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**PHARE PROGRAMME:
T.A. TO THE REPUBLIC OF POLAND
FOR TOURISM DEVELOPMENT**

Tourism marketing in Poland

A report on the results obtained
from a visit to Warsaw

Barcelona, 25 March 1993

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1. TASKS TO BE PERFORMED

According to the terms of reference drawn up by the PMU, the tasks to be performed were the following:

1. To evaluate the present National Marketing Strategies and the modifications on these strategies, proposed by the Programme Coordinator.
2. To give an illustrated presentation on how to develop a tourism marketing plan (using examples of Spain, Argentina and Belgium). This would include the review of the C.I., national branding and logo of Poland as a tourist destination.

The required output was defined as follows:

1. Graphic material of the presentation in Warsaw on 17 March 1993.
2. Written comments on the modifications proposed by the Programme Coordinator for the National Marketing Strategies.

2. SCHEDULE OF ACTIVITIES PERFORMED

According to the planning, Mr. E. Bordas visited Warsaw during 5 days; he arrived on Sunday 14 March and departed on Thursday night 18 March, 1993.

During his mission the following activities were carried out:

15 March	09.00 a.m.	Briefing by Programme Coordinator
	11.00 a.m.	Review of current Polish tourism promotion material
17 March	09.30 a.m.	Review of marketing research undertaken in Poland with Mr. Lopacinski, Director of IOT.
	11.00 a.m.	Presentation at SSTA: "National Approaches to Tourism Marketing and suggestions for Polish tourism development strategies".

18 March

10.30 a.m.

Discussion with Mr. Dolinski, Director of COTI, on stand design, stand organisation and general promotion activities of COTI

02.00 p.m.

Meeting with Mr. Jermanowski on National Tourism Marketing and the role of SSTA.

3. PRESENTATION IN WARSAW ON NATIONAL TOURISM MARKETING

The text of this presentation is included in Annex A of this document.
A summary of the presentation is given below.

3.1 Tourism marketing: a revision of the past and present situation

Review of marketing trends in the last 30 years, indicating that in the 60's no specific marketing actions were taken because of a demand explosion, in the 70's the main actions were directed at sales promotion, while during the 80's marketing was focussed on communication and advertising in particular, in response to a general stabilisation of markets.

The present situation shows a stabilisation and maturity of the market which results in a high segmentation level, high sophistication of demand, decreasing bargaining power of supply side and a high competitiveness between destinations. This situation asks for new a marketing approach.

3.2 The need for a new marketing approach towards tourism

The new approach is based on the philosophy that there does not exist just 1 tourism business, but different tourism businesses, each with their own attractiveness, keys for success and "rules of the game", parting from the fact that every basic need can be satisfied in different ways.

So these basic needs create opportunities for different tourism businesses for which we offer concepts. Specific ways to satisfy these needs result in the existence of different markets to which we offer specific products. And based on the different motivations and habits on information, buying and use of the markets, segments are created to which we present specific offers (product + price).

3.3 Marketing of Services

According to this new philosophy, a new marketing concept is introduced, replacing the product oriented marketing approach by a service oriented approach, considering the tourism sector as a service industry.

The basic model on how the develop marketing of services consists of 4 phases:

1. Conceptualisation

In this phase the concept of the service to be marketed is defined, bringing together the essentials that we want to offer and the essentials that the client wants to buy.

An example of Spain illustrates best this definition:

- The essentials that we want to offer: diversity of tourism activities and products
- The essentials that the client comes to buy: sun
- This resulted in the concept of "Spain, everything under the sun"

A similar concept should be defined for Poland.

2. Global product definition (Structuring)

The national tourism product should be globally defined in two ways:

- a. By regions having intrinsic tourism opportunities
This means a global structuring of the main national tourism products to be offered to global markets. A first approach for Poland could yield the following distinct tourism regions:

The Baltic Coast
The lakes region
The southern mountain range
Historic cities

To brand these regions in the market they could be promoted, for example, as:

"The Polish Riviera"
"The Great Lakes"
"The fun mountains"
"Cities of yesterday and tomorrow"

- b. By tourist activities

This means that the most relevant activities tourists can do in Poland need to be identified. These activities would be in the mountains, e.g. skiing trekking, biking, etc.

Then specific offers (products + price) must be created, as this is "the only thing a client can buy".

- c. "Servuction"

Once the offers have been created, they have to be "servuctioned". "Servuction" means defining the process of the production of services. As a service is both produced and consumed at the same time, this process is somewhat more complicated than the production of goods. This implies the exact and effective definition of the role of the three inputs for producing a service, i.e. the physical support, the personnel in contact and the client's participation.

In order to well define the right products and activities and "servuction" them in the right way, an extensive research on the different markets and segments will be necessary, prioritizing them according to a list of criteria and subsequently elaborating a product/market matrix.

3. Commercialisation

This phase consists of defining the communication strategies and selecting the appropriate sales systems for the tourism offers earlier defined. A practical example was given of the Ardennes, showing the process of market prioritization based on market information and the basic market(ing) strategies (positioning, segmentation, product and commercialisation).

Subsequently the most appropriate communication mix for each product/market segment can be produced.

The same holds for the selection of sales systems which can be different for each specific product/market segment.

4. Delivery of services

This last phase concerns the process of internal marketing and quality control.

3.4 Poland and a National Tourism Marketing Plan

If Poland would want to compete in the tourism sector, it is highly recommended to develop a Marketing Plan based on this philosophy.

Old concepts like selling countries, attractions, transport and lodging facilities are being replaced by concepts like selling benefits in specific tourism clusters and tourist activities that people can develop in such a cluster. Considering the market as a whole is not feasible anymore, a segment approach is to be developed.

The role of the private sector in tourism marketing is becoming more and more important, cooperative marketing being the new trend. Instead of exploiting comparative advantages, competitive advantages have to be created in this new situation of high rivalry between destinations.

Renewed efforts must be placed on quality and quality control, recommendation and repeat business. And finally a high professionalism and a scientific marketing approach instead of "smell" marketing is needed.

4. COMMENTS ON THE MODIFICATIONS PROPOSED BY THE PROGRAMME COORDINATOR FOR THE NATIONAL MARKETING STRATEGIES

All available documents in english concerning marketing strategies for Poland as a tourist destination were received and analysed by the expert, as well as the modifications for the National Marketing Strategies, prepared by the Programme Coordinator.

A list of these documents is given below:

- Main assumptions of the Promotion Programme for the years 1991-1994, Dr. Krzysztof Lopacinski/Dr. Andrzej Jagusiewicz, November 1991 (presently being revised)
- Summary of the Annual detailed Action Tourism Marketing Plan, 1993
- Trends in promotion of Poland - a country of tourism, in the years 1992-93 in the perspective of the arrival tourism in 1991, SSTA (presently being rewritten)
- The schedule of Marketing Research in 1992, SSTA (presently being rewritten)
- Programme of promotion: Marketing and Promotion, SSTA draft (presently being rewritten)
- Selected problems of expansion and development of the Polish Tourism Industry
- Notes on a meeting at the Center of Tourist Information with Mr. Dolinski, February 1993
- Record of the meeting at SSTA on Marketing in Tourism, Draft suggestions for revision of the marketing plan.

