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The Position of Lower Silesia on Domestic and International Tourist Market

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THE POSITION OF LOWER SILESIA ON DOMESTIC AND INTERNATIONAL TOURIST MARKET

Abstract

The article presents the position of Lower Silesia on the domestic and international tourist market. The data used here concern the potential of tourist value, the volume of tourist accommodation, the number of domestic and international tourists making use of the accommodation and the number of their stays. The perspectives of tourism development in Lower Silesia are also presented.

Keywords: Lower Silesia, tourist group accommodation facility, domestic tourism, international tourism, tourist market

Introduction

Lower Silesia as a historic region may, as a certain simplification, be identified with the Lower Silesian Voivodeship, which occupies about 19.9 thousand km², i.e. 6.4 % of Poland's territory. The voivodeship is connected with a few large geographic regions: the Silesian Lowland, the Silesian-Sorbian Lowland, the Sudetean Foothills and the Sudetes. Lower Silesia, especially the Sudetes, belong to the most attractive areas in Poland boasting a long tourist tradition. This appeal comes from, among others: landscape values (two national parks, over a dozen landscape parks), natural wonders (caves, waterfalls, river breaks, picturesque rock formations), numerous spa towns, good skiing areas, rich

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and multinational cultural heritage and the location on the crossroads of important European routes as well as bordering the Czech Republic and Germany. This potential creates wide perspectives for the development of domestic and international tourism. Determining the current position of Lower Silesia on the domestic and international tourist market is the purpose of the paper. This research is based on the review of literature concerning spatial aspects of tourism in Central and Eastern Europe, and in Poland, with particular attention paid to tourist potential of the areas, current ways of use and perspectives of future development (among others: Wyrzykowski 1995, 1997, 2007, Marak, Wyrzykowski, 2012). Theoretical framework of the analyses presented in this research is available, among others, in “Turystyka w ujęciu interdyscyplinarnym” [Interdisciplinary approach to tourism] eds. J. Wyrzykowski, J. Marak (2010).

1. Lower Silesia on the domestic tourist market

The Sudetes play the most important part in the Lower Silesian tourism. T. Lijewski et al.¹ (2008) include them into seven main tourist regions of Poland. Within the Sudetes four sub-regions (more important tourist regions) may be distinguished: the Jelenia Góra Sudetes, the Wałbrzych Sudetes, the Kłodzko Sudetes and the West Sudetean Foothills. Moreover, the more important tourist areas of Lower Silesia are: the Ślęża Massif, the Trzebnickie Hills, The Lower Silesian Forest with the Kwisa River Valley, the Barycz River Valley, the Odra River Valley and Wrocław (as a large tourist center) with its surroundings.

The sightseeing potential of the region is illustrated by Chart 1. Against the rest of Poland Lower Silesia stands out taking into account, among other things, the number of landscape parks, objects of UNESCO World Heritage sites, Polish monuments of history and immovable relics.

¹ T. Lijewski, B. Mikułowski, J. Wyrzykowski, *Geografia turystyki Polski* (5th edition), PWE, Warszawa 2008.

Table 1

Potential of sightseeing values in Lower Silesia as compared to the rest of Poland

No.	Features of potential	Poland	Lower Silesia	% share
1	Number of national parks	23	2	8.7
2	Number of landscape parks	122	13	10.6
3	Number of nature reserves	1469	66	4.5
4	Number of UNESCO World Heritage Sites	14	2	14.3
5	Number of monuments of history	54	7	13.0
6	Number of immovable relics	66424	8173	12.3
7	Number of museums and museum branches	768	58	7.5

The current position of Lower Silesia on the domestic tourist market will be described by the volume of tourist accommodation and the number of domestic tourists using it, as well as by the number of their overnight stays.

Taking into account the total number of beds for tourists in group accommodation facilities Lower Silesia (the Lower Silesian Voivodeship) with accommodation base of around 50 thousand beds occupies the fourth position in the country following the West Pomeranian, Pomeranian and Lesser Poland Voivodeships (Table 2). It is noteworthy that after World War II for a long time Lower Silesia was considered to be a well-developed area, thus not requiring special attention and as a result it kept losing its outstanding position on the map of tourist development of Poland.² The structure of tourist accommodation base shows a big share of hotels (56.4%) and a comparatively small share of beds in spa facilities (1.4 thousand), which may be explained by some inefficiency of Central Statistical Office's data.³ The signaling information for The Statistical Office in Wrocław for year 2012⁴ states 3.7 thousand beds in spa facilities. The largest number of beds occurs in Wrocław and the Jelenia Góra and Kłodzko powiats.

