

ZYGMUNT KRUCZEK^{*}, LESZEK MAZANEK^{**}, ANNA CZULIŃSKA-BUKOWSKA^{***}

The Evaluation of the Demand for Services Provided by Tourist Guides and Tour Leaders

Abstract. This article presents the results of empirical research on the labour market of city travel guides, regional guides and mountain guides as well as tour leaders. The aim of this article is to evaluate the demand for the services of travel guides and tour leaders. The study included tourism entrepreneurs and the method of a diagnostic survey with the use of computer-assisted telephone interviewing (CATI) was applied. The obtained results confirmed the thesis that the labour market of travel guides and tour leaders is not stable and this is due to the seasonality, level of earnings and changing model of travel organization. The study also showed that in the five-year period from the deregulation of the professions, the market relations between travel guides and tour leaders on the one hand and tourism entrepreneurs on the other did not undergo fundamental changes. The results of the study may be useful for tour operators, organisations associating travel guides and tour leaders as well as for tourism administration at the central and regional level.

Keywords: travel guides, tour leaders, services, demand

1. Introduction

Publications on tourist services and the creating offers and selling tourist services very often emphasise the important role of travel guides and tour leaders in shaping the quality of tourist services [Kozłowska 2006; Kruczek (ed.) 2011]. In the

* University of Physical Education in Krakow (Poland), Department Tourism and Recreation, e-mail: zygmont.kruczek@awf.krakow.pl, orcid.org/0000-0003-3015-2139.

** University of Physical Education in Krakow (Poland), Department Tourism and Recreation, e-mail: leszek.mazanek@awf.krakow.pl, orcid.org/0000-0003-2231-4089.

*** University of Physical Education in Krakow (Poland), Department Tourism and Recreation, e-mail: kontakt@anima-tour.com, orcid.org/0000-0003-1840-3070.

era of globalisation, tourists come from different parts of the world and different cultures and local tour leaders and travel guides are often the only people who provide them with the knowledge about the place visited. A travel guide or tour leader often acts as a translator, mediator, country representative, liaison between different cultures, social catalyst [Rabotić 2011; Mikos v. Rohrscheidt 2014]. It is assumed that the quality of the work of a travel guide and a tour leader is a key factor contributing to tourists' satisfaction, it affects the reputation of the travel agency and has an impact on the image of the country and region [Gryszel 2007; Rudmi Chehanika Sandaruwani, Athula C. Gnanapala 2016; Pereira 2015].

Given their type of activity which involves direct contact with tourists, tour leaders and travel guides form a homogeneous tourist sub-sector. What both these professional groups have in common is the need to have similar competences, and the diversity results from the specificity of the area where a travel guide or tour leader works [*Badanie rynku pracy...* 2018].

We assume that the demand for the services of travel guides and tour leaders is reported by tour operators or other entities such as schools, church institutions, work establishments, associations and foundations that directly contact a travel guide or tour leader directly, without the intermediation of a tour operator.

2. Aim

The research conducted in 2018 by the team of employees of the University of Physical Education in Krakow was aimed at assessing the labour market of tour guides and tour leaders [*Badanie rynku pracy...* 2018]. Surveys were also conducted among individuals using the services rendered by travel guides and tour leaders in order to assess the quality of these services and the qualifications to practice the profession of a travel guide and tour leader. The study included travel guides and tour leaders, tourists and tourism entrepreneurs that report demand for their work. The article presents the results of a part of the research which concerns the demand for the services provided by travel guides and tour leaders.

3. Literature review

In the global economy tourism creates an extensive labour market with 319 million jobs, i.e. about 10% of global employment [WTTC 2018; Aynalem, Birhanu, Tesefay 2016]. The tourism labour market can be viewed from three perspectives – employees, employers and researchers [Ladkin 2011: 1135]. However,

it should be added that research on the tourism labour market is relatively rare [Kruczek 2000; Gryszel 2007]. There are few publications concerning the segment of employees directly providing services to tourists, such as travel guides and tour leaders [Xiao, Smith 2006; Chang 2014; Ap, Wong 2001]. The multiplicity of roles they play in providing services to tourists [Cohen 1985; Weiler, Davis 1993; Salazar 2005; Rabotić 2010], in particular the importance of their work in achieving tourist satisfaction [Geva, Goldman 1991] are the most frequently mentioned.

