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PHARE PROGRAMME
TOURISM DEVELOPMENT IN POLAND
ROZWÓJ TURYSTYKI W POLSCE

DRAFT
OPERATIONAL MARKETING PLAN
1995

WORKING PAPER
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PHARE PROGRAMME TOURISM DEVELOPMENT IN POLAND

**DRAFT
OPERATIONAL MARKETING PLAN
1995**

by

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&

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THE OPERATIONAL MARKETING PLAN 1995

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INTRODUCTION

This Plan is drawn up more as an Operations Programme than a strategic Plan. It should be associated with the Marketing Plan 1995-1999.

Despite the fact that tourism promotion to Poland has not had the benefit of a sophisticated national tourism promotion structure or reasonable budgets, it has performed well in terms of revenue earned. According to the Institute of Tourism in Warsaw (IOT) Poland's revenue from out of state tourism amounted to 4.5 billion US Dollars in 1993 and indications are that revenue for 1994 will exceed 5 billion US Dollars.

Approximately 7% VAT would be paid on this figure which amounts to approximately 350 million US Dollars. In considering the amount of money to be made available for a promotional budget for 1995 the Government should bear those figures in mind. An allocation of 10% of the above VAT figure that is 35 million US Dollars would not be unreasonable. In establishing a budget at the present time the Government should take note that the private sector in Poland is not well developed in terms of size or finance. It is for that reason that the Government at this stage needs to put up almost the total promotional budget. As tourism grows in Poland and the private sector expands in business and finance the Government will be able to reduce its budget input for promotion.

2. PURPOSE

The purpose of this operations programme is to set guidelines for promotional activities in the priority source markets established in the 1995-1999 Marketing Plan during 1995. Recommendations for the promotional mix are made on the basis of statistics available which indicate the attractions of the Polish product for the different markets.

3. OBJECTIVE

The objective of this operations programme is the same as that of the 1995-1999 Marketing Plan, i.e.:

- To increase the level of economic activity in Poland through increasing demand within the tourism sector. This means that through the marketing and promotion of tourism the SSTA aims 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.

STRATEGY

The Marketing Plan for 1995-1999 outlines the strategy which is relevant for the 1995 Operations Programme. The strategy is to concentrate promotions on the selected main source markets which are:

1) Europe

- a) Germany
- b) Sweden and Denmark
- c) Belgium and Holland
- d) The UK, particularly England
- e) France
- f) Italy
- g) Austria

2) North America

- a) The USA

It has been established that there are adequate offices of Polish tourism interests to service consumer enquiries in the above markets. Such offices include NTICs, as well as the offices of LOT Polish Airlines, Polorbis and Orbis.

The promotional mix will be used as relevant in the selected markets.

5. THE PRODUCT

Poland has four major recognisable product to offer the tourists:

The Baltic Sea

The Southern Mountains

The Mazurian Lakes

Historical Cities

Other products, such as Conferences and Conventions can be developed. There is an element of religions or pilgrim traffic to Poland but this is difficult to promote.

There are facilities to practice many special interests, such as fishing, pony and horse riding, aquatic sports such as sailing and windsurfing. Mountain and hill climbing and trekking can be undertaken and in winter there are facilities for winter sports.

Polands main product is based on the historical and cultural interest of its many historic cities and towns. The touring holiday is based on these interests and is highly promotable. There is also for Poland, the possibility of being included in touring holidays, which include cities from other countries, e.g. Berlin, Prague, Budapest.

6. ACCESS TRANSPORT

In the Marketing Plan for 1995-1999 we have established that for the present there is adequate access transport to Poland from the main source markets as far as our sea and train transport is concerned. The road system and standard in Poland needs to be improved to bring it up to the standard of Western European countries (see Marketing Plan 1995-1999).

7. MARKETING MIX

(i) Corporate Identity of Poland

Poland needs a logo and/or slogan which could be used in all its advertising and print and which would in time be identified with Poland. There would be many ways in which the logo could be used particularly in the tourism area. Hotels and guest houses which are approved by the SSTA, as well as tour operators handling incoming traffic and LOT the national airline might use it in its tourism promotion print.

The consultancy which is appointed to carry out the major promotion campaign will be required to design a "LOGO" for use in Polish tourism promotions. It will be used on posters, brochures and other forms of print and will be available for the use of regions.

