MARKETING AND PROMOTION
WORKING PAPERS NO 5, 6 AND 7

TOURISM IN POLAND
A GLOBAL OUTLINE FOR A STRATEGIC MARKETING PLAN

A MARKET SEGMENTATION MODEL FOR POLAND

THE DUTCH HOLIDAY MARKET FOR POLAND
A global analysis

by

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Warsaw, February 1994

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Introduction

Marketing a country as a tourist destination has, from an economical point of view, two major objectives.
The first is to stimulate tourist spendings, the second -and related to the first- is to stimulate employment.
The national economy benefits from both.
For effective marketing it is essential that the tourist product in all its aspects can fulfill the expectations and the needs of the consumer. Only than tourism promotion as an instrument to increase tourism demand is relevant and will be effective.

In this paper a variety of subjects will be dealt with. Subjects which should be included in a strategic marketing plan for Poland and in which promotion will be placed in the central position (marketing and promotion as words both being used for the same thing/activity).
Such a strategic marketing plan (hereafter shortened to SMP) is necessary to have because it acts as the umbrella that outlines the promotional policy.
Tourism promotion is only than effective when it is being executed in a systematic and consistant way.
Systematic e.g. on the markets to operate on, consistant e.g. in the themes and messages to communicate and the mix of instruments to use.
Systematic and consistant implicit by nature a policy for a longer period.
The annual marketing plans are to be seen as the detailed and if necessary more flexible translation of the general approach.
The SMP also formulates the targets to reach and the financial means that will be made available for that.
Without a SMP it is very likely that sub-policies will diverge and thus hinder the synergy wished for.

It is clear that a SMP can function too as a reference source for all other types of activities that have to be taken care of for tourism development in a well balanced way. To mention here are e.g. investments, regulations, the level of service, education, classification and joint cooperation.

It has to be stressed that the subjects dealt with hereafter are in many aspects interrelated. In order to make them more easy to handle they were "parted" and can so become more functional in the final drafting of the plan. The subjects are clustered in the chapters that a SMP could be made of.

For a good understanding on that it should be mentioned that a plan is just a plan and a plan can only work when those involved in the implementation accept its relevance. That demands for discussion in advance with all parties interested in the execution.

CHAPTER I

The present situation

The present situation contains the analysis of where the country stands as a tourist destination. That means that it mainly deals with relevant statistical information on demand. Statistics on volumes in persons, holidays, arrivals, nights, spending, used types of accommodation and areas visited, preferably by country and/or groups of countries of origin. The data are better to be understood if the historical development over the last five or ten years is included. By doing that the average levels of increase and decrease are found and thus act as the first step for analysis towards the future. In this respect it will also enable the user to compare the national developments with the developments in competing countries.

Remark 1)
Given the change of the situation in 1990, available historical data may be less relevant for use today. The first Polish SMP will have to be founded on a shorter period, e.g. from 1991 on.

Remark 2)
What is presently available on data is insufficient for the users needs. In order to solve this problem for a second SMP, it is advisable to formulate a research policy, to be implemented as soon as possible.
For a good understanding it has to be mentioned here that the results of registration and research will also be extremely important for investors and tourism policy in general.
For the registrational aspect information could be obtained from WTO and Eurostat and for reciepts on currency from IMF.

Remark 3)
From a marketing point of view information on holidaymaking has the first priority. Business-travel, making cross-border daytrips for shopping and visiting friends and relatives have a positive economic value, but can hardly be promoted. The purpose for travelling here is based more on rational decisionmaking and the competitive aspect does not exist.
Within business-travel only the segment of "meetings, conventions and incentive travel" (MCI) has a link with tourist promotion.

Remark 4)
A clear division should be made between domestic tourism and incoming tourism. In most countries domestic tourism generates at least 80% of all nights spent. The economic value may be less, but the spational spread and the use of accommodations in periods outside the high season for incoming tourism make that domestic tourism has to be regarded as a separate market for promotion.
Additional necessary data for regional use in particular can be available from national holiday surveys.

CHAPTER II

Future developments

Tourism is not static. It is influenced by mega trends in the society in general. The "health-orientation" presently to be seen stimulates more active and sportive holidays. "Cocooning" may have a negative influence on package holidays. More interest in culture and history (heritage!) can be the result from a trend of "back to the basis/back to the past". Environmental consciousness is rapidly becoming more and more important and will influence demand too.

The changes as mentioned above are different from e.g. trends in demography, economy and technology.
But the tourist industry itself also gives way to changes to be expected. The system of Formule 1 in hotelaccommodation in France is an example, just as the development of big reservationsystems and the takeovers of smaller touroperators by big ones. The integration of touroperating and travel agencies is yet another development, just as the liberalisation of airfaires and the abolition of systems of cabotage.

All these developments will influence demand and profits, though the speed may be different and the results conflicting.
In a SMP for Poland the major ones should be analyzed for formulating the national policy. In particular those which relate to the position of Poland more than averagely should be looked into in order to see if special measures are needed.

From the marketing side the general conclusion should be based on the fact that tourism demand will increase on a lower level than in the past. Signs of saturation can be seen already and the tourist of today has become mature. He demands for quality, variety and authenticity. He is aware of his value and looks for the best price/quality ratio. As governments are more and more aware of the importance for the national economy, the competition between countries and regions will intensify strongly. To gain an acceptable share of the demand-volume means that marketing with limited financial funds should be based on segmentation and effectiveness, how difficult in practice to execute.

