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PHARE PROGRAMME

TOURISM DEVELOPMENT IN POLAND

ROZWÓJ TURYSTYKI W POLSCE

DRAFT
MARKETING STRATEGIC PLAN FOR POLAND
1995-1999

WORKING PAPER

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PHARE PROGRAMME TOURISM DEVELOPMENT IN POLAND

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FOR POLAND
1995-1999

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Warsaw, August 1994

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MARKETING PLAN 1995 - 1999

1. INTRODUCTION

Over the last ten years, tourism has been one of the fastest growing industries in the world. According to the World Tourism Organisation (WTO) international arrivals grew from 284 million in 1983 to almost 500 million in 1993. Receipts expressed in US Dollars have grown internationally by 230% over the same period.

Just as in many other countries tourism is recognised as a growth industry in Poland by the Government.

The objective is to increase the level of economic activity in Poland, through increasing demand within the tourism sector.

This means that the goals in SSTA-policy are to:

* Create additional employment
* Attract foreign earnings and thus contribute to the Balance of Payments
* Increase the level of value added and thus contribute to a higher level of Gross Domestic Product (GDP)
* Generate increased exchequer-revenue through the tourist expenditure
* Contribute to an improved regional distribution of income.

The ultimate measure of performance is the foreign exchange revenue earned from tourism, since it is from such export earnings that the bulk of economic benefits accrue.

To meet the goals is an ambitious task. A lot of work in various areas will be necessary as today the Polish tourist-product is not yet at the required level to compete on the international market successfully. For that many actions are planned or already operational. At the same time however it is extremely important to start with a well balanced strategy to market Poland abroad. That is the basic reason for the drafting of this Strategic Marketing Plan. The Plan is intended as a framework to set out the directions which the SSTA intends to follow in marketing Poland as a tourism destination over the next four years. These directions will be complemented and implemented through yearly marketing operations programmes in co-operation with the Polish tourism industry including the transport and accommodation sectors as well as ground tour operators and other product providers. It is intended that these programmes will be planned annually in early autumn for implementation in the following year.

The roles of the SSTA, the Institute of Tourism and PAPT will have to be clearly defined as well as the reporting system and responsibility of the NTICs.

The Institute of Tourism is the entity to undertake research and data bank activities.

It has to be emphasized that the contents of this plan are limited to promote Poland internationally because of its relevance for the Polish economy.

It does, of course, not mean - also because of its economic impact - that domestic tourism is irrelevant and that SSTA would neglect the national market. A special document on that will have to be prepared as the stimulation of domestic tourism is of a different kind and needs a different policy.

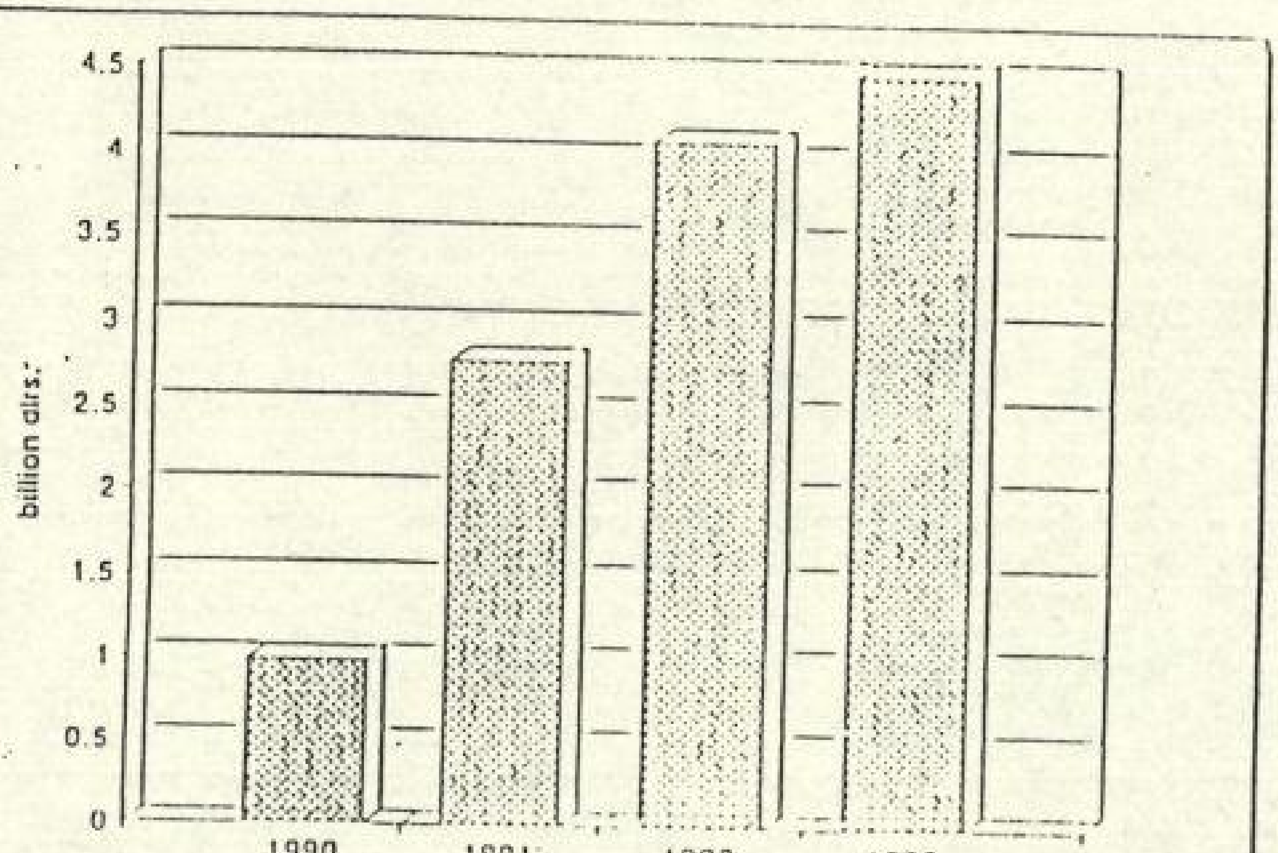
The last three years are best for considering todays situation.

The total number of foreign arrivals and nights has increased by respectively 27% and 19%. "Other accommodations" -especially more favoured by individual travelling tourists- have shown a higher increase of demand than the growth of arrivals and nights in hotels. This results in a growing share -and importance- in tourism to Poland.

In the figures on hotels it should be realized that these also contain business-travellers. Business-travellers and tourists staying in hotels however have a positively higher level of spending, in particular on spending per day. As their stay is in general shorter it does not automatically mean that the total spending also exceeds that of tourists in other accommodations. These tourists in general tend to visit more accommodations during their stay and which influences the average length in nights per arrival. One can conclude that both tourists staying in hotels and e.g. on campsites are relevant for the economic development of Poland as a tourist-destination in future.

For a better view on the economic benefits from tourism for the Polish economy, according to the Institute of Tourism in Warsaw, tourism revenue increased substantially in the years 1989-93. Polands revenue from out of state tourism amounted to just 1 billion US Dollars in 1990, but by 1993 had increased to 4.5 billion US Dollars. Indications are that revenue for 1994 will exceed 5 billion US Dollars (see Figure 1).

Figure 1. Poland's inbound tourism receipts in 1990-93



Source: Institute of Tourism, Warsaw, 1994

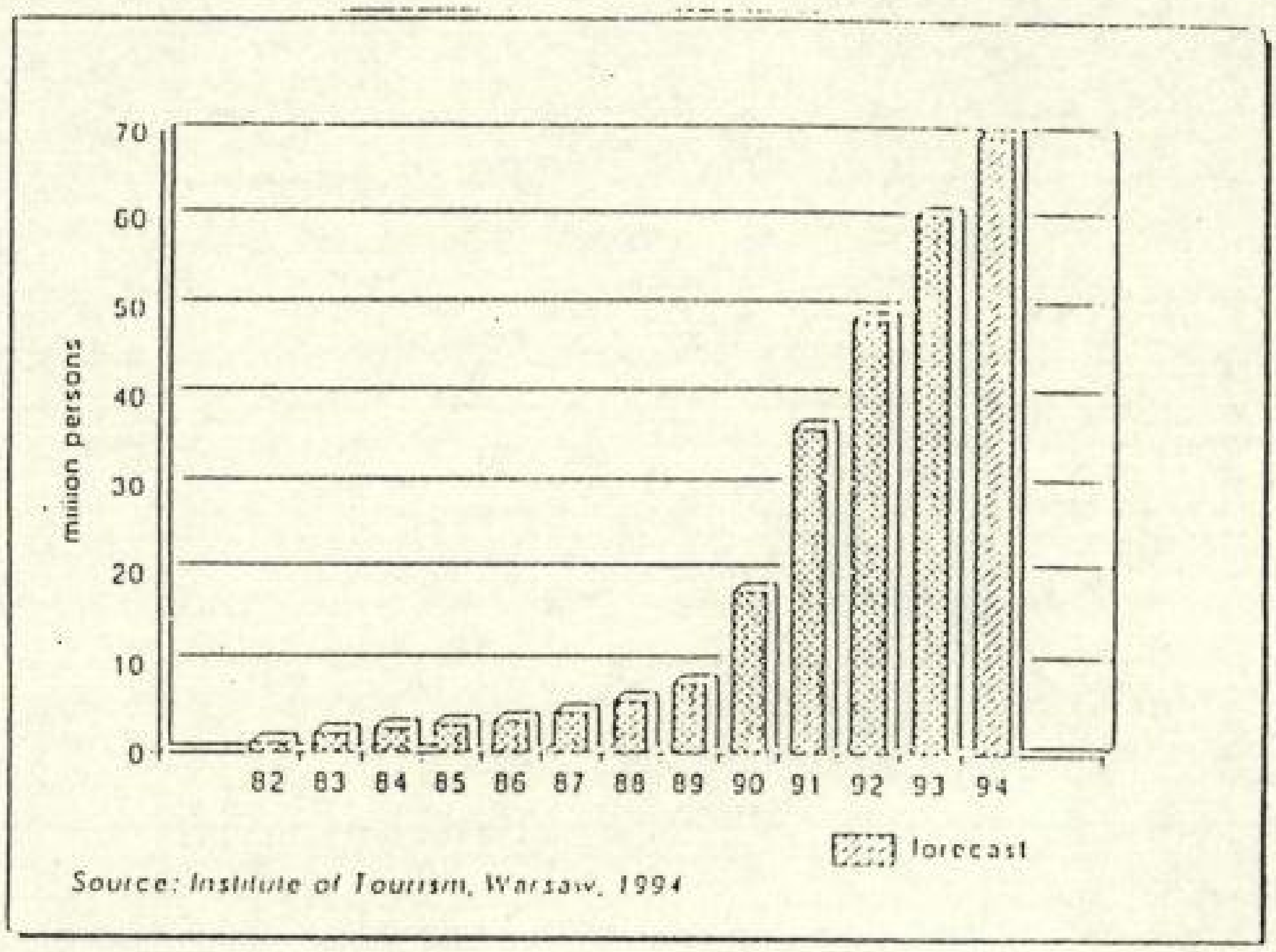
It is now important to look at the countries of origin that make up the figures presented in table 1 and figure 1. For that again the figures of the Institute of Tourism can be used. Since 1991 (see Table 2 and Figure 2) Polish tourism arrivals have grown from 36.8 million to almost 61 million in 1993.

