Analysis of Tourism
from
Germany to Poland
and
Marketing Strategy

for

PHARE Programme
THR - Barcelona

Prepared by:
Marketing Services International
Walter Stöhrer & Partner GmbH
Liebigstraße 8
D-6000 Frankfurt/Main 1
Tel.49-69-727770 Fax 49-69-727714

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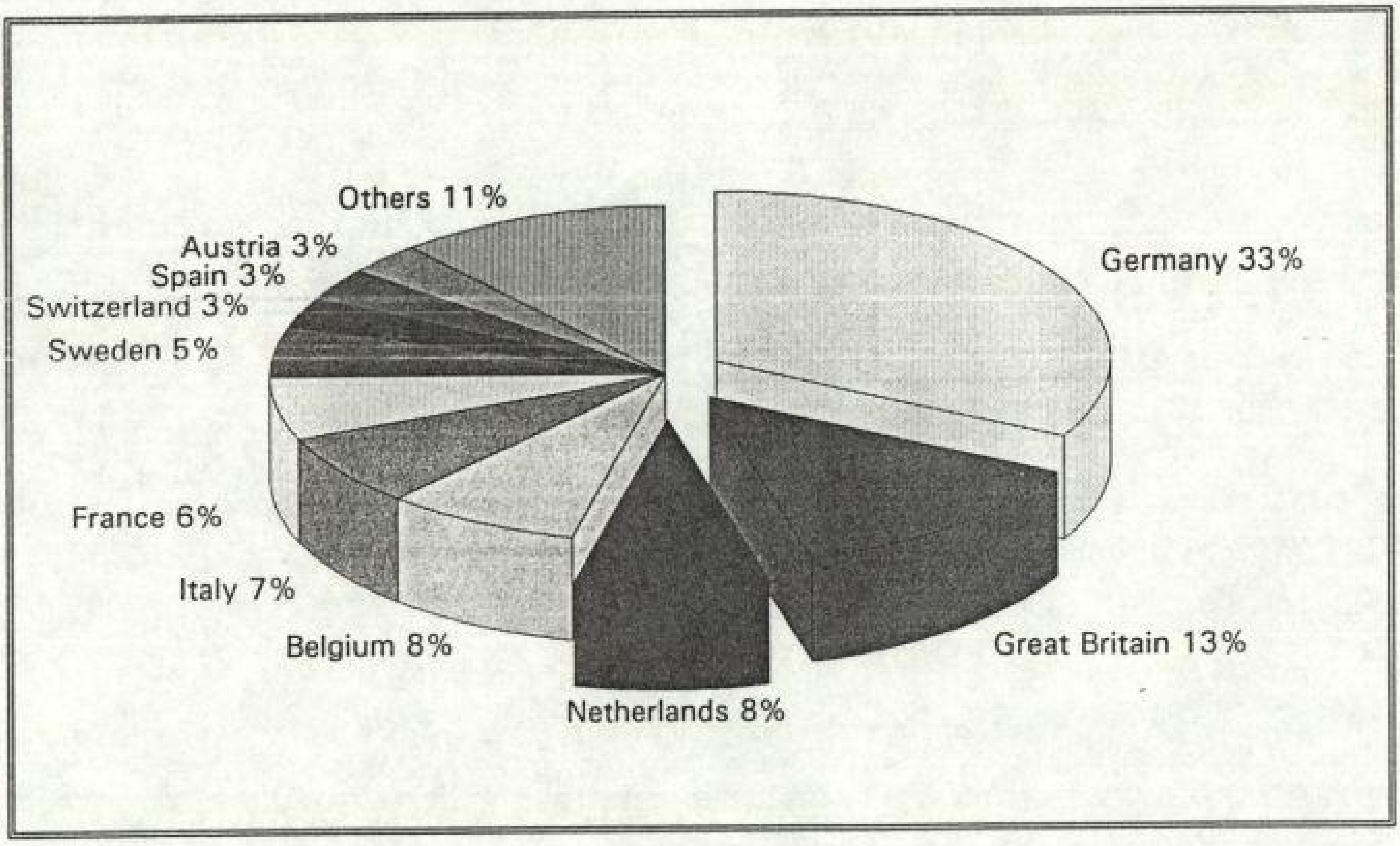
1. QUANTITATIVE ANALYSIS OF THE GERMAN TOURISM MARKET

1.1. Importance of the German Outbound Tourism Market

The European outbound travel market consisted of about 150 mill. trips made abroad (incl. business trips)in the beginning of the 1990's. Since one third were made by German travellers, the German outbound tourist market is the largest in Europe.