² *Turystyka na Dolnym Śląsku. Stan i kierunki rozwoju*, J. Wyrzykowski (ed), Akademia Wychowania Fizycznego we Wrocławiu, Wrocław 2004.

³ *Rocznik Statystyczny Województwa Dolnośląskiego 2012*, Urząd Statystyczny we Wrocławiu, Wrocław 2012 (ASSETS_ROCZNIK_TI_2013); *Turystyka w 2011 roku*, GUS, Warszawa 2012.

⁴ *Turystyka w województwie dolnośląskim w 2012 r. Informacja sygnałowa*, Urząd Statystyczny we Wrocławiu, Wrocław 2013 (ASSTS_sygnalna_turystyka_2012).

Table 2

Beds available for tourists in group accommodation facilities
in year 2011 by voivodeships

Voivodeship	Total	Hotels	Other accommodation facilities
Lower Silesian	49 551	27 942	21 609
Kuyavian-Pomeranian	24 274	8 964	15 310
Lublin	18 232	6 994	11 238
Lubusz	18 944	7 531	11 413
Łódź	20 245	12 534	7 711
Lesser Poland	73 319	37 097	36 222
Masovian	42 781	31 193	11 588
Opole Silesian	8 213	2 923	5 290
Subcarpathian	21 591	7 841	13 750
Podlaskie	11 032	5 151	5 881
Pomeranian	78 115	20 439	59 676
Silesian (Upper Silesian)	42 053	23 881	18 172
Świętokrzyskie	12 106	6 514	5 592
Warmian-Masurian	37 810	14 746	23 064
Greater Poland	41 304	21 394	19 910
West Pomeranian	106 676	17 367	89 309
Poland	606 246	252 511	353 735

Source: *Tourism in 2011*, Central Statistical Office (GUS), Warszawa 2012.

According to the Statistical Yearbook for the Lower Silesian Voivodeshp⁵ up to the half of year 2012 (as of 31.07.) the number of tourist beds in Lower Silesia increased to 59.1 thousand. This means a growth of 19.2% which might be associated with the region's preparations to the European football championships.

Tourist accommodation base in Lower Silesia in 2011 was used by 1.6 million domestic tourists, which constitutes 9.4% of total. A vast majority (67%) stayed in hotels. In catering to domestic tourists in 2011 Lower Silesia took the third position after the Masovian (2.3 million) and the Lesser Poland Voivodeships (2.2 million) and before the Silesian (1.5 million), the West Pomeranian (1.5 million), the Greater Poland (1.4 million) and the Pomeranian (1.4 million) Voivodeships.

⁵ *Rocznik Statystyczny Województwa Dolnośląskiego 2013*, Urząd Statystyczny we Wrocławiu, Wrocław 2013.

Table 3

Domestic tourists staying in tourist group accommodation facilities
in year 2011 by voivodeships

Voivodeship	Total	Hotels	Other accommodation facilities
Lower Silesian	1 595 981	1 100 326	495 655
Kuyavian-Pomeranian	737 318	490 855	246 463
Lublin	557 275	371 016	186 259
Lubusz	493 105	360 583	132 522
Łódź	921 556	706 276	215 288
Lesser Poland	2 192 056	1 313 795	878 261
Masovian	2 335 117	2 011 829	323 288
Opole Silesian	209 208	113 654	95 554
Subcarpathian	648 965	407 485	241 480
Podlaskie	383 329	269 895	113 434
Pomeranian	1 379 167	787 575	591 592
Silesian (Upper Silesian)	1 530 869	1 055 235	475 634
Świętokrzyskie	406 947	309 767	97 180
Warmian-Masurian	807 045	584 679	222 366
Greater Poland	1 407 259	1 040 051	367 208
West Pomeranian	1 461 905	578 450	883 455
Poland	17 067 066	11 578 068	5 488 998

Source: *Tourism in 2011*, Central Statistical Office (GUS), Warszawa 2012.

Authors of vast research on tourist traffic in Lower Silesia in 2007⁶ used results of their questionnaire poll and estimated the number of visitors to the region (both domestic and international) in the following way:

number of tourists in categorized base according to CSO	1 849 727 people
number of one-day tourists (25%)	462 432 people
number of tourists staying at their friends' (21.3%)	393 992 people
number of tourists in uncategorized base (18.2%)	336 650 people
total	3 042 801 people

⁶ *Raport z badań ruchu turystycznego na Dolnym Śląsku i we Wrocławiu w 2007*, Dolnośląska Organizacja Turystyczna, Wrocław 2007 (Badanie_Ruchu_Turystycznego_na_Dolnym_Slasku-2007).

