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Determinants and prospects for the development of the Polish yacht industry

Abstract: The growing position of the Polish yacht industry in international markets is the result of many years of innovative activity by enterprises in terms of product, process, organisation and marketing. The competitive advantage achieved has led to a gradual increase in domestic production, in the number of entities involved in construction, as well as in the production and sales of yachting equipment. The following study aims to define the determinants and prospects for the development of the Polish yacht industry against a background of market processes and socio-cultural phenomena. With further exploitation of the market niche, Polish producers can be competitive in international markets thanks to material, technology, design, project, organisation and marketing innovativeness. Having good brands, no need for relocation of production, a favourable price-quality ratio, but above all, the quality and quantity of the products allow for optimism concerning the production and sales of yachts in the future. It is also indicated by demand, including an increasing domestic component which significantly exceeds supply. Its fundamental determinant is the growing wealth level and the fashion for spending free time on the water, and this includes the fashion for water houses.

Keywords: development trends; innovation; SWOT analysis; yacht industry

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INTRODUCTION

An attempt to describe the functioning of the Polish yacht industry seems to be an incredibly complex task, not only due to formal conditions but also the complex socio-economic context of the sources of its development and market success. The very use of the term ‘yacht industry’ is today a result of cultural rather than technical or functional reasons, as the commonly used terminology leaves a wide margin for interpretation. It applies, for example, to the use of the terms ‘motor yacht’ and ‘motorboat’. According to the Polish Register of Shipping (PRS, *Polski Rejestr Statków S.A.*), the main factor that

distinguishes a motor yacht from a motorboat is the intended use. However, the explanation states that motor yachts are used only for sport and/or tourist purposes, and motorboats are just used for sport and recreation, although their purpose is broader. It does not dispel doubts, just as PRS uses the term 'yacht' only for sea-going versions (Register of Sea Yachts, 2017), calling all the others boats¹ (Register of Motorboats, 2017). It should also be added that in the current system under the Polish Classification of Economic Activities (PKD), the term 'yacht' does not appear at all².

This ambiguity requires a much broader reflection on the phenomenon of owning/using a yacht, a reflection of particular interest on the cultural plane where a yacht is perceived as a manifestation of luxury, which by definition means a high price and high quality, rarity, originality and luxury (Kapferer, 1997). It should be emphasised that in Polish society³ the importance of the cultural plane in purchasing decisions, especially luxury goods, is growing because their possession evokes widespread, at least officially, expressed admiration and respect (Bochańczyk-Kupka, 2014). On the other hand, financial barriers, although they are still the primary demand determinant on the yacht market, are losing their importance from year to year due to growing wealth. In Poland, in less than ten years (2011–2018) the number of rich and very rich people⁴ doubled from 522 000 up to 983 000. Thus, the number of potential yacht buyers has doubled. However, this is still a minimal number compared to citizens of more developed countries. In 2018, in the United Kingdom, France and Germany, the number of HNWI⁵ amounted to over 2 million, while in Poland, it was only 62 000 (KPMG, 2018). It is equally important that the wealth of Poles has a significant spatial differentiation, and this translates into yacht ownership and marketing activity related to the yacht market.

However, the growing production of the Polish yacht industry is not only the result of growing demand but is also a consequence of expanding the offer to products with broader availability. It means maintaining production of so-called extreme luxury (unique, individual vessels) and luxury (limited series production), with the simultaneous launches of products of so-called affordable luxury (standardised products of very high quality) which are aimed mainly at a much larger group of people aspiring to become rich. This process is facilitated by marketing campaigns targeted at specific groups and much more extensive distribution channels.

For the functioning of the yacht industry, including Poland, a growing interest in tourism on water is also essential. For many years, the attractiveness of water recreation has been rated very highly. However, now, due to the increase in wealth and much

¹ Official website of PRS S.A. <https://www.prs.pl/wydawnictwa/rejstry-statkow-jachtow-lodz>. Accessed on 01.01. 2020.

² PKD (Polish register of economic activities) does not include the terms 'yacht', 'yacht production', etc., and the entire discussed production activity is included under subclass 30.12 Z – production of pleasure and sports boats. This subclass includes many more activities than those related to the production of yachts, but yacht production is most often considered to be the production of sailing boats, including those with an engine, and the production of motorboats. The lists of the International Council of Marine Industry Associations ICOMIA also distinguish the group of the so-called 'other boats', including outboard motorboats.

