MMGY TCI Research

Poland Reputation Tracker

VISITOR EXPERIENCE IN POLAND'S CULTURAL ATTRACTIONS

travelsat

Polska POLISH TOURISM ORGANISATION

About MMGY TCI Research

POWERING DESTINATIONS' SUCCESS THROUGH DATA

FACTS

Founded in 2010 – **UNWTO Awarded**

Leader in **Destination Competitive Intelligence**

Visitor Sentiment / **Resident** Sentiment / **Place** Reputation

100+ DMO clients in the 5 continents

UN-Tourism / ETC referenced Solutions **designed for DMOs**

Forewords

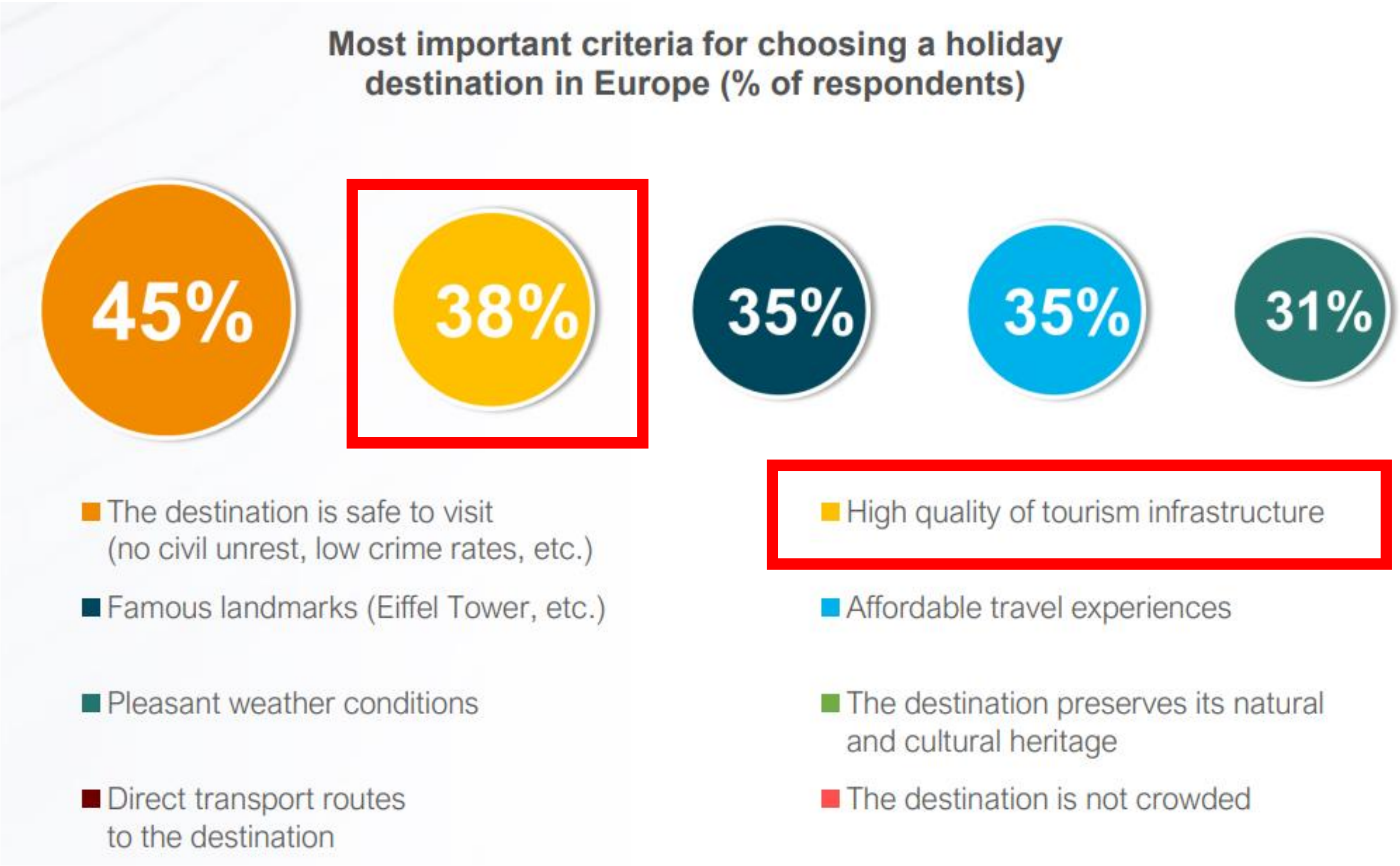
WHY FOCUSING ON CULTURAL EXPERIENCES MATTER

