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**ANALYSIS OF REGIONAL POTENTIAL
AND PREFERENCES OF THE TARGET GROUP
TO CREATE NEW CROSS-BORDER
TOURIST PRODUCTS
IN PODKARPACKIE PROVINCE**

Summary of Report on quantitative research

Rzeszów 2018

**Summary of Report prepared under micro project no. INT/EK/PO/1/III/B/0157
entitled: "Karpackie Przygody – nowe transgraniczne produkty turystyczne"/Carpathian
Adventures – new cross-border tourist products.**

Podkarpackie province is one of the most popular tourist regions in Poland, and is especially attractive for its beautiful landscape and cultural diversity. Its strong potential and growing popularity among tourists is reflected in the fact that according to data from the Central Statistical Office (GUS), in 2017 Podkarpackie was visited by 1.226 million tourists, which is 10.4% more than in the previous year. According to registers kept by establishments offering accommodation for tourists, foreign guests accounted for 13.3% (a more than 17% increase). The most attractive areas for tourists are the southern and south-eastern parts of the province, including the Bieszczady and Beskid Niski Mountains, which are visited by 36.6% of all tourists.

This report presents the results of a survey conducted among the residents of Kraków, Warsaw and Wrocław regarding their assessment of the attractiveness of Podkarpackie province for tourists.

The survey was conducted between late October and early November 2018 in a group of 1500 adult residents of Kraków, Warsaw and Wrocław (500 persons from each city). The survey was carried out using a quantitative research method, the PAPI technique, which consists of personal interviews based on a paper questionnaire, conducted by a qualified interviewer.

The research was based on two key criteria, i.e. gender and age. The sample size was 500 respondents from each city, which, considering the size of these three cities, guarantees a 98% confidence level, with a 3% maximum error. In addition, due to the proportional distribution of the above-mentioned independent variables, gender and age, these studies provide representative results.

The survey questionnaire consisted of three thematic blocks, which concerned: the assessment of attractiveness of Podkarpackie province for tourists, the tourist's profile, created based on the characteristics of people taking part in the survey, and characteristics of the respondent's profile. The conducted analyses relied on the distributions of frequencies and comparison of mean values and percentage of answers in individual independent groups.

The group of factors which were considered in statistical and differentiating procedures included the following variables: gender, age, place of residence, level of education, occupational status, preferred type of trips, number of people in the household, living with minors in one household, and net income per person in the household.

The table below presents detailed profiles of the study groups.

Table 1. Characteristics of respondents participating in the study.

Differentiating factors		N	%
Gender	Men	696	46.4
	Women	804	53.6
Age	under 26 years	147	9.8
	27-50 years	689	45.9
	over 50 years	664	44.3
Level of education	Primary/vocational	117	7.8
	Secondary	490	32.7
	Higher	873	58.2
	No data	20	1.3
Place of residence	Kraków	500	33.3
	Wrocław	500	33.3
	Warsaw	500	33.3
Occupational activity	Yes	951	63.4
	No	544	36.3
	No data	5	0.3
Preferred type of trip	travelling alone	97	6.5
	with children/parents	304	20.3
	with another person	680	45.3
	with friends	302	20.1
	third party	79	5.3
	No data	38	2.5
Number of people in household	1 person	264	17.6
	2 persons	460	30.7
	3 persons	218	14.5
	4 persons	177	11.8
	5 and more persons	77	5.1
	No data	304	20.3
Persons under age of 18 in household	Yes	374	24.9
	No	1091	72.7
	No data	35	2.3
Net income per person in household	under 2000 PLN	385	25.7
	2001-3000 PLN	625	41.7
	3001-4000 PLN	252	16.8
	over 4000 PLN	181	12.1
	No data	57	3.8
Total		1500	100,0

Source: authors' own analysis based on the research of the attractiveness of Podkarpackie for tourists.

The following key conclusions on the attractiveness of Podkarpackie province for tourists were drawn from the conducted analyses:

1. In the area regarding the assessment of the attractiveness of Podkarpackie for tourists:
 - Almost four out of ten respondents decided to go on a holiday trip in Poland in 2018. 22.7% of respondents spent their holiday abroad, and one out of nine respondents spent their holiday both in Poland and abroad. Another 27.1% of respondents declared that they did not go anywhere on holiday in 2018.
 - Most respondents who spent their holiday in Poland went to Pomorskie province (160 answers). 120 respondents visited Małopolskie province, and 81 visited Podkarpackie province. It should be noted that respondents in this survey were residents of Kraków, Warsaw and Wrocław.
 - More than a half of respondents (54.7%) declared that they had visited Podkarpackie for tourism. Almost one out of five respondents visited Podkarpackie province for reasons other than tourism. More than 25% of respondents declared that they had never visited Podkarpackie province.
 - The attractiveness of Podkarpackie province for tourists was scored at 7.32 points on a 1 to 10 scale. Compared with neighbouring provinces, Świętokrzyskie and Lubelskie, Podkarpackie has the most interesting offer for tourists. It is slightly less attractive compared to Małopolskie, but on a 1 to 5 scale it was still scored in the upper part of the scale (3.02 points).
 - More than seven out of ten respondents were able to give at least one example of a tourist attraction in Podkarpackie province. These attractions were assigned to local administrative units (counties, including county towns), which resulted in the multiplication of data; for example the Bieszczady Mountains were assigned to Lesko county and Bieszczady county; the Beskids to Krosno, Jasło, Bieszczady, Sanok and Lesko counties, and the rivers San and Wisłok to all the counties they run through. With this approach it was possible to identify administrative units with the greatest number of attractions. In this respect the greatest number of attractions (752) were found for Lesko county, followed by Bieszczady county (606 attractions), Łańcut county (185), Rzeszów city (165), Sanok county (149) and Przemyśl city (143 attractions).
 - Most respondents would visit Podkarpackie province because of its pristine nature (75.7% answers). A slightly lower number of respondents were potentially interested in historic towns and buildings (42.9%), traditional cuisine (29.4%), interesting thematic trails (26.4%) and unique art and culture (24.3%).

