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COMPARISON OF CITY BREAK TRIPS IN THE OFFER OF POLISH AND BRITISH TOUROPERATORS AND ONLINE TOURIST AGENCIES

Annotation. The development of the city break travel market is almost inseparably connected with the development of low-cost airlines, whose dense network of connections has for several years made flights to almost all major European cities possible at relatively low prices. Taking advantage of such easy accessibility, the majority of travel agencies offer trips advertised under the term "city break". However in the past years it was common for this catchy term to be used to describe also classic round trips in several cities, most often European capitals, which meant that their itineraries did not always fit in the definition of this relatively new form of travel. Are such practices still used by travel agencies? The aim of this article is to answer this question, preceded by an analysis of city break itineraries for 2022 offered by selected European tour operators and travel agencies. An additional aim is to examine changes in the market of the most popular city break destinations that occurred during the COVID-19 pandemic.

Keywords: city break; weekend trips; urban tourism; touroperators; travel agencies.

Introduction

The development of low-cost airlines occurred in parallel with a change in sociological and economic aspects related to travel and leisure, which was highlighted in Europe in the first decade of the 21st century when Europeans began to travel more frequently, including more often shorter holidays, in addition to traditional two-week holidays [1-3]. These processes were facilitated by the affordability of airline tickets and the ease of booking accommodation online, which, along with the growing economic independence of the younger generation, resulted in the emergence of weekend party tourism, including clubbing, stag and hen parties [4-5]. Along with this type of travel, other motives for short-term trips e.g. cultural, educational or narrow interest-related, have entered a branch of tourism called city break. This branch can be defined as short-term, usually weekend trips to an attractive tourist city, without an overnight stay in any other destination [1].

City breaks usually contain only two components: transport and accommodation, while transport is mainly provided by low-cost airlines and accommodation is chosen from the offer of facilities located in city centres [3]. Although various types of intercity transport (coaches, trains, sea ferries, traditional airlines) have been present for many decades, the emergence of cheap lines has caused fundamental changes in the tourist market, the result of which was, among others, flourishing of city break tourism [2, 6-9]. The popularity of this form of trips had an impact on the offer of travel agencies, which, in addition to traditional travel destinations, started to offer simple weekend packages to the most popular cities in Europe. However, often under this name, travel agencies offered ordinary bus tours, although in attractive cities (e.g. Paris, Brussels, Amsterdam during one trip), but by the definition they were not city breaks and were evidence of the misuse of the fashionable term in tourism [10-11].

The popularity of city break was one of the reasons for the phenomenon of overtourism in the most popular tourist cities, which caused many tensions between the inhabitants of these cities and tourists [12]. The COVID-19 pandemic, however, contributed to a drastic decline in tourist traffic around the world, including in urban tourism destinations, paradoxically caused the emptying of previously crowded streets and squares in many city centers. Travel restrictions, which have been introduced especially for unvaccinated people, along with the ever-changing legal regulations in many countries affected by the pandemic, undoubtedly influenced the content of travel agencies' offers, including urban tourism trips [13].

The main aim of this article is to identify the changes that have occurred in the city break market in recent years, and the main questions are related to various aspects of these changes: (1) have there been any changes in the popularity of city break destinations in relation to the pre-pandemic period? (2) has the number of cases and deaths from COVID-19 in



given countries influenced travel agencies in the aspect of their city break offer? (3) do travel agents still abuse the term city break by advertising tours that are basically a different type of travel?

In order to answer these questions, an analysis of city break offers of selected Polish and British travel agencies for 2022 was carried out, and the results were compared with the results of the city break market research from 2019 [11], i.e. from the period immediately before the pandemic. An additional aim of the article was to compare the mature city break market in the British Isles with the Polish market, which appeared almost a decade later as a result of this country's accession to the European Union.

Materials and methods

As one of the aims of the article was to compare the current city break trends with the results of the 2019 survey [11], the same method was used to select the most popular destinations using the positioning of websites in the google chrome search engine. This search engine has been the most popular among Europeans for years [14]. Due to the growing importance of the Internet in the decision-making process, especially among city break tourists, the authors concluded that the method used would be sufficiently reliable.

