

CROSS-BORDER ACTIVITY OF RESIDENTS OF BORDER REGIONS IN THE EUROPEAN UNION (A CASE STUDY OF LITHUANIANS IN THE POLISH BORDER MARKET)

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ABSTRACT

Aim: The study analyzes the cross-border activity of Lithuanians in the Polish border market and the socio-demographic factors determining such activity. **Methods:** A total of 328 respondents participated in interviews conducted from December 2022 to January 2023. Non-parametric tests were used to analyze the data. The research questions included in this study are as follows – Q_1 : What are the preferred areas of cross-border activity of Lithuanian residents in the Polish border market?; Q_2 : What socio-demographic factors determine the cross-border activity of Lithuanian residents in the Polish border market? **Results:** The results show that the respondents were most active in border trade, tourism, and social relations between regional residents. Age, place of residence, and household size had no significant effect on any of the analyzed areas of cross-border activity of Lithuanians in the Polish border market. Education, professional status, and monthly income had a statistically significant effect on cross-border trade activity, while tourism was significantly statistically affected by gender and education. **Conclusions:** Cross-border activity fosters the development of border trade and tourism, as well as the creation of links between local communities living in border areas that strengthen neighborly relations. Border trade should encourage entrepreneurs to seek innovative and socially responsible practices that support the sustainable economic development of a country or region. The study provides evidence in the context of realizing cross-border activity that supports residents of border regions in adapting to dynamically changing geopolitical conditions.

Keywords: cross-border activity, border market, border trade, tourism

JEL codes: E31, F14, F20

INTRODUCTION

The transformation of the political system that took place in the Eastern Bloc countries made it possible to introduce changes and new levels of cooperation. Cross-border activities transcend the borders of sovereign states, which implies the need to overcome multiple barriers. Barriers can be understood in historical,

legal, economic, commercial, or social terms. They can and often do include mental barriers. Cross-border cooperation leads to the obliteration of mutual animosities and builds trust in many areas of economic and social life. Cross-border cooperation depends on many factors, which include, among others, the unstable geopolitical situation in the world, political decisions of individual countries, legal and non-legal regulations,

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price differences, dynamic exchange rate fluctuations, and many others.

Over the years, the principles, forms, and directions of development of Polish-Lithuanian cross-border cooperation have undergone significant changes. In the initial phase of the establishment of partnership relations between neighboring countries, it was implemented mainly in the political and social dimensions. In subsequent phases, its other benefits were recognized, in particular, economic benefits. However, regardless of the organizational form, the most important arguments for the development of cross-border cooperation include historical, political, economic, and social reasons. The development of good neighborly relations and the strengthening of European integration processes are fostered by the mutual relations of Polish and Lithuanian border regions. These regions are a key partner not only for EU and European institutions, but also offer opportunities for the development of cross-border activities of border region residents in various spheres of economic and social life.

Border regions are areas of individual specificity and unique areas due to their proximity to the state border [Hardi 2010]. Despite their proximity and similar historical and social structures, Poland and Lithuania differ significantly in many areas of economic and social life. This rationale implies changes in cross-border activity in all areas of economic and social life. Therefore, this article contributes to the previous achievements of other researchers and provides knowledge about the areas of cross-border activity of Lithuanian residents in the Polish border market.

In view of the membership of Poland and Lithuania in the European Union and the lack of formal borders between the countries, it was hypothesized that the cross-border activity of Lithuanian residents in the Polish border market is dependent on economic factors and, to the greatest extent, is realized in border trade. Taking this into account, the purpose of the study is to determine the cross-border activity of residents of border regions, using the example of the activity of Lithuanians in the Polish border market and the socio-demographic factors determining such activity.

MATERIAL AND METHODS

The survey was conducted in Lithuania and Poland from September to December 2022. The survey sample consisted of 328 respondents. Interviews were conducted in four Lithuanian border cities (Kaunas, Vilnius, Alytus, Druskininkai) and four Polish border cities (Augustow, Bialystok, Suwalki, Elk). The criteria for selecting cities for the study were: distance to the Lithuanian-Polish border (a distance of less than 200 kilometers), population (more than 30,000 inhabitants), and attractiveness of the tourist offer of the studied areas. Probabilistic selection was used, using the methodology of geographical area sampling in selected cities.

The interview questionnaire was in Lithuanian. The research questions included in this study are as follows:

Q₁: What are the preferred areas of cross-border activity of Lithuanian residents in the Polish border market?

Q₂: What socio-demographic factors determine the cross-border activity of Lithuanian residents in the Polish border market?