In Poland, the first sociological research among travel guides and tour leaders was conducted by Krzysztof Podemski [2005], who evaluated, among others, the cooperation with tour operators. Tour operators and schools followed by work establishments and churches are the main partners of tour leaders and travel guides. In principle, the respondents cooperated with up to three tour operators. On average, such cooperation got a rating of B minus. Signing a contract of mandate or a contract for specific work or informal oral arrangements are the most common forms of cooperation between travel guides and tour leaders and their clients. The income from work in these professions earned by those working in the last 12 months was generally less than 10% of their total annual income. Both travel guides and tour leaders earned the largest part of their annual income in May, June, July and August and the smallest part in December and January.

The factors shaping the labour market of travel guides and tour leaders were the subject of several analyses carried out in the last decade [Gryszel, Kruczek 2007; Gryszel 2007; Kruczek 2006, 2008].

Another extensive study of the labour market in the sector of travel guides and tour leaders was related to the deregulation of the professions introduced in 2014, which included city guides, regional guides and tour leaders. It is difficult to conclusively determine how the deregulation of the professions of travel guides and tour leaders affected the labour market. In discussions, especially in social media, both positive and negative opinions are expressed about competition from new tour leaders (without licences), the amount of work or rates for services. A significant deterioration in the professional situation of travel guides and tour leaders, as a result of the deregulation introduced, was indicated in a study conducted at the initiative of the Ministry of Sport and Tourism [Jańczak 2015].

The community of travel guides and tour leaders, according to the study referred to above, not only pointed to a deterioration of their economic situation (2/3 of the survey participants), but also highlighted the negative consequences of the change that affected service recipients. The deterioration in the general situation of clients was reported by 75% of the respondents, and an even higher percentage (about 82%) stated that the quality of services in the community decreased.

In the fifth year after the change in the legal framework, an attempt was made to diagnose the changes that took place in that period on the labour market, including with respect to travel guides and tour leaders and tourism entrepreneurs.

4. Method

The research uses the diagnostic survey method, i.e. a method of quantitative collection of data concerning a particular social phenomenon, which allows to determine its scope, extent, level and intensity. In the part of the study concerning the demand for the services of travel guides and tour leaders, the CATI method was used, i.e. interviews with respondents conducted over the phone, using interview questionnaires. The study included 500 travel agencies from the list of 3,541 entities entered in the registers of tour operators and tourist intermediaries kept by marshals of provinces and recorded in the Central Register of Tour Operators and Entrepreneurs Facilitating the Acquisition of Related Tourist Services kept in electronic form by the Minister of Sport and Tourism¹. Quantitative distribution of the surveyed travel agencies in particular provinces is presented in Chart 1.



Chart 1. Number of respondents – travel agencies broken down by provinces

Source: own elaboration.

All respondents reported that, in their business, they use the services of at least one of the following professional groups: tour leaders, city guides, regional

¹ https://turystyka.gov.pl/ceoptip_p_84.html [accessed: 30.04.2018].

guides, mountain guides. However, the respondents most frequently reported that they cooperate with both tour leaders and travel guides, and depending on the area or place, with regional guides, city guides or mountain guides. 16% of travel agencies declared that they cooperate only with tour leaders and do not provide services that require the services of a tour guide.

5. Results

5.1. Demand for the work of travel guides and tour leaders

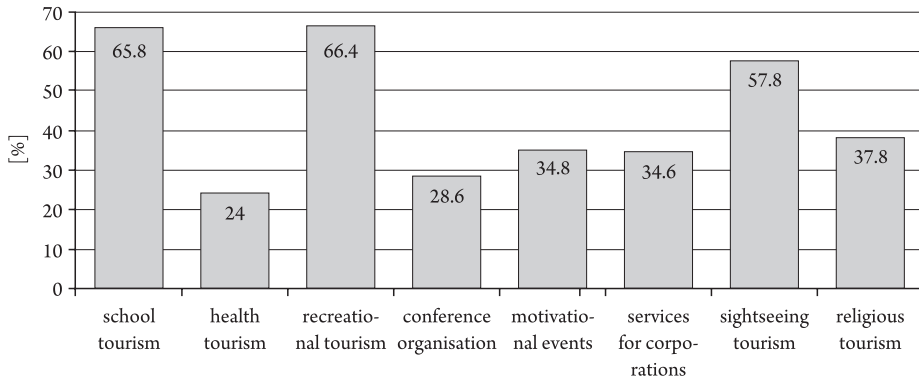
The demand for the services of tour leaders and travel guides reported by travel agencies operating in the field of organizing tourist events and acting as intermediaries on behalf of clients in concluding contracts for the provision of tourist services results from the Act² imposing the obligation to provide the client participating in a tourist event with care exercised by persons representing the tour operator and such function is, in principle, performed by a travel guide or a tour leader. The tour operator is obliged to ensure the services of a tour leader who knows the language commonly spoken in the visited country, and when organizing trips for tourists from abroad, the travel agency is obliged to provide the services of a travel guide and tour leader who know a foreign language to enable contact with participants.