For the analysis of the city break offers, data from online travel agencies (OTA) displayed on the first result page after entering the phrases “city break” and “city break weekend trips” were selected. The choice of such simple phrases allowed, in the opinion of the authors, to obtain reliable data on leading tour operators in the field of city break tours, as well as the most popular offers and destinations.

Out of the total number of over 3.3 billion results obtained for the phrase “city break” (there were 2 billion results in 2019, so there was an increase in the interest in such type of trips), the first page of the results included the following travel agencies targeting Polish tourists: esky.pl, Itaka, TUI, Rainbow Tours, fostertravel.pl, wakacje.pl, wakacyjnipiraci.pl, fly.pl, bluesky.pl, fly4free.pl. After entering the phrase “city break weekend trips”, the English-language results on the first page were as follows: lastminute.com, britishairways.com, cassidytravel.ie, loveholidays.com, thomascook.com, holidaypirates.com, easyjet.com, tui.com.uk.

The ranking of the most popular city break destinations was created taking into account the most frequently occurring cities in the analyzed offers.

Results

The most popular Polish companies offering city break tours can be divided into four main groups. The first one is made up of leading tour operators (Itaka, TUI, Rainbow), who have been in the top three in the overall sales of travel packages in Poland for years [15]. The second group are internet tour operators of less importance in terms of the sale of packages, but they are the leading intermediaries in flight tickets reservations (esky.pl, Bluesky). The next group includes travel agencies (Fostertravel, Holidays.pl, Fly.pl), and in the last one are blogs or booking portals, which do not sell the proposed offers themselves, but redirect customers to other entities (Wakacyjnipiraci, Fly4free).

Comparing the analysis of positioning results with the results for 2019, the biggest difference is the fact that the esky.pl tour operator, which is the largest online seller of flight tickets in Poland, had the highest position (Fig. 1). Other changes proving the increase in the role of given companies on the city break market include the appearance of the largest Polish travel agency (Wakacje.pl) and its smaller competitor Fly.pl, as well as an increase in the position of Rainbow Tours. From the first result page, the booking portals FRU.pl and Skyscanner, as well as the tour operator Neckermann, which announced bankruptcy in the second half of 2019 [16], have disappeared.

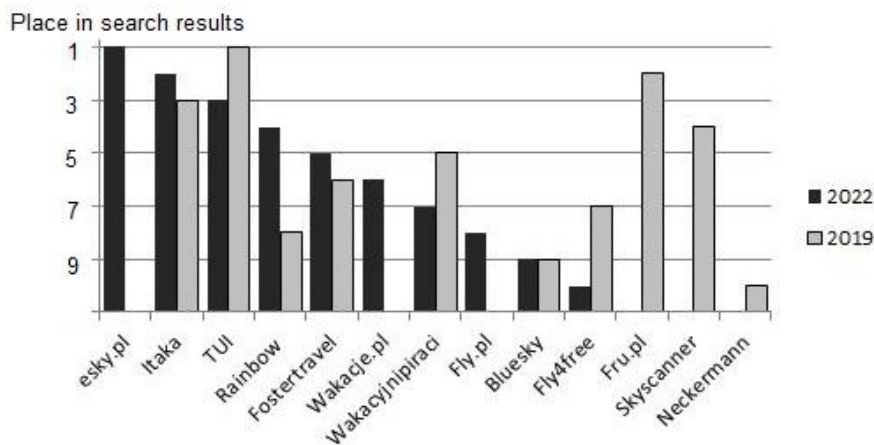


Figure 1 - Positions of Polish OTA in search results in 2019 and 2022. Source: own work



Compared to the pre-pandemic times, the proportion of the types of trips offered under the city break term has not changed significantly. “Classic” packages that combine flight and hotel offer only esky.pl and Bluesky, which by default display options with three and two nights respectively. The editors of Fly4ply.pl portal also treat city break in a classic way, as a flight plus hotel package. The offer of the three largest tour operators looks different, with each of them having a city break product in a different form. In Itaka, city breaks are mostly short (mainly for three nights) air trips to the most attractive cities in Europe, but the packages always include travel guide provided by tour operator and a detailed sightseeing program for each day. Tour dates are also set in advance.