(ii) Travel Trade Promotions

Travel trade promotions will include the following:

- * Agents and tour wholesalers study and purchasing tours
- * Agents familiarisation
- * Seminars and workshops
- * Sales calls on agents and wholesalers by NTIC staff
- * Joint promotions in the markets by wholesalers, agents and NTIC staff aimed at the consumer e.g. Polish Promotional Evenings
- * Advertising in travel trade press
- * Familiarisation for travel trade press

(iii) Public Relations

Activities included under Public Relations will be:

- * Familiarisation visits to Poland for selected journalists from the markets. These will include journalists from newspapers, magazines, radio and TV.
- * Press conferences in the markets
- * Press conferences in Poland (part of tourism awareness)
- * Newsletters for journalists and travel trade
- * Regular issue of topical tourism information on Poland to NTICs
- * Study tours for foreign journalists based in Poland
- * Invitations to foreign journalists based in Poland to tourism conferences.

(iv) Print

This includes all types of brochure from the major image brochure to special interest brochures. It includes maps, special event leaflets and a sales information manual. The sales information manual should be produced in cooperation with the NTICs and the private sector. Ideally it should be a loose leaf type for easy updating.

The promotion of conferences and conventions requires a very good quality glossy brochure to give details of facilities i.e. convention centres, hotels, transport, entertainment etc.

Good quality brochures are an essential to tourism promotion.

(v) Advertising

This covers consumer advertising in newspapers, magazines, radio and TV, etc. as well as advertising aimed at the travel trade in travel trade magazines. Consumer advertising should only be undertaken, in general, when Polish holiday programmes are available to the consumer through tour wholesalers and retail agents. Exceptions to this would be in markets where surveys indicate that a small number of tourists use agents and travel mostly on a private individual base. In considering advertising to the consumer attempts should be made to arrange co-operative advertising with LOT Polish Airlines and other product producers such as hotels etc.

Specialist magazines should be used to advertise special interest.

(vi) Tourism and Travel 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 from the public and private sector to work together for their mutual benefit, however participation at trade fair needs advance planning and follow up. See Marketing Plan 95 to 99 and study by Carmen Altes.

(vii) Audio Visuals

The use of audio visuals on tourism promotion is now taken for granted. A video tape of a specific product can do more selling than the best salesman. Video tapes can be used to very good effect in the sale of conferences and conventions.

The multi media type of audio visuals can be very effective at trade fair or Polish evenings. The production of audio visuals needs to be very professional and NTICs and other promotional entities should be consulted. Videos intended for use in sales calls should not last longer than about ten minutes, because wholesalers and others decision makers have limited time to devote to individual salesman.

8. MARKET RESEARCH

Market research is undertaken to find out information about markets and about the perception of Poland as a holiday destination in the eyes of the consumer in the source market. See also Marketing Plan for Poland 1995-1999.

There is a need to undertake attitude studies in most markets and surveys of departing tourists at airports or other frontiers can yield valuable information on the good and bad aspects of the product. The NTICs have a very important role to play in feeding back information to the SSTA. This is known as market intelligence which emanates from contacts in the source markets travel trade and is useful in getting advance information on trends. As much source market information as possible is needed to plan promotional activities and this can be obtained through surveys and market intelligence.

9. AGENCIES INVOLVED IN PROMOTIONS

(i) SSTA

As the government department responsible for the development of tourism in Poland, the SSTA has the overall control of tourism including budget and organisation.

(ii) PAPT

This is the agency responsible for tourism promotion. It handles all aspects of print and audio visuals. It also handles familiarisation visits on behalf of the SSTA and NTICs. It has close liaison with the NTICs and it is recommended that the NTICs should report to PAPT on promotional activities.

(iii) The NTICs have responsibility for promotional activities in the source markets. This covers promotions through the travel trade and consumers and public relations activities.

(iv) Institute of Tourism (IOT)

The IOT is responsible for the collection and dissemination of data on tourist arrivals.

(v) LOT Polish Airlines

LOT is probably next to the NTICs the most active promoter of tourism in the markets and close liaison should be maintained by all promotional agencies with LOT.

(vi) Contact should be maintained with the private sector through the establishment of committees with public and private sector representatives to handle certain aspects of promotions e.g. advertising, public relations, study tours and familiarisation visits.

10. BUDGET

The following is a suggested breakdown of budget by percentage and by market:

SUGGESTED BREAKDOWN OF BUDGET BY MARKET AND PERCENTAGES

	%
1. US and Canada	15
2. Germany	15
3. United Kingdom	10
4. Scandinavia	10
5. Benelux	10
6. France	15
7. Italy	10
8. Austria	10
9. Domestic	5
	<hr/>
	100

Major promotional campaigns take place in Germany, United Kingdom, Scandinavia, Benelux and Italy during 1994/1995.

The breakdown of the actual budget requires inputs from the Directors of the NTICs, PAPT, the Institute of Tourism and the SSTA.