To eliminate any possible confusion in the questions, pilot testing was conducted on a sample of 17 Lithuanians. After the piloting, a research tool – an interview questionnaire – was created. The measuring scale in the questionnaire was a Likert scale from 1 to 5. The result was further analyzed using descriptive analysis to measure respondents' characteristics and the cross-border activity of Lithuanian residents in the Polish border market. Socio-demographic factors include 7 characteristics: gender, age, education level, place of residence, number of family members, occupational status, and monthly income per household member.

The study used non-parametric tests, mainly due to nominal and ordinal measurements. In particular, the Mann-Whitney U test was used for dichotomous categorical variables as independent variables (e.g., gender, female = 1 or male = 0), and the Kruskal-Wallis test was used for multiple-choice responses as independent variables (e.g., education, occupational status, and others). The non-parametric χ^2 Pearson test was used to examine the statistical significance of differences. In addition, statistical significance was set at a *p*-value of 0.05 and a very significant *p*-value of 0.01.

RESULTS AND DISCUSSION

Respondent characteristics

Respondent characteristics include 7 characteristics: gender, age, education, labor force participation, place of residence, family size, and average monthly income per household member. Socio-demographic characteristics are shown in Table 1.

Most of the respondents were women (60.1%), young people aged 18 to 24 (49.4%), declaring higher education (49.7%), and residents of cities with more than 50,000 residents (62.5%). Most respondents had three to four family members (53.4%). The survey had the highest number of students (38.4%) and business employees (32%). Most respondents declared a monthly income of the average monthly salary (47.9%).

Table 1. Respondent characteristics

	Characteristics	Frequency	Percent
Gender	Men	131	39.9
	Women	197	60.1
Age	18–24	162	49.4
	25–34	50	15.2
	35–44	41	12.5
	45–54	52	15.9
	55–64	15	4.6
	65 and more	8	2.4
Level of education	Basic education	30	9.1
	Secondary education	116	35.4
	Vocational education	19	5.8
	Higher education	163	49.7
Professional activity	Administration employee	36	11.0
	Company employee	105	32.0
	Teacher	17	5.2
	Own business	25	7.6
	Student	126	38.4
	Unemployed	12	3.7
	Retired	7	2.1
Place of residence	Village	48	14.6
	A city with up to 50,000 inhabitants	75	22.9
	A city with more than 50,000 inhabitants	205	62.5
Number of family members	1–2 family members	103	31.4
	3–4 family members	175	53.4
	5 and more family members	50	15.2
Monthly income	Definitely above the national average *	32	9.8
	Slightly above the national average	42	12.8
	National average	157	47.9
	Slightly below the national average	70	21.3
	Definitely below the national average	27	8.2

Note: *the average monthly salary in Lithuania in 2022 was EUR 1,844 before tax (EUR 1,153 after tax) [Forms of Statistical Reports 2022].

Source: Author's own research.

Table 2. Areas of cross-border activity of Lithuanians on the Polish border market

Activity areas	Cross-border activities carried out [%]				
	none	very rarely	rarely	often	very often
Border trade	7.6	12.2	18.3	32.6	29.3
Tourism	3.7	19.8	22.9	28.0	25.6
Socio-cultural activities	10.5	27.4	33.8	20.4	7.9
Scientific cooperation	15.2	31.1	29.6	16.8	7.3
Social relations between inhabitants of regions	7.7	15.5	25.9	25.3	25.6

Source: Author's own research.

Cross-border activity of Lithuanians in the Polish border market

The variables observed when analyzing the areas of cross-border activity of Lithuanians on the Polish border market are: border trade, tourism, socio-cultural activities, scientific cooperation, and social relations between residents of border regions (Table 2).

The results of the survey indicate that the most frequently implemented cross-border activity among the respondents was border trade, tourism, and social relations. The least popular were scientific cooperation and socio-cultural activities. The findings confirm the convenience of shopping and tourism in borderless regions [Bajo-Rubio and Gómez-Plana 2005, Zhang et al. 2022].

Border trade, tourism, and social relations within the framework of cross-border activities of residents of border regions have evolved quite differently in Poland and Lithuania over the past decade [Dmitrovic and Vida 2007]. Analyzing cross-border travel in the European Union, Spierings and van der Velde (2008) point out that there are quite large differences between EU-25 Member States in the volume of border traffic and the purpose of Lithuanians' trips to Poland. They pointed out that in 2006, less than 5 percent of Lithuanians crossed the country's borders with the intention of shopping. However, the situation has changed significantly in recent years. In 2022, 2,773,000 foreigners crossed the Polish-Lithuanian border, an increase of 26.8% compared to 2021. 55.2% of foreigners crossed the Polish-Lithuanian border several times a month, and the main purpose of coming to Poland was shopping.