Fig. 1

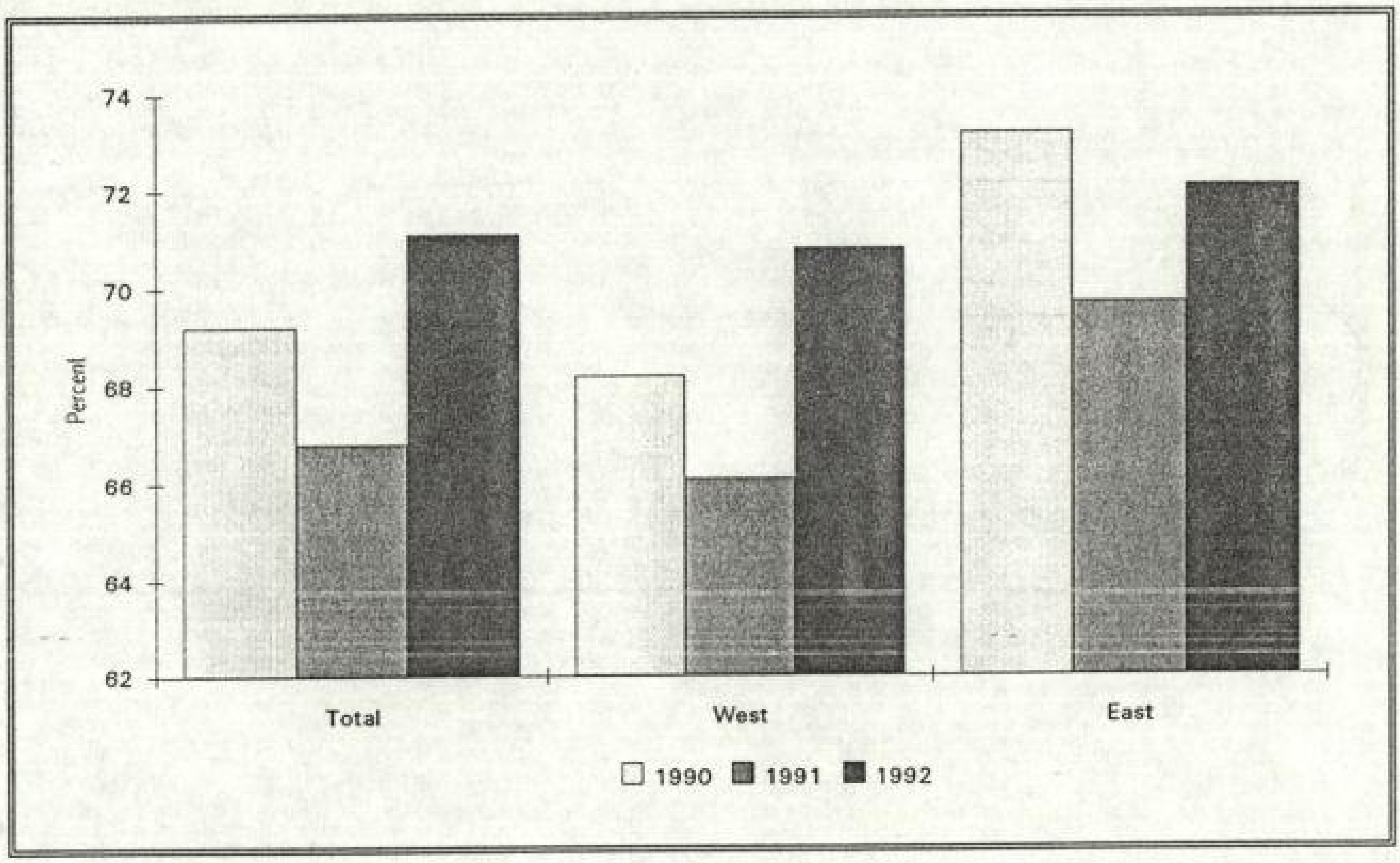


Source: Copenhagen Business School: Trends in German Outbound Tourism, Copenhagen 1991

1.2. Travel Propensity

In 1992, 44.7 mill. Germans over 14 years of age went on a holiday trip lasting five days or more - this means 3.2 mill. people more than 1991. So the travel propensity which declined slightly in 1991 due to the gulf war, increased by 4.3% to 71.1 %. The rise can be registered in Western as well as in Eastern Germany. In the New Federal States (NFS) the share of travellers in the total population rose from 1991=69.7 % to 1992=72.1% (9.6 mill.). Nevertheless, this increase cannot approach the figure of 1990 (73.2%), which was an exceptional year (first year of travel freedom) for East Germans.

Fig. 2



Source: StfT: Reiseanalyse 1990-92

1.3. Number of Vacation Trips

In the last year (1992) 55% of all Germans went on just one holiday trip lasting five days or more. The number of travellers who made two or more vacations increased in comparison to 1991. So the tendency is not only that the number of travellers grows steadily, but also the number of vacation trips they do per year increases.

number of trips (at least 5 days)	**1990**	**1991**	**1992**
one trip	55.2%	54.6%	**55.0%**
two trips	11.0%	9.4%	**12.8%**
three and more trips	3.1%	2.9%	**3.3%**
travel propensity	69.2%	66.8%	**71.1%**

Source: Starnberger Studienkreis für Tourismus (StfT): Reiseanalyse 1990-1992

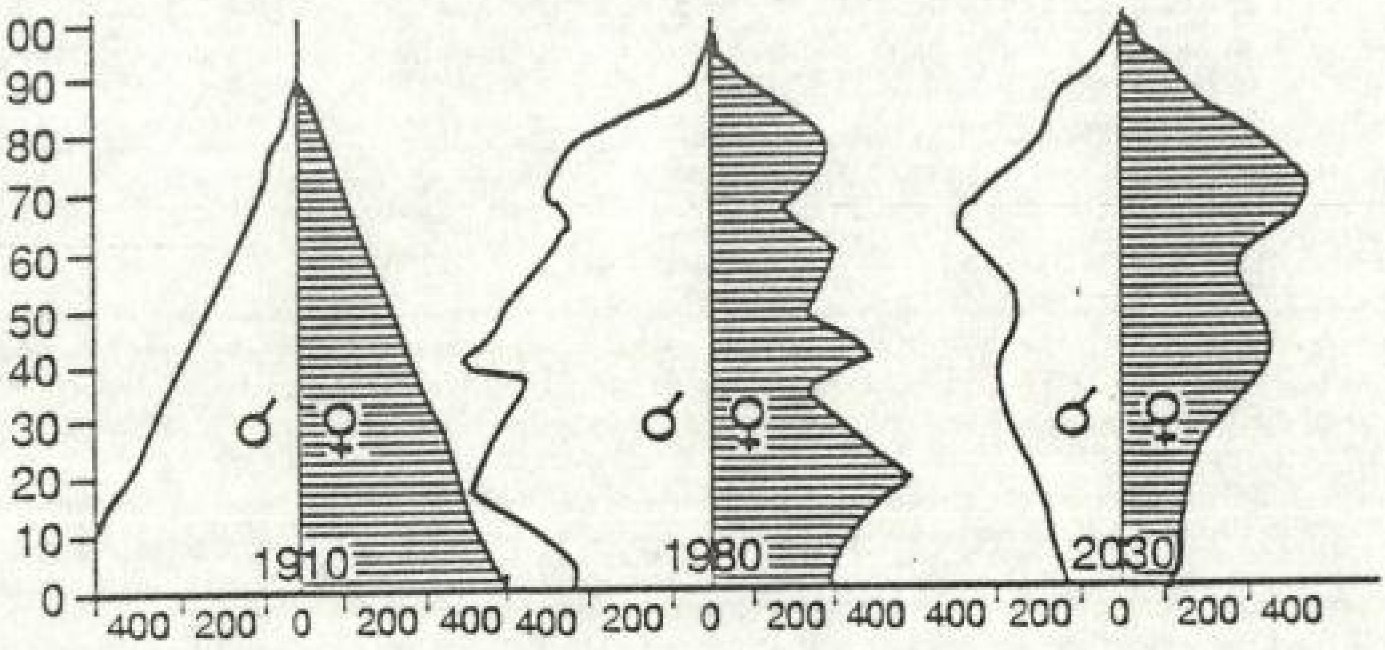
1.4. Socio-demographic structure

In 1992 65.6% of the total number of German holiday makers (29.3 mill) travelled abroad.

Persons venturing abroad on holiday tend to be young or middle aged. Among people over 60 interest in holidays abroad is less pronounced. However, the below-average foreign travel intensity of older persons should not lead to ignore the growth potentials in this group, as the number of foreign travellers aged over 60 has risen by 30% within a decade. Because of the age structure of the German population this target group will gain importance in the next few years. Whilst in the year 2000 the age group between 10 and 30 years will decrease to about two thirds compared to today, a large potential of 30 to 40 year olds will exist. This age group will increase by a quarter.

Fig. 3

Alteration in Age Structure of the German Population
- from 1910 to 2030 -



Age **1000 per Year of Age**

As many of those who are moving up into this age group are seasoned and skilled travellers, an increase in foreign travel intensity among older Germans is very likely.

The fact that large proportions of the population are well-educated and travel experienced raises foreign travel propensity, as much higher intensity is characteristic for persons with advanced level of education and in skilled jobs.

1.5. Destinations for main vacation trips

Since the late 1960s most of the (West-) German travellers prefer holiday abroad to vacation within Germany. In 1992 - in contrast to former years - where the majority chose to make holiday within Germany - most of the East German vacationers went on holiday abroad.