EUROPEAN TRAVEL COMMISSION

Source: MMGY / ETC Barometer Long-Haul Markets

Forewords

WHY MEASURING VISITOR SATISFACTION MATTERS



EUROPEAN TRAVEL COMMISSION

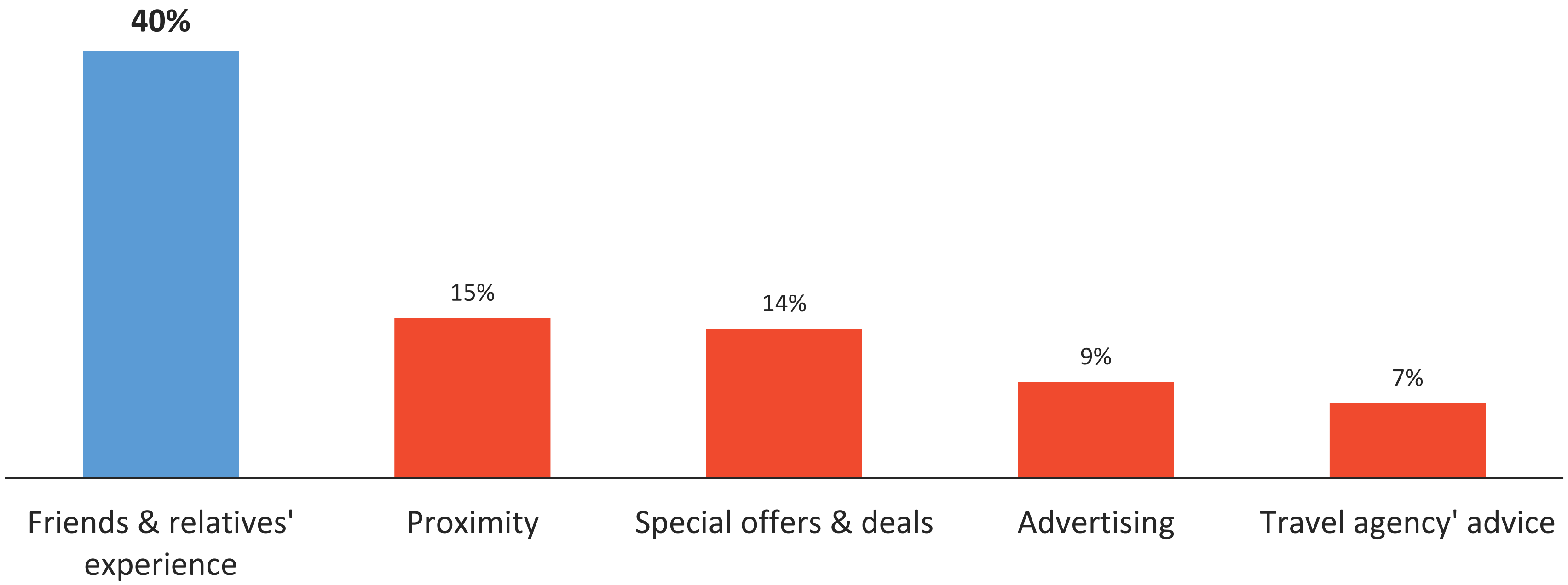
Source: MMGY / ETC Barometer Long-Haul Markets

Forewords

WHY MEASURING VISITOR SATISFACTION MATTERS

Happy visitors today recruit new visitors tomorrow

Influence of Destination Selection Criteria – *What prompted mostly your decision to choose this destination?*