Among foreigners crossing the border with Lithuania, 13.0% declared that a business/professional purpose was the priority of their trip [Statistics Poland 2023].

An important motive for the development of border trade in the Polish-Lithuanian borderland was the introduction of the euro currency in Lithuania in 2015. The effect of the currency change was, and still is, very large price differences between Lithuania and Poland. The prices of goods in Poland are much lower than in Lithuania, causing Polish stores to be stormed by foreign customers. This confirms Powęska [2022] opinion that the development of border trade is influenced by differences in the level of prices of goods and the amount of income of residents of border towns.

The second very important factor influencing lower food prices in Poland is the zero VAT rate, which is in effect until the end of 2023. Prices of goods on the Polish side of the border are even 40–50% lower than in Lithuania [Bednarz 2023]. However, reducing the VAT rate on food products will not help Lithuania, because in the structure of expenditures in border trade with Poland, food products account for only about 25% of total expenditures. The remaining amount is spent by Lithuanians on non-food goods, which are subject to the standard VAT rate, which is even higher in Poland than in Lithuania: 23% vs. 21%.

Today, Poland can be considered a “Supermarket of Europe”, where shoppers from neighboring countries come in search of cheaper goods and services. The highly competitive prices of products and services in Poland are determined by the extremely competitive

domestic market and the exchange rate of the Polish zloty (PLN). The difference in price levels between Poland and Lithuania has grown to 20% over the past year, meaning that consumer goods and services in Poland are, on average, 20% cheaper than in Lithuania [Forms of Statistical Reports 2022].

Even if Lithuanians do not personally buy from our country, goods from Poland still reach them through imports. Lithuania's foreign trade deficit with Poland reached a record high of EUR 1.7 billion in 2019, and was three times higher than that with China, at EUR 570 million [Forms of Statistical Reports 2022]. In 2022, Lithuanians spent PLN 1.38 billion in Poland, and the majority of their expenditures in Poland went to non-food goods – 68.4%, on food and non-alcoholic beverages, they spent 22.9%, while on services they spent 6.3% [Statistics Poland 2023].

Data from the Lithuanian Department of Statistics show that Lithuanians spend most of their money abroad on building materials, car parts, clothes, shoes, electrical appliances, household goods, furniture, and food. In 2021, Poland received PLN 18 billion from cross-border trade, with Germans, Czechs, Slovaks, and Lithuanians leaving PLN 13 billion here [Forms of Statistical Reports 2022].

During a single trip, Lithuanians spend more money than their neighbors to the north, Latvians and Estonians. More than half of Latvians and Estonians (52%) spend less than EUR 50 on purchases abroad. Only 38% of Lithuanians spend such small amounts, while 24% of them declared spending EUR 50–100. Exactly the same proportion (24%) indicated EUR 100–200, and 13% said they spend EUR 200–500. In comparison, only 4% of Latvians and Estonians declared spending abroad in amounts of EUR 200–500 [Bagdonas 2018].

As an explanation for this situation, Bagdonas (2018) quotes George Straatmeijer, a representative of the Regioplan Institute and author of the cross-border study: “Lithuanians are distinguished by the amount they spend. If Estonians and Latvians spend tens of euros abroad, Lithuanians spend hundreds. This situation is determined by the tax policies of Lithuania's neighbors: in Poland, due to lower excise and value-added

tax, the prices of many goods are lower. Latvia has a lower excise tax on alcohol. The data allows us to say that the country maintains perhaps the most favorable position among the Baltic states – lower excises attract buyers from Estonia and Lithuania”.

Lithuanians have knowledge of prices in Poland and assess them as much lower than in Lithuania. In addition, they are informed about the features and quality of goods in Poland. This information has a positive effect on purchasing decisions. The results of the conducted research confirm the thesis of other authors [Bygvrå 2019] that cross-border purchases of Lithuanians in the Polish border market are motivated by price. Similarly, the financial factor [Dmitrovic and Vida 2007] had a significant influence on the decision of Serbs to cross the border for shopping purposes. Lithuanians are guided by the same motives as Hungarians, for whom economic factors are the main reason for shopping abroad [Michalko and Ratz 2006].

At the same time, the Lithuanian Department of Statistics reports that annual inflation was 19.7% in 2022. Prices of consumer goods increased by 27.9% over the year, and services by 13.1%. Lithuania's main import partner for services was Poland. Imports from this country increased by 75.4%, with the largest shares in transportation and tourism services – 77.6% and 8.5%, respectively [Forms of Statistical Reports 2022].

