¹⁰ However, due to the nature of the data, they cannot be published.

¹¹ The '10 years of modern business service sector in Poland' report shows that in 2014, in Łódź, there were 65 BSS centres (10% from Great Britain, 9% from Germany, 7% from the USA), e.g. UPS (USA), GFT (Great Britain), Fujitsu (Japan), Infosys (India).

¹² Łódź Infosys centre is one of the biggest foreign investors in the city and the largest unit of this company outside India.

Translated by Ewa Mossakowska

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