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Innovations in the Polish tourism sector in the eyes of consumers – selected examples

Abstract. The purpose of the article is to analyse selected aspects of innovation in the Polish tourism sector from the perspective of consumers and to highlight those areas where innovative solutions should be implemented. The author uses empirical data to verify the following hypothesis: consumers' perception of innovations concerning tourism products in the Polish market varies considerably and depends on respondents' characteristics. The study was based on information collected from 407 respondents using the computer-assisted web interview method (CAWI), which constituted a country-wide quota sample, representative of the Polish population aged 18 or over, in terms of age, sex, education, the size of the place of residence. The results of the study indicate that consumers are mostly in favour of innovation in the tourism sector, notice emerging developments in this field and are very optimistic about the country's innovation capacity. Differences in opinions about innovative tourist products were depended on the professional status of the respondents. Consumer awareness may be one of the key elements in the development of the sector. The development of innovative tourism services in Poland should be a continuous process, especially in less developed areas, which depend heavily on tourism. The development in this area is facilitated by favourable attitudes of consumers towards innovation in the tourism sector, especially in niche markets, and specialised local resources could help to intensify innovation activities.

Keywords: innovations, tourism, consumers, Poland

JEL Codes: O12, D01

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1. Introduction

Some believe that in the long-term tourism will be the most robust sector of the world economy, encompassing not only environmental protection (which currently is the focus of considerable attention) but also the promotion of the tourist potential (cultural, historical, ethnographic, architectural, etc.) of countries that take a positive approach towards the benefits of tourist traffic [Şuşu, Bârsan 2009: 74].

Given the ongoing globalisation process, increasing competition and technological advances, which have been taking place at an unprecedented pace in recent years, innovation is an imperative [Tajeddini, Trueman 2008]. Innovation activities are currently a subject of intensive research [Yuan, Tseng, Ho 2019; Bigné, Decrop 2019; Hall, Williams 2019].

Research on innovation in the tourism sector intensified in the early 21st century, when the tourism sector started to recognise the significant role of innovation, encompassing both the technological aspects of business operations and the elements of a marketing approach and product strategies.

The aim of this article is to analyse selected aspects of innovation in the Polish tourism sector from the perspective of consumers and to highlight those areas where innovative solutions should be implemented. The main research objective of the study was to investigate how present-day consumers perceive innovations and to identify dilemmas that may stimulate innovative solutions in the tourism sector.

Empirical data collected in the survey were used to verify the following hypothesis: consumers' perception of innovations relating to the Polish tourism product varies significantly depending on respondents' characteristics.

The article consists of a review of the literature on innovation in the tourism sector, the methodological description of the study, the analysis of the results and conclusions from the interpretation of the empirical material.

Tourism market developments resulting from a wide variety of factors – health-related, economic, sociocultural, political – should be subject to continuous analysis. Innovation in the tourism sector is becoming almost a necessity, allowing companies and regions to maintain a foothold in the market. This is all the more important in the current global situation, where health threats are present in almost all the countries that send and receive tourists.

2. Innovation in tourism – overview

Joseph Alois Schumpeter, who adopted an extensive approach to the issue of innovation, defined it as “developing new product functionalities [...] or opening new markets for a product” [Nagy 2010: 16]. Such an understanding of inno-

vation activities in the tourism sector reflects the most common way in which they are manifested, which covers changes in the structure of tourism products (broadly understood – places or events), intentional adjustment of the internal organisational structure of businesses and changes in the approach to marketing rules associated with sales procedures [Orengo Serra, Picón Garcia 2013: 2].

The main classification criteria for innovation are consistent with the approach proposed by Schumpeter and cover elements relating to:

1. Products, namely the design and marketing of new, improved offers/products or services attracting the attention of consumers. Their effectiveness is determined by whether they are noticed by manufacturers, suppliers and consumers.

2. Processes, which shape changes in the internal structure of businesses and help improve their operational effectiveness, including the use of non-traditional technologies and replacement of ineffective production lines with new lines that streamline manufacturing processes. In the tourism sector, process innovations are most often encountered in the form of e-tourism and increasing digitisation. Their practical applications are used by hotel chains, transport booking systems, local government authorities that promote regional tourist attractions and universities that provide education to staff managing tourist traffic.