Additional information was obtained through the meetings organized in Warsaw, and especially through an extensive briefing by the Programme Coordinator and a meeting with Mr. Jermanowski, Director General of the SSTA and responsible for marketing.

4.1 General comments Tourism Marketing in Poland

As indicated in various occasions by the Programme Coordinator, for most Polish officials working on tourism, marketing means communication, or even promotion, which is clearly reflected in the revised documents on Polish tourism "marketing". Some basic concepts like segmentation and product development are mentioned, but a lack of profound knowledge was detected on tourism marketing and its latest techniques.

A seminar prepared by the Programme Coordinator for Polish tourism officials, explaining the basic technical vocabulary on "modern" tourism marketing, has not only been most necessary from training point of view, but also instilled the awareness among the officials that a proper Tourism Marketing Plan for Poland is a first priority.

What is lacking at present is the technical know-how and the necessary human resources to develop this plan. The expert considers that, although this technical know-how and the corresponding human resources might be provided through the PHARE programme funds, first a marketing training seminar for tourism officials (and also recommended for the private sector) should be implemented to provide them with the necessary know-how before this plan is prepared. It is understood that such a training programme is being planned.

4.2 Comments on the suggestions for a revised Polish Marketing Plan for the tourism sector by the Programme Coordinator

Most elements to be included in such a plan are mentioned in the paper prepared by the Programme Coordinator.

Although it does not correspond to the specific objectives of a marketing plan, but rather to those of a tourism development plan/masterplan, it is indeed necessary to define a general tourism development policy and the role and responsibilities of the Polish Government, especially taking into account the new political and economic situation in Poland.

This could form the base for and give direction to the Marketing Strategies to be developed. The answer to the question "What do we want to achieve with tourism development in Poland?" is of essential importance to the Marketing Strategies to be defined.

Many work methods exist to arrive at Marketing Strategies, the elements and information basically being the same in most cases. However, some work methods provide broader and more profound models for analysis, considering a wider scope to be studied.

One of the latest theories on the development of tourism marketing planning is that of the competitive marketing theory, based on the competitive industry theory of Mr. Michael Porter. This theory considers not only the marketing aspect but also the competitiveness of the sector by clusters.

This method could be applied for the development of a Competitive Marketing Plan for the tourism sector of Poland, giving special attention to those aspects of specific importance for Poland, like product development and quality control.

4.3 Proposed scheme for the preparation of a Polish Competitive Marketing Plan

The following scheme for the preparation of such a Competitive Marketing Plan is proposed:

Part 1: PREPARATION OF A STRATEGIC MARKETING PLAN	
1.1	General contents
	<ul style="list-style-type: none">- Analysis of the past and actual situation of the Polish tourism sector- Design of the market and marketing strategies- Design of the guidelines for the structuring of tourism products by cluster- Definition of the commercialisation strategies of the tourism products and clusters (communication and sales system strategies)
1.2	Methodology and specific outputs
1.2.1	Global analysis <ul style="list-style-type: none">- Identification and audit of the tourism products and clusters in Poland- Identification and audit in the field
1.2.2	Global analysis of markets and segments (actual and potential) <ul style="list-style-type: none">- Identification of markets/segments (international and domestic)- Identification of the "keys for success" of each market/segment- Evaluation of the attractiveness of each market/segment for Poland
1.2.3	Marketing of clusters <ul style="list-style-type: none">- Marketing audit of each cluster- Evaluation of the marketing attractiveness of each market/segment for each cluster- Evaluation of the competitive opportunities and strengths of each cluster in each market/segment- Strategic marketing plan for each cluster (conceptualisation, structuring, commercialisation)
1.2.4	Integration at national level of the plans developed

Part 2: COMPETITIVE PLAN	
2.1	General contents of the competitive plan for each cluster
	<ul style="list-style-type: none"> - Strategic markets and segments in which the cluster should concentrate its efforts - Growth and development strategies for the cluster - Priorization of product development within the cluster - Touristic management model for the cluster - Public policies stimulating a better management of tourism enterprises, the conditions of factors, tourism demand and the support services in the cluster
2.2	Methodology and specific output
2.2.1	Identification of the most attractive strategical segments for each cluster
2.2.2	Evaluation of the competitive situation of each cluster in each segment
2.2.3	Identification of the aspects that should be improved in order to reinforce the competitiveness of each cluster
2.2.4	Design of the necessary public policies for stimulating competitiveness

Part 3: OPERATIONAL MARKETING PLAN	
3.1	Methodology and specific output
3.1.1	Inventory of offers ready for commercialisation of each cluster
3.1.2	Establishment of quantitative objectives
3.1.3	Elaboration of the briefing for the design of the corporate identities for each cluster (and product)
3.1.4	Design of the sales systems to be used for each market/segment
3.1.5	Technical description and/or briefings for each of the communication actions to be implemented, according to the communication mix established in the strategic marketing plan of each cluster
3.1.6	Planning and budgeting for all marketing actions

Part 4: MONITORING AND FEEDBACK	
During the implementation of the plans, i.e. the total period of validity, the results must be monitored and feedback must be given on the benefits and effectiveness of the plans.	

4.4 Specific ideas brought forward by the Programme Coordinator

Apart from the communication mix to be developed in the plan, a series of specific and alternative ideas mentioned by the Programme Coordinator should be included in the marketing plan:

- Strategy for the location and functioning of NTO's abroad or other alternative forms of representation abroad
- Travel trade partnerships between private sector members from Poland and main origin markets
- Cooperative marketing between private and public sector (including piggyback marketing)
- Production of a TV serial set in typical Polish scenery
- A touring Polish train or caravan giving tourist information and promoting tourism to Poland in neighbouring countries.

BIBLIOTEKA IT
Archiwum Prac
Naukowo-Badawczych

ANNEX A

**GRAPHIC MATERIAL USED IN THE PRESENTATION ON TOURISM
MARKETING IN WARSAW 17/03/93**

2,

HOW COUNTRIES SET ABOUT TOURISM MARKETING

- **A SUMMARY OF 30 YEARS TOURISM MARKETING:**

FROM ZERO, TO A BIG CRISIS

1960

EXPLOSION OF TOURISM DEMAND



NO MARKETING ACTION WAS USED NOR NEEDED!!

1970

THE BIG SUCCESS OF SUN & BEACH HOLIDAYS

NEW COMPETITORS ENTER IN THE MARKET



SALES PROMOTION



TOURISM FAIRS



PUSH

6.
1980

THE GENERAL STABILISATION OF MARKETS



ADVERTISING ENTERS IN ACTION



PULL

4.
1990

STABILISATION AND MATURITY OF THE MARKET



- **HIGH SEGMENTATION LEVEL**
- **HIGH SOPHISTICATION OF DEMAND**
- **DECREASING BARGAINING POWER OF SUPPLY SIDE**
- **EXPLOSION OF NEW COMPETITORS**



HIGH RIVALRY BETWEEN COUNTRIES



TREMENDOUS COMMERCIAL AGGRESSIVENESS



CRISIS OF THE OLD SYSTEM!