Spain, Italy and Austria are the leaders of the ranking list of destinations. Eastern European countries record a slight increase in intrest.

1.6. Organization of trip

In 1992, 57.8% of all German travellers preferred to organize their vacation themselves. This means a marked decrease to the previous years (1990 and 1991 ca. 63%). But even if the vacation is organized and planned individually 5% of those trips are supported with at least one service factor of a travel agency. In addition, one has to consider that these figures include domestic and outbound travel. Data of 1990 show that the form of organization depends on the destination - most domestic travellers organize their trip individually (87%); most vacationers who travel abroad prefer to book a package (52%). All available data concerning the type of travel differ just slightly between East and West Germany.

Type of Travel	**1990**	**1991**	**1992**
fully/partly organized (package)	37.0%	36.6%	42.2%
thereof:			
fully organized	28.5%	28.1%	32.9%
partly organized	8.5%	8.6%	9.4%
Arranged travel themselves	63.0%	63.3%	57.8%
thereof:			
completly self-organized	56.4%	57.4%	52.8%
support of travel agency	6.6%	6.0%	5.0%

Source: StfT Reiseanalyse 1990-92

1.7. Means of Transportation

The private car is still number one means of transportation for vacationers from both parts of Germany (East 60.5% / West 53.1%).
In 1992, there was again an increase in the number of journeys made by aeroplane. Although for vacationers from the New Federal States the journeys by coach are still more important than air transportation.
The most significant decline can be indicated concerning railway transportation, especially in the Eastern part of Germany.

Means of Transportation in %	**former FRG**			**fromer GDR**		
	90	**91**	**92**	**90**	**91**	**92**
private car (incl. caravan)	59.2	56.3	53.1	62.0	60.3	60.5
aeroplane	25.4	26.5	30.3	2.0	5.6	11.2
coach	8.0	7.8	8.2	7.9	19.8	19.1
railway	7.9	8.2	7.0	26.9	13.5	7.9

Source: StfT Reiseanalyse 1990-92

1.8. Accommodation

There is a broad variety of different types of accommodation tourists utilise during their main vacation trip. The preferences of the 'old' and the 'new' Germans are different. Concerning vacationers of the former FRG hotels with its various qualitities are on top of all possible kinds of accommodation (33.4%) followed by inns/boarding houses (18.4%) and rented holiday flats or houses (18.1%).
Opposite to these facts just 24.9% of vacationers of the former GDR preferred staying in hotels, 20.1% in rented holiday flats and houses followed by the remarkable amount of 18.2% who stayed with friends and relatives - although this trend declined over the last few years and the propensity for staying in hotels increased.

Type of Accommodation in %	former FRG 90	91	92	former GDR 90	91	92
hotel	30.7	31.6	33.4	10.8	19.8	24.9
inns/boarding houses	16.7	17.6	18.4	9.4	15.0	15.9
rented flat/house	16.6	15.2	18.1	13.1	14.1	20.1
friends/relatives	11.2	11.0	9.4	32.3	21.6	18.2
private accommodation	8.2	7.4	7.3	13.2	15.3	10.3
camping/caravan	8.1	10.0	9.4	9.5	7.1	6.1

Source: StfT Reiseanalyse 1990-92

1.9. Sources of Travel Information

The majority of German travellers get their information on their future destination through talks with friends and relatives. In Germany - unlike a lot of other countries - travel agencies are very important sources of information. Even if the travellers do not book their vacation there, more and more use travel agencies as consultants and brochure providers. Adding up informational talks and the purchase of brochures, travel agencies and tourist boards are even more important than any other sources of information.

Sources of Information

recommendations and reports of friends and relatives	38.7%
information and advices of travel agency or tourist board	20.0%
brochures of tour operators	19.3%
accommodation guides and brochure of region/country	12.5%
travel guide book	8.1%
travel reports in magazines and newspapers	7.1%
advertisement in magazines, newspapers and poster publicity	5.2%

Source: StfT: Reiseanalyse 1991

1.10. Moment of Decision

The decision for the main vacation trip is made mainly between January and May in the year of travel. But nevertheless approx. 30% of the German travellers are making up their decision in the year before the trip.

preceding year or earlier	**30.7%**
the year of travel	**69.3%**
thereof:	
January	14.2%
February	10.6%
March	9.3%
April	7.5%
May	10.7%

Source: StfT: Reiseanalyse 1991

2. QUALITATIVE ANALYSIS OF THE GERMAN TOURISM MARKET

At least as important as the quantitative development trends, however, are the qualitative trends that are shaping tourism demand. They will undoubtedly have a major influence on future tourism development in all potential destinations.

2.1 General Tendencies

Within the last few years German travellers developed a high sensitivity towards ecological problems. In 1985, just 29.9% realised those aspects whereas 1992 approx. 60% of the vacationers complained about environmental problems during their last holiday trip. A research in 1990 with the question "Which current events influence you in the choice of your holiday destination?" brought up a surprising listing of negative aspects: environmental problems are rated even higher than natural disasters and criminality.

Events	high influence*	no influence*
war, unrest	74%	5%
environmental problems	57%	6%
illness, disease	55%	7%
natural disasters	49%	11%
criminality	44%	9%

* several answers were possible
Source: Axel Springer Verlag (Ed.): Aspekte des Tourismus bis zum Jahr 2000, 1991

2.2. Conclusions

As German tourists are well experienced and on the other hand do have the possibility to choose from a wide range of destinations, the following factors are decisive to their choice of holiday destination:

* no mass tourism
  - Germans developed a high sensitivity against mass tourism
* sound environment
* sound cultural surrounding
* price - value for money
* positive attitude towards tourists in host country
  - tourists want to feel welcome not just because of their money
* quality in
  - transportation
  - accommodation
  - service
  - tourist infrastructure in general

3. GERMAN TOURISM IN POLAND

The general analysis of the German tourism market shows that there are in many aspects differences in the travel habits between East and West Germans. Unfortunately, the existing surveys or data mostly do not differentiate between those two groups.
A detailed market research analysis regarding German tourists in Poland would be necessary to concept a comprehensive strategy for tourism development.

3.1. Arrivals by Boarder Crossings

Since the late 1980s (the easing of entry restrictions; changing political situation) a steady increase in tourist arrivals from Germany could be recorded. Especially between 1991 and 1992 there was an enormous rise of nearly 10 mill. entries. However, one has to consider that the increase in entries does not necessarily mean a rise in overnight visitors.
According to estimates roughly 70% are just same day visitors. Interesting for Polish tourism industry - and the conception of a marketing strategy - are mainly overnight visitors.
The following list shows that arrivals of German visitors lead before those from former USSR and former Czecho-Slovakia.