However, innovation does not always have an impact on the achievement of goals set by potential beneficiaries. Sometimes the praxeological result of the action taken is not effective, beneficial or cost-efficient and needs to be adjusted accordingly.

Anne Marie Hjalager [2002] identified three categories of innovation: management, logistics and institutional. The first category covers significant changes to management practices of businesses, including the development of specific occupational profiles of employees, and the establishment of new organisational structures and hierarchical systems, which often manage new projects, products and outlets. Logistics innovation pertains to changes in the distribution chain, involving the strategies, channels and development of online marketing, which accelerates the process of reaching target markets with a product. The last category identified by Hjalager [2002] is institutional innovation, which affects an organisation in an exogenous manner. The legal standards for business operation in the tourism economy may strongly redirect the approach of entrepreneurs to the market and enhance, more or less successfully, the efficiency of their activities.

Consumer preferences also need to be taken into account in innovation processes as consumers play a significant role in transferring knowledge to tourism companies [Eggink 2013: 5]. Information provided by tourists may be a source of new ideas and solutions for the development of the tourism sector.

Innovation in tourism is closely related to service activities, which were first included in research analyses by Richard Barras [1986]. He proposed a theoretical model of process innovation in the service sector based on the theory of

a reverse product cycle [Barras 1986: 161-162]. Slightly different approaches to service innovations were proposed by, among others, Gadrey, Gallouj, Weinstein [1995], Gallouj, Weinstein [1997], Sundbo [1997], Tether, Hipp, Miles [2001], Miozzo, Soete [2001], Djellal, Gallouj [2001], Gallouj, Savona [2009] and López-Fernández, Serrano, Gómez López [2011].

Rohit Verma et al. [2008] also reached important conclusions for the service sector in the context of innovation, formulating specific guiding principles. These authors emphasised three issues: customer orientation, concentration of processes and their continuous improvement, which amount to keeping up with trends in the sector, carrying out ongoing analyses and monitoring customer experience.

Analyses and studies carried out after 2005 clearly indicate that the most beneficial innovations in the tourism sector relate to technological concepts [Sundbo, Orfila-Sintes, Sørensen 2007; Orfila-Sintes, Mattsson 2009; Aldebert, Dang, Longhi 2011; Meneses, Teixeira 2011]. This confirms the results of a study on service sector companies conducted in 2003, which showed that over 40% of service companies in Europe had implemented such innovations in their commercial practice [Evangelista, Savona 2003: 456].

In the early 2000s, Henry Chesbrough [2003] formulated the concept of 'open innovations', which have become a source of competitive advantage [Łobejko 2010: 14]. The developments in computer technology and their impact on social and economic behaviour made it possible to incorporate exogenous intellectual resources into the innovation process. This concept is based on the assumption that some parts of the innovation process (e.g. at the level of product development or implementation) may be outsourced; however, a company may also draw and then develop ideas from its environment [Dziedzic et al. 2016]. The concept of *User-Driven Innovation* (UDI) implies an analysis of consumer behaviour, which should be taken into account when developing innovation strategies for businesses [Roehrich 2004]. It is consumers who have a growing influence on commercial offers and play a role in creating products and services they purchase.

The UDI concept briefly described above fits well with the premise of this article, which focuses on consumers' subjective assessment of selected aspects of the innovative capacity of the Polish tourism sector. Two approaches identifying consumers' position in the innovation process can be distinguished under this concept [Rosted 2005]:

- user observations, i.e. identifying the needs of consumers and using their feedback to improve existing products/services on the market,
- user initiative, i.e. developing new ideas that come from consumers.

The importance of how a tourism product is perceived by consumers should also be highlighted. Consumers' perception of the image of a destination, prior

to and after the visit, may affect their level of satisfaction and have an impact on whether they will revisit it [Önder, Marchiori 2017].

The literature on innovation in the tourism sector is quite extensive. This subject is comprehensively reviewed by e.g. Gomezelj [2019], Durán-Sánchez et al. [2019], Marasco et al. [2018] as well as Teixeira and Ferreira [2018]. References included in these articles are evidence of the increasing number publications and citations on this subject in recent years.

3. Data and methods

The article focuses on innovation in the Polish tourism market. The following analyses are part of a study¹ carried out between 2015 and 2018².