CHAPTER III

The position of Poland

Though Poland has a longstanding history in tourism, the recent history demands for a new orientation towards the future.
The objective to stimulate tourism demand is limited by what is presently supplied on one side and the lower level of growth in tourism and increasing competition at the other side.
The volume and quality at the supply-side today does not stand to modern needs. The dilemma is that the costs to make the necessary changes must be financed by the revenues of tourism, but the economic benefits from tourism will be difficult to obtain as long as the product is not competetive enough.
A policy of small steps forward would thus be logical, but is undesirable within the general policy to quickly increase the economy and the standards of living of the Poles.

In available literature already much has been said on what should be done. The weaknesses of the product (and which includes services) are clear. As relatively many weak aspects exist the complementary strenghts are yet few in number.
This maybe not so very optimistic analysis on the supply-side is fortunately not to the same extent the case in the analysis on demand. Opportunities and threats both exist, but are better balanced.
One of the main opportunities can be found in the fact that the overwhelming majority of international holidaymakers in Europe is unfamiliar with Poland as tourist destination.
Curiosity and the human nature preferring a change from the well known and visited countries is a major potential asset.

The complementary threat of product-dissatisfaction and consequently not revisiting Poland for many years and complaining to friends and relatives at home should however be realized here.
In general it is said that a positive experience is told to ± 6 other persons and a negative one to ± 20 !
From the border survey of the Tourism Institute one can learn that averagely 80% of the tourists say that they wish to visit Poland again, though not when and not how really. In priciple this figure should be higher and at least exceeding 90%.

A second threat in this segment of curious tourist is that the opportunity for Poland applies too for at least presently the former GDR, the Czech Republic, Slovakia and Hungary.

A second relevant opportunity has to do with changes in consumer preference, as e.g. being more active and sportive. There is a parallel in southern-Europe-tiredness and the wish not to travel over very long distances by private car. All these reasons have resulted into more tourism within the countries in at least north-western Europe. From these facts it is to be seen that Poland has basically a competing offer available and can in addition claim that given its climate has advantages.

A third opporunity, but questionably for how long, lies in the comparatively low pricelevel.

Remark 1)
In order to stimulate demand it is not only important to know what the purposes for coming are for already visiting tourists. It will be necessary to find what the image of Poland is with potential tourists in order to create a good global message to communicate. The image of Poland for many of them will be rather vague yet.

CHAPTER IV

Strategic choices

In principle the whole world is the market for stimulating tourism to Poland.
In practice of course a limitation is needed. Selection should take place and be based on the promotional funds available and the volume of demand. As for the volume of demand two aspects are relevant: the present volume and the potential volume.
Within the present volume at least should be decided upon the share that comes even without promotion, though that does not mean that no promotionial efforts are necessary. To think here on religious travel and travel by tourists of Polish origin.
To be effective demands for concentration. Marketing is making choices. Making choices means, how unfavourable for some, that it is acceptable that even some promising countries will, at least in the beginning phase, have to be excluded from promotion.

In the above "volume" has been the keyword for decisionmaking. In addition the economic revenues should be included. Though they are related, they may lead to different conclusions. One could state that total spending is more important, but than one has to realize that it is extremely difficult to change the structure of demand to more spending tourists. If Poland has the best chanche to increase the volume of medium-spenders (and that will probably the majority) than it is more effective to increase their number in stead of concentrating on a a high spending minority.

Markets

Given the available figures it is relevant to formulate the countries where Poland has to target its marketing.
Based on participation, holidays abroad, travel behaviour and volume, potential volume and spending, the following list is composed:

1: Germany
2: Sweden+Denmark, Belgium+Holland, United Kingdom
3: USA
4: France
5: Italy

Given the limited funds and costs it is advisable:

a) Not to do everything at the same time, so to increase the number of countries to market step by step;
b) Not to market in countries where no adequate follow-up is taken care of;

As for the money to invest per market there is no general rule how much that should be. The most logical way would be to divide the money according to existing volumes and spending, above a basic amount for operational costs as salaries, rent, travel etc.
But there are more elements in the decision how much should be spent:

- the autonomous demand that does not need to be promoted to come
- the prospect of increasing the volume (potential demand)
- competition with other countries
- phase of market development
- costs of marketing
- the level of participation and interest with the national industry
- the level of activity by the industry on its own

These different elements as additional input, and also of a more qualitative nature, can hardly be included in a quantitative model to decide where the money should be spent best.
They can however be taken into account in the rationalizing where the accents should be laid and in the decision where to spend more or where to spend less.

Positioning

Though segments for marketing are formulated, it is relevant to formulate in "a single sentence" what makes Poland worth to visit. This "positiong" has as the objective to act as the umbrella for the relevance to market as a tourist destination. The consequent use before going in depth into the actual execution wil thus become the basis to work from.
For the positioning it is necessary to think of what makes Poland unique, in what way is Poland different from any other country, what is its global intrinsic attractivity for foreigners to decide to visit the country.

Remark 1)
As an idea one could think of "Poland is the bridge between western and eastern Europe".
It refers mentally to
a) distance,
b) a different culture,
c) history.
It has parallel relationships with the countries marketed and with changes in consumerbehaviour and megatrends.