11. TIMING

The budget should be decided early enough to allow promotional activities to be prepared well in advance of the years. It is recommended that the budget should be decided at the latest by October.

12. MONITORING AND CONTROL

The monitoring and control of promotional activities is the responsibility of the Promotions Department of the SSTA in cooperation with PAPT and the NTICs.

ANNEXES

The Annexes included:

- Annex 1. Characteristics of tourism arrivals to Poland in 1993
- Annex 2. Product/Market portfolio
- Annex 3. Market priorities and main marketing criteria
- Annex 4. Characteristics of target markets
- Annex 5. Priority source markets
 - Activities of tourists from source markets
 - Suggested promotional activities by market
 - a) North America
 - b) Germany
 - c) Great Britain
 - d) Benelux
 - e) Austria
 - f) Italy
 - g) France
 - h) Scandinavia
 - i) Former USSR
 - j) Czech & Slovak Republics
- Annex 6. Percentage structure of budget activity by market
- Annex 7. Percentage structure of the budget-activities agencies involved
- Annex 8. Timetable of activities with budget

CHARACTERISTIC OF TOURISM ARRIVALS TO POLAND IN 1993

Geographic Market	TOTAL	D	f.USSR	C - S	A	Scandinavia	Benelux	F	Other Europe	USA/C
Characteristic										
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	TOTAL	D	f.USSR	C - S	A	Scandinavia	Benelux	F	Other Europe	USA/ C
Characteristic										
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	TOTAL	D	f.USSR	C - S	A	Scandinavia	Benelux	F	Other Europe	USA/ C
Characteristic										
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

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

Based on the Surveys of the Institute of Tourism

XX - Very important
X - Important
(X) - Prospective

PRODUCT / MARKET PORTFOLIO

Geographic Market	D	USSR	C-S	A	Scandinavia	Benelux	F	I ¹	GB ¹	USA/C	Total
Type of Product	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 4,350	57.7 277	36.8 85	40.6 149	37.5 101	56.7 106	69.0	59.0	64.7 107	54.9 9,333
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 1,989
Countryside Holidays	15.6 1,061	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 1,615
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

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%.

Business Tourism ²⁾ :											
*business visits	31.0	15.5	12.5	23.5	18.5	21.7	43.6	52.0	32.0	27.0	23.4
	2108	1163	60	55	68	58	82			45	3978
*fairs,conferences & exhibitions	4.1	9.4	3.9	2.6	2.7	3.9	12.0	4.0	3.0	2.7	6.4
	279	705	19	6	10	10	22			4	1088
*other business purposes	4.1	3.9	3.3	12.0	2.6	16.6	4.7	2.0	16.0	5.1	4.5
	279	293	16	28	10	45	9			8	765

Based on the Institute of Tourism Data

MARKET PRIORITIES & MAIN MARKETING CRITERIA:

- * 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

Important for budgeting:

- * Phase of market development
- * Cost of marketing
- * Competitors position

GEOGRAPHICAL TARGET MARKETS FOR POLAND:

Criterium Target Market	Incoming Tourism to Poland in 1993					Outgoing Tourism in (000) Rank	Priority Group	rade Priority Rank
	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			
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	19,841 5	I	
Belgium	79,7 13	79,7 13	7.1 4	174 12	22 13	I.i. 8	III	
Austria	231,9 4	231,9 4	4.3 11	284 7	53 4	I.i. 8	I	
Italy	123,5 10	123,5 10	4.9 10	393 4	66 1	17,263 7	I	
USSR	8120,9 2	7500 2	3.8 12	160 13	33 9	I.i. 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	I.i. 8	II	
Denmark	115,3 11	115,3 11	5.9 7	311 6	45 6	I.i. 8	II	
Czech & Slovak Republics	8043,3 3	480,0 3	0.1 15	32 16	29 11	I.i. 8	III	
Finland	35,4 15	35,4 15	6.9 5	392 5	50 5	I.i. 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	I.i. 8	III	
Hungary	164,5 8	164,5 8	3.0 13	68 14	17 14	I.i. 8	III	

Source: Institute of Tourism, WTO

I.i. - less important as tourism generating markets

PRIORITY GROUPS:

I GROUP

USA
GERMANY
GREAT BRITAIN
THE NETHERLANDS
AUSTRIA
ITALY

II GROUP

USSR
FRANCE
SWEDEN
DENMARK
HUNGARY

III 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 Behaviour	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	
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	*

Geographical	Type of Product	Tourism Behaviour	Demographic Description			
Market 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	
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	*

Priority Group: I
North American Incoming Tourism to Poland
Market Development Phase: Growing