Considering regional and situational factors, it is important to mention the commuting distances and good transportation infrastructure, as well as the extensive and attractive trade and service infrastructure. The length of the border between the countries is 104 kilometers. There are two major highways (and several smaller ones) for travel between the countries. Therefore, it can be said that getting to Poland from Lithuania's major cities is easy. The short distances from the border and the speed and comfort of travel (good quality roads, no borders) serve to develop tourism and maintain neighborly relations.

Cross-border shopping or tourist activities can be considered a source of investment and jobs for border regions [Zirgulis 2023]. Lithuanian residents are becoming an important segment of the service

Table 3. The impact of socio-demographic factors on the cross-border activity of Lithuanians in selected areas

Activity areas	Gender	Age	Level of Education	Place of residence	Number of family members	Professional activity	Monthly Income
	Mann-Whitney U						
Border trade	4753.50	7.22	11.11*	5.98	5.22	15.38**	17.26**
Tourism	7807.50*	7.47	11.32*	3.81	6.74	6.66	2.43
Socio-cultural activities	8588.00	7.65	9.10	1.61	7.84	7.13	7.56
Scientific cooperation	8381.50	1.59	1.48	1.76	8.80	0.62	3.20
Social relations	7193.00	1.43	3.11	4.08	3.45	1.57	3.04

Note: * p -value<0.05, ** p -value <0.01

Source: Author's own research.

market for Polish border companies, as well as an important neighbor for residents of Polish border regions [Makkonen 2016]. Therefore, studying and understanding the determinants of cross-border activity is important, both from the perspective of achieving economic benefits from border trade, as well as strengthening common social relations and raising the standard of living of residents of border regions.

Influence of socio-demographic characteristics on the cross-border activity of Lithuanians in the Polish border market

The study considered 7 socio-demographic factors: gender, age, education, professional activity, place of residence, household size, and average monthly income per household member.

The results of the Mann-Whitney test showed that gender aspects significantly influenced the respondents' activity in the area of tourism (Table 3). A highly significant difference between male and female respondents could be seen ($U = 7807.5$, $p < 0.05$). The majority of female respondents declared participation in tourism initiatives in Poland, and they were more likely to specify tourism as their destination, which at the same time did not exclude cross-border shopping.

The results of the Kruskal-Wallis test showed that cross-border shopping activity was statistically significantly influenced by education (11.11, $p < 0.05$),

professional activity (15.38, $p < 0.01$), and average monthly income (17.26, $p < 0.01$).

The results confirm the study by Batyk et al. [2023] that material status and professional activity were important for Lithuanian consumers shopping in Poland. Since consumers spend a significant portion of their budget on FMCG products [Grigaliūnaitė et al. 2023], those declaring their income to be below the national average and at the national average level were characterized by very high cross-border trade activity. One can imagine a contradiction with the assumption that rational behavior occurs mainly in people with at least middle income, young and better educated, for whom shopping is a pleasure [Szlachciuk et al. 2022]; moreover, during the pandemic, utilitarian shopping motivations strengthened [Tömöri and Staniscia 2023]. The situation in the currency market, the very large differences in exchange rates, as well as the economic crisis and very high inflation, are also not insignificant.

Three of the analyzed characteristics: age, place of residence, and household size, had no significant impact on any of the analyzed areas of cross-border activity of Lithuanians in the Polish border market. The results of the study confirm those obtained among Mexican tourists, which showed that age and marital status were not significant factors influencing cross-border shopping [Bojanic 2011].

Sleuwaegen and Smith [2022] argue that consumers' personal or socio-demographic characteristics

(i.e., age, gender, occupation, education, location, and trust in foreign suppliers) influence their decision to shop across borders. Dmitrovic and Vida [2007] point to several associations regarding cross-border shopping behavior: positive associations with consumer income and education, negative associations with the respondents' age, and mixed evidence regarding family life cycle stages, age of children, and household size.

However, Siringoringo and Kowanda [2009] stress that demographic characteristics only describe what consumers are like, but do not indicate their needs or interests. From a cultural standpoint, cross-border shopping allows people to adopt consumption patterns that residents of neighboring countries have. Therefore, differences between countries may even favor cross-border shopping [Spierings and van der Velde 2013]. In addition, shopping as a cross-border activity allows one to experience the distinctiveness and unique culture of the visited country [Choi et al. 2016].

The results of the Kruskal-Wallis test showed that cross-border tourism activity was significantly statistically influenced by education (11.32, $p < 0.05$). This may indicate that better-educated people are more curious about the world and express more interest in traveling to Poland for tourism.