8

FROM NOW ...

?



MARKETING!

9

THE TOURISM BUSINESS

DOESN'T EXIST

**THERE ARE A DOZEN
OF
DIFFERENT TOURISM BUSINESS'**

11.

EACH TOURISM BUSINNES HAS:

- DIFFERENT ATTRACTIVENESS
 - DIFFERENT KEYS FOR SUCCESS
 - DIFFERENT "RULES OF THE GAME"
-

EVERY BASIC NEED CAN BE SATISFIED IN DIFFERENT WAYS



Different ways to interchange "value for money"



MARKETS

WHAT IS A TOURISM BUSINESS?

- **A WAY TO EARN MONNEY**
- **SATISFYING A BASIC NEED**

.... WHEN THIS REQUIRES TRAVELLING

BUSINESS, MARKETS, PRODUCTS AND OFFERS

ORIGIN OF THE
OPPORTUNITIES

MAKING THE OPPORTUNITIES
CONCRETE

WHAT DO WE OFFER

Basic needs

Business

Concepts

Specific ways to
satisfy the needs

Markets

Products

Different motivations
and habits for infor-1
mation buying and use

Segments

Offers

WHAT HAS ONE TO DO WITH THE OTHER?

**GOLF
TOURISM**

TOURING

**SUN & BEACH
TOURISM**

SKI TOURISM

SPORTIVE TOURISM BUSINESS

MARKETS

GOLF

HORSERIDING

SKIING

OTHER SPORTS

S1

S2

S3

17

THE TOURISM BUSINESS DOES NOT EXIST

WHAT DOES EXIST?

DIFFERENT BUSINESS'

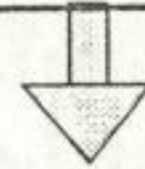
FOR WHAT DO WE FIGHT?

MARKETS

FOR WHAT DO WE COMPETE?

SEGMENTS

MARKETING OF SERVICES



Conceptualisation



Structuration



Commercialisation



Delivery of service

CONCEPTUALISATION

STRUCTURATION

STRUCTURATION

2 Levels:

1.- Conceptual structuration

2.- Structuration of services



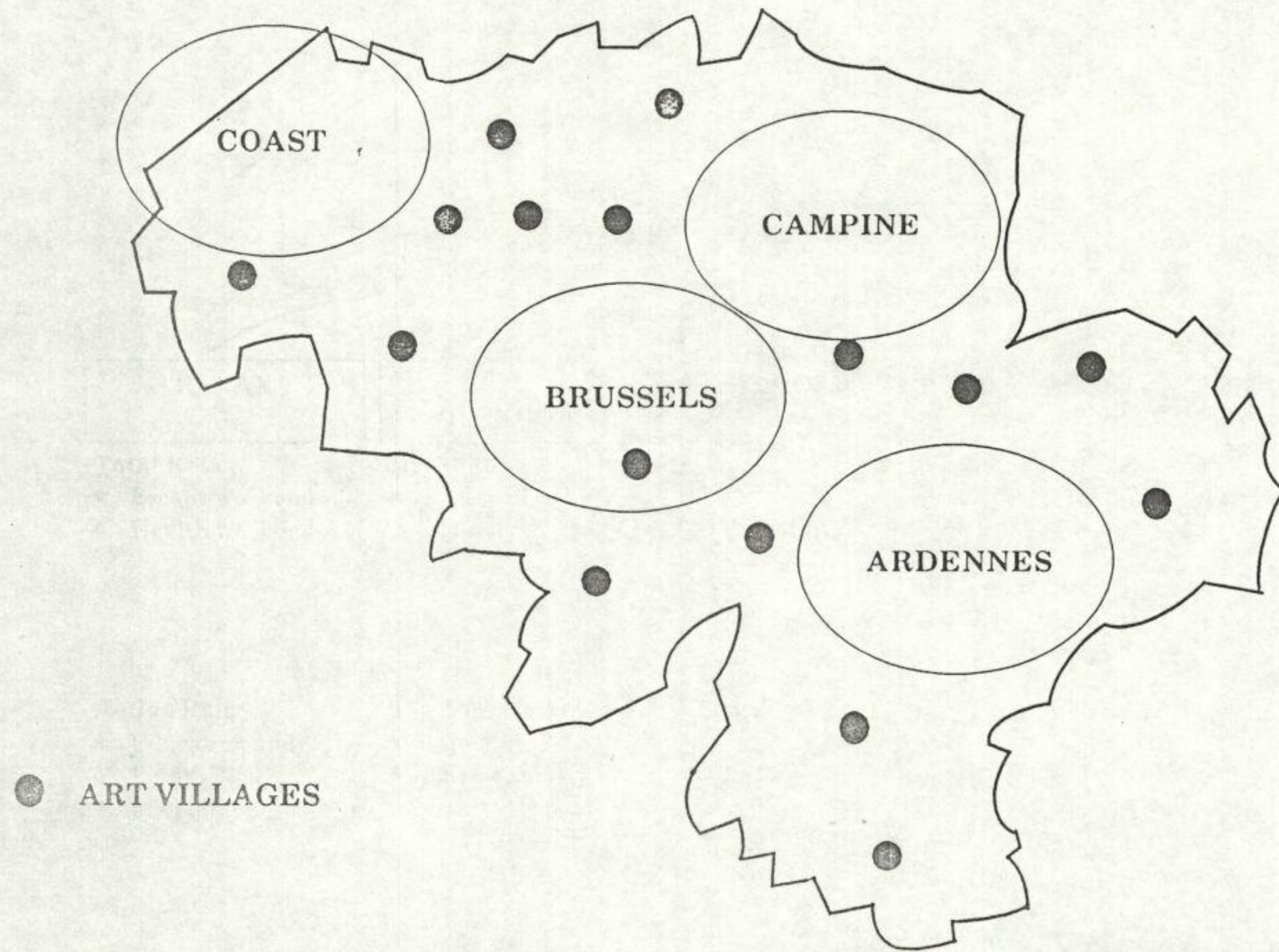
Create "offers"