In Rainbow Tours city breaks are offered in the form of short air tours like in Itaka, but the vast majority of offers are bus/coach tours, often being ordinary round trips around a given country (lasting 3-4 nights). TUI, on the other hand, limits its city break offer only to the possibility of buying accommodation for 3, 5 and 7 days in many European cities, but without possibility of buying any transport. Other entities from the analyzed list, i.e. tourist agencies and the Wakacyjnipiraci.pl portal, offer various forms of trips from the tour operators' catalogs under the name of city break, from short air trips from Itaka and Rainbow offers, to regular, often multi-day couch tours, not always related to sightseeing cities.

Compared to the situation on the Polish market, British city break search results differ significantly in terms of the type of travel companies and include 3 groups: travel agencies specialized mainly in flight and hotel packages (lastminute.com, Cassidytravel, Loveholidays, Holidaypirates), airlines (British Airways, easyJet) and tour operators (Thomas Cook, TUI). The first two of the above-mentioned groups occupy key positions in the search results, and compared to 2019, the first two positions are still occupied by lastminute.com and British Airways (fig. 2). The new companies on the list are the dynamically developing Loveholidaystravel agency, and Cassidytravelbudget agency based in Ireland. Superbreak (termination of operations in 2019 [17]), a travel metasearch engine Expedia, and the Dutch airline KLM, fell out of the list compared to the previous analyzed period.

However, the biggest difference between the British and Polish city break market is the type of offer. While Polish companies' city break called offer often included trips that did not have much in common with this term, British companies, without exception, offered classic flight plus hotel packages, with additional, optional extras, such as car rental. The only differences between British companies were the number of nights set by default in their search engines, which ranged from 2 nights (lastminute.com, BritishAirways, easyJet) to 3 nights for the rest of the companies. Only at TUI, the only option was to book a minimum stay of 4 nights.

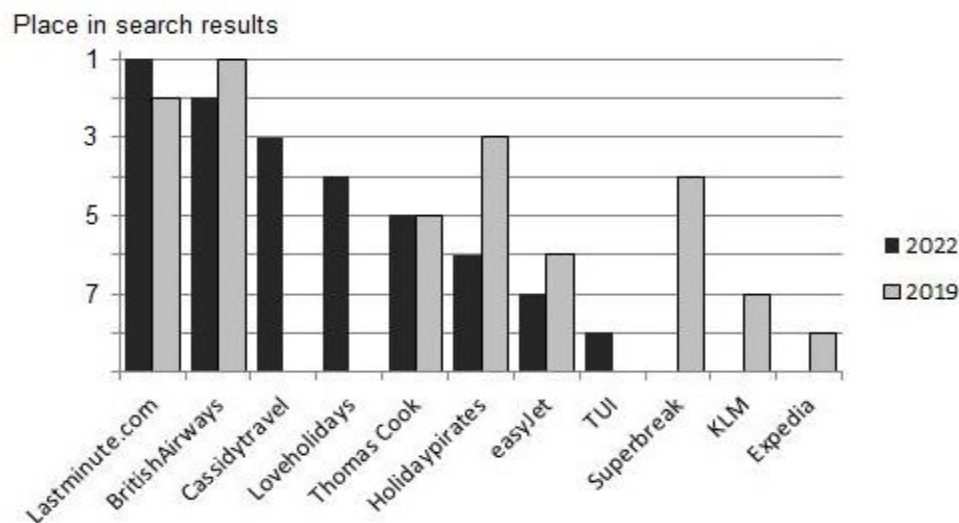


Figure 2 - Positions of British OTA in search results in 2019 and 2022. Source: own work

The list of the most popular city break destinations offered by Polish companies changed in several cases over the analyzed period. There has been a visible decline in the popularity of Barcelona, which was by far the most popular destination in 2019. Similarly, the position of other cities also associated with leisure by the sea, such as Lisbon and Nice, changed (Fig. 3).