Priorities

Though priorities can be of a qualitative nature, for Poland the following fields and aspects for marketing have the main priority.

1) Cooperation with the tourist industry in Poland
The Polish tourist industry is the backbone for successful marketing. They have to "carry" the national marketing as the important tool to stimulate demand from abroad. Carrying includes the development of new products and combinations of products as well as the partial financing of marketing projects.

2) Dividing tasks between central and decentral organisations
It is understandable that every city and region wants to have more tourists, and it is good that they allocate budgets for that. Howevere, when all we operate by themselves, the result will be ineffective. Ineffective in communication and in costs. Joint marketing via a experienced organisation with knowledge of the markets of operation is the solution for this. Regions and cities should realize that "when it is raining tourists" all will benefit, depending of course on the attractivity of the area and the type of tourist. The platform that SSTA establishes should thus become the door via which promotion abroad is handled.
As a national institution SSTA should be neutral on domestic tourism, possibly only providing some additional support. The regions and cities should concentrate there own marketing on the domestic market. If a region is not interested in that, it should be its own decision and responsability.

3) Main summer holidays
As Poland is for many potential tourists from abroad an unknown destination, the greatest chance in stimulating demand is in focussing on the main longer summer holidays. After having been sucessful the season can be extended by stimulating the shoulder seasons for second holidays.

Marketing policy

Apart from what is relevant here and has been written already above, some remarks can be made on the use of the various instruments in the promotional mix.

1) Consumer advertising
Advertising is in general an expensive promotional method. It should be used very selectively and only than when it is necessary to contact a broad potential audience of tourists. Given that, it is best that if consumer advertising will be done, to do so in the neighbour countries, as they deliver the majority of visitors.
Even than it is advisable to concentrate on those newspapers and magazines that have a readership that can be expected to be interested in Poland more than averagely. Based on the defined segments the decision should be made, preferably with the help of an experienced advertising agency in the country where the advertisements will be placed.

2) Free publicity
As advertising will be impossible on many markets, a good alternative is to stimulate articles on Poland in general and on special Polish tourist "products" by inviting foreign journalists. Compared to the costs for advertising the investment is much smaller and the promotional value much higher.
The Tourist Information Centres are the ones who know who to invite (as not every journalist stands to the required quality) and they can evaluate the result of the trip too.
It is advisable that the job of handling foreign tourists is taken care of by a specialized employee at SSTA. He has to know the needs of journalists and have contacts with carriers, hotels, regional tourist offices etc. to handle the trip affectively, including making the program and partial accompanying the guest.
In addition it is good that the offices abroad have a regular newsletter to be sent (e.g. four times a year) to all the travel journalists in their country. In this newletter all the real new and noteworthy information and probably an in depth article on a specific subject as annex.

Sometimes special press conferences can be held, but they should only be organized when there is really something to inform on.
This means that if it is decided that a press conference should be held, that in advance one has to think of the value of the news for journalists for publishing. If that is not the case they will not come for a second time and the instrument has lost its relevance.
There are already too many of this kind done in the incorrect way to make journalists rather shy in attending them.

3) Consumer information
In general about two-thirds of all the people who ask for tourist information have already decided to visit the country. This means that the information is not really promoting a visit, but can be regarded as aftersales factual information and as proof for the right decision already made.
This should be memorized in the making of brochures and leaflets.
The costs of printing lay a heavy burden on the organisation, including storing and postage.
It is advisable to create a system by which these costs are controlable, as they have the tendency to end higher than budgetted. In combination with this one must realize that the costs for handling the request increase strongly when too many items are placed on the shelves. A strict and limited number of titles should be available. If someone wants more his request should be forwarded to the body that has this special information.
It might be relevant to distribute tourist information on Poland via embassies in those countries where no office abroad is.

4) Educationals
In order to stimulate the selling of package trips to Poland it is important that they who make them, the touroperators, and they who sell them, the travel agencies, have a sufficient knowledge on what Poland has to offer. This can be done via Trade Manuals and "Polish newsletters for the trade" but via familiarization trips as well. This stimulates the prepardness to sell and the quality of selling. The selection of participants is the responsability of the offices abroad, where they have to be selective as sometimes not the persons wished are attending.

5) Sales missions/workshops
For national marketing as an intermediate it is important that the tourist industry establishes good and frequent contacts with the industry in other countries. For that reason sales missions and workshops are relevant, when well organized and executed.

6) Fairs

a) Consumer fairs
The use of fairs is always under discussion. The costs are high and the results are difficult to measure. The "fair-industry" tries to earn money for themselves and for that more and more regional tourist fairs are available. They exploit the fear that being not present gives negative publicity ar that the visitors will decide for another country or area.
The question is if they really bring customers. As Poland has to create its position, one could argue that it is good to be present at many of them. The low marketshare of Poland presently indicates that only a very small fraction of the visitors can be regarded as real prospects.
This is important, but it is important too that the present type of tourist to Poland is of the kind that finds his way after decisionmaking quite easily by himself and thus it is not very likely that he will only be attracted to the country when they have a stand at the fair.
For that reason it is advisable to be present only at the biggest national fair that has established its value over years. Information on the visitor profile of that fair must form the base to decide upon attendancy. Only in Germany some additional fairs are possible.

b) Trade Fairs
What has been said on the selection for consumer fairs is to be kept in mind on having a stand at a trade fairs. The big, well known ones, as e.g. ITB, WTM, Mitcar and BIT, are unquestionably to be attended.
For the minor ones one could argue that it might be better not to be present with a stand, but to visit in person after a pre-organized schedule with appointments.