The information for the study was collected from 407 respondents using the CAWI method. The respondents were selected as a country-wide quota sample representative of the Polish population aged 18 and over, with age, sex, education and the size of the place of residence as independent variables (Table 1) and professional status (Fig. 1). As access to tourism services is currently universal, it was assumed that each adult Polish citizen had been a tourist at some point in their lives (regardless of travel purpose). Thus, the respondents were assumed to represent the group of interest that can provide relevant information about the subject of empirical analyses related to the issues addressed in the paper.

One limitation of the method used in the study was the geographically diversified level of household Internet access (the so-called Internet penetration rate) and the resulting coverage error. However, according to Statistics Poland, Internet access and market saturation with devices enabling online communication are steadily increasing. Therefore, the limitation is becoming less relevant. Thanks to e-mail, the researcher could easily get in touch and interact with the respondents. However, it must be underlined that in the case of online surveys, one can never be entirely sure who actually completes the questionnaire. In addition

¹ The study entitled “The role of tourism in the contemporary consumption model. Controversies in the Polish tourism sector” used a wide range of research methods and techniques (desk research, mystery shopping, individual in-depth interviews, CAWI, expert panel) that enabled an in-depth analysis of the phenomenon in question, including the analysis of real demand and the identification of factors affecting the consumption of controversial tourism services. Owing to the limited scope, it is not possible to present all the results in one article. It should also be mentioned that the issue of innovation in the tourism market was not the main focus of that research project.

² A specialised commercial market analysis company was commissioned to conduct the entire process, including sample selection, (the company’s details can be obtained from the author upon request). Therefore, it was assumed that the sample was representative and no pilot studies were carried out.

Table 1. Characteristics of the respondents in the sample

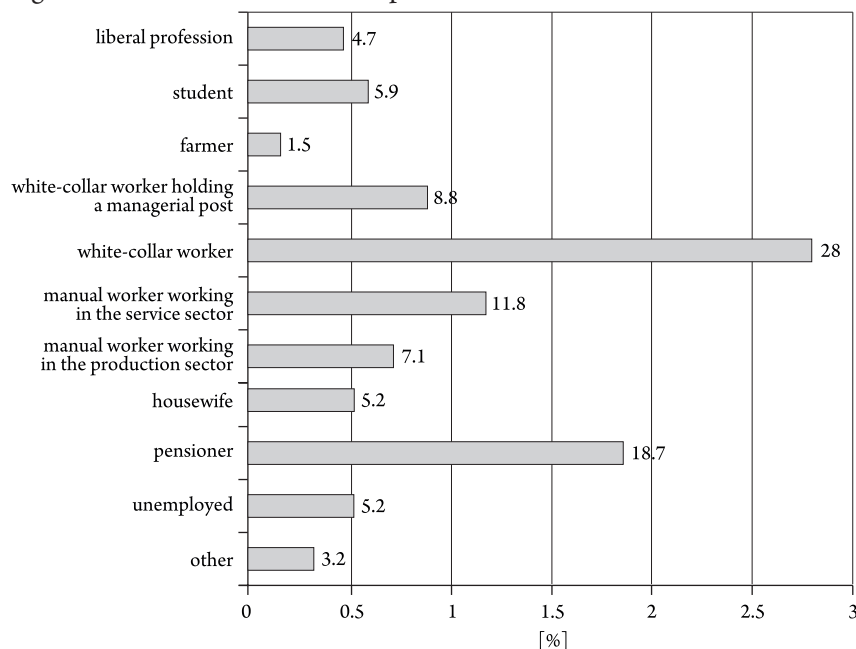
Categories	Number	Percentage
Place of residence		
Metropolitan city (over 500 thousand inhabitants)	52	12.8
Large city (between 100 and 500 thousand inhabitants)	74	18.2
Medium-sized city (between 20 and 99 thousand inhabitants)	80	19.7
Small city (up to 20 thousand inhabitants)	52	12.8
Rural area	149	36.5
Total	407	100.0
Education		
Primary/lower-secondary education	9	2.2
Basic vocational education	36	8.9
Secondary education	131	32.2
Post-secondary education	64	15.7
Bachelor's degree	34	8.4
Master's degree	133	32.6
Total	407	100.0
Sex		
Female	206	50.6
Male	201	49.4
Total	407	100.0
Age (years)		
18-24	53	13.0
25-34	81	19.9
35-44	65	15.9
45-54	79	19.4
55 and over	129	31.8
Total	407	100.0

Source: own study.

to sociodemographic questions, the questionnaire included four main questions that the study participants were asked to answer³.