As the figures of GUS and the Institute of Tourism are of a different nature and very difficult to compare (including unexplainable differences), it must be organized that better comparability and consistency will exist within two years.

Table 2. Arrivals in Poland by countries in 1991-93, according to border statistics.

Persons in thousand	1991	1992	1993
Total	36846	49015	60951
Germany	20885	30688	42574
Former Soviet Union	7546	7789	8123
Czech & Slovak Republics	6102	8258	8043
Austria	133	193	232
Holland	159	179	189
Romania	276	209	188
France	197	181	187
Sweden	144	159	177
Hungary	180	187	165
USA	124	130	141
Great Britain	85	146	105
Denmark	142	122	115
Finland	30	33	35
Norway	41	38	38
Belgium	94	94	80

Figure 2. Foreign arrivals in Poland in 1982-94 (1994 - forecast)



As is the situation in the case of other European countries the majority of foreign visitors to Poland come from neighbouring countries. At present, Poland borders with Germany, Czech and Slovak Republics, the Ukraine, Byelorussia, Lithuania, and the Russian District of Kaliningrad. A great number of nationals from these countries come to Poland as one-day trippers and shoppers.

There were almost 18 million tourists who stayed in Poland for at least one night. The number of one-day trippers totalled nearly 44 million in 1993.

German nationals constitute the largest group of foreign visitors coming to Poland. The majority of them are shoppers who come from across the border areas, as certain consumer goods are cheaper in Poland than in Germany.

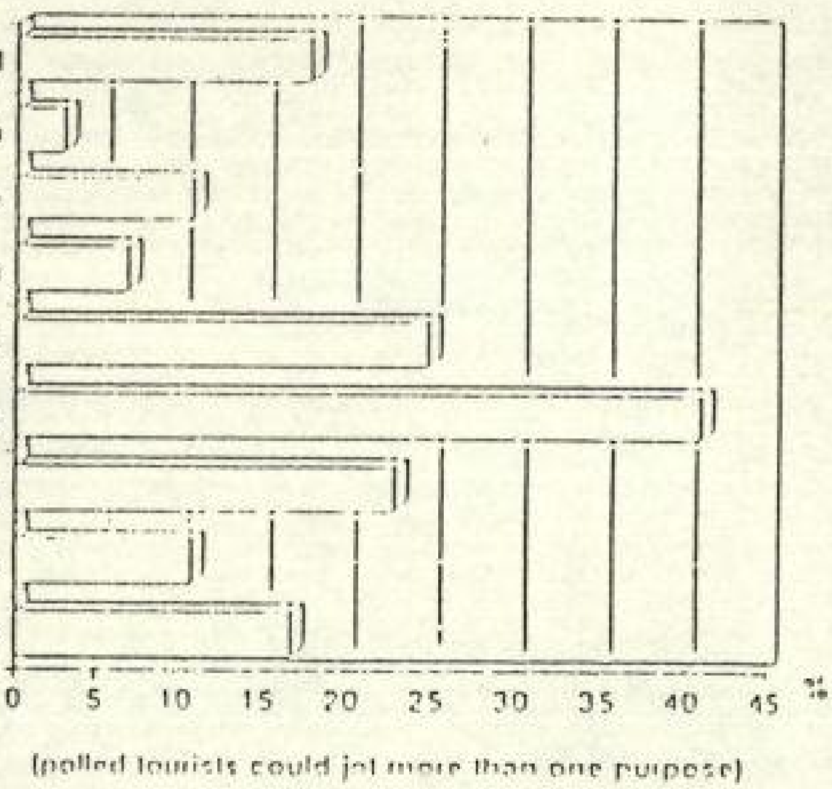
Tourists who arrive in Poland from the eastern provinces of Germany in order to tour this country and relax form another significant group and it is estimated that they spend the largest amount of money.

Shoppers prevailed among the 15 million visitors who came to Poland from the Czech and Slovak Republics and the countries of the former Soviet Union.

Apart from neighbouring countries, Poland has been attracting visitors from Austria, the Benelux, Scandinavia, France, and the USA. The arrivals from these countries and regions amount to 150-250 thousand visitors per year. Apart from Germany, Austria, Holland and Sweden are showing the greatest increase in the number of tourists coming to Poland.

In 1993, the most frequent purposes of trips to Poland were: shopping, visiting friends or relatives, and business. The majority of shoppers come from across the border. The number of people coming on business went up as well. Foreign visitors from Western Europe and the United States of America fairly often quote business and tourism as motivation for their trips to Poland.

Figure 3. Arrivals in Poland by purpose (in %)



Source: Institute of Tourism, Warsaw, 1994

The principal areas in Poland for tourists visitors are:

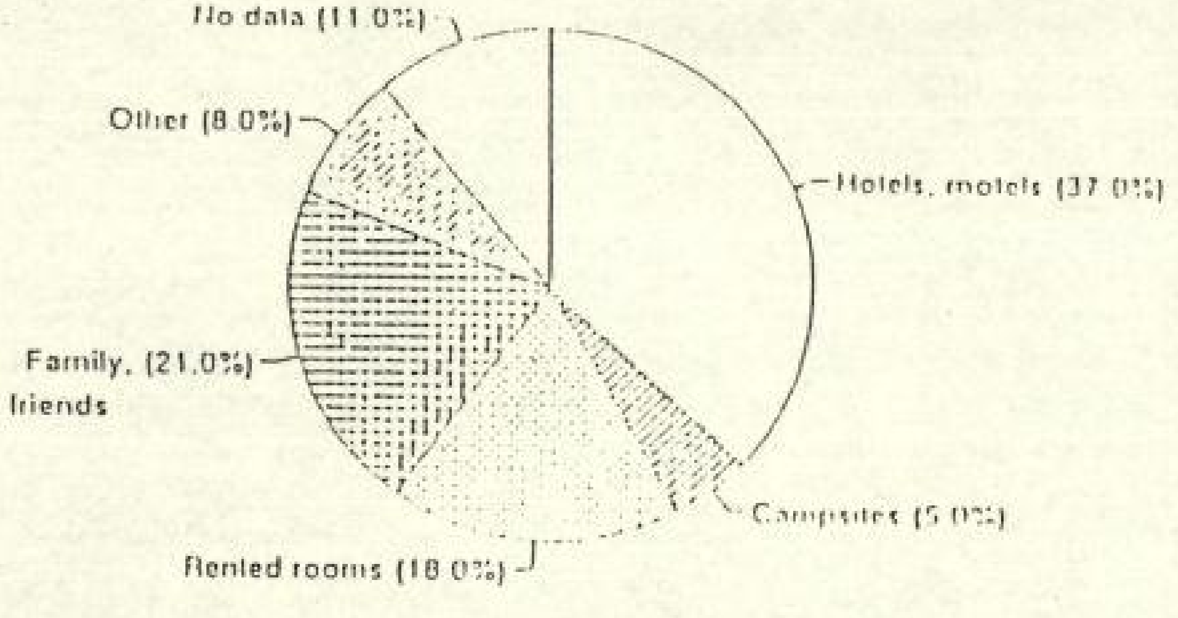
1. The Central Regions 52%
2. The Mountains 18%
3. The Baltic Coast 15%
4. The Silesia 13%

Warsaw and Cracow are the cities most frequently visited. Regions adjoining borders with other countries naturally have large numbers of visitors, mostly shoppers.

The majority of visitors came by cars or trains, some - by tourist coaches, and many by air. Tour operators organised trips for 30% of visitors (17% bought packages to Poland), 19% were invited by Polish nationals, and 13% - by Polish institutions. As many as 36% of foreign visitors to Poland organised trips on an individual basis.

As far as accommodation is concerned, the majority of tourists usually stay in hotels, sometimes with friends or relatives and rented accommodation is also used.

Figure 4. Overnight accommodation used by foreign visitors (in %)



Source: Institute of Tourism, Warsaw, 1994

2. POLAND AS DESTINATION FOR TOURISTS

2.1 Product-supply

Tourists visit a country for what it has to offer. This can be because the country is unknown to them, a new country to explore, or perhaps it is because it has some specific and unique elements which it wants to see. It is also possible that they have visited the country before, liked what the saw and have become repeat visitors.

Poland has four major recognisable products to offer the tourists i.e.:

The Baltic Coast

The Southern Mountains

The Mazurian Lakes

Historical Cities.

Other products such as conferences and conventions can be developed. There is a certain element of the market for Poland which is described as religious.

There are also facilities to practice special interests such as fishing, trekking etc.

Polands main product is based on the historical and cultural interest of its many historic cities and towns. This in fact is the touring holiday and appears to be popular and in general up to an acceptable international standard.

The Baltic Sea area provides facilities for seaside holidays but according to the result of studies undertaken in the area the product needs to be improved and upgraded in terms of facilities and standards. It is considered to be suitable for the domestic market and some segments of the Scandinavian and German markets.

The Mazurian lakes district offers facilities for sailing, fishing and other aquatic sports. There is a shortage of facilities and this area could be sold as a soft adventure area to a selected market which would not be looking for de-luxe facilities.

The Southern Mountains offer facilities for hill walking and trekking. The improvement of accommodation facilities is required. This type of holiday appeals to the outdoor type who enjoys the beauty of the area and is prepared to make do with available facilities.

The Southern Mountains offer facilities for winter sports but facilities are limited and almost totally used by the domestic market.

Over 25% of visitors to Poland are categorised as VFR (visiting friends and relatives) or in other words ethnic tourists. Almost 10% of visitors are described as visiting place of origin also considered nostalgic tourists.

2.2 Shortcomings

The overall tourist product with the exception of touring and city tours needs to be upgraded. There is a need to improve facilities and provide more entertainment.

Folk-lore type shows are usually enjoyed by tourists but they should be presented in a professional manner in terms of production and direction.

A survey carried out by the Institute of Tourism in relation to the summer of 1993 indicates that over 30% of visitors surveyed were critical of sanitary facilities. Almost 20% were critical of the standard of services.

The above two problems need to be rectified as soon as possible, otherwise Polands tourism will suffer badly through unfavourable word of mouth publicity.

Marketing and promotion will have to direct its efforts to the correct market segments and not promote an unacceptable product in markets demanding top standards.

2.3 Access

2.3.1 Air transport

LOT Polish Airlines operate flights from the new state of the art. airport at Warsaw to 25 cities **[please control]** in Europe, including the major capitals.

Presently 10 European airlines **[please control]** operate flights to Warsaw.

LOT also operate flights from Warsaw to intercontinental destinations in Asia and northern America. From the above it would appear that there is presently a satisfactory availability of air transport from our selected main source markets.

In future however this might change by the operation of more flights to Poland and Warsaw in particular by LOT and other carriers.

[please control if no intercontinental carriers come to Warsaw]

2.3.2 Surface transport

There are satisfactory rail connections from the European mainland source markets.