However, the need for the services of travel guides that guarantee safety and professional knowledge of the visited areas, cities or locations results not only from the statutory obligations but also from the specificity of tourist events and the expectations of clients, i.e. tourists. The conducted surveys show that the offer of travel agencies is dominated by events in the broad category of recreational tourism (66.4%), followed by school tourism (65.8%) and sightseeing tourism (57.8%) (Chart 2), which shapes the demand for the services of tour leaders (91%) and travel guides (Chart 3). It is worth noting, however, that while the function of a tour leader is inextricably connected to the organisation of almost every tourist event, the cooperation of travel agencies with travel guides is determined by the nature of the offer based primarily on the agenda of events with basic or complementary forms of tourism aimed at learning about the tourist attractions of the visited cities or regions.

The demand for the services of travel guides and tour leaders is characterized by high instability resulting from the seasonality of tourism, as shown in the

² Ustawa z dnia 29 sierpnia 1997 o usługach hotelarskich oraz usługach pilotów wycieczek i przewodników turystycznych, Dz. U. z 2019 r. poz. 238 [Act of 29 August 1997 on hotel services and services of travel guides and tour leaders. Journal of Laws of 2019, item 238].

Chart 2. Forms of tourism characteristic of the investigated travel agencies specialization

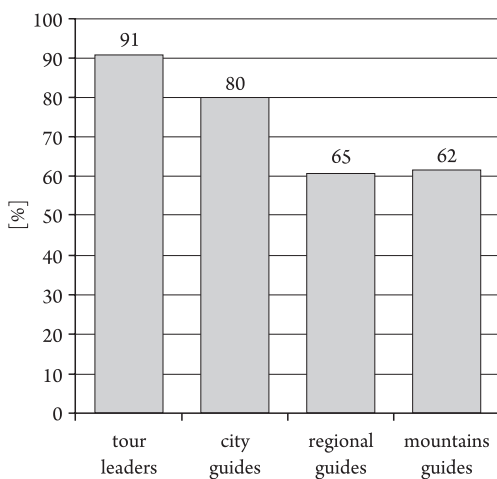


Source: own elaboration.

monthly distribution throughout a year in Chart 4. This illustrates a quite significant irregularity in the reported demand for services of the professional groups in question.

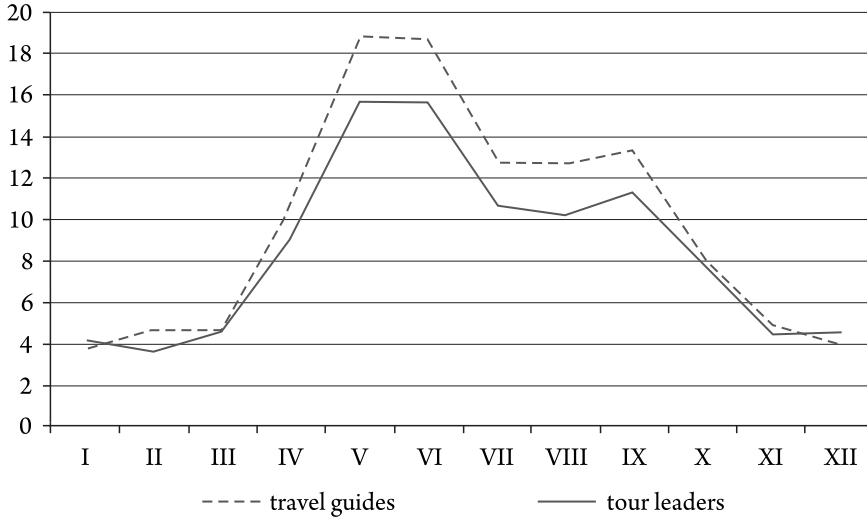
Analysis of the volume of demand reported by the surveyed travel agencies points to the observation that it is related to the distribution of tourist traffic intensity throughout a year, seasonality and it primarily shows that the demand is spatially diversified and largely depends on the tourist attractiveness of a particular region and the activity of travel agencies creating this demand. There-

Chart 3. Travel agencies which declare a demand for the services of travel guides and tour leaders



Source: own elaboration.