³ The questions were as follows: 1. What is your opinion about innovative tourism products?; 2. What innovations in Polish tourism products have you noticed in the 5 past years?; 3. Do you think that Poland has a potential for developing innovative tourism products?; 4. In your opinion, what factors determine the development of innovative tourism products?

Fig. 1. Professional status of the respondents



Source: own study.

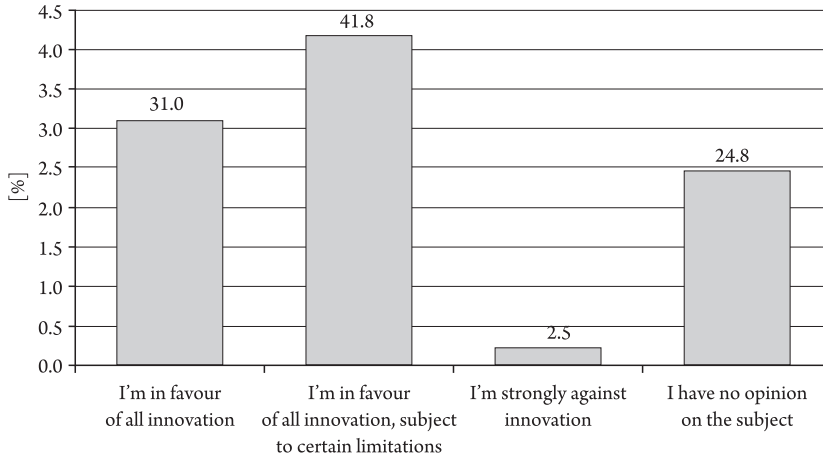
4. Results

4.1. Innovative tourism offers – respondents' opinions

Over two-fifths of the respondents stated that they were in favour of innovation in the tourism offer, subject to certain limitations. Approximately three out of ten respondents were in favour of all innovation in the tourism sector and 2.5% of the respondents stated that they were strongly against innovation. Almost a quarter of the respondents were unable to give a clear answer on the subject (Fig. 2).

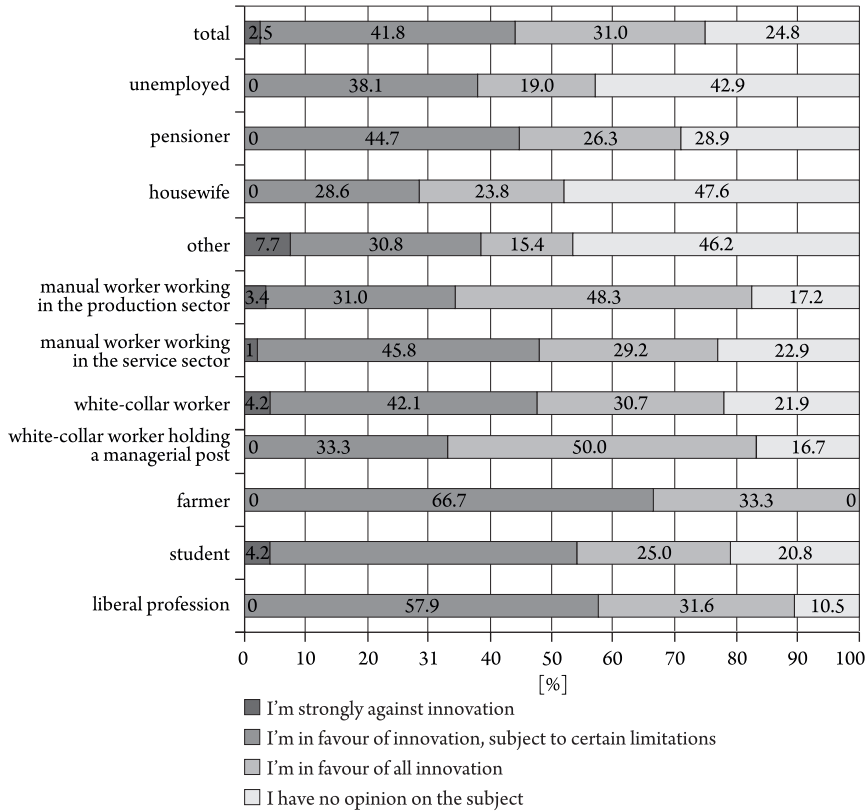
None of those who classified themselves as unemployed, pensioners, housewives, white-collar workers holding a managerial post, farmers and persons engaged in a liberal profession declared that they were strongly against innovation in the tourism sector. In turn, those who described their professional status as 'other' were the largest group of respondents who indicated that they were strongly against all innovation in tourism offers (7.7%). Farmers (66.7%) and individuals practising a liberal profession (57.9%) were the largest groups of respondents in favour of innovation, subject to certain limitations. The largest groups of respondents in favour of all innovation were found among those hold-

Fig. 2. Respondents' attitudes to innovation in the tourism sector



Source: own study.