³ Consumers may have different perceptions of luxury goods due to different interactions between individuals in a given society. In some societies, displaying glamour is respected, and in others, it produces negative judgments (Vigneron, Johnson 1999).

⁴ According to KPMG (2018), rich people are those with a monthly income of over PLN 20 000 gross and very rich people – more than PLN 50 000 gross. Note: the terms 'rich' and 'very rich' refer only to the achieved monthly gross income and are not the same as the value of property owned by such people.

⁵ HNWI, or high net worth individuals, are a group of the richest people in a given country whose net assets (including real estate net of debts) exceed USD 1 million.

more free time, it can be concluded that yacht tourism and recreation are experiencing a renaissance by developing existing or promoting new forms, including living on the water.

In light of the above premises, the research aims to characterise the functioning of the Polish yacht industry in a cross-sectional study with a particular emphasis on production⁶. An attempt is also made to interpret development trends in the Polish yacht industry against selected countries. The determinants of the success of the Polish yacht industry are identified using a SWOT analysis.

PRODUCTION OF THE YACHT INDUSTRY IN POLAND

Referring to data from the International Council of Marine Industry Associations ICOMIA, in 2017 Poland produced 21 915 vessels considered as yachts, 68% of which were small motorboats with outboard motors, the length of which did not exceed 7,5 m. The most important, however, is the presence of products from Polish yacht shipyards in most market segments, including those associated with extreme luxury. Polish shipyards are also recognisable as producers of large luxury motor yachts and personalised catamarans (Table 1).

Table 1. Production structure of the yacht industry in Poland in 2017

Specification	Sailing yachts	Motorboats (inboard)	Motorboats (outboard)
TOTAL	1 419	543	19 750
by hull length (LOA – length overall)			
2.5–7.5 m	1 205	255	14 900
7.6–12.0 m	204	240	4 800
12.1–24.0 m	8	48	50
over 24.0 m	2	–	–

Source: ICOMIA 2018

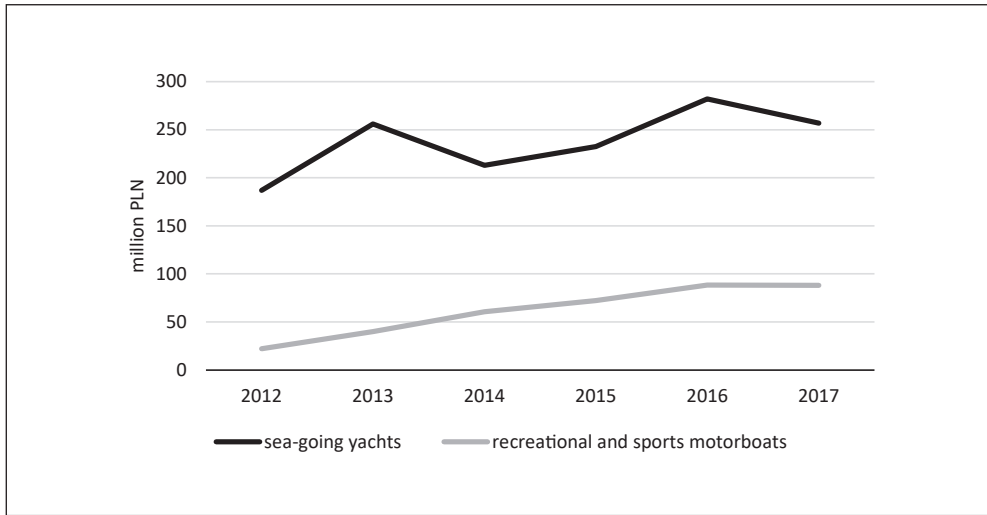
Production figures are not the result of single-year market success of Polish enterprises, but a moderate albeit constant upward trend that has been maintained for several years and is visible in every segment (Figure 1). Therefore, in an optimistic scenario, assuming favourable conditions, it can be concluded that the situation in the Polish yacht industry is good, and it does not raise concerns in the short term.

The domestic yacht market, which has been experiencing a revival for several years, is still not large and rich enough to become the primary recipient of Polish production. Hence most of the yachts go to foreign markets. In 2017, 14 726 were exported, most of which, 83,2%, were small motor yachts. Their value, which amounted to EUR 361,3 million, was the main component of Polish yacht industry exports (Figure 2).