In the above there has been made a clear distinction between promotion to the consumer and trade promotion.
This should be kept in mind and included in the decisionmaking where to go and how much to spend.
All has to be included in the annual marketing plan that should be ready in september for planning and execution beginning in December.
It is als the base to decide what to do and what to skip from the program.
Skipping is never very popular, but a lot of money has so continued to go into actions no longer relevant. It has also meant that new activities could not be boosted to the proper value, lacking new funds.

Within the marketing policy, relating to new activities, it is relevant to see of events and themes can be included as extras to what is taken care of in the normal approach and segmenting.

Research

For marketing it is essential that per market data are available on the holiday structure per country with an abroad office.
This surveys only give the global picture on otbound travel, volumes and trends, but as the share of Poland is very small, they cannot inform on the specific structure of demand for Poland. The net sample size is insufficient.
For that one has to have the border surveys. They inform on structure, behaviour, motives and satisfaction.
However, they do not inform on potential demand, on competition and on gaps in information where communication is essential. For the main markets image surveys are thus necessary.
All these data form a picture in combination with what has to be registered on arrivals, nights, spending.
It is possible that for specific countries additional information is needed, e.g. on people with a Polish origin, religious travel etc.
Al the information above belongs to the area of monitoring research. A second area is that of measuring the effectiveness and evaluation. There are three reasons for including this research.
The first is to find of the activity was successful and if not how to change it. The second is to stimulate the industry to participate and pay for next time. The third reason is that it is important to show to the Government that the money has been well spent.
As for eveluation the information is of an internal nature. How many journalists have come and how many articles were published, how many questions for information were received and how much did that cost. What is the number of participants and how much did they pay for their participation.
As for measuring effectiveness aspects as the number of coupons of an advertisement were received, what is the result of the questionnaires that were sent to people who asked for information ("client research") and what is the level of satisfaction of the industry on SSTA performance.

The third group of research projects is more basically for marketing policy in future. One can think of research on aspects as classification, seasonality, environment, voice-response systems etc.

MARKETING AND PROMOTION - WORKING PAPER No 6

A MARKET SEGMENTATION MODEL FOR POLAND

by

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I Introduction

For effective marketing it is extremely important that the available tourist product and existing and potential tourism demand are connected as closely as possible.
However: the tourist product of a country as destination is the sum of a variety of sub-products, ranging from accommodation and infrastructure to monuments and landscape. The same applies for tourism demand. It can be broken down into aspects as e.g. preferred types of lodging, motives for travelling and areas visited.
Given this it is necessary to formulate relevant sub-connections or segments. A segment is only than valid when it can be regarded as a clearly recognizable supply-demand relationship that is different to other relationships.

Practice has learned that in marketing it is better to concentrate on those segments that have the biggest chance of being succesfull within a short period when the offered product is new to the consumer. Poland today can as a destination for many tourists be regarded as such a new possible product "to consume".
This means that it is advisable to concentrate first on major segments and after possibly five or ten years to define additional (smaller) ones. (niche-marketing)
As the new organization of Polish tourism marketing is in progress but young, it is also logical to concentrate in the beginning on a number of segments that can be overseen.
For the execution of marketing activities it is also more easy to use not too many segments if they can be used in more countries of origin collectively.

II The Polish tourist product

Tourists visit a country for what it has to offer. That can be because the country is unknown to them and they are curious or that it has specific unique elements which they want to see themselves. It is also possible that they are already familiar with the country but as they prefer the product so much they become repeatvisitors. The question now is of what the Polish tourist product is made of and what can be communicated in marketing.

In principal Poland has four major recognizable products to offer to the tourist:

- the Baltic coast (COAST)

- the mountains in the south (MOUNTAINS)

- the Mazurian lakes (LAKES)

- the towns with historic monuments (CITIES)

For each of these four products specific interested tourists can be found and stimulated to come. As however many potential visitors are unfamiliar with them but they have the urge to get to know the country, a fifth product can be formulated:

- touring the country and get acquinted with the variety it offers

The last "product" (TOURING) is relevant too because for the first four there are competing alternatives in other countries available. The combination however can be the needed added value in the decisionmaking process for potential tourists.

III.1 The tourist product per market

In the analysis to asses which products are relevant for which country in future marketing, it would be necessary to include information on the level of interest of potential tourists.
As this information is not available (it could be made available by image surveys to be carried out in the various countries) the only source lies within the border surveys carried out by the Tourism Institute. For that it has than to be accepted that in principle the structure of present demand is parallel to future demand.
Presumably this will be true, at least for the first years to come.

III.2.1 The Baltic coast

As for the areas visited the following ranking on "coast" can be made, where the percentage refers to the share per country of origin that visited the coast. For reference the percentage of visits to Gdansk is mentioned too. In the third column a "weight" is given to the value of demand.