Source: TRAVELSAT© Competitive Index Survey 2023/24

Key Sentiment Trends

POLAND’S ONLINE SOCIAL REPUTATION – TRAVEL & CULTURE

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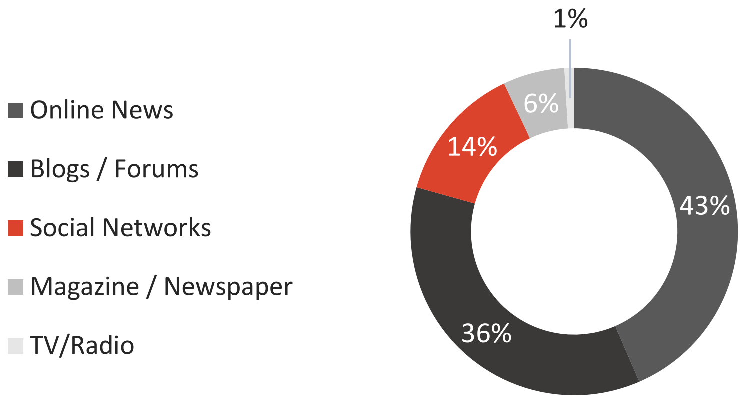
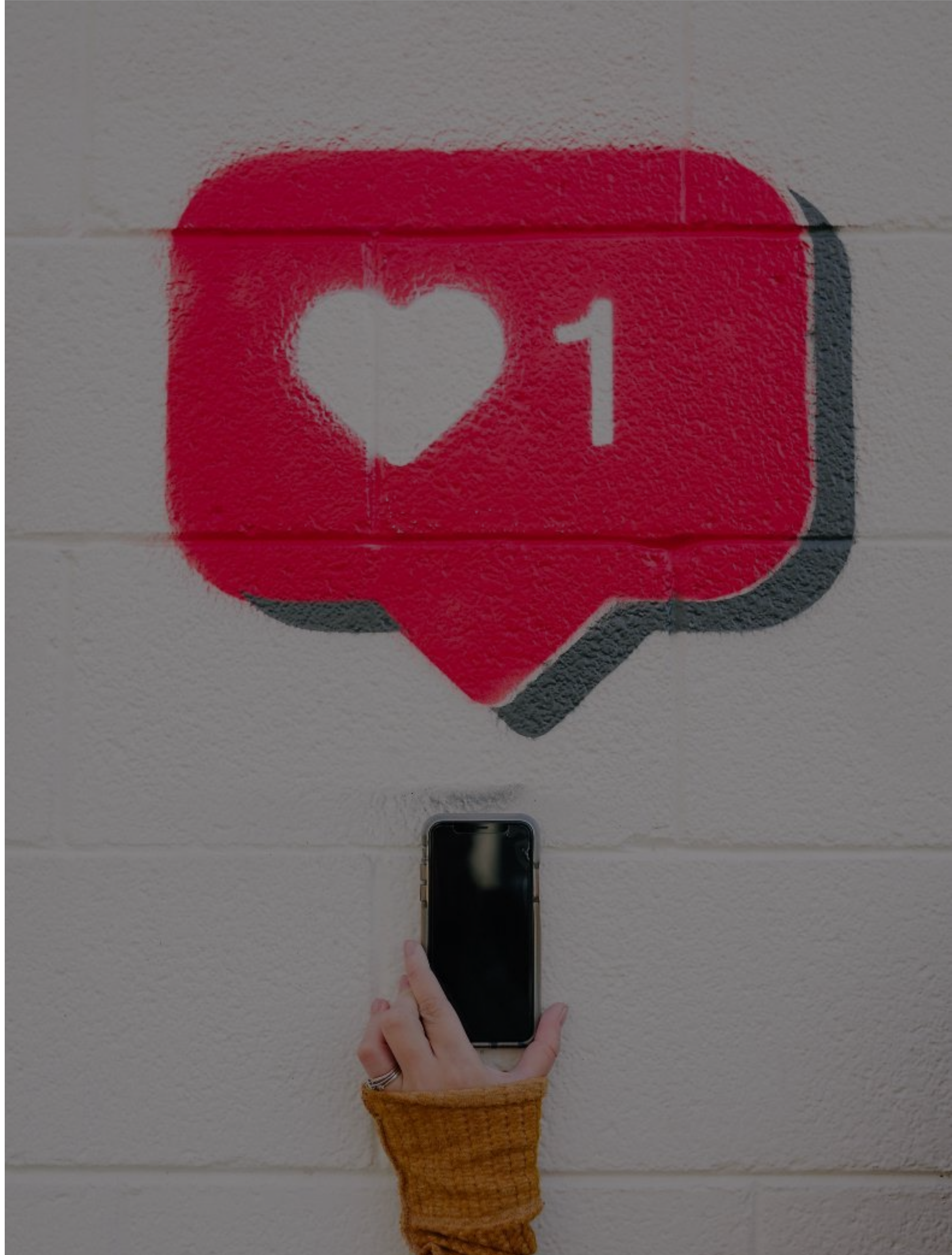
Sentiment Tracker