For both kinds of motorboats, exports exceed imports, demonstrating the export orientation of yacht production. For sailing yachts, the situation is different as imports expressed in the number of vessels exceeds exports. It is due to the commercial activity of Polish importers on the international secondary market. Imported vessels, unlike

⁶ Due to insufficient data, the dynamic approach was abandoned. Most of the findings are based on data from 2017.

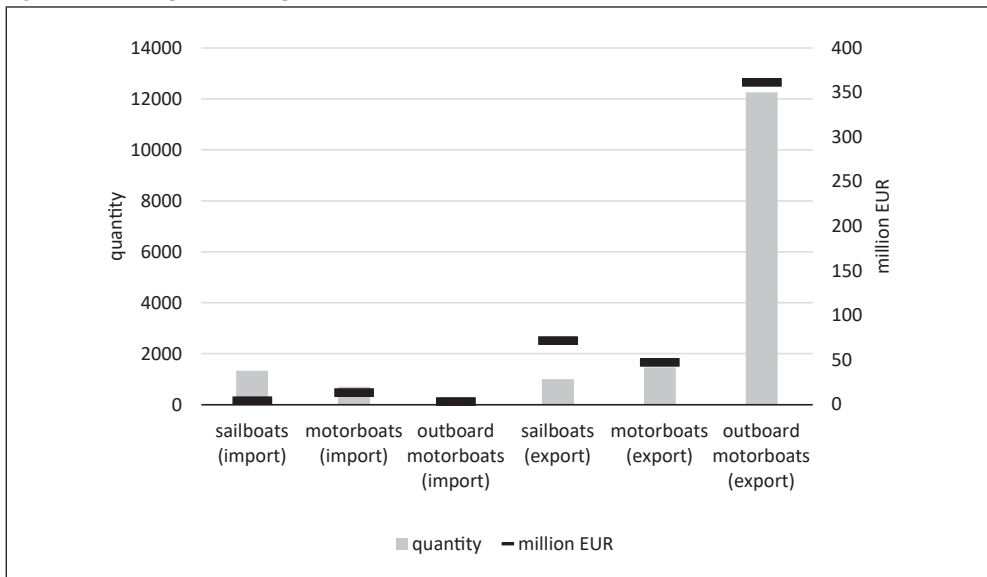
Figure 1. Sales value* of sea-going yachts as well as recreational and sports motorboats in Poland



*Data concerns economic entities with more than nine employees

Source: Rocznik Statystyczny Gospodarki Morskiej... (2014–2018)

Figure 2. Yacht imports and exports in Poland: 2017



Source: ICOMIA 2018

exported ones, have had previous owners and show high variability in terms of wear and its extent. The relatively low value of imports confirms it in this segment. It is worth adding, however, that despite the clear advantage in the production and sale of motor yachts in Poland, most domestic vessels are sailing yachts, which is the result of several decades of sailing tradition, and at the same time the still relatively weak purchasing power of potential boat owners (Table 2).

Table 2. Number of vessels in Poland in 2017

Type of vessels	Number of vessels	Share
sailing boats	71149	92.0
motorboats	156	0.2
other boats	3 197	4.1
pontoons	1 605	2.1
jet skis	1 257	1.6
TOTAL	77 364	100.0

Source: ICOMIA 2018

Due to the lack of domestic production, Polish yachts are supplied with motors depending not only on technical requirements but also the tastes or capabilities of the customer/buyer. Hence, the relatively large scale of imports of engines of various propulsion categories, reaching several thousand a year, especially outboard motors. For yacht accessories, the situation is entirely different and Polish companies cover a part of the market's needs. Imports cover existing shortages, but in some segments, this is apparent because of fashion, tastes or stereotypes, vital in the case of luxury products. Polish producers of yacht equipment are also valued suppliers of parts for foreign producers. The export scale of yacht accessories in 2017 amounted to EUR 44 million. However, there are still unbranded deliveries abroad which, apart from the immediate profit of producers, should be treated as unfavourable.