Arrivals by Boarder Crossings (in thousands)*

Country	88	89	91	92
Total	6.195	8.232	36.845	49.000
Germany[1]	1.533	1.791	20.885	30.700
former Czecho-Sl.	1.417	1.502	6.101	8.260
former USSR	1.739	2.899	7.545	7.800
Romania	21	18	275	210
Austria	53	75	133	190
Hungary	567	698	179	190
Netherlands	45	56	159	180
Sweden	69	115	143	160
Great Britain	34	46	84	150
USA	57	96	124	130
Denmark	37	54	141	122

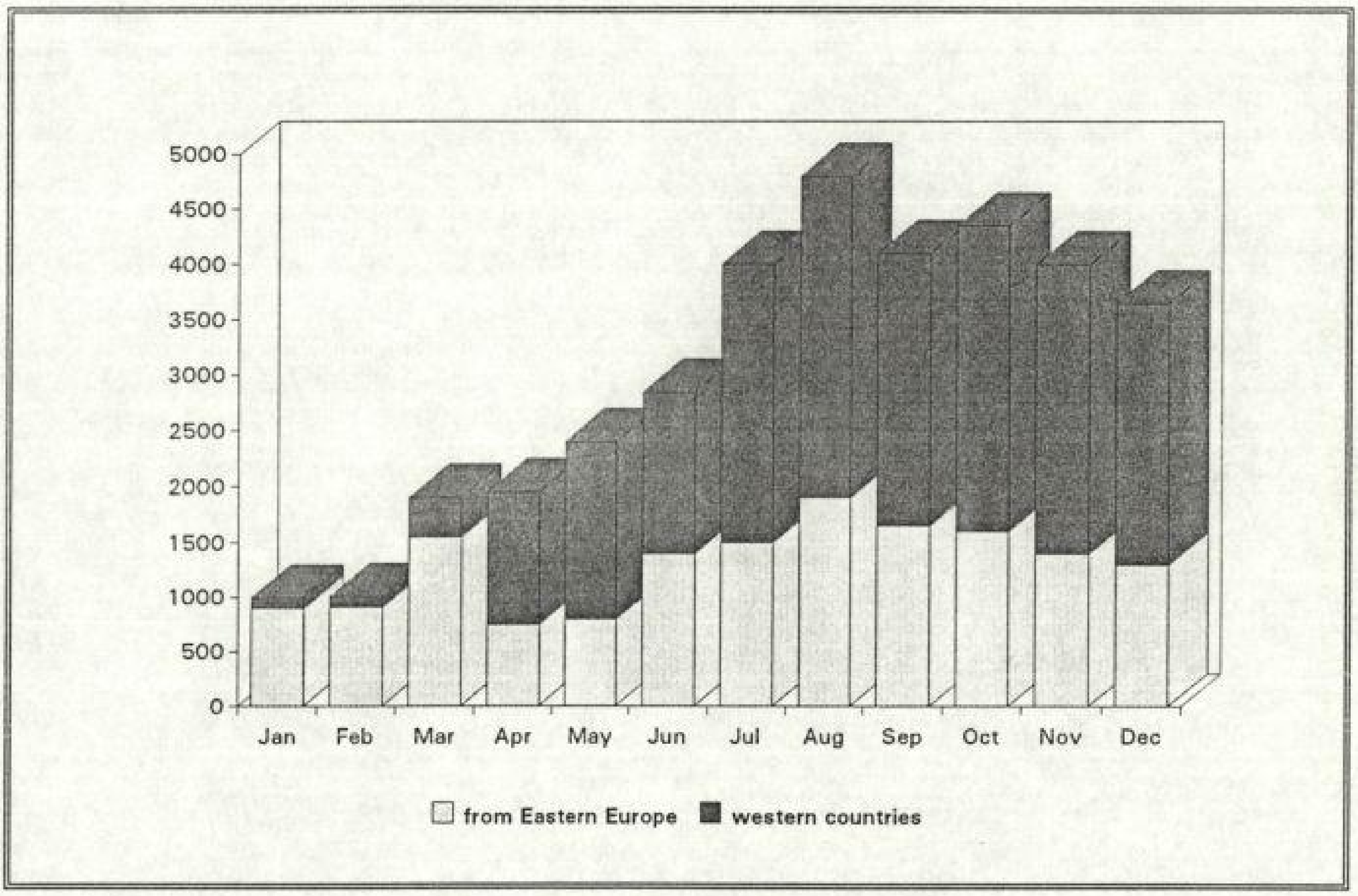
* for 1990 no detailed data - except the total amount of 18.210 entries - available
1) data for 1988/89 West-Berlin, East Germany and West Germany together

Source: Insitute of Tourism: Incoming Tourist Traffic in Poland in 1991; Warsaw 1991
World Travel Organization: Incoming Tourism to Poland in 1992, Madrid 1992

3.1.1. Seasonality

As there is no specific data available on seasonality of German tourism to Poland, one has to rely on data of month of arrival of Western countries in general. But regarding German tourists there are no extreme deviations expected.

