

THE IMAGE OF POLAND AS A TOURIST DESTINATION

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ABSTRACT: The paper presents the results of a primary data analysis examining the tourists' perceptions of Poland as a tourist destination. The researcher analyzed the data collected in 2013 regarding tourists' satisfaction with the package holidays in Poland. The aim of the research study was to analyze the tourists' opinions concerning the most important destination attributes crucial for travelers. Poland is not perceived as a typical tourist destination, however, due the investments in tourist infrastructure, its cultural heritage and other changes related to the accession to the European Union, Poland has become the country which offers many opportunities for business and individual travelers. Given the observed changes, it was hypothesized that Poland is perceived as an attractive tourist destination by visitors, but it is not promoted sufficiently in foreign markets. The surveyed sample of tourists spent their holiday on the coach tours in Poland with the programs including the major Polish cities and the most important tourist attractions. The total sample volume was 463 travelers. The paper presents the results of the quantitative analysis focused on the tourists' evaluations of the distinguished tourism product attributes and qualitative analysis examining tourists comments regarding their perceptions of Poland as a tourist destination. The conclusions of the study are concerned with the recommendations regarding the communications message and communications channels that should be used in order to achieve a higher awareness of Poland as a tourist destination. **Keywords:** destination image, image attributes, package holiday services, product quality perception

INTRODUCTION

Competition among tourist destinations has become more intense over last years. Investments in tourism infrastructure, development of the new tourist attractions and products, introducing new tourist destinations, development of the promotional programs aimed at building the desired image of destinations as well as intensifying price competition among tour operators and other tourist services providers are the characteristic features of the today's tourism market. Thus, tour operators are challenged with the constant need to adjust market offering to more and more sophisticated needs and wishes of customers. Considering the impact of the country's tourist destination image on travelers' decisions, tour operators in less popular tourist destinations face more severe competition.

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Poland is not perceived as a typical tourist destination, however, due the investments in tourist infrastructure, its cultural heritage and other changes related to the accession to the European Union, Poland has become the country which offers many opportunities for business and individual travelers. But, the perceptions of Poland as a traditional and agricultural country, connotations with World War II, concentration camps, and Eastern Block have an impact on the image of Poland as a tourist destination. The change of the image and attracting more tourists requires much more effort put in the promotional activities adapted to the various markets.

The paper presents the results of a quantitative analysis and a qualitative analysis examining tourists perceptions of Poland as a tourist destination. The aim of the analysis was to identify the distinct associations with Poland that differentiate it from other tourist destinations and make it a unique country to travel, visit, and experience. Another important goal of this analysis was to investigate tourists opinions on the possible ways to improve the promotional activities aimed at promoting Poland as a tourist destination. The implications of the research findings are discussed with regard to destination marketing organizations, tour operators and other tourist services providers.

Promoting tourist destination image

Before tourists go to a destination they develop the image and a set of expectations based on previous experience, word of mouth, common beliefs, advertising, and other means of communications (Chon, 1992; Baloglou and Bringmerg, 1999). Destination image is formed by gathering information about destination from various sources over time (Leisen, 2001). Thus, the image of a destination can be defined as the individual perceptions of the characteristics of destinations (Coshall, 2000), including the environmental attributes as well as service attributes, that can be influenced by various factors.

Destination image has direct impact on travel behavior and plays a crucial role in the selection of vacation destinations (Bigne et al, 2001, Bonn at al, 2005), since usually tourists choose destinations with the most favorable image (Gartner, 1993). Moreover, destination image can contribute to forming destination brand, which may have an impact on customer loyalty to a destination. (Tasci and Kozak, 2006). Taking into account those issues, it is important to develop a communications strategy aimed at creating a favorable image of a destination. Thus, it is necessary to identify the destination attributes important for specific target audiences as well as the points of differentiation.

Since tourists have numerous destination choices, a destination should be very specific about the benefits it offers and the tourism

market should be carefully segmented in order to adjust the marketing activities to various target audiences and attract the right customers (Morgan et al, 2004). Due to the complicated and complex character of destinations, developing and sustaining a place brand requires specific marketing solutions. Destination marketing activities are generally performed by the destination marketing organizations along with other entities concerned with tourism and regional development.