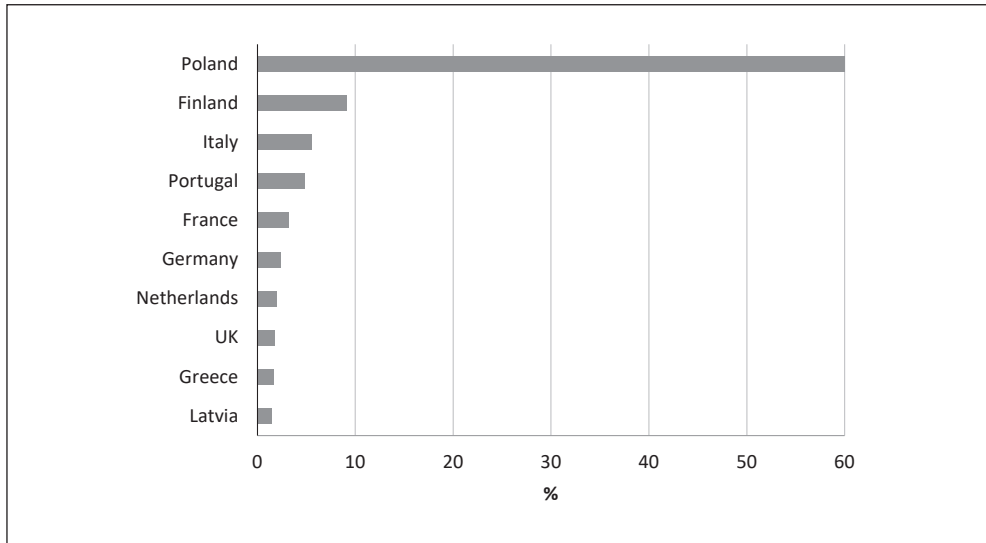
As already mentioned, most yachts manufactured in Poland go to foreign markets. In 2018, their value accounted for 60% of the total value of EU yacht exports, and in the period 2014–2018, it doubled from EUR 184,8 million to EUR 395,8 million (PIE, 2019). It is worth noting that the value of Polish yacht exports accounts for approximately 0.19% of the total value of Polish exports. It is one of the few Polish industries in which many companies are producers of international luxury brands which, apart from the economic dimension, also has a socio-cultural significance, although this is not so widely known (Figure 3).

The main directions of exports for the Polish yacht industry refer to traditional markets, commonly including the following:

- Western Europe (the main export direction of Polish shipyards; the main target countries are Norway, France and Germany – the value of sales to these three countries only is over EUR 160 million),
- North America (an important export destination for Polish shipyards; exports mainly to the United States of America),
- Australia and New Zealand,
- Japan.

On these markets, Polish products are recognisable, and Polish producers can be competitive thanks to innovative materials, technology, design, organisation and marketing. A favourable price-quality ratio is also essential. Besides these, the so-called developing markets, which include Russia, Brazil and South Africa as well as the Persian Gulf states, are also perceived as significant. These markets are already there, and soon, they will become the main target of marketing activities. On the other hand, the remaining South American countries, India and the countries of Southeast Asia can be considered prospective markets in the longer term.

Figure 3. Yacht exports in the European Union by selected countries in 2018



Source: PIE (2019)

At the end of 2017, there were 105 shipyards in Poland, employing a total of about 42 000 (ICOMIA, 2018). These were both manufacturers selling yachts under their brand and companies manufacturing them to order by foreign shipyards, e.g. American, French or Scandinavian. This division is essential when considering the scale of the market success of Polish products, and indirectly influences the promotion of their brands. Also, in 2017, there were 89 enterprises producing yacht fittings and equipment in Poland, employing 5500 people. However, the size of the entire industry is estimated at around 1000 enterprises, which includes a large group of component suppliers, equipment wholesalers and entities selling yachts from foreign producers. There is a concentration of companies in the voivodeships of northern Poland (Zachodniopomorskie, Pomorskie, Warmińsko-Mazurskie, Podlaskie). Their position determined not only by the naturally strong boatbuilding traditions of Ostróda, Augustów, Chojnice, Gdańsk and Szczecin but also accessibility because the size of the yachts produced is primarily limited by their dimensions, mainly a width up to 3 m, which allows them to be transported without significant difficulties all over Europe on specially adapted vehicles with trailers (Centkowski, 2014). Transport accessibility is also closely related to the accessibility to suppliers, labour resources, and business environment entities, which in the case of yacht industry enterprises are mostly located away from large agglomerations (or on their periphery) and this is of crucial importance to their further operation. Hence the observed location pattern where Polish yacht shipyards operate near important roads of at least national importance.

