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ROZWÓJ TURYSTYKI W POLSCE

TOURISM DEVELOPMENT IN POLAND

MARKET RESEARCH: INPUT FOR THE DEVELOPMENT AND MARKETING OF POLAND'S TOURISM PRODUCT

Part I: The European & Domestic Market

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WORKING PAPER

MARKET RESEARCH: INPUT FOR THE DEVELOPMENT AND MARKETING OF POLAND'S TOURISM PRODUCT

Part I: The European & Domestic Market

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Introduction

Broadly speaking tourism consists of three categories of travel:

- pleasure travel, recreational travel, or holiday travel;
- business travel; and
- travel for other reasons, such as visiting friends and relatives (VFR), education, or religion (pilgrimages).

On a worldscale about 70% of all tourism consists of holiday travel. The remaining 30% are about equally divided between business travel and travel for other reasons. Arrivals in Europe generally conform to this world picture.

Recreational travel is governed by a range of factors, such as income, free time and motives. These are dealt with below.

Business travel is dependent upon trade- and aid-contacts. As such its volume, except for conventions, cannot be influenced by marketing efforts. In up-market business travel, competition is largely confined to that between operators of passenger transportation and up-market hotels in national and regional capitals. Marketing activities of up-market hotels are consequently directed at travel agencies catering for the business traveller and in-house company or aid organisation travel agencies. In down-market business travel, marketing efforts are largely confined to those of low budget hotel chains.

In the third category of tourism, VFR is dependent upon the size of the diaspora and the expatriate community. Marketing efforts are limited to offering special rates in transportation. Travel for educational and for religious reasons on the other hand does respond to promotion in as much as holiday travel does. It will hereafter therefore be considered to be part of holiday travel.

The aim of this paper is to outline what factors determine the demand for holiday travel and what implications the generic characteristics of demand have for the specific demand for tourism products offered in Poland.

Ability and Willingness to Travel

Demand for holiday travel is determined by both material and non material factors.
Material factors such as discretionary income (free disposable income) and discretionary time (leisure) determine the ability to exercise a demand for recreational travel. In their absence there can be no effective demand but only latent demand.

Non material factors constituting a felt need to travel determine the willingness to buy tourism goods and services. In the absence of a felt need even latent demand does not exist. Together the existence of material and non material factors results in effective holiday demand.

Apart from discretionary income and discretionary time the **ability** to exercise a demand for holiday travel depends on holiday prices and the availability of an adequate supply of tourist goods and services (the tourism product). High prices imply that a high discretionary income is needed in order to be able to travel. A decrease in holiday prices encourages more consumers to go on holiday.

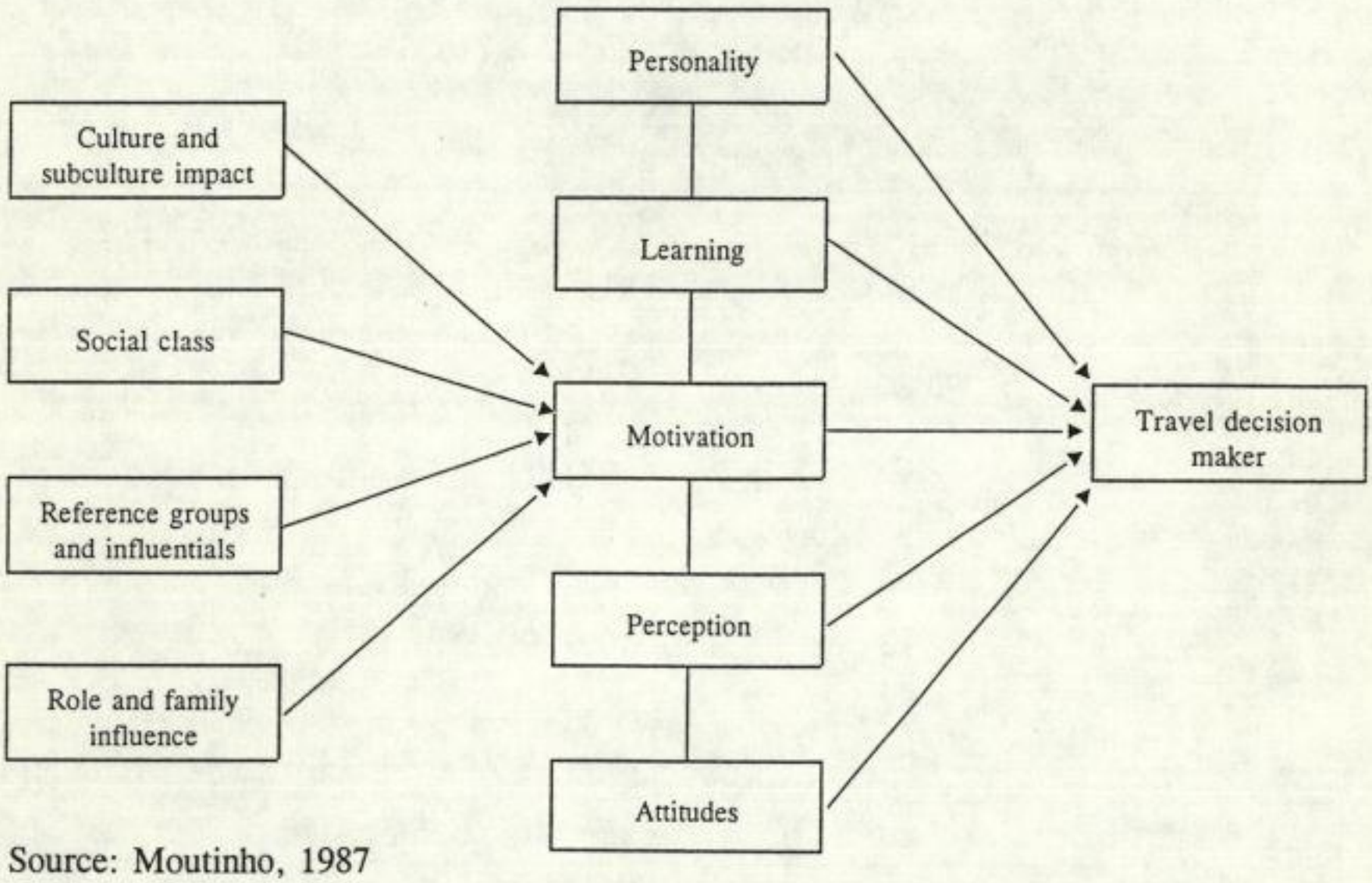
The range of goods and services on offer in the market (the product assortment) provides the range of choices available to the consumer. It should be clear that not only goods and services offered by business outlets have a bearing on the range of choices available to the public at large, but also those produced , and often made available without cost, by public authorities. For instance road infrastructure is needed to enable the conversion of latent demand for road transport services into effective demand. Inadequate road infrastructure will either prevent or limit the demand for road travel, both in general and for holiday purposes. The quality of roads has an influence on both travel time and vehicle operating costs (VOC). Both have an impact on the competitive position of holiday destinations. Similarly without appropriate attractions the provision of food and lodging facilities is pointless, except perhaps for transit tourists and business travellers. Poor accessiblity or improper management of attractions will affect both the size and quality of holiday demand.

The **willingness** to buy a holiday experience depends on non material factors leading to a felt need for the benefits to be derived from such experience. Holiday wishes represent an element in a set of preferences, which is governed by psychological and social variables such as individual motivation and perception, reference groups, learning processes and attitudes, and push factors in the work and home environment constituting a need for periodic escape or counterbalance. Leaving aside the push factors in the home and work environment the interaction can be depicted as in Figure 1.

Psychographic or lifestyle segmentation tries to classify groups of consumers according to the relative value of these variables. It should be emphasized that such segments are rather unstable constructs. The consumer's affiliation to a holiday segment may change and the segment itself may be unpredictably eroded by changes in the set of preferences resulting from opinion moulding by the media and technological innovation. Technological innovation may lead to a whole range of new products which may have a significant bearing on lifestyles.

Bounded rationality is a further factor limiting the value of lifestyle segmentation. It means that, even if there is full market transparency, consumers, as pointed out by Simon (Bartel, 1986) sometimes take decisions quite independently of the cost/benefit ratio which they can calculate. The influence of framing, the way a problem is presented, can affect choice substantially (Herrnstein and Mazur, 1987). This makes consumer choice susceptible to "manipulation" by promotion.

FIGURE 1. Major Influences on Individual Travel Behaviour



Source: Moutinho, 1987

While the "impetus dimension" of the demand for holidays indicates the difficult to influence generic element of felt need, the "directive dimension" indicates the specific where and how the demand responding to the felt need will be exercised (Crompton, 1979). Marketing and promotion aim at this "directive dimension" of demand. In order to be able to do so effectively information is needed on both the "impetus dimension" and the ability to exercise a demand for holiday travel. Of foremost importance is to know where the ability to travel exists, in which countries (for big countries also in which part of the country), and in what socio-economic and demographic segments of the population. The next step is to evaluate the distance factor which not only has a bearing on travel time and travel costs but also on the intervening opportunities. Intervening opportunities consist of similar product offers at a similar or lesser distance from the market to be tapped. A subsequent analysis of holiday

preferences in potential origin markets may provide guidance as to the tourism products to be developed.

Time, money and mobility

Travel implies spending time and money, and bridging geographical distances. Further to travel organisation is needed. The relative importance of these variables varies according to the type of travel. For instance, in alternative long haul youth tourism or drifter tourism little organisation is needed and a trade-off between time and money is practiced compared to conventional long haul tourism. By investing time money is saved. For those who have little money relative to time it makes sense to choose relatively slow but inexpensive modes of transportation such as trains and buses. Growing incomes in a situation of constant and relatively scarce free time on the other hand lead to an increasing use of relatively fast but expensive means of transportation such as private cars and planes. Growing incomes, moreover, lead to an increase in non-work related mobility, both in terms of distances covered and number of trips taken (Vickerman, 1975). In holiday travel the relation between level of income and degree of mobility manifests itself in higher net and gross holiday intensities and in larger distances traveled. Holiday participation or net holiday intensity indicates the percentage of the population taking at least one holiday per year. Gross holiday intensity measures the total number of holidays taken by the population.
The relation between income and holiday participation for Belgium, the Federal Republic of Germany and Switzerland is shown in Table 1.
The same relationship also applies to country averages: the lower the level of wealth as measured by per capita income the lower in general the holiday participation. This is shown for the twelve EC countries in Figure 2.