Many tourists from neighbouring countries travel to Poland using their own cars. However to help this type of tourism Poland needs to improve the standard of its roads and the availability of roadside restaurants and cafes.

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 high-ways. 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 1), 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.

2.3.3 Sea transport

Shipping companies operate regular ferry services between Scandinavian countries and Poland. Services are increased during the summer season.

Based on volume sea transport will probably never take an important place in inbound tourism to Poland. However the direct time saving advantage, the ease during the trip and charm of travelling by boat result in the positive value of this type of transport and thus cannot be neglected.

2.4 SWOT Analysis

Based on international tourism demand in general and to Poland in particular and also based on what Poland has to offer, including what has not yet reached required levels, a summary of the position can be integrated into an analysis of strengths, weaknesses, opportunities and threats (SWOT), presented in figure 5.

Figure 5 SWOT ANALYSIS for POLAND

Strengths

* Varied, interesting landscape & wild nature sanctuaries
* Heritage and cultural assets
* Traditional Polish hospitality
* Good standard of international airport of Warsaw
* Catering service developing fast
* Facilities for active tourism

Weaknesses

* Low-standard accommodation in general
* Shortage of medium-standard accommodation
* Bad road conditions & underdeveloped road network & road services (lack of highways)
* Insufficiency in organisation & design of gateways (especially road & railway)
* Underdeveloped telecommunication system
* Shortage of conference/convention/fair centres
* Insecurity (car robbery)

Opportunities

* Interest in Central and Eastern Europe (new Europe discovery), new tourism destination seeking
* Role of Poland in contemporary history of Eastern Europe (Solidarity-movement & Walesa)
* Convenient geographical location
* Growing tourism by interested senior citizens
* Trend towards active tourism and "less sun"
* More leisure time + more than 1 holiday per year/Poland also as destination for second and third holidays annex to main holidays
* Good (temporary) exchange rate

Threats

* Bad image of Poland - polluted & uninteresting country
* Better image & position of competing countries (Hungary, Czech & Slovak Republics)
* Product-dissatisfaction can cause bad publicity
* Political unrest in Southern Europe (especially important for USA-market)

3 STRATEGY

3.1 Markets

The strategy to be adopted is to promote in markets which appear likely to respond positively to promotional activities.

As has been stated above many of the neighbouring countries provide visitors in the form of one-day shoppers and are unlikely to extend the duration of visits as a result of promotion. In this plan we will concentrate promotional efforts on Western European markets with proven ability through disposable income to take holidays on an annual basis. The USA will also be included as a major source market.

As this stage of development in most of the selected markets promotional activities will be aimed at reaching the consumers through cooperation with the travel trade.

There will be some exceptions to this in markets where large numbers of visitors travel by private car. In these markets promotions will be undertaken with automobile clubs.

As for which markets have priority in marketing Poland abroad, the following criteria are important:

* Number of arrivals to Poland
* Length of stay in Poland
* Expenses per tourist/per trip in USD (in Poland)
* Expenses per tourist/per day in USD (in Poland)
* Existing prospects (size of the market: Outgoing Tourism)
* Polish Tourism Trade Preferences
* Phase of market development
* cost of marketing
* Competitors position

Based on the above the priority source markets have been selected as follows:

(i) EUROPE

a) Germany

b) Sweden and Denmark

c) Belgium and Holland

d) The UK, particularly England

e) France

f) Italy

g) Austria

(ii) NORTH AMERICA

a) The USA

(iii) POLISH ORIGIN - ETHNIC

All the selected markets have a significant number of residents of Polish origin. The following is an indication of the ethnic content of arrivals from the selected European markets in percentages.

Market	Ethnic
Germany	29%
Sweden/Denmark	38%
Belgium/Holland	21%
The UK	19%
France	21%
Italy	18%
Austria	21%

There is very little in terms of marketing that can be due to stimulate growth in ethnic traffic. The NTICs in the various markets should maintain contact with any Polish societies or groupings within their areas. They should make information on tourism developments and promotional air and surface fares available to these organisations.

It is necessary to maintain these contacts because the ethnic groups will also be aware of the attractions of other tourism destinations and the value available.

It might be possible to arrange for groups from the same area to travel together to Poland.

Summarizing the main European markets by volume is presented in table 3

Table 3 EC and EFTA geographic target markets for Poland (source: ETDC, 1991)

Country	Catchment areas	Holidays abroad 1990 (000)	Share (%)
Germany	Whole country	47.870	44.4
Holland	Whole country	12.152	11.3
Great 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	Zurich, Midlands	2.984	2.8
Total		107.882	100*

Note: * Figure does not add up to 100% due to rounding

For a better understanding of the markets above see annex A with descriptions per country. Based on the Polish tourist product and the motives of tourists that visit Poland a global product/market portfolio is instructive.

Figure 6 **PRODUCT/MARKET PORTFOLIO**

Geographic Market / **Type of Product**	D	A	Scandinavia	Benelux	F	I	GB	USA/C
City Break	XX	XX	XX	XX	XX	XX	XX	XX
Touring Holidays	XX		XX	X	XX	X	X	XX
Countryside Holidays	XX					X		
Mountain Holiday	X	XX	XX	X	X			X
Lake & Forest Holidays	X	X	X					
Seaside Holidays	X	X	X	X				
Active Holidays (Sports)				(X)			(X)	
Pilgrimage Tours	X				X	X		X
Special Interest Holidays	X	XX	X	(X)	X	X	X	
Business Tourism:								
*business visits	X	X	X	X	X	XX	XX	X
*fairs.conferences &					X			
exhibitions		X		X	X			X
*other business purposes								

Based on the Surveys of the Institute of Tourism

XX - Very important

X - Important

(X) - Prospective

3.2 Market representation

There are Polish National Tourist Offices in the following European cities: Cologne, Stockholm, Brussels, Amsterdam. New offices will be opened London in November 1994 and after that in Rome and Vienna, followed by Paris. In the USA there are NTIC offices in New York and Chicago.

There are POLORBIS offices in Berlin, Hamburg, Stuttgart, Cologne and London.

There are ORBIS offices in Paris, Rome, Oslo, Stockholm and Malmö. LOT Polish Airlines have offices in all the above cities.

For an adequate marketing-policy it will be necessary to formulate clear arrangements between SSTA, PAPT and NTICs on one side and the ORBIS/POLORBIS offices at the other side. The support of ORBIS/POLORBIS offices in the execution of marketing and information is heartly welcome, but their autonomous and private commercial interests may diverge from the national objectives and consistent approach. For the benefit of both parties this has to be arranged in the coming years.

3.3 Positioning

For marketing in the priority countries chosen via the representations it will be extremely necessary to show a consistent and overall "message". A message that has to be carried in an effective way to communicate what makes it worth while to visit Poland. To get the promotional massage across effectively a Logo and Slogan must be developed to sell the attractions of Poland, which are appealing and historically and culturally unique.

[the discussion how to position Poland in general has to be done by SSTA]

4. PROMOTIONAL POLICY

Many possibilities exist to promote Poland abroad.

Various marketing-instruments can be used, depending on the type of market, the type of tourism and financial limitations.

Basically two areas of promotional activity can be considered:

* trade promotion
* consumer promotion

Under these two areas a mix of instruments is available.

Figure 7 The mix of promotional instruments

Instrument	Trade	Consumer
Fairs	X	X
Educational trips	X	
Advertising	X	X
Information offices	X	X
Public Relations	X	X
Printed materials	X	X
Workshops/Sales missions	X	
Sales calls	X	

4.1 Trade promotion

The tourist trade is in many respects the major partner in marketing Poland.

That means the trade in Poland as well as abroad.

Poland is not well known in most countries and is not considered as a holiday destination by the majority of holiday taking tourists in Western Europe.

One of the reasons for this is that Poland has not spent much money on tourism promotion in comparison with its western competitors.

Big spenders on tourism promotion are also South American and Asian countries and they, particularly the Asian countries, are experiencing large increases in visitor numbers from Europe, America and from the Far East region.

Poland must ensure that in European markets there are tour operators including holiday programmes to Poland in their brochures and that the retail agents are sufficiently informed about the programmes to be able to sell them. This is a task for the representations abroad, based on **sales calls** to the industry.

The best way to persuade tour operators to feature Poland as a holiday destination is to take them to Poland to sample the product. Wholesalers should be carefully selected preferably in cooperation with LOT Polish Airlines.

Wholesalers should be taken to Poland individually as one has to realize that they are competitors and so prefer not to travel in groups. It is also worth bearing in mind that a good wholesaler can generate thousands of visitors and consequently deserves the best treatment. When there are a number of wholesalers putting Polish programmes on the market in any of our priority source markets, familiarisation visits or study tours for retail agents must be organised. The retail agents must be selected in cooperation with the tour wholesalers, who know the best selling retail agents, and LOT. In this case groups of retail agents can travel together.

These educational tours need the cooperation with the Polish private tourism sector.

Representatives of the private sector should be involved as it is in their interest that the marketing bears fruit. The Polish tourism industry is the key factor in successfully marketing the country as a destination and that responsibility must also make it prepared to participate, e.g. in making hotel rooms or (ground)transport available without charge. The budgets of the SSTA are insufficient to pay all the costs.

A committee should be set of by the SSTA to handle the planning and organisation of familiarisation/study tours. This committee should consist of representatives from SSTA, PAPT, the accommodation sector, ground transport (coach touring) companies and LOT. The NTIC managers would deal with the committee in arranging of familiarisation visits.

Another area where the Polish industry should invest in is in participating in **trade fairs.**

Participation at the main international tourism fairs, such as ITB in Berlin, BIT in Milan and the World Travel Market in London, gives Poland the opportunity of presenting its tourism product to a large number of trade representatives and consumers. Participation as a tourism country at a trade fair gives the opportunity for the public and the private sector to work together for their mutual benefit, however participation at trade fairs needs advance planning and follow up. Part of the advance planning for ITB could mean the organisation of sales calls to German tour wholesalers.

It could also include the sending of letters by the SSTA to all members of the travel trade, automobile clubs and other outlets to advise of the Polish tourism participation with names of participating organisations.

All trade contracts should be followed up by letters and where relevant, tourism detailed information sent. Consumer enquiries should also be actioned.

One month after the fair the SSTA should arrange a meeting of all participants to discuss the immediate results of participation and suggest improvements for future participation

Next to trade fairs the Polish tourism industry should if wished have the opportunity to contact the tourist industry during **workshops or sales missions** in Poland or abroad.

The representations abroad should be the organizers of such activities, just as they have the task to inform the trade in their respective countries of what is relevant to know. This can be done via

Public Relations and printed materials e.g. news-letters and trade manuals. They are responsible too as the information office for the trade in their own markets.

In some cases **advertizing** in trade magazines may be possible.

4.2 Consumer promotion

Within this area Poland promotes itself as a tourist destination directly to the foreign tourist and not via the trade.

The first that comes to mind then is **advertizing.**

It covers consumer advertising in newspapers, magazines, TV, radio, etc. and travel trade advertising in travel magazines.

Consumer advertising however is very expensive and should not be undertaken until Holiday Programmes to Poland are on sale to the public, through the wholesale and retail travel trade. When special interest holidays, such as fishing, trekking, boating etc., are available, magazines aimed at the special interest group should be used.