This estimate shows that the degree to which tourist facilities are used in Lower Silesia is far greater than described by indexes based on CSO's data. It concerns both domestic and international tourists.

A survey on tourist traffic in 2012⁷ shows, that the most often visited in Lower Silesia (by visitors from Poland and abroad) were: Wrocław (52.9 marks), Karpacz (27.8), Szklarska Poręba (11.5), Jelenia Góra (9.6), Kudowa-Zdrój (8.9), Duszniki-Zdrój and Wałbrzych (6.4 each), Kłodzko (6.3), Polanica-Zdrój (6.0) and Legnica (5.2).

In year 2011 domestic tourists had 4.0 million stays in group facilities, which is 8.5% of total stays for domestic tourists. Just as with the number of beds available, as far as the number stays of domestic tourists is concerned Lower Silesia took the fourth position in the country after West Pomerania (7.7 million stays), Lesser Poland (6.2 million) and Pomerania (5 million). Most stays in Lower Silesia was in hotels, whereas in the whole of Poland domestic tourism was dominated by stays qualified as "other accommodation types", which mostly were holiday resorts and training-leisure centers.

Table 4

Overnight stays of domestic tourists in tourist group accommodation facilities in year 2011 by voivodeships

Voivodeship	Total	Hotels	Other accommodation facilities
Lower Silesian	3 970 628	2 228 777	1 741 851
Kuyavian-Pomeranian	2 625 491	782 371	1 843 120
Lublin	1 341 663	562 425	779 238
Lubusz	1 086 854	563 428	523 426
Łódź	1 713 577	1 122 225	591 352
Lesser Poland	6 219 067	2 899 668	3 319 399
Masovian	3 882 121	3 066 896	815 225
Opole Silesian	488 714	217 871	270 303
Subcarpathian	1 955 199	706 569	1 248 630
Podlaskie	765 247	437 387	327 860

⁷ *Badania ruchu turystycznego na Dolnym Śląsku w ujęciu powiatowym i subregionalnym wg Aktualizacji Programu Rozwoju Turystyki dla Województwa Dolnośląskiego. Raport końcowy, Urząd Marszałkowski Województwa Dolnośląskiego, BIOSTAT, Wrocław 2012, (<http://www.turystyka.dolnyslask.pl/images/stories/wiadomosci5/badanie%20ruchu%20turystycznego%20>).*

Voivodeship	Total	Hotels	Other accommodation facilities
Pomeranian	4 969 296	1 656 913	3 312 383
Silesian (Upper Silesian)	3 998 682	2 008 846	1 989 836
Świętokrzyskie	1 183 112	593 803	589 309
Warmian-Masurian	2 108 001	1 133 423	974 578
Greater Poland	2 527 271	1 556 973	970 298
West Pomeranian	7 693 066	1 246 837	6 446 229
Poland	46 527 989	20 784 952	25 743 037

Source: *Tourism in 2011*, Central Statistical Office (GUS), Warszawa 2012.

2. Lower Silesia in the international tourist market

Lower Silesia is highly attractive for international tourists. The areas of highest appeal are the Karkonosze National Park and the Table Mountains National Park, of high appeal – The Ślęza Massif Landscape Park, the Sowie Mountains Landscape Park and the Śnieżnik Landscape Park.⁸ The huge potential of cultural values of Lower Silesia, which constitutes a shared heritage of the Poles, the Czechs the Austrians and the Germans, creates exceptional predispositions for the development of culture tourism and preparing common tourist offers in this scope with the Land of Saxony and the northern Czech Republic, maybe also with the city of Prague. This could draw the attention of foreign visitors, maybe even from outside Europe. Some towns of international significance might become: Duszniki-Zdrój, Henryków, Jawor, Jelenia Góra, Kamieniec Ząbkowicki, Karpacz, Kłodzko, Krzeszów, Książ (a district of Wałbrzych), Kudowa-Zdrój, Lądek-Zdrój, Legnica, Legnickie Pole, Lubiąż, Polanica-Zdrój, Szklarska Poręba, Świdnica, Trzebnica, Wambierzyce and Wrocław.⁹

The current position of Lower Silesia on the international tourist market will be expressed with the number of foreign tourists making use of the tourist accommodation base of the region as well as the number of their overnight stays.

In 2001 tourist facilities of collective accommodation in Lower Silesia was used by 430.7 thousand international visitors. This constitutes 9.8% of the to-

⁸ T. Lijewski, B. Mikułowski, J. Wyrzykowski, op. cit.