Fig. 4

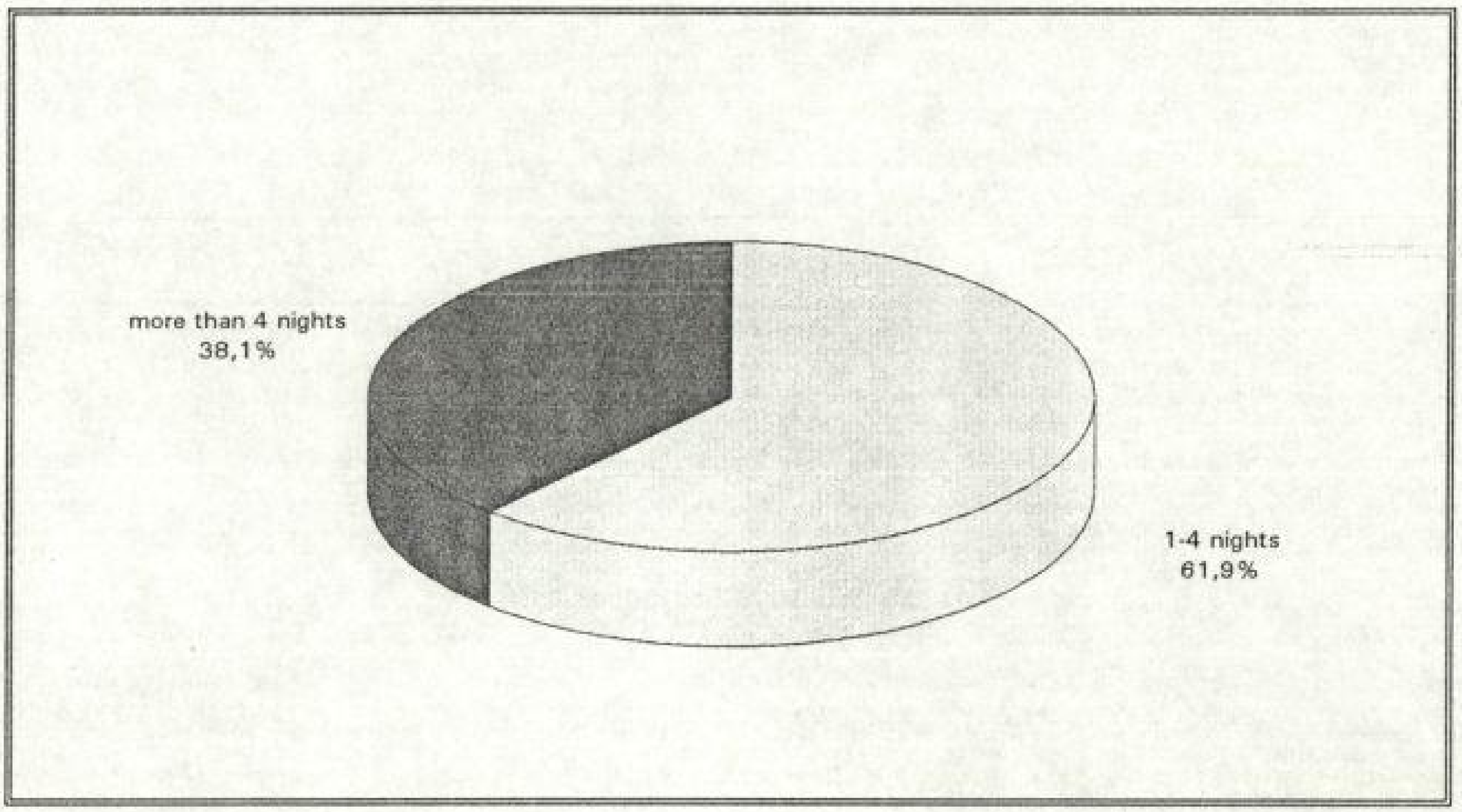


Source: Institute of Tourism: Incoming Tourist Traffic in Poland 1991, Warsaw 1992

3.2. Length of stay

Considering just overnight tourists the average length of stay of Germans in Poland is 5 days. Roughly 38% do stay more than 4 nights.

Fig. 5



Source: Institute of Tourism: German-Polish Tourism, Warsaw 1992

3.3. Organization of Trip

Regarding the form of organization of the journeys to Poland German tourists do show differing preferences to their normal attitude. Roughly 11% of all journeys are package tours (German average is approx. 42%). The majority of vacationers organize their stay individually with the following distinctive features:

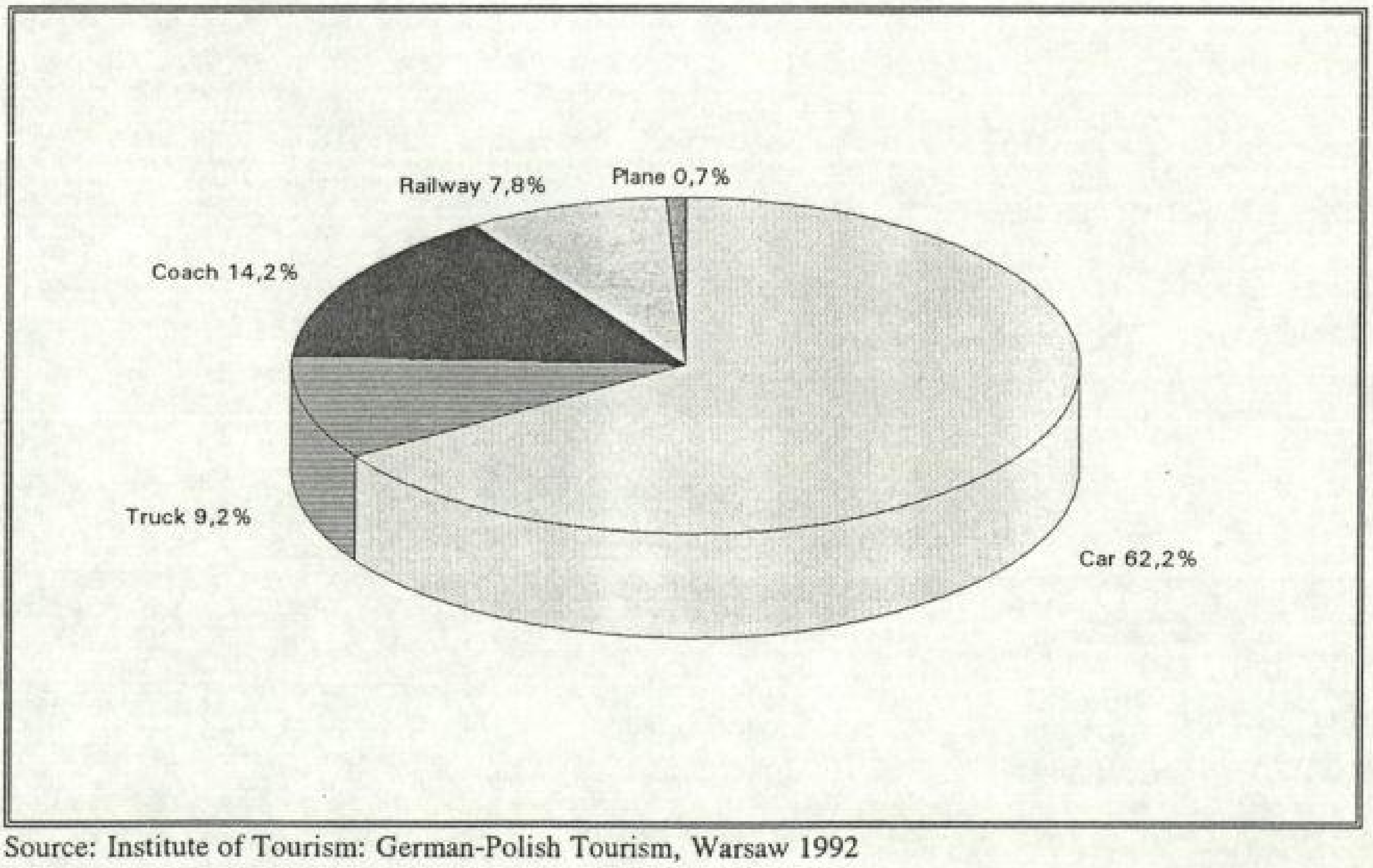
Type of travel	percentage of trips
fully/partly organized package tour	11.7%
totally individual	49.6%
individually, at invitation of persons	18.0%
individually, at invitation of institutions	11.5%
individually, but with support of travel agency	5.6%

Source: Institute of Tourism: German-Polish Tourism, Warsaw 1992

3.4. Means of Transportation

In accordance to the general German preferences the car (62.2%, truck 9.2%) is the most important means of transportation for trips to Poland. Also the percentage of railway travellers correspond to the German average (7.8%). The journeys made by plane are extremely below average.

Fig. 6



Source: Institute of Tourism: German-Polish Tourism, Warsaw 1992

3.5. Accommodation

The most common type of accommodation for German tourists are hotels (36.5%) followed by stays with friends and relatives (23.0%) and private accommodation or boarding houses (14.3%). Camping tourists are with 5.6% of minor importance. Unfortunately, other types are not sufficiently differentiated; it would be interesting to get detailed data on rented flats or houses as this is normally a very popular type of accommodation for Germans.