The largest yacht shipyards employing from 500 to 1500 people include Ostróda Yacht, Model Art from Ostróda, MPPB J.W. Ślępsk from Augustów, HTEP Polska from Gdańsk, Delphia Yachts Kot from Olecko, and Galeon from Straszyn near Gdańsk (Wasilewski, 2018). However, smaller yacht shipyards and other companies are located throughout the country. The distribution of the Polish yacht industry allows for a transformation of passion and boatbuilding traditions into a modern sector functioning as

a non-metropolitan, dispersed cluster of medium and high technology industries. Its functioning is based on individualised projects, high production flexibility and research that sets global development trends, provided that the cluster is fully aware of them.

TRENDS IN THE POLISH YACHT INDUSTRY COMPARED TO SELECTED COUNTRIES

Based on trends in the global recreational boat industry in 2018 (ICOMIA, 2018: 44–45), two for Polish yachting were distinguished. Both are presented in graphic form and analysed below.

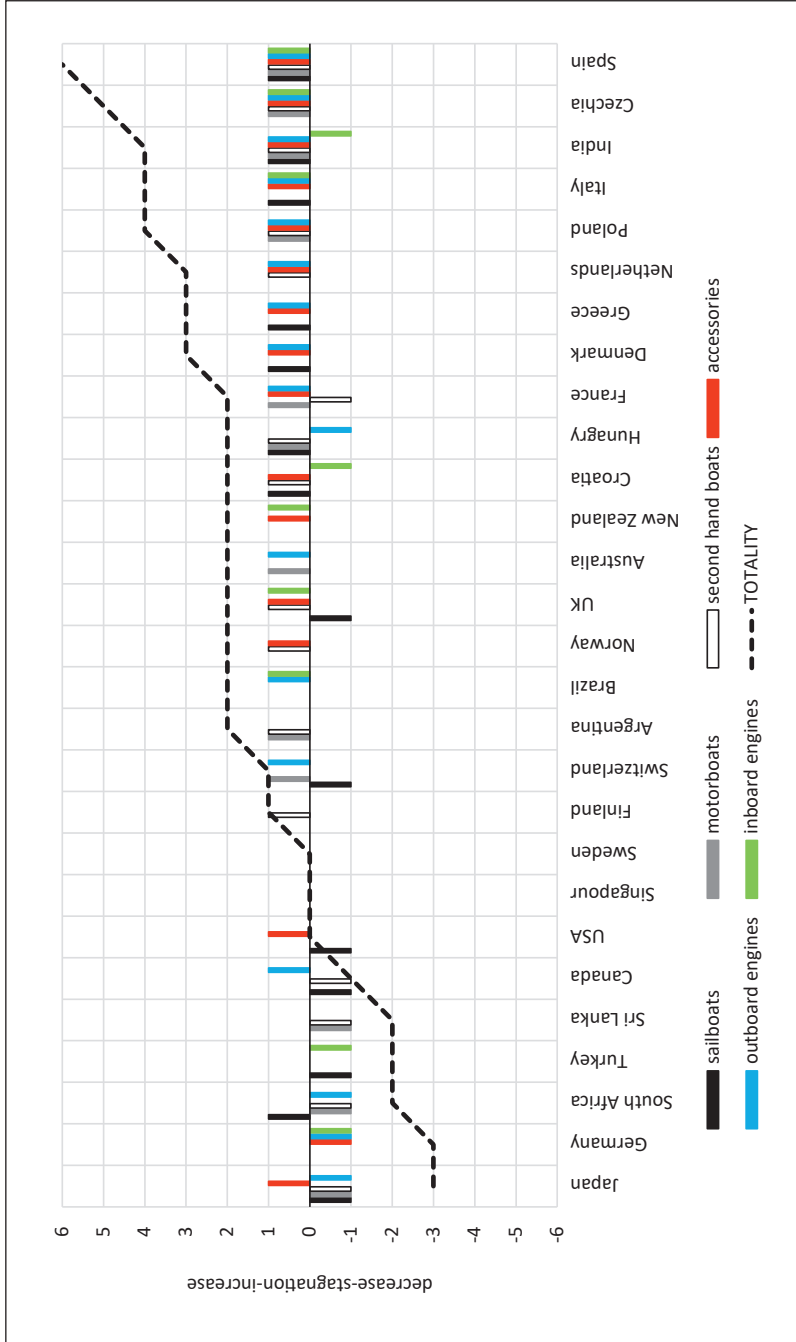
The first concerns trends based on sales revenues in the first two quarters of 2018 for six selected market segments (Figure 4). As these result from analysing market segments included in sales revenues, further growth is expected in four of them. They currently include the essential segment of the Polish yacht industry, i.e. motorboats with that of outboard motors closely related to it, which should be viewed as an assembly process. This group also includes the production of yacht accessories and equipment whose success is related to the growing domestic production of boats, and also the supply of accessories for foreign customers. The fourth market segment for which an upward trend was identified is the second-hand boat market. It means that the development of the domestic yacht market is expected but mainly based on the secondary market. The observed increase in the wealth of Poles as the leading force for demand should translate into more significant interest in the purchase of yachts, but it is not yet large enough to consider new vessels in most cases. The development of the domestic market for used yachts may contribute to an increase in demand for new ones, especially among the wealthiest people who will be able to replace used with new; but in the long term, the secondary boat market may become a threat to domestic production, especially with the uncontrolled import of vessels.