Typically, there are three fundamental levels at which destination marketing organizations function. At the country level, the organization is usually referred to as the National Tourism Organization responsible for marketing a country as a tourism destination. At the state or provincial level, the organization may be referred to as the State Tourism Office or the Provincial Department of Tourism with overall responsibility for marketing a state, province or territory. At the regional level, the organization is commonly identified as a Convention and Visitor Bureau which is in charge of marketing a concentrated tourism area as a tourism destination (Pike, 2008).

Positioning a destination in the minds of a target group lies within the responsibilities of destination marketing organizations and is crucial for the overall success of the communications strategy. Furthermore, the appropriate market positioning strategy aimed at emphasizing the unique destination attributes enables to find competitive advantage and distinguish a tourism destination from other destinations (Ibrahim and Gill 2005). Developing a positioning strategy for tourism destinations is a long and complex process that implies multiple steps: identifying the attributes that are valuable to a target group, correlating specific attributes with segmentation variables within the target group, positioning the destination benefits to support an existing image or create a new one, and communicating those benefits to the target group.

The traditional approach to destination positioning is based on promoting the most attractive destination attributes to a target group of customers, however, more recent approaches suggest considering tourists' expectations, needs and preferences regarding tourist destinations as well as their satisfaction with the tourism products' attributes as crucial for the identification of the unique destination attributes. (Ibrahim and Gil, 2005).

Therefore, destination marketing organizations should consider the existing image of a destination, customers' needs and preferences, and customers' satisfaction with the tourism products while designing a communications strategy aimed at creating a favorable image of the destination and attracting foreign visitors. Moreover, it is necessary to adjust the communications message and tools to the specific character and preferences of target customers. Since destination images held by tour operators and travel agents are important for the tourism desti-

nation and information system (Baloglou et al., 2001), the communications strategy should be also directed at tourism product distributors.

There were numerous research studies regarding positioning of destination image. Baloglu and Brinberg (1997) were the first to publish research on affective reactions to destinations explicitly adopting the circumplex model. Then, other researchers published studies on cognitive and affective images of destinations, asking respondents to rate the affective image on the two dimensions of affect (Beerli and Martín, 2004; Pike and Ryan, 2004), on the four dimensions (Baloglu, 2001; Baloglu and Love, 2005; Hernández-Lobato et al., 2006; Li et al., 2010; Lin et al., 2007; Phillips and Jang, 2010; San Martín and Rodríguez del Bosque, 2008), and on other similar items (Edwards et al., 2000; Vaughan and Edwards, 1999). In this study, the researcher analyzed the tourists' evaluations of tourism product attributes affecting their holiday experience, which were classified into two groups: the package holiday services offered by the tour operator and the external destination attributes beyond the tour operator's control.

The perceptions of Poland as a tourist destination

In Poland, tourist promotion is the responsibility of the Polish Tourist Organization, which is concerned with promoting Poland as an attractive tourist destination both in Poland and abroad. It conducts activities aimed at encouraging foreign visitors to come to Poland and increasing their number. Polish Tourist Organization pursues its long-term promotion policy based on the document entitled *Marketing Strategy of Tourism in Poland for the years 2012-2020* (Polska Organizacja Turystyczna, 2011), which is an updated version of the document describing the marketing strategy for the years 2008-2015 (Polska Organizacja Turystyczna, 2008). Its numerous tasks include: organizing the conferences, seminars, and trainings, issuing promotional publications about Poland; developing the Internet tourist information system; performing statistical analysis, marketing expertise and prognostic studies in the field of tourism; and initiating and supporting the organizational measures taken by the competent authorities for the development of tourism infrastructure, tourism products, and their promotion (www.pot.gov.pl, accessed January 2014).

Shaping the image of a country is a long-term process, which requires a consistent strategy based on the established plan and scheduled tasks. Moreover, it is necessary to conduct studies on the perceptions of Poland as a tourist destination and assess the effectiveness of the communications campaigns carried out in different markets. Basing on the knowledge of the various markets, the existing image of Poland, and the tourism products' preferences, it is possible to

adjust the promotional activities to the specific character of a given target audience.