2. In the area regarding the tourist's profile:
 - Considering different types of tourism, the highest percentage of respondents were interested in leisure (4.08 points on a 1 to 5 scale). A slightly lower mean score was found for sightseeing (4.05), followed by active tourism (3.82), cultural tourism (3.79) and nature tourism (3.66 points).
 - Almost six out of ten respondents usually travel by car during their trips. A preference for travel by train was declared by 17% of respondents, and travel by coach by 16.2% of respondents. Another 6.8% of respondents prefer travelling by plane.
 - As with the preferred type of accommodation, most tourists declared farm cottages/private lodging (28.2%). Almost 25% of respondents prefer guest houses or hotels. Another 15.8% of respondents travelling for tourism prefer staying in hostels, and 6.4% prefer camping sites.
 - More than six out of ten respondents declared summer as their favourite season for trips. 17.1% of respondents prefer travelling in autumn, and 16.2% opt for spring. 5.6% of respondents usually have their trips for recreation in winter.
 - More than half of respondents (53.9%) go for trips a few times per year. 9.5% of respondents travel more than once a year, and 36.6% of respondents have one trip per year.
 - Almost half of respondents usually go for longer trips, e.g. holidays (48.9% answers) or weekends (45.6% of answers). Other respondents (5.5%) prefer one-day trips.
 - The decisions of respondents related to trips are usually inspired by the recommendations of their friends (66.4%) and information from the Internet (65.3%).

3. In the area regarding target groups of the project "Carpathian Adventures – new cross-border tourist products":
 - Persons under the age of 26 years equally often spend their holiday in Poland and abroad. In 2018 most young residents of Kraków, Wrocław and Warsaw spent their holiday in Małopolskie, Pomorskie and Dolnośląskie provinces. At the time of the survey more than one third of them declared that they had never been to Podkarpacie. They would visit this region mainly for its pristine nature. Compared to other age groups, respondents under the age of 26 more frequently indicated attractions of Podkarpackie province such as: the opportunity to spend time actively, the turbulent history of the region, the opportunity to relax, a good place for shopping, and a venue for business meetings. On a scale of 1 to 10, these respondents scored the attractiveness of Podkarpackie province for tourists at 7.06 (the lowest score considering all age groups). Respondents aged under 26 are mainly interested in active tourism, sightseeing and leisure. Most of them travel by car. As with other means of transport, they chose travel by train significantly more often than other age groups. Most of the youngest respondents chose accommodation at hotels, hostels and guest houses. They chose camping sites significantly more often compared to other age groups. Although they decide to go on holiday trips mainly in the summer, they prefer spring trips more often than respondents from other age groups. They



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go away a few times a year, usually for weekend trips, and get inspiration to travel primarily from information on the Internet and the recommendations of friends.

- Most residents of Kraków, Wrocław and Warsaw aged 27-50 years spend their holiday in Poland. In 2018 they spent their holiday in Pomorskie, Małopolskie or Podkarpackie provinces. Almost half of them have visited Podkarpacie at least once. They are mainly attracted to this region because of its pristine nature, traditional cuisine and historic towns. The latter attraction was indicated significantly more often by respondents from this age group compared to others. On a 1 to 10 scale, these respondents scored the attractiveness of Podkarpackie province for tourists at 7.20. This age group is mainly interested in leisure, active tourism and sightseeing. Most of them prefer travelling by car and chose accommodation at farm cottages/guest houses and hotels. They go on trips mainly in the summer, several times a year, and usually on weekends. They get inspiration for trips from the Internet and recommendations by their friends.
- Respondents aged over 50 years are the least mobile when it comes to tourism. More than 30% of them did not go on holiday in 2018. Most of those who decided to go on a trip chose destinations in Poland. In 2018 most of them spent their holiday in Pomorskie, Małopolskie or Podkarpackie provinces. More than six out of ten respondents from this age group have visited Podkarpacie at least once. They are mainly attracted to this region because of its pristine nature, historic towns, and places of religious worship. The latter attraction was indicated significantly more often by respondents from this age group compared to others. On a 1 to 10 scale, these respondents scored the attractiveness of Podkarpackie province for tourists at 7.50 (the highest score considering all age groups). Respondents from this group are mainly interested in leisure, sightseeing and cultural tourism. Most of them prefer travelling by car. As with other means of transport, they chose travel by coach significantly more often than other age groups. Guest houses and farm cottages are equally popular accommodation among them. Although they decide to go on holiday trips mainly in the summer, they prefer autumn trips more often than respondents from other age groups. They go away once or a few times a year, usually for longer trips, and get inspiration for travel primarily from friends and information on the Internet.
- Another target group of the project comprised families with children. Almost half of them spent their last holiday in Poland. In 2018 most of them spent their holiday in Pomorskie, Małopolskie or Podkarpackie provinces. More than 50% of these respondents have visited Podkarpacie at least once. They are mainly attracted to this region because of its pristine nature, historic towns, and traditional cuisine. On a 1 to 10 scale these respondents scored the attractiveness of Podkarpackie province for tourists at 7.32 (the same as the mean for the whole surveyed group). This target group is mainly interested in leisure, active tourism and sightseeing. Most of them prefer travelling by car. Farm cottages, guest houses and hotels are equally popular accommodation among them. Families with children go on trips mainly in the summer. They also go on trips several times a year, usually for longer time, e.g. holidays. They get inspiration for trips from the Internet and recommendations from friends.

Document properties

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