Experts assume stagnation in the case of two market segments, i.e. sailing yachts and inboard engines. In the case of sailing yachts, it is an expression of a global trend that means a decline in the popularity of sailing as it requires considerable skill and high physical fitness, and is much more dependent on hydrometeorological conditions. However, this does not mean that this form of yachting has been entirely ruled out, but that it should be directed more towards sport or education. When it comes to classic inboard motors, stagnation results from a specificity which manifests itself in relatively high costs of purchase, operation and possible replacement. Furthermore, these engines show low flexibility of use as they are usually dedicated to a specific boat. Another issue is lack of compactness as they take up much space, which in the case of small and even medium-sized vessels is not without significance. It is also worth adding that for ecological reasons, electric motors are increasingly used, and offered in a wide selection.

Poland's national yacht industry is among the leaders. It follows the countries of Mediterranean Europe (Spain, Italy and France, followed by Greece and Croatia), which are traditional and recognised places of yacht production, as well as Central European countries (apart from Poland, Czechia and Hungary) which so far due to locations less associated with yacht production can be considered developing markets.

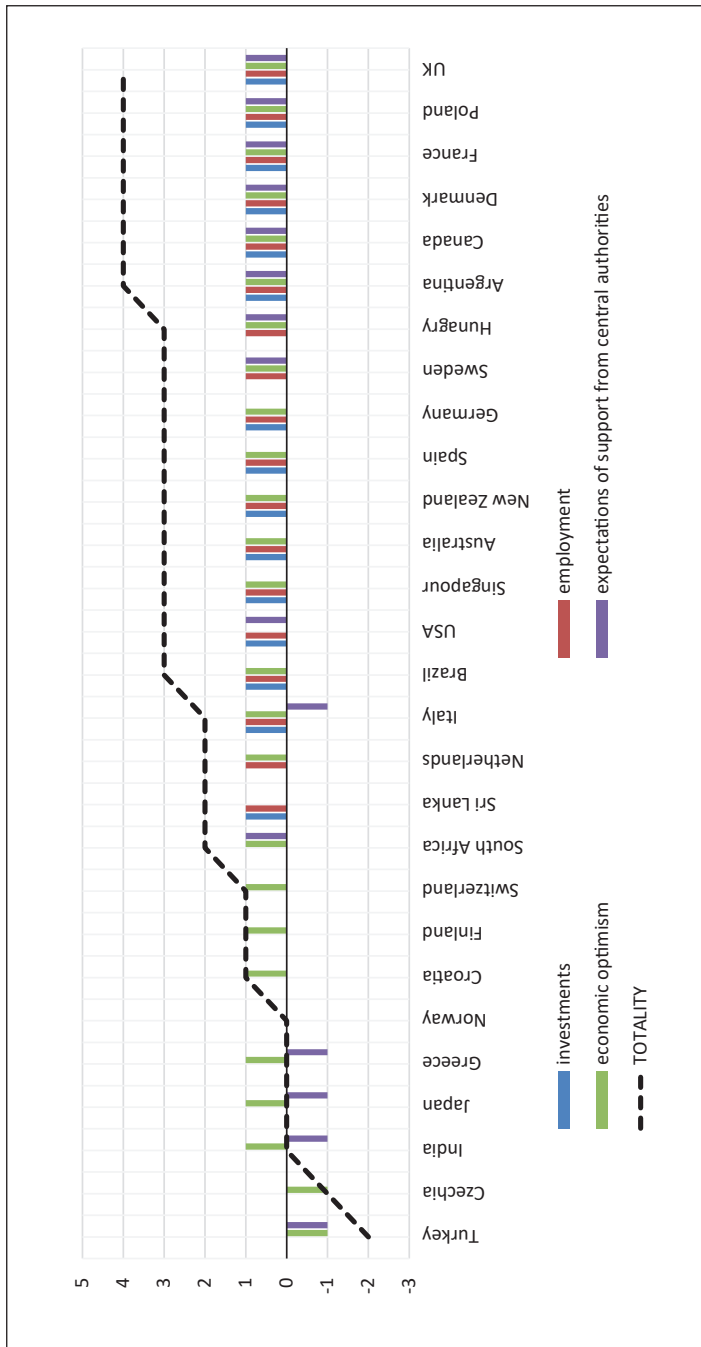
In the case of many other countries, including Nordic ones, prospects for the development of the yacht industry are much smaller, and experts predict upward trends in only a few market segments. However, this may not be entirely due to the collapse of

