Target Groups of Baltic Sea Heritage Tourism

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1. Executive Summary

Desk Research of Flash Eurobarometer

In order to deliver a sound basis for marketing purposes, the data of Flash Eurobarometer 291 was re-analysed with the following results for the Baltic Sea Region:

EU 27-citizens with interest in BSR 2010

- Volume: 59.02 mn EU 27-citizens aged 15 and older (13.6%).
- Travel propensity: 76% (short trips: 49%, holiday trips 63%)
- Germany and Poland cover ¾ of the overall interest in the BSR.
- BSR prospectives have an average travel propensity and frequency.
- Prospective customers 2010 who did not travel in 2009 mention financial and private reasons first.
- Main motivation of holidaymakers: More than a third of the persons with BSR-Interest 2010 want to relax.
- Environment and cultural heritage are the most important attractions with influence on choice of destination.
- Main Source markets of people with BSR interest 2010 are Germany and Poland.
- Heritage tourism in BSR can be defined in four ways:
    - main motivation 'nature'
    - main motivation 'culture'
    - major influence of 'environment'
    - major influence of 'cultural heritage'

59.02 mn prospective BSR-visitors

Four potential target groups

BSR-prospectives with major influence of 'environment' and 'cultural heritage'

- Volume: 13.34 mn EU 27-citizens with BSR interest 2010 & 'cultural heritage" and 26.97 mn EU 27-citizens with BSR interest 2010 & 'environment'
- Travel propensity: 75% vs. 76%
- Most important motivations are rest and recreation.
- Main transport method in both target groups is car/motorbike.
- Prospective BSR-customers influenced by culture or environment are individualists.
- Most or second most important are recommendations of friends and colleagues respectively the internet.
- Preference of traditional, well-known destinations in both target groups.
- Local culture is more important for prospective customers who were influenced by the motive cultural heritage.
- Easy abdicable for both target groups: Beauty and Shopping
- Vacation plans of both segments are very similar.
- Germany, Poland and Sweden are the favourite destinations.
- Sociodemographic aspects:
    - No sex differences in the influence of cultural heritage or environment on destination choice.

'environment'

&

'cultural heritage'

- Particularly the elderly are influenced by cultural heritage.
- Prospective customers live in rural zones and other urban centres.
- Share of retired is big.

- Main source regions are Germany and Poland.

BSR-prospectives with major motivation 'nature' and 'culture'

'nature'

&

'culture'

- Travel propensity: 100% (per definition), no short trip: 44% vs. 41%
- Volume: 3.25 mn EU 27-citizens with BSR interest in 2010 & main motivation 'culture/religion' and 6,67 mn EU 27-citizens with BSR interest in 2010 & main motivation 'nature'
- Nature vacationists use car/motorbike very often; culture vacationists show no clear preference.
- Nature vacationists organise themselves, culture vacationists book also through a travel agency.
- Most or second most important are recommendations of friends and colleagues respectively the internet.
- Environment and cultural heritage with biggest influence on choice of destination.
- Preference of traditional, well-known destinations in both target groups.
- Non-traditional, emerging destination should have local culture, lifestyle and traditions.
- Easy abdicable: Beauty and Shopping.
- Most nature vacationists are planning longer holidays; culture vacationists often prefer a combination of long and shorter trips.
- Germany, Poland and Sweden are the favourite destinations.
- Sociodemographic aspects:
  - Culture is rather in the focus of women.
  - Emphasis of prospective BSR-customers on the elderly.
  - Prospective customers live in rural zones and other urban centres.
  - Amount of retired is big.
- Main source region is Germany, followed by Poland and Sweden.

Conclusions

Nature of more interest than culture

- BSR prospectives show a broad interest for Heritage tourism.
- Market volume of nature is bigger than culture.
- Interest in BSR is a big domestic market.
- Suppliers should focus on the two biggest target groups: 'environment' and 'cultural heritage'.
- Profiles deliver the prerequisite for addressing the prospective BSR-heritage tourists successfully.

2. Background and aim of this paper

AGORA 2.0 is part of the Baltic Sea Region Programme 2007-2013. The rationale for the project is that the countries in the Baltic Sea Region have a long common history throughout the centuries and a great variety of natural and cultural resources. However, the area is still not well recognised as one common region outside its formal borders.

Objective:

Improvement of common identity of Baltic Sea Region

Therefore, the project aims to improve the common identity of the Baltic Sea Region, based on its rich natural and cultural treasures. Heritage assets – used in a sustainable way – are not only interesting tourist attractions, but also relevant preconditions to enhance the business environment.

Target group analysis for Baltic Heritage Tourism

Hence, the aim of this paper is to carry out a target group analysis for the Baltic Sea Region and its heritage assets, i.e. the natural and cultural heritage of the region. This target group analysis should in turn provide useful information for tourism suppliers in the Baltic Sea Region for successfully marketing their products.

Output: Profiles as a basis for marketing

In order to develop profiles of the relevant target groups that can easily be adopted for marketing purposes, the following questions shall be answered:

Research questions

- Which regions within the BSR are most interesting for EU 27-citizens? Who shows interest in the BSR? What motivations do they have and which attractions have most influence on their choice of destination?
- Which target groups for BSR Heritage tourism can be defined? How big are the target groups for BSR Heritage Tourism?
- Are there any differences between nature and culture-orientated BSR-prospectives? How did these people travel in the past? What holiday plans do they have for the following year? Which information sources do they use? Do they prefer traditional or emerging destinations? How can they be described socio-demographically? Where do they come from?

Basis: existing data

The following analysis had to be carried out with existing information; this means that no additional surveys have been carried out on behalf of this study.

3. Methodological aspects of the underlying study

Basis: Flash Eurobarometer

The basis for this study is the Flash Eurobarometer nº291 "Survey on the Attitudes of Europeans towards tourism in 2010", which is based on more than 30.000 face-to-face and telephone interviews. The survey was conducted for the European Commission by The Gallup Organisation, Hungary in 2010 and is representative for 483.88 mn Europeans resp. 421.57 mn inhabitants of the EU 27 aged 15 and older.

Methodology: Desk research

The existing data was re-analysed with focus on respondents who planned to spend their main holiday 2010 in the Baltic Sea Region (BSR).

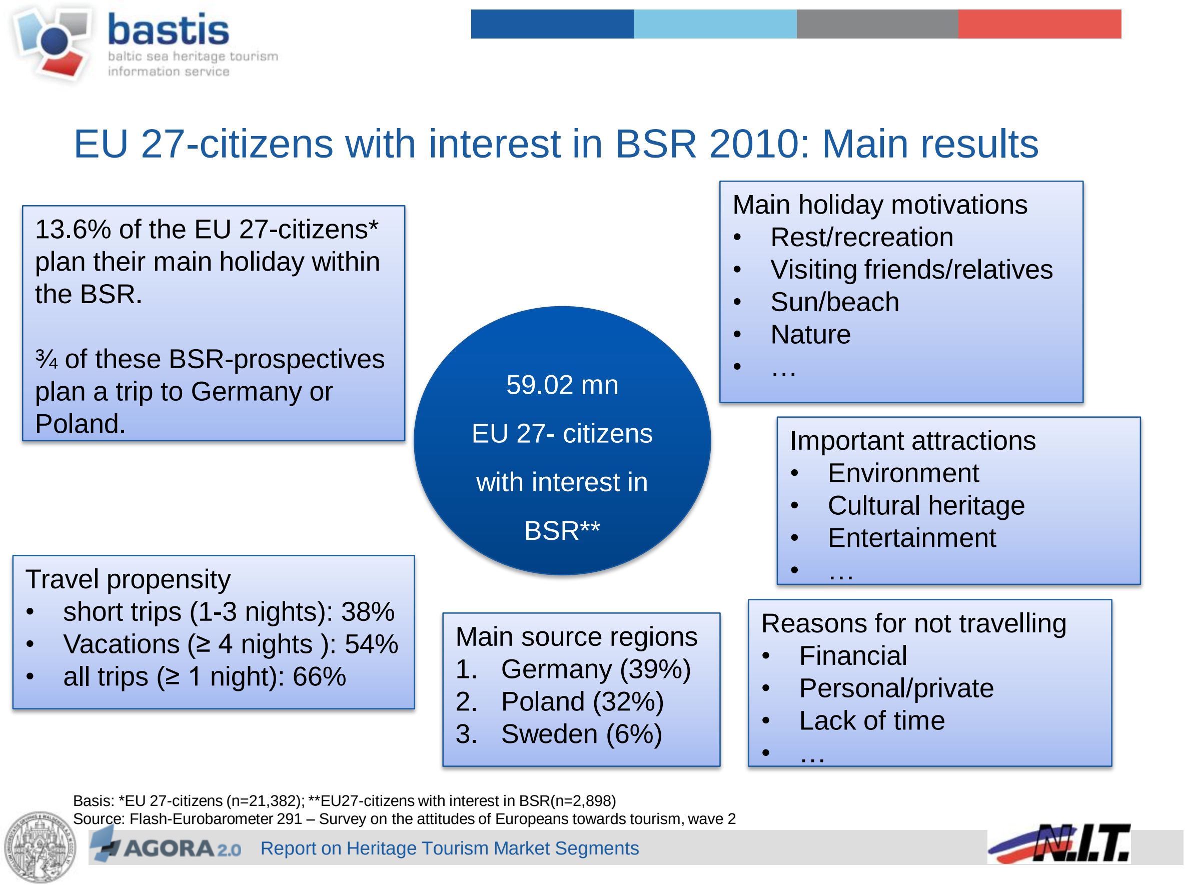
"Survey on the Attitudes of Europeans towards Tourism in 2010" (Flash Eurobarometer No 291)

For whom?	The study was conducted for the European Commission, Enterprise and Industry Directorate General – New Approach Industries, Tourism & CSR by The Gallup Organisation, Hungary.
What method?	Telephone & face-to-face interviews
Where?	Interviews were predominantly carried out by telephone. However, due to the low fixed-line telephone coverage in Bulgaria, the Czech Republic, Estonia, Latvia, Lithuania, Hungary, Poland, Romania and Slovakia, face-to-face interviews were also conducted in those countries (700 telephone and 300 face-to-face interviews). Note: Flash Eurobarometer surveys systematically include mobile phones in samples in Austria, Finland, Italy, Portugal and Spain.
When?	Telephone interviews were conducted in each country between the 05/02/2010 and the 09/02/2010.
Sample sizes?	In most European countries the target sample size was 1,000 respondents, but in Germany the sample size was 2,000 interviews, 1,500 interviews in Spain, France, Italy, Poland, United Kingdom, and 500 interviews in Estonia, Cyprus, Latvia, Lithuania, Luxembourg, Malta, Slovenia, Croatia, Norway, Iceland, the former Yugoslav Republic of Macedonia.
Representativeness?	Total n=30,138 interviews, weighted on EU27 n=27,115 interviews A weighting factor was applied to the national results in order to compute a marginal total where each country contributes to the European Union result in proportion to its population. Each national sample is representative for the population aged 15 years and above.

Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

4. EU 27-citizens with interest in BSR 2010

4.1. Main results

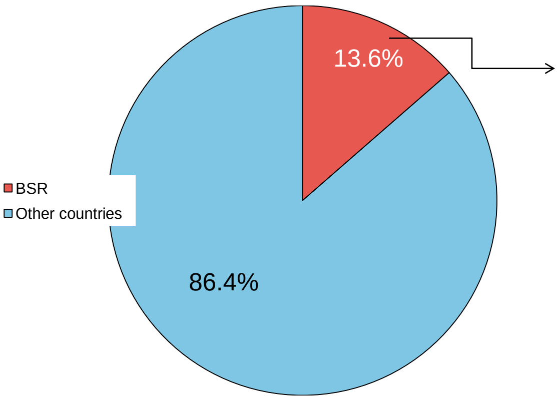


4.2. Interest in the Baltic Sea Region

13.6% (59.02 mn) of the EU 27-citizens aged 15 and older planned their main holiday trip 2010 within the Baltic Sea Region (BSR). 23.61 mn were planning a holiday in Germany and 18.97 mn wanted to travel to Poland in 2010. There is a huge gap between these two outstanding destinations and Sweden, Finland and Denmark who follow on rank 3 to 5. Lithuania, Russia, Latvia and Estonia are rather seldom named.

59,02 mn BSR-prospectives

Planned destinations of Europeans for main holiday 2010



Country	Share
Germany	5.6%
Poland	4.5%
Sweden	1.2%
Finland	0.7%
Denmark	0.6%
Lithuania	0.4%
Russia	0.3%
Latvia	0.2%
Estonia	0.2%

Indicated are %; Caused by roundings the sum ist not always 100%.
Question Q15: „Where do you plan to spend your main holiday in 2010?“ (only one answer possible)
Basis: EU27-citizens (n=21,382)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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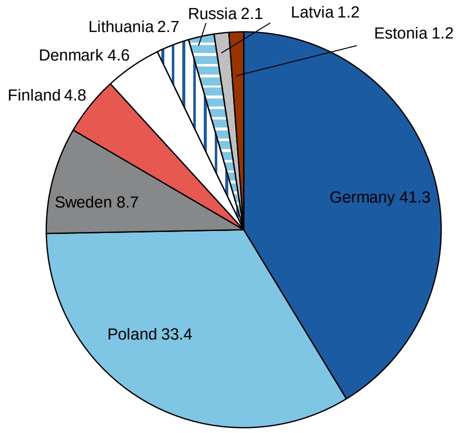
13,6% of EU 27-citizens plan to spend their main holiday in the BSR

Taking all BSR-interests as a basis, it is easily seen that Germany and Poland cover ¾ of the overall interest in the whole region.

Planned destinations of main holiday trip by Europeans with interest in BSR



Indicated are %
Question Q15: „Where do you plan to spend your main holiday in 2010?“ (only one answer possible)
Basis: EU27-citizens with interest in BSR(n=2,898)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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Germany and Poland ranked on top – all other destinations far behind

4.3. Travel propensity and frequency in 2009

In 2009, 65% of the EU 27-citizens spent at least one vacation in paid accommodation. 11% made only short private trips with less than four nights, 27% made only holiday trips with four or more nights and 27% did both. Summed up, this leads to a short trip travel propensity of 38% and to a holiday trip propensity of 54%.

BSR-prospectives have a high travel propensity

The travel propensity and frequency of EU 27-citizens with interest in the BSR 2010 is higher than the above mentioned (short trips: 49%, holiday trips 63%, all trips: 76%).