When holiday programmes to Poland are available in source markets consideration should be given to tie/in advertising with LOT and the wholesalers and possibly representative product producers in Poland. An industry group comprising public and private sectors should be formed to look into the possibilities of cooperative advertising thus spreading the advertising coverage.

The above however does not mean that consumer advertising should in the future always be related to programmes of wholesalers.

In those countries where a recognizable demand exists of tourists travelling independently it will become necessary to use consumer advertising. Given the present financial limitations this is yet at minimum.

Given the high costs of advertizing **Public Relations** is an excellent possibility as an alternative to consumer promotion.

The provision of news letters not only for the travel trade but for travel journalists is an important aspect of the public relations activities of any national tourism organisation.

The managers of NTICs should try to establish contact with the most important travel writers and keep them informed on interesting tourism developments in Poland.

Top writers should be invited, as individuals, to visit Poland. TV and radio journalists should also be invited. Journalists should be handled as individuals and given top treatment.

The editorial publicity, which can result from journalists visits is very valuable, perhaps more valuable than advertising because it is not perceived as being paid for.

One of the best ways to promote special interest holidays, such as fishing, trekking, horse riding, sailing etc. is to invite journalists from the respective special interest magazines to visit Poland, sample the Product and write about it.

It is not always easy to get good journalists to visit any country but when they express interest in visiting Poland, decisions should be made quickly about the visit because good journalists are in demand and they usually have deadlines to meet with articles. When decisions are not taken quickly these journalists may visit other countries instead of Poland.

A position of Public Relations Officer should be created either in the SSTA or PAPT to handle all aspects of PR and journalists visits.

The Public Relations Officer should set up a committee to handle and coordinate journalists visits. This committee should include a representative of LOT and private sector representatives, particularly from the accommodation and transport sector.

The representations abroad are in direct contact with the consumer in answering their questions by mail, phone or person at the **information-office** or at **fairs**, and this has a very important PR content.

Given the small numbers of staff attending fairs is limited to participation in the most important fairs, probably fairs that are also organized as trade fairs. The participation in regional fairs is not very effective because of lower numbers of visitors and a low share of potential tourists to Poland. The present type of tourist that is interested in a holiday in Poland is for the most part able to find information from the representations directly.

The information provided to him is mostly in **printed materials**.

Brochures, maps, information leaflets are indispensable to tourism promotion. An "Image Brochure" giving full information on the Polish tourism attractions is essential for all markets and if well produced can be used by the trade as well as the consumer. Special interest brochures for example, fishing and horse riding are necessary as sales aids.

The cost to print the relevant publications is high, so it will be necessary to invite the private industry to advertise in the publications in an appropriate way, covering a part of the money needed. Another possibility that will be introduced is the asking for a small amount of money from consumers who apply for information. This can partially compensate for the costs of distribution by mail. This method is used by many offices abroad of other national tourist organisation.

4.3 Congresses/conventions

Within the area of promotional policy congresses/conventions have to be mentioned as a special field for action.

The development of congress and convention business can be very lucrative but needs a degree of specialisation. A senior sales/promotional representative should be appointed initially to begin promoting in this area. There is usually a long lead time for conventions and congresses. It is not unusual to have decisions as to congress location made up to four years in advance. Specialised fairs like the European Convention and Incentive one in Geneva should be attended. However before promotions start, an inventory of facilities and accommodation banks should be made.

The best promoters of international conventions should be the Polish delegates. It would be part of specialised staffs work to make a list of Polish delegates attending international conventions and obtain their assistance in bidding for the convention for Poland.

To seriously promote conferences and conventions a very good quality brochure is essential.

4.4 Market research

Market research is an essential tool for the promotional policy.

Basically three areas of research are to be distinguished.

The first is to have adequate knowledge of outbound tourism per country where Poland promotes itself. This information is available in holiday-surveys.

This surveys however only give the global picture on outbound travel, volumes and trends, but as the share of Poland is very small, they cannot inform on the specific structure of demand for Poland. 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. Figures by GUS as e.g. used in table 1 are a good source when they will be better adapted to marketing-needs. This means that the country of origin and the motive for travelling have to be included in the registrational system. GUS will do so from 1994 on.
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.
The second area is that of measuring the effectiveness and evaluation.
The main reasons for doing research in this area are to find out if the promotional activities are successful and if not how to change them.
The third area of research is more basically for marketing policy in future. One can think of research on aspects as classification, seasonality, environment, voice-response systems etc.

5. ORGANISATION AND FINANCES

5.1 Organisation

In the introduction it has already been mentioned that the role of the various parties that deal with Polish tourism should be defined. In chapter 3 the offices of Orbis and Polorbis and of LOT were mentioned in relation to the NTIC's.
In order to facilitate procedures and create an effective marketing of Poland internationally it is time to restructure the present situation. Based on the system of well established national tourist organisations (NTO's) in other European countries Poland will follow this example. This means the creation of one body that is responsible for the planning and execution of all the aspects that deal with marketing/promotion.
In fact it means that PAPT will be enlarged by the replacing of all the present relevant tasks that are done by SSTA. The NTIC's should be responsible to PAPT. PAPT will thus become the Polish National Tourist Board, responsible for marketing Poland abroad as a tourist destination.
In this model PAPT will organize the relevant relationships with LOT, ORBIS and POLORBIS, the regional tourist organizations and the private industry as PAPT has the know how on what to do, when and why, based on practical experience.

SSTA's responsibility will in this area be limited to

(A) control PAPT on the quality of its executional task.

(B) the harmonization of PAPT's activities with the Polish tourism policy in general

(C) the control of financial aspects, as the PAPT-budget will be made available from SSTA's budget.

SSTA will continue until further notice to be responsible for domestic marketing and for all the other tasks presently done, including research by the Institute of Tourism.

5.2 Finances

The new PAPT-organisation will be responsible for the correct use of the budgets made available by SSTA. SSTA will provide a system in which the annual budgets are based on a medium term policy as the work by PAPT and the planning and execution of its work demands for a solid foundation in the years to come.

As for PAPT's budget it is to be expected that the private industry in Poland cannot yet participate on a big scale. A financial medium term plan has be made by PAPT for SSTA-funding but including a strategy by which PAPT will increase financial support from the industry. In 1999 at least 20% of its budget should be provided by others than SSTA. The amount of money that comes from the industry is dedicated to marketing-activities.
The increase of the marketing budget of PAPT will not result in a decrease of SSTA-funding.

Given the present situation at level zero it can be expected that overhead costs (salaries, housing, travel etc.) take a major share of PAPT's budget. **[SSTA should provide figures on the present situation for financial targeting for 1999 as soon as possible]**
When presently ... (65%?) is needed for overhead-costs, this share should drop
to .... (50%?) in 1999
Both targets (the increase in funding by the industry and the shift in the budget in favour of marketing) will in 1999 result in an increase of the factual marketing out of pocket expenses by approximately 75% compared with 1995.
[PM this chapter must be looked at very closely, including the figures that SSTA will provide hopefully soon]
[As budgets per market are only slowly shifting in % of the total, it might be good to

include the percentile division here is included in the annual plan for 1995, probably in the revised way as corrected in the copy of Mr Jermanowski, under the argumentation that this proves the priority-list on which countries to operate in. However when you do it over here, it can only be for 1995, given the proposal on PAPT, and one has to discuss if the figures are in total or just marketing]

ANNEX A

(i) THE GERMAN MARKET

The arrivals figure shown for Germany in 1993 was 42,574,000. At least 40 million of this number were day trippers who crossed in to Poland for shopping It is unlikely that 2.5 million tourists staying more than one night arrived from Germany. If they did and the percentage for ethnic visitors at 44% is correct, it means that something like 1.4 million tourists arrived. This includes business travellers at 26% of the total or 650,000 so that up to 750,000 of the total could have been holiday takers. This is a very large figure and Germany is obviously the most important market.

The per person and per day expenditures for Germans, at 111 US Dollars and 19 US Dollars respectively are low but accounted for by the high member of day trippers/shoppers.

The majority of German tourists visiting Poland are independent travellers and do not use the services of travel agents.

According to a study undertaken for the SSTA in 1993 by Witold Bartoszewicz most German visitors come to Poland using their own cars (up to 90% in summer 1993).

Coach touring, according to the above study, is losing popularity but is still significant.

According to a study of the German market by Arthur D.Little there are up to 20 agents/tour wholesalers offering programmes from Germany to Poland.

From this it is apparent that agents/tour wholesalers can be influential in directing tourism to Poland. Much of this traffic comes by way of coach tours.

Promotions in Germany must be aimed at the trade and consumer. In view of the high number of car tourists coming from Germany the automobile clubs will be used as promotional outlets and a brochure "Motoring in Poland" will be produced.

(ii) THE SCANDINAVIAN MARKET

For the present the Scandinavian market consists principally of Sweden and Denmark, although the NTIC in Stockholm is also responsible for Norway and Finland. Sweden has shown a steady growth from 1991 eg.:

1991	143,600	
1992	158,800	+ 10.5%
1993	177,300	+ 11.6%

On the other hand Denmark has shown a decline in visitor arrivals over the same period eg.:

1991	141,600	
1992	122,300	- 13.6%
1993	115,300	- 5.7%

It is not known what is the cause of this drop, however as in all markets there is a need to undertake market research in Scandinavia to establish the position of Poland as a tourist destination with good and bad points.

The Sweden and Denmark markets are principally interested in the coastal region of the Baltic but also interested in the lake areas and touring.

The transport used is identical for Sweden and Denmark i.e. 26% air, 26% private car, 1% coach and 47% ferry.

Most visitors from Sweden and Denmark do not use the services of travel agents or tour operators. Some 83% come as individuals and make their own travel arrangements. A high percentage 31% is shown as VFR or ethnic, while 36% use hotel/motel accommodation.

The predominant age group is 35-44 (41%) with 25-34 amounting to 25% and 45-44 - 21%.

In spite of the small number of Swedes and Danes using package tours, efforts should be made to get tour wholesalers interested in promoting Poland. Familiarisation/study tours must be organised for selected tour wholesalers especially to sell city tours and special interest holidays. Promotions in cooperation with operators of ferries and automobile clubs should be considered and a booklet on motoring in Poland produced in Swedish.

Advertising in travel trade papers should be considered.

Visits to Poland should be organised for selected travel writers.

The other two countries included in the Scandinavian area are Norway and Finland. The arrivals from these countries between 1991 and 1993 are as follows:

	1991	**1992**	**1993**
Finland	30,400	33,400	35,400
Norway	40,900	38,100	37,700

As can be seen Finland has grown at a reasonable rate i.e. 9.8% in 1992 and 6% in 1993. Norway has declined in the same period i.e. 6.8% in 1992 and 1% in 1993.

It would not be wise to dilute the Scandinavian budget too much by spreading it right across the four countries. As already mentioned the promotional emphasis should be on Sweden and Denmark but consideration could be given to organising visits for top class wholesalers or journalists.

(iii) THE BELGIUM AND HOLLAND MARKETS

The Holland market and the Dutch speaking part of Belgium are quite similar in holiday taking preferences. The French speaking part of Belgium may vary slightly from the Dutch in likes and dislikes.