Considering the market attractiveness and the position of Polish tourism in particular markets, priority markets have been distinguished. The most attractive markets with a huge growth potential include: Germany, Great Britain, France, Italy, Denmark, Norway, Sweden, Russia, and Ukraine (Polska Organizacja Turystyczna, 2011). Thus, PTO has commissioned a number of studies to identify the image of Poland as a tourist destination in the priority markets, specify tourist travel habits and preferences, and assess the effectiveness of the conducted communications campaigns aimed at promoting Poland as an attractive country for visitors. Since the image of a country as a tourist destination should be considered in the broader context, the research tasks included also the evaluation of destination image of the Central and Eastern Europe as well as competing destinations.

Although the results of the studies indicate a negative image of the Central and Eastern Europe, which is perceived as a post-communist, uninteresting, drab and cold region, the perceptions of particular countries are more positive. The respondents have the widest knowledge on Poland, Czech Republic, and Hungary, however, they perceive Czech Republic (Prague) and Hungary (Budapest) as more attractive tourist destinations than Poland. The most recognizable Polish cities are Warsaw, Cracow and Gdansk. The first associations with Poland are rather negative or neutral. Poland is seen as a little known, isolated and conservative country, attached to its history and tradition, although the respondents appreciate the economic development, beautiful scenery, and well-known Poles (John Paul II, Lech Walesa, Frederic Chopin, and Roman Polanski). Poland is not perceived as a typical tourist destination, however, some forms of tourism including a city break have been considered with regard to travelling to Poland (Strategia komunikacji na rynkach: brytyjskim, niemieckim i francuskim, 2010).

The analysis of the image of Poland as a tourist destination in the particular markets allow to draw detailed conclusions. According to the findings presented in the report on the effectiveness of the communications campaign promoting Poland on German, British, and French market, the respondents from all countries highlight: the beautiful scenery, monuments and places associated with history, forests, and competitive prices as Poland's advantages, but they criticize limited Internet access and poor local transport. They see Poles as hospitable, hard-working and religious people. The associations with Poland are both positive and negative. Germans associate Poland with theft and fraud, but also with the beautiful scenery and places worth visiting, including: Mazury, Tatras, and Kashubia

as well as major Polish cities. British link Poland with World War II, Nazi crimes, tradition and history. They perceive Warsaw and other Polish cities as attractive, but indicate cold and inclement weather as disincentives to arrival. French appreciate beautiful countryside and recognize famous Poles, but they also associate hard liquor and alcohol abuse with Poland (Badanie skuteczności kampanii promocyjnej Polski na rynkach zagranicznych: niemieckim, brytyjskim i francuskim, 2011, 2012).

The results of the research carried out on the Swedish and Dutch markets were published in the report on the communications strategy with regard to those markets. According to the findings, Swedes perceive Poland as an agricultural and traditional country with the excessive influence of church. Information on Poland is outdated and it is believed that the country is dull, drab and boring, however, the image of Polish cities, such as Warsaw, Cracow and Tri-City is more positive. Poles are also favorably regarded as diligent, kind, and friendly. Dutch perceptions of Poland are rather negative. They see Poland as a poorly developed, religious, corrupted, and agricultural country. Other associations include sadness, boredom, dullness and poverty. Poland is not perceived as a tourist destination and the only recognizable Polish city is Warsaw. The respondents indicate the lack of knowledge and negative associations as main obstacles to visit Poland, however, they see the opportunities for attracting foreign tourists through promoting cultural tourism, rural tourism, ecotourism, and wellness and spa centers (Strategia komunikacji marketingowej na rynkach szwedzkim i holenderskim, 2012).

Although respondents share many similar views on Poland, there are some differences in their perceptions as well as their travel habits and preferences. Poland is not perceived as a typical tourist destination while Polish cities such as Warsaw, Cracow and Gdansk, places associated with history and national parks generate interest. This means that cultural tourism and city breaks should be promoted in all surveyed countries, but other tourist products should be properly selected and adjusted to the specific characteristics of various markets and target audiences. Active recreation on the Polish coast and the lakes is the right choice for German tourists, while wellness and spa centers can attract tourists from Sweden, guest houses located in the small tourist cities should be promoted in Dutch market, and national parks and places with beautiful landscapes in France. The results of the studies confirm also the suitable selection of the concept of the communications message based on young, energetic, and cheerful people as well as happy tourists who visited Poland. However, the evaluation of the promotional activities carried out so far is unfavorable since they are hardly noticed (Johann, 2013).