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Travel propensity of EU27-citizens resp. with interest in BSR 2010

	EU 27 citizens			EU27-citizens with interest in BSR 2010		
	Both - Short private and holiday trips	Only short private trips (< 4 nights)	Only holiday trips* (≥ 4 nights)	Both - Short private and holiday trips	Only short private trips (< 4 nights)	Only holiday trips* (≥ 4 nights)
Travel propensity	27%	11%	27%	36%	13%	27%

Indicated are % and means
*In paid accommodation
Question Q2: „And how many of these were private trips, where you stayed away for less than four nights?"/Question Q3: „How many times did you go on a holiday in 2009, where you either stayed in paid accommodation/or in your second home for a minimum of four nights?"
Basis: EU 27-citizens (n=18,863); EU27-citizens with interest in BSR (n=2,898)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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Number of short private and/or holiday trips

	EU 27 citizens			EU27-citizens with interest in BSR 2010		
	Short private and/or holiday trips	Short private trips (< 4 nights)	Holiday trips* (≥ 4 nights)	Short private and/or holiday trips	Short private trips (< 4 nights)	Holiday trips* (≥ 4 nights)
1 time	27	34	48	27	34	50
2 times	21	25	27	19	27	27
3 times	16	13	12	18	12	12
4-5 times	17	11	8	19	12	8
6-10 times	10	8	3	9	8	2
10+	6	7	1	7	6	1
DK/NA	2	2	1	1	1	-

Indicated are % and means; *In paid accommodation
Question Q2: „And how many of these were private trips, where you stayed away for less than four nights?"/Question Q3: „How many times did you go on a holiday in 2009, where you either stayed in paid accommodation/or in your second home for a minimum of four nights?"
Basis: respondents who made at least one short private and/or holiday trip in 2009, one short private trip resp. one holiday trip; Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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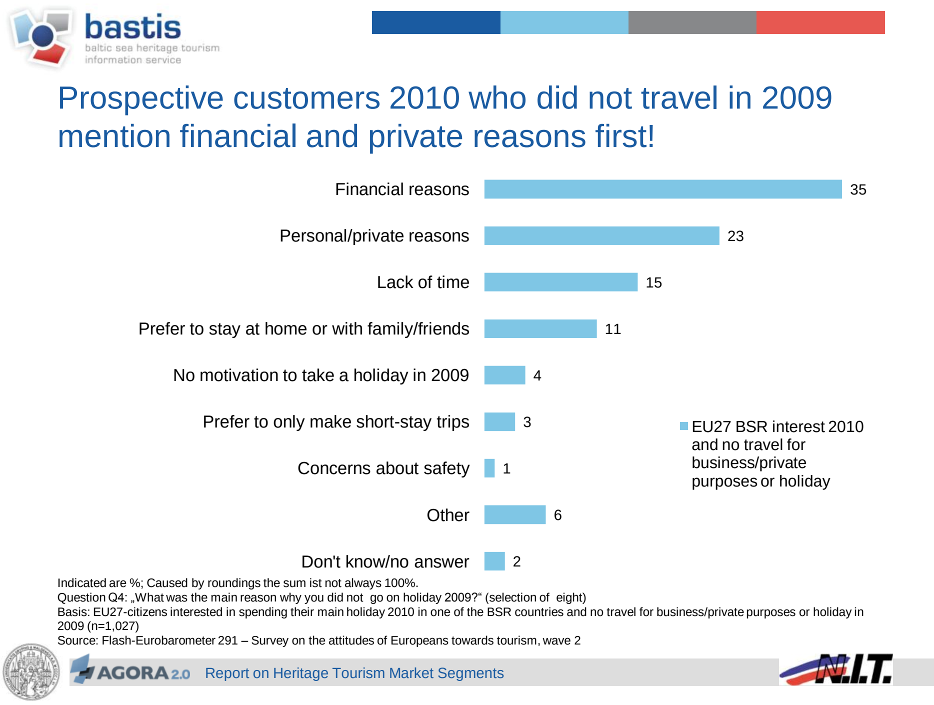
4.4. Reasons for not going on holiday in 2009

In order to find out, why 35% of the BSR-interests 2010 did not travel in 2009, they were asked why they didn't. It becomes obvious that financial and private reasons are mentioned first (35% resp. 23%). In addition, there are some respondents who named a lack of time (15%) or that they preferred to stay at home or with family/friends (11%).

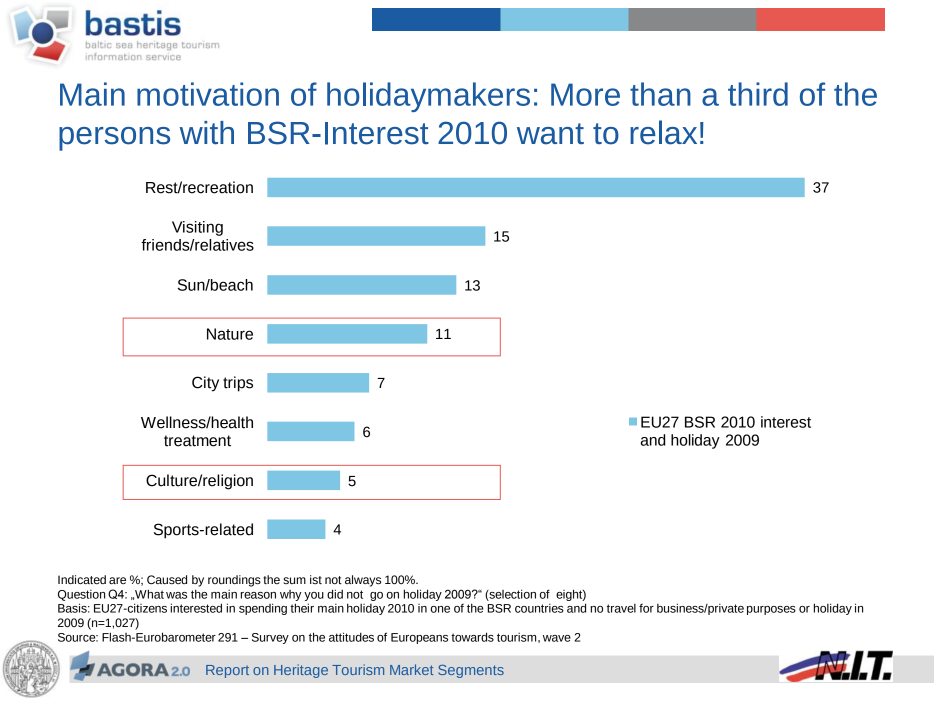


Not travelling has predominantly financial reasons

4.5. Choosing a holiday destination

4.5.1. Major holiday motivations

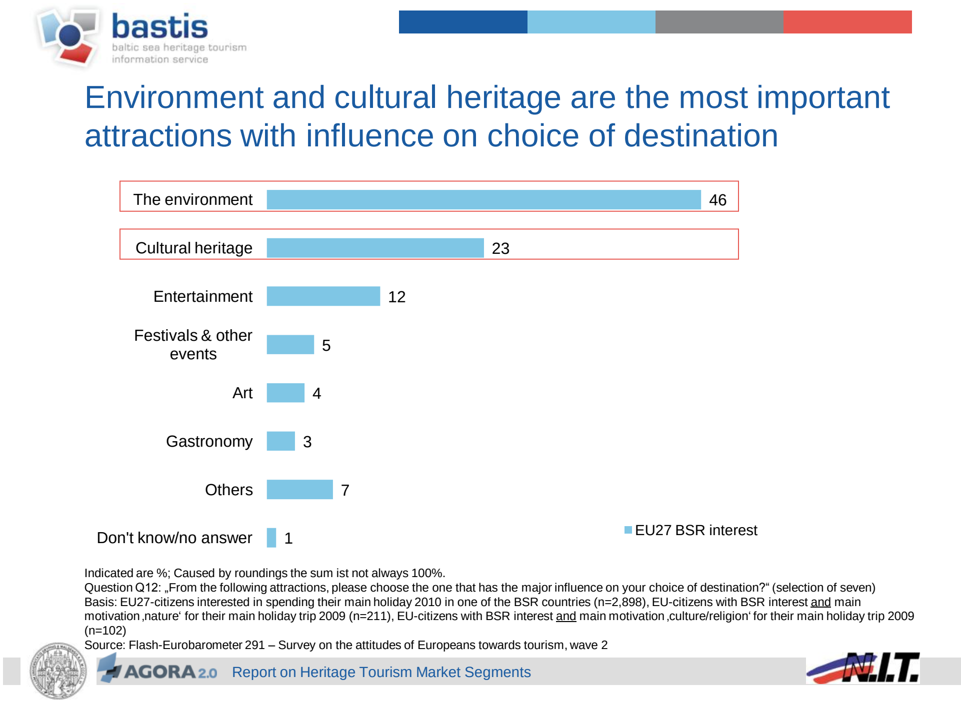
Why do people with BSR-interest travel? What motivations do they have? On their main holiday trip, most of them simply wanted to relax, but visiting friends and sun & beach were important motives as well. Nature was the main motive for 11% of the respondents with BSR-interest, culture/religion for 5%. We will have a closer look on these two target groups in chapter 3.



Rest and recreation is the most important motivation

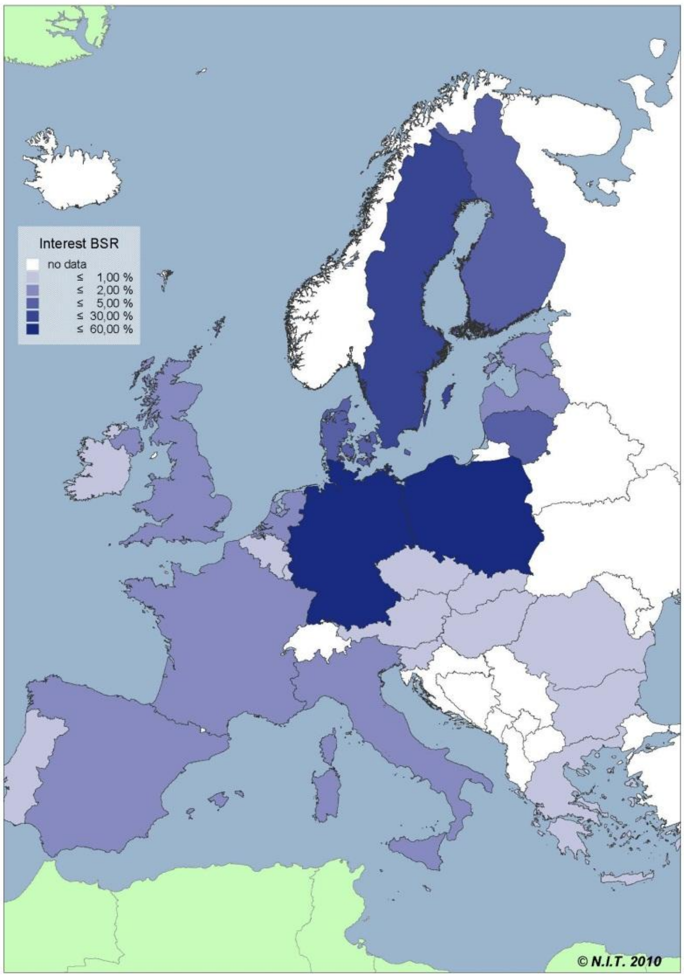
4.5.2. *Attractions with influence on choice of destination*

The choice of a destination is influenced by motives, but also by local and regional attractions. The analysis of EU 27-BSR-interests shows that environmental and cultural heritage are the most important attractions.



Environment and cultural heritage are the most important attractions

4.6. Source regions



Most people who are interested in the BSR live in Germany (39%) or Poland (32%). Sweden, Lithuania, Denmark and Finland are following with a maximum market share of 6%. This means, that the main source regions are identically with the preferred destinations in the BSR.

Some additional prospective travellers live in Western Europe (the Netherlands, United Kingdom, Italy, Spain, and France) and in the Baltic countries Latvia and Estonia. All other EU27-countries have shares of less than 1% each.

Main source regions: Germany and Poland

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Source regions of people with BSR interest 2010: Main Source markets are Germany and Poland

In %	Population	BSR interest
1. Germany	17.0	39.2
2. Poland	7.7	32.2
3. Sweden	1.8	6.0
4. Finland	1.0	4.6
5. Lithuania	0.7	2.8
6. Denmark	1.1	2.4
7. Netherlands	3.2	1.7
8. United Kingdom	12.0	1.7
9. Italy	12.2	1.5
10. Latvia	0.5	1.4
11. Spain	9.1	1.3
12. France	12.4	1.2
13. Estonia	0.3	1.1
14. Austria	1.7	0.6

In %	Population	BSR interest
15. Belgium	2.1	0.6
16. Greece	2.3	0.5
17. Portugal	2.1	0.3
18. Czech Republik	2.1	0.2
19. Romania	4.4	0.2
20. Hungary	2.0	0.2
21. Ireland	0.8	0.1
22. Bulgaria	1.6	0.1
23. Luxembourg	0.1	0.0
24. Malta	0.1	0.0
25. Slovenia	0.4	0.0
26. Cyprus	0.2	0.0
27. Slovakia	1.1	0.0

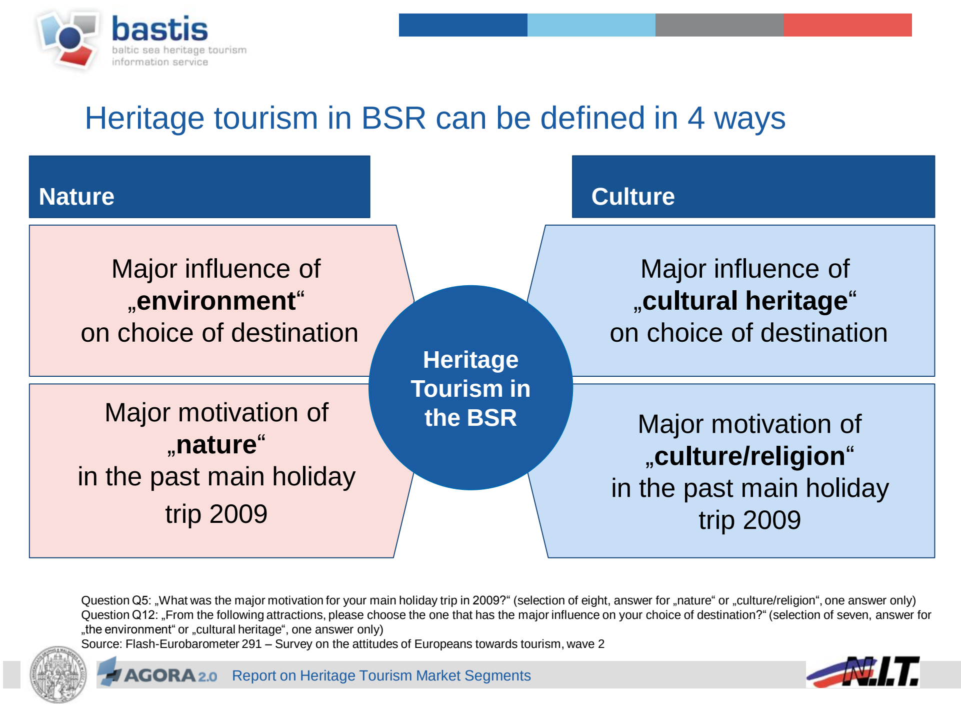
Indicated are %
Basis: EU27-citizens (n = 21,382); EU27-citizens interested in spending their main holiday 2010 in one of the BSR countries (n = 2,898)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

5. Definition of potential target groups for BSR Heritage Tourism

In order to deliver important information for marketing activities for BSR Heritage Tourism, the main target groups shall now be identified and analysed.

Definition based on motivations or attractions

Using the data of Flash Eurobarometer, there are different ways of defining target groups for Heritage Tourism in the BSR. Two target groups refer to the **attraction** with major influence on the choice of the destination in general (environment resp. cultural heritage), the other two focus on the major **motivation** in the past main holiday trip (nature resp. culture/religion).



Attractions:

- **Environment**
- **Cultural heritage**

Motives:

- **Nature**
- **Culture/ religion**

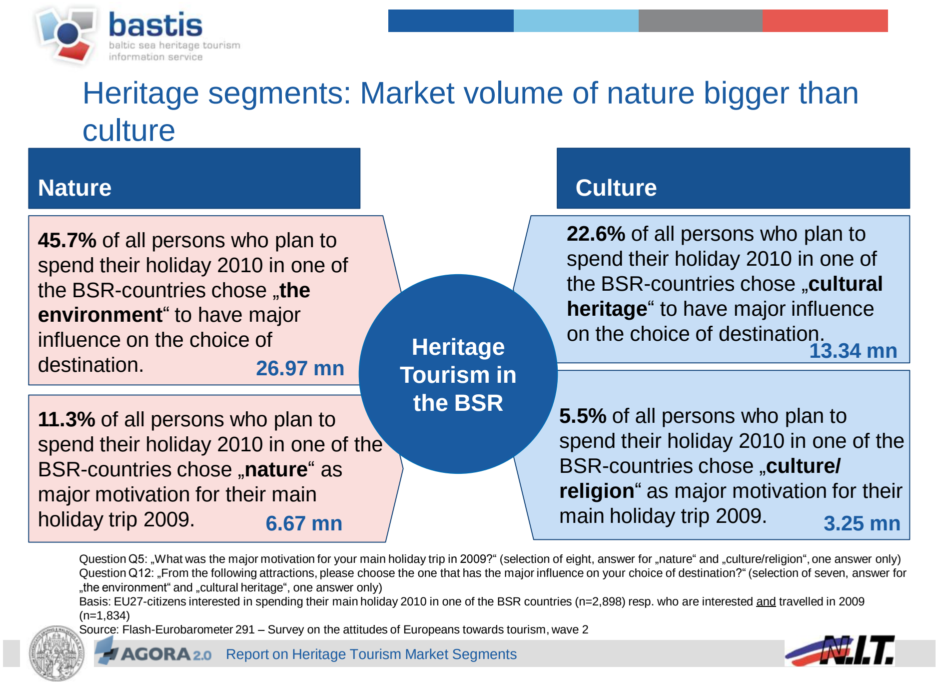
45.7%, that means almost every second prospective BSR-visitor, says that the environment has major influence on the choice of destination. At the same time, almost every fourth person with BSR-interest (22.6%) chose cultural heritage as major influence on choice of destination.