Fig. 3. Respondents' opinions on innovative tourism offers



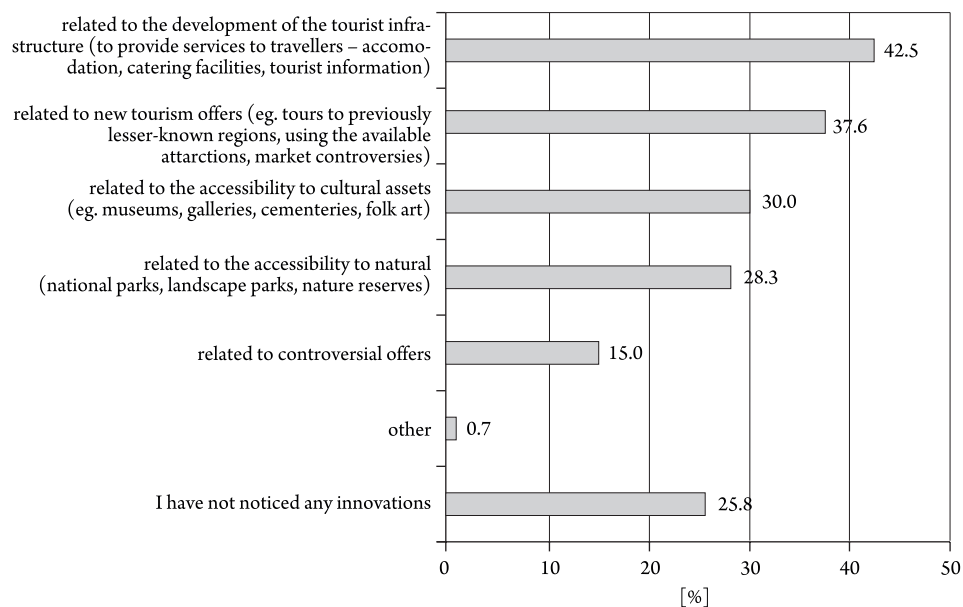
Source: own study.

ing managerial posts (50.0%) and manual workers working in the production sector (48.3%). The largest groups of respondents who did not express a clear opinion on the subject were housewives (47.6%), those in the 'other' category (46.2%) and the unemployed (42.9%) (Fig. 3).

4.2. Innovations relating to the Polish tourism product

The respondents were asked to list innovations relating to the Polish tourism product that they had noticed over the past five years. The largest proportion of the respondents (42.5%) had noticed changes in the development of the tourist infrastructure, i.e. accommodation, catering facilities, travel agents and tourist information centres. A slightly smaller proportion had noticed changes regarding new tourism offers, e.g. tours to previously lesser-known regions. 30% of respondents stated that over the past five years they had noticed innovations with respect to the accessibility to cultural assets and over a quarter indicated changes in the accessibility to natural assets. 15% of the respondents had noticed innovations relating to controversial offers (e.g. sex tourism, recreational drug tourism, slum or ghetto tourism, disaster tourism). Respondents who selected 'other', listed the following: 'trips to conflict-stricken regions (racial, cultural, armed)' ($N = 1$), 'promotion of a regional, local product' ($N = 1$) and 'online offers' ($N = 1$) (Fig. 4).