This implies that in choosing geographic target markets not population size per se or even economic size as measured by GDP but wealth as measured by GDP per capita is the decisive factor to look for. The disparities in economic size and wealth are for the world's twelve biggest economies illustrated in Figure 3.
Geographic disparities in wealth exist not only between countries but also between regions within countries. In Italy for instance the 1990 GDP per capita in the northern Lombardia province is more than 130 % of the average for the whole country, whereas in the southern provinces of Calabria, Campania, Basilicata and Sicily it is only 50 to 70 % (Leick and Von Roques, 1993). In Germany the 1990 GDP per capita in Hamburg is above 150 % and in Bremen above 125 % of the average for the whole of Western Germany (The Economist, 1993). The implication is that in choosing geographic target markets not only countries but also regions should be selected.

TABLE 1. Family income and holiday participation in Belgium, the Federal Republic of Germany and Switzerland

Belgium	(1982)	FRG	(1980)	Switzerland	(1980)
Family income in 1000 BF per month	Holiday participation in %	Net family income in DM per month	Holiday participation in %	Net family income in Sw.frs per month	Holiday participation in %
< 20	19.5	< 1000	32.7	< 1200	46
20-30	27.8	1000-1500	36.5	1200-1800	56
30-40	44.3	1500-2000	48.7	1800-2600	68
40-50	51.6	2000-2500	57.4	2600-3400	74
50-70	67.9	2500-3000	63.9	3400-4200	77
70-90	72.2	3000-3500	67.3	4200-5000	81
> 90	75.7	> 3500	76.3	5000-6500	83
				6500-8000	88
				> 8000	87

Source: Boerjan, De Keyser, Vanhove, 1984; Baretje, 1981a and 1981b

FIGURE 3.

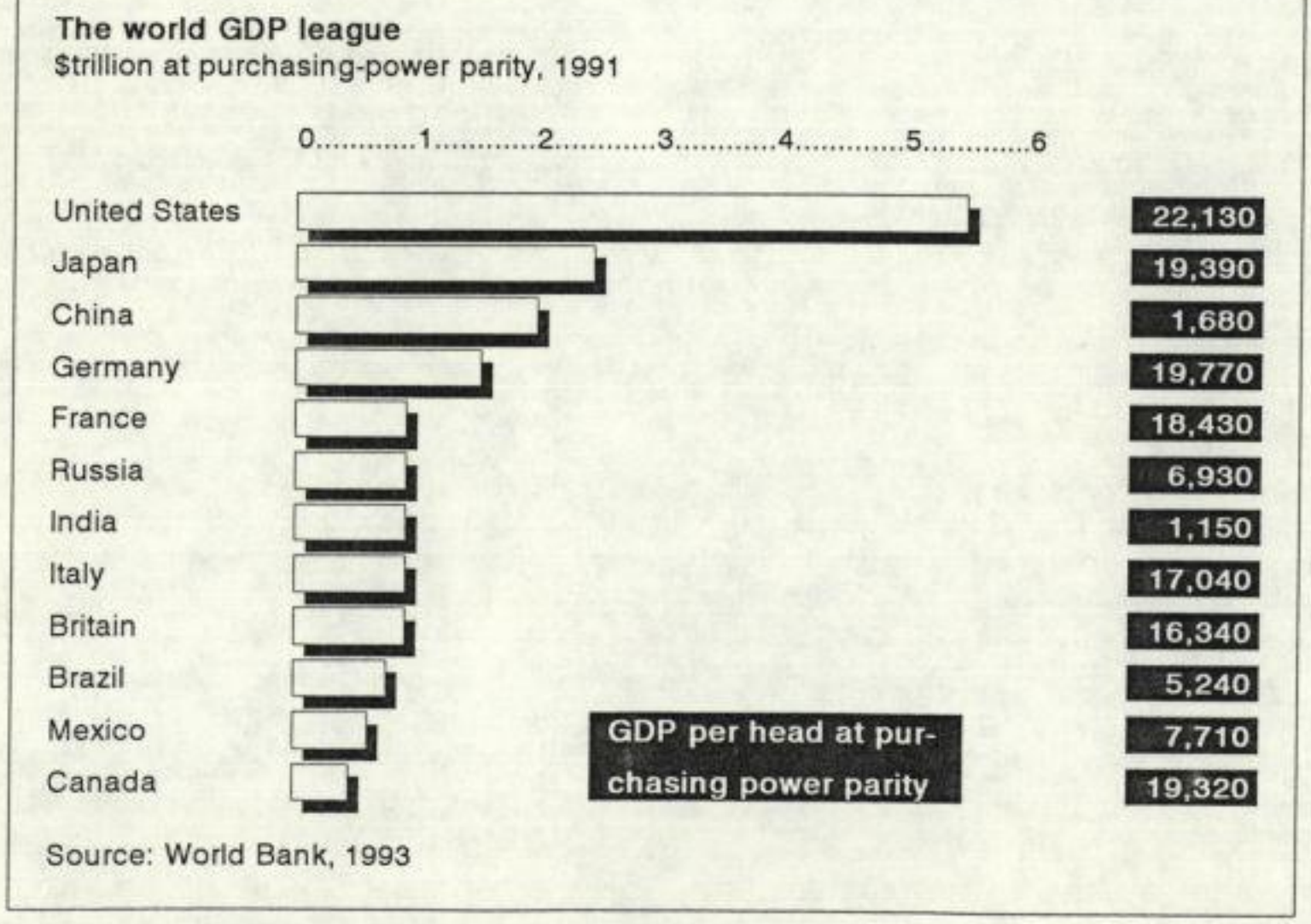
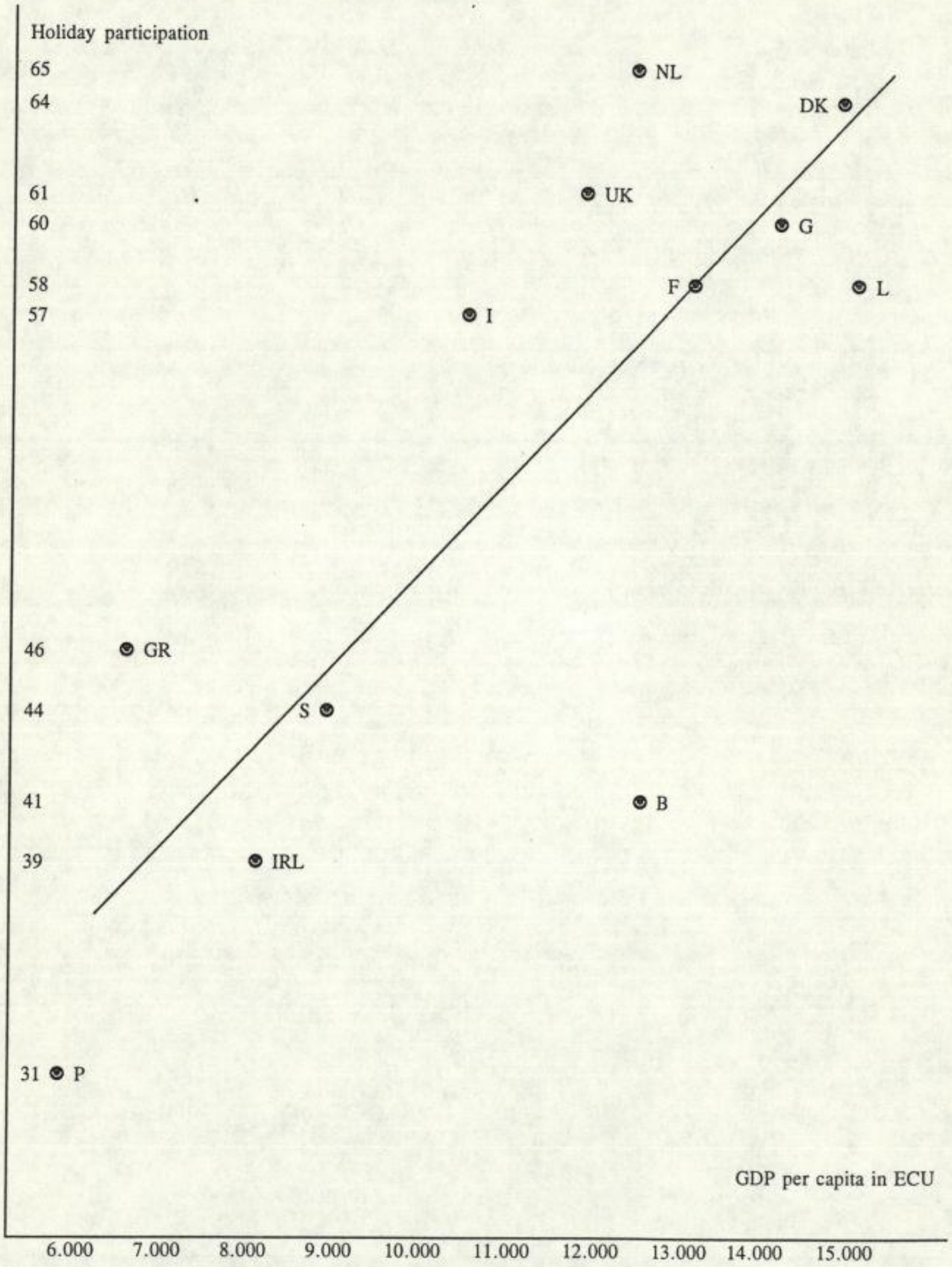


FIGURE 2. Holiday participation in EC countries in 1985 in relation to Gross Domestic Product



Notes: 1) The correlation coefficient amounts to o.77

2) The exceptionally low holiday participation registered for Belgium may be due to the fact that the survey excluded short trips with a duration of less than 4 days.