METHODOLOGY

Research questions

Since the US market was considered of high importance (Polska Organizacja Turystyczna, 2011), the analysis of the US tourists' perceptions on Poland could enable to develop a suitable positioning strategy in order to differentiate the country from other tourist destinations and reach the audience through the right communication channels with the appealing message. Additionally, the analysis of the tourists' opinions on the quality of services provided during the tours and satisfaction with other tourism product attributes could provide information regarding the areas of tourists' discontent, which could be used by tour operators and other entities offering tourist services in order to improve their market offering and enhance the customer proposition.

The primary objective of the study was to analyze tourists' perceptions of Poland as a travel destination. The research tasks included the identification of the distinct associations with Poland that differentiate it from other tourist destinations and make it a unique country to travel, visit, and experience. Another important research task was gathering information on the possible ways to improve the promotional activities aimed at promoting Poland as a tourist destination. The following research questions were formulated:

1. What are the perceptions of tourism product attributes including the services provided by the tour operator as well as other destination attributes?
2. Is there a relationship between gender and tourism product evaluations, age, and tourism product evaluations, and country of residence and tourism product evaluations?
3. What are the distinct associations with Poland as a tourism destination?
4. How to improve the effectiveness of the promotional activities aimed at promoting Poland as a tourist destination?

Data collection

The researcher analyzed the secondary data such as: the reports on the Poland communications campaigns in selected markets performed on request of the Polish Tourism Organization and tourists satisfaction surveys conducted by tour operators. Then, in-depth interviews with the tourist companies' managers and individual tourists were conducted. Based on the secondary data analysis and in-

depth interviews, the researcher distinguished factors affecting the tourist' holiday experience and divided them into two groups: the attributes controlled by the tour operator and those beyond the tour operator's control:

- controllable attributes: attractiveness of the program, organization, hotels, restaurants and meals, standard of the bus, tour escort, and price/quality relationship,
- uncontrollable attributes: climate and atmosphere of the stay, tourist attractions (culture, monuments), nature (countryside and parks), shopping opportunities, safety, opportunity to meet new people, weather, cleanliness, reasonable prices, tourist information, kindness towards foreigners, possibility to communicate in English and handicapped facilities.

After selecting the attributes crucial for visitors, the questionnaire was developed including the closed-ended and open-ended questions aimed at obtaining all information regarding travelers' holiday experience. Subsequently, the questionnaires were distributed among tourists who were on the coach tours in Poland in 2013, in English version, organized by Mazurkas Travel – Polish Incoming Tour Operator. Tourists were asked questions regarding their assessments of important package holidays attributes distinguished by the researcher. Numerical evaluation of all attributes was made with the application of 1-5 Likert scale. Moreover, tourists were asked questions regarding their opinions on the attractiveness of Poland as a tourist destination comparing to other countries and promotional activities which could be used to increase the awareness of Poland as a tourist destination.

Sample characteristics

The surveyed sample of tourists spent their summer holidays in Poland on the coach tours with the program including the major cities and the most important tourists attractions. The total sample volume was 463 travelers. According to the survey results presented in Table 1, 59.8% of tourists were females and 40.2% males. 69.1% of respondents were over 60, 15.3% were within the age bracket of 51-60, 6.1% were between ages of 20-30, 5.4% between 41-50, 2.4 % between 31-40 and 1,7% were under 20. Considering the country of residence, 83.8% of tourists were from the USA, 8.7% from Canada, 4.7% from Australia, and 2.9% from other countries. Thus, the conclusions of the study are made with regard to the US, Canadian, and Australian markets.