The Belgian and Dutch markets grew from 254,000 in 1991 to 273,000 in 1992, an increase of over 7%. The figure dropped to 269,000 in 1993 which was a drop of 1.5%. This drop was mainly from the Belgian market because the Dutch grew steadily during this period e.g.:

1991	159,400	
1992	178,900	+ 12%
1993	189,100	+ 6%

Belgian and Dutch visitors

Touring and visiting cities of cultural interest are the principal activities of the Belgian and Dutch visitors. They have some interest in the Baltic area but this is mainly because of Gdańsk. They have little interest in the mountain and lake areas.

The majority of Belgian and Dutch tourists travel to Poland either in private cars or in coaches. The number using trains is small and travel by air also is insignificant.

A high percentage of Dutch visitors (28%) is in the age group 50-64. This is probably due to historical knowledge and possibly war time experience. Other age groupings are 40-49 (13.5%) and 30-39 (19.4%).

In view of the high number of tourists from Belgium and Holland which brings its own car to Poland, promotions should be undertaken in cooperation with automobile clubs and an information brochure on motoring in Poland should be produced in Dutch and French.

Coach tours to Poland are popular for these countries so efforts should me made to increase the number of coach tour operators offering tours to Poland.

The fact that small numbers of visitors from Belgium and Holland come to Poland by air does not mean that this area should be ignored, on the contrary efforts should be made to interest tour wholesalers to promote tours to Poland using air travel. These may be principally based on city tours and special interest. Familiarisation/study tours should be arranged for tour wholesalers and journalists. Trade fairs should be attended and some trade advertising undertaken. There is a need to undertake market research to establish the perception of Poland as a tourist destination.

(iv) THE UK MARKET

The UK market grew from 85,000 visitors in 1991 to 145,500 in 1992. However the arrivals figure in 1993 dropped by almost 28% to 104,800.

This large drop was due to a prolonged dispute between British Airways and LOT in relation to the Warsaw - London route. This dispute created a situation where there was no air service between London and Warsaw for approximately five months. The problem has been solved for some time now and with regular services again operating regular increases in British arrivals can be expected.

The main interest for British tourists visiting Poland is historical and cultural which involves touring and visiting cities. Small numbers visited lakes (7%) and mountains (14%). The majority of British tourists are in the age group 25-54 (74%).

We have already mentioned that there is a high ethnic content in British tourism to Poland 27%.

The British tourist tends to use travel agents or tour operators more than average when there are language difficulties. It is likely therefore that the travel trade in Britain will be influential in generating traffic to Poland when it is familiarised with the product. It will be necessary to increase the number of tour operators in Britain to promote holidays in Poland. At the present stage of development the accent should be on promoting through the trade by the organisation of study/familiarisation tours, attendance at the World Travel Market and some advertising in travel trade media.

In the public relations area, good travel writers should be invited to visit Poland and given individual treatment.

Market research must be undertaken in the British market to gain more information on attitudes to Poland as a holiday destination.

(v) THE FRENCH MARKET

Arrivals from the French market have been up and down between 1991 and 1993:

1991	196,900	
1992	181,400	- 7.8%
1993	186,500	+ 2.8%

It is expected, that with increased promotional efforts in the market, including the opening of a NTIC, the French market will continue to grow.

French tourists to Poland are mainly interested in touring, cities and mountain holidays. There is virtually no interest in coastal or lake holidays. There is a 38% ethnic content in French tourists arrivals.

Air travel is used by 56% of French visitors, 32% arrive by private cars and 35% arrive by coach.

Package tours are used by 23% of French visitors, 6% use a travel agency to make bookings and 56% come as individuals.

Hotel/motel accommodation is used by 56% of French tourists, rented rooms and B&Bs are used by 21% and 11% are described as VFR.

Figures for expenditure of tourists from different countries by the Institute of Tourism indicate that the French at 7 mln zlotys or 318 USD per stay and 800,000 zlotys or 36 USD per day are the highest spenders next to USA and Italian visitors.

With its capacity to spend and use good class accommodation the French tourist market is worth promoting. Efforts should be made to increase the number of tour wholesalers programmes on offer for Poland and this can be achieved by arranging study tours for wholesalers on an individual basis.

Familiarisation tours for retail agents should be organised in cooperation with LOT and tour wholesalers. The Salon Mondial Trade Fair should be attended in Paris. Journalist visits for selected writers should be organised in cooperation with LOT.

Travel trade advertising should be undertaken with leading travel magazines.

Consideration should be given to tie/in advertising for consumers with LOT and tour wholesalers. The opening of the new NTIC office in Paris will need to be advertised to the public and it also gives the opportunity to hold a press conference.

(vi) THE ITALIAN MARKET

Italian tourist arrivals to Poland like these of France have been up and down between 1991 and 1993 for example:

1991	122,700	
1992	110,600	- 9.8%
1993	123,500	+ 11.6%

It is expected that with increased promotional efforts in the market and the new NTIC office in Rome that the growth pattern will continue at around 10% per annum.

The Italian tourists do not seem to be particularly interested in cities or touring. They are mainly interested in mountains and lakes. The total ethnic content of Italian arrivals is estimated at approximately 28%.

Air travel is used by 59% of Italian visitors and 22% come by private car. Some 19% come by other means, mostly by train.

Package tours are used by 37% and 43% come as individuals but using a travel agency to make bookings and 21% come as individuals making their own arrangements.

The level of expenditure per stay of Italians was 393 US Dollars and the per day was 66 US Dollars. Those figures for Italy really amount to a guesstimate as the sample from which they are drawn was very small. Promotional efforts will be aimed at increasing the number of tour wholesaler programmes to Poland through arranging study tours for retail agents in cooperation with LOT and wholesalers to ensure that Poland as a product can be sold by the travel trade.

Journalists visits should be arranged in cooperation with LOT.

Trade advertising should be undertaken and possibly some consumer advertising in cooperation with LOT and tour wholesalers. As is the case with all markets some research and investigation is needed to give accurate information for future planning.

The BIT Trade Fair in Milan should be attended.

(vii) THE AUSTRIAN MARKET

The figures released for the Austrian market by the Institute of Tourism (IOT) show a very satisfactory growth since 1991 in terms of arrivals i.e.:

1991	133,200	
1992	192,800	+ 44%
1993	231,900	+ 20%

Border surveys carried out by the IOT indicate that the Austrian visitor is interested primarily in touring and visiting cities. There is some interest in mountains but virtually none in the Baltic Coast or the Lakes.

AIR transport is used by 28% of Austrian visitors and 39% come by private car. Some 33% is shown for arrivals by other means this means train or coach.

Accommodation used varies from 49% using hotel/motel, 17% using rental rooms and B&B and 21% are shown as VFR.

Expenditure is estimated at 215 US Dollars per head per stay and 50 US Dollars per head per day. This indicates a high number of short stay visitors.

The growth in arrivals from Austria as already stated has been very satisfactory and the operating of a NTIC in Vienna should help further.

Initially it will be necessary to concentrate activities on promotion through the travel trade. The opening of the office should have some impact on the consumer.

(viii) THE USA MARKET

The US market to Poland grew from 124,000 arrivals in 1991 to 141,000 arrivals in 1993. In percentages the US market in 1992 showed an increase 7% over 1991 while 1993 showed an increase of 14% over 1992.

This is a satisfactory rate of growth considering the very small budget available for promotion. From a revenue point of view the USA visitors were the highest per head spenders US Dollars 942. They were also the highest spenders on a per day basis at 61 US Dollars per day - see Table 6.

Poland is not well known in the USA except in ethnic areas and budget allocated to the market for promotional purposes have been too small to allow any medium to large scale consumer promotions. As a consequence of this the activities of the NTIC's have been directed at the travel trade. Travel trade magazines have been used for advertising and there has been participation in trade shows such as those of ASTA.

Journalists have been sent on visits to Poland and the resulting editorial publicity has been satisfactory. Tour operators have been sent on familiarisation tours.

Where there is a limited budget for promoting a country as yet little known in the market there is a need to organise visits of tour operators and journalists. These visits are usually operated by the NTIC's in co-operation with LOT. There should be more co-operation by the private sector in these operations.

(x) BORDERING COUNTRIES MARKETS

The countries bordering Poland provide valuable revenue from the shopping of day trippers and short stay visitors. Those visitors will continue to come to Poland, as long it is able to give value for money and they will come without the need of much promotion.

CHARACTERISTIC OF TOURISM ARRIVALS TO POLAND IN 1993

Geographic Market / Characteristic	TOTAL	D	f.USSR	C - S	A	Scandinavia	Benelux	F	Other Europe	USA /C
MARKET SIZE (in thousand)	17.000	6.800	7.500	480	232	366	269	187		165
Demographic Characteristic										
AGE:										
> 24	9.1	5.8	**13.2**	6.6	1.7	9.9	4.5	6.2	6.6	3.5
25-34	**32.4**	29.5	**36.9**	26.3	20.9	24.2	32.3	**36.0**	27.9	24.4
35-44	**35.9**	**36.8**	34.0	**44.7**	**50.2**	**38.4**	**36.0**	33.5	**36.2**	24.1
45-54	13.8	**18.4**	7.1	16.9	**20.6**	**17.4**	**21.5**	**21.5**	**21.6**	**29.7**
55-64	3.8	5.6	1.6	3.3	6.7	5.7	3.7	1.3	6.2	**11.3**
65 –	0.5	0.8	0.0	0.5	0.0	2.1	0.4	0.0	0.4	3.6
EDUCATION:										
higher	38.0	31.8	41.8	19.6	**55.5**	40.8	47.3	**46.8**	**49.4**	**63.2**
middle	**51.8**	**54.3**	**52.2**	**56.9**	38.1	**49.1**	**50.1**	32.6	41.2	27.7
basic	6.5	**10.9**	1.6	**18.5**	6.4	7.6	1.8	**10.5**	5.0	3.1
EMPLOYMENT:										
employed	**76.9**	**81.6**	70.1	**84.4**	**87.6**	77.6	**83.4**	**82.9**	**84.7**	79.4
students	8.7	7.9	9.0	7.3	2.2	10.2	10.1	**19.0**	11.2	7.8
ORIGIN:										
Polish origin	13.8	13.6	13.0	7.2	**18.4**	**17.2**	10.8	**28.2**	13.6	**43.9**
Tourism Behaviour										
LENGTH OF STAY :										
average in days	*4.7*	*4.7*	*4.3*	*4.2*	*3.0*	*6.8*	*5.7*	*6.4*	*5.5*	*17.0*
1-2 nights	31.5	32.8	28.5	**49.2**	**50.6**	24.3	**38.6**	15.3	**36.0**	19.7
3-4 nights	**36.3**	29.4	**47.4**	21.6	40.1	27.8	16.1	26.7	24.3	9.8
5-14 nights	29.2	**36.0**	21.3	27.8	9.0	**39.1**	37.0	**49.5**	34.5	34.3
14–	3.1	1.9	2.7	1.4	0.3	8.9	8.3	8.5	5.2	**36.2**