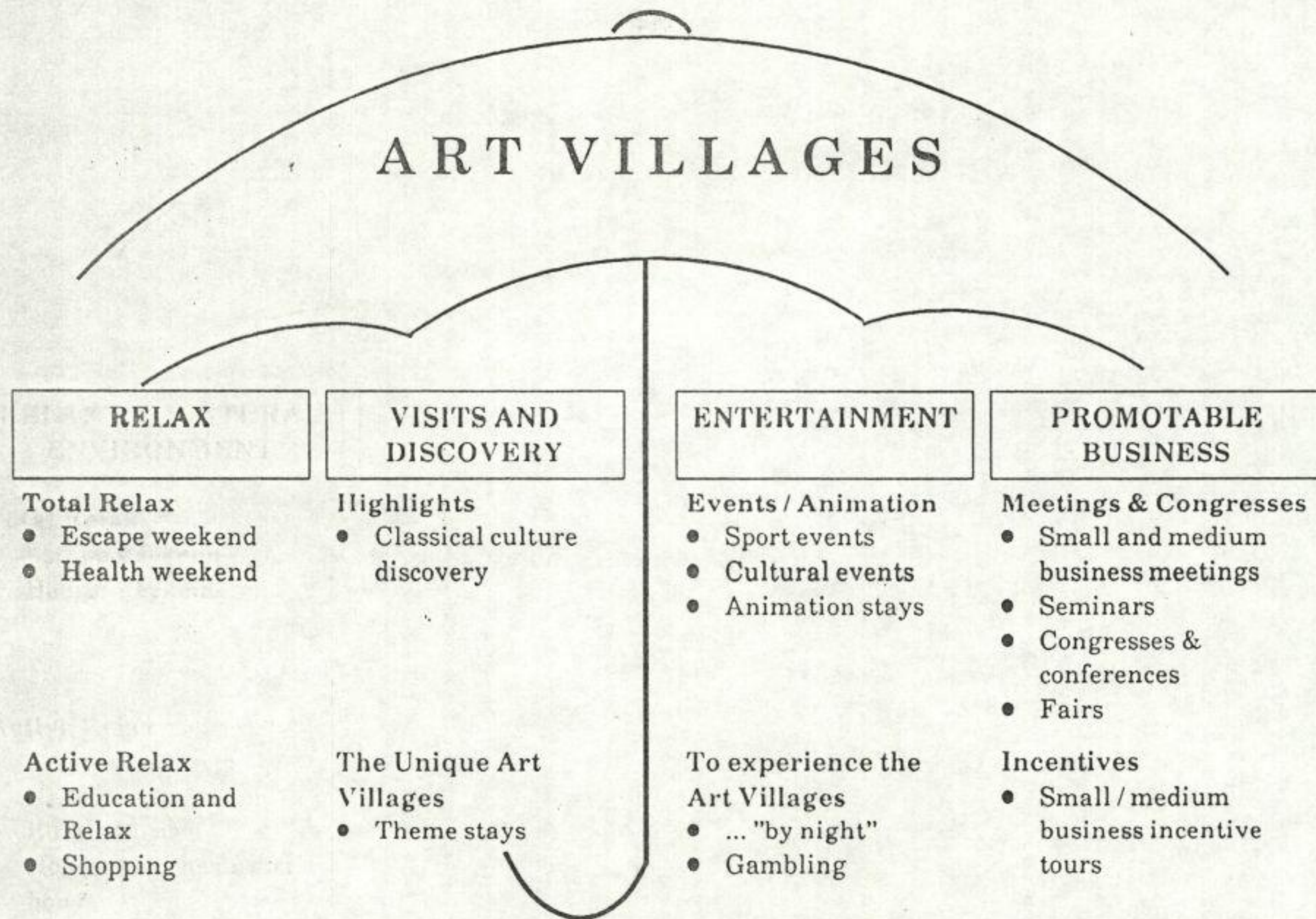


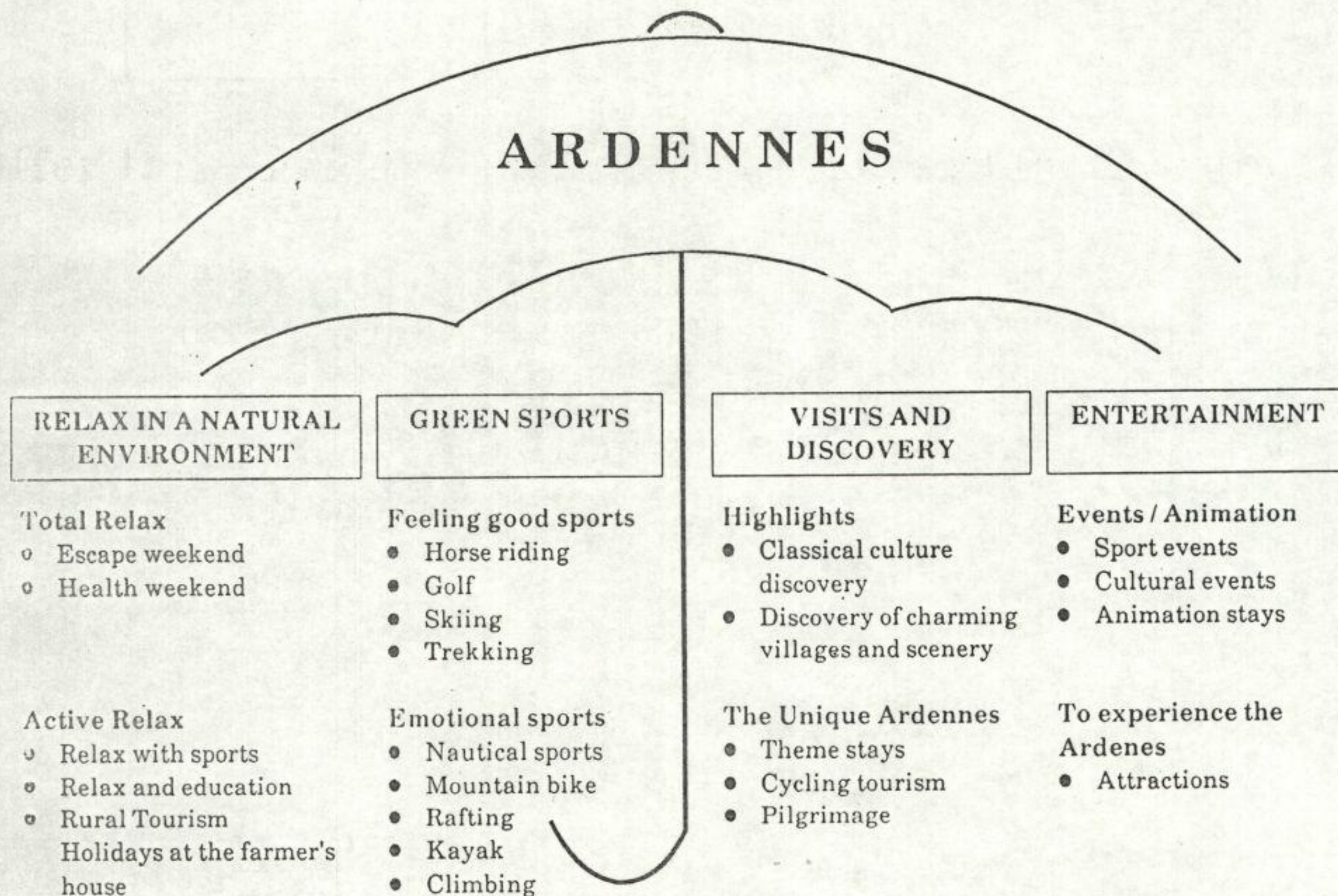
Servuction of offers

BELGIUM

TOURIST ATTRACTIONS







HEALTH WEEKEND

Offer 1:

Friday: Arrival at hotel, cocktail and dinner.