”Nature” was the major motivation for their main holiday 2009 for one out of nine respondents with BSR-interest (11.3%), while only one out of twenty (5.5%) says that “culture/religion” was the major motivation.

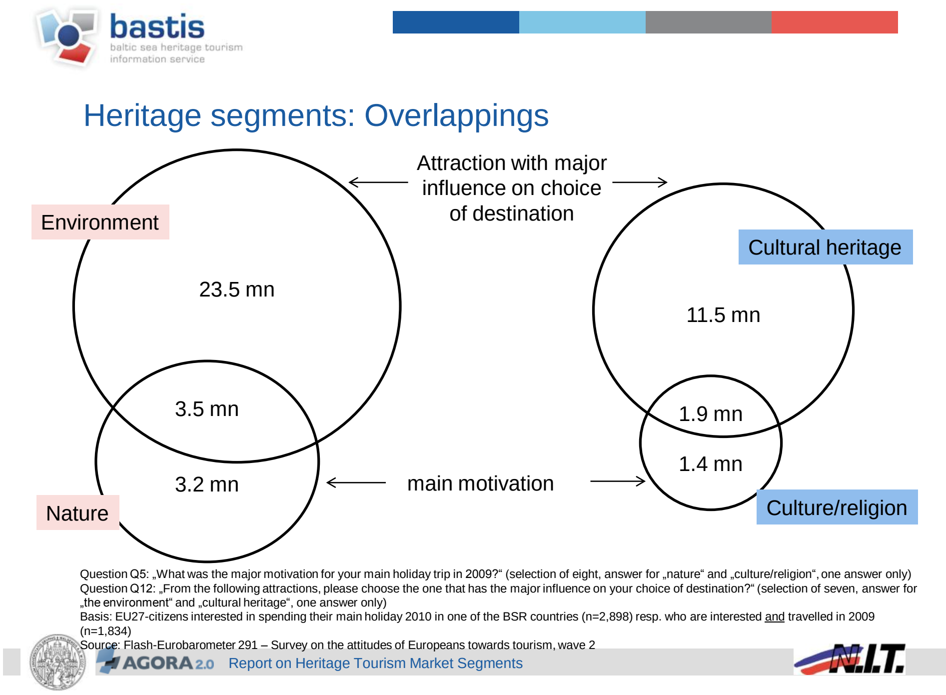
More EU 27-citizens interested in nature than in culture

Summed up, 76% of all BSR-prospectives belong to at least one of the four above mentioned target groups, 10% belong to two segments (the segments are partly overlapping, but not congruent). Although the definitions of BSR Heritage Tourism obviously lead to different results respectively to a different basis for further analyses, they agree on one important fact: The market volume for nature is bigger than for culture.

First, we will compare the two target groups which are based on major attractions; afterwards we will have a closer look at the other two groups.



Almost every second BSR-prospective considers the environment to have major influence



The four heritage segments are partly overlapping, but not congruent

6. BSR-prospectives with major influence of ‘environment’ and ‘cultural heritage’

This chapter gives a detailed description of two further target groups for BSR Heritage Tourism:

- 13.34 mn EU-27-citizens with BSR interest 2010 and major influence of “cultural heritage” on destination choice.
- 26.97 mn EU-27-citizens with BSR interest 2010 and major influence of “environment” on destination choice.

Both groups are analysed concerning touristic and sociodemographic aspects.

6.1. Target group profiles

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BSR interest and 'cultural heritage': Main results

Means of transport
- Car/motorbike 49% (Ø: 59%)
- Airplane 22% (18%)
- Train 13% (10%)
- Bus 13% (9%)
- Boat 3% (2%)
- …

Main holiday motivations
- Rest/recreation 29% (37%)
- Visiting friends/relativs 15% (15%)
- Culture/religion 14% (5%)
- Nature 13% (11%)
- City trips 12% (4%)
- …

Holiday plans
- Longer holidays favoured
- Germany, Sweden and Poland are most attractive BSR-destinations for main holiday

Information sources
- Recommendations 63% (62%)
- Internet 45% (48%)
- Personal experience 26% (31%)
- Travel/tourist agencies 18% (14%)
- Guidebooks/magazines 15% (13%)
- Catalogues/brochures 15% (15%)
- Media 12% (11%)

13.34 mn BSR interest and 'cultural heritage'

Traditional vs. emerging destinations
- 54% prefer traditional, well-known destinations (58%)
- 43% mainly expect local culture, lifestyle and tradition from emerging destinations (32%)

Sociodemographic aspects
- 53% female (52%), 47% male (48%)
- 50% (39%) older than 50 years
- 36% retired (27%), 26% emplyoees (30%) and 7% students (11%)

Reasons for not travelling
- Financial 31% (35%)
- Personal/private 20% (23%)
- Lack of time 15% (15%)
- Prefer to stay at home/with familiy/friends 10% (11%)
- …

Main source regions
1. Germany 36%
2. Poland 26%
3. Sweden 7%
4. Denmark 5%
5. Finland 5%

86% live in the BSR (90%)

* Ø for EU 27-citizens with BSR interest

Basis: EU 27-citizens with BSR interest and ‚cultural heritage' with major influence on the choice of destination (n= 654 resp. 415)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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BSR interest and 'environment': Main results

Main holiday motivations
- Rest/recreation 44% (37%)
- Visiting friends/relativs 16% (15%)
- Nature 13% (11%)
- Sun/beach 11% (13%)
- …

Holiday plans
- Longer holidays favoured
- Germany, Poland and Sweden are most attractive destinations for main holiday

Means of transport
- Car/motorbike 67% (59%)
- Airplane 13% (Ø*: 18%)
- Train 10% (10%)
- Bus 7% (9%)
- Boat 2% (2%)
- …

Traditional vs. emerging destinations
- 61% prefer traditional, well-known destinations (58%)
- 31% mainly expect local culture, lifestyle and tradition from emerging destinations (32%)

Information sources
- Recommendations 59% (62%)
- Internet 46% (48%)
- Personal experience 35% (31%)
- Guidebooks/magazines 16% (13%)
- Catalogues/brochures 15% (15%)
- Travel/tourist agencies 13% (14%)
- Media 11% (11%)

26.97 mn BSR interest and 'environment'

Sociodemographic aspects
- 53% female (52%), 47% male (48%)
- Only 17% aged 15-30 years (24%)
- 30% retired (27%), 29% emplyoees (30%) and 7% students (11%)

Reasons for not travelling
- Financial 35% (35%)
- Personal/private 28% (23%)
- Lack of time 15% (15%)
- Prefer to stay at home/with familiy/friends 10% (11%)
- …

Main source regions
1. Germany 50%
2. Poland 31%
3. Sweden 5%
4. Finland 4%

96% live in the BSR (90%)

* Ø for EU 27-citizens with BSR interest

Basis: EU 27-citizens with BSR interest and ‚environment' with major influence on the choice of destination (n= 1,324 resp. 845)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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6.2. Travel propensity and frequency in 2009

The travel propensity and frequency of both target groups is nearly the same: 75% of prospective BSR-travellers with major influence of cultural heritage and 76% of prospective BSR-travellers with major influence of environment have spent at least one short or long vacation in paid accommodation in 2009.

63% of both target groups made at least one longer holiday (4 and more nights), 49% resp. 47% of the people in these target groups made (additional) short trips with less than four nights.

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Travel propensity of EU27-citizens and major influence of ‚cultural heritage' / ‚environment' for destination choice

	EU27-citizens with interest in BSR 2010 and ‚cultural heritage'			EU27-citizens with interest in BSR 2010 and ‚environment'		
	Both - Short private and holiday trips	Only short private trips (< 4 nights)	Only holiday trips* (≥ 4 nights)	Both - Short private and holiday trips	Only short private trips (< 4 nights)	Only holiday trips* (≥ 4 nights)
Travel propensity	37%	12%	26%	34%	13%	29%

No significant differences concerning travel propensity and frequency

Indicated are % and means
*In paid accommodation
Question Q2: „And how many of these were private trips, where you stayed away for less than four nights?"/Question Q3: „How many times did you go on a holiday in 2009, where you either stayed in paid accommodation/or in your second home for a minimum of four nights?"
Basis: EU 27-citizens with BSR interest and ‚cultural heritage' with major influence on the choice of destination (n= 654 resp. 415); EU 27-citizens with BSR interest and ‚environment' with major influence on the choice of destination (n= 1,324 resp. 845)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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Number of short private and/or holiday trips of target groups

	EU27-citizens with interest in BSR 2010 and ‚cultural heritage'			EU27-citizens with interest in BSR 2010 and ‚environment'		
	Short private and/or holiday trips	Short private trips (< 4 nights)	Holiday trips* (≥ 4 nights)	Short private and holiday trips	Short private trips (< 4 nights)	Holiday trips* (≥ 4 nights)
1 time	23	34	47	29	33	52
2 times	22	24	30	19	29	28
3 times	17	12	13	17	15	11
4-5 times	19	17	6	20	9	6
6-10 times	14	9	3	8	8	2
10+	4	2	1	6	6	1
DK/NA	1	2	-	1	-	-

Indicated are % and means; *In paid accommodation
Question Q2: „And how many of these were private trips, where you stayed away for less than four nights?"/Question Q3: „How many times did you go on a holiday in 2009, where you either stayed in paid accommodation/or in your second home for a minimum of four nights?"
Basis: respondents who made at least one short private and/or holiday trip in 2009, one short private trip resp. one holiday trip; ; Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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6.3. Characteristics of main holiday trip 2009

6.3.1. Major holiday motivations

How well do the major influence of attractions in general and the major motivation for a specific holiday (here: main holiday 2009) fit together?

Although the choice of destination of the two analysed market segments is mainly influenced by the cultural heritage or the environment, the major motivation for the main holiday of both target groups was recreation (29% resp. 44%).

Other important motivations were friends/relatives, nature, sun/beach (pre-dominantly named by environmentalists), culture/religion and city trips (both mainly named by BSR-prospectives influenced by the cultural heritage).

Most vacationists simply want to relax!

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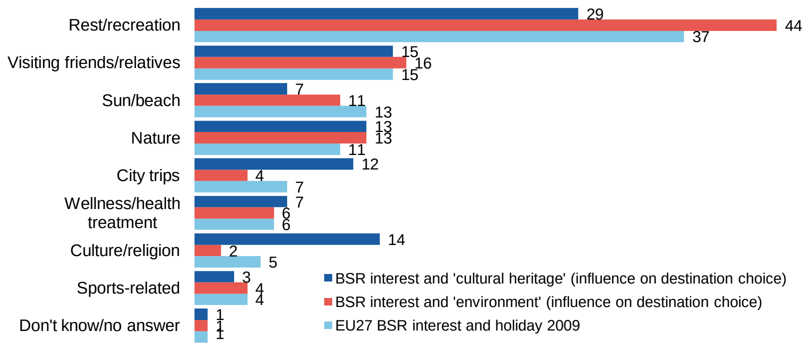
Most important are rest and recreation!



Indicated are %; Caused by roundings the sum ist not always 100%.
Question Q5: „What was the major motivation for your main holiday trip 2009? (choose one)“ (selection of eight)
Basis: EU27-citizens interested in spending their main holiday 2010 in one of the BSR countries and travelled in 2009 (n=1,834); EU-citizens with BSR interest and ‚environment' with major influence on the choice of destination (n=845), EU-citizens with BSR interest and ‚cultural heritage' with major influence on the choice of destination (n=415)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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6.3.2. *Means of transport*

Almost every second BSR prospective influenced by the cultural heritage has used the car/motorbike for the main holiday 2009. This means, that the car is comparably seldom used by this target group. Instead, quite many (22%) took the plane, and also train and bus have relatively high market shares of 13% each.

Obviously, the amount of car-users among BSR-customers who are influenced by the environment is above-average: 67% used this mean of transport, only 13% went by train, 10% by train and 7% by bus.

High percentage of car users among environment-lovers

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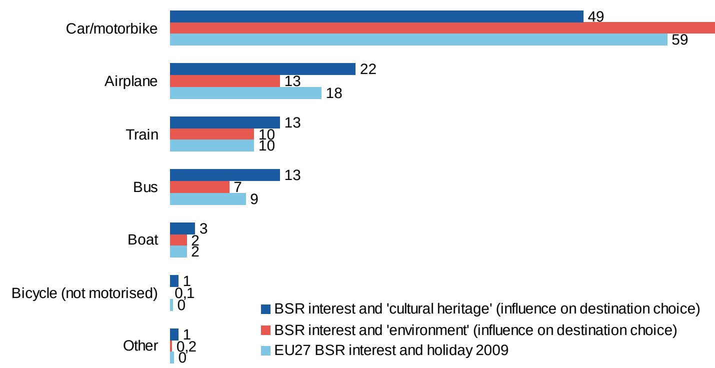
Main transport method in all target groups is car/motorbike



Indicated are %; Caused by roundings the sum ist not always 100%.
Question Q6: „How did you travel there in 2009? (what was the main method of transport?)“ (selection of seven)
Basis: EU27-citizens interested in spending their main holiday 2010 in one of the BSR countries and travelled in 2009 (n=1,834); EU-citizens with BSR interest and ‚environment' with major influence on the choice of destination (n=845), EU-citizens with BSR interest and ‚cultural heritage' with major influence on the choice of destination (n=415)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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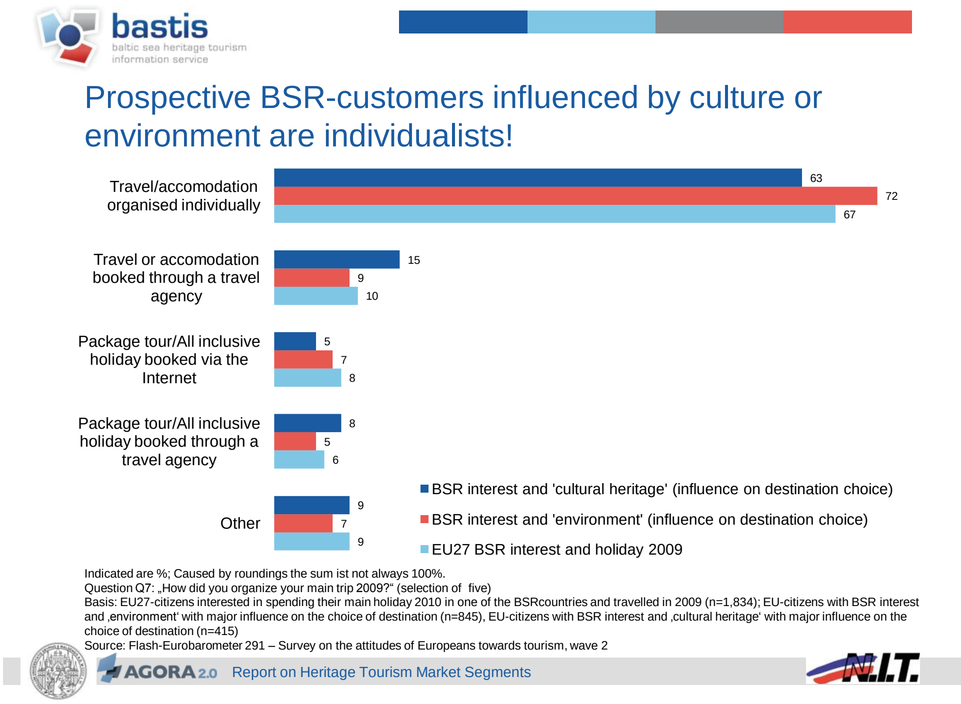
6.3.3. *Travel organisation*

Individual travel organisation is favoured by most prospective BSR-travellers - those influenced by environment to a higher degree (72%) than those influenced by culture (63%). Instead, the last named group has more often used the service of a travel agency: 15% booked their travel or accommodation and 8% a package tour or All inclusive holidays through a travel agency.