Types of Accommodation	percentage of Germans in Poland
hotels	36.5%
friends and relatives	23.0%
private acc./boarding houses	14.3%
camping	5.6%
others	20.6%

Source: Insitute of Tourism: German-Polish Tourism, Warsaw 1992

3.6. Expenses

The average expenses of German tourists are not as high as the ones of other Western countries. One reason could be the minor amount Germans spend for accommodation, as a high percentage of vacationers do stay with friends and relatives. Another factor which minimizes the average is the fact that most German visitors do not stay overnight.

Expenditures of Foreign Tourists in Poland 1991

Country	Average Expenditures per Person (in thousands zlotys)
Total	**2.676**
Italy	4.320
Great Britain	3.871
Belgium	3.602
USA	2.083
Germany	1.883
Denmark	1.878
France	1.788
Sweden	1.408

Source: Institute of Tourism: Foreign Tourist Expenses in Poland, Warsaw 1991

3.7. Purpose of Visit

The main purposes of Germans overnight tourists are shopping and visiting friends and relatives (high percentage of visitors of Polish origin). A survey where the interviewees could choose several answers shows following results:

Purpose of trip	Percentage of Answers
shopping*	34.9%
visiting friends/relatives	31.5%
business	25.9%
holiday/entertainment	25.4%
visiting place of origin	15.8%
getting to know country and culture	15.2%
religeous reasons	5.3%

* mainly visitors from East Germany

Source: Insitute of Tourism: German-Polish Tourism, Warsaw 1992

3.8. Negative Aspects of Travel and Stay in Poland

The most critizised aspects for German tourists is the level of sanitary facilities and the low standard of services. Due to the fact that several surveys questioned tourists concerning their negative experiences in Poland, no homogenous data or results are available. But the following list tries to give the average ranking:

Negative Aspects:

1. low level of sanitary facilities
2. low quality of tourist services
3. insufficient tourist information
4. troublesome travelling/low standard of transport infrastructure
5. difficulties in organizing the trip
6. high cost of stay
7. lack of tourist attractions

4. MARKETING STRATEGIES

There are some basic requirements which have to be fulfilled before any concrete and specified marketing activities can be carried out. On one hand the touristic 'product' has to be shaped and improved to the expectations of German visitors and on the other hand a comprehensive market research study should help to work out a detailed market segmentation and also to plan promotion activities. There are measures to be taken in Poland as well as in Germany.

4.1. Measures to be taken in Poland

First of all, the main structure of the Polish travel industry (private sector) should be altered to reach a strict separation of commercial activities and the neutral functions of a national tourist board (public sector).

4.1.1. Poolings and Cooperations

The Polish travel agency structure has to be reformed. The large amount of small travel agencies which often do just offer one or very few hotels or pensions cannot fulfill international sales requirements, because it is not at all fit for the necessary automation of information, reservations and sales. Therefore, those small agencies of one region have to cooperate with each other. Only such a pooling would enable them to take part in an international computer reservation network.

4.1.2. Computerization

The need of telecommunication facilities leads to another major problem of the Polish travel infrastructure. For getting in connection with international computer reservation systems the Polish telecommunication network has to be modernized and improved. The service providers (private sector) must be able to communicate via computer networks not only within Poland, but also with international travel organizations. This is the only way to ensure the maximum possible distribution.

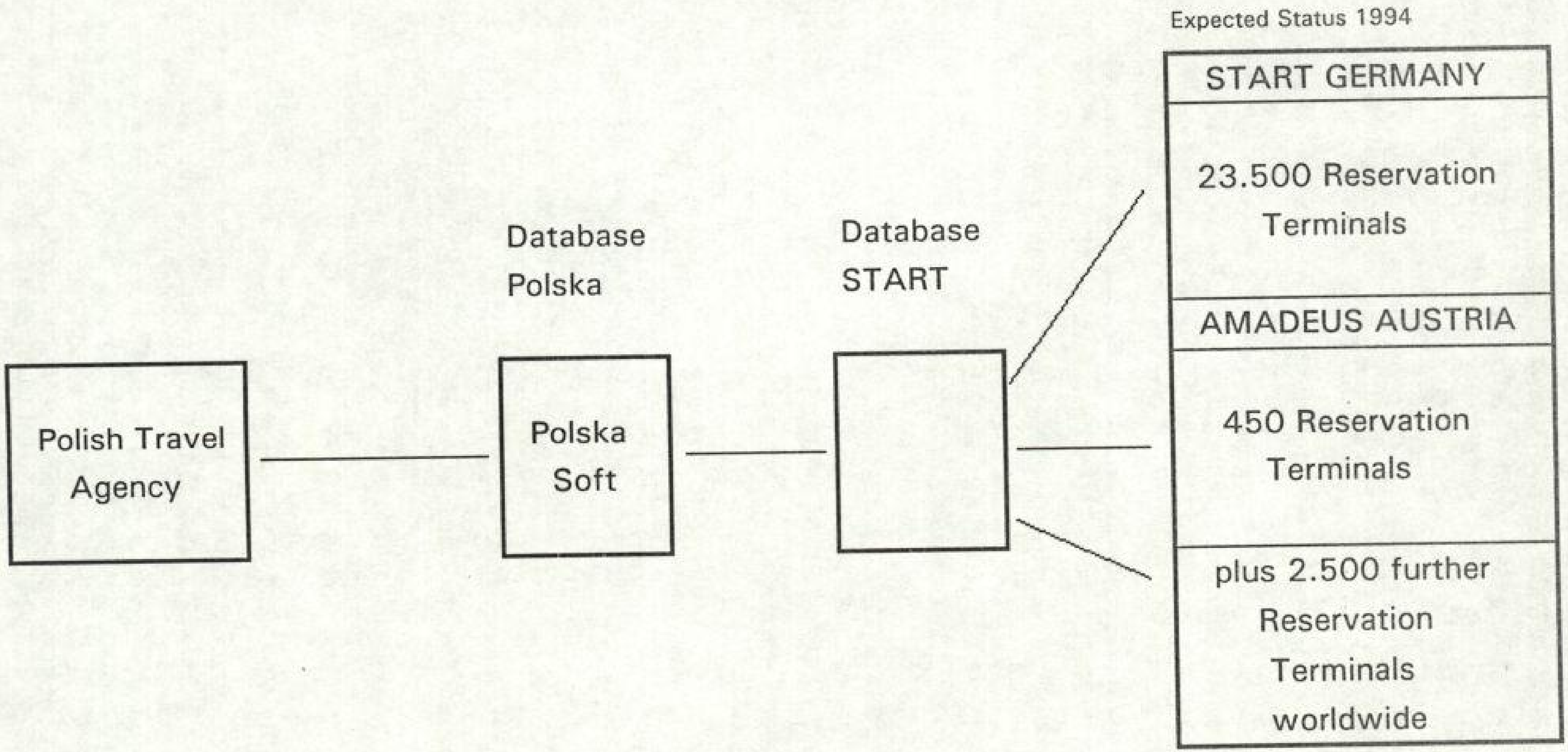
In Germany the most unique information and reservation network in travel trade is START. Via START-Btx travel agencies *and* private households can be reached. START also features other central information and reservation systems like AMADEUS and GALILEO.