Figure 4. Sales trends in the Polish yacht industry compared to selected countries of the world (based on sales revenues in the first two quarters of 2018)



Source: the graph based on ICOMIA data (2018)

Figure 5. Trends in the Polish yacht industry compared to selected countries of the world in terms of corporate policy (based on the size of investments and employment declared by enterprises and the assessment of economic prospects and expectations from government in 2018)



Source: the graph based on ICOMIA data (2018)

the yacht industry. The reason could be the gradual reduction of domestic production and the outsourcing of all or part of the production to other countries.

The second group of trends analysed is based on the size of investment and employment declared by enterprises and the declared assessment of economic prospects and expectations by the government in 2018. Taking into account selected socio-economic elements from the entire yacht industry, Poland is one of those countries where an increase is expected in investment and employment resulting from the growth of economic optimism among the owners and management of yachting enterprises (Figure 5).

According to the declarations of Polish yacht industry enterprises, their expectations regarding support from government will increase soon. It is worth adding that Polish yacht industry companies, despite their excellent reputation, do not yet have such a strong national brand as French, British, Italian and American companies. Therefore, they need much more activity in the field of product and area marketing. However, the Polish yacht industry, apart from the promotional support it receives, including foreign promotion, also needs more effective support in educating new staff because of the problem of a shortage of employees and the question of increasing their qualifications is being raised more and more often. It requires not only systemic and capital solutions, but above all, more effective shaping of entrepreneurial attitudes, especially among those entering the labour market, not without significance in shaping an innovative economy.

CONDITIONS FOR THE MARKET SUCCESS OF THE POLISH YACHT INDUSTRY

In the process of identifying the determinants of the success of the Polish yacht industry, the starting point was the opinion of Ziolo (2009: 11) who believes that “a significant role in the process of shaping the modern industry is played by the created, developed and implemented innovations, which can be created by a suitably prepared person equipped with specific knowledge resources and the ability to use them. The combination of these features will increasingly affect the growing competitive advantage of companies, regions and countries”. Emphasising the importance of the human factor and its ability to create a market in a geographically defined place is crucial for understanding the construction of the current competitive advantages of the Polish yacht industry. The spatial aspect should be stressed, and is indeed pointed out by many authors, e.g. Janasz (2012: 743) who claims that “...economic and civilisation success will be achieved by those communities, countries, regions and enterprises that develop and liberate the ability to generate creativity and innovation (creative knowledge, intellectual capital)”. The above quotations lead to the conclusion that not all communities, countries or regions will achieve socio-economic success, but rather those that can attract appropriately competent labour resources capable of using their knowledge and skills to generate creativity and innovation. It is worth remembering that human resources are now mobile as never before (real and virtual), therefore it is desirable not only to select the best individuals but also to maintain them. Recruitment on a local or even regional scale, initially effective over time, may turn out to be insufficient not only for purely substantive reasons but also for demographic, economic and socio-cultural reasons. Today, the Polish yacht industry faces such dilemmas, for which *people* seem to be the most crucial strength that determines all the others (Table 3).