Saturday: Morning:
Exercises in the mountain and rafting
Afternoon:
Sauna, massage and beauty treatment
Dinner by candlelight

Sunday: Morning:
Jazz music and exercises
Forest trail programme
Afternoon:
Tea
Sauna and massage

Hotel "x" of 4 stars, double room
Prive per person: 375 US\$

AN OFFER



The only thing

The client can buy!

	ARDENNES	CAMPINE	COAST	ART VILLAGES	BRUSSELS
1.- VISITS / DISCOVERY					
Highlights of ... 1.1.- Classical culture discovery 1.2.- Discovery of charming villages and scenery ... Unique 1.3.- Theme stays 1.4.- Cycling tourism 1.5.- Pilgrimage tours					
2.- RELAX					
Dolce Farniente (Total relax) 2.1.- Escape stays 2.2.- Health tourism 2.3.- Sun & Beach Tourism Active relax 2.4.- Relax & Sports 2.5.- Relax & Education 2.6.- Rural Tourism					
3.- ENTERTAINMENT					
Events / Animation 3.1.- Sport events 3.2.- Cultural events 3.3.- Stays for animation To experience ... 3.4.- Attractions 3.5.- ... "by night" 3.6.- Gambling					

	ARDENNES	CAMPINE	COAST	ART VILLAGES	BRUSSELS
4.- SPORTS					
"Feeling Good" Sports 4.1.- Horseriding 4.2.- Fishing 4.3.- Golf 4.4.- Skiing Emotional Sports 4.5.- Nautical sports 4.6.- Mountain bike 4.7.- Rafting					
5.- PROMOTABLE BUSINESS					
Meetings & Congresses 5.1.- Small and medium business meetings 5.2.- Business meetings 5.3.- Congresses and conferences 5.4.- Fairs Incentives 5.5.- Incentive tours for small/medium business meetings 5.6.- Incentive tours for big business meetings					