Main Segments - Present & New	Ethnic	Golden Age	Hobbyists ¹⁾	Businessmen
Main Products - Present & New				
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 to:

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

MARKET: NORTH AMERICA (USA)

Project Code	Type of Activity (PROJECT NAME)	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

Priority Group: I
German Incoming Tourism to Poland
Market Development Phase: Developed

Main Segments - Present & New	Nostalgic	Golden Age	Young	Ethnic	Hobbyists ¹⁾	Businessmen
Main Products - Present & New						
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 *Canoing *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 to:

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 Automobili Club Association)
& individual tourists coming via travel agents (inclusive tours)

Leading Role of the NTIC in Köln

MARKET: GERMANY

Project Code	Type of Activity (PROJECT NAME)	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

Priority Group: I
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 to:

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

MARKET: GREAT BRITAIN

Project Code	Type of Activity (PROJECT NAME)	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

Priority Group: I
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 ²⁾
CITY BREAKS	X		X	X	
TOURING	X		X	X	
MOUNTAIN HOLIDAYS *trekking	X				X
ACTIVE HOLIDAYS: * sailing * canoing * horse riding * winter sports * cycling SPECIAL INTEREST: * Eco-Tours * Angling * Gliding	X X X X X	X X X X X			X X X
		X X X			

¹⁾ Special Interest Clubs Members & Special Interest Magazines Subscribers

²⁾ With special regard to Automobil Association Clubs & Caravans Owners

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

Emphasis to:

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

MARKET:

BENELUX (THE NETHERLANDS, BELGIUM & LUXEMBURG)

Project Code	Type of Activity (PROJECT NAME)	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

Priority Group: I**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 * Canoeing * Horse Riding			X X X		X X X
SPECIAL INTEREST: * Eco-Tours * Gliding EVENTS: * Cultural Events			X X		
	X	X	X	X	

¹⁾ Special Interest Clubs Members & Special Interest Magazines Subscribers

Main Polish Competitors: Hungary, Czech & Slovak Republics

Emphasis to:

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)

MARKET:

AUSTRIA

Project Code	Type of Activity (PROJECT NAME)	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

Priority Group: I
Italian Incoming Tourism to Poland
Market Development Phase: Initial

Main Segments - Present & New	Ethnic	Younger	Businessmen	Hobbyists/ Group of Interest ¹⁾	Golden Age
Main Products - Present & New					
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 * Canoing * 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 to:

- 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 fro LOT & ORBIS Offices Abroad

MARKET:

ITALY

Project Code	Type of Activity (PROJECT NAME)	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

Priority Group: II
French Incoming Tourism to Poland
Market Development Phase: Initial Stage

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

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

MARKET:

FRANCE

Project Code	Type of Activity (PROJECT NAME)	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

Priority Group: II/III
Scandinavian Incoming Tourism to Poland
Market Development Phase: Initial

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

¹⁾ Special Interest Clubs Members & Special Interest Magazines Subscribers

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

Main Polish Competitors:

Emphasis to:

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

MARKET: SCANDINAVIA (SWEDEN, DENMARK, NORWAY & FINLAND)

Project Code	Type of Activity (PROJECT NAME)	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

Priority Group: II

Focus to: Former USSR Incoming Tourism to Poland

Market Development Phase: Growing

Main Segments - Present & New Main Products - Present & New	Young & Middle Age (package tours)*)	Businessmen
TOURING	X	X
CITY BREAKS	X	X
Fairs, Exhibitions & Conferences		X

*) Often purpose of the visit is mixed - tourism & trading & shopping.

Main Polish Competitors: Czech & Slovak Republics

Emphasis to:

Package Tours
Contact with the Trade
Influence via LOT & ORBIS Offices

MARKET:

USSR

Project Code	Type of Activity (PROJECT NAME)	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

Priority Group : III**Focus to: Czech & Slovak Incoming Tourism to Poland****Market Development Phase: Growing**

Main Segments - Present & New Main Products - Present & New	Younger & Middle Age ¹⁾ (independent)	Families	Golden Age	Hobbyist / Groups of Interest ¹⁾
CITY BREAKS	X			
COUNTRYSIDE HOLIDAYS		X	X	
LAKES & FOREST HOLIDAYS		X		
MOUNTAIN HOLIDAYS * Trekking	X	X		
ACTIVE TOURISM: * Cycling * Sailing * Canoeing	X X X			x X X
SPECIAL INTEREST: * Pilgrimage Tours * Health Oriented Holidays (cheap accommodation)			X	X

¹⁾ Special Interest Clubs Members & Special Interest Magazines Subscribers or Religious Communities²⁾ Large amount of One-Day-Shoppers