Source: CEG, 1987

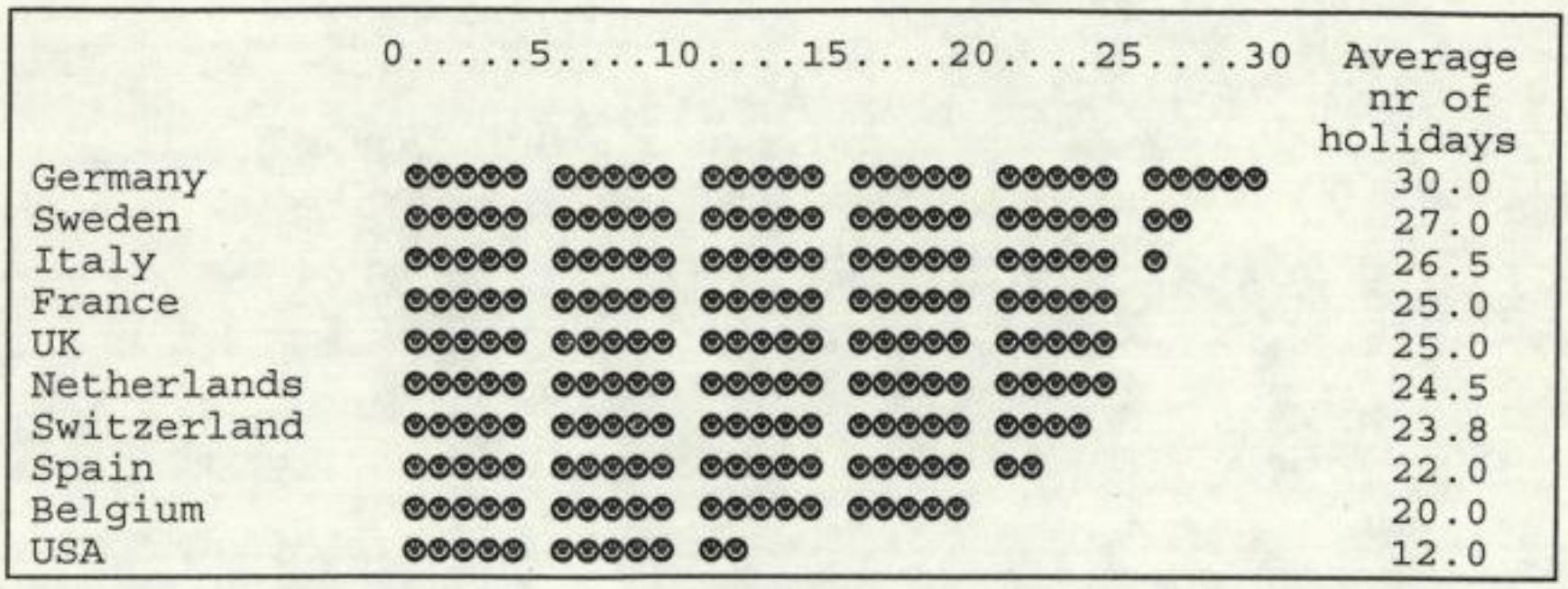
In order to be able to travel obviously also **time** is needed. In the 1970s the majority of employees in Western Europe had a four weeks paid holiday entitlement. In most industrialised countries in Western Europe the entitlements since then have grown further and amount to 25 days on average now (Figure 4). In the US, however, holiday entitlements are only 12 days. Probably the lowest holidays entitlements of any industrialized country are to be found in Japan. In this country holidays abroad are for many consumers limited by time constraints. The availability of leisure or discretionary time is clearly related to **age**. The groups least subject to such constraints are on the one hand retired people and on the other hand students and other categories of youth. The latter are, moreover, more often willing to trade time against money, as is clear from Table 2 which indicates at equally low incomes a much higher holiday participation for the 18-34 age group as compared to the 35-49 and 50 and over age groups. The figures show a decreasing tendency to go on holiday with growing age, a tendency confirmed by European Travel Monitor data.

Since the early 1970s the composition of international tourism has changed. Weakening family-ties, not just socially but also economically, and increasing individual, social and psychological mobility have resulted in the birth of modern youth tourism manifesting itself in an increased travel participation of the young and young adults travelling on their own or in small groups. Youth tourism is a dynamic factor in maintaining the overall growth in tourism arrivals both in the world in general and in Europe. A large-scale survey on holidays of 4 or more days taken by adult residents (age 15 and over) of EC countries revealed that in 1985 the holiday participation rate in the age group 15-24 amounted to 62 % compared to an average of 56 % for all residents (Commissie van de Europese Gemeenschappen, 1987). In 1980, the percentage share of youth tourist arrivals in total tourist arrivals in Europe amounted to 16.6 %, in 1990 this share had risen to 21.37 % (WTO, 1990 + supplementary data provided by WTO).

Table 2 further demonstrates the paramount importance of income. Judging from the column of affirmative replies the income constraint is largest in the 35-49 age group. This follows from the fact that in this age group families with dependent children of school age are to be found. For such households the per capita discretionary income is lower than for other household types such as "dinks" (double income, no kids) and "empty nesters"(households without dependent children).

Not only per capita discretionary income is lower for such households but also the costs of taking a holiday are higher as they are bound to the official school holiday periods in which higher prices are quoted. The **household type** and size or **life-cycle** thus impact considerably on holiday participation. In a recent survey done in the Netherlands Vijgen and Van Engelsdorp Gastelaars (1986) distinguished apart from the traditional family consisting of

FIGURE 4. Holiday entitlements in collective labour agreements, 1993



Source: Den Tex, 1993

TABLE 2.The relationship between age, income and holiday participation.

	Intention to go on holiday	
	Certainly YES	Certainly NO
age 18 - 34, total	**48**	**20**
- income < 1400 DM p.m.	37	22
- income > 1400 DM p.m.	55	18
age 35 - 49, total	**42**	**34**
- income < 1400 DM p.m.	24	40
- income > 1400 DM p.m.	54	30
age 50 and over, total	**35**	**42**
- income < 1400 DM p.m.	27	51
- income > 1400 DM p.m.	49	26

Source: Lehmann, 1975

man, wife and children, in which the man is the only income earner, four new household types:

- youth living on their own, so-called starters (age 20-35, with a maximum of 20 hours paid work per week);
- working singles living on their own (age 25-45, with a full-time job);

- working couples without children (age 25-45, with together 1.5 job at the minimum);
- working couples with children (age 25-45, with together 1.5 job at the minimum).

The financial budgeting data collected for these household types show clear differences in per capita discretionary income between on the one hand the traditional family and on the other hand dinks and working singles. Both net and gross holiday intensity proved to be lowest for traditional families. Moreover, it was found that traditional families are more inclined to take a domestic holiday. This implies that the larger the distance and the higher the costs of a holiday, the smaller the chances that a destination will succeed in attracting a substantial number of traditional families.

Using the differences existing within Western societies between the allocation of discretionary time on the one hand and discretionary income on the other hand Lakatos and Van Kralingen (1985) have divided the market into four segments (Figure 5), with the following characteristics:

FIGURE 5. A Matter of Time and Money

	Budget Conscious	Luxury Prone
Abundant Time	A Lack of Money relative to Time	B Much Time Lots of Money
Time Constrained	C Lack of Money Lack of Time	D Lack of Time relative to Money

Source: Based on Lakatos and Van Kralingen 1985, adapted from Go, 1993

Segment A consists of consumers with an abundance of time relative to discretionary income; segment B of consumers with both an ample supply of time and money; segment C of those who are constrained by both a lack of time and money; and segment D of those with little discretionary time relative to income. In segment A numerous students at universities and polytechnics are to be found, as well as the unemployed with good social benefits, and those employed in seasonal jobs. In this market segment time is traded against money. In segment B wealthy (early) retired people are to be found, in segment C the low paid traditional households with dependent children in school age. Segment D consists of "fast track professionals" (Go, 1993), such as "yuppies" (young urban professionals) and dinks. As

opposed to segment A, in segment D money is traded against time.

Low cost holidays appeal to market segment A. There is consequently a preference for relatively inexpensive but slow transport modes, such as local trains and buses, and low cost accommodation such as hostels and camping. Many holidaymakers in this segment practice backpacking, and are of the non-institutionalised type (Cohen 1974), which does not make use of the services of tour operators. Per capita daily expenditures are low compared to those of most other types of tourists, but at least part of this is compensated for by a relatively long stay and relatively low import content (high retention ratio) of their purchases.

Consumers in segment B are rather demanding. Their holidays tend to be of the luxury type. There is a preference for expensive and comfortable types of accommodation such as hotels in the higher grades and luxury type holiday villages. Transportation has to be comfortable and may be relatively expensive, for instance air travel, although it should not necessarily be very fast, for instance travel by private car or by first class express train.

Consumers in segment C are looking for relatively inexpensive family type holidays, often at a relatively close distance to the home environment. The private car is the preferred means of transport. As to accommodation there is a preference for self-catering apartments and holiday houses, but also camping. Participation in foreign travel is relatively low compared to that in other segments. Holidays are often of the pre-booked type.

The consumers in segment D are, similar to those in segment B, rather demanding. Their holidays tend to be of the luxury type too. There is a preference for expensive and comfortable types of accommodation such as hotels in the higher grades and luxury type holiday villages, particularly those appealing to a youthful market, such as Club Med. Transportation has to be both comfortable and relatively fast, and it may be relatively expensive. There exists in this segment a definite preference for more than one holiday a year. The second or third annual holiday is normally a short break, for instance a city trip. Distance is seldom a real constraint. It impacts more on the limited discretionary time than on income.

Distance, Travel Time and Travel Costs

Distance influences both travel time and travel costs. The impact on travel time is important as there is no reason to assume that time spent or saved on the holiday activity itself and on access to that activity is valued equally. Time spent on access to the holiday destination may be experienced as a disutility. In many cases it is experienced as having at least a lower utility than the holiday activity itself. This implies that in general, destinations at a large distance from origin markets are at a disadvantage compared to those at a short distance. There is, however, one notable exception to this rule. For reasons of ego enhancement it may, for some individuals, be attractive to cover large distances and to go further afield than

is usual for members of the social group (peer group) to which they belong. It enables them to show off with an "exclusive" experience. This tendency towards conspicuous consumption, and deriving positional experiences, increases with growing prosperity. Hirsch (1976) notes that "as average productivity grows, and democratic wealth with it, the appetite for oligarchic wealth will also grow, and in practice at a faster rate".