Table 1

COAST	Percentage "coast"	Percentage "Gdansk"	Weight
Denmark	55	24	++
Sweden	55	24	++
Belgium/Holland	38	34	+
Germany	26	14	+
Italy	25	12	o
Czech rep.	25	2	o
Slovakia	25	2	o
United Kingdom	20	18	o
USA	13	11	-
Austria	13	4	-
France	9	5	--
form. USSR	6	2	--

Related to activities during the stay the figures show no additional relevant information that can be included.

III.2.2 The mountains in the south

As there are no figures available for significant city a reference-column is not included.

Table 2

MOUNTAINS	Percentage "mountains"	Mountain walk/climb.	Weight
France	26	8	++
Italy	18	n.a.	+
Czech. rep.	18	1	+
Slovakia	18	1	+
Austria	17	1	o
USA	15	n.a.	o
Germany	14	13	++
United Kingdom	14	2	o
form. USSR	11	1	-
Denmark	8	3	-
Sweden	8	3	-
Belgium/Holland	6	1	--

Te activity "walking and climbing in the mountains" shows only a significant difference for France and Germany, compared to the other countries of origin.

III.2.3 The Mazurian lakes

As there are no figures available for significant city a reference-column is not included.

Table 3

LAKES	Percentage "lakes"	Weight
Germany	12	++
Italy	10	+
Czech. rep.	10	+
Slovakia	10	+
Sweden	10	+
USA	10	+
Denmark	10	+
United Kingdom	7	o
form. USSR	4	-
France	4	-
Austria	4	-
Belgium/Holland	2	--

Related to activities during the stay the figures show no additional relevant information that can be included. Only for Austria being active during the stay in the area of lakes and forests shows a positive deviation.

III.2.4 Towns with historic monuments

In the first column for ranking the percentages are counted per country of origin on visits to Warsaw, Cracow, Wroclaw and Poznan and the sum divided by 4. As reference the visiting to central Poland gives some information.

Table 4

CITIES	Percentage "cult.cities"	Percentage "centr.Poland"	Weight
Belgium/Holland	23	55	++
United Kingdom	23	66	++
France	21	65	+
USA	17	49	+
Austria	17	49	+
Italy	16	73	o
Germany	15	37	o
form. USSR	12	65	-
Denmark	10	41	-
Sweden	10	41	-
Czech. rep.	8	73	--
Slovakia	8	73	--

Related to activities during the stay the figures show no additional relevant information that can be included, especially as the reasons for visiting towns are for the purpose of this analysis too general.

III.2.5 Touring the country

For reference the percentages of the areas visited are counted together, assuming that touring is implicit to visit more than one area. The level of the sum above 100% thus indicates touring too.

Table 5

TOURING	Percentage "touring"	Percentage "areas visited"	Weight
Belgium/Holland	27	107	++
France	16	135	++
Sweden	15	120	+
Denmark	15	120	+
Germany	11	115	o
Austria	11	103	o
United Kingdom	9	133	o
Italy	8	142	-
form. USSR	8	91	-
Slovakia	4	142	--
Czech. rep.	4	142	--
USA	n.a.	100	n.a.

III.3 The global overview

The rankings per product as showed in III.2 are combined here to inform on which segment per country the marketing activities should be focused most.

It is not possible to combine them together in one symbol in order to create a prioritylist for the decision which countries are more or lesser important. The elements are of a different nature.

The conclusion that certain products need not to be included in the marketing in a specific country because they are ranked with a "-" or a "--" is incorrect. The approach is of a relative nature and for reasons of policy it might even be important to stress them in order to stimulate new demand.

Table 6

COUNTRY	RANKING				
	COAST	MOUNTAINS	LAKES	CITIES	TOURING
Germany	+	++	++	o	o
United Kingdom	o	o	o	++	o
Italy	o	+	+	o	-
France	--	++	-	+	++
Belgium/Holland	+	--	--	++	++
Denmark	++	-	+	-	+
Sweden	++	-	+	-	+
Austria	-	o	-	+	o
USA	-	o	+	+	
Czech. rep.	o	+	+	--	--
Slovakia	o	+	+	--	--
form. USSR	--	-	-	-	-

Table 6 shows that in Germany the accent should be put on the three types of the Polish landscape. To a lesser extent the same applies for tourists from the Czech republic and Slovakia.
The tourists from the United Kingdom are quite neutral towards Poland, though cities/culture history could be the theme to be used as the umbrella for marketing.
It is remarkable that touring for the Italians scores low, as the Italians are keen "tourers" with e.g. campers.
Cities and touring are relevant for the Dutch, Belgians and the French, just as the coast for the Scandinavians.
An explanation for the "++" on mountains for the French is a bit difficult to give.
The tourists from the USA follow more or less what can be expected.
As for tourists from the former USSR the same applies as what was said for the United Kingdom, only that no really positive product could be selected to use as the necessary umbrella.

IV.1 Tourism demand

As to which groups of tourists in the various countries the five products of chapter III should be promoted demands that per product a consumerprofile *) should be available. Because this is not the case only the figures for the countries of origin as a whole can be used. The differences in the "horizontal" comparison will or may give at least some explanation on the type of tourist that consumes the "+" and "++" products of tabel 6 more.
For segmenting it is relevant to concentrate on the personal data, i.e. age, education and employment. To have a better view on the family life cycle may be another important source, but no information on that is yet available.
Concerning used accommodation and transport, organisation of the trip, length of stay and spending it has to be realized that these are aspects that are more or less automatically the result of the decision to come and for that the segementing is necessary. In the annex the figures are presented only for reference to the model.