Table 1 The Sample characteristics

Indicator			Frequency	Percent	Valid Percent	Cumulative percent
Gender	Valid	Female	185	59.8	59.8	59.8
		Male	275	40.2	40.2	100.0
		Total	460	100.0	100.0	
	Missing		3			
		Total	463			
Age	Valid	under 20	8	1.7	59.8	1.7
		21-30	28	6.1	40.2	7.8
		31-40	11	2.4	100.0	10.2
		41-50	25	5.4		15.6
		51-60	70	15.3		30.9
		over 60	317	69.1		100.0
		Total	459	100.0		
	Missing	Total	4			
Country of residence	Valid	USA	377	81.4	83.8	83.8
		Canada	39	8.4	8.7	92.4
		Australia	21	4.5	4.7	97.1
		Other	13	2.8	2.9	100.0
		Total	450	97.2	100.0	
	Missing		13	2.8		
		Total	463	100.0		

FINDINGS

The analysis of the data in this study consists of two major parts: a quantitative analysis of tourists' perceptions of Poland as a tourist destination and a qualitative analysis of the tourists' comments and opinions regarding Poland as a tourism destination.

The quantitative analysis

The quantitative analysis was carried out on the basis of the tourists' evaluations of the distinguished tourism product attributes by applying a Likert scale ranging from 1 to 5. The results of the quantitative analysis of tourists' perceptions of main tourism product attributes are presented in Table 2.

Table 2. The tourists' perceptions of main tourism product attributes

Tourism product attributes	Mean	Standard Deviation	N
Attractiveness of the program	4.69	0.509	450
Organization	4.70	0.526	451
Hotels	4.38	0.626	452
Restaurants and meals	4.48	0.680	456
Standard of the bus	4.66	0.555	459
Tour escort	4.85	0.459	455
Price/quality relationship	4.60	0.453	453
Climate, atmosphere of your stay	4.54	0.632	452
Tourist attractions	4.67	0.541	451
Nature, countryside	4.57	0.621	447
Shopping opportunities	4.01	0.867	436
Safety	4.65	0.572	446
Opportunity to meet new people	4.31	0.772	449
Weather	4.11	0.889	447
Cleanliness	4.61	0.531	453
Reasonable prices	4.58	0.565	453
Tourist information	4.43	0.651	440
Kindness towards foreigners	4.48	0.718	452
Possibility to communicate in English	4.33	0.778	448
Handicapped facilities	3.60	1.083	291

According to the survey results, the highest rated tourism product attributes controlled by the tour operator included: tour escort, organization, attractiveness of the program and standard of the bus. Meals and restaurants and hotels received lower rates, however, they were also highly evaluated. The relatively high rating of price/quality relationship is worth noting, since it shows the attractiveness of value proposition offered by the tour operator. Considering the evaluations of other package holidays attributes related to the uncontrollable external conditions, the highest ranked attributes included: tourist attractions, safety, cleanliness, beautiful nature and countryside and reasonable prices. Shopping opportunities and weather received lower rates and handicapped facilities was the lowest ranked attribute.

In order to determine whether there is a significant association between gender and tourism product attributes' evaluations, age and tourism product attributes' evaluations, and country of residence and tourism product attributes' evaluations, a chi-square test of independence was conducted. Three hypotheses were tested:

- H1: Gender and tourism product attributes' evaluations are independent.
- H2: Age and tourism product attributes' evaluations are independent.
- H3: Country of residence and tourism product attributes' evaluations are independent.

To meet the chi-square test conditions (less than 20% of cells have expected count less than 5, and the minimum expected count is more than 1) two age groups were distinguished (1 - 60 and less, and 2 - more than 60), two groups of countries (1- USA, 2 - other countries), and tourists' evaluations were classified into three groups (1 - bad and neutral, 2- good, 3 - very good).

Table 2. Chi-square test for gender and tourism product attributes' evaluations

Tourism product attributes	Value	df	Assymp. Sig (2-sided)
Attractiveness of the program	4.298	2	0.117
Organization	0.276	2	0.871
Hotels	3.003	2	0.223
Restaurants and meals	1.338	2	0.512
Standard of the bus	2.639	2	0.267
Tour escort	0.270	2	0.987
Price/quality relationship	1.192	2	0.551
Climate, atmosphere of your stay	0.996	2	0.608
Tourist attractions	4.940	2	0.085
Nature, countryside	2.947	2	0.229
Shopping opportunities	2.431	2	0.297
Safety	5.654	2	0.059
Opportunity to meet new people	3.049	2	0.218
Weather	6.716	2	0.035
Cleanliness	0.894	2	0.639
Reasonable prices	2.542	2	0.280
Tourist information	1.634	2	0.442
Kindness towards foreigners	0.575	2	0.750
Possibility to communicate in English	1.270	2	0.530
Handicapped facilities	0.040	2	0.980

Significance level at 0.05

Table 2 shows the results of the chi-square test for gender and tourism product attributes' evaluations. Since the P-value is more than the significance level (0.05) in all cases, the null hypothesis can be accepted. Thus, it is possible to make a conclusion that gender and tourism product attributes' evaluations are independent.