Increasing distance normally also implies increasing travel costs. There are, however, two concepts of distance: geographic distance and economic distance. The first refers to distance as measured in miles or kilometers, the second to the costs to be reckoned with in bridging distance. Packaging travel as practiced by tour operators and pricing policies by transport operators cause divergences from the linear relationship normally present between distance and travel costs. The pricing policies of operators in rail and air transport reveal decreasing unit costs per mile travelled. The activities of tour operators exacerbate this distortion of the linear relationship. By singling out destinations and offering lower rates on a charter basis they further increase the disparity between geographic distance and economic distance resulting from the pricing policies in air and train transportation. Packaging reduces travel costs and consequently opens up travel opportunities to financially less well off segments of demand. Although tour operators tend to put a downward pressure upon the per guest gross receipts of accommodation establishments and will claim part of the client's holiday budget as profit margin and to cover operating costs - money which will be lost for the destination country-, their activity results in a guaranteed occupancy for part of the accommodation stock and an increased number of tourists by broadening the market.

Foreign tour operators have access to a wide network of distribution outlets. In 1977-78 for instance the ten biggest German tour operators offered their packages through 732 in-company travel agencies (326 of which belonged to Neckermann) and 17,241 independent travel agents (Tietz, 1980).

It should also be born in mind that foreign tour operators spend enormous amounts on promoting a destination. Annual promotional outlays by tour operators normally considerably exceed the combined outlays by local operators and the NTO of the destination country (Erbes, 1973). In the mid 1980s Touristik Union International (TUI) for instance spent 60 million DM per year on promotion (Geppert, 1986).

The relationship between distance, travel time and travel costs is further influenced by the quality of the existing transport infrastructure. This applies particularly to surface transport. A low quality road system slows down vehicle speed and makes a journey both more time consuming and more costly: VOC per travelled mile increase and additional costs are incurred for food and possibly lodging while on the way to the holiday destination. It, moreover, affects the safety and comfort of travelling by car or coach.

Inferior road conditions limit the catchment area for tourism. Whereas it is nowadays accepted that the inner zone of European tourism extends over a distance of about 1200 km

from the main European core generating areas the actual boundaries may significantly vary according to actual travel time based on road conditions. Unlike Western Europe, Poland lacks a developed network of limited access expressways and high-speed roads. Poland currently has only 257 kilometers of expressways and 254 kilometers of high-speed highways. According to the guidelines of the Ministry of Transport and Maritime Economy Poland needs to add more than 1,900 kilometers of expressways up to the year 2010 (Sosnowska-Smogorzewska, 1993). Recently budget constraints, moreover, have caused a maintenance backlog. The combined effect is that upon entering Poland from the West average maximum speed is reduced by over 40 %. The implication is that although the larger part of Poland is within the inner zone of European tourism as far as a major part of continental Western Europe is concerned (Table 3), destinations such as Warsaw or Krakow are in fact part of the outer zone of European tourism, putting them at a relative disadvantage compared to other destinations at equal geographical distance.

As a consequence Poland as a holiday destination has to cope with more intervening opportunities than would have been the case if road transport in Poland was more comfortable and less time consuming. Improvement of road conditions is particularly important in view of the fact that for a major part of foreign holiday travel in Europe the private car is used.

The effect of distance as a factor limiting the choice of destinations in holiday travel (or from the destination point of view the catchment area) can be seen from the distances traveled by the Swiss in 1980 while holidaying abroad:

- 42 % of the trips did not exceed 500 kms,
- 64 % of the trips did not exceed 700 kms, and
- 78 % of the trips did not exceed 1,000 kms.

Only 14% of the trips covered a distance between 1,000 and 2,000 kms and 8% of the trips exceeded 2,000 kms (Baretje, 1981b).

Size of the Holidays Abroad Market in Europe

The EC Countries' propensity to take holidays abroad is directly related to per capita income, and size and location of the country.

The smaller the size of the country the greater the chance that in holiday travel the national border will be crossed. The extremely high propensity in Luxemburg to holiday abroad stems from the small size of the country (combined with a high per capita income). In 1985 of all main holidays of adults (defined as 15 years of age and over) with a minimum duration of 4 days 94 % were spent abroad (CEG, 1986). In the U.S. on the other hand, which has one of the highest per capita incomes in the world, the propensity to travel abroad is very low

TABLE 3.Road distances and journey time by train between Warsaw and European cities.

City	Road distance in kms	Journey time by train in hrs
Berlin	590	9
Prague	620	14
Vienna	678	13
Budapest	700	15
Hamburg	850	
Frankfurt	1,120	
Belgrade	1,120	24
St.Petersburg	1,200	
Amsterdam	1,223	21
Moscow	1,270	19
Zürich	1,315	24
Venice	1,323	
Luxemburg	1,340	
Brussels	1,340	
London	1,590	30
Paris	1,610	24
Geneva	1,658	
Rome	1,810	37
Barcelona	2,390	
Madrid	2,990	41

Source: State Sport and Tourism Administration, 1992

due to the size of the country and the geographic location. The tendency to go on holiday southwards to the sun helps to explain why so many inhabitants of France spend their holiday in their own country.

A 1986 study commissioned by the Commission of the EC (CEG, 1987) contains information for the year 1985 which makes it possible to compare the market potential in terms of foreign holiday trip generating capacity of the twelve EC member countries (Table 4). In the survey only holiday trips with a duration of 4 or more days were taken into account.

The analysis produces some unexpected results. Firstly, contrary to popular belief, the potential of the Dutch market to generate holidays abroad is significantly larger than that of France or Italy despite the much larger populations of these countries.

Secondly, after deducting the mass market of mainly sunlust travel to Mediterranean destinations, Italy emerges as a slightly better market for destinations in northern Europe than

France. It is, moreover, expected that "In the long run 'southern' tourists will increasingly visit 'northern' countries, a trend already started with, eg growing Italian and Spanish visitors in Benelux countries" (Kormoss, 1989). For Poland, however, Spain will be a substantially smaller market than Italy, not only because of the lower propensity to travel abroad but also because of the larger distance and the consequently higher travel costs.

TABLE 4. Foreign holiday trip generating capacity of the adult population in the EC, 1985

Country	Holiday propensity	% Share of foreign holidays		Foreign arrivals generated					
		Main holiday	Second holiday	Main holiday x 1000	Second holiday x 1000	Total x 1000	Mediterra-nean share %	Total minus Mediterranean share x 1000	RANK
Luxemburg	58	94	x	164	-----	164 1)	n.a.	-----	-----
The Netherlands	65	64	51	4,742	1,395	6,138	40.6 2)	3,646	3
Germany	60	60	46	18,528	4,025	22,552	53.1	10,577	1
Belgium	41	56	x	1,819	-----	1,819 1)	70.9 2)	529 1)	7
Ireland	39	51	x	488	-----	488 1)	n.a.	-----	-----
Denmark	64	44	48	1,164	476	1,640	36.3 3)	1,045	6
UK	61	35	20	9,652	1,899	11,550	64.1	4,147	2
France	58	16	17	3,977	1,967	5,943	65.0	2,080	5
Italy	57	13	9	3,293	760	4,053	46.7 2)	2,160	4
Portugal	31	8	x	181	-----	181 1)	n.a.	-----	-----
Spain	44	8	x	1,016	-----	1,016 1)	56.9	438 1)	8
Greece	46	7	x	248	-----	248 1)	n.a.	-----	-----
EC Total				45,272	10,522	55,792		24,622	

Notes: x indicates a too low percentage to give further details
1) main holiday only
2) 1982
3) 1980

Sources: CEG, 1986; Baretje, 1985

In view of the existing unequal distribution of wealth within the EC it is not surprising to note that within the EC twelve regions generate about 65 % of all trips abroad (Table 5). From the point of view of concentrated trip generating capacity these are the markets to target within the European Community. From Table 5 it can further be gathered that as far as car use for holiday travel is concerned England is a notable exception in that the car is used far less than in other EC countries. This makes it a less interesting target market as far as family holidays are concerned. The opening of the Channel Tunnel in 1994, however, may change this.

The number of trips abroad given in table 5 exceeds the total given in table 4 for three reasons.

TABLE 5.

Top Twelve Regions for Generating Outgoing Tourism in the EC, 1990			
	All Trips million	Car Trips million	Car Trips %
1 North Rhein Westphalia, Germany	17	9.5	56
2 Bavaria, Germany	12	6.9	58
3 Flemish Belgium	12	5.7	48
4 N.W.Germany ,incl.W.Berlin	11	5.3	48
5 Greater London/S.E. England	11	2.4	22
6 Central Germany (Hessen,Rheinland-Pfalz,Saarland)	9	5.8	64
7 Baden-Württemberg, S.W. Germany	9	4.8	53
8 West Holland (Amsterdam, Rotterdam, The Hague etc.)	7	1.9	27
9 Northern England	5	2.4	48
10 North West Italy	5	1.9	38
11 Greater Paris Area	4	2.5	63
12 South Netherlands			

Source: Markant Adviesbureau, 1991, based on European Travel Monitor. ETDC Luxemburg

Firstly, the figures in table 4 refer to holiday travel only. Secondly, they exclude short holidays with a duration of less than 4 days. Thirdly, in the 1985-1990 period, travel participation, including participation in long holidays, has grown, as can be seen in Table 6. The rank order for long holidays (see Table 4) is not much affected. Germany is still the biggest market in outgoing long holidays, followed at a distance by Great Britain and the Netherlands. The notable exception is to be found in the position of the combined Belgian/Luxemburg market, which shows a remarkable increase and now holds the fourth position.

Based on Table 6 in generating long holidays in decreasing order of importance six (groups of) countries can be detected:

1. Germany.
2. Great Britain.
3. The Netherlands / Belgium / Luxemburg.
4. France and Italy.
5. Switzerland and Sweden.
6. Spain, Austria and Denmark.