Main Polish Competitors: Western Europe

Emphasis: Contact with Travel Trade

TIME TABLE

Project Code	PROJECT NAME	Responsible Agency	BUDGET	TIME	Evaluation
1.	Marketing Campaign				
2.	Public Relation News Letter for Press Study Tours for Journalists & Guide Authors Press Conferences Reception/Special Events				
3.	Sales Promotion Tourism & Travel Fairs Study Tours/Fam-Trips for Wholesalers Study Tours/Fam-Trips for Travel Agents Travel Agents Workshops/Seminars Trade/Sale Manual Communication Network Development				
4.	Advertising Press Advertising -Trade Press -Consumer Press -Special Interest Magazines				
5.	Printed Materials Image Brochure Regional Brochure Special Interest Brochure Other				
6.	Audiovisuals Films Video Multimedia				
7.	Marketing Research Market & Analysis Surveys Market Intelligence				

PERCENTAGE STRUCTURE OF THE BUDGET ACTIVITY/MARKETS

MARKET	TOTAL	D	USA	GB	NL, B	A	I	f.USSR	F	S	DK	Scand inavia	Others
MARKETING MIX													
TOTALS													
MARKETING CAMPAIGNS:		X		X	X		X				X		
ADVERTISING: Consumer: * Radio * TV * Consumer Press * Special Interest Magazines * Direct Mail * Door-to-Door Trade: * Trade Magazines													
PUBLIC RELATION: * Fam-Trips for Journalists - TV, Press, Guide Authors * Press Conferences * News Letter * Special Events/Reception													

MARKET	TOTAL	D	USA	GB	NL, B	A	I	f.USSR	F	S	DK	Scand inavia	Others
MARKETING MIX													
SALES PROMOTION: * Study Tours - Wholesalers * Fam-Trips - Travel Agents * Trade Workshops & Seminars * Trade Fairs * Consumer Fairs * Trade Manuals Distribution: * CRS * DIS * Tourist Information													
PRINTED MATERIALS: * Image Brochure (languages) * Special Interest Brochures * Regional Brochures * Maps * Posters * Distribution													
AUDIOVISUALS: * Films * Video * Photo-Library (Image Bank) * Diapositives * Multi Media * Distribution													
MARKETING RESEARCH: * Surveys * Market Analysis * Market Intelligence * Data Bank * Flow of Research Data													

MARKET	TOTAL	D	USA	GB	NL, B	A	I	f.USSR	F	S	DK	Scand inavia	Others
MARKETING MIX													
COOPERATIVE MARKETING: * Private Sector * Public Sector (Regions)													
MARKET PRIORITY													

D - Germany
 USA - United State of America
 NL - The Netherlands
 B - Belgium
 GB - Great Britain

S - Sweden
 f.USSR - former USSR
 F - France
 A - Austria
 I - Italy
 DK - Denmark

PERCENTAGE STRUCTURE OF THE BUDGET - ACTIVITIES/AGENCIES INVOLVED

AGENCIES	TOTAL	NITCs	PAPT	IT	SSTA	Private Sector	Public Sector	OTHER
MARKETING MIX								
TOTALS								
MARKETING CAMPAIGNS:								
ADVERTISING: Consumer: * Radio * TV * Consumer Press * Special Interest Magazines * Direct Mail * Door-to-Door Trade: * Trade Magazines								
PUBLIC RELATION /PUBLICITY: * Fam-Trips for Journalists - TV, Press, Guide Authors * Press Conferences * News Letter * Special Events Reception								
SALES PROMOTION: * Study Tours - Wholesalers * Fam-Trips - Travel Agents * Trade Workshops & Seminars * Trade Fairs * Consumer Fairs * Trade Manuals/ Sale Manuals Distribution: * CRS * DIS * Tourist Information								

AGENCIES	TOTAL	NITCs	PAPT	IT	SSTA	Private Sector	Public Sector	OTHER
MARKETING MIX								
PRINTED MATERIALS: * Image Brochure (languages) * Special Interest Brochures * Regional Brochures * Maps * Posters * Distribution								
AUDIOVISUALS: * Films * Video * Photo-Library (Image Bank) * Diapositives * Multi Media * Distribution								
MARKETING RESEARCH: * Surveys * Market Analysis * Market Intelligence * Data Bank * Flow of Research Data								
COOPERATIVE MARKETING:								

NTICs - National Tourist Information Centres Abroad
PAPT - Polish Agency for Tourism Promotion
IT - Institute of Tourism
SSTA - State Sport & Tourism Administration

BIBLIOTEKA IT
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Naukowo-Zadawczych