⁹ *Turystyka na Dolnym...*

tal number of international tourists making use of accommodation facilities in Poland. Lower Silesia took the third position among all voivodeships, after Masovian and Lesser Poland voivodeships. The vast majority of foreign tourists in Lower Silesia (86.3%) stopped in hotels. More than a half of them used accommodation facilities in Wrocław. Some powiats: Jelenia Góra, Zgorzelec, Kłodzko and Lubań also stood out as far as the number of international tourists making use of qualified accommodation base was concerned.

Table 5

International tourists in tourist group accommodation facilities
in year 2011 by voivodeships

Voivodeship	Total	Hotels	Other accommodation facilities
Lower Silesian	430 745	371 854	58 891
Kuyavian-Pomeranian	84 170	75 155	9 015
Lublin	97 835	91 870	5 965
Lubusz	176 501	167 176	9 325
Łódź	126 630	119 635	6 995
Lesser Poland	943 315	823 317	119 998
Masovian	976 793	936 092	40 701
Opole Silesian	32 346	28 623	3 723
Subcarpathian	69 946	62 518	7 428
Podlaskie	90 293	76 010	14 283
Pomeranian	282 373	250 361	32 012
Silesian (Upper Silesian)	274 151	251 587	22 564
Świętokrzyskie	28 073	25 396	2 677
Warmian-Masurian	152 382	138 678	13 704
Greater Poland	242 343	226 284	16 059
West Pomeranian	401 654	262 866	138 788
Poland	4 409 550	3 907 422	502 128

Source: *Tourism in 2011*, Central Statistical Office (GUS), Warszawa 2012.

Among international tourists staying in 2011 in Lower Silesia these were the Germans who were most numerous (41% of total). Others were: the Russians (10.3%), the British (5%), the French (4%), the Spanish and Italians (3.5% each), the Ukrainians (3.2%), the Dutch (2.8%), the Czechs (2.4%) and tourists from the USA (2.2%) (*Tourism in Lower Silesia...*, 2012).

In 2012 Wrocław was one of the organizing cities for European Football Championships, thus the number of international tourists increased to 483.9 thousand. That meant a growth of over 12%, significant, but below expectations. The share for German tourists reached 38.1% and apart from them other more frequent nations were: the Russians (13.7 %), the English (4.5 %), the Ukrainians (3.9 %) and the French and Italians (3.6 % each) (Statistical Yearbook for the Lower Silesian Voivodeship 2013, 2013).

In research concerning tourist traffic in year 2012 in Lower Silesia (Research of Tourist Traffic..., 2012) results concerning the structure of nationalities of foreign visitors was a little different. The Germans obviously took the first position (90.0 positive answers in analyzed accommodation facilities), next came the Russians (19.6), the Ukrainians (17.4), the Dutch (15.5), the Czechs (15.1), the English (13.2), the French (11.9), the Italians (5.9) and tourists from the USA (5.5). Lower Silesian tourism organizers emphasize the growing share of visitors from Russia and the Ukraine.

In 2011 international tourists scored over a million (1 028 065) stays in tourist accommodation facilities. That made the region fourth in Poland in this category after West Pomeranian, Lesser Poland and Masovian Voivodeships. An average stay of a foreign tourist lasted 2.4 nights.

Table 6

Overnight stays of international tourists in tourist group accommodation facilities in year 2011 by voivodeships

Voivodeship	Total	Hotels	Other accommodation facilities
Lower Silesian	1 028 065	826 951	201 114
Kuyavian-Pomeranian	192 288	162 460	29 828
Lublin	145 998	131 815	14 183
Lubusz	246 682	221 551	25 131
Łódź	267 350	227 762	39 588
Lesser Poland	2 175 036	1 861 105	313 931
Masovian	1 740 860	1 660 715	80 145
Opole Silesian	79 949	67 768	12 181
Subcarpathian	153 253	127 915	25 338
Podlaskie	136 448	113 987	22 461
Pomeranian	729 170	618 325	110 845
Silesian (Upper Silesian)	585 390	516 547	68 843

Voivodeship	Total	Hotels	Other accommodation facilities
Świętokrzyskie	65 510	54 566	10 944
Warmian-Masurian	362 095	316 661	45 434
Greater Poland	485 049	441 293	43 756
West Pomeranian	2 234 941	1 055 791	1 179 150
Poland	10 620 264	8 397 392	2 222 872

Source: *Tourism in 2011*, Central Statistical Office (GUS), Warszawa 2012.

In 2012 the number of overnight stays of international tourists in Lower Silesia grew to 1128.8 thousand, which meant an increase of 9.8%. An average tourist stayed 2.6 nights.