The new "START POLSKA" company should not only serve the information needs of the public sector, but also the communication needs of the private sector and should not be limited to 1 or 2 organizations.

An international distribution of Polish travel products through "START-Polska" is shown in the following illustration:

International Distribution of Polish Travel Product

Fig. 7



DATABASE POLSKA

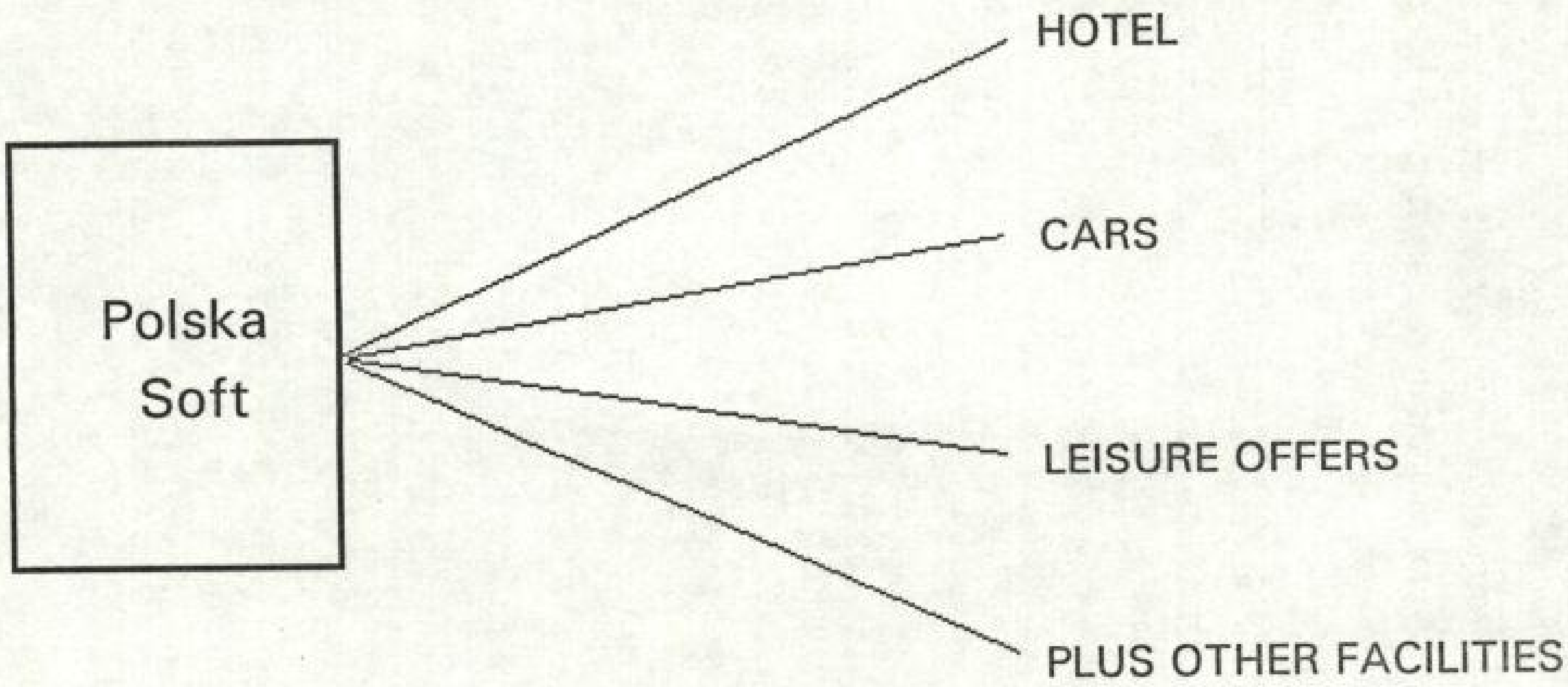


Fig. 8

4.1.3. Improvement of Tourist Infrastructure and Standards

One major task is to shape the touristic destination 'Poland' to a standard that can be accepted by the well experienced German travellers (and of corse all other Western tourists).
First the aspects which are mentioned in chapter 3 should be improved.
To improve the quality of tourist services and infrastructure four major measures should be taken:

a. Investments to modernize touristic infrastructure or facilities should be supported and promoted. This includes for example the transportation system as a whole, sanitary facilities and the telecommunication system.

b. To improve the standard of the qualitiy of touristic services the personnel in hotels and other organizations that are involved in tourism industry should be educated adequatly. The employees as well as the Polish population has to be motivated to create a positive attitude towards tourists, because German experienced travellers are very sensitive and will otherwise realize soon that not they themselves are liked, but only their money.
These facts - if complaints are taken up by mass media - could easily lead into a serious problem as already proved in the past. It should be kept in mind, that one of the most important motives of travelling abroad is getting to know the culture - which also includes the people - of the host country.

c. Another measure to ensure a certain quality level which can be internationally competitive is to categorize accommodation facilities and tourist infrastructure according to international organizations like the WTO.

d. The Polish service providers have to familiarize with the German travel law and the consumer protecting law to avoid negative publicity in the German market, which can be created through legal disputes between tourists and Polish service providers. Another basic requirement for continued growth and a positive image is price discipline on the part of the suppliers.

All above mentioned measures as well as the new tourism conception must be brought into line with the general tendencies in the German market. This means the high sensitivity of Germans regarding environmental aspects and mass tourism has to be considered in all improvement projects.

4.1.4. Definition of Regions

In order to work out a detailed development plan it is advisable to define regions of similar attractions, landscape or tourism infrastructure. Thereby investments can be planned and financed commonly. Joint activities for improving the tourism infrastructure as well as promoting the region on international markets can be carried out with more success. Especially in foreign markets it is important to relate local attractions to larger and well-known regions.

4.2. Measures to be taken in Germany

4.2.1. Market Research

First step would be to conduct a comprehensive market research study on German tourists who visited or intend to visit Poland. The presently data availabel are insufficient in order to work out a complete marketing strategy. A detailed market segmentation is only possible if a wide range of aspects are sufficiently analysed .

4.2.2. Separation of Commercial and Non-commercial Functions

Strict separation of commercial agencies on one hand and the functions of non-commercial, neutral national and regional tourist boards is another basic requirement. As long as these two parts are not separated, a considerable part of the German travel trade could refuse to work with this organization, as the neutral function is not credible to them and they could look at it as a competitor.

4.2.3. Activities in Travel Trade

The German travel market is tour operator oriented - unlike a lot of other countries which are retail oriented. Foreign national information offices are usually located just in one city, whereas well equiped travel agencies are widely spread throughout Germany. They offer a wide range of brochures of tour operators and tourist boards and have access to computerized information systems. Travellers collect their information there even if they do not book their journey in these travel agencies.

So the travel trade (agencies and operators) also takes over the functions of information offices. Therefore, marketing strategies should not only consider campaigns in public media, but must also - as a very important factor - include activities in the travel trade.