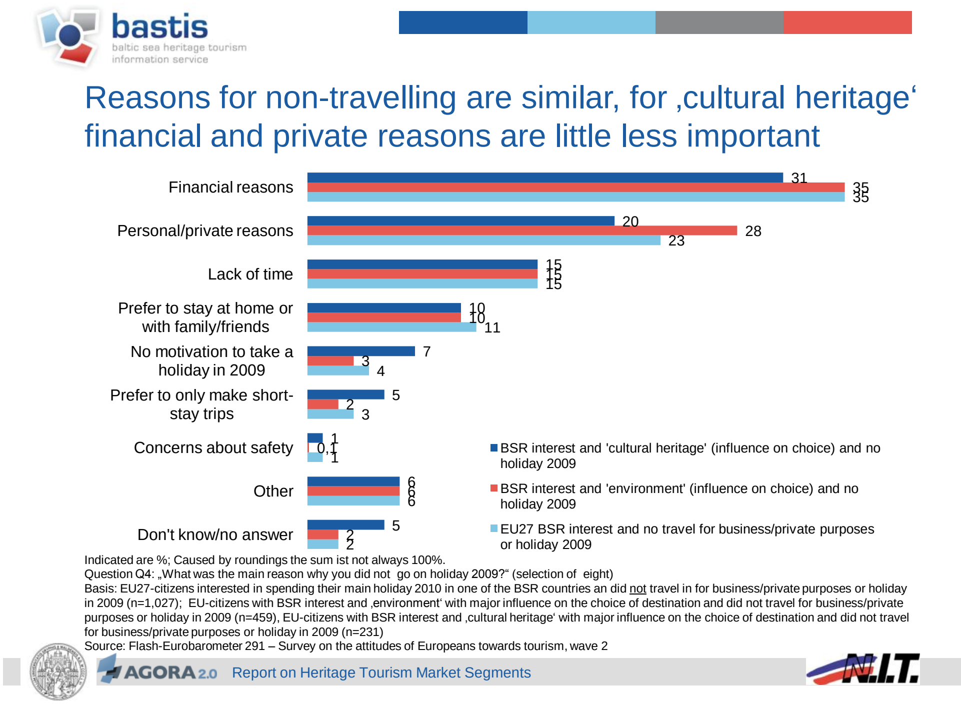


The majority prefers individual holiday organisation

6.4. Reasons for not going on holiday in 2009

In order to find out, why they did not go on holiday in 2009, the non-travellers among the BSR-prospectives where asked about their reasons for not travelling the last year.

The analysis shows that BSR-prospectives with major influence of cultural heritage stated, that this was mainly due to financial reasons (31%), personal/private reasons (20%) or because of a lack of time (15%). Mainly environmentally influenced BSR-prospectives emphasize the relevance of financial reasons (35%), personal/private reasons (28%), but also the lack of time (15%).



Financial and personal reasons on top

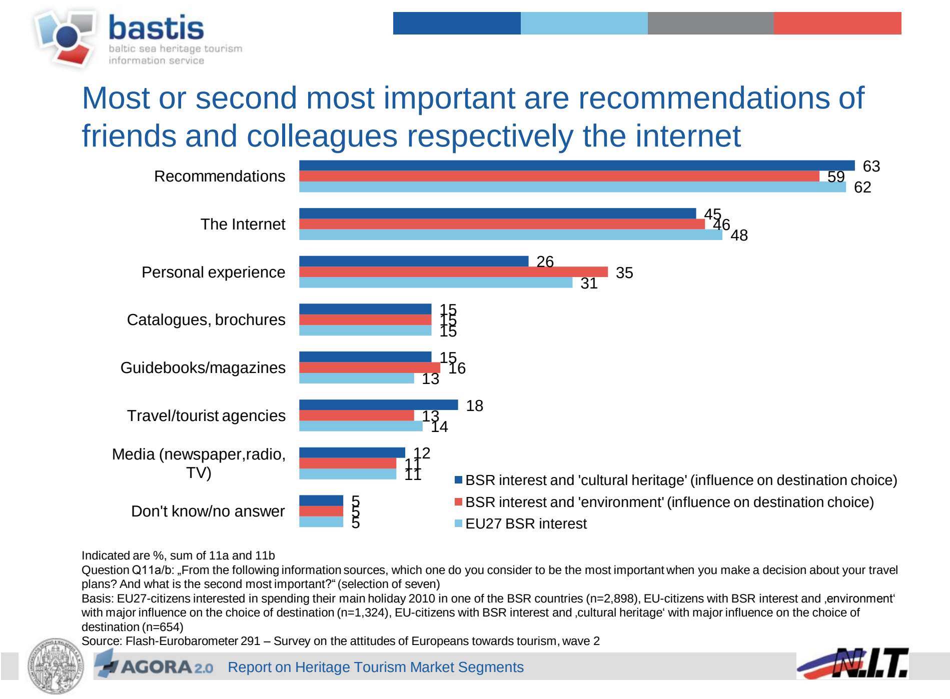
6.5. Considerations when planning a holiday and choosing a destination

6.5.1. Information sources

Although the Internet has become very important, are recommendations of friends and colleagues still the No. 1 information source. 63% of the prospective travellers with major influence of cultural heritage and 59% of environmentally influenced vacationists consider recommendations to be the most important information source.

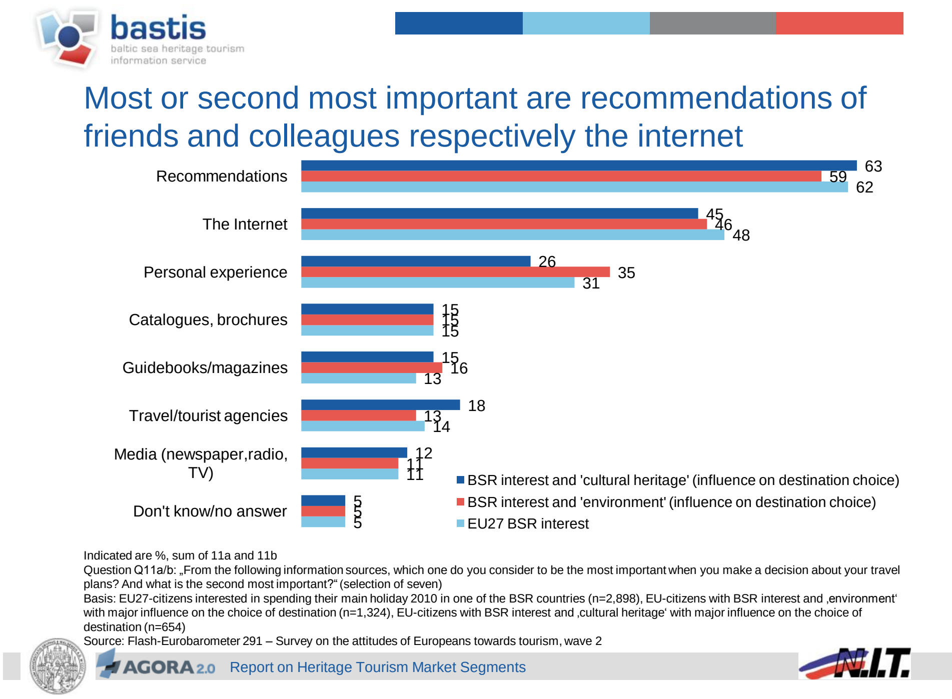
Another interesting result: When making a decision about their travel plans, 35% off the BSR prospectives with high interest in the environment trust on personal experience. Other information sources (catalogues/brochures, guidebooks/magazines, travel agencies and media) are only used by few travellers.

Recommendations and the internet are the most important information sources



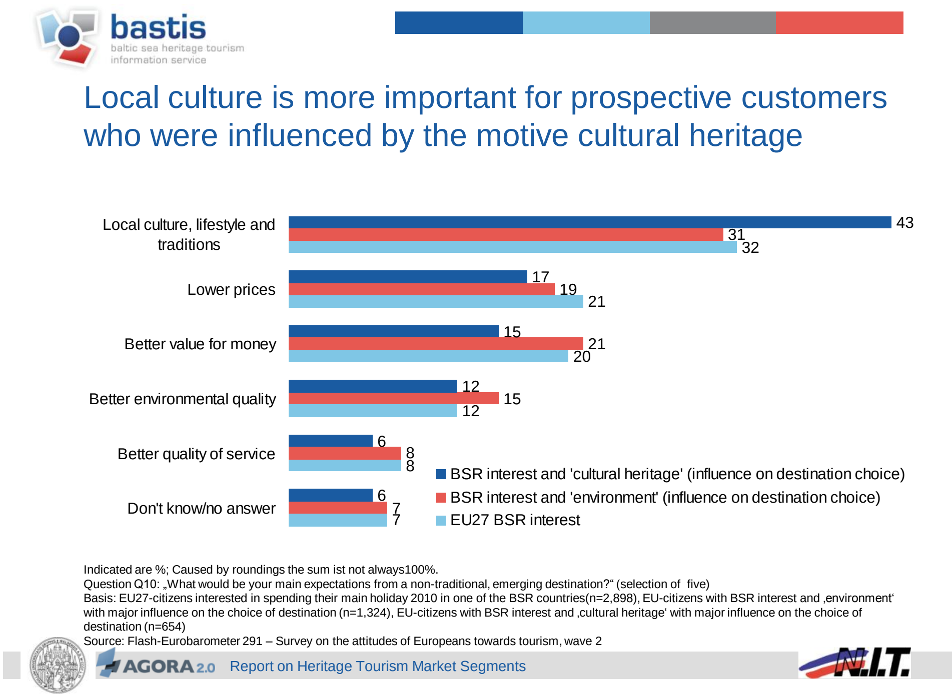
6.5.2. *Traditional vs. non-traditional destinations*

Traditional, well-known destinations are favoured in both target groups, but it is obvious that BSR-prospectives with major influence of culture heritage show bigger interest in non-traditional, emerging destinations than environmentally interested BSR-prospectives. Every tenth respondent has no preferences concerning traditional or non-traditional destinations – it`s just not important form them.



At least every second vacationist prefers traditional destinations

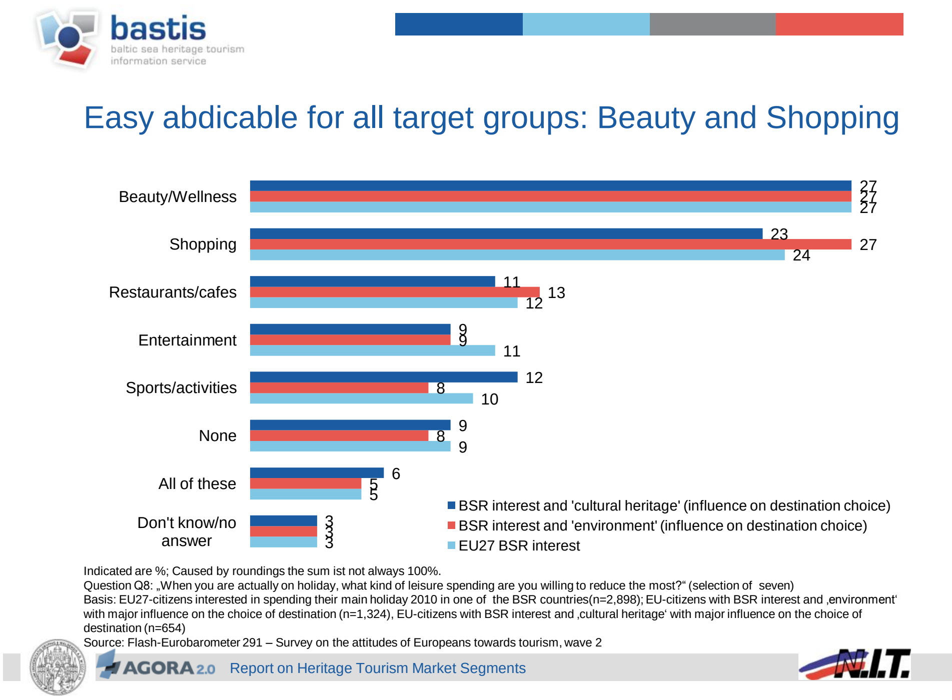
43% of the respondents, who are mainly influenced by cultural heritage, would first of all expect local culture, lifestyle and traditions from an emerging destination. Other important factors are lower prices (17%) and a better value for money (15%). Almost one third of BSR-prospectives with major influence of environment on their destination choice expect local culture, lifestyle and traditions from an emerging destination, while 21% expect better value for money, 19% lower prices and 15% a better environmental quality.



Local culture, lifestyle and traditions expected in emerging destinations

6.5.3. *Abdicable leisure spendings*

Being on holiday, both market segments could most easily do with reduced spendings on beauty/wellness (27% each) or shopping (BSR interest and cultural heritage 23%, BSR interest and environment 27%). Spending less money in restaurants/cafés, for entertainment or for sports/activities is a possibility for round about 10% of each group. Also interesting: Some respondents are not willing to reduce their spendings on any of the named areas.



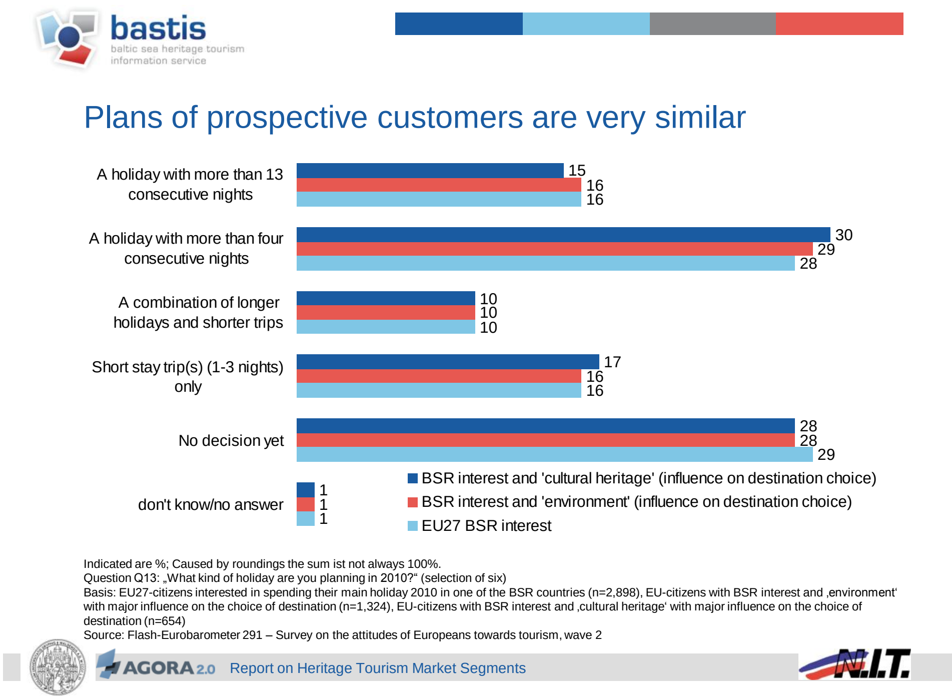
Beauty/wellness and shopping can most easily be reduced

6.6. Vacation plans for 2010

6.6.1. Types of vacation

When it comes to different types of vacation, there are almost no differences between BSR prospectives with major interest in cultural heritage resp. environment. Both groups favour holidays with more than four consecutive nights: 30% resp. 29% plan a holiday with more than four (and less than 14) nights, 15% resp. 16% want to stay on holiday two weeks or longer, and 17% resp. 16% would prefer a combination of longer holidays and shorter trips.