IV.2.1 Age

In the following table all the found available figures on age are presented though for some countries they are a bit unconclusive.
Table 7

AGE	G	UK	I	F	B/H	DK	S	A	CZ	SL	f.USSR	USA
< 24	7	11	8	12	7	7	7	7	16	16	10	
25-34	21	25	43	29		25	25	30	28	28	37	43
35-44	37	35	31	26		41	41	13	13	13	12	35
45-54	23	19	14	14		21	21	13	13	13	12	17
55-64	7	7	0			4	4	7	4	4	2	
>/ 65	3	2	4	16	2	2	2	3	1	1	0	

From the horizontal comparison it can be learned that tourists from the Czech republic, Slovakia, the former USSR, Italy and the USA are relatively young. Tourists from Germany, the United Kingdom and Scandinavia are relatively older, just as from The Netherlands (see The Dutch Holliday Market for Poland). Tourists from France and Austria are in a "middle position"

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*) An analysis of the border survey according to the five products per country of origin can do so. Than however it is necessary to have per segment a net sample big enough. As the median per productsegment varies from 10% to 25% and it is accepted that at least ± 60 net respondents should form the basis for making a consumerprofile (given the division in e.g. age), per country of origin ± 600 persons should be questioned in a quota sample approach. Less is possible but the quality for fine-tuning will be less reliable. In addition it is important that the sampling is done correctly and for tourism marketing that the right period is dealt with. As the big majority of tourists will arrive in summer, the survey should be held between mid June and mid September, omitting VFR, daytrips and business travel.

IV.2.2 Education

Table 8

EDUCATION	G	UK	I	F	B/H	DK	S	A	CZ	SL	f.USSR	USA
High	37	59	75	54	54	55	55		16	19	41	44
Secondary	54	32	23	36		38	38		66	66	51	28
Primary	7	3	2	6		5	5		11	11	4	28
No answer	3	7				2			4	4	4	

Tourists with a higher level of education come in particular from Italy, the United Kingdom, France, Belgium, The Netherlands and Sweden and Denmark. The less educated tourists come from the USA, the Czech republic and Slovakia. Tourists from Germany and the former USSR have an average level of education.

IV.2.3 Employment

Table 9

EMPLOYMNT	G	UK	I	F	B/H	DK	S	A	CZ	SL	f.USSR	USA
Employed	77	78	47			11	77		79	79	80	
Student	8	18	53			81	11		18	18	9	
Other	16	3				8	12		4	4	1	

Tourists from Italy and Denmark are for more than half students. The percentage of "employed" does not vary much for all other countries. The group "other" will mainly consist of unemployed and retired persons. More than average persons belonging to this group can be found amongst tourists from Germany, Sweden and former USSR.

IV.3 The global overview

Though may be a bit inconclusive an overview can be made.

Table 10

	G	UK	I	F	B/H	DK	S	A	CZ	SL	f.USSR	USA
Age												
- younger			X						X	X	X	X
- middle				X				X				
- older	X	X			X	X	X					
Education												
- higher		X	X	X	X	X	X					
- average	X										X	
- lower									X	X		X
Employment												
- employed	X	X					X		X	X	X	X
- student			X			X						
- other	X						X				X	

V Market segments

When the products and the information on global demand are combined, the following segments can be composed:

Table 11

COUNTRY	Productpriority	Touristprofile		
		Age	Education	Employment
Germany	1. Mountains Lakes 2. Coast	Older	Average	Employed Other
United Kingdom	1. Cities	Older	Higher	Employed
Italy	1. Mountains Lakes	Younger	Higher	Students
France	1. Mountains Touring 2. Cities	Middle	Higher	
Belgium/Holland	1. Cities Touring 2. Coast	Older	Higher	
Denmark	1. Coast 2. Lakes Touring	Older	Higher	Students
Sweden	1. Coast 2. Lakes Touring	Older	Higher	Employed Other
Austria	1. Cities	Middle		
USA	1. Lakes	Younger	Lower	Employed
Czech. rep.	1. Mountains Lakes	Younger	Lower	Employed
Slovakia	1. Mountains Lakes	Younger	Lower	Employed
form. USSR	non specified	Younger	Lower	Employed

Though in the introduction the relevance to concentrate was underlined, in some countries special segments can be identified. In this one can think of potential tourists with a Polish origin, "religious tourists" visiting Czestochowa and Jewish tourists to visit Auschwitz.

Finally it has to be mentioned that the above has to be regarded as a model for thinking on marketing Poland as a tourist destination. It is a "tool" that should not be considered as unchangeable or as the only truth. For that the existing data are not yet of enough qualitative standards and not yet of enough precision.
What however is more important is, that the needs of tourists tend to change rather quickly. For that a flexible use of possible methods in marketing is necessary and that cannot continuously refer to once defined segments only.