Table 3 shows the results of the chi-square test for age and tourism product attributes' evaluations. The P-value is less than the significance level for such product attributes as: attractiveness of program, organization, and kindness towards foreigners. The hypothesis for those attributes can be rejected. In other cases the P-value is more than the significance level, which means that for those attributes the hypothesis can be accepted. It can be concluded that age is related to the evaluations of attractiveness of program, organization, and kindness towards foreigners, and is not related to the evaluations of other tourism product attributes.

Table 3. Chi-square test for age and tourism product attributes' evaluations

Tourism product attributes	Value	df	Assymp. Sig (2-sided)
Attractiveness of the program	6.783	2	0.034
Organization	9.598	2	0.008
Hotels	5.238	2	0.075
Restaurants and meals	2.718	2	0.257
Standard of the bus	4.344	2	0.114
Tour escort	2.582	2	0.275
Price/quality relationship	4.206	2	0.122
Climate, atmosphere of your stay	3.778	2	0.151
Tourist attractions	1.254	2	0.534
Nature, countryside	0.212	2	0.899
Shopping opportunities	0.229	2	0.892
Safety	0.878	2	0.645
Opportunity to meet new people	2.500	2	0.286
Weather	2.928	2	0.231
Cleanliness	5.031	2	0.081
Reasonable prices	0.626	2	0.731
Tourist information	1.645	2	0.439
Kindness towards foreigners	30.861	2	0.000
Possibility to communicate in English	1.496	2	0.473
Handicapped facilities	4.328	2	0.115

Significance level at 0.05

Table 4. Chi-square test for country of residence and tourism product attributes' evaluations

Tourism product attributes	Value	df	Assymp. Sig (2-sided)
Attractiveness of the program	3.660	2	0.160
Organization	0.426	2	0.808
Hotels	2.178	2	0.337
Restaurants and meals	2.614	2	0.271
Standard of the bus	8.720	2	0.013
Tour escort	3.570	2	0.168
Price/quality relationship	7.568	2	0.023
Climate, atmosphere of your stay	6.937	2	0.031
Tourist attractions	3.306	2	0.191
Nature, countryside	3.453	2	0.178
Shopping opportunities	3.908	2	0.142
Safety	6.992	2	0.030
Opportunity to meet new people	14.208	2	0.001
Weather	7.188	2	0.027
Cleanliness	11.849	2	0.003
Reasonable prices	7.046	2	0.030
Tourist information	9.842	2	0.007
Kindness towards foreigners	4.066	2	0.131
Possibility to communicate in English	5.430	2	0.066
Handicapped facilities	3.827	2	0.148

Significance level at 0.05

Table 4 shows the results of the chi-square test and tourism product attributes' evaluations. The P-value is less than the significance level for such tourism product attributes as: standard of the bus, price/quality relationship, climate and atmosphere of the stay, safety, opportunity to meet new people, weather, cleanliness, reasonable prices, and tourist information. The hypothesis for those attributes can be rejected. In other cases the P-value is more than the significance level, so for other attributes the hypothesis can be accepted. Thus, it can be stated that the country of residence is related to the evaluations of standard of the bus, price/quality relationship, climate and atmosphere of the stay, safety, opportunity to meet new people, weather, cleanliness, reasonable prices, and tourist information, and is not related to the evaluations of other product attributes.

The qualitative analysis

The qualitative analysis was concerned with examining tourists' comments regarding their perceptions of Poland as a tourist destination. 406 tourists out of 463 made comments about their holiday experience. All those comments have been carefully examined in order to identify the points that differentiate Poland from other countries visited by tourists. The most frequently repeated tourists' comments regarding the attractiveness of Poland as a tourist destination are presented in Table 5.