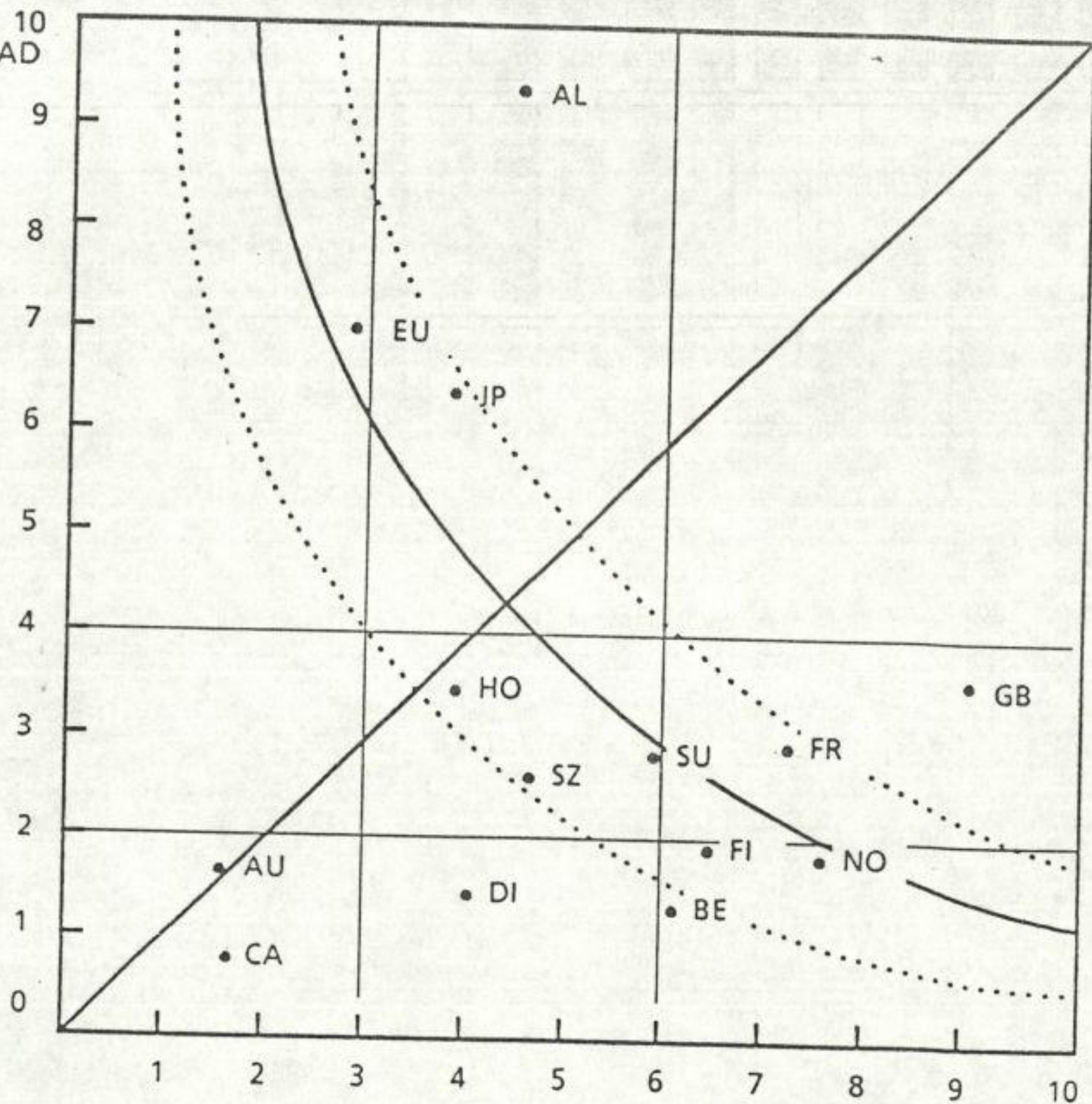
PRIORIZACION DE PAISES

PAISES CONCEPTO	ALEMA- NIA	BELGICA	DINA- MARCA	FRANCIA	G. BRETAÑA	HOLAN- DA	ITALIA	AUSTRIA	FINLAN- DIA	NORUE- GA	SUECIA	SUIZA	CANADA	EE.UU.	JAP
GASTO EN EUROPA	18.535	2.800	2.332	5.500	8.099	5.315	3.114	3.299	1.151	2.645	2.876	3.650	1.035	6.500	5.00
INDICE REL. DE CRECIMIENTO	1	1,04	1,03	1,01	1,02	1,02	1,25	1,05	1,08	0,93	1,03	0,99	0,94	1	1
INDICE REL. DE ESTACIONALIDAD	1	0,74	1,14	0,87	1,18	0,75	0,79	0,92	1,50	1,41	1,48	0,72	1	1,41	1
INDICE REL. "NO SOLY PLAYA"	1	0,81	0,97	0,97	0,73	1,34	1,40	1,06	0,95	0,79	1	1,34	1,50	1,50	1
INDICE ATRACTIVIDAD	18,54	1,74	2,66	4,69	7,12	5,45	4,31	3,37	1,77	2,74	4,40	3,49	1,46	13,75	12
INDICE ATRACTIVIDAD REDUCIDO	9,27	0,87	1,33	2,34	3,56	2,72	2,15	1,69	0,89	1,37	2,20	1,74	0,73	6,87	6
CUOTA DE MERCADO	13	19	13	26	32	12	17	5	17	20	16	11	6	6	7
INDICE REL. DE VARIACION	0,90	0,89	0,87	0,93	1	1,02	1,13	1,04	1,14	1	1	1,10	0,88	1	1
POSICION COMPETITIVA 1	11,70	16,91	11,31	24,18	32	12,24	19,21	5,20	19,38	20	16	12,10	5,28	6	7
INDICE ATRACT/VISITAS DE ESPAÑA	1,03	0,97	0,90	0,88	0,84	0,85	1,39	-	-	-	-	-	-	-	-
POSICION COMPETITIVA 2	11,39	18,43	11,70	22,88	26,88	10,20	23,63	-	-	-	-	-	-	-	-
INDICE COMPETITIVIDAD REDUCIDO	4,46	6,14	3,90	7,63	8,96	3,40	7,88	1,73	6,46	6,67	5,33	4,03	1,76	2	2
IND. ATRAC. * POS. COMP.1	216,86	29,49	30,13	113,35	227,71	66,69	82,70	17,55	34,39	54,80	70,35	42,18	7,71	82,49	90
% HORIZONTAL 1	18,48	2,51	2,57	9,66	19,41	5,68	7,05	1,50	2,93	4,67	6,00	3,60	0,66	7,03	8
IND. ATRAC. * POS. COMP.2	248,18	32,14	31,17	107,26	191,28	55,57	101,73	17,55	34,39	54,80	70,35	42,18	7,71	82,49	9
% HORIZONTAL 2	21,15	2,74	2,66	9,14	16,30	4,73	8,67	1,50	2,93	4,67	5,99	3,59	0,66	7,03	8
INDICE DE PRIORIDAD REDUCIDO	41,36	5,36	5,19	17,88	31,88	9,26	16,95	2,92	5,73	9,13	11,73	7,03	1,28	13,75	1

	ALLEMAGNE	GRANDE-BRETAGNE	PAYS-BAS	SUISSE	BELGIQUE	ITALIE	ÉTATS-UNIS	ESPAGNE	JAPON	AUTRICHE	CANADA	DANEMARK	SUÈDE	AUSTRALIE	BRÉSIL	PORTUGAL	MEXIQUE	FINLANDE	NORVÈGE	ARGENTINE	GRÈCE	IRLANDE	AFRIQUE DU SUD	VÉNÉZUELA	HONG-KONG
Montagne hiver	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Tourisme d'affaires		●			●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Tourisme fluvial	●	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Golf	●	●	●				●		●	●		●	●						●			●	●	●	●
Courts séjours		●		●	●	●		●			●				●	●						●		●	●
Cyclotourisme	●	●	●				●				●	●	●						●				●		
DOM TOM	●			●	●						●	●	●	●				●							
Gastronomie							●		●	●	●		●	●	●								●	●	
Remise en forme				●	●	●	●		●	●	●		●												
Itinéraires visites cult.	●					●	●		●		●	●									●			●	●
Séjours linguistiques							●			●		●									●	●			●
Shopping							●		●						●					●				●	●
Randonnées pédestres		●						●					●									●			
Festivals				●			●								●	●				●			●		
Tourisme sportif			●										●		●					●			●		
Camping caravanning		●	●										●					●				●			
Châteaux demeures W.E.		●		●						●												●			
Jeunes		●				●		●										●							
Musées							●								●	●									
Fly and dive											●		●		●										
Littoral		●											●					●					●		
Routes historiques		●						●														●			
Montagne été					●				●		●														
Route des vins											●	●					●								
Naturisme			●																						●
Thermalisme				●																●					
Tourisme urbain									●																
Canoë kayak	●																								