Fig. 4. Innovations relating to Polish tourism products noticed over the past five years



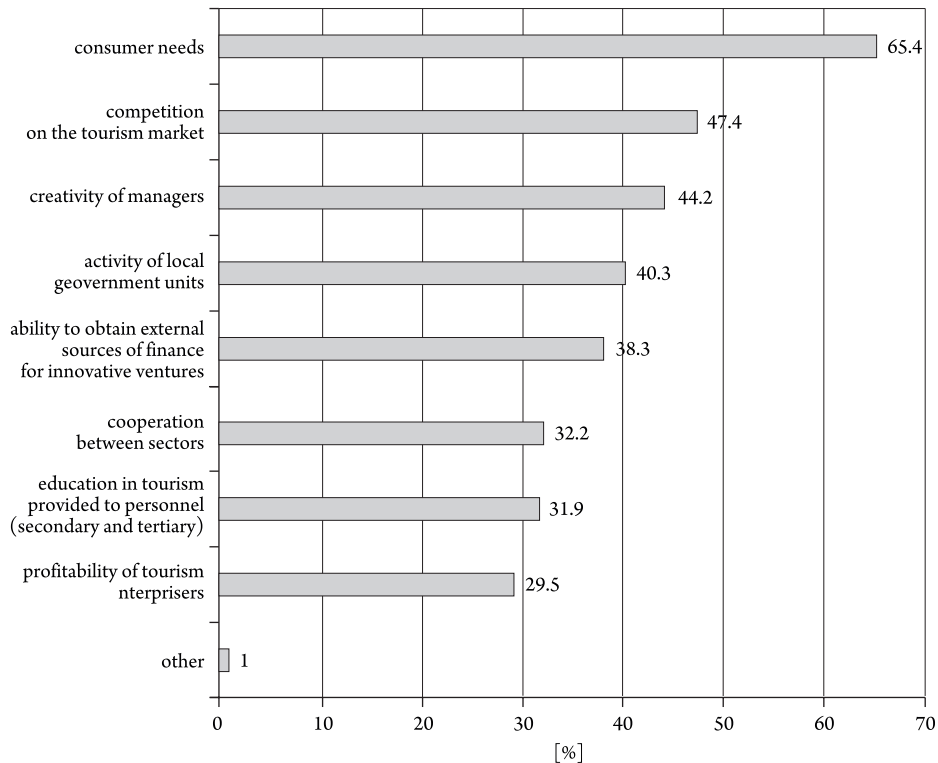
Source: own study.

A little over 25% of the respondents had not noticed any innovations relating to the Polish tourism product over the past five years.

Four-fifths of the respondents stated that Poland has potential for the development of innovative tourism offers, whereas every twentieth respondent was of the opposite view. 14% of the respondents were unable to give a clear answer to this question.

As regards factors affecting the development of innovative tourism offers, almost two-thirds of the respondents listed consumer needs. The second most frequently given answer was 'competition on the tourism market' (47.4%), followed by 'creativity of managers' (44.2%). Two-fifths of the respondents believed that innovation in the tourism sector depends on the activity of local government units. The least frequently given answer was 'profitability of tourism enterprises' (29.5%). Respondents who selected 'other' listed the following: 'lack of consent for the admission of Muslims' ($N = 1$), 'red tape' ($N = 1$) and 'I have no opinion on the subject' ($N = 2$) (Fig. 5).

Fig. 5. Crucial factors for the development of innovative tourism offers



Source: own study.

As can be seen, according to the respondents, innovation in the tourism sector can be facilitated by identifying consumers' needs and using this information to improve competitiveness of enterprises, such as e.g. segmentation processes, attempts to successfully access target markets and position offerings that are distinctive and attractive to potential customers. Interestingly, according to respondents, this does not always have to be accompanied by greater profitability of tourism enterprises. Nonetheless, economic activity is mainly driven by customer needs and profitability.

5. Discussion and conclusions

The study results described above provide an insight into issues related to innovation in the tourism sector. Given the volatility of factors which affect demand and supply, it is difficult to determine directions for future research of this area.

Currently, technology is the key driver of innovation in the tourism sector [Wan 2019: 1]. In this context, Hjalager [2015] also emphasises tourism experience of consumers and supply-side aspects – services and technological systems – which allow enterprises to achieve implementation targets for a given product (communication, booking systems). Thus, a major effect of innovation is the enrichment of the experience of visitors, who have a significant impact on changes in tourism offerings. Their curiosity, needs and requirements motivate enterprises to increase productivity and create novel tourism products. The results of the study confirm this thesis. Consumers' perspective is particularly relevant and should be taken into account in production processes.