28% of the respondents of both segments had not made a decision about the kind of holidays he/she would make that year.

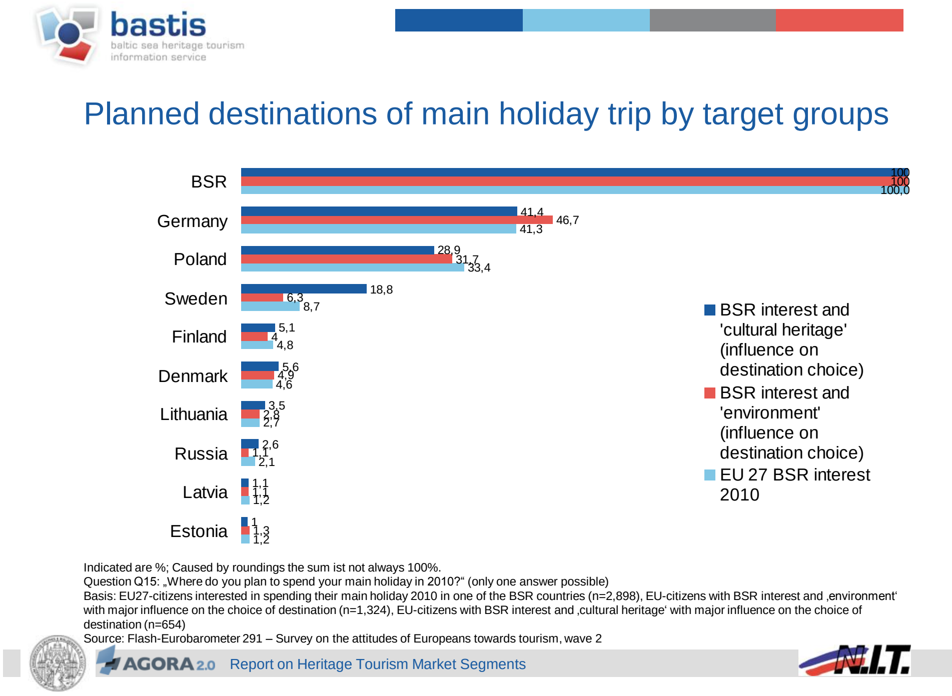


Longer holidays favoured by both groups

6.6.2. Planned destinations

Most prospective BSR-travellers with major influence of cultural heritage are planning their main holiday in Germany (41%), Poland (29%) or Sweden (19%). Denmark (6%) and Finland (5%) can here be found on prospective rank 4 and 5.

Germany is the top destination for environment-lovers as well. Almost every second respondent (46%) of this group named Germany as planned destination for his main holiday in 2010. But Poland has many fans as well and reaches 32%. Behind them, there is a huge gap, and then, there are Sweden (6%), Denmark (5%) and Finland (4%).



Germany and Poland are very much in front in both target groups

Sweden is very attractive for cultural heritage-seekers

6.7. Sociodemographic description

Typical <u>cultural heritage</u> vacationist:

Above 50 years, retired

<u>BSR interest and major influence of cultural heritage on choice of destination:</u>
This market segment has an almost equal share of women and men, 50% are older than 50 years (all respondents with BSR-interest: 39%), but only 16% are aged 15-30 years (compared to 24%). They live less seldom in urban centres than other BSR prospectives and most of them are retired.

Typical <u>environment</u> vacationist is hard to grip

<u>BSR interest and major influence of environment on choice of destination:</u>
Almost equal share of women and men, few young people (only 17% 15-30 years), average distribution of living areas and current occupations.

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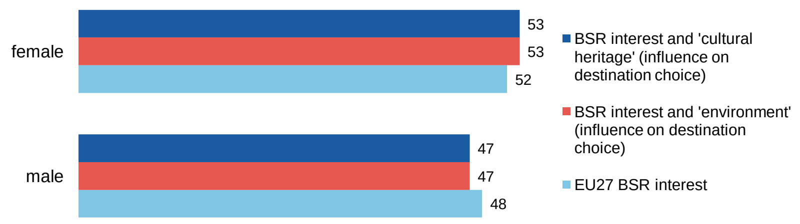
No sex differences in the influence of cultural heritage or environment on destination choice

Sex



Indicated are %; Caused by roundings the sum ist not always 100%.
Basis: EU27-citizens interested in spending their main holiday 2010 in one of the BSR countries (n=2,898), EU-citizens with BSR interest and ‚environment' with major influence on the choice of destination (n=1,324), EU-citizens with BSR interest and ‚cultural heritage' with major influence on the choice of destination (n=654)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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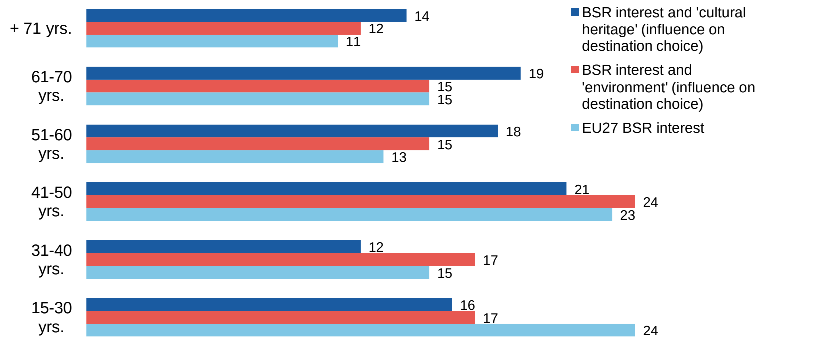
Particulary the elderly are influenced by cultural heritage



Age

Indicated are %; Caused by roundings the sum ist not always 100%.
Basis: EU27-citizens interested in spending their main holiday 2010 in one of the BSR countries (n=2,898), EU-citizens with BSR interest and ‚environment' with major influence on the choice of destination (n=1,324), EU-citizens with BSR interest and ‚cultural heritage' with major influence on the choice of destination (n=654)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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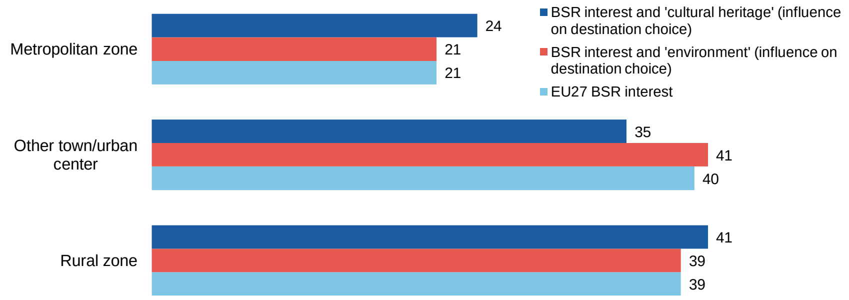
Prospective customers live in rural zones and other urban centers



Place of living

Indicated are %; Caused by roundings the sum ist not always 100%.
Basis: EU27-citizens interested in spending their main holiday 2010 in one of the BSR countries (n=2,898), EU-citizens with BSR interest and ‚environment' with major influence on the choice of destination (n=1,324), EU-citizens with BSR interest and ‚cultural heritage' with major influence on the choice of destination (n=654)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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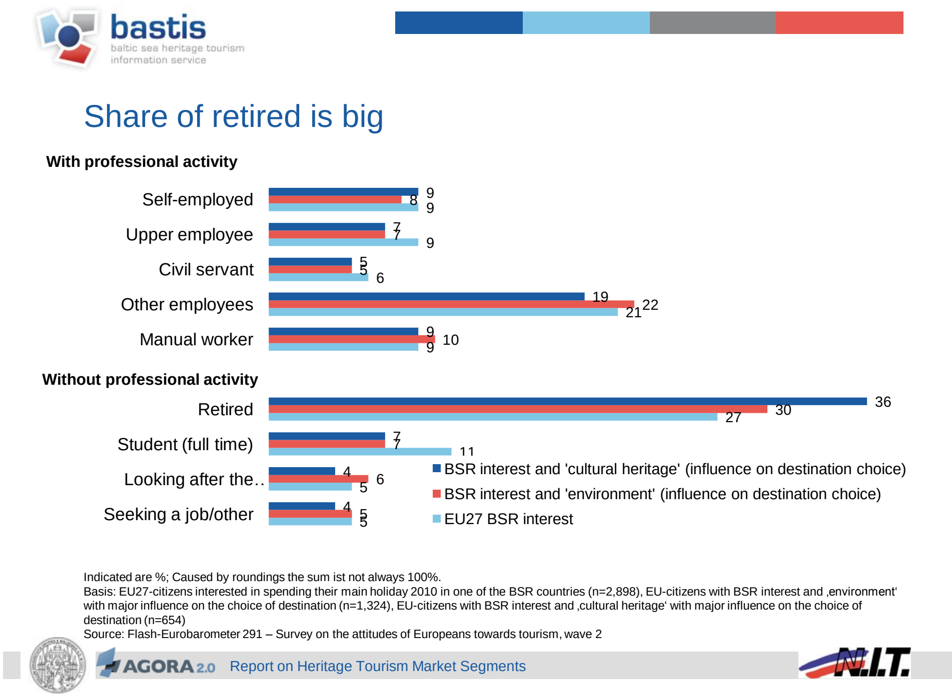
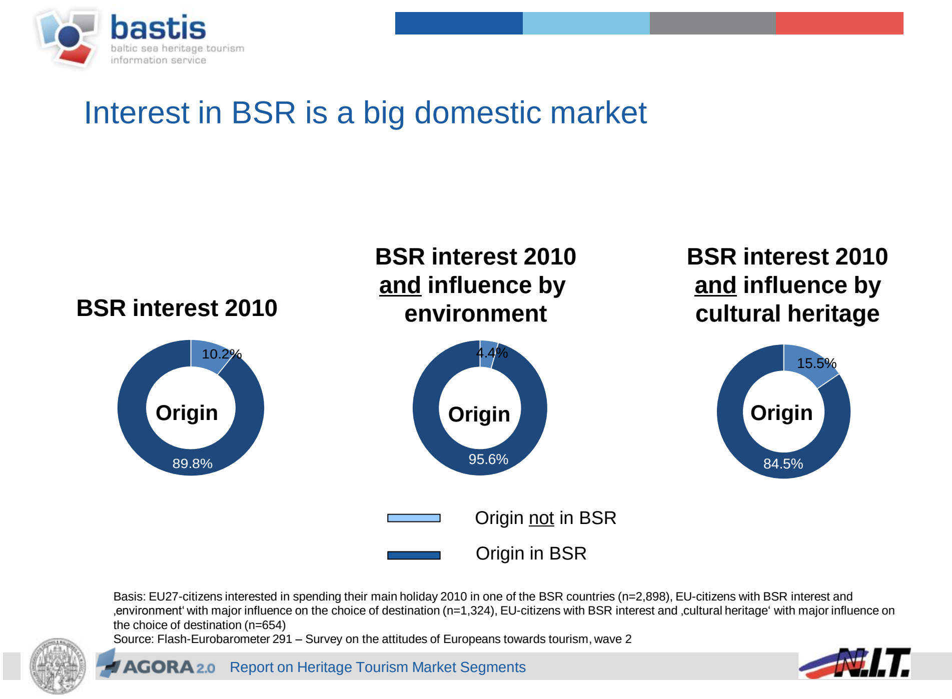


Profession

6.8. Source regions

The share of prospective BSR-visitors who live outside the BSR is only 10%. Compared to this, it seems quite a lot, if 15.5% of all respondents who show interest in the BSR and are mainly influenced by cultural heritage have their origin not in the BSR. A big difference compared to those BSR-prospectives who are mainly influenced by the environment: Only 5% of them don`t live in one of the countries belonging to the BSR.

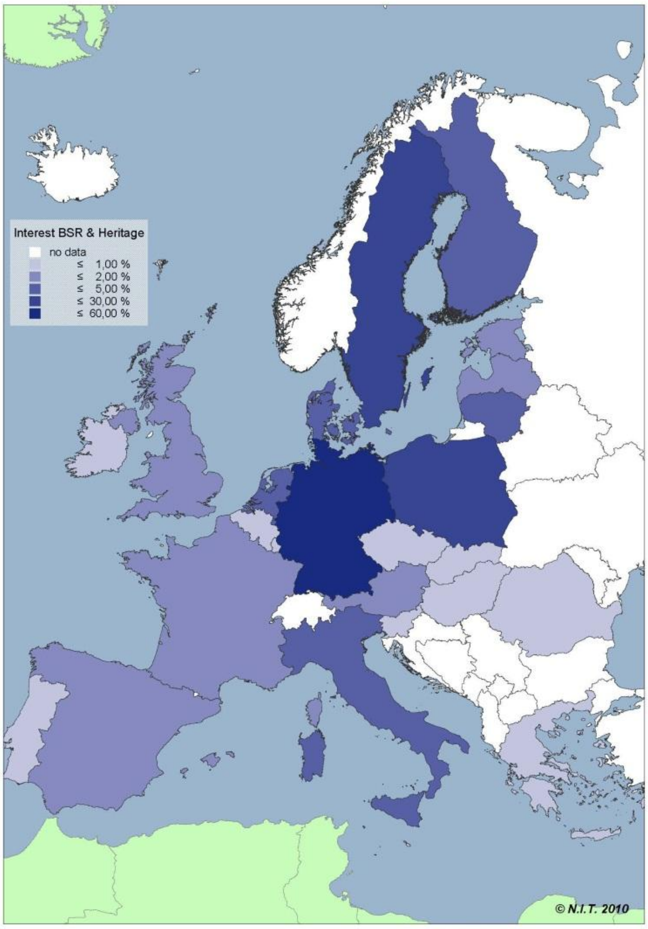


Cultural heritage of greater interest for people outside the BSR than environment

The main source regions of BSR-prospectives with focus on cultural heritage are Germany (36%) and Poland (26%), and then, there are Sweden (7%), Denmark (5%) and Finland (5%).

All other countries of the EU 27 have shares of less than 5%.

Main source regions: Germany and Poland



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Source regions of people with interest in BSR 2010 and influence of ‚cultural heritage‘ for destination choice

In %	BSR interest + Cultural heritage	BSR interest
1. Germany	36.2	39.2
2. Poland	26.1	32.2
3. Sweden	7.0	6.0
4. Denmark	4.9	2.4
5. Finland	4.9	4.6
6. Netherlands	3.7	1.7
7. Lithuania	3.2	2.8
8. Italy	3.0	1.5
9. France	2.0	1.2
10. Spain	1.5	1.3
11. United Kingdom	1.4	1.7
12. Estonia	1.1	1.1
13. Austria	1.1	0.6
14. Latvia	1.0	1.4
15. Belgium	0.8	0.6
16. Portugal	0.5	0.3

In %	Cultural heritage + BSR interest	BSR interest
17. Czech Republik	0.4	0.2
18. Greece	0.4	0.5
19. Hungary	0.2	0.2
20. Romania	0.2	0.2
21. Ireland	0.2	0.1
22. Cyprus	0.1	0.0
23. Luxembourg	0.0	0.0
24. Malta	0.0	0.0
25. Slovenia	0.0	0.0
26. Slovakia	0.0	0.0

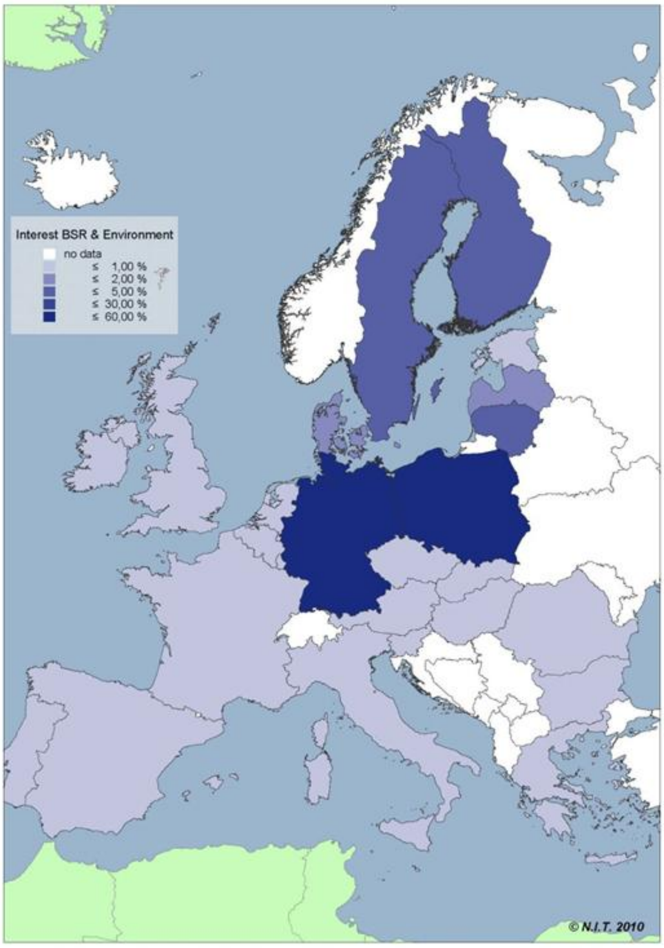
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

Germany (50%) and Poland (31%) are the main source regions of BSR-prospectives mainly influenced by environment.