MATRIZ ATRACTIVIDAD- COMPETITIVIDAD DE LOS MERCADOS GEOGRAFICOS

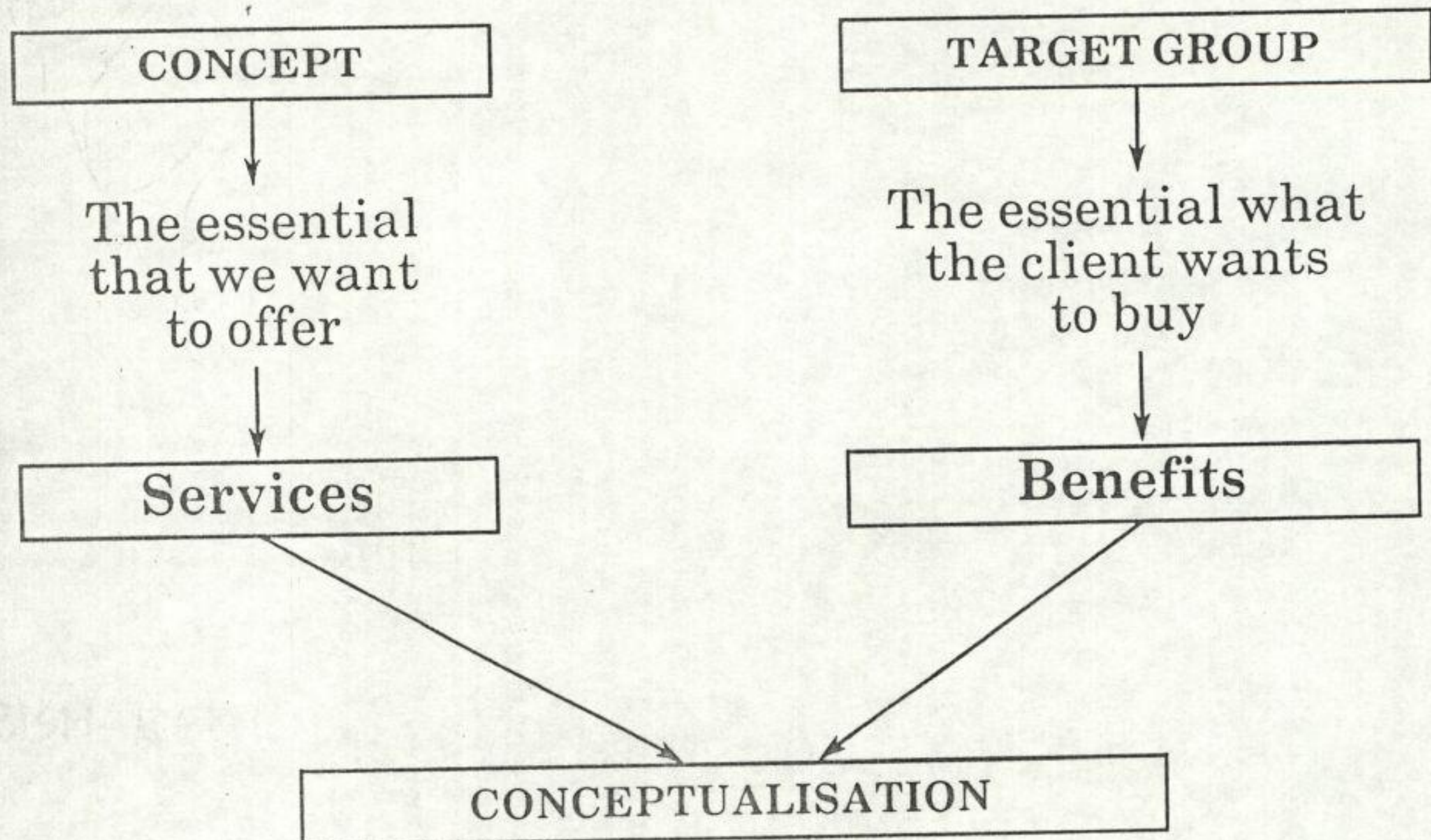
INDICE DE
TRACTIVIDAD

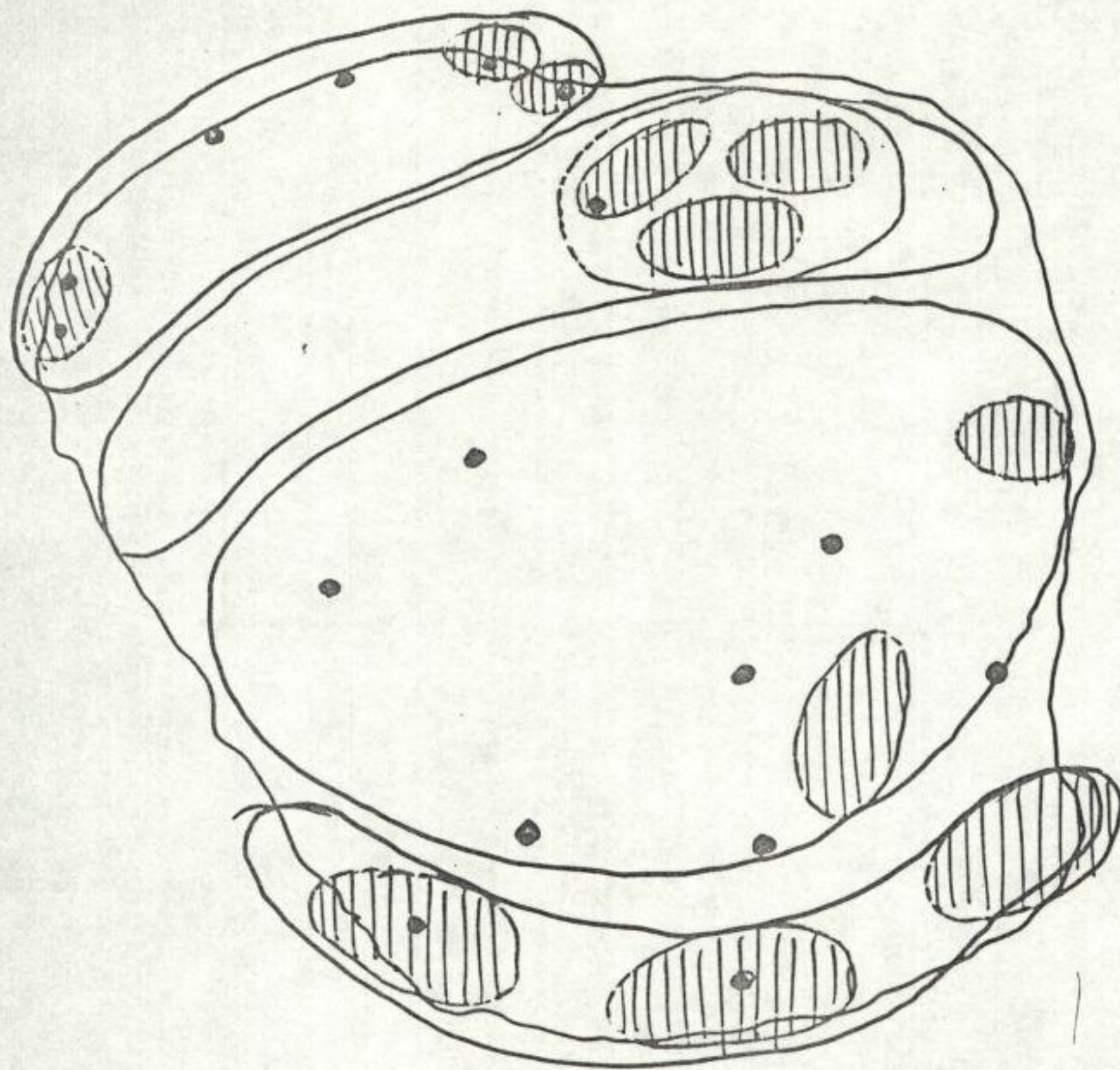


INDICE DE
COMPETITIVIDAD

INDICE DE PRIORIDAD GLOBAL	PAIS	SOL Y PLAYA	TOURING	TURISMO CULTURAL/ EDUCACIONAL	TURISMO DEPORTIVO	PROMOTABLE BUSINESS	OTROS
100	ALEMANIA						
77.2	REINADO BRETANA						
43.4	FRANCIA						
41.2	ITALIA						
39.2	JAPON						
33.3	ESTADOS UNIDOS						
28.2	SUECIA						
22.5	HOLANDA						
22.1	NORUEGA						
17.1	SUIZA						
13.9	FINLANDIA						
12.9	BELGICA						
12.6	DINAMARCA						
7.1	AUSTRIA						
3.1	CANADA						

CONCEPTUALISATION





TOURISM REGIONS - CLUSTERS AND CITIES

COMMERCIALISATION

- Communication
- Sales systems

TOURISM BUSINESS OF THE ARDENNES

TOTAL DEMAND						
MARKETS	NIGHTS		REVENUES		EXPENDITURE/DAY	EVOLUTION (80-89) OF NIGHTS
	'000	%	Billions BF	%	BF	% $\nabla\Delta$
Belgium	8.303	70	7,0	62	843	24
Abroad	3.620	30	4,3	38	1.190	76
Total	11.923	100	11,3	100	950	34

TOTAL DEMAND						
MARKETS	NIGHTS		REVENUES		EXPENDITURE/DAY	EVOLUTION (80-89) OF NIGHTS
	'000	%	Billions BF	%	BF	% $\nabla\Delta$
Netherlands	2.825	78	3,1	72	1.100	95
Germany	195	5	0,3	7	1.400	41
Great Britain	130	4	0,2	6	1.500	10
France	210	6	0,4	9	1.500	40
Italy	30	0,6	0,0	0	1.400	4
Spain	15	0,4	0,0	0	1.400	77
Others	215	6	0,2	6	1.400	33
Total	3.620	100	4,3	100	1.190	76

PRIORITY MARKETS FOR THE ARDENNES

a) Growth potential

VOLUME	ACTUAL MARKET (number of stays)	PRIMARY TARGET (1) (number of tourists)	SECONDARY TARGET (2) (number of tourists)
Holland	420	1.575	1.200
	40	280	750
	27	950	3.050

Index of potential market/actual market

VOLUME	ACTUAL MARKET (number of stays)	PRIMARY TARGET (1) (number of tourists)	SECONDARY TARGET (2) (number of tourists)
Holland	100	375	285
France	100	700	1.875
Germany	100	3.520	11.295

(1) Interest + preference (2) Interest

b) Objectives versa characteristics of the market

*** Rise in number of stays

Holland	***
Germany	**
France	*

** Rise in expenditure per person/per day

ACTUAL MARKET

EXPENDITURE P.P./P.D.