The modern technology accompanying production and consumption has the potential of enhancing user experience and improving the productivity of the tourism sector [Gretzel et al. 2015]. These changes make it more feasible to develop procedures for co-creating experiences [Pralhad, Ramaswamy 2004] and designing them [Sanders, Stappers 2008; Desmet, Hassenzahl 2012] and to jointly create services that stimulate them [Stickdorn, Schwarzenberger 2016]. Creative approaches to design thinking [Fesenmaier, Xiang 2017], commonly used in the economy, also play an important role in this regard.

According to the Oslo Manual [2005], which is a benchmark for analysing the quality of innovation processes, only those changes that have a positive and measurable impact on the performance of an enterprise (e.g. increase in sales) can be considered innovations. The Manual also lists factors which affect innovation processes, external, i.e. coming from the environment and internal, resulting from the structure of an organisation. The latter factors are referred to as an innovation dynamo. The general factors listed in the Manual include conditions

and institutions, the research base as well as social and cultural aspects [Dziedzic et al. 2016].

The multiplicity of perspectives listed above makes it difficult to collect and analyse empirical data. This study described above was an attempt to analyse consumer opinions, including those on innovative tourism offers, changes in Polish tourism products, the sector's development capacity and the key factors which affect the development of innovative tourism offers. The hypothesis formulated in the introduction was partly confirmed. As regards the demographic characteristics of respondents. Respondents' occupational status, which is largely disregarded in other analyses in favour of such variables as age, sex, education or the place of residence, was found to play a crucial role and provides a premise for further research into occupational activity of consumers. It is clearly related to a person's level of education, which should correspond with their occupation. However, this was not confirmed unequivocally in the study.

The following conclusions can be drawn from the study:

1. Service innovations represent the main category of market adaptation activities, at both micro and macro levels, and may involve e.g. tourism service incubators and demonstration projects.

2. The development in the tourism sector is fostered by a favourable attitude of consumers towards innovation, especially in niche markets (tourism for senior citizens, cultural tourism, ecotourism, etc.), and specialised local resources could help to intensify innovation activities (e.g. as part of asset management and accessibility).

3. Innovation in the Polish tourism sector should be geared towards industry clustering, which makes it possible to diversify regional and trans-regional products, including those types of tourism that are Poland's trademark feature.

4. Increasing awareness of the transformative potential of innovation in the service sector (among entrepreneurs, decision-makers and consumers) is one of the key elements in the development of the tourism sector.

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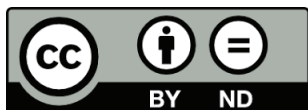
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Innowacje w turystyce w percepcji konsumentów – wybrane zagadnienia. Przykład Polski

Streszczenie. Niniejszy artykuł jest próbą analizy wybranych aspektów problematyki innowacyjności w sektorze turystyki w Polsce, ujętej z perspektywy konsumentów, oraz wskazania tych obszarów, do których rozwiązania innowacyjne powinny zmierzać. Hipoteza, którą postawiono w kontekście dokonywanych analiz empirycznych brzmi: Istnieje istotne zróżnicowanie sposobów postrzegania przez konsumentów innowacji w produkcie turystycznym Polski, szczególnie w kontekście zmiennych niezależnych charakteryzujących respondentów. W badaniu metodą CAWI „Computer Assisted Web Interview” respondenci wypełniali kwestionariusz wywiadu drogą internetową. Wzięło w nim udział 407 osób. Pomiar prowadzono na losowo-kwotowej ogólnopolskiej próbie według reprezentacji w populacji Polaków w wieku od 18 lat wżwyż dla płci, wieku, wykształcenia oraz wielkości miejscowości zamieszkania. Wyniki badań wskazują, że respondenci są w większości zwolennikami innowacji w sektorze turystycznym, dostrzegają pojawiające się w tej sferze zmiany i bardzo optymistycznie oceniają innowacyjny potencjał Polski. Ich świadomość stanowić może jeden z najważniejszych elementów rozwojowych dla branży. **WNIOSKI:** rozwój innowacyjnych usług turystycznych w Polsce powinien postępować w sposób ciągły, szczególnie na obszarach słabiej rozwiniętych i silnie zależnych od sektora turystyki. Przychylne podejście konsumentów do innowacji w turystyce sprzyja rozwojowi tego sektora, zwłaszcza na rynkach niszowych, a wzmocnienie działań innowacyjnych może być wsparte specjalistycznymi zasobami lokalnymi.

Słowa kluczowe: innowacje, turystyka, konsumenci, Polska



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