Chart 4. Mean number of tourist events offering the services of travel guides and tour leaders in the year 2017, calculated on a monthly basis and realized by a single travel agency



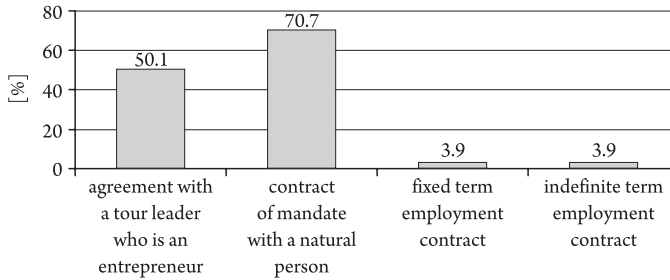
Source: own elaboration.

fore, it seems reasonable that studies of potential labour markets for tour leaders and travel guides should be conducted separately for each region or province. It should also be taken into account that the demand for the services rendered by tour leaders depends on the potential of a given market and the economic and organisational status of travel agencies, and the demand for the services of travel guides is related to and dependent on the attractiveness of a location, place or region defined as tourist destinations.

5.2. Form of cooperation with tour leaders and travel guides preferred by travel agencies

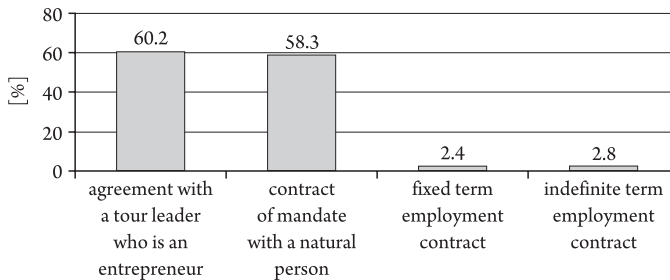
One if the aims was to determine how travel agencies prefer to cooperate with travel guides and tour leaders, separately for both groups, taking into account differences in responsibilities and services provided. According to the statements of the surveyed entrepreneurs, the preferred form of establishing cooperation with tour leaders is a contract of mandate, which is used by 70.7% of travel agencies; it is worth noting that it is the only form of employment for 47.2% of the survey participants. Another preferred form of cooperation is concluding a contract with a tour leader who operates a business (50.1%) and this is the only form of

Chart 5. The preferred form of employment offered to tour leaders by travel agencies



Source: own elaboration.

Chart 6. The preferred form of employment offered to travel guides by travel agencies



Source: own elaboration.

cooperation for more than half (54.3%) of this group (Chart 5). Similar forms of cooperation are preferred when it comes to travel guides. The small difference results from the fact that more often the preferred form of cooperation is concluding a contract with a travel guide who operates a business (60.2%); for 54.1% of this group it is the only form of cooperation. Contract of mandate concluded with a natural person – a travel guide – is slightly less frequent (58.3%) and is the only form of cooperation for 44.9% of travel agencies using this option (Chart 6).

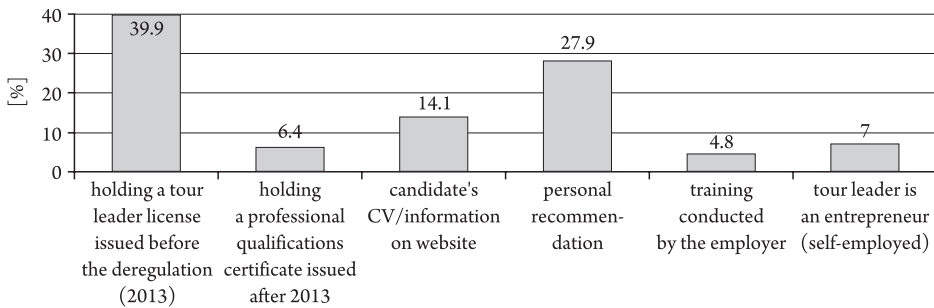
It is worth noting that employment on the basis of a contract of employment for a definite or indefinite period of time in the case of travel guides and tour leaders is very infrequent.