TABLE 6.Trips abroad of one night or more originating in EC and EFTA countries, 1990 (trips in thousands)

	TOTAL	PURPOSE OF TRIP				ORGANISATION		
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre Book
	210045 100%	29268 100%	120026 100%	17193 100%	30423 100%	56572 100%	71996 100%	7748 100
Country of Origin								
EEC - Countries	177134 84%	23267 79%	104696 87%	15629 91%	23295 77%	49563 88%	55639 77%	6906 89
Belgium/Luxembourg	16878 8%	3092 11%	9642 8%	569 3%	2151 7%	3582 6%	6077 8%	698 9
Denmark	5888 3%	414 1%	3006 3%	424 2%	1613 5%	1435 3%	2892 4%	141 2
France	14756 7%	1424 5%	8710 7%	544 3%	2369 8%	3707 7%	6010 8%	438 6
Germany (W)	70349 33%	10046 34%	41422 35%	10943 64%	6281 21%	20975 37%	13172 18%	3620 47
Great Britain	26665 13%	2357 8%	18157 15%	779 5%	3599 12%	11447 20%	11651 16%	229 3
Greece	2298 1%	234 1%	931 1%	115 1%	783 3%	465 1%	1270 2%	56 1
Ireland	1170 1%	83 *	774 1%	80 *	142 *	236 *	831 1%	10
Italy	13430 6%	2052 7%	7957 7%	848 5%	1925 6%	2670 5%	6105 8%	464 6
Netherlands	16679 8%	2008 7%	10144 8%	734 4%	2744 9%	3344 6%	4667 6%	837 11
Portugal	1791 1%	270 1%	657 1%	69 *	363 1%	184 *	542 1%	94 1
Spain	7231 3%	1288 4%	3295 3%	523 3%	1325 4%	1518 3%	2422 3%	316 4
EFTA - Countries	32911 16%	6001 21%	15331 13%	1564 9%	7128 23%	7010 12%	16357 23%	842 11
Austria	6397 3%	1131 4%	3043 3%	534 3%	1080 4%	1263 2%	2205 3%	270 3
Finland	4164 2%	1124 4%	1867 2%	60 *	815 3%	1645 3%	1987 3%	51 1
Iceland	102 *	4 *	57 *	3 *	25 *	30 *	57 *	1
Norway	3932 2%	846 3%	1515 1%	186 1%	1014 3%	711 1%	2454 3%	73 1
Sweden	10804 5%	1894 6%	4300 4%	384 2%	3052 10%	2116 4%	6246 9%	169 2
Switzerland	7512 4%	1003 3%	4549 4%	397 2%	1141 4%	1245 2%	3408 5%	276 4

Note: 000's are grossed up estimates of adult trips (15 years and older)
Porcentages based on number of answers. Deviations from the Total or from 100% ar

Source : European Travel Monitor, 1990

As far as travel modes are concerned Great Britain presents a special case because of the high rate of air travel, both of the chartered and scheduled type. This combines with a relatively high share of inclusive and other pre-booked tours. In Germany on the other hand the majority of travel is done by car, which accounts for a high share of tours without pre-booking. Another feature of the German market is the relative importance of coach travel.

Table 7 presents the total number of trips of one night or more from EC and EFTA countries to Eastern Europe in 1990, as well as a breakdown according to the purpose of travel. All leisure trips abroad consist of all holidays abroad plus all VFR travel abroad. Only 4 % of all EC and EFTA travel abroad was destined for Eastern Europe. Three countries generate clearly above average arrivals: Austria, Finland and Greece. The bulk of their Eastern European arrivals generated is, however, concentrated in a few countries. With the exception of Greek arrivals in Hungary the above average arrivals are limited to those in neighbouring countries.

Total arrivals in Poland amount to 1,726,000, of which 83 % are leisure trips and 17 % business trips. Of the leisure trips 464,00 or 33 % are VFRs.

The main foreign origin market for tourism in Poland in 1990 was West Germany, which provided more than 60 % of all leisure arrivals originating in the EC-EFTA region (Table 8). Surprisingly Belgium comes in third position, after West Germany and Great Britain, but well ahead of the Netherlands.

As to the characteristics of the combined EC-EFTA market for holidays abroad Table 9 provides information on some broad categories regarding types of holiday. More detailed information is not available and the classification is somewhat ambiguous in that the possibility of overlap does exist. As noted by Guibilato (1983) travel motivations are very diverse and every classification is therefore beset with difficulties. It is worth noticing that 40 % of all long holidays is of the sunlust type in which inclusive tours and travel by car and charter plane play an important role. Another numerically important type of long holiday is the touring holiday in which car and coach are the preferred modes of transportation. The numerically most import type of short holiday is the city trip.

The Market for Domestic Tourism

Jung (1992) states that it should be remembered that the current economic reforms in Poland have led to a rapid creation of fortunes and produced a visible and ostentatious class of entrepreneurs. Their demand for entertainment, accommodation and recreation should not be

TABLE 7.Trips of one night or more from EC and EFTA countries to Eastern Europe, and breakdown according to purpose

A

	Total	Aust-ria	Bel-gium	Den-mark	Fin-land	France	W Ger many	Great Brit.	Gre-ece	Ice-land	Ire-land	Italy	Luxe bur
						Country of Origin							
	210045	6397	16480	5888	4164	14756	70349	26665	2298	102	1170	13430	39
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100
Eastern Europe	8945	902	411	277	584	385	3488	630	337	2	12	644	
	4%	14%	2%	5%	14%	3%	5%	2%	15%	2%	1%	5%	
Czechoslovakia	2149	299	128	101	59	112	822	139	8	*	1	199	
	1%	5%	1%	2%	1%	1%	1%	1%	*	*	*	1%	
Hungary	2859	540	71	76	54	104	984	80	209	1	1	298	
	1%	8%	*	1%	1%	1%	1%	*	9%	1%	*	2%	
Poland	1726	22	98	80	51	82	899	211	-	-	1	58	
	1%	*	1%	1%	1%	1%	1%	1%	-	-	*	*	
Romania/ Bulgaria	1122	14	67	7	12	126	453	114	113	*	6	25	
	1%	*	*	*	*	1%	1%	*	5%	*	1%	*	
Soviet Union	1363	34	46	31	426	27	339	116	7	-	3	105	
	1%	1%	*	1%	10%	*	*	*	*	-	*	1%	

B

	Total	Aust-ria	Bel-gium	Den-mark	Fin-land	France	W Ger many	Great Brit.	Gre-ece	Ice-land	Ire-land	Italy	Luxe bur
						Country of Origin							
	176077	5273	14055	4226	3308	11754	63373	22251	1514	76	1028	11493	35
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100
Eastern Europe	7422	755	355	193	477	278	3088	498	270	1	11	562	
	4%	14%	3%	5%	14%	2%	5%	2%	18%	2%	1%	5%	
Czechoslovakia	1831	252	77	77	47	100	713	139	8	*	1	177	
	1%	5%	1%	2%	1%	1%	1%	1%	*	*	*	2%	
Hungary	2457	458	71	60	50	77	860	80	172	1	-	285	
	1%	9%	1%	1%	2%	1%	1%	*	11%	1%	-	2%	
Poland	1424	22	93	61	41	42	868	96	-	-	1	43	
	1%	*	1%	1%	1%	*	1%	*	-	-	*	*	
Romania/ Bulgaria	938	9	67	-	12	98	389	114	86	-	6	13	
	1%	*	*	-	*	1%	1%	1%	6%	-	1%	*	
Soviet Union	1033	19	46	13	345	27	268	99	4	-	3	84	
	1%	*	*	*	10%	*	*	*	*	-	*	1%	

C

	Total	Aust-ria	Bel-gium	Den-mark	Fin-land	France	W Ger many	Great Brit.	Gre-ece	Ice-land	Ire-land	Italy	Luxe burg
						Country of Origin							
	149295	4174	12466	3420	2990	10134	51468	20513	1165	62	857	10009	266
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Eastern Europe	5909	556	298	145	364	190	2387	482	220	1	9	504	
	4%	13%	2%	4%	12%	2%	5%	2%	19%	2%	1%	5%	2%
Czechoslovakia	1459	183	68	60	47	66	559	139	8	*	1	165	
	1%	4%	1%	2%	2%	1%	1%	1%	1%	*	*	2%	
Hungary	2077	340	71	47	38	45	731	80	138	1	-	273	
	1%	8%	1%	1%	1%	*	1%	*	12%	1%	-	3%	1%
Poland	960	12	89	43	38	28	547	81	-	-	1	10	
	1%	*	1%	1%	1%	*	1%	*	-	-	*	*	
Romania/ Bulgaria	732	7	47	-	12	48	306	114	71	-	6	13	
	*	*	*	-	*	*	1%	1%	6%	-	1%	*	
Soviet Union	851	16	23	13	247	13	244	99	4	-	1	84	
	1%	*	*	*	8%	*	*	*	*	-	*	1%	

D

Country of Origin

TABLE 8. Holiday-and VFR-arrivals in Poland from EC and EFTA countries, 1990 (trips in thousands and percentages)

Country of origin	Leisure trips (1)		Holiday trips (2)		VFR trips (3)		3/1 %	Leisure trips market share of Poland	Holiday trip market share of Poland
	(000)	%	(000)	%	(000)	%			
Austria	22	1.5	12	1.3	10	2.2	45	0.5	0.3
Belgium	93	6.5	89	9.3	4	0.9	1	0.7*	0.7*
Denmark	61	4.3	43	4.5	18	3.9	30	1.6	1.3
Finland	41	2.9	38	4.0	3	0.6	7	1.3	1.3
France	42	2.9	28	2.9	14	3.0	33	0.4	0.3
W-Germany	868	61.0	547	57.0	321	69.2	37	1.4	1.1
Gr.Britain	96	6.7	81	8.4	15	3.2	16	0.5	0.4
Greece	-	-	-	-	-	-	-	-	-
Iceland	-	-	-	-	-	-	-	-	-
Ireland	1	0.1	1	0.1	-	-	0	0.1	0.1
Italy	43	3.0	10	1.0	33	7.1	77	0.4	0.1
Luxemburg	1	0.1	1	0.1	-	-	0	*	*
Netherlands	52	3.7	34	3.5	18	3.9	35	0.4	0.3
Norway	28	2.0	23	2.4	5	1.1	18	1.1	1.0
Portugal	-	-	-	-	-	-	-	-	-
Spain	-	-	-	-	-	-	-	-	-
Sweden	66	4.6	46	4.8	20	4.3	30	1.0	0.7
Switzerland	9	0.6	9	0.9	-	-	0	0.2	0.2
Total EC+EFTA	1,424	100	960	100	464	100	33	0.9	0.6

Notes: Totals may not add up due to rounding.
* Belgium and Luxemburg combined.
Source: Based on ETDC, 1991

neglected in the analysis of investment projects in tourism, which are usually based only on the estimated demand of foreign tourists.