Geographic Market / Characteristic	TOTAL	D	f.USSR	C - S	A	Scandinavia	Benelux	F	Other Europe	USA /C
TRIP ORGANISATION:										
-package tour	18.5	2.9	**35.6**	10.1	**29.4**	10.7	5.4	1.0	3.3	1.1
-individually via travel agent	13.0	2.0	**24.1**	2.6	1.4	14.3	15.9	10.3	**21.6**	**26.0**
-private invitation	18.7	23.2	16.6	13.7	1.8	11.2	13.9	22.6	16.8	**25.2**
-invitation by Polish institution	13.7	22.6	4.2	12.8	7.9	13.6	14.1	**27.9**	**22.6**	8.3
-independent	**34.5**	47.8	17.4	**59.5**	**58.2**	**49.2**	**50.7**	**35.5**	34.4	**36.8**
TRANSPORT:										
plane	4.6	1.1	1.2	0.2	13.3	12.4	**18.1**	**23.4**	**35.8**	**74.8**
car	**58.0**	**88.5**	**31.1**	**86.2**	**66.8**	**33.4**	**66.0**	**74.6**	**41.7**	6.4
truck	2.3	1.9	0.5	3.8	**19.9**	8.7	10.1	2.0	11.5	2.6
train	**22.7**	2.3	**51.6**	0.0	0.0	0.1	0.0	0.0	4.1	0.0
ferry	1.7	0.2	0.3	0.0	0.0	**38.5**	0.0	0.0	0.0	8.4
bus/coach	8.9	2.0	**15.3**	7.5	0.0	7.0	5.7	0.0	6.4	0.0
ACCOMMODATION:										
hotel/motel	**38.0**	**32.1**	**39.2**	19.6	**38.5**	**51.5**	**51.4**	**65.2**	**61.7**	**38.9**
camping	5.5	5.6	5.4	9.6	**12.9**	2.5	7.4	4.3	4.6	0.0
private accommodation	18.2	**20.9**	16.5	**23.9**	**35.1**	16.7	11.1	6.1	11.5	11.9
friends.relatives	**20.8**	23.7	19.9	**24.4**	10.2	13.0	16.9	12.8	10.7	**32.2**
VISIT IN POLAND										
1	11.0	5.7	10.3	9.5	9.3	**28.4**	**24.8**	15.3	**32.4**	**36.3**
2	14.0	11.0	14.8	19.6	20.2	19.7	22.7	**40.2**	15.6	18.5
3	15.0	13.1	15.6	**26.6**	**22.5**	21.5	14.9	17.6	16.8	8.0
4+	**56.9**	**68.9**	**54.1**	**42.5**	**47.7**	28.4	**37.6**	**26.0**	33.5	33.5
DECLARE TO COME BACK	**78.3**	**86.4**	69.1	**86.2**	**91.3**	**82.4**	75.1	78.0	**82.7**	**80.0**

Geographic Market / Characteristic	TOTAL	D	f.USSR	C - S	A	Scandinavia	Benelux	F	Other Europe	USA /C
MOTIVATION:										
VFR	**24.6**	**31.8**	**19.2**	19.9	6.0	**19.8**	**20.6**	**30.1**	**22.2**	**39.8**
Visit place of origin	7.7	**12.3**	3.0	6.1	5.8	7.2	3.7	**17.1**	**12.0**	**16.7**
Culture/History	**11.7**	**11.7**	9.7	**15.1**	7.7	**20.0**	**15.8**	**16.4**	**22.7**	**16.6**
Religious	2.7	2.4	3.1	**3.9**	0.0	1.9	1.1	**9.1**	3.2	1.0
Recreation/Entertainment	**18.3**	**18.7**	13.8	**31.8**	**44.4**	**35.4**	**27.3**	**20.8**	17.3	**18.4**
Shopping	**41.0**	**35.7**	**57.7**	**37.2**	1.7	4.1	5.3	9.9	3.7	0.5
Business	**23.4**	**31.0**	15.5	12.5	**23.5**	**18.5**	**21.7**	**43.6**	**36.1**	**27.0**
Fairs.Exhibitions. Conferences	6.4	4.1	**9.4**	3.9	2.6	2.7	3.9	**12.0**	6.4	2.7
other business	4.5	4.1	3.9	3.3	**12.0**	2.6	**16.6**	4.7	**13.8**	5.1
Hobby/Special Interest	2.8	3.9	1.3	**4.5**	**11.4**	**6.0**	1.9	**6.8**	2.9	0.0
OFFER/PRODUCT:										
City Breaks	**54.9**	**52.5**	**58.0**	**57.7**	**36.8**	**40.6**	**37.5**	**56.7**	**51.5**	**64.7**
Mountain Holidays	4.4	**5.3**	1.8	**7.2**	**29.1**	**9.8**	**12.3**	**6.3**	4.4	4.2
Seaside Holidays	1.3	**1.9**	0.2	1.1	**7.1**	**4.8**	**3.6**	**3.1**	0.5	0.0
Lakes/Forest Holidays	2.2	**3.3**	0.9	**6.2**	**5.7**	2.9	1.8	1.0	1.4	0.0
Countryside Holidays	9.5	**15.6**	5.5	**9.5**	1.4	5.0	5.4	3.6	2.0	0.6
Touring Holidays	**11.7**	**12.3**	**11.0**	5.5	3.3	**20.8**	**11.8**	**13.2**	**17.2**	**14.5**
Active Tourism	0.7	**1.1**	0.3	0.8	0.0	0.8	0.0	**1.0**	0.0	0.0
REGIONS VISITED:										
Baltic Coast	14.9	**20.8**	6.6	2.8	2.3	**50.7**	**31.4**	**32.6**	8.6	**22.0**
Lake District	6.0	6.2	5.4	3.9	2.5	**9.1**	**12.0**	**10.9**	4.7	**15.5**
Centre	**52.2**	**38.4**	**65.7**	**31.3**	29.6	**54.7**	**47.0**	**52.4**	**63.2**	**70.5**
Mountain & Upland	**18.5**	**22.2**	10.2	**35.4**	**64.3**	**24.7**	**31.5**	**30.1**	**29.0**	**25.3**
Silesia	12.8	**19.9**	3.6	**35.5**	**21.9**	11.2	**21.9**	**13.4**	**16.9**	**20.8**

Characteristic \ Geographic Market	TOTAL	D	f.USSR	C - S	A	Scandinavia	Benelux	F	Other Europe	USA /C
CITIES VISITED:										
Gdańsk	5.9	6.6	2.4	1.8	4.3	**28.7**	**19.0**	**23.7**	6.3	**14.7**
Szczecin	8.4	**12.0**	4.3	0.8	2.2	**27.9**	7.3	**20.2**	2.8	2.9
Wrocław	6.5	4.9	5.7	**7.4**	**18.7**	**15.5**	**10.9**	**8.1**	6.7	**10.3**
Łódź	3.6	3.5	3.7	3.3	3.4	2.6	3.7	**6.2**	4.4	3.4
Poznań	6.0	5.0	5.9	2.3	5.6	**9.6**	**9.2**	**20.0**	**15.6**	**11.5**
Kraków	**10.3**	7.3	9.7	7.6	**19.8**	**20.7**	**17.3**	**14.0**	**23.6**	**31.1**
Warszawa	**25.7**	**18.3**	**28.5**	8.2	**20.1**	**36.7**	**34.6**	**41.5**	**45.0**	**60.6**
Katowice	7.2	8.2	6.0	**10.7**	3.0	2.6	**15.2**	**10.9**	**12.0**	2.6
Białystok	5.6	0.3	**12.5**	0.7	0.0	1.7	1.9	3.1	0.6	3.1
Lublin	3.6	0.4	**7.3**	0.8	0.3	0.7	3.5	4.1	1.8	1.1
Częstochowa	2.2	1.0	2.1	**3.8**	2.9	**4.7**	2.8	7.0	**10.0**	**13.4**

Source: Institute of Tourism, Warsaw

PRODUCT / MARKET PORTFOLIO

Geographic Market / Type of Product	D	f.USSR	C-S	A	Scandinavia	Benelux	F	I[1]	GB[1]	USA/C	Total
						VOLUME: &		in % in thousand			
MARKET SIZE (in thousand)	40.0 6.800	44.0 7.500	2.8 480	1.4 232	2.2 366	1.6 269	1.1 187	0.7 124	0.6 105	1.0 165	100.0 17.000
City Break	52.5 3.570	58.0 4350	57.7 277	36.8 85	40.6 149	37.5 101	56.7 106	69.0	59.0	64.7 107	54.9 9333
Touring Holidays	12.3 836	11.0 825	5.5 26	3.3 8	20.8 76	11.8 32	13.2 25	8.0	9.0	14.5 24	11.7 1989
Countryside Holidays	15.6 1061	5.5 413	9.5 46	1.4 3	5.0 18	5.4 15	3.6 7	4.0	4.0	0.6 1	9.5 1615
Mountain Holiday	5.3 360	1.8 135	7.2 35	29.1 68	9.8 36	12.3 33	6.3 12	0.0	2.0	4.2 7	4.4 748
Lake & Forest Holidays	3.3 224	0.9 68	6.2 30	5.7 13	2.9 11	1.8 5	1.0 2	0.0	0.0	0.0 0	2.2 374
Seaside Holidays	1.9 129	0.2 15	1.1 5	7.1 16	4.8 18	3.6 10	3.1 6	2.0	0.0	0.0 0	1.3 221
Active Holidays (Sports)	1.1 75	0.3 23	0.8 4	0.0 0	0.8 3	0.0 0	1.0 2	2.0	0.0	0.0 0	0.7 119
Pilgrimage Tours[2]	2.4 163	3.1 233	3.9 19	0.0 0	1.9 7	1.1 3	9.1 17	4.0	0.0	1.0 2	2.7 459
Special Interest[2] Holidays	3.9 265	1.3 98	4.5 22	11.4 26	6.0 23	1.9 5	6.8 13	6.0	5.0	0.0 0	2.8 476
Business Tourism [2]: *business visits	31.0 2108	15.5 1163	12.5 60	23.5 55	18.5 68	21.7 58	43.6 82	52.0	32.0	27.0 45	23.4 3978
*fairs,conferences & exhibitions	4.1 279	9.4 705	3.9 19	2.6 6	2.7 10	3.9 10	12.0 22	4.0	3.0	2.7 4	6.4 1088
*other business purposes	4.1 279	3.9 293	3.3 16	12.0 28	2.6 10	16.6 45	4.7 9	2.0	16.0	5.1 8	4.5 765

Based on the Institute of Tourism Data

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1 Presented % data for Italy and Great Britain in 1992.

2 As there was no such a category specified in the questionnaire under "Way of spending time in Poland", we use data on: "Tourism Motivation", thus figure do not sum up to 100%.