5.3. Factors influencing the decision to cooperate with (employ) tour leaders and travel guides

The decision to cooperate with tour leaders and travel guides is significantly influenced by the responsibility of the tour operator for the quality of individual

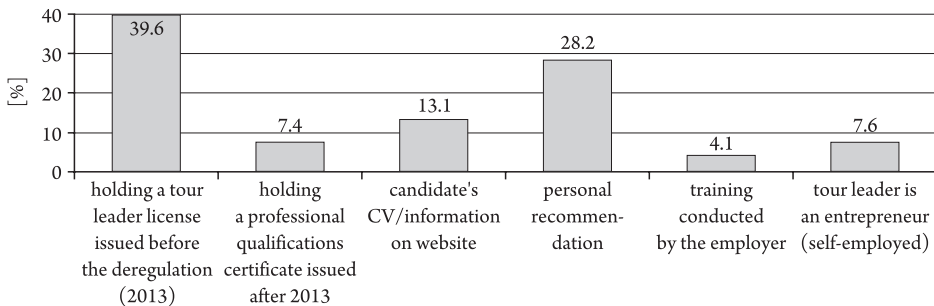
services covered by the tourist event contract. It follows from the surveys that travel agencies are primarily interested in cooperation with persons who were licensed as travel guides or tour leaders before the deregulation of these professions (Chart 7 and 8). Both in the case of tour leaders and travel guides this percentage was almost 40%. However, while in the case of mountain guides, a regulated profession, it is necessary to have and, therefore, verify the qualifications, in other cases, after deregulation of the professions of tour leader, city guide and regional guide, the way of verification, preferred by tourist offices, confirms that in the tourism industry no institution certifying professional qualifications has gained an appropriate position and credibility, which translates into a low percentage of survey participants who recognise certificates of professional competence issued after 2013 (6.4% and 7.4% respectively). The decision of every third surveyed entrepreneur to employ a tour leader or

Chart 7. Factors contributing to making decisions concerning undertaking cooperation with tour leaders



Source: own elaboration.

Chart 8. Factors contributing to making decisions concerning undertaking cooperation with travel guides



Source: own elaboration.

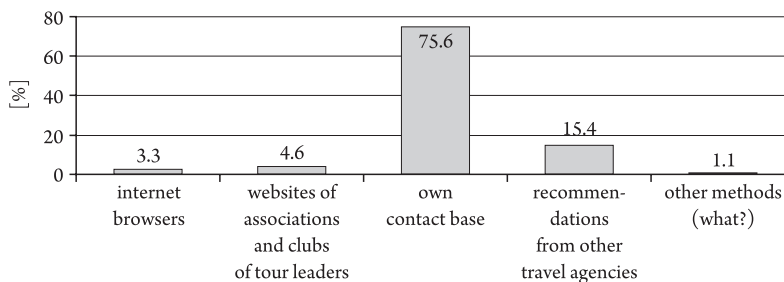
a travel guide is influenced by the opinion and recommendation of a particular person by friends (27.9% and 28.2%), and for more than one in ten – their professional experience presented in their CV and/or on websites (14.1% and 13.1% respectively). The least important factor influencing the decision to cooperate with a tour leader or a travel guide is whether they operate a business and whether the employer conducts own trainings (Chart 7 and 8).

5.4. Methods of seeking tour leaders and travel guides applied by travel agencies

The principles of establishing cooperation with tour leaders and travel guides are determined by the nature of the services they provide and the place of their provision. For travel agencies, these are services provided by external providers, either natural persons or entities, and in this situation the key issue is how to find them to initiate cooperation. Therefore, respondents representing travel agencies were asked to indicate the main source where they search for tour leaders and travel guides and to indicate complementary sources which facilitate establishing cooperation. Analysis of the results lead to the observation that in the case of tour leaders and travel guides, the methods are similar.

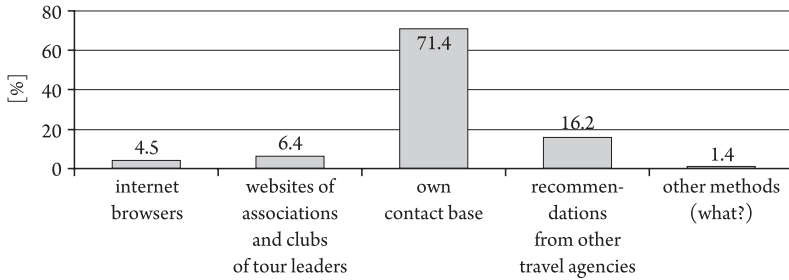
The main source of information in the case of tour leaders (75.6%) and travel guides (71.4%) are contact bases created and maintained by travel agencies. In the next stage of the search the respondents rely on recommendations of travel agencies they know (15.4%; 16.2%) and these entities cooperate in order to confirm the credibility of candidates before starting cooperation. Thriving local associations and clubs of tour leaders and travel guides also have an impact on the recruitment of staff. However, travel guides' websites are used more often than websites of tour leader associations (6.4%; 4.6%). Internet search engines, as in-

Chart 9. Sources of finding tour leaders for cooperation with travel agencies



Source: own elaboration.