The current position of Lower Silesia on the international tourist market is unsatisfactory and it does not represent the potential of the region as expressed by its tourist values.

Perspectives

In “The Strategy for the Development of the Lower Silesian Voivodeship 2020” (2013) the main development directions in the region were determined as: the development of manufacturing based on mining industry and the development of tourist services on the basis of rich values of the natural and cultural environment. As a consequence the region should in future play a much more significant role on the domestic and international tourist market.

Taking into account all factors determining the development of tourism in Lower Silesia, to-date tourist offer of the region and current trends in European and Polish tourism, it is possible to point to a few branded products with the capacity to be tourist packages, which nowadays have the best chance of success and around which the strategy of tourist development of a region should be built. These are: active tourism, culture tourism, spa tourism, business tourism and weekend tourism (Turystyka na Dolnym Śląsku..., 2004).

Active tourism includes varied forms of active recreation in natural environment, such as swimming and water sports, hiking, cycling, canoeing, horse riding, field games, downhill skiing and cross country skiing, sledging, ice-skating and activities referred to as specialized or qualified tourism, such as sailing, mountain climbing, rock climbing, speleology, aviation sports, etc. Such product should be addressed to regional, domestic and international tourism both within the short term and long term tourism.

Choosing active tourism to be the branded product is justified by current tendencies in European and Polish tourism, results of research on tourist preferences of the Poles, wide promotion of healthy lifestyle in mass media and arguments from the medical world supporting active lifestyle as a protection against diseases of civilization. Recognizing the product to be the branded one is also supported by especially advantageous environmental factors facilitating the development of many forms of physical activity in the region.

Cultural tourism includes sightseeing tourism targeting objects of cultural heritage, ethnic tourism (sentimental) geared towards visiting objects of national cultural heritage which were left behind borders of a country of residence, as well as religious and pilgrimage tourism. The exceptional value of Lower Silesian multicultural heritage has already been mentioned above.

Spa tourism boasts a specially long tradition in Lower Silesia. The region, particularly the Sudetes, has always been treated as a large spa region in Poland. The accession of Poland to the European Union bringing about further facilitation in travel and taking treatment, but also the process of European societies aging, which also applies to the Polish society, more attention paid to keeping fit among working people – all of them should bring about further growth of demand in spa services. The offer of spa tourism should be targeted at both domestic and international tourists. As far as international tourists are concerned these should be the Germans that might be expected to show most interest.

Business tourism includes business trips, participation in fairs, congresses and conferences, taking part in professional trainings, integration events for employees. Business tourism constitutes an important segment of tourist market in many regions and towns, however it must be mentioned that Lower Silesia has particular predispositions to develop this type of product due to its large economic significance in trans-region and international co-operation as well as its location at the crossroads of important European routes and in the borderland between Poland, Germany and the Czech Republic. The offer should be aimed at both domestic and international tourists.

The acknowledgement of transit tourism as a branded product of Lower Silesia was determined by the regions location at the crossroads of important European routes. The development of transit tourism is facilitated by its being the borderland between Poland, Germany and the Czech Republic. Handling transit traffic of both people and merchandise includes accommodation, catering, tourist, cultural, sports and recreation services and may make the sector of ser-

vices an important branch of tourist industry. The offer should target domestic and international tourism.

Weekend tourism takes a special place among branded tourist products. Variety and a high rank of tourist values and good (though in need of further improvement) accessibility in the region may determine that short term, weekend, offers aimed at the very region's inhabitants, inhabitants of neighboring regions (particularly of Greater Poland, Opole Silesia and Upper Silesia), but also German and Czech agglomerations like Berlin, Dresden or Prague, may become especially attractive. Weekend tourism might make use of products of active, cultural and spa tourism. This type of offer may also prove attractive for business and transit tourists.

It might also be advantageous to build common tourist offer together with the German Land of Saxony and the northern parts of the Czech Republic (including Prague), which could attract the attention of foreign visitors, even from outside Europe.

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POZYCJA DOLNEGO ŚLĄSKA NA KRAJOWYM I MIĘDZYNARODOWYM RYNKU TURYSTYCZNYM

Streszczenie

W artykule przedstawiono pozycję Dolnego Śląska na krajowym i międzynarodowym rynku turystycznym. Wykorzystane dane dotyczą wartości potencjału turystycznego, wielkości bazy turystycznej, liczby turystów krajowych i zagranicznych korzystających z noclegów i liczby ich pobytu. Przedstawione zostały również perspektywy rozwoju turystyki na Dolnym Śląsku.

Słowa kluczowe: Dolny Śląsk, turystyka krajowa, turystyka międzynarodowa, rynek turystyczny