Sweden (5%) and Finland (4%) are the next biggest source markets, the other EU 27-countries have very small market shares.

Main source regions:

Germany and Poland



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Source regions of people with interest in BSR 2010 and influence of ‚environment‘ for destination choice

In %	BSR interest	BSR interest + environment
1. Germany	39.2	49.6
2. Poland	32.2	30.6
3. Sweden	6.0	4.7
4. Finland	4.6	4.2
5. Lithuania	2.8	3.2
6. Denmark	2.4	1.2
7. Latvia	1.4	1.2
8. Estonia	1.1	0.9
9. Italy	1.5	0.7
10. Spain	1.3	0.6
11. Belgium	0.6	0.5
12. France	1.2	0.5
13. United Kingdom	1.7	0.5
14. Austria	0.6	0.4
15. Netherlands	1.7	0.3
16. Greece	0.5	0.2
17. Romania	0.2	0.2
18. Portugal	0.3	0.2
19. Czech Republik	0.2	0.1
20. Bulgaria	0.1	0.1
21. Ireland	0.1	0.0
22. Luxembourg	0.0	0.0
23. Hungary	0.2	0.0
24. Malta	0.0	0.0
25. Cyprus	0.0	0.0
26. Slovenia	0.0	0.0
27. Sklovakia	0.0	0.0

Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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7. BSR-prospectives with major motivation ‘nature’ and ‘culture’

This chapter gives a detailed description of two target groups for BSR Heritage Tourism:

- 3,25 mn EU-27-citizens with BSR interest 2010 and main motivation **‘culture/religion’** for their main holiday trip 2009
- 6.67 mn EU-27-citizens with BSR interest 2010 and main motivation **’nature’** for their main holiday trip 2009.

Both groups are analysed concerning touristic and sociodemographic aspects.

7.1. Target group profiles

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BSR interest and 'culture/religion': Main results

Means of transport
- Airplane 34% (Ø*: 18%)
- Bus 26% (9%)
- Car/motorbike 23% (59%)
- Train 7% (10%)
- Boat 7% (2%)
- …

Main attractions
- Cultural heritage 57% (23%)
- Environment 20% (46%)
- Art 11% (4%)
- Entertainment 5% (12%)
- …

Holiday plans
- Prefer a medium duration or a combination of long and short trips within the same year
- Germany, Poland and Sweden are most attractive destinations for main holiday

Information sources
- Recommendations 59% (62%)
- Internet 35% (48%)
- Travel/tourist agencies 30% (14%)
- Media 20% (11%)
- …

3.25 mn BSR interest and 'culture/ religion'

Traditional vs. emerging destinations
- 49% prefer traditional, well-known destinations (58%)
- 66% expect local culture, lifestyle and tradition from emerging destinations (32%)

Abdicable leisure spendings
- Shopping 32% (24%)
- Beauty/Wellness 22% (27%)
- Sports/acitivities 12% (10%)
- Restaurants/cafés 10% (12%)
- …

Main source regions
1. Germany 39%
2. Sweden 12%
3. Poland 10%
4. Denmark 7%

75% live in the BSR (90%)

Sociodemographic aspects
- 71% female (52%), 29% male (48%)
- High share of teens and twens (15-30 yrs.) and people aged 61-70
- 39% retired (27%), 27% employees (30%) and 15% students (11%)

* Ø for EU 27-citizens with BSR interest

Basis: EU 27-citizens with BSR interest and main motivation ‚culture/religion' for their main holiday trip 2009 (n=102)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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BSR interest and 'nature': Main results

Means of transport
- Car/motorbike 71% (Ø*: 59%)
- Bus 10% (9%)
- Train 9% (10%)
- Airplane 7% (18%)
- Boat 2% (2%)
- …

Main attractions
- Environment 52% (46%)
- Cultural heritage 27% (23%)
- Entertainment 8% (12%)
- Festivals & other events 5% (5%)
- …

Holiday plans
- Longer holidays are preferred
- Germany, Poland and Sweden are most attractive destinations for main holiday

Information sources
- Recommendations 58% (62%)
- Internet 49% (48%)
- Personal experience 25% (31%)
- Guidebooks/magazines 21% (13%)
- Catalogues/brochures 18% (15%)
- …

6.67 mn BSR interest and 'nature'

Traditional vs. emerging destinations
- 56% prefer traditional, well-known destinations (58%)
- 41% expect local culture, lifestyle and tradition from emerging destinations (32%), 20% expect a better environmental quality (12%)

Abdicable leisure spendings
- Beauty/Wellness 35% (27%)
- Shopping 25% (24%)
- Restaurants/cafés 9% (12%)
- Entertainment 9% (11%)
- Sports/acitivities 9% (10%)
- …

Main source regions
1. Germany 55%
2. Poland 17%
3. Sweden 8%

89% live in the BSR (90%)

Sociodemographic aspects
- 50% female (52%), 50% male (48%)
- 60% are older than 50 years (39%)
- 36% retired (27%), 26% employees (30%) and 8% students (11%)

* Ø for EU 27-citizens with BSR interest

Basis: EU 27-citizens with BSR interest and main motivation ‚nature' for their main holiday trip 2009 (n=211)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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7.2. Travel propensity and frequency in 2009

While 44% of EU27-BSR-prospectives with major motivation nature and 41% of EU27-prospectives with major motivation culture did not go on short private trips in 2009, the majority of both target groups has made both short private and holiday trips in 2009 (55% vs. 56%),

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Travel propensity of EU27-citizens and main motivation ‚nature' / ‚culture' for their main holiday trip

	EU27-citizens with interest in BSR 2010 and ‚nature' on main holiday trip			EU27-citizens with interest in BSR 2010 and ‚culture' on main holiday trip		
	Both - Short private and holiday trips	Only short private trips (< 4 nights)	Only holiday trips* (≥ 4 nights)	Both - Short private and holiday trips	Only short private trips (< 4 nights)	Only holiday trips* (≥ 4 nights)
Travel propensity	55%	-	44%	56%	-	41%

The majority went on short trips and holiday trips

Indicated are % and means
*In paid accommodation
Question Q2: „And how many of these were private trips, where you stayed away for less than four nights?"/Question Q3: „How many times did you go on a holiday in 2009, where you either stayed in paid accommodation/or in your second home for a minimum of four nights?"
Basis: EU 27-citizens with BSR interest and main motivation ‚nature' for their main holiday trip 2009 (n=211); EU 27-citizens with BSR interest and main motivation ‚culture/religion' for their main holiday trip 2009 (n=102)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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Number of short private and/or holiday trips of target groups

	EU27-citizens with interest in BSR 2010 and ‚nature' on main holiday trip			EU27-citizens with interest in BSR 2010 and ‚culture' on main holiday trip		
	Short private and/or holiday trips	Short private trips (< 4 nights)	Holiday trips* (≥ 4 nights)	Short private and/or holiday trips	Short private trips (< 4 nights)	Holiday trips* (≥ 4 nights)
1 time	24	28	45	17	33	39
2 times	18	28	28	21	35	29
3 times	18	14	14	22	5	25
4-5 times	21	12	9	27	14	4
6-10 times	11	12	2	8	7	1
10+	8	6	3	4	3	2
DK/NA	-	-	-	1	43	-

Indicated are % and means; *In paid accommodation
Question Q2: „And how many of these were private trips, where you stayed away for less than four nights?"/Question Q3: „How many times did you go on a holiday in 2009, where you either stayed in paid accommodation/or in your second home for a minimum of four nights?"
Basis: respondents who made at least one short private and/or holiday trip in 2009, one short private trip resp. one holiday trip; Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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7.3. Characteristics of main holiday trip 2009

7.3.1. Means of transport

In 2009, most BSR-interests (59%) reached their main holiday destination by car or motorbike; 18% used an airplane, 10% the train and 9% came by bus.

In terms of means of transport, there are big differences between the two BSR Heritage Tourism target groups: While most nature-motivated persons took the car (71%), went one third of the culture/religion-motivated travellers by plane (34%), 26% used the bus and only 23% came by car. Boat trips are interesting for this group as well.

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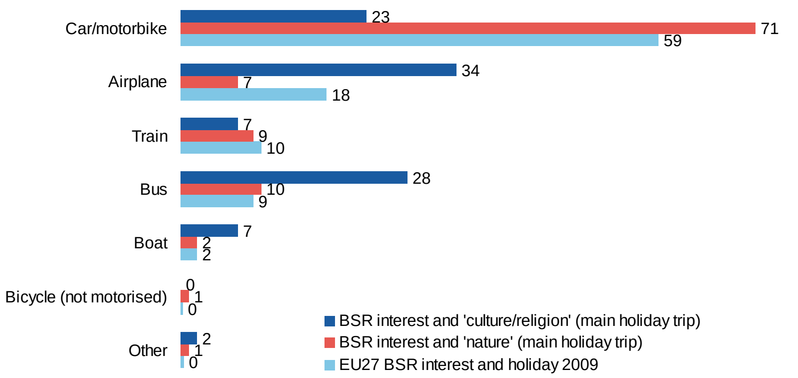
Nature vacationists use car/motorbike very often, culture vacationists show no clear preference



Indicated are %; Caused by roundings the sum ist not always 100%.
Question Q6: „How did you travel there in 2009? (what was the main method of transport?)“ (selection of seven)
Basis: EU27-citizens interested in spending their main holiday 2010 in one of the BSR countries <u>and</u> travelled in 2009 (n=1,834), EU-citizens with BSR interest <u>and</u> main motivation ‚nature' for their main holiday trip 2009 (n=211), EU-citizens with BSR interest <u>and</u> main motivation ‚culture/religion' for their main holiday trip 2009 (n=102)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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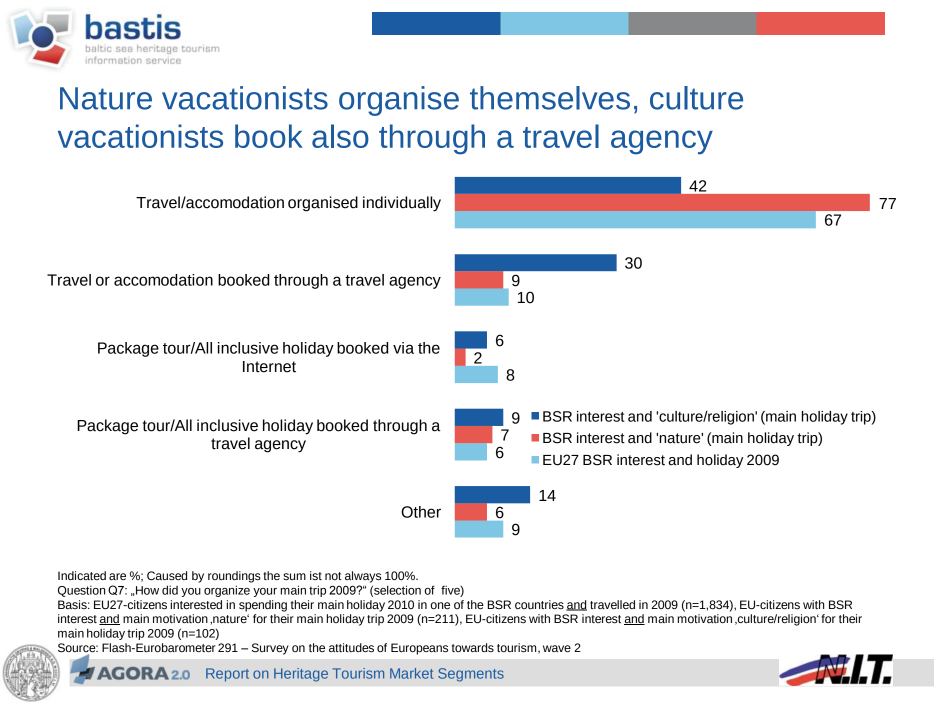
Culture vacationists are open to all modes of transport

Nature vacationists usually take the car

7.3.2. *Travel organisation*

An overwhelming majority of 77% of nature-motivated travellers stated that they organised their travel/accommodation individually. Most culture/religion-motivated main holidaymakers were organising their trip individually as well (42%), but almost the same share (39% including those who book package tours or All Inclusive holidays) preferred to book through a travel agency. Package tours and All Inclusive holidays were only booked by a minority, but are obviously more interesting for culture-motivated travellers than for nature-seekers.



Culture vacationists use various forms of organisation

¾ of nature vacationists organised their trip individually

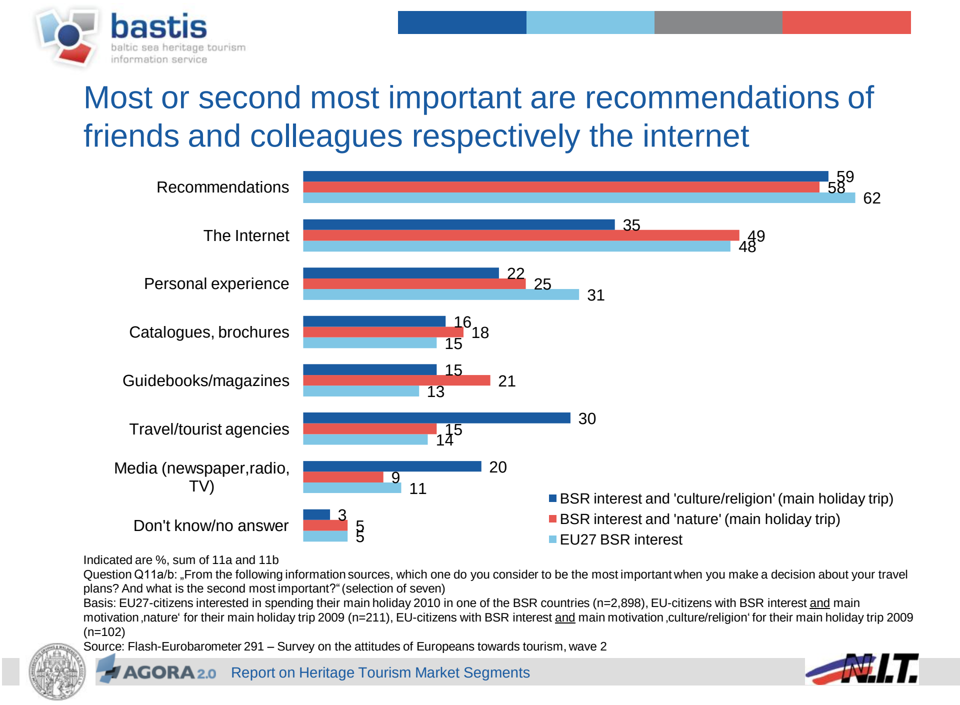
7.4. Considerations when planning a holiday or choosing a destination

7.4.1. Information sources

For both targets groups, recommendations of friends are ranked on top of all information sources. The Internet follows on rank 2 and is especially often used by people with BSR interest and nature. Personal experience and guidebooks/magazines are also often named by this group.