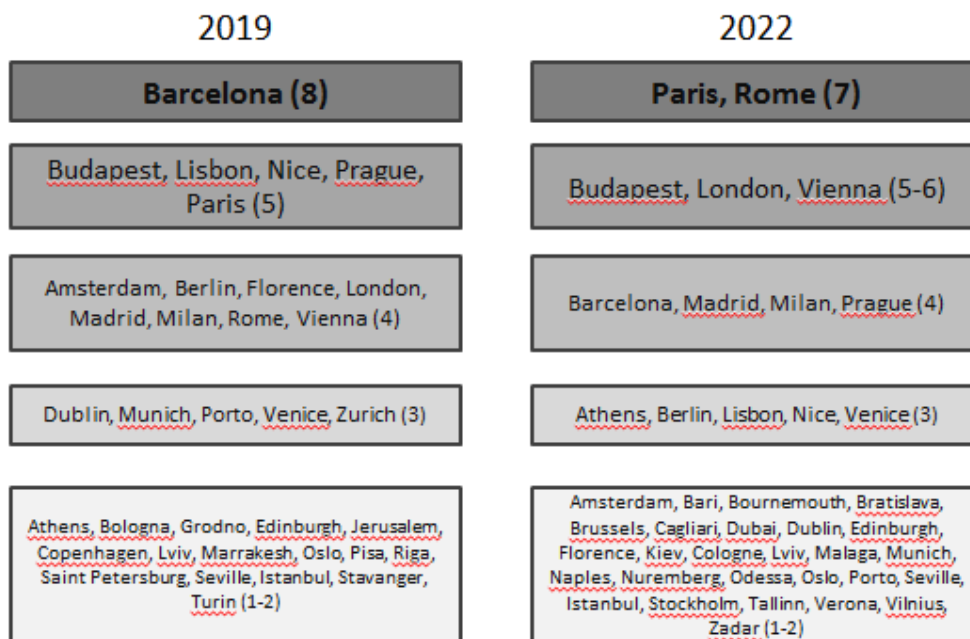


Figure 3 - Changes in the “popularity” of city break destinations offered by Polish OTA in 2019-2022. Source: own work

Offers to some attractive tourist cities such as Florence, Pisa, Turin and Zurich, and some cities from Eastern Europe (Grodno, Saint Petersburg), as well as from more distant destinations (Marrakesh and Jerusalem) were also characterized by a smaller supply. In turn, well known cities like Paris, Rome, and from Central and Eastern Europe (Bratislava, Kiev, Odessa, Tallinn, Vilnius, Zadar), which were missing in the 2019 ranking, have gained popularity, as well as Dubai.

The British city break destination market has hardly changed at all. Apart from the slight decline in Barcelona and the growth of Amsterdam and Rome among the most popular destinations, the only visible changes were a slight decline in the supply of offers to Venice and the rise of Krakow, Paris and Lisbon (Fig. 4). Two processes can also be noted: the emergence of offers for more distant destinations (Marrakech, Dubai, New York, Valetta) and the growing popularity of British cities (London, Edinburgh, Liverpool, Manchester, Belfast).