Except for the potential domestic holiday demand originating from this new class of capitalists, however, he is rather pessimistic about the domestic holiday demand potential and thinks that its development is unpredictable (Jung, 1993). He rightly explains the slump in domestic tourism since 1989 by two factors: "the increased budget constraints for the impoverished Polish mass consumer and growing competition from vacations abroad". He, however, fails to analyse the development in consumption patterns against the theory of

TABLE 9. Outbound travel from EC and EFTA countries according to holiday types, 1990
(trips in thousands)

Type of Holiday	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Holidays Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Charter	Plane Scheduled	Coach	Train
	145696	27233	118463	-	-	56126	40594	47991	66316	27445	25602	27950	12847
	100%	100%	100%	-	-	100%	100%	100%	100%	100%	100%	100%	100%
Sun and beach holiday	50233	3906	46327	-	-	24418	12715	12962	21995	16824	9458	7538	2873
	35%	15%	40%	-	-	44%	32%	27%	34%	62%	37%	27%	23%
Recreational holiday in the country	14621	2986	11635	-	-	3328	3927	7243	8985	1342	1906	1967	1345
	10%	11%	10%	-	-	6%	10%	15%	14%	5%	8%	7%	11%
Recreational holiday in the mountains	9106	1821	7285	-	-	2061	2490	4454	6055	584	794	1425	653
	6%	7%	6%	-	-	4%	6%	9%	9%	2%	3%	5%	5%
Touring holiday	27344	5418	21927	-	-	12009	7193	8053	10529	3558	4468	9050	2482
	19%	20%	19%	-	-	22%	18%	17%	16%	13%	18%	33%	20%
Health oriented holiday	1451	354	1097	-	-	535	412	501	762	222	233	223	111
	1%	1%	1%	-	-	1%	1%	1%	1%	1%	1%	1%	1%
Snow holiday	7904	973	6931	-	-	2590	2182	3084	4889	709	532	1787	760
	6%	4%	6%	-	-	5%	5%	7%	7%	3%	2%	6%	6%
Sporting holiday (not snow)	1980	431	1549	-	-	609	549	776	1021	415	327	183	123
	1%	2%	1%	-	-	1%	1%	2%	2%	2%	1%	1%	1%
Cruise/boat trip	2309	1486	823	-	-	1154	789	349	239	186	143	263	234
	2%	6%	1%	-	-	2%	2%	1%	*	1%	1%	1%	2%
City holiday/city break	21481	7749	13732	-	-	7111	7049	7178	8028	2024	5087	4569	3379
	15%	29%	12%	-	-	13%	18%	15%	12%	7%	20%	16%	27%
Other holiday	7204	1526	5678	-	-	1714	2671	2687	2924	1150	2302	694	763
	5%	6%	5%	-	-	3%	7%	6%	4%	4%	9%	3%	6%
DK/No answer	2030	582	1448	-	-	587	617	682	870	422	349	250	124
	1%	2%	1%	-	-	1%	2%	1%	1%	2%	1%	1%	1%

Source: European Travel Monitor, 1990

consumption phases formulated by Nerb (1978). According to this theory in the development of consumption patterns three phases can be distinguished. In the first phase consumption is dominated by the demand for goods belonging to life's necessities, such as food and shelter. Growing wealth leads to the second phase which is dominated by demand for consumer durables which make life more comfortable, such as refrigerators, automatic washing machines, radio and TV sets, and cars. As cars are among the most expensive consumer durables the growth in private car ownership is of particular significance. Finke (1982) consequently characterises this phase, which in the industralised countries of Western Europe occurred in the sixties, as the motoring wave ("die Motorisierungswelle"). In this phase countries such as the Netherlands experienced an almost threefold increase in car ownership. The growth in car ownership favours mobility, both of the work related and leisure related type. Burkart and Medlik (1974) note that "it has engineered the abandonment for most families of the coach and the railway as the preferred means of transport for holiday purposes". It has also lowered the costs of transportation for family holidays. As a result of growing wealth further increases in car ownership took place in the third consumption phase, which may be typified as the phase in which personal development through non-compulsory education and recreation, including leisure travel, rise to prominence. In the seventies annual expenditures for recreation show high growth figures. The growth is largest for holiday expenditures. In 1980 the share of holiday expenditures in the total budget for recreation of modal income families in Germany had risen to 32 %, and were the most important category of expenditures within this budget (Opaschowski, 1982). By differentiating according to socio-professional groups Claeys and Mertens (1984) have clearly demonstrated that the ranking of holiday expenditures within the budget for recreation is related to income levels, and consequently is dependent upon the consumption phase which a society is experiencing. The fact that after 1989 holiday participation in Poland slumped, whereas the ownership of consumer durables increased shows that the normal sequence of consumption phases has been distorted and perverted in the pre-1989 years by the then prevailing system of subsidies. Now that the transition to a market economy progresses these distortions are redressed and the normal sequence of consumption phases is established. This implies that the second consumption phase which at present is well underway will after reaching maturity, give way to the third phase. The important question is when this will happen. In answering this question a comparative analysis of the growth of car ownership may provide some guidance.

In 1991 car ownership in Poland amounted to about 6 million on a population of about 38 million, or on average about one car for six inhabitants, or slightly less than the Netherlands had in 1970 (Poland in 1991: 158 cars per 1000 inhabitants versus the Netherlands in 1970: 173). Allowing for the fact that some cars have been acquired by theft and thus do not express the attainment of a certain level of wealth the ratio is lowered to on average about

one car for seven inhabitants or 142 cars per 1000 inhabitants, which is comparable to the degree of car ownership which the Netherlands had reached in 1968. This implies that there is some reason for optimism. Assuming that economic transition and economic recovery continue the demand for consumer durables will in a few years time probably have reached some level of saturation causing a shift in consumer demand towards holiday travel.

Zawadzki (1992) estimates the total number of domestic tourist arrivals in 1990 at 53.6 million, consisting of 16.1 million trips of 4 nights or more and 37.5 million short trips of less than 4 nights. As noted by Zawadzki (1992) these figures differ largely from that on the number of domestic arrivals (both for leisure and business purposes) in registered accommodation establishments, as can be seen from table 10.
The implication is that the large majority - more than 80 % - of the domestic arrivals in the years 1990-1992 stayed with friends and relatives (VFRs), made use of non-registered commercial accommodation, and/or stayed in accommodation establishments which for reasons of tax evasion did not officially report their stay. The bulk of the 80 % most probably consisted of VFRs.

TABLE 10. Domestic arrivals in registered accommodation and total domestic tourist arrivals of persons of 15 years and over, 1989-1992 (millions)

Year	Domestic accommodation arrivals (1)	Total domestic arrivals (2)	2 - 1 (3)	3/2 %	Gross travel intensity based on	
					(1)	(2)
1989	13.0 [1)]	n.a.	---	---	34	---
1990	8.5 [2)]	53.6	45.1	84	22	47.0
1991	8.2	44.1	35.9	81	21	44.0
1992	8.4 [3)]	47.5	39.1	82	22	45.5

Notes: 1) Total accommodation arrivals 1989 minus foreign arrivals 1-10-88 to 31-9-89
2) Total accommodation arrivals 1990 minus foreign arrivals 1-10-89 to 31-9-90
3) Total accommodation arrivals 1992 minus foreign arrivals, which were grossed up from 9 month period using the 1991 percentage

Sources: Based on GUS 1990, 1991, 1992, 1993 and unpublished data; Zawadzki, 1992

The data on domestic accommodation arrivals suffice to draw the conclusion that domestic tourism demand (consisting of both holiday travel and business travel) provides the mainstay of tourism in Poland. In 1990 tourist arrivals in Poland from W.Germany, the biggest single foreign market, amounted to 899,000 (ETDC, 1991), whereas domestic demand resulted in 8.5 million arrivals in registered accommodation establishments only (GUS, 1991). No other single market will therefore probably ever be able to compete with the size of the domestic market. Deriving 8.5 million tourist arrivals from W.Germany would imply that Poland would capture 14.5 % of all W.German outbound travel (holiday travel, VFRs and business travel).

Although, due to the present economic situation domestic tourism is experiencing a difficult time, as the form of tourism which is least subject to intervening opportunities and the domestic tourist thus being the least discriminating, it also shows, bearing in mind the substantial increase in costs, a high degree of resilience. Instead of giving up holidays altogether many consumers prefer to economise by taking shorter and cheaper holidays, a tendency similar to that seen in Western European countries during periods of recession.

The age group showing the highest resistance against giving up holidays is youth. In recent years trips by young people (aged 16-24) accounted for 40-47 % of all domestic arrivals (Zawadzki, 1992). This proves that the tradition of going on holiday is firmly entrenched in Polish society.

The regions most visited by domestic tourists using commercial accommodation are in the mountains and uplands (in 1991 the voivodships of Nowosadeckie and Bielskie show the highest domestic arrival figures), and in the lake and coastal areas.

In view of both the present and future domestic demand potential it would be unwise to neglect the domestic market in focussing fully on foreign origin markets. With growing incomes more Poles may travel abroad but at the same time the basis for domestic travel will be enlarged.

Strategic choices for Poland

Both for successful development of the tourist product offers and for effective marketing efforts at least two strategic choices have to be made:

- At what geographic target markets (countries and regions within countries) should marketing be concentrated;
- On what market segments (according to type of holiday) should marketing efforts aim.