30% of all prospective travellers with major motivation culture/religion use information from travel or tourist agencies (all BSR-prospectives: 14%). At least one out of five culture/religion-motivated BSR prospects feels informed because of former personal experience, but media (newspaper, radio, TV) are important sources for this group, too.

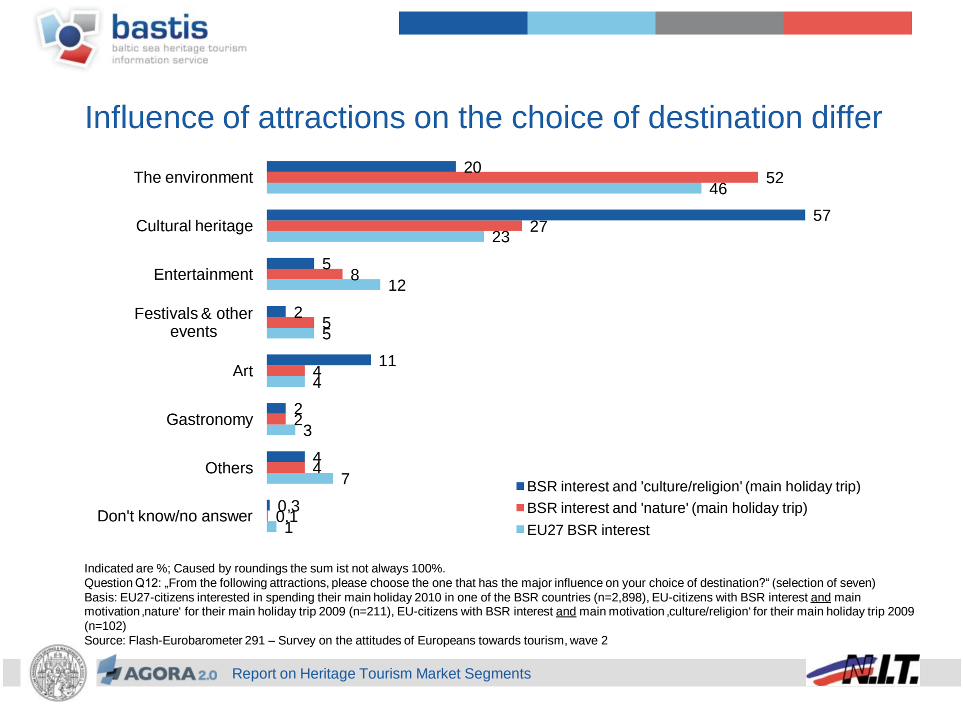
Recommen-dations and the internet on top of information sources



7.4.2. Influence of attractions on choice of destination

As one could expect, there is a visible relation between the major holiday motivation and the influence of attractions on the choice of a destination. The motivation ‘culture/religion’ is clearly linked to the attraction ‘cultural heritage’ (57%) and the motivation ‘nature’ is strongly associated with the ‘environment’ (52%).

But, at the same time, 20% of culture vacationists say that the environment has the most important influence on their choice of destination and 27% of nature vacationists see their destination choice mainly influenced by the cultural heritage.

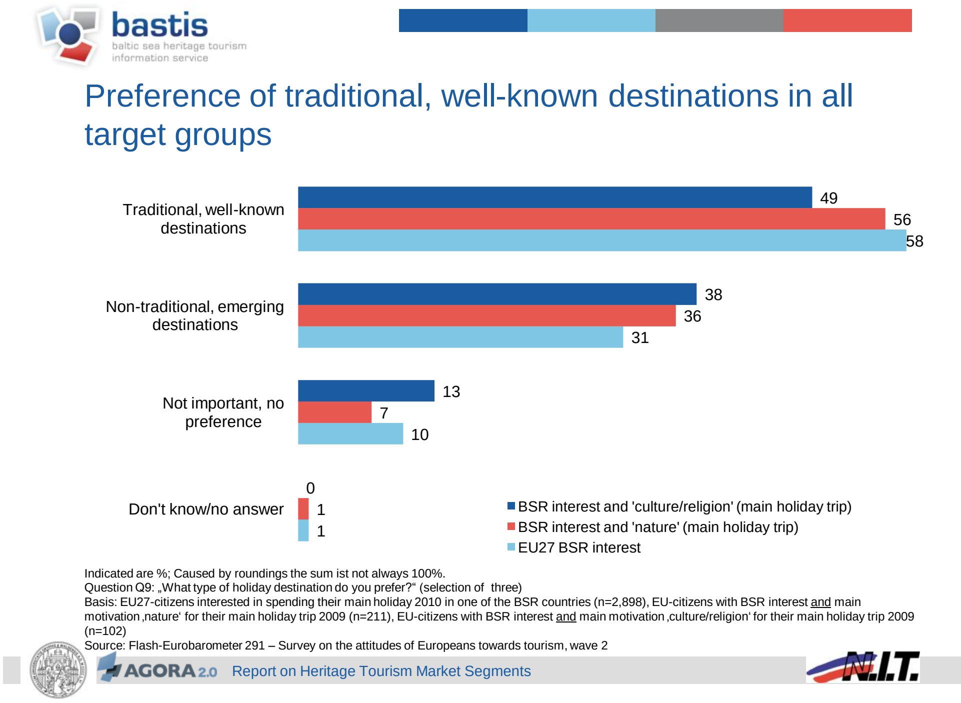


Environment and cultural heritage with biggest influence on choice of destination

7.4.3. *Traditional vs. non-traditional destinations*

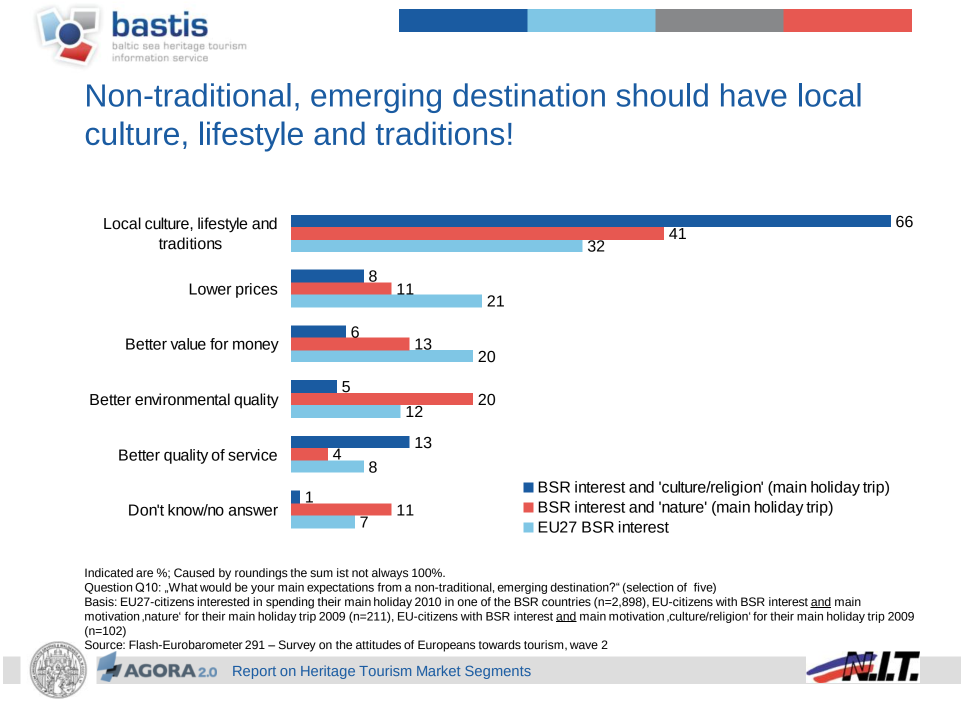
Being asked, if they prefer traditional, well-known destinations or non-traditional emerging destinations, most BSR-prospectives of both target groups choose the first alternative. Anyhow, it is obvious that culture-vacationists are a little less fixed on visiting well-known destinations than nature vacationists.

Culture and nature vacationists show more interest in emerging destinations than other BSR-prospectives



From a non-traditional, emerging destination, both culture- and nature vacationists would first off all expect local culture, lifestyle and traditions. While prospective BSR-travellers with major motivation nature also emphasize that they would expect a better environmental quality, is a better quality of service named comparably often by culture-vacationists.

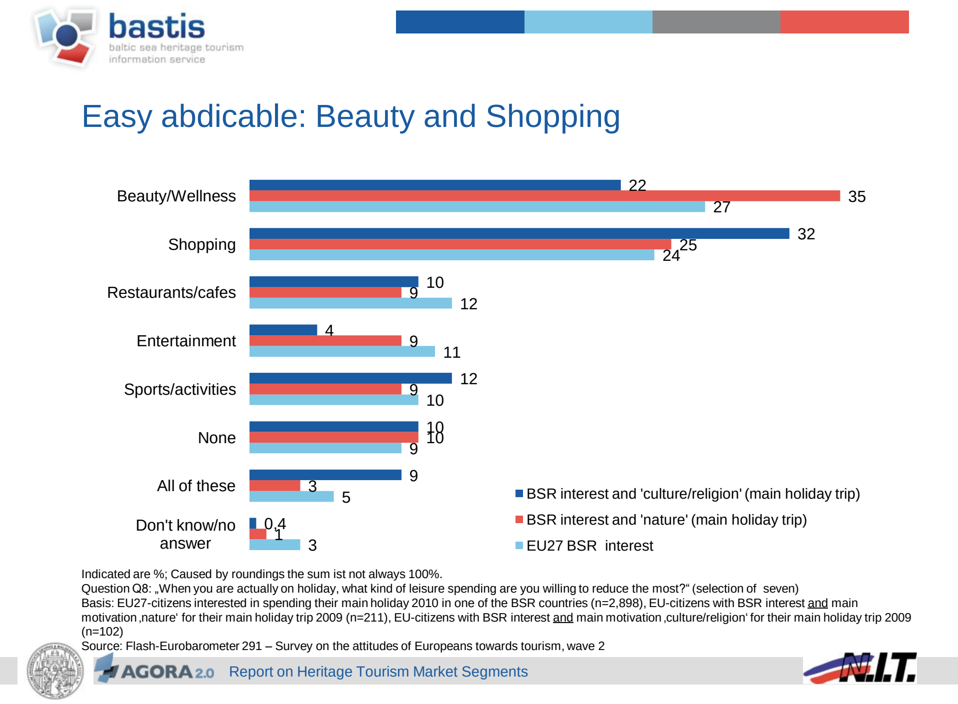
Expectations from an emerging destination



7.4.4. Abdicable leisure spendings

If necessary, beauty/wellness and shopping are the leisure spendings which culture and nature vacationists would be willing to reduce the most.

One third of all nature vacationists could most easily imagine to reduce their holiday spendings on beauty/wellness (culture vacationists: 22%), for every third culture vacationists shopping is most easily abdicable on holiday (nature vacationists: 25%). For both groups it is harder to travel without resp. with less visits of restaurants/cafés, entertainment or sports/activities.



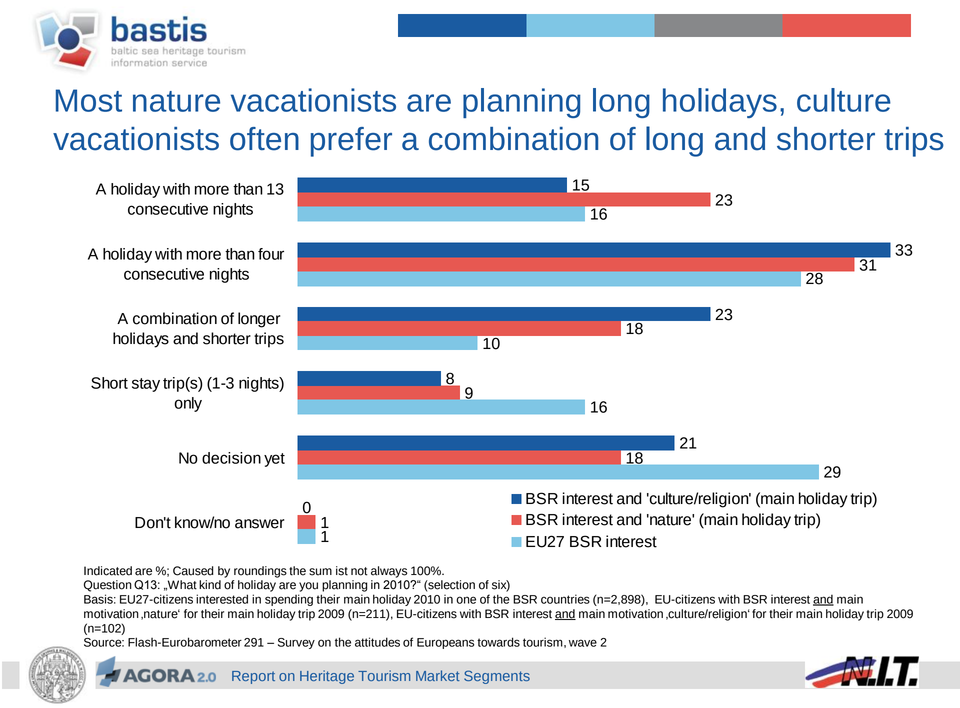
Hard to abandon from entertainment, sports and restaurants

7.5. Vacation plans for 2010

7.5.1. Types of vacation

Holidays with more than 13 consecutive nights are especially favoured by nature vacationists: 23% want to stay on holiday two weeks or longer, 31% plan a holiday with more than four (and less than 14) nights and 18% would prefer a combination of longer holidays and shorter trips. Culture vacationists are fond of holidays with medium duration or want to experience both long and short trips within one year.

By the time being interviewed (February 2010), one out of three respondents with BSR interest had not made a decision about the kind of holidays he/she would make that year. Nature and culture vacationists have made up their mind earlier - only around 20% didn't know what kind of holiday they would make in 2010.



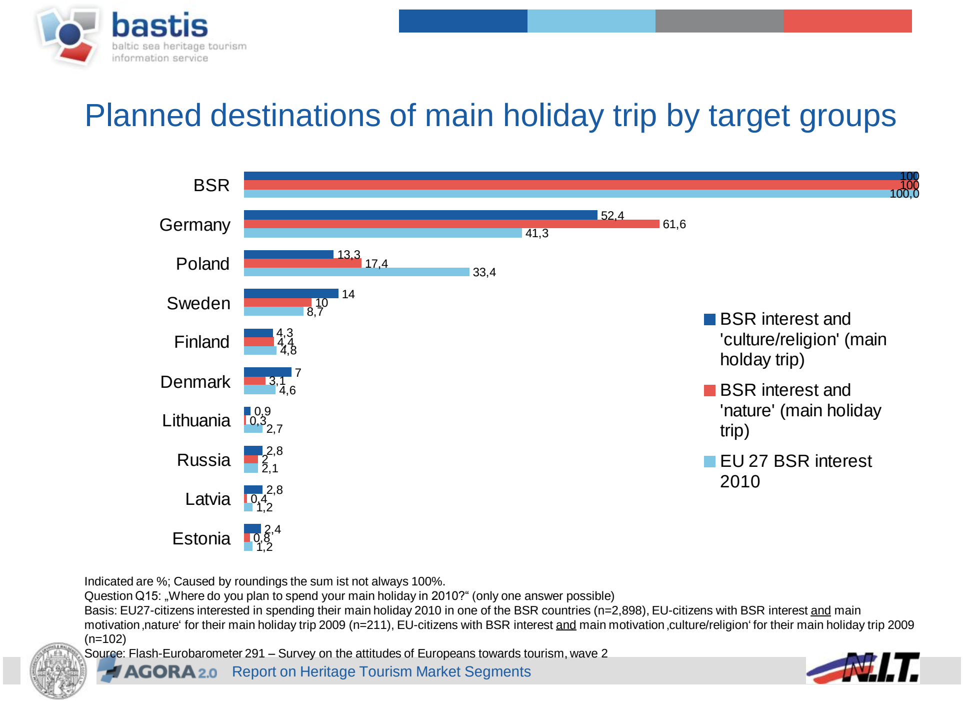
What holiday plans do culture and nature vacationists have?