CONCLUSIONS

Cross-border activity in the Polish-Lithuanian borderland promotes the development of border trade and tourism, as well as the creation of links and dependencies between local communities living in border areas that strengthen mutual neighborly relations. The results of the study provide a basis for confirming the hypothesis that the cross-border activity of Lithuanian residents in the Polish border market is dependent on economic factors and is realized to the greatest extent in border trade. Identification of areas of cross-border activity makes it possible to stimulate their intensity and consequently can lead to the development of cross-border regions. Cross-border trade should encourage entrepreneurs to seek innovative and socially responsible practices that support the sustainable economic development of the country or region. Polish

entrepreneurs wishing to encourage Lithuanians to use their services should take into account both price differences and individual socio-demographic characteristics. Cross-border entrepreneurship should be treated as an attribute of border areas; it is an important factor in the development of the borderland and promotes the achievement of a higher standard of living by the residents. The social relations that develop within the framework of cross-border activity in the Polish-Lithuanian borderland can support a number of institutions and enterprises that carry out tasks aimed at, among other things, promoting internal economic, social, and territorial cohesion, as well as supporting social and cultural activities or building trust and good neighborly relations.

A limitation of this study is the different conditions of the markets in Lithuania and Poland. The differences are mainly in terms of currency: the euro in Lithuania and the Polish zloty in Poland, as well as different VAT rates on food. This means that in border markets with similar characteristics (same currency and taxes), the research may have different results. A huge limiting factor for the study was the difficulty of accessing respondents, reluctant participation in interviews, and uncomfortable conditions for conducting interviews (e.g., in shopping malls). Hence, the findings and conclusions of this study should be attributed solely to the Polish-Lithuanian border market, pending a comparative study in other markets. The number of observations does not authorize the formulation of representative conclusions. In addition, several very important determinants of the functioning of border markets converged during the period of the study: the global economic crisis, the geopolitical situation, and the war in Ukraine, as well as a dynamic increase in inflation and large fluctuations in the exchange rate. These factors have increased the cross-border activity of Lithuanians in the Polish border market.

The author is aware of the limitations of the study, but thus expresses a desire to develop research on other border markets, both inside and outside the EU. This is especially important in view of the planned expansion of EU structures to include other countries, such as Ukraine.

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AKTYWNOŚĆ TRANSGRANICZNA MIESZKAŃCÓW REGIONÓW PRZYGRANICZNYCH UNII EUROPEJSKIEJ (STUDIUM PRZYPADKU LITWINÓW NA POLSKIM RYNKU PRZYGRANICZNYM)

STRESZCZENIE

Cel: Celem pracy było określenie aktywności transgranicznej mieszkańców Litwy na polskim rynku przygranicznym oraz czynników socjodemograficznych determinujących taką aktywność. **Metoda:** W wywiadach wzięło udział 328 respondentów w okresie od grudnia 2022 do stycznia 2023 roku. Do analizy danych wykorzystano testy nieparametryczne. Pytania badawcze zawarte w badaniu są następujące – Q₁: Jakie są obszary aktywności transgranicznej mieszkańców Litwy na polskim rynku przygranicznym?; Q₂: Jakie czynniki socjodemograficzne determinują aktywność transgraniczną mieszkańców Litwy na polskim rynku przygranicznym? **Wyniki:** Wyniki pokazują, że respondenci wykazywali największą aktywność w handlu przygranicznym, turystyce oraz relacjach społecznych między mieszkańcami regionów. Wiek, miejsce zamieszkania, wielkość gospodarstwa domowego, nie miały istotnego wpływu na żaden z analizowanych obszarów aktywności transgranicznej Litwinów na polskim rynku przygranicznym. Wykształcenie, aktywność zawodowa oraz miesięczne dochody miały istotnie statystycznie wpływ na aktywność w handlu przygranicznym, natomiast na turystykę istotnie statystyczny wpływ miały płeć i wykształcenie. **Wnioski:** Aktywność transgraniczna sprzyja rozwojowi handlu przygranicznego i turystyki oraz tworzeniu powiązań między społecznościami lokalnymi zamieszkującymi obszary przygraniczne, które wzmacniają wzajemne relacje sąsiedzkie. Handel przygraniczny powinien zachęcać przedsiębiorców do poszukiwania innowacyjnych i społecznie odpowiedzialnych praktyk wspierających zrównoważony rozwój gospodarczy kraju lub regionu. Badanie dostarcza dowodów w kontekście realizowania aktywności transgranicznej, która wspiera mieszkańców regionów przygranicznych w dostosowaniu się do dynamicznie zmieniających się warunków geopolitycznych.

Słowa kluczowe: aktywność transgraniczna, rynek przygraniczny, handel przygraniczny, turystyka