Chart 10. Sources of finding travel guides for cooperation with travel agencies



Source: own elaboration.

dictated by the respondents, serve only as a complementary tool in searching for staff. (Chart 9 and 10).

5.5. Conditions for cooperation between travel agencies and tour leaders and travel guides

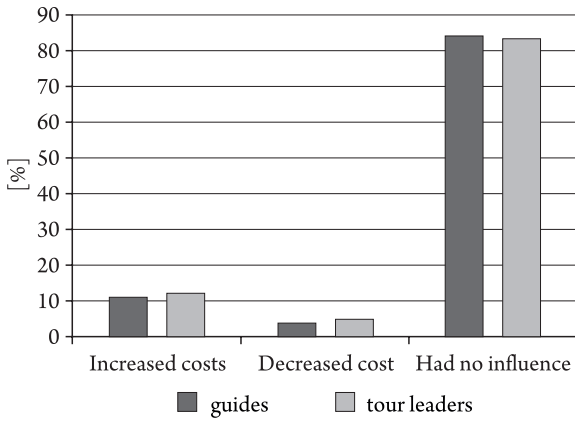
The structure of the market of travel agencies in Poland has a significant impact on shaping the principles of cooperation between travel agencies on the one hand and tour leaders and travel guides on the other. The market is dominated by micro-entrepreneurs, i.e. entities employing from 0 to 9 employees, which account for 80.8% of this market, and in this group 5.8% of respondents described their activity as self-employment. This is complemented by small enterprises, i.e. entities employing from 10 to 49 employees, which have a 15.4% share of the market, and only a small percentage of companies are medium-sized (2.3%) and large enterprises (1.2%). The market model, based on entities which are small in terms of employment and are often family businesses, has been functioning for over twenty years with slight changes.

The good rapport is confirmed by how travel agencies evaluate the work of tour leaders and travel guides. On a scale from 1 (lowest score) to 10, the work of the staff in both groups was rated very high, and over 90% of grades were from 8 to 10. This may constitute a confirmation that the method adopted by travel agencies of searching staff and confirming their credibility is good.

In order to capture the impact of deregulation of the professions on market relations, travel agencies were asked to assess whether the deregulation had an impact on the costs of hiring tour leaders and travel guides. The answers showed that a vast majority of travel agencies did not notice such a relationship (Chart 11).

In view of the presented results, the answers to the question whether deregulation of the professions affects the quality of services provided by tour leaders and travel guides remain difficult to interpret?

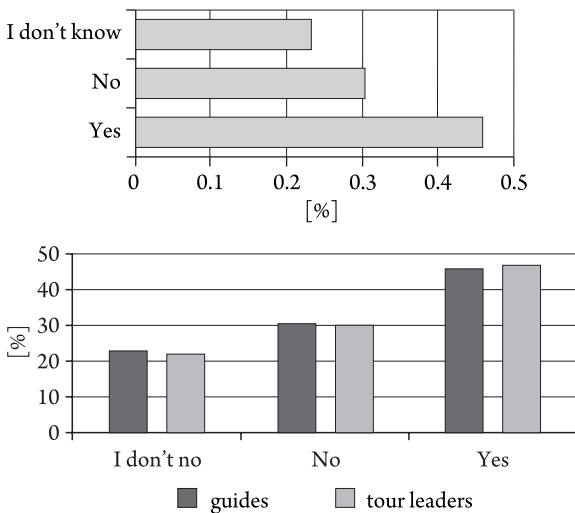
Chart 11. The influence of the deregulation of occupations related to the travel sector on the costs of employment of tour leaders and travel guides



Source: own elaboration.

Almost half of the answers were positive, which, given the employment of staff trained before deregulation and the high appreciation for their work, is an expression of general dissatisfaction with any changes rather than an actual evaluation of the phenomenon (Chart 12).

Chart 12. The influence of the deregulation of occupations related to the travel sector on the quality of the services offered by tour leaders and travel guides



Source: own elaboration.

6. Summary and conclusions

Research on the labour market in tourism is relatively rare and there are few publications on the segment of employees directly providing services to tourists, i.e. travel guides and tour leaders. Their authors most often point out the multitude of roles they play in providing services to tourists and the importance of their work in achieving tourist satisfaction. The research on the labour market of travel guides and tour leaders is in a way trail-blazing. This research was commissioned by the tourist administration and its aim was to diagnose the factors shaping the labour market of the described professional groups in the new legal context related to the deregulation that took place in 2013.