GEOGRAPHICAL TARGET MARKETS FOR POLAND:

Criterium / Target Market	Incoming Tourism to Poland in 1993: Foreign Arrivals ('000) Rank	Tourist Arrivals ('000) Rank	Average Length of stay (nights) Rank	Expenses per tourist per stay (USD) Rank	Expenses per tourist per day(USD) Rank	Outgoing Tourism in (000) Rank	Priority Group	Trade Priority Rank
Germany	42574,0 1	6800,0 1	0.8 14	56 15	41 7	62,400 1	I	
USA	140,8 9	140,8 9	14.5 2	942 1	61 2	53,333 9	I	
Great Britain	104,8 12	104,8 12	7.1 4	470 3	58 3	37,235 12	I	
The Netherlands	189,1 5	189,1 5	7.6 3	242 9	28 12	19,811 5	I	
Belgium	79,7 13	79,7 13	7.1 4	174 12	22 13	Li. 8	III	
Austria	231,9 4	231,9 4	4.3 11	284 7	53 4	Li. 8	I	
Italy	123,5 10	123,5 10	4.9 10	393 4	66 1	17,263 7	I	
f.USSR	8120,9 2	7500 2	3.8 12	160 13	33 9	Li. 8	II	
France	186,5 6	186,5 6	5.7 8	195 11	29 11	18,910 6	II	
Sweden	177,3 7	177,3 7	5.4 9	254 8	40 8	Li 8	II	
Denmark	115,3 11	115,3 11	5.9 7	311 6	45 6	Li. 8	II	
Czech & Slovak Republics	8043,3 3	480,0 3	0.1 15	32 16	29 11	Li. 8	III	
Finland	35,4 15	35,4 15	6.9 5	392 5	50 5	Li. 8	III	
Canada	23,7 16	23,7 16	21.0 1	631 2	29 11	21,902 4	III	
Norway	37,7 14	37,7 14	6.6 6	236 10	31 10	Li. 8	III	
Hungary	164,5 8	164,5 8	3.0 13	68 14	17 14	Li 8	III	

Source: Institute of Tourism, WTO

Li. - less important as tourism generating markets

I. PRIORITY GROUP
USA
GERMANY
GREAT BRITAIN
THE NETHERLANDS
AUSTRIA
ITALY

II. PRIORITY GROUP
USSR
FRANCE
SWEDEN
DENMARK
HUNGARY

III. PRIORITY GROUP
CANADA
FINLAND
CZECH & SLOVAK REPUBLICS
NORWAY
BELGIUM

OTHER MARKETS

JAPANESE TOURISM MARKET FOR POLAND

According to the WTO data Japan generated in 1993 above 4 million arrivals in Europe. Recorded level represented an average rate of growth of over 7% since 1985. Over the last decade, Japan raised the third important spender on travel abroad in the world with international tourism expenditure. Travel abroad among the Japanese population is still the lowest compared to other major generating countries, but the country is currently perceived as important source market for Europe and a such should be taken into account in future marketing plans for Poland. The image of Poland in Japan, which relates to F.Chopin Music should be maintained and properly modified to attract more tourists.

TARGET MARKET CHARACTERISTIC

Geographical Market	Type of Product	Tourism Bahaviour	Demographic Description			
			Age	Education	Employment	Polish origin
Germany	Holidays: City Breaks Countryside Touring + Mountains,Lakes & Active Holidays Special Interest Business Tours	independent travellers; longer stays & short-breaks; travelling by car; hotels & private accommodation; familiar with Poland; often shoppers, VFR & visiting place of origin	middle, older	middle	employed	
f.USSR	Holidays: City Breaks Touring Business-Fairs,Exhibitions & Conferences	package tours: 3-4 nights coming by train, car or bus; hotels (lower standard); familiar with Poland; often shoppers & VFR	younger, middle	middle & higher	employed	
Czech & Slovak Republics	Holidays: City Breaks Country Mountains Lakes + Active Holidays, Pilgrimage/Religious Tours & Special Interest	independent travellers; mainly short-breaks; travelling by car; mainly private & FR accommodation; familiar with Poland; Shoppers + Recreation & Entertainment Oriented	middle	middle & basic	employed	

Geographical Market	Type of Product	Tourism Bahaviour	Demographic Description			
			Age	Education	Employment	Polish origin
Austria	Holidays: City Breaks Mountains Seaside Lakes District Special Interest Business Tours	independent travellers & package tours; short-breaks mainly; coming by car; mainly hotels or private accommodation but also camping; familiar with Poland; Recreation & Entertainment oriented	middle & older	higher	employed	*
Scandinavia	Holidays: City Breaks Touring Mountains + Seaside, Special Interest & Active Holidays Business Tours	independent; longer holidays & short breaks; travelling by ferry and car; hotels; not very familiar with Poland; Recreation & Entertainment Oriented, Culture & Art Oriented & VFR	middle & older	middle & higher	employed + students	*
Benelux	Holidays: City Breaks Touring Mountains + Seaside & Special Interest Business Tours	independent travellers; short breaks & longer stays; coming by car & plane; hotels; not very familiar with Poland; Recreation & Entertainment Oriented, Culture & Art Oriented + VFR	all categories	middle & higher	employed + students	

Geographical Market	Type of Product	Tourism Bahaviour	Demographic Description			
			Age	Education	Employment	Polish origin
France	City Breaks Touring Pilgrimage/Religious Tours + Mountains, Seaside, Active Holidays & Special Interest Business Tours (!)	independent, invitation by Polish Institution; longer holidays (5+); coming by car & plane; hotels; not very familiar with Poland; Mixed Motivation (Recreation & Entertainment Oriented + VFR & Place of Origin)	young & older	higher & basic + middle	employed + students	*
Italy	Mountain Holidays Lakes & Forest Holidays Business Tours	Individually via travel agency & independent; coming by plane & car; hotels; Motivation: Culture & History	young	higher	students	*
Great Britain	City Breaks, + Touring, Countryside Business Tours (!); Fairs, Exhibitions & Conferences)	independent travellers & individually via travel agent + by invitation; coming by car & plane; hotels/motels; Culture & History Oriented + VFR	middle	higher	employed	*

Geographical Market	Type of Product	Tourism Bahaviour	Demographic Description			
			Age	Education	Employment	Polish origin
USA/Canada	Holidays: City Breaks Touring Mountains Business Tours	independent travellers & individually via agent; long holidays (14 +); plane; hotel & FR accommodation; not familiar + familiar with Poland;VFR & Places of Origin + Recreation & Entertainment Oriented	older & middle	higher	employed	*

Based on the Institute of Tourism Data

Priority Group: I

Focus to: North American Incoming Tourism to Poland

Market Development Phase: Growing

Main Segments - Present & New Main Products - Present & New	Ethnic	Golden Age	Hobbyists[1]	Businessmen
CITY BREAKS	X	X		X
TOURING	X	X		X
EVENTS: * Cultural Events	X	X		X
SPECIAL INTEREST: * Climbing * Sailing * Eco-Tours			 X X X	

[1] Special Interest Clubs Members & Special Interest Magazines Subscribers

Main Polish Competitors: Other Europe

Emphasis on:

Long Haul Holidays & Packages: Eastern & Central Europe
Contact with Trade
Partnership in Marketing with Air Lines (LOT)
Leading Role of the NTICs in New York & Chicago

Marketing Mix:

Public Relation:
- Tourism Journalists & Guide Writers Study Trips
- Press Conferences

Printed Materials:
- Production (for identified segments) & Distribution via NTICs & other Representatives

Trade Marketing:
- Fam-Trips & Seminars/Workshops for Tour operators & Travel Agents

Consumer Marketing:
- Tourism Information Flow via NTICs & Other representatives (LOT, ORBIS etc.)
- Mass Media Advertising

Special Events:
- Polish Evenings & Other (Partnership with Polish Representatives Abroad - Embassies & Trade Missions etc.)

Marketing Research:

Market Analysis (IOT)
Market Intelligence (NTICs, LOT & ORBIS OFFICES)
Other Surveys

Priority Group: I

Focus to: German Incoming Tourism to Poland

Market Development Phase: Developed

Main Segments - Present & New Main Products - Present & New	Nostalgic	Golden Age	Young	Ethnic	Hobbyists [1]	Businessmen
CITY BREAKS	X	X	X	X		X
COUNTRYSIDE HOLIDAYS	X	X		X		
TOURING HOLIDAYS	X	X	X	X		X
SPECIAL INTEREST: *Hunting *Angling *Polish Cuisine ACTIVE HOLIDAYS: *Sailing *Canoeing *Cycling			 X X X		 X X X X X	

[1] Special Interest Clubs Members & Special Interest Magazines Subscribers

Main Polish Competitors: Czech & Slovak Republics, Hungary

Emphasis on:

Marketing Poland as Tourism Destination, but also regionally

Emphasis to second and third holiday trip
(as the average German spends his main holidays in Spain and takes city break in Paris)

Attention to independent travellers mainly coming by car (via Automobile Club Association) & individual tourists coming via travel agents (inclusive tours)

Leading Role of the NTIC in Köln

Marketing Mix:

Marketing Campaign (1994-95)

Public Relation:

Study Tours for Journalists (Press & TV) & Guide Authors

Trade Marketing:

Tour operators & Travel Agents Familiarisation Trips & Seminars
Marketing Representatives Network Development by NTIC, LOT & ORBIS
Sales Representatives Network Development by NTIC, LOT & ORBIS
Tourism Fairs (ITB & other)
Trade/Sales Manual Distribution

Customer Marketing:

Tourism Information Flow via NTIC in Köln
Customer Advertising (Press) - Partnership with Polish Tourism Trade

Special Events:

Polish Evenings & Other (Partnership with Polish Representatives Abroad - Embassies, Trade Missions etc.)

Marketing Research:

Border Crossing Survey (IOT)
Monitoring & Market Intelligence (NTIC)
Other (i.e. Image Surveys)

Product Improvement Required:

Road Conditions & Information
Gateways Facilities Development
Convenient Infrastructure for Day-Shoppers
Value for Money
Customer Service Quality

Priority Group: I

Focus to: Great Britain Incoming Tourism to Poland

Market Development Phase: Initial

Main Segments Present & New Main Products - Present & New	Youth (independent & youth package)	Golden Age (package tours)	Ethnic (independent & package)	**Businessmen** (largest) (independent & invitation)	High Educated, Top Class Staff (independent)	Hobbyist[1]
CITY BREAKS:						
* Big Cities & surrounding(Warszawa, Kraków)	X	X	X	X	X	
TOURING:						
* Main Tourist Attractions	X	X	X		X	
COUNTRYSIDE HOLIDAYS			X			
ACTIVE HOLIDAYS:						
* Trekking & Climbing	X					X
* Water Sports	X				X	X
SPECIAL INTEREST:						
* Angling		X			X	X
* Gliding	X				X	X
* Adventure	X				X	X
EVENTS:						
* Cultural & Art Events	X	X	X	X	X	

[1] Special Interest Clubs Members & Special Interest Magazines Subscribers

Main Geographic Segments: London, South East & Midlands

Main Polish Competitors: Czech Republic & Hungary

Emphasis on:

Marketing Poland as Tourism Destination:

Change Bad Image of Poland ("Low Standard of Service & Lack of Attraction")

Open NTIC in London (1994). Leading Role of the NTIC

Marketing Mix:

Marketing Campaign (1994-95)

. Public Relation:

Study Tours for Journalists & Guide Authors

Trade Marketing:

Tour Operator & Travel Agents Familiarisation Trips & Seminars (according to the segmentation)

Tourism Fairs (WTM)

Consumer Marketing:

Good Tourism Information Flow - via NTIC London, POLORBIS TRAVEL LTD London, LOT Office London.