Consequently travel agencies should be provided with printed material and information through START or similar network systems. The travel agencies should also be able to make reservations via START as German clients are used to get a written confirmation of the booking right away.

As many products as possible should be distributed through tour operators. This has a multiplier effect as the tour operator brochures are available in thousands of travel agencies throughout Germany.

5. PROPOSAL OF AN ACTION PLAN FOR PROMOTION AND ADVERTISING

5.1. Promotion Activities

Framework: For the consequent promotion of the destination POLAND and the positioning of its holiday regions as "prime holiday destinations" it is necessary to strengthen the efforts and to start a professional representation in the market as point of contact for the consumer and trade (tour operators and travel agencies) and for the media on behalf of the Government of Poland.

The main tasks of a national information office are:

- answer and handle all requests received from consumers and the travel trade.

- to start the contact to the tour operators to get them to increase or include POLAND in their offer and use the new image.

- distribution of brochures and material from POLAND and those which are produced as part of this project, to consumers, institutions, and the travel industry.

- monitoring the effectivity and documentation of the measures taken for this promotion.

5.1.1. Press Office/Press Service

Framework: Continuous contact to the press (press office)
A regular contact both personally and by telephone to the editorial offices to increase awareness and acceptance must be started. Handling of enquiries from the editorial offices, arranging contacts, making photographs available, clipping service, monitoring the results.

A regular press service directed to the important editorial offices in the print and electronic media. Monthly press releases of special journalistic texts on specific themes from POLAND's holiday areas, for example information about new products (hotels, holiday villages) artistic and cultural programmes, local events, gastronomy and repeatedly about infrastructural and environmental activities. The texts should be regularly supported with black + white photographs and the relevant captions.

5.1.2. Additional PR Activities

Press Conferences

Framework: Press conferences shall probably be held in Berlin, Frankfurt, Hamburg or other major German cities in order to stimulate and produce positive reporting about POLAND.

Press Invitations

Framework: Several press tours should be organized. Well-known travel journalists from press, radio and television should be invited. The media include leading German newspapers as well as news agencies (dpa and ADN) and important radio stations.

Some different tours for the trade press, who should then write for the travel agency front staff.

Photo Service

Two photo-libraries:
Setting up of two photo-libraries, one black and white with approx. 100 selected photos and one coloured with approx. 250 selected colour slides out of existing photo archives.

The photo-libraries are available to the press and tourism producers free of charge. Pictures which correspond to and satisfy the needs of the market play an important part in image building.

Photo shoots:
POLAND should be "seen" by German photographers with German eyes who produce for German consumers. Photo-designers who have been specially trained in this area, will achieve pictures which correspond exactly to the standards required by the German tour operators and consumer taste. The resultant pictures (colour slides and black + white) will be included and continually updated in the photo-libraries.

5.1.3. Sales Promotion Activities

In addition to the In-Market Representation and PR activities we suggest various supporting measures at the point of sale. By way of these measures, we reach consumers as well as sales staff.

CONSUMER PROMOTIONS

POLAND News

Framework: The multi-coloured topical newspaper informs about the holiday regions of POLAND and its diversity, current themes from culture, sports and tourism. Entertainment, interviews, special offers, information etc. will be prepared in an entertaining style and be available for readers who are interested in POLAND.

POLAND News should be placed at travel agencies and sent to potential travellers. The more people know about a travel destination the more likely they overcome fears to travel there. Tourists who already know POLAND and its holiday destinations will be repeatedly informed about the latest news and through this contact should be induced to come again.

Distribution of the "POLAND News" can be made

a. Through the top travel agencies
b. Servicing the regular requests received by the tourist office and the coupon replies to advertising campaigns.
c. Through direct-mail activities to potential travellers who have a certain affinity with POLAND.

Example for a specific Promotion Tool:

"URLAUBSTIP magazine POLAND"

Framework: In order to achieve maximum efficiency to publicise the image of POLAND the cooperation with an additional advertising carrier with high contact rates is advisable. URLAUBSTIP magazine fulfills these requirements, since it is spread with a base circulation of 195.000 copies through subscribers and subscriber-circles. The range of subscriber circle-folders is 22,5 %, equalling 11,103 million recipients in the Federal Republic of Germany.

For example a 16-page URLAUBSTIP Special with a reply coupon for requesting information and entering a POLAND competition can be designed. The Special conveys the fascination of POLAND through live and photographic reports, also presenting concrete information on the touristic infrastructure.

Additional value:

A postcard could be attached which is designed according to the corporate identity of POLAND with which the reader can order additional information through the channels of the document mailing service and is enabled to participate in the prize contest. The customer addresses are then available for future activities.

SALES PROMOTION ACTIVITIES TO TOUR OPERATOR/TRAVEL AGENTS

Product development/Product design:

First step of all activities is to create the right product for the German end-consumers and the right product design for the tourist industry as mentioned before.

Framework: Stimulation of tour operators to include POLAND products in their future package programmes.

Familiarization trips and workshops to POLAND for tour operators for recreational, cultural, study and sports tours, holiday apartment leasers etc., who are to learn about the product at its origin. These operators will then also intensify offers and advertise POLAND products in their catalogues.

Educational familiarization trips:
To improve the awareness of the tourism variety of POLAND and the knowledge about the products educational familiarization trips for groups of booking clerks of leading travel agencies in cooperation with transportation companies, tour operators, hotels and other service providers are suggested.

WORKSHOPS IN GERMANY

The information office should arrange workshops to which preeminent regional tourism service providers should be invited to visit various German cities, introducing their products from POLAND to travel agents and regional tour operators.

5.1.4. Advertising

CONSUMER-ADVERTISEMENT CAMPAIGN

Framework: Depending on the budget a professional media plan should be produced ensuring maximum effectivity for POLAND and its touristic regions. To effect a positive image transfer, the image of each title should be taken into account. To enhance the feedback and to facilitate requests for information, the advertisements should feature an answer coupon.

TRADE ADVERTISING

Since travel agents' sales staff have a significant influence on the holiday decision of the consumers, it is imperative to include them as multipliers into the communication. A continuous dialoge has therefore to be held between POLAND and travel agents / tour operators.

NEWSLETTER

Framework: In order to inform the travel agents as directly and exhaustively as possible, a Newsletter should be compiled three times a year which will be distributed as a supplement to trade magazines. The Newsletter as an addition to POLAND News will deal with the following subjects:

- General information about the country
- The country's infrastructural and environmental activities
- Price levels in POLAND
- Tour analyses
- Information on forthcoming advertising and promotion activities
- Reports on POLAND
- Tour operator news
- Diary (cultural, sports events etc.)
- Touristic statistics of POLAND

REMARKS

All the suggested activities have been developed in cooperation with well-known professionals who have experience in the following sectors: tourism marketing, tour operating, retail travel agencies and sales promotion as well as public relations and scientific tourism research.

Market introduction is conceived in such a way that it can be continued over into the next years and can be supplemented in the German speaking countries through long-term strategies in order to satisfy the requirements for achieving the necessary change of direction.

Frankfurt, 13th April, 1993