It is interesting to compare the results of our research with previous ones. Thus, in comparison to 2005, as described by K. Podemski [2005], no major changes were observed among the most important groups of employers. They still include tour operators, work establishments, schools and churches. Also, the forms of undertaking cooperation have not changed significantly, and these are still contract of mandate and contract for specific work concluded with individuals or entrepreneurs. Just as it was the case in 2005, those who are professionally active have no problems finding a job.

A study carried out in 2014 [Jańczak 2015] was aimed at assessing the effects of the deregulation in the first year after entry into force. The results indicate a significant deterioration in the economic situation of the surveyed tour leaders and travel guides, a decrease in the amount of work and a deterioration in the quality of services. Our research, conducted 5 years after the deregulation, did not show any decrease in the amount of work. The concerns about the worsening of the economic situation of the respondents were also not confirmed.

Results of our research indicate that the demand for the services provided by tour leaders and travel guides reported by travel agencies and the rules of cooperation depend on the market situation, business profile, seasonality in tourism and the liability of the tour operators in terms of the services provided. Analysing the statements of representatives of the surveyed travel agencies, it may be concluded that the deregulation of the professions has not changed the rules of cooperation with tour leaders and travel guides. The high marks for the quality of services provided are probably due to the relations developed so far with verified and reliable staff. In this relatively short period after the new formal reality emerged, no significant changes in the costs of employing tour leaders and travel guides were noted.

The factors determining the model of cooperation between travel agencies and tour leaders and travel guides include: features of the tourist product, i.e. tourist events and excursions, the process of organization and implementation

of a postponed event, place of service provision, seasonality and financial and organizational possibilities of travel agencies operating on the Polish market. As a result, a model of cooperation between travel agencies and tour leaders and travel guides was established based mainly on civil law contracts and such model is accepted by both parties.

Both parties also think that associations and clubs associating tour leaders and travel guides are beneficial in that they greatly facilitates the establishment of market relations, confirm their competences and provide opportunities to improve qualifications.

References

- Aynalem S., Birhanu K., Tesefay S., 2016, Employment Opportunities and Challenges in Tourism and Hospitality Sectors, *Journal of Tourism Tourism & Hospitality*, 5: 257, doi: 10.4172/2167-0269.1000257.
- Ap J., Wong K.K.F., 2001, Case study on tour guiding: Professionalism, issues, and problems, *Tourism Management*, 22(5), 551-563.
- Badanie rynku pracy w sektorze przewodników turystycznych i pilotów wycieczek* (2018). Raport z badań zrealizowanych przez zespół pracowników AWF Kraków na zlecenie Ministerstwa Sportu i Turystyki, nr 2917.127/2508/BPT/DT.
- Chang K.C., 2014, Examining the effect of tour guide performance, tourist trust, tourist satisfaction, and flow experience on tourists' shopping behavior, *Asia Pacific Journal of Tourism Research*, 19(2), 219-247, doi.org/10.1080/10941665.2012.739189.
- Cohen E., 1985, The tourist guide, *Annals of Tourism Research*, 12: 5-29.
- Geva A., Goldman A., 1991, Satisfaction measurement in guided tours, *Annals of Tourism Research*, 18: 177-185.
- Gryszel P., 2007, Usługi przewodnictwa i pilotażu wycieczek jako element obsługi ruchu turystycznego. Wybrane problemy kształcenia i wykonywania zawodu, in: W. Kurek, R. Pawlusiński (eds.), *Studia nad turystyką. Prace ekonomiczne i społeczne*, Kraków: Uniwersytet Jagielloński, 45-54.
- Gryszel P., Kruczek Z., 2007, Rynek pracy pilotów i przewodników turystycznych, in: B. Ząbczyk-Chmielewska, M.A. Kozłowska (eds.), *1 Międzynarodowy Sejmik Przewodnicki. Przewodnictwo turystyczne i pilotaż wycieczek w Polsce a standardy europejskie*, Sopot, 51-69.
- https://turystyka.gov.pl/ceoptip_p_84.html [accessed: 30.04.2018].
- Jańczak K., 2015, *Badanie ekonomicznych skutków deregulacji zawodów przewodnika turystycznego i pilota wycieczek w Polsce. Raport z badań zamówionych przez Ministerstwo Sportu i Turystyki*, Łódź: Activ Group.
- Kozłowska D., 2006, Profesjonalizacja zawodu pilota wycieczek, *Roczniki Naukowe Wyższej Szkoły Wychowania Fizycznego i Turystyki w Supraślu*, 2: 113-118.
- Kruczek Z., 2000, Losy zawodowe pilotów wycieczek zagranicznych, *Folia Turistica*, 8: 119-140.