Annex

Table A Organisation of trip (%)

	G	UK	I	F	B/H	DK	S	A	CZ	SL	f.USSR	USA
Package tr.	12	3	37	23	21	4	4	3	24	24	24	17
Individual via agency	5	14	43	6	11	13	13	7			12	27
Individual	79	81	21	56	68	83	83	60	76	76	59	56
Other	3	2		15				3			5	

Table B Accommodation used (%)

	G	UK	I	F	B/H	DK	S	A	CZ	SL	f.USSR	USA
Hotel/motel	40	55	71	56		36	36	49	11	6	21	58
Campings	5	3	8	1		5	5	1	8	1	57	3
Ren.rms/B&B	13	8	2	21		14	14	17	23	3	10	5
VFR	22	12	10	11		31	31	21	20	10	3	22
Other	20	22	9	2		14	14	12	38	80		12

Table C Transport used (%)

	G	UK	I	F	B/H	DK	S	A	CZ	SL	f.USSR	USA
Plane	6	45	59	56	36	26	26	28	0	0	0	
Car	57	33	22	32	33	26	26	39	64	64	39	
Coach	14	6	0	35	21	1	1		28	28	12	
Other *)	24	16	19	10	10	47	47	33	8	8	49	

*) e.g. boats and trains

Table D Lenght of stay (%)

	G	UK	I	F	B/H	DK	S	A	CZ	SL	f.USSR	USA
1 - 2	38	24	27	16		20	20	24	67	67		13
3 - 4	25	28	27	36		22	22	36	21	21		13
5 -14	34	37	37	41		48	48	33	12	12		40
15 and more	3	11	9	7		10	10	7				34

Table D Expenditure (in (00.000') PLZ

	G	UK	I	F	B/H	DK	S	A	CZ	SL	f.USSR	USA
Per tourist total stay	18	59	80	70		36	58	43	4	4	17	
Per tourist per day	6	7	11	8		7	7	10	3	3	9	

MARKETING AND PROMOTION - WORKING PAPER No 7

THE DUTCH HOLIDAY MARKET FOR POLAND

A global analysis

by

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Warsaw, February 1994

Introduction

In 1992 75,6% of the Dutch population went on holiday for at least one time. In total 10,67 million persons made 26,3 million holidays, which means an average of nearly 2,5 holidays per holidaymaker.
From the 26,3 million holidays 11,4 were spent abroad, i.e. 43%. These holidays were made by 7,16 million Dutchmen (50,7% of the total population), so on average 1,6 holidays abroad were made per maker of a holiday abroad.

Destinations

France, Germany, Austria and Spain are the most favourite countries as destination. About 5% of all the holidays abroad were spent in Poland, the former GDR, former Czechoslovakia, the former USSR, Romania, Bulgaria and Hungary. The last three countries together are having a share of just over a quarter of this 5%. Within the first four the following division can be made:

Poland	11,5%
Former GDR	28,3%
Former Czechoslovakia	54,9%
Former USSR	5,2%

The following figures show the development of Dutch tourism to Poland:
Table 1

Year	holidays	number of days	average length of stay
1990	37.000	392.000	10,7
1991	27.000	290.000	10,7
1992	47.000	432.000	9,1
1993	59.000	727.000	12,3

Source: CVO

PM:

A)
The figure for 1993 is only for the first 9 months, so for the whole year it will probably be a bit higher, presumably about 65.000 with 775.000 nights and and average lenght of stay of 11,9 days.

B)
The figures are based on relatively small net numbers in the sample of the holiday survey. This means that the margin of error is high. For a better analysis of the demand in sub-groups the figures for Poland of 1990 till September 1993 have been counted together.

Structure of demand

In order to getter a better view on the structure of Dutch holidaymakers in Poland three types of classification can be used: age, family life cycle and social class. It is relevant to compare this information to the national data. In table 2 the age-structure is given.

Table 2

Age	Total popul.	Holidays abroad	Holidays in Poland	Average lenght of stay Abroad	in Poland
< 5	7,5	3,8	2,9	13,6	15,0
6-14	10,6	7,2	2,4	14,6	17,8
15-18	5,1	5,7	8,2	12,5	10,5
19-24	9,9	11,8	7,1	11,3	9,4
25-29	8,5	9,5	9,4	11,6	10,8
30-39	16,1	17,2	19,4	11,6	9,6
40-49	14,8	18,8	13,5	12,5	11,8
50-64	15,3	17,9	28,8	12,6	11,2
>/65	12,3	8,3	8,8	12,6	8,1
Total	100%	100%	100%	12,3	10,8

Source: CVO

The data as presented in table 2 show that Poland is significantly more popular for Dutchmen aged between 50 and 64.
It can be assumed that historical knowledge and experience will be a reason for this. However, Poland is not the only country in which this can be seen. The same applies for the former GDR, Czechoslovakia and the USSR.
Compared to them, as competing destinations, Poland receives more younger holidaymakers between 15 and 18, 25 and 29 and in particular between 30 and 39. Poland receives relatively less in the agegroups of 19 to 24, 40 to 49 and over 65.

The above can be illustrated when the family life cycle is analyzed.
Of all the holidays 50% is made of by couples, of which a fifth younger than 35 and four-fifth older than 35 years.
In addition 15% of the holidaymakers is living alone. This does not mean that they travel alone too, as probably they will travel more in package tours.

In principal the most remarkable fact however is that Poland is not yet visited much by families with children. Polish marketing in The Netherlands should look into the possebility to increase their share as they have a much bigger share in holidaymaking abroad than Poland receives today.