The latter should enable a fit with the products to be offered.

The figures provided in the preceeding section show that the largest single market for tourism in Poland is its domestic market. Within this market at present youth tourism dominates, but

the now depressed demand for family holidays provides a huge reservoir for generating future increases in domestic demand.

From the Tables given in the Annex it can be seen that Germany as a country not only provides by far the largest potential foreign market for Poland, but also the largest regionally concentrated market potential, which may facilitate effective marketing. Table 11 provides an overview of the EC/EFTA countries and regions within these countries having the best potential for generating holiday arrivals in Poland.

The allocation of marketing funds for the EC/EFTA market should be based on the potential for generating holiday arrivals in Poland. The shares given in table 11 thus provide a yardstick for allocating the marketing budget geographically. Some modifications may result from taking into account differences in spending levels. However, a cautious approach is called for as the presently available data do not permit leisure travel and holiday travel to be singled out from total travel. The high 1991 average daily expenditure for tourists from the UK (Anon.1992) for instance is most probably significantly influenced by a relatively large share of business travel in total UK tourist arrivals to Poland. The data on recent expenditures, moreover, provide no indication as to whether it is feasible to increase the number of arrivals from the envisaged origin countries while maintaining similar levels of expenditure.

Based on the fact that within the EC/EFTA there are at present IT offices in Germany (Cologne), the Netherlands (Amsterdam) with a subsidiary in Belgium (Brussels), and Sweden (Stockholm) it makes at first sight sense to open new IT offices in Great Britain (preferably London), Italy (preferably Milan) and France (preferably Paris). The assumption, however, has to be that the budget allocation for Germany should be at least 8 times that for France. Compliance with this condition would leave an insufficient amount in the 1994 proposed budget (Biedrzycki, 1993) to operate new IT offices in France, Italy and Britain. Consequently, unless the total budget allocation for marketing and promotion abroad can be substantially increased, it may be wiser to commission foreign PR firms to do the promotion for Poland in these foreign markets. The size of the Swedish market in that case certainly does not warrant maintaining an IT in that country, except if it can be considered to operate for not only Sweden but at least also Denmark.

The second question to be answered is what market segments should be addressed in order both to reach a substantial foreign demand effectively and enable a fit with existing and potential tourism supply in Poland. In view of the latter a possible match should be sought primarily with touring holidays and city holidays, which are with respectively 19 and 15 % of demand the second and third important types of holiday in Europe (after sun and beach

TABLE 11. EC and EFTA geographic target markets for Poland

Country	Catchment areas	Holidays abroad 1990 (000)	Share %
Germany	Whole country	47,870	44.4
Netherlands	Whole country	12,152	11.3
Britain	London, South East, Midlands	11,543	10.7
Belgium/Luxemburg	Flemish area, Brussels	9,906	9.2
Italy	North West, North East	6,433	6.0
France	Greater Paris, North	5,445	5.0
Austria	Whole country	4,174	3.9
Sweden	South, Greater Stockholm	3,955	3.7
Denmark	Whole country	3,420	3.2
Switzerland	Zürich, Midlands	2,984	2.8
Total		107,882	100*

Note : * Does not add up due to rounding
Source: Based on ETDC, 1991

holidays, which take 35 %). Poland is endowed with a variety of landscapes, historic cities and other national heritage, which would fit into the concept of touring holidays. Moreover, touring holidays are in line with the preferred means of transport, the private car, in many of the main European origin markets. For the UK which forms a notable exception, coach tours should be envisaged. Cities such as Warsaw, Krakow and Gdańsk are obvious candidates for a further development of city trips.

Apart from touring holidays and city breaks, on relatively nearby markets three other types of holiday should be marketed: recreational holidays in the countryside, for instance in the lake area (10 % of European demand), recreational holidays in the mountains (6 %), and snow holidays (6 %). In W.Germany these holiday types respectively appeal to 14, 7, and 7 % of demand; in the Netherlands to 9, 12, and 12 %; and in Belgium to 12, 13, and 6 % respectively (ETDC, 1991). A further development of the Scandinavian market could contribute to revitalising resorts at the Baltic coast. According to a 1991 survey by the Institute of Tourism (Anon., 1992) half the Scandinavians visited the Baltic coast. Relative emphasis in marketing campaigns and the allocation of promotional budgets should broadly follow these relative preferences in origin markets. This implies that, for instance, in the

Netherlands a relatively larger emphasis has to be put on promoting the mountain areas, both for summer and winter holidays, than on promoting holidays in the countryside, whereas the opposite applies to the W.German market. Following the relative preferences for these types of holiday existing in the various relatively nearby origin markets provides the best chances of success.
In determinating relative emphasis in marketing and promotion a factor seriously to be taken into consideration is the availability or non-availability of an adequate supply of facilities. Promoting types of holidays for which facilities do not yet exist is more costly than directing visitor flows to already existing but under-utilized facilities.

Concluding Remarks

In view of the actual and potential size of the domestic market due attention should be given in tourism product development to both the holiday demand of youth and that of families, particularly those with dependent children. The fact that the demand of the latter is expected to show a substantial increase within a few years implies that in taking steps to reconstruct the accommodation sub-sector according to the principles of a market economy it will be worthwhile to mothball for the time being those accommodation units which can be upgraded to meet the future demand of families. As to marketing the conclusion is also that due attention should be paid to the domestic market. This implies, for instance, that adequate funds should be made available to enable the operation of ITs in provincial capitals. The development of a healthy domestic tourism base is conducive to the development of foreign tourism.

An initial analysis of existing and potential tourism supply, together with the characteristics of foreign demand, indicate that Poland for its further development of foreign tourism from the EC-EFTA and some other countries should aim at touring holidays and city breaks. Three more types of holiday, recreational holidays in the countryside, recreational holidays in the mountains, and snow holidays, have a less wide geographic appeal but can be further developed with a view to relatively nearby markets such as those of Germany, the Benelux and Scandinavia.
The geographic allocation of the marketing budget and the relative emphasis in marketing on particular market segments in various origin markets should reflect the relative size of these geographic markets and market segments. The existing differences in relative size of origin markets has also obvious consequences for the opening of new IT offices abroad.

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ANNEX

Outbound travel from selected EC and EFTA countries according to origin region, 1990
(trips in thousands)

Note: 000's are grossed up estimates of adult trips (15 years and older)
Percentages based on number of answers.
Deviations from the Total or from 100 % are due to rounding

Source: European Travel Monitor, 1990

Austria

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Charter	Plane Scheduled	Coach	Train
	6397 100%	1131 100%	3043 100%	534 100%	1080 100%	1263 100%	2225 100%	2701 100%	3028 100%	989 100%	763 100%	1103 100%	869 100%
Marketing Region													
Vienna	1916 30%	246 22%	981 32%	191 36%	332 31%	381 30%	715 32%	731 27%	843 28%	370 37%	322 42%	232 21%	333 38%
East Area	2328 36%	397 35%	1138 37%	143 27%	403 37%	439 35%	837 38%	995 37%	1066 35%	295 30%	270 35%	445 40%	311 36%
West Area	2154 34%	488 43%	925 30%	200 38%	345 32%	442 35%	673 30%	975 36%	1120 37%	324 33%	171 22%	425 39%	225 26%
DK/No answer	- -	-	-	-	-	-	-	-	-	-	-	-	-

Vienna - <Wien>
East Area - <Niederoesterreich,Burgenland,Steiermark,Kaernten + Osttirol>
West Area - <Oberoesterreich,Salzburg,Tirol ohne Osttirol,Vorarlberg>

Belgium

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Busi-ness (1+ N)	Inclu-sive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Char-ter	Plane Sche-duled	Coach	Train
	16480 100%	3066 100%	9399 100%	562 100%	2112 100%	3515 100%	5925 100%	6808 100%	8489 100%	1956 100%	1827 100%	2356 100%	1433 100%
Marketing Region													
Brussels	1492 9%	325 11%	674 7%	45 8%	241 11%	156 4%	452 8%	805 12%	794 9%	129 7%	161 9%	96 4%	259 18%
Flemish Area	11581 70%	2043 67%	6864 73%	294 52%	1514 72%	2823 80%	4651 78%	4004 59%	5662 67%	1548 79%	1400 77%	1851 79%	805 56%
French Area	3406 21%	698 23%	1861 20%	223 40%	357 17%	535 15%	822 14%	2000 29%	2033 24%	278 14%	265 15%	409 17%	369 26%
DK/No answer	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -

Brussels - <Bruessel>
Flemish Area - <Westflandern,Ostflandern,Antwerpen,Limburg,North Brabant>
French Area - <Hainaut,South Brabant,Liege,Luxembourg,Namur,Grande Duche de Luxembourg>

Denmark

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Busi-ness (1+ N)	Inclu-sive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Char-ter	Plane Sche-duled	Coach	Train
	5888	414	3006	424	1613	1435	2892	1412	2175	975	1250	855	673
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Marketing Region													
Copenhagen and Zealand	3248	202	1656	222	911	724	1657	767	1004	582	871	381	461
	55%	49%	55%	52%	57%	50%	57%	54%	46%	60%	70%	44%	68%
Jutland and Funen	2639	212	1350	203	701	712	1235	645	1171	393	379	475	212
	45%	51%	45%	48%	43%	50%	43%	46%	54%	40%	30%	56%	32%
DK/No answer	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

Copenhagen and Zealand - <Copenhagen,Counties of Copenhagen,Frederiksborg,Roskilde,
Rest of Zealand,Lolland-Falster,Bornholm>
Jutland and Funen - <South Jutland,Central Jutland,East Jutland,
North-West Jutland,North Jutland,Funen with Islands>