- Kruczek Z., 2006, Przewodnicy i piloci w gospodarce turystycznej. Główne problemy środowiska i zawodu, in: S. Wodejko (ed.), *Gospodarka turystyczna a grupy interesu*, Warszawa: Oficyna Wydawnicza SGH, 177-186.
- Kruczek Z., 2008, Czynniki determinujące rynek pracy pilotów wycieczek i przewodników turystycznych, *Zeszyty Naukowe Uniwersytetu Szczecińskiego* nr 496, *Ekonomiczne Problemy Turystyki*, 19: 57-70.
- Kruczek Z. (ed.), 2011, *Obsługa ruchu turystycznego. Teoria i praktyka*, Kraków: Proksenia.
- Ladkin A., 2011, Exploring Tourism Labor, *Annals of Tourism Research*, 38(3), 1135-1155.
- Mikos von Rohrscheidt A., 2014, *Współczesne przewodnictwo miejskie. Metodyka i organizacja interpretacji dziedzictwa*, Kraków-Poznań, Proksenia & Kul.Tour.pl.
- Podemski K., 2005, Polscy przewodnicy o sobie w dobie wejścia Polski do Unii Europejskiej, in: Z. Kruczek (ed.) *Pilotaż i przewodnictwo – nowe wyzwania*, Kraków: Proksenia, 13-27.
- Rabotić B., 2010, Tourist Guides in Contemporary Tourism, in: *International Conference on Tourism and Environment, Philip Noel-Baker University, Sarajevo, Bosnia & Herzegovina, 4-5 March, 2010*, 353-364.
- Rabotić B., 2011, *Tour Guiding as Profession: Perceptions and Self-Perceptions of Guides in Serbia*. 2nd IRFGT (International Research Forum on Guided Tours), University of Plymouth (Plymouth, UK), April 7-9.
- Rudmi Chehanika Sandaruwani J.A., W.K. Athula C. Gnanapala, 2016, The Role of Tourist Guides and their Impacts on Sustainable Development: A Critique on Sri Lanka, *Tourism, Leisure and Global Change*, 3: 63-73.
- Pereira A.M., 2015, Tour Guides and Destination Image: Evidence from Portugal, *Journal of Tourism and Hospitality Management*, 3(7-8): 129-150, doi: 10.17265/2328-2169/2015.08.001.
- Salazar N.B., 2005, Tourism and glocalization "Local" Tour Guiding, *Annals of Tourism Research*, 32(3): 628-646.
- Weiler B., Davis D., 1993, An exploratory investigation into the roles of the nature-based tour leaders, *Tourism Management*, 14: 91-98.
- WTTC, 2018, *Travel & Tourism. City Travel & Tourism Impact 2018*, <https://www.wttc.org/-/media/files/reports/economic-impact-research/cities-2018/city-travel-tourism-impact-2018final.pdf> [accessed: 15.11.2019].
- Xiao H., Smith, S.J.J., 2006, The making of tourism research. Insights from a social science journal, *Annals of Tourism Research*, 33: 490-507.

Ocena popytu na usługi przewodników turystycznych i pilotów wycieczek

Streszczenie. Artykuł prezentuje wyniki empirycznych badań nad rynkiem pracy przewodników miejskich, terenowych, górskich i pilotów wycieczek. Celem opracowania jest ocena zapotrzebowania na usługi przewodników turystycznych i pilotów wycieczek. Badaniami objęto przedsię-

biorców turystycznych. Zastosowano metodę sondażu diagnostycznego z wykorzystaniem techniki telefonicznego wywiadu kwestionariuszowego (CATI). Uzyskane wyniki potwierdziły tezę, że rynek pracy przewodników i pilotów wycieczek nie jest stabilny i wynika to z sezonowości, poziomu zarobków oraz zmieniającego się modelu organizacji podróży. W pracy wykazano również, że w pięcioletnim okresie od deregulacji zawodów relacje rynkowe łączące pilotów wycieczek i przewodników turystycznych z przedsiębiorcami turystycznymi nie uległy zasadniczym zmianom. Wyniki badań mogą być przydatne dla organizatorów turystyki, organizacji zrzeszających przewodników i pilotów oraz dla administracji turystycznej szczebla centralnego i regionalnego.

Słowa kluczowe: przewodnicy turystyczni, piloci wycieczek, usługi, popyt