According to the opinions of tourists, Poland is an attractive tourist destination, however, an old image of the country (communist and poor), lack of knowledge, and hardly noticed promotional activities can be main obstacles to visiting Poland. In addition, the communication campaigns aimed at promoting other European countries are more visible, so other destinations including Czech Republic (Prague) and Hungary (Budapest) appear to be more attractive. Tourists' perceptions of Poland's natural (e.g. climate, landscape), cultural (e.g. history, art) and functional (e.g. accommodations, food, transportation) resources are generally positive. Travelers appreciate beautiful countryside and cultural heritage and see them as valuable assets. Various types of landscape, natural beauty from mountains to beach resorts, pleasant climate in summer are emphasized as important elements of their holiday experience. Poland appears to be a country with a good future, fast growing economy with a proud public, and amazing post war recovery and reconstruction. Rich, interesting, individual, unique history and culture as well as change, growth and development are main points of differentiation according to many visitors.

Poland is characterized as a country with the European climate, however, it is less westernized and commercialized. In comparison to the rest of Europe, Poland is perceived as a very different, original, and unique country. Very many tourists see Poland as much cleaner and much safer than other European countries. The visitors also stress competitive prices, good exchange rate and the fact that Poland has not converted to euro yet as important advantages of coming to Poland. Moreover, they highly value the quality of tourist services provided on the tour, and appreciate delicious Polish cuisine and very tasty meals served in the restaurants. Polish people, according to the opinions of surveyed travelers, are warm, kind, hospitable, and helpful. They are also friendly to the US visitors and have a good command of English, which facilitates communication. Commitment to the Catholic Church, respect for tradition, spirit of people, determination, strength, and diligence are considered the main Polish values.

Table 5. The travelers' perceptions regarding Poland as an attractive tourist destination

What makes Poland an attractive tourist destination	% of indications
Unique, rich, interesting history	49.26
Friendly, welcoming, kind, polite people	22.17
Wonderful sites and tourist attractions	21.19
Beautiful countryside, scenery, variety of landscape	20.69
Affordability, competitive prices, good exchange rate	19.46
Culture, tradition, music, folklore	18.22
Delicious food, excellent restaurants	11.08
Cleanliness, very clean country	7.39
Polish origins, roots, family ties	7.39
Ability to communicate in English	5.91
Safety, very safe country	5.17
Economic growth, progress, development	3.94
Well-known people, scientists, writers, musicians	3.20
Good accommodation, high quality hotels	2.22
Religion, faith, devotion to catholic church	1.72
Not so touristy, not overcrowded by tourists	1.47
Nice weather, pleasant climate in summer	1.23
Shopping opportunities	1.23

The analysis of the travelers' comments regarding their perceptions of Poland as an attractive tourist destination enabled to distinguish the points that differentiate Poland from other tourist destinations. The points of differentiation, presented in Table 6, are crucial for the positioning strategy of Poland as a travel destination as well as the communication strategy aimed at creating an image of Poland as an attractive country for tourists.

Table 6. The image of Poland as a tourist destination – the points of differentiation

	Points of differentiation
History	Unique and individual history, interesting historical sites
Culture	Cultural heritage, post war recovery, reconstruction, architecture, music
Nature	Beautiful countryside, various types of landscape, scenery, forests
Economy	Fast growing economy, development, change
Religion	Religious heritage, strong religion, religion important for people
People	Friendly, kind, helpful, welcoming, able to communicate in English
Country of origin	Polish origins, roots, family ties
Food	Unique, delicious, wonderful food
Prices	Competitive prices, good exchange rate, does not have euro
Weather	Pleasant climate in summer
Famous people	Many artists, musicians, scientists originated from Poland
Cleanliness	Very clean, cleaner than other countries
Safety	Very safe, safer than other countries
Values	Tradition, hospitality, strength, spirit of people, determination, diligence
Other	European, but not so commercialized and touristy as the rest of Europe

CONCLUSIONS

Poland is not perceived as a tourist destination and traveling to Poland is not promoted sufficiently in the USA, Canada, and Australia according to the opinions of many tourists. Moreover, the limited number of companies offer tours to Poland, travel agents do not have extensive knowledge about travelling to Poland and it is hard to find information about tours to Poland. In general, people do not think of Poland as a place to visit unless they have family connections in Poland. The visitors indicate the lack of knowledge and outdated image as main obstacles to visit Poland, however, they see the opportunities for attracting foreign tourists in developing a promotional campaign aimed at creating the modern image of Poland.