Determinants and prospects for the development of the Polish yacht industry 19

Table 3. SWOT analysis for the Polish yacht industry

Weight	Strengths	Weight	Weaknesses
0.4	Human capital (<i>knowledge, experience, relatively low costs, openness to cooperation</i>)	0.3	High costs (<i>of constructing, designing, producing, marketing etc.</i>)
0.15	Yacht design (<i>individualised, innovative</i>)	0.2	Small and medium companies dominate
0.15	Technology (<i>modern, seeking new solutions such as fully automated yachts, using graphene, own R&D departments</i>)	0.2	Limited transport availability affecting the size of production, speed and safety of transport
0.15	Production (<i>precision, keeping deadlines, national, cooperation, attractive price</i>)	0.2	Spatially distributed production and completion
0.15	Products (<i>good reputation, wide offer, personalisation</i>)	0.1	Production of semi-finished products e.g. hulls for other manufacturers without brand marks
Weight	Opportunities	Weight	Threats
0.4	Increase in the wealth of societies	0.4	Sensitivity to economic crisis
0.3	Fashion for water recreation	0.2	Big competition
0.1	Technological progress	0.2	Rising labor costs
0.1	Growing interest and support from institutions and authorities	0.1	Weakness of the domestic market
0.1	Growing investments in waterways and port infrastructure	0.1	Growing ecological requirements in production (e.g. the problem of styrene)

Source: author

The growing position of the Polish yacht industry on international markets is the result of many years of innovative product, process, organisation and marketing activities of enterprises. The competitive advantage the industry has achieved in this way has resulted in a gradual increase in domestic production, the number of companies involved in the construction of vessels as well as the production and sale of yacht accessories. However, the innovative strategies adopted in the majority of yacht industry companies require significant expenditure, which, given the high sensitivity of the activity to the economic crisis, may prove to be a difficult task to implement without, for example, support from the government. The question of what support is allowed, i.e. compatible with the common EU market, remains an open question. It is also worth taking into account the consolidation process that is carried out in other industrial departments, e.g. in Polish fish processing (Czapliński, 2018). Its effects could mitigate most of the weaknesses.

As already mentioned, the wealth of societies, including Poland, is growing, which theoretically widens the circle of people interested in buying yachts. The growing fashion for water tourism also strengthens it for which new locations are being opened. Nevertheless, it is worth remembering that yachts are luxury goods, the sale of which is sensitive to economic shocks and for which new ideas are expected all the time. With strong competition on foreign markets, a still weak domestic market and relatively weak national brand, although already existing, it seems to be a difficult task.

SUMMARY AND CONCLUSIONS

The results of the author's SWOT analysis (presented above) based on research into the functioning of many companies, allow for a definition of a strategic position, and, consequently, for the type of primary strategy needed for the entire Polish yacht industry. This strategy is an aggressive one (maxi-maxi), in which, thanks to the many strengths, opportunities should be taken up, mainly through strong market expansion and attempts to achieve diversified development. The research carried out allows such a generalisation even though there are no top-down findings at the level of the industry. The similarity of the functioning of enterprises at a strategic level should instead be associated with the deliberate or unintended process of learning from the better, more successful ones on the market, and with the scale of active and passive links that determine the functioning of, primarily, smaller economic entities.

The following facts confirm the defined, common strategy:

- companies in the yacht industry, from all their strengths, and especially human resources, should take advantage of opportunities in the business environment (using the synergy effect) which has resulted in a steady market expansion (mainly in foreign markets)
- the rapidly growing market allows for further investments in new products (e.g. work on autonomous yachts) and new market segments, e.g. water houses
- the concentration of resources still concerns the most competitive products, i.e. “small motor yachts” (6–9 meters)
- enterprises compete with each other, mainly on foreign markets, but at the same time cooperate in those areas where it is possible to release synergistic effects of joint actions (e.g. marketing activities, policy towards state authorities).

The critical question is how long the Polish yacht industry will remain on an upward trend. The answer to this question is very complex and mainly results from the conditions presented above. However, it is worth paying attention to one more aspect: changing the paradigm of industrial development. The foundations were defined after the recent global financial crisis (Poniatowska-Jaksch, 2015 after Jung-Woo, Deuk-Kyu, Young-Il, 2010) and are now strengthened in the context of ongoing climate change. According to these authors, the period of mass production based on increasing energy consumption is a thing of the past and is being replaced by indicators of industrial development such as ecology, convergence (intelligent functions) and protection. Whether and how, and above all, when, it will affect the Polish yacht industry, remains unknown, but it is worth considering this element in creating long-term strategies. It is also a challenge for further research.

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Determinants and prospects for the development of the Polish yacht industry 21

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