France

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Charter	Plane Scheduled	Coach	Train
	14756 100%	1424 100%	8710 100%	544 100%	2369 100%	3707 100%	6010 100%	4382 100%	5549 100%	2024 100%	5028 100%	2636 100%	1817 100%
Marketing Region													
Greater Paris	5292 36%	284 20%	3152 36%	268 49%	1028 43%	1063 29%	2774 46%	1098 25%	1913 34%	752 37%	2145 43%	705 27%	882 49%
North Area	2711 18%	471 33%	1538 18%	107 20%	217 9%	782 21%	615 10%	1158 26%	1143 21%	327 16%	715 14%	490 19%	265 15%
West Area	1597 11%	214 15%	987 11%	45 8%	250 11%	582 16%	570 9%	426 10%	538 10%	424 21%	376 8%	383 15%	136 7%
East Area	1931 13%	162 11%	1256 14%	55 10%	301 13%	591 16%	646 11%	611 14%	687 12%	202 10%	623 12%	423 16%	184 10%
South Area	3215 22%	293 21%	1768 20%	69 13%	574 24%	679 18%	1405 23%	1090 25%	1267 23%	320 16%	1158 23%	635 24%	349 19%
DK/No answer	10 *	- -	10 *	- -	- -	10 *	- -	- -	- -	- -	10 *	- -	- -

Greater Paris - <Region Parisienne>
North Area - <North Picardie,Lorraine,Alsace,Champagne>
West Area - <Normandie,Bretagne,Pays de Loire,Centre,Poitou>
East Area - <Bourgogne,Franche-Comte,Rhone Alps,Auvergne,Limousin>
South Area - <Aquitaine,Pyrenees,Languedoc,Provence>

Germany (W)
(Excluding trips to East Germany)

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Charter	Plane Scheduled	Coach	Train
	58777 100%	8011 100%	39859 100%	4741 100%	4720 100%	20529 100%	12256 100%	25992 100%	32722 100%	9015 100%	8205 100%	14576 100%	5747 100%
Marketing Region													
North and Berlin	11047 19%	1107 14%	7754 19%	871 18%	996 21%	4196 20%	2619 21%	4231 16%	5327 16%	1997 22%	2265 28%	2841 19%	1288 22%
West Area	16738 28%	2023 25%	11855 30%	1239 26%	1318 28%	6251 30%	3302 27%	7185 28%	9467 29%	2987 33%	2094 26%	3830 26%	1500 26%
Central Area	9233 16%	1079 13%	6487 16%	666 14%	908 19%	3395 17%	1833 15%	4005 15%	5213 16%	1179 13%	1327 16%	2350 16%	955 17%
South West Area	9321 16%	1546 19%	5996 15%	813 17%	672 14%	2633 13%	1923 16%	4766 18%	5782 18%	1081 12%	1158 14%	2084 14%	991 17%
South East Area	12438 21%	2256 28%	7767 19%	1152 24%	827 18%	4054 20%	2579 21%	5805 22%	6934 21%	1770 20%	1362 17%	3471 24%	1013 18%
DK/No answer	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -

North and Berlin - <Berlin,Bremen,Schleswig-Holstein,Hamburg,Niedersachsen>
West Area - <Nordrhein-Westfalen>
Central Area - <Hessen,Rheinland-Pfalz,Saarland>
South West Area - <Baden-Wuerttemberg>
South East Area - <Bayern>

Great Britain

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Charter	Plane Scheduled	Coach	Train
	26665 100%	2357 100%	18157 100%	779 100%	3599 100%	11447 100%	11651 100%	2298 100%	6720 100%	8358 100%	9703 100%	3652 100%	1415 100%
Marketing Region													
London and South East	10866 41%	1192 51%	6942 38%	474 61%	1417 39%	3481 30%	5408 46%	1275 55%	2389 36%	2666 32%	4396 45%	1183 32%	732 52%
Central England	4449 17%	288 12%	3121 17%	111 14%	599 17%	2180 19%	1758 15%	305 13%	1209 18%	1371 16%	1634 17%	617 17%	227 16%
North England	6752 25%	613 26%	4531 25%	98 13%	1202 33%	3319 29%	2773 24%	473 21%	1884 28%	2745 33%	2238 23%	1141 31%	259 18%
South West Area	2772 10%	172 7%	2122 12%	60 8%	227 6%	1436 13%	1088 9%	123 5%	814 12%	730 9%	868 9%	544 15%	80 6%
Scotland	1825 7%	91 4%	1441 8%	37 5%	154 4%	1030 9%	623 5%	121 5%	424 6%	846 10%	567 6%	167 5%	117 8%
DK/No answer	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -

London and South East - <London,Southern,Anglia>
Central England - <Central (Midlands)>
North England - <Granada (Lancashire),Yorkshire,Tyne Tees>
South West Area - <Harlech (Wales),South West>
Scotland - <Border,Scotland Central,Scotland>

Italy

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Charter	Plane Scheduled	Coach	Train
	13430 100%	2052 100%	7957 100%	848 100%	1925 100%	2670 100%	6105 100%	4644 100%	5918 100%	1049 100%	3121 100%	1980 100%	1666 100%
Marketing Region													
North West Area	5027 37%	859 42%	3087 39%	177 21%	712 37%	1013 38%	2229 37%	1786 38%	2427 41%	386 37%	1098 35%	729 37%	466 28%
North East Area	3432 26%	611 30%	1876 24%	322 38%	448 23%	674 25%	1402 23%	1355 29%	1789 30%	321 31%	556 18%	502 25%	396 24%
Central Italy	2522 19%	238 12%	1643 21%	120 14%	453 24%	486 18%	1270 21%	756 16%	949 16%	181 17%	886 28%	300 15%	254 15%
South and Islands	2450 18%	344 17%	1351 17%	229 27%	312 16%	497 19%	1205 20%	747 16%	753 13%	161 15%	580 19%	449 23%	550 33%
DK/No answer	-	-	-	-	-	-	-	-	-	-	-	-	-

North West Area - <Piemonte,Ligurien,Lombardia,Valle d'Aosta>
North East Area - <Trentino-Alto Adige,Veneto,Friuli,Emilia-Romagna>
Central Italy - <Toscana,Marche,Umbria,Lazio>
South and Islands - <Abruzzi,Molise,Campania,Puglia,Basilicata,Calabria,Sicilia,Sardegna>

Luxemburg

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Charter	Plane Scheduled	Coach	Train
	398	25	243	7	39	68	152	174	242	8	40	76	28
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Marketing Region													
All Luxembourg	398	25	243	7	39	68	152	174	242	8	40	76	28
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
DK/No answer	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

Luxembourg - <All Luxembourg>

Netherlands

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Busi-ness (1+ N)	Inclu-sive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Char-ter	Plane Sche-duled	Coach	Train
	16679	2008	10144	734	2744	3344	4667	8373	9838	1316	2699	2132	1433
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Marketing Region													
West Area	8896	1008	5433	318	1593	1888	2646	4189	4833	895	1724	1044	889
	53%	50%	54%	43%	58%	56%	57%	50%	49%	68%	64%	49%	62%
North Area	1301	162	806	65	181	217	338	733	794	46	135	176	141
	8%	8%	8%	9%	7%	6%	7%	9%	8%	4%	5%	8%	10%
East Area	2691	287	1732	145	338	531	738	1393	1696	166	355	399	191
	16%	14%	17%	20%	12%	16%	16%	17%	17%	13%	13%	19%	13%
South Area	3789	551	2173	205	632	708	946	2058	2515	208	485	512	211
	23%	27%	21%	28%	23%	21%	20%	25%	26%	16%	18%	24%	15%
DK/No answer	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-

West Area - <Amsterdam,Rotterdam,Den Haag en agglomeraties>
North Area - <Friesland,Groningen,Drente>
East Area - <Overijssel,Gelderland>
South Area - <Limburg,Noordbrabant,Zeeland>

Sweden

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Charter	Plane Scheduled	Coach	Train
	10804	1894	4300	384	3052	2116	6246	1691	3384	2065	2450	1056	557
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Marketing Region													
Greater Stockholm	2749	382	1093	65	985	538	1711	403	556	645	948	80	137
	28%	22%	27%	17%	36%	27%	30%	26%	18%	32%	43%	8%	26%
South Area	4068	801	1679	144	1033	773	2402	605	1497	734	760	457	204
	41%	46%	42%	38%	38%	39%	42%	39%	48%	37%	35%	46%	39%
Central Area	1730	280	663	83	466	356	943	242	601	299	243	297	91
	17%	16%	16%	22%	17%	18%	16%	16%	19%	15%	11%	30%	17%
North Area	1433	283	596	89	255	339	678	309	446	314	235	161	90
	14%	16%	15%	23%	9%	17%	12%	20%	14%	16%	11%	16%	17%
DK/No answer	825	147	268	3	312	110	512	131	283	72	264	60	36
	8%	8%	6%	1%	10%	5%	8%	8%	8%	4%	11%	6%	6%

Greater Stockholm - <Greater Stockholm Area>
South Area - <South Sweden,Greater Malmoe Area>
Central Area - <West Sweden,East-middle Sweden,Greater Gothenburg Area>
North Area - <North Sweden,North-middle Sweden>

Switzerland

	TOTAL	PURPOSE OF TRIP				ORGANISATION			TRANSPORT USED				
	All Trips Abroad	Short Holiday (1-3 N)	Long Holiday (4+ N)	VFR (1+ N)	Business (1+ N)	Inclusive Holiday	Other Pre-Booked	No Pre-Booked	Car	Plane Charter	Plane Scheduled	Coach	Train
	7512	1003	4549	397	1141	1245	3408	2762	3220	778	1981	571	1362
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Marketing Region													
Zurich and Midlands	4122	429	2555	180	747	697	1914	1461	1596	435	1302	329	685
	55%	43%	56%	45%	65%	56%	56%	53%	50%	56%	66%	58%	50%
French Area	1929	289	1154	147	203	227	916	774	927	194	394	76	417
	26%	29%	25%	37%	18%	18%	27%	28%	29%	25%	20%	13%	31%
Alps and Pre-Alps	1462	284	840	70	190	321	578	526	698	149	285	165	260
	19%	28%	18%	18%	17%	26%	17%	19%	22%	19%	14%	29%	19%
DK/No answer	-	-	-	-	-	-	-	-	-	-	-	-	-

Zurich and Midlands - <Westmittelland,Ostmittelland>
French Area - <Westschweiz>
Alps and Pre-Alps - <Alpen,Voralpen>