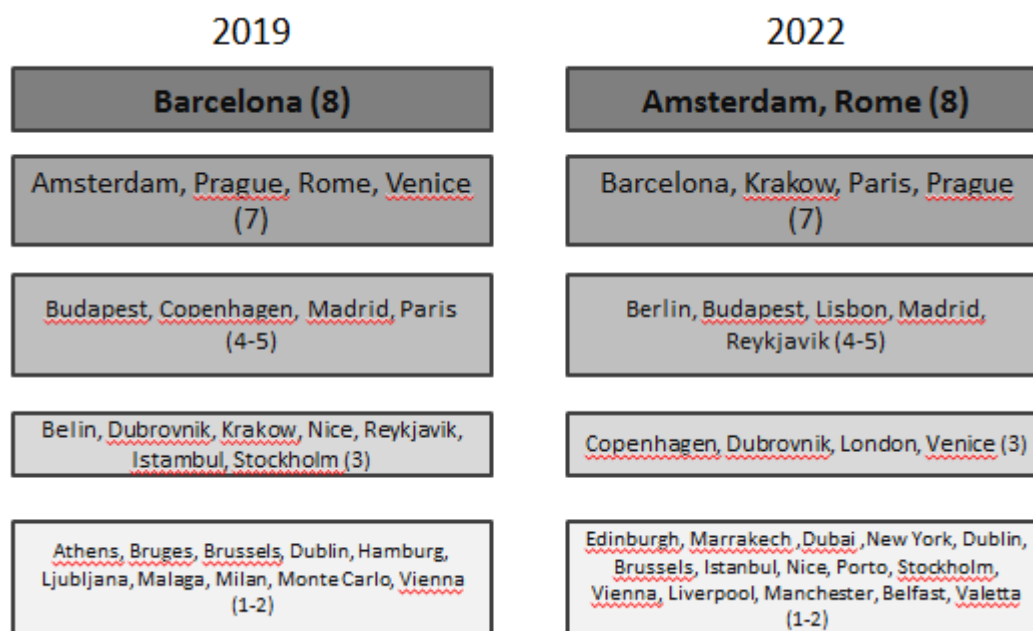


Figure 4 - Changes in the “popularity” of city break destinations offered by British OTA in 2019-2022. Source: own work

The wide offer of city break destinations from different countries in the analyzed offers allows us to conclude that the situation related to the COVID-19 epidemic had little impact on the popularity of the cities. Among the 10 European Union countries with the highest number of COVID-19 cases and deaths (France, Italy, Spain, Germany, Poland [18]), only a few cities showed a small decrease in the supply of offers compared to the pre-pandemic period (e.g. Barcelona, Florence, Munich, Nice, Pisa, Turin, Venice), but this should not be associated with the fear of tourists becoming infected. Evidence of the lack of this correlation is the maintenance of the former position (Madrid, Milan) or the increase in popularity of other cities from these countries, including Bari, Krakow, Naples, Paris, Rome, Berlin and Cologne.

Discussion and conclusions

The first months of the COVID-19 pandemic affected the collapse of the tourist market in 2020, including city break, due to the closure of many air connections and the introduction of strict border crossing regulations. One of the factors that influenced lower tourist traffic was also the fear of contracting COVID-19 in the means of mass transport among some tourists, therefore in 2020 and 2021 there was an increase in domestic tourist traffic and self-organized trips and the decrease of foreign trips in many countries [13]. However, many forecasts for the second half of 2021 and 2022 assume that the tourism sector will be rebuilt to pre-pandemic numbers [19-20]. An optimistic approach can also be seen when looking at the offers of the analyzed companies offering city breaks for 2022. Their wide and diversified catalog of destinations does not differ significantly from that of 2019. Although some cities have slightly lost their popularity the hypothesis about linking this with a pandemic situation in different countries seems unlikely, because the analyzed list includes destinations from all popular tourist countries, including those most struggling with the COVID-19 pandemic.

Larger changes took place in the structure of companies offering city break travel, visible especially on the Polish market where, despite the continued strong position of leading tour operators, the share of online companies focused mainly on intermediation in booking air tickets and selling flight plus hotel packages has increased. The importance of large online travel agencies has also grown in place of metasearch engines. The Polish market, however, still retained its specificity, characterized by (1) the lack of airlines on the market of companies offering city breaks, as well as (2) inconsistent use of the term city break by the largest tour operators, which use it to advertise tours that differ in terms of their program and form from what is adopted in the cradle of the city break, i.e. in the British Isles. The confirmation is seen in differences within the same company, i.e. on the example of British and Polish TUI, where for Polish tourists it is only possible to buy accommodation in city break destinations, without any possibility of transport. Transport to cities and hotels must be organized by tourists themselves. The British branch, on the other hand, offers classic flight plus hotel packages for British travelers.