Printed Materials:

Promotional Brochures Publication & Distribution (according to the segmentation)

Marketing Research:

Border Crossing Surveys & Market Analysis (IOT)
Market Intelligence (NTIC)
Other (e.g. on Image Surveys.on Competition)

Product Improvement Required:

Sport Facility Development
Customer Service Quality
Fairs/Business Centres + Special Attractions for Businessmen

Priority Group : I

Focus to: Benelux Incoming Tourism to Poland

Market Development Phase: Initial

Main Segments - Present & New Main Products - Present & New	Younger (independent, students)	Hobbyists [1]	Golden Age	Businessmen	Families [*]
CITY BREAKS	X		X	X	
TOURING	X		X	X	
MOUNTAIN HOLIDAYS					X
*trekking	X				
ACTIVE HOLIDAYS:					
* sailing	X	X			X
* canoeing	X	X			X
* horse riding	X	X			X
* winter sports	X	X			
* cycling	X	X			
SPECIAL INTEREST:					
* Eco-Tours		X			
* Angling		X			
* Gliding		X			

[1] Special Interest Clubs Members & Special Interest Magazines Subscribers
[*] With special regard to Automobile Association Clubs & Caravans Owners

Main Polish Competitors: Hungary, f.USSR, Czech & Slovak Republics are regarded as more attractive by Dutch Population.

Emphasis on:

Longer Holidays & Independent Travellers (Inclusive Tours)
Leading Role of the NTICs in Amsterdam & Brussels

Marketing Mix:

Marketing Campaign (1994-95)
Public Relation:
  Study Tours for Tourism Journalists (Press, TV) & Guide Authors
Trade Marketing:
  Fam-Trips & Seminars/Workshops for Tour Operators & Travel Agents
  Tourism Fairs
Consumer Marketing:
  Tourist Information Flow via NTICs
  Advertising (Press)
Printed Materials:
  Marketing Brochures Design and Distribution via NTICs and Other Polish Tourism Offices Abroad (LOT,ORBIS)
Special Events:
  Polish Evenings/Days & Others (Partnership with Polish Representation Abroad)

Marketing Research:

Border Crossing Survey & Market Analysis (IOT)
Market Intelligence & Monitoring (NTICs)
Other (on Image Surveys, Competition)

Product Improvement:

Medium Standard Accommodation Development & Improvement
Camping Sites standard up grading
Sport & Active Tourism Facility Improvement & Development

Priority Group: I

Focus to: Austrian Incoming Tourism to Poland

Market Development Phase: Growing

Main Segments - Present & New / Main Products - Present & New	Golden Age (package tours)	Businessmen	Hobbyists [1] (independent & package tours)	Ethnic (independent)	Younger
CITY BREAKS	X	X		X	X
TOURING		X		X	X
ACTIVE TOURISM:					
* Sailing			X		X
* Canoeing			X		X
* Horse Riding			X		X
SPECIAL INTEREST:					
* Eco-Tours			X		
* Gliding			X		
EVENTS:				X	
* Cultural Events	X	X	X		

[1] Special Interest Clubs Members & Special Interest Magazines Subscribers

Main Polish Competitors: Hungary, Czech & Slovak Republics

Emphasis on:

Short Breaks Trips & Third Holidays
Package Tours
Contacts with Austrian Trade
Leading Role of NTIC in Vienna (open in 1995), with support from ORBIS & LOT Offices Abroad

Marketing Mix:

Public Relation:
- Study Tours for Journalists & Guide Authors
- News Letter + Press Conferences

Trade Marketing:
- Fam-Trips & Seminars/Workshops for Travel Agents & Tour Operators

Consumer Marketing:
- Tourist Information Flow - NTIC & LOT, ORBIS Offices

Printed Materials:
- Production & Distribution

Marketing Research:

Border Crossing Surveys & Market Analysis (IOT)
Start Market Monitoring & Intelligence (NTIC)

Priority Group: I

Focus to: Italian Incoming Tourism to Poland

Market Development Phase: Initial

Main Segments - Present & New Main Products - Present & New	Ethnic	Younger	Businessmen	Hobbyists/ Group of Interest[1]	Golden Age
CITY BREAKS	X		X		X
TOURING	X		X		X
SPECIAL INTEREST: * PILGRIMAGE TOURS * Health Oriented Holidays (future) * hunting * Eco-Tours	 X	 X X X X		 X X X X	 X X
EVENTS: * Cultural Events	 X		 X		 X
ACTIVE HOLIDAYS: * Sailing * Canoeing * Horse Riding		 X X X			

[1] Special Interest Clubs Members & Special Interest Magazines Subscribers or Church/Religious Communities

Main Geographic Segments: North West & North East Italy

Main Polish Competitors: Hungary & Czech Republic

Emphasis on:

Inclusive Tours & Package Tours
Establish Contact with Italian Trade
Establish Contact with Italian Press/Media
Leading Role of the NTIC in Rome (open in 1995), with support from LOT & ORBIS Offices Abroad

Marketing Mix:

Marketing Campaign (1994-95)
- Public Relation:
  - Study Tours for Journalists & Guide Authors
  - News Letter + Press Conferences
- Trade Marketing:
  - Fam-Trips & Seminars/Workshops for Travel Agents & Tour Operators
  - Tourism Fairs
- Consumer Marketing:
  - Tourist Information Flow - NTIC & LOT, ORBIS Offices
  - Advertising (to limited extend)
- Printed Materials:
  - Production & Distribution
- Special Events:
  - Polish Evenings/Days etc. (Partnership with Polish Representation in Italy - Embassy & Trade Missions etc.)

Marketing Research:

Border Crossing Surveys & Market Analysis (IOT)
Start Market Monitoring & Intelligence (NTIC)
Other (Image Surveys)

Priority Group: II

Focus to: French Incoming Tourism to Poland

Market Development Phase: Initial Stage

Main Segments Present & New Main Products Present & New	Younger (independent + individually via agency)	Golden Age (Package + individually via agency)	Hobbyists [1]	Businessmen	Ethnic
CITY BREAKS	X	X		X	X
TOURING	X	X		X	X
MOUNTAINS	X				X
SPECIAL INTEREST: *hunting *angling *PILGRIMAGE TOURS ACTIVE HOLIDAYS:	 X	 X	 X X		 X

[1] Special Interest Clubs Members & Special Interest Magazines Subscribers or Church/Religious Communities

Main Geographic Segments: Great Paris, North France
Main Polish Competitors:

Emphasis on:

Inclusive Tours & Package Tours
Establish Contacts with French Trade
Establish Contacts with Tourist Press
Leading Role of the NTIC in Paris with support from LOT & ORBIS Offices

Marketing Mix:

Public Relation:
- Study Tours for Journalists & Guide Authors
- News Letter + Press Conferences

Trade Marketing:
- Fam-Trips & Seminars/Workshops for Travel Agents & Tour Operators
- Tourism Fairs

Consumer Marketing:
- Tourist Information Flow - NTIC & LOT, ORBIS Offices

Printed Materials:
- Production & Distribution

Marketing Research:

Border Crossing Surveys & Market Analysis (IOT)
Start Market Monitoring & Intelligence (NTIC)

Priority Group: II

Focus to: Scandinavian Incoming Tourism to Poland

Market Development Phase: Initial

Main Segments -Present & New Main Products - Present & New	Younger	Golden Age	Ethnic	Hobbyists [1]	Businessmen
CITY BREAKS	X	X	X		X
TOURING	X	X	X		X
MOUNTAINS			X		
*Trekking	X			X	
SEASIDE:			X		
*Health Oriented Holidays		X			
SPECIAL INTEREST:					
*Hunting				X	
*Angling				X	
ACTIVE HOLIDAYS:					
*Horse Riding	X			X	
*Climbing	X			X	
*Winter Sports					

[1] Special Interest Clubs Members & Special Interest Magazines Subscribers

Geographic Segments: Sweden - South & Great Stockholm, Denmark - Whole

Main Polish Competitors:

Emphasis on:

Longer Holidays (Summer & Winter)
Independent Travellers
Partnership with Ferry Lines
Leading Role of the NTICs in Stockholm

Marketing Mix:

Marketing Campaign in Denmark (1994-95)
Public Relation:
- Press Conferences + News Letter
- Study Tours for Journalists (Press/TV) & Guide Authors

Trade Marketing:
- Fam-Trips for Travel Agents & Tour Operators (according to the segmentation & TTOO specialisation)
- Tourism Fairs

Consumer Marketing:
- Tourism Information Flow via NTIC's and other Polish Offices Abroad (LOT, ORBIS)
- Advertising (to limited extend)

Printed Materials:
- Publication & Distribution via NTICs & other Polish Offices Abroad (LOT, ORBIS)

Special Events:
- Organise in Partnership with Polish Embassies, Trade Missions etc.

Marketing Research:

Border Crossing Surveys & Market Analysis (IOT)
Market Intelligence & Monitoring (NTIC)
Other

POLISH MARKETING REPRESENTATIVES ABROAD
Polish Offices Abroad

GERMANY

National Tourism Information Centre

Köln

Polish Airlines LOT Offices

Köln
Berlin
Frankfurt/Mein
Hamburg
Düsseldorf

POLORBIS REISE UNTERNEHMEN GMBH

Köln
Hamburg
Berlin
Stuttgart

AUSTRIA

Vienna

Polish Airlines LOT Offices

Vienna

ORBIS Foreign Information Centres

Vienna
Linz

GREAT BRITAIN

National Tourism Information Centre

London

Polish Airlines LOT Offices

London
Manchester

ORBIS Foreign Information Centres

London

SCANDINAVIA

National Tourism Information Centres

Stockholm

Polish Airlines LOT Offices

Copenhagen
Oslo
Stockholm
Helsinki

ORBIS Foreign Information Centres

Stockholm
Malmö

USA / CANADA

National Tourism Information Centres

New York
Chicago

Polish Airlines LOT Offices

Chicago
Chicago, O'Hare
Los Angeles
Montreal
New York
Seattle
Toronto

ORBIS Foreign Information Centres

New York

BENELUX

National Tourism Information Centres

Amsterdam
Brussels

Polish Airlines LOT Offices

Amsterdam
Schiphol
Brussels
Brussels National

ORBIS Foreign Information Centres

Amsterdam
Brussels

ITALY

National Tourism Information Centres

Rome

Polish Airlines LOT Offices

Rome
Milan

ORBIS Foreign Information Centres

Rome

FRANCE

National Tourism Information Centres

Paris

Polish Airlines LOT Offices

Paris
Lyon

ORBIS Foreign Information Centres

Paris

ORBIS Foreign Information Centres

Amsterdam
Brussels

ITALY

National Tourism Information Centres

Rome

Polish Airlines LOT Offices

Rome
Milan

ORBIS Foreign Information Centres

Rome

FRANCE

National Tourism Information Centres

Paris

Polish Airlines LOT Offices

Paris
Lyon

ORBIS Foreign Information Centres

Paris