Finally it is relevant to mention that the average length of stay in Poland is 1,5 day shorter than for all holidays abroad.

As for social class table 3 informs, where it has to be underlined that social class is the combination of the level of education and the present type of employment.

Table 3

Social Class	Total popul.	Holidays abroad	Holidays in Poland	Average lenght of stay Abroad	in Poland
A(high)	13,8	21,4	16,5	12,7	11,5
B+	25,6	31,5	31,8	12,6	10,4
B-	20,1	19,8	21,8	12,5	11,2
C	33,0	24,1	30,0	11,6	10,6
D(low)	4,7	2,6		12,8	
n.a.	2,8	0,5		10,9	
Total	100%	100%	100%	12,3	10,8

Source: CVO

Table 3 shows that the higher the social class, understandably, the more holidaymaking abroad.
On average however, Poland is visited more by people in the lower social classes: clerks, blue collar workers and professionals with a medium or lower than medium education. This is remarkable when the division for Poland is compared with the other three countries as mentioned before. Combining A and B+ 48% of the holidaymakers in Poland belong to this group. For the former GDR, Czechoslovakia and the USSR the respective percentages are 57, 58 and 88. They "are" clearly above the national average of 53 and Poland is clearly under. This conclusion has to be kept in mind for marketing the country in The Netherlands.

<u>Holiday behaviour</u>

In the paragraph above the personal data on holidaymakers were looked at. Now the actual holidaymaking is presented: used accommodation, transport, trip-organisation and group composition.

Table 4

Accommodation used	Holidays in Poland	Holidays in former GDR, USSR, Czechosl.
Hotel etc.	51,2	52,0
Bungalow etc.	4,7	6,0
Caravan	0,0	9,1
Tent	11,2	9,1
Camper	1,8	1,5
Youthhostel etc	3,5	2,0
Other	27,6	10,2
Total	100%	100%

It is interesting to see that holidaymaking with a caravan in Poland hardly exists, though the Dutch use a caravan for their holidays abroad probably more than any other European nation.
The use of a caravan in 9% of the holidays in the other three countries creates at least the question why such Dutch holidaymakers in Poland can hardly be found. The reason for this should be looked at for future marketing.
In addition the group "other" is unexplainable high. (VFR is excluded in the survey)

Table 5

Way of transport	Holidays in Poland	Holidays in former GDR, USSR, Czechosl.
Private car	50,6	46,9
Train	6,5	6,3
Coach	43,5	38,9
Plane	0,0	6,0
Other	0,0	4,8
Total	100%	100%

Private cars and coaches form the main methods for transport going to Poland. They are more used as way of transport than in the competing other three countries. The use of a plane is explained nearly completely in the holidaymaking to the former USSR.

Table 6

Trip organization	Holidays in Poland	Holidays in former GDR, USSR, Czechosl.
Organized package trip	28,8	41,0
Own transport/acc.in advance reserved*)	2,4	11,4
Own transport/nothing reserved in advance	30,6	23,2
Other	38,2	24,2
Total	100%	100%

*) via an organisation, e.g. a travel agent

Compared with the other destinations the share of fully organized package holidays in Poland is lower. The same is the case in the comparison of holidays where the accommodation is reserved in advance and the holidaymaker organizes his own transport. Complete individual holidays, where nothing has been aranged in advance, are held more than averagely in Poland.
As for the group "other" it shoul be mentioned that this includes holidays with own transport and accommodation reserved in advance personally, so not via an intermediate supplier. This type has a share of 20% of the total.

Table 7

Group composition	Holidays in Poland	Holidays in former GDR, USSR, Czechosl.
1	5,9	6,6
2	42,9	43,4
3	9,4	5,6
4	9,4	22,6
5	6,5	4,8
6	2,4	3,8
7,8,9	0,0	2,2
10 and +	23,5	10,1
n.a.	0,0	0,6
Total	100%	100%

Table 7 shows that in Poland travelling parties of four persons (the "average family") are significally underrepresented. This is in line with what was found on the family life cycle. It is remarkable that parties with 10 or more persons have a very high share in Polish holidays. In principle this cannot be explained by the share of package tours. In questioning the Dutch on the number of members of the group, the number of persons is asked for the direct related friends and/or relatives, so not the total number of travellers in a package.
It can be assumed that comparatively many holidaymakers in Poland come in self organized trips by clubs, e.g. youthclubs or hobbyclubs. For marketing Poland in The Netherlands this is relevant to realize.

Concluding remarks

There is remarkable increase in holidaymaking in Poland by the Dutch over the last four years. In particular people between 50 and 64 visit the country. In general Poland is more popular by holidaymakers in the lower social classes.
The Dutch who take a Polish holiday can be found in particular in two person households, and given their age, in what is sometimes called the "empty nest phase". Poland is underrepresented in holidays by families with children.
The use of a caravan for holidays in Poland is unexplainable low, while the use of "other accommodations" is very high.
Fully organized package trips for holidays in Poland are clearly below average. More than half of all holidays are privately organized. To this group belongs a relatively high number of self organized grouptours.
Compared with "competing" countries, as former Czechoslovakia and the former GDR, holidaymaking by the Dutch in Poland shows significant differences. This is relevant for future marketing, as it gives Poland a chanche to create a clearly recognizable position by its own.