In conclusion, the changes on the city break market that took place in the last 3 years were not revolutionary, and on the British islands only cosmetic, despite the emergence of the pandemic, which had a strong impact on the general tourist market. On the one hand, this proves the well-established position of this type of travel both on the British and Polish market, even though in the latter city break is often understood in different categories. However, it should be taken into account that the results presented in this article refer only to the highest-positioned companies in search engines, and thus constitute only a preliminary diagnosis of the city break market. Nevertheless, the authors of this article believe that the presented method and the scope of the analyzed data allow for the presentation of the main trends in the research topic.

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Иваницкий Г., Длужевская А.

ПОЛЬША ЖӘНЕ БРИТАНИЯНЫҢ ТУОПЕРАТОРЛАРЫНЫҢ ЖӘНЕ ОНЛАЙН ТУРИСТІК АГЕНТТІКТЕРДІҢ ҰСЫНЫСЫНДАҒЫ ҚАЛАЛЫҚ САЯХАТТАРДЫ САЛЫСТЫРУ

Аңдатпа. Қалаға саяхат нарығының дамуы бюджеттік авиакомпаниялардың дамуымен тығыз байланысты, олардың тығыз байланыс желісі бірнеше жылдар бойы Еуропаның барлық ірі қалаларына салыстырмалы түрде арзан бағамен ұшуға мүмкіндік берді. Осындай оңай қол жетімділікті қолдана отырып, туристік агенттіктердің көпшілігі "қалалық демалыс" терминімен жарнамаланатын сапарларды ұсынады. Алайда, соңғы жылдары бұл қызықты термин бірнеше қалаларда, көбінесе еуропалық астаналарда классикалық сапарларды сипаттау үшін жиі қолданылды, демек олардың бағыттары әрдайым осы салыстырмалы түрде жаңа саяхат формасын анықтауға сәйкес келмеді. Бұл тәжірибені туристік агенттіктер әлі күнге дейін қолдана ма? Осы мақаланың мақсаты-таңдалған еуропалық туоператорлар мен туристік агенттіктер ұсынатын 2022 жылға арналған қалалық демалыс бағыттарын талдаудан бұрын осы сұраққа жауап беру. Қосымша мақсат-covid-19 пандемиясында болған қалаларда демалудың ең танымал бағыттарының нарықтағы өзгеруін зерттеу.

Кілт сөздер: қалалық демалыс; Демалыс күнгі сапарлар; қалалық туризм; туоператорлар; туристік агенттіктер.

Иваницкий Г., Длужевская А.

СРАВНЕНИЕ ПОЕЗДОК НА ОТДЫХ В ГОРОДЕ В ПРЕДЛОЖЕНИИ ПОЛЬСКИХ И БРИТАНСКИХ ТУРОПЕРАТОРОВ И ОНЛАЙН-ТУРИСТИЧЕСКИХ АГЕНТСТВ

Аннотация. Развитие рынка путешествий в город практически неразрывно связано с развитием бюджетных авиакомпаний, чья плотная сеть стыковок в течение нескольких лет делала возможными полеты практически во все крупные европейские города по относительно низким ценам. Пользуясь такой легкой доступностью, большинство туристических агентств предлагают поездки, рекламируемые под термином "городской отдых". Однако в последние годы этот броский термин часто использовался для описания также классических поездок туда и обратно в нескольких городах, чаще всего в европейских столицах, что означало, что их маршруты не всегда вписывались в определение этой относительно новой формы путешествий. Используется ли такая практика туристическими агентствами до сих пор? Цель этой статьи - ответить на этот вопрос, которому предшествует анализ маршрутов отдыха в городе на 2022 год, предлагаемых избранными европейскими туоператорами и туристическими агентствами. Дополнительной целью является изучение изменений на рынке наиболее популярных направлений для отдыха в городах, которые произошли во время пандемии COVID-19.

Ключевые слова: городской отдых; поездки выходного дня; городской туризм; туоператоры; туристические агентства.