	Expenditure	Index FR = 100
Holland	1.100	73
Germany	1.400	93
France	1.500	100

* Diversification of markets

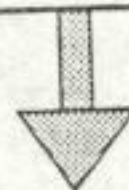
Holland	*
Germany	***
France	***

MARKET STRATEGY ARDENNES

HOLLAND

a) Positioning

COMPETITION		ADVANTAGES OF BELGIUM	ADVANTAGES OF COMPETITION	IMAGE OF PRODUCT	IMAGE OF BELGIUM
Germany	51	Proximity 28	Don't know 30	Nature 42	Nice, friendly
France	34	Don't know 27	Landscape, nature 17	Beautiful, interesting 32	Beautiful, interesting
G.D. Luxembourg	19		Better climate 13	Sport possibilities, walking 32	Warm, welcoming people
Holland	13			Scenery 30	Art Villages, culture



Opportunities for doing sports in natural surroundings, nearby and in a welloming and warm ambience

41.

c) Priorities

1.- Holland ***

2.- Germany **

3.- France *

MARKET STRATEGY ARDENNES

HOLLAND

b) Segmentation	PRIMARY TARGET	SECONDARY TARGET
1.- Geographic <ul style="list-style-type: none"> • Lumburg North Brabant • North & South Holland, Utrecht, Seeland • North-East Holland 	** *** **	** *** **
2.- Socio-Demographic <ul style="list-style-type: none"> • 18-34 • 35-54 • 55 + • Families without children • Families with children • Medium social class • High social class 	*** *** * *** ** ** ***	*** *** * *** ** ** ***
3.- Motivational <ul style="list-style-type: none"> • Walking, sports • Relax • Visits 	*** *** *	

MARKET STRATEGY ARDENNES

HOLLAND

c) Product

Holidays	1-3 nights	***
Holidays	4-7 nights	**
Holidays	1 7 nights	**

d) Commercialisation

Direct	***
Intermediaires	

OBJECTIVES OF THE COMMUNICATION

1.- TO INFORM

- To know
- To understand

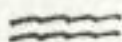



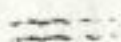


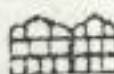
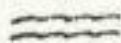



2.- TO MOTIVATE

- Create an image
- Explain advantages
- Create a preference

3.- TO INDUCE TO ACTION

- Buying / selling
- Repeat
- Recommend

Schéma de Communication Globale

Produit Pays	Côte	Ardennes	Campine	Villes d'Art
PB	 <div></div>	 <div></div>	 <div></div>	 <div></div>
ALL	 <div></div>	 <div></div>	 <div></div>	 <div></div>
FR	 <div></div>	 <div></div>	<div></div>	
GB	 <div></div>			
IT				
ESP				
Reste Pays				 <div></div>

COMMUNICATION STRATEGY

CONTENTS	TARGET GROUP	
	<i>GENERAL</i>	<i>SPECIFIC</i>
<i>GENERAL</i>	Global message	General message for specific segments
<i>SPECIFIC</i>	Specific messages for general public	Specific messages for specific segments

47.

B. HOW TO MAKE PROFITABLE YOUR PARTICIPATION AT FAIRS? 1.2

MALLORCA

- 98 % clients from
TTOO

"B"

- Fam Tours
- Workshops (60 %)
- Fairs

ANDORRA

- 92 % independent
travellers

"C"

- Advertising (80 %)

ARGENTINA

- 60 % clients from
TTOO

"B"

- Workshops/
Fam tours/fairs (70 %)

+

"C"

- Advertising/Direct
Marketing (30 %)

THE COMMUNICATION MIX: WHAT TO DO WITH 100 US\$?

CASE A		CASE B		CASE C	
Adverti- sing	50 %	Adverti- sing	20 %	Adverti- sing	80 %
		Work- shops	35 %		
Publica- tions	20 %	Famtours	20 %		
Work- shops	15 %	Fairs	15 %		
Fairs	15 %	Direct Marketing	10 %	Direct Marketing	20 %
SPAIN (89)		ARGENTINA (92)		ANDORRA (92)	

THE NEW TOURISM MARKETING

THE HISTORIC APPROACH	THE NEW APPROACH
<ul style="list-style-type: none">● SELLING COUNTRIES	<ul style="list-style-type: none">● SELLING THE BENEFITS OF A "TOURIST EXPERIENCE" IN SPECIFIC "CLUSTERS"
<ul style="list-style-type: none">● SELLING THE ATTRACTIONS, TRANSPORT AND LODGING FACILITIES OF A COUNTRY	<ul style="list-style-type: none">● SELLING THE TOURIST ACTIVITIES THAT PEOPLE CAN DEVELOP IN A COUNTRY/CLUSTER
<ul style="list-style-type: none">● CONSIDERING THE MARKET AS A WHOLE	<ul style="list-style-type: none">● FOCUSSING ON SEGMENTS

A. WHAT ABOUT TOURISM FAIRS?

2.2

THE COMMUNICATION MIX (Spain 91):

TARGETS	Adverti- sing 40 %	Publicity 5 %	Publica- tions 12 %	Presenta- tions 18 %	Others 25 %	Total
Consumers	4 %	-	3 %	-	5 %	12 %
Prospects	30 %	4 %	8 %	-	5 %	47 %
Trade	1 %	0,5 %	1 %	15 %	10 %	27,5 %
Prescriptors	-	0,5 %	-	-	5 %	5,5 %
Investors	-	-	-	3 %	-	3 %
TOTAL	40 %	5 %	12 %	18 %	25 %	100 %

<ul style="list-style-type: none">● SELLING A COUNTRY WAS CONSIDERED A RESPONSABILITY OF THE GOVERNMENT	<ul style="list-style-type: none">● COOPERATIVE MARKETING
<ul style="list-style-type: none">● EXPLOITING COMPARATIVE ADVANTAGES	<ul style="list-style-type: none">● CREATING COMPETITIVE ADVANTAGES
<ul style="list-style-type: none">● CONCENTRATING EFFORTS IN ADVERTISING (FOR PROSPECTS)	<ul style="list-style-type: none">● CONCENTRATING EFFORTS IN:<ul style="list-style-type: none">- QUALITY- RECOMMENDATION- REPEAT BUSINESS
<ul style="list-style-type: none">● FOCUSSING ON THE TRAVEL TRADE	<ul style="list-style-type: none">● DIRECT SALES

● "SMELL" MARKETING	● SCIENTIFIC MARKETING
● NON PROFESSIONALISM	● HIGH PROFESSIONALISM
● SMALL BUDGETS (0'1% REVENUES)	● BIG BUDGETS (2% REVENUES)

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