7.5.2. *Planned destinations*

Most prospective BSR-travellers with major motivation nature are planning their main holiday in Germany (62%). Then, there is a huge gap, before Poland with 17% and Sweden with 10% follow as prospective number 2 and 3. Finland (4%) and Denmark (3%) can be found on prospective rank 4 and 5.

Germany is the top destination for culture-vacationists as well. More than half of them name Germany as planned destination for their main holiday in 2010. Sweden with 14% and Poland with 13% are again the followers, Denmark with 7% is here on rank 5.

Germany, Poland and Sweden are mentioned most often



7.6. Sociodemographic description

<u>BSR interest and 'culture/religion':</u>
The interest for culture and religion is a domain for female BSR-prospectives (71% vs. 29% men). Most of them are either very young (15-30 years) or aged 61-70 years. All other age groups have market shares beneath-average. People of medium age (31-40 years) belong rather seldom to this segment. Every second person lives in a town/other urban centre; rural zones are a little underrepresented. In terms of employment, this market segment consists mainly of three groups: 39% retired people, 27% employees (including a high share of upper employees) and 15% students; whereas there are almost no manual workers.

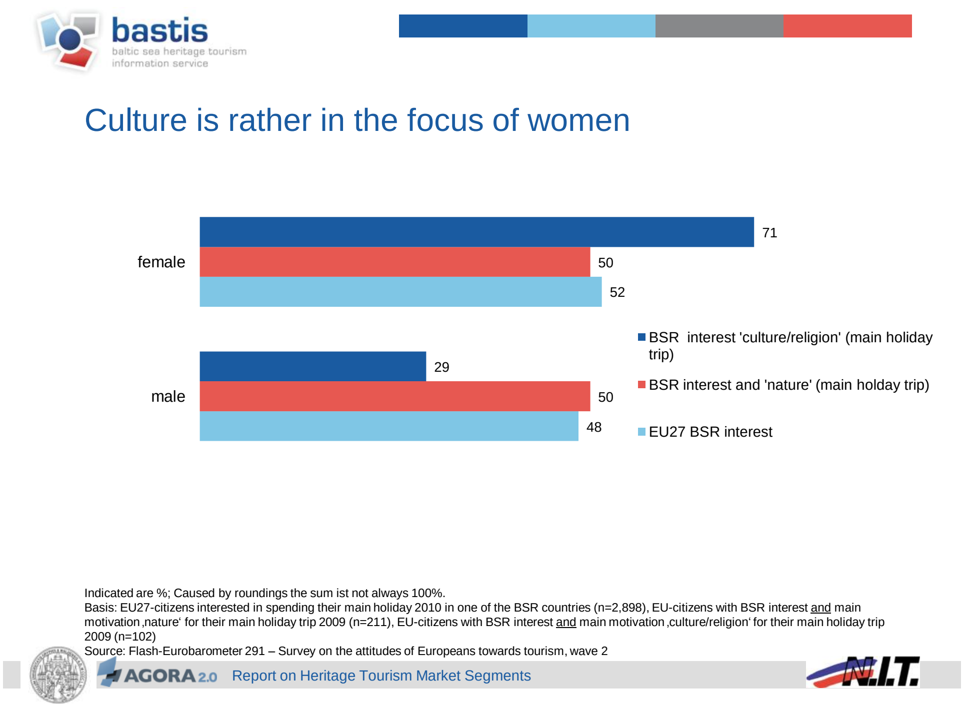
Typical <u>culture</u> vacationist:

Female, lives in an urban centre, student or retired

<u>BSR interest and 'nature':</u>
The target group consists of 50% women and 50% men, almost 60% are 51 years and older, a share that is – compared to all EU 27 BSR prospectives - above-average. They live predominantly in towns/other urban centres or rural zones, but comparatively often in metropolitan areas. Although there are few students and unemployed people in this market segment, the amount of persons without professional activity is big: 36% are retired!

Typical <u>nature</u> vacationist:

Above 50 yrs., retired



Sex

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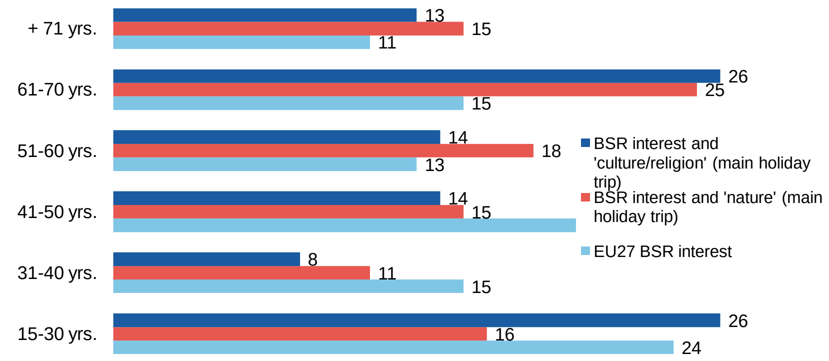
Emphasis of prospective BSR-customers on the elderly



Age

Indicated are %; Caused by roundings the sum ist not always 100%.
Basis: EU27-citizens interested in spending their main holiday 2010 in one of the BSR countries (n=2,898), EU-citizens with BSR interest and main motivation ‚nature' for their main holiday trip 2009 (n=211), EU-citizens with BSR interest and main motivation ‚culture/religion' for their main holiday trip 2009 (n=102)
Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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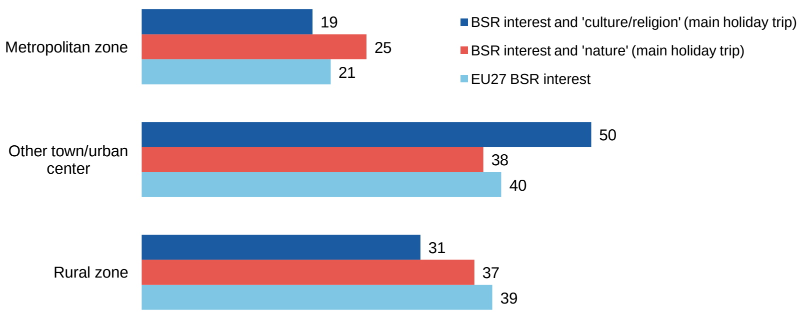
Prospective customers live in rural zones and other urban centers



Place of living

Indicated are %; Caused by roundings the sum ist not always 100%.
Basis: EU27-citizens interested in spending their main holiday 2010 in one of the BSR countries (n=2,898), EU-citizens with BSR interest and main motivation ‚nature' for their main holiday trip 2009 (n=211), EU-citizens with BSR interest and main motivation ‚culture/religion' for their main holiday trip 2009 (n=102)
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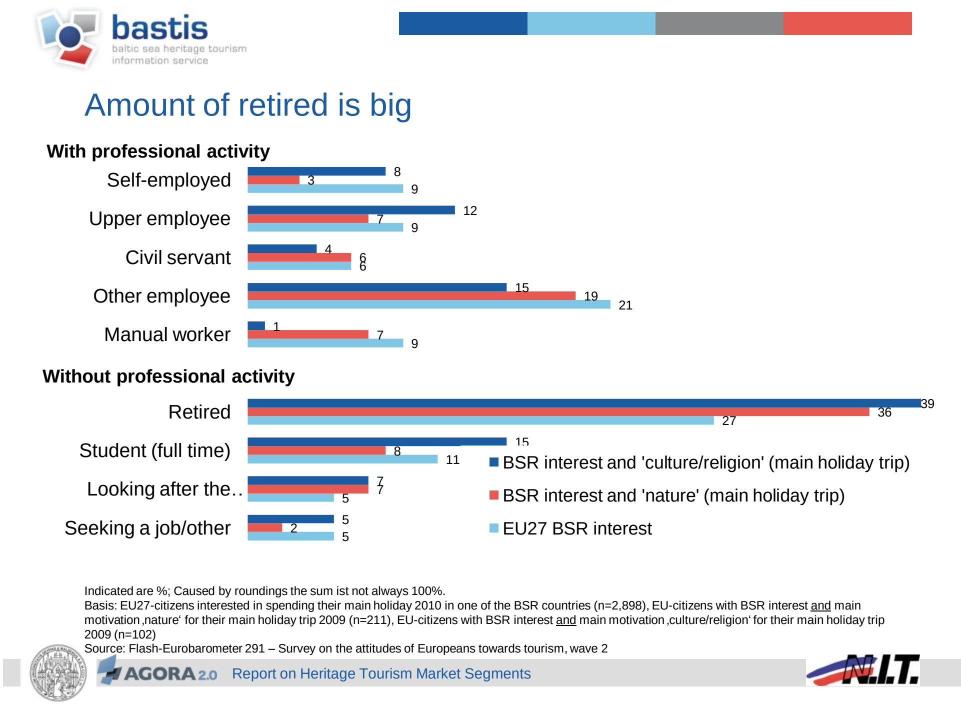
Professional status

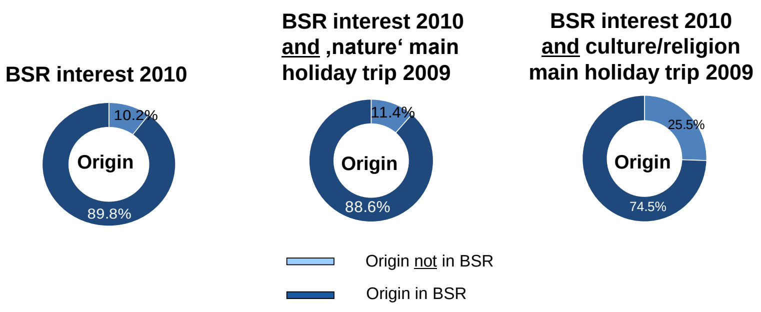


7.7. Source regions

Almost 90% of the EU 27-citizens who are interested in a holiday in the BSR are inhabitants of the BSR. The analysis also shows that the share of "domestic" prospectives is higher for nature-vacationists (89%) than for culture-vacationists (75%).

Most prospectives live in the BSR

Interest in BSR is a big domestic market



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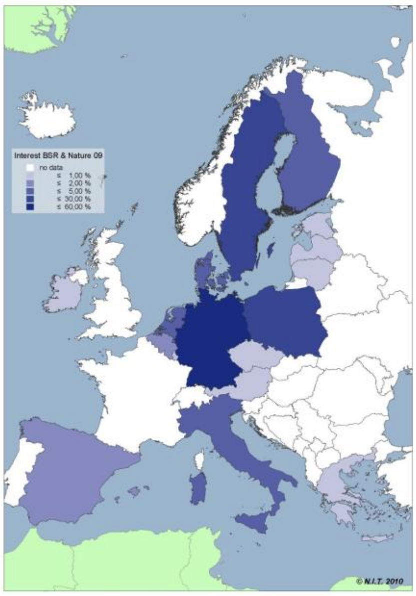
Every 2nd nature vacationist lives in Germany

Most nature-motivated travellers come from Germany (55%). Other important source countries within this segment are Poland (17%), Sweden (8%), Finland (5%) and the Netherlands (4%).

Source regions of people with interest in BSR 2010 and major motivation ‚nature' for their main holiday trip 2009

In %	BSR interest + nature	BSR interest
1. Germany	55.0	39.2
2. Poland	17.2	32.2
3. Sweden	7.6	6.0
4. Finland	4.6	4.6
5. Netherlands	4.2	1.7
6. Italy	3.3	1.5
7. Denmark	2.8	2.4
8. Belgium	1.7	0.6
9. Spain	1.2	1.3
10. Lithuania	0.7	2.8
11. Estonia	0.5	1.1
12. Greece	0.3	0.5
13. Austria	0.2	0.6
14. Ireland	0.1	0.1
15. Czech Republik	0.1	0.2
16. Latvia	0.1	1.4
17. Luxembourg	0.1	0.0
18. Malta	0.0	0.0



Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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The source regions of prospective BSR-travellers with major motivation culture show a greater variety. The main source region is Germany with a market share of 39%. Sweden and Poland are following with 12% resp. 10%. And between 3 and 7% of all culture-vacationists come from either Denmark, Italy, Finland, the Netherlands, United Kingdom, Spain or Austria.

Top source regions of culture vacationists: Germany, Sweden and Poland

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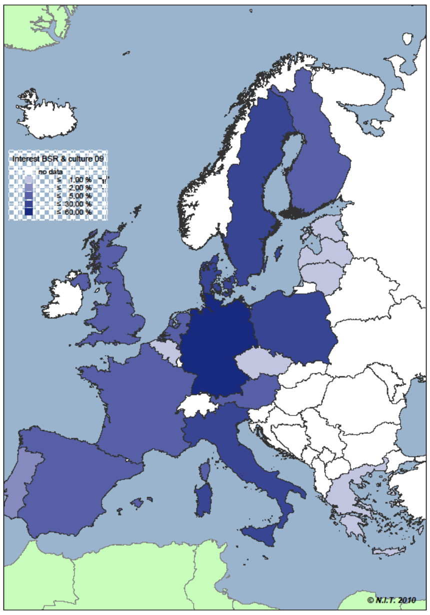
Source regions of people with interest in BSR 2010 and major motivation ‚culture' for their main holiday trip 2009

In %	BSR interest + culture	BSR interest
1. Germany	39.1	39.2
2. Sweden	12.0	6.0
3. Poland	10.0	32.2
4. Denmark	6.7	2.4
5. Italy	5.1	1.5
6. Finland	4.8	4.6
7. Netherlands	4.5	1.7
8. United Kingdom	3.6	1.7
9. Spain	3.6	1.3
10. Austria	3.2	0.6
11. France	2.3	1.2
12. Portugal	1.4	0.3
13. Latvia	0.8	1.4
14. Estonia	0.8	1.1
15. Greece	0.7	0.5
16. Belgium	0.7	0.6
17. Czech Republik	0.5	0.2
18. Lithuania	0.2	2.8



Source: Flash-Eurobarometer 291 – Survey on the attitudes of Europeans towards tourism, wave 2

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8. Conclusions

road interest for Heritage Tourism in the BSR

First of all, the re-analysis of Flashbarometer No. 291 shows that there is a broad interest for Heritage Tourism among the prospective Baltic Sea Region-vacationists. ¾ of all prospectives belong to at least one of the four defined BSR-Heritage target groups, based on the main motivations and the major influence of attractions on the choice of the destination.

Nature of bigger interest than culture

An eye-catching result of the target group analysis is that the market volume of BSR-prospectives with interest in nature/environment is much larger than the share of BSR-prospectives with interest in culture/cultural heritage (ratio of 2:1).

Favourite destinations = main source markets

Another amazing result is that the interest for the BSR is a big domestic market: The favourite destinations are identically with the main source regions (Germany, Poland, and Sweden). This means, that the target groups are especially interesting for suppliers of these countries, but the information can of course be helpful for other destinations as well.

Focus on attractions…

In general, all four segments can be used as a basis for marketing purposes. The direct comparison shows that there are only very few differences between the segments ‘nature’ and ‘environment’ resp. ‘culture/religion’ and ‘cultural heritage’. In order to avoid overlapping marketing-activities and to reach as many prospective visitors as possible, it makes therefore sense to focus on the two biggest target groups:

BSR interest & ‘environment’ with 26.97 mn prospectives

BSR interest & ‘cultural heritage’ with 13.34 mn prospectives.

… but don’t forget the other factors!

One of the prerequisites for success is – in addition to the existence of the attractions – that the range of tourism products fits to the target group’s main motivations (i.e. rest/recreation, but also ‘nature’), demographic background and touristic behaviour. The target group profiles deliver the prerequisite for addressing the prospective travellers successfully and to meet their needs.