The quantitative analysis of tourists' evaluations of the tourism product attributes leads to the following conclusions. The tourism product attributes including the package holiday services offered by the tour operator were highly evaluated by the tourists. Tour escort, organization, attractiveness of program, and standard of bus were the highest ranked attributes. Considering the evaluations of other tourism product attributes related to the external conditions, tourist attractions, safety, cleanliness, beautiful nature and countryside and reasonable prices were among highest rated attributes. According to the chi-square test results: gender and tourism product attributes are not related; age is related to the evaluations of attractiveness of program, organization, and kindness towards foreigners, and is not related to the evaluations of other tourism product attributes; country of residence is related

to the evaluations of standard of the bus, price/quality relationship, climate and atmosphere of the stay, safety, opportunity to meet new people, weather, cleanliness, reasonable prices, and tourist information, and is not related to the evaluations of other product attributes.

The qualitative analysis of tourists' comments regarding their holiday experience in Poland enables to draw conclusions with regard to the visitors' perceptions of Poland as a tourist destination and identify the points that differentiate Poland and make it a unique travel destination. The majority of tourists were satisfied with their visit to Poland and would recommend Poland as a tourist destination. The analyzed group of travelers appreciate the most unique, rich, and interesting history as well as historical sites, variety of tourist attractions, Polish culture and traditions. According to the opinions of many visitors Poland is a progressive country with a good future, very safe, and clean. Polish people are perceived as friendly, warm, nice, polite and able to communicate in English. The visitors highly value beautiful countryside, nature and variety of landscape. The tourist services offered in Poland are considered of high quality, especially delicious food served in the restaurants.

The communication message aimed at creating the tourist identity for Poland should be focused on the differences between Poland and the Western European destinations as well as the areas of travelers' satisfaction. According to the opinions of many tourists Poland is less commercialized and touristy than other European countries. Poland has experienced more changes than other countries and its history is unique, individual, rich and interesting. The visitors were impressed with the amazing post war recovery and the spirit, strength, and determination of people as well as their respect for tradition. Moreover, Poland is perceived as cleaner, safer, and cheaper than other European countries. Variety of tourist attractions and historical sites, cultural heritage, stability and progress, diverse landscape, friendly and welcoming attitude, common use of English, delicious and unique food should be also taken into consideration while creating the communication message addressed to the US, Canadian, and Australians visitors. The fact that many visitors are of Polish origins could be also used in the communications message as well as the opinions of satisfied tourists.

As the promotional activities aimed at developing the image of Poland as a tourist destination in the analyzed markets are hardly noticed by the travelers, it is necessary to put much more efforts in marketing communication and intensify the communication campaign. Other countries such as Israel or Turkey are much more effective in promoting their images as travel destinations. Even Prague and Budapest are much more recognized as tourist cities than Cracow. Thus, the advertising campaign on a large scale, showing the cultural heritage, change

and progress, is crucial for creating the tourist identity for Poland. Moreover, information about Poland and travelling to Poland should be published in travel magazines and travel pages of major newspapers, and presented on travel channels and Internet. It is also important to intensify the promotional activities within Polish communities including Polish clubs, organizations, churches and newspapers. The package holidays to Poland should be offered in a greater number of travel agencies and travel agents should be more aware of Poland as a tourist destination. Thus, it is necessary to undertake promotional activities to tourism product distributors through various communications tools such as study tours, visits, tourism brochures and catalogues.

Since the study was concerned with the investigation of perceptions of Poland as a tourist destination within a group of travelers coming mostly from the USA, Canada, and Australia, it would be recommended to continue the research and examine the perceptions of tourists from various countries regarding Poland as a travel destination.

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Submitted: 30th January 2014

Final version: 07th March 2014

Accepted: 28th March, 2014

Refereed anonymously