DESTINATION REPUTATION AT LARGE

Analysing online social data

- The **"sentiment"** reflects the **state of travel brands' online reputation**. These are seen through **online social conversations at a global level**.
- They are shared by differing **media**, **consumers**, **companies**, **citizens**, **brands** and **officials on websites**, **forums**, **blogs** & **social networks**.
- While sentiment is not predictive of travellers' planning, **a positive e-reputation is essential to generate favourability towards destinations** and travel brands, particularly when choosing a destination.
- From January to mid-October 2023, **Poland was mentioned 54.4K+ in social conversations** in relation to travel and culture, generating **519.6K engagements**, shared by **22K+ unique authors** from **165+ countries**.





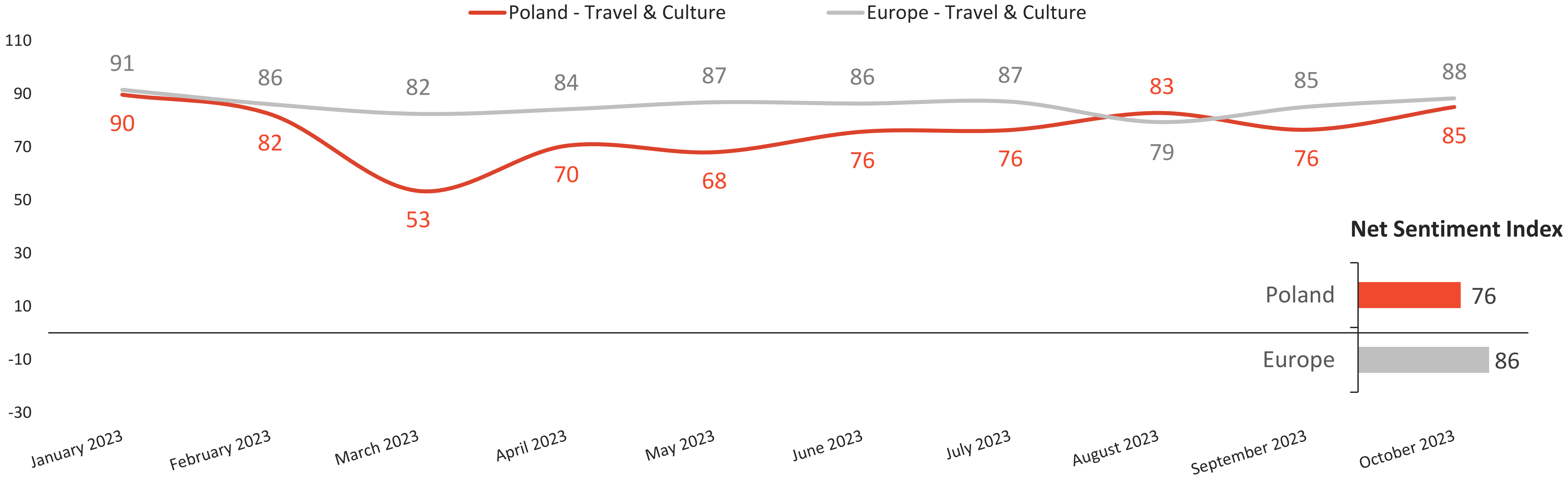
Note: For a full list of sources, please see appendix A.

Net Sentiment Index

TRENDS FOR POLAND'S ONLINE REPUTATION – TRAVEL & CULTURE

An online reputation affected by external factors

Poland's online social reputation in the topic of travel and culture **tends to be highly positively polarised**. At the same time, **the polarity of conversations** around this topic is scored slightly less positively **in Poland than in Europe on average.** The reason for this difference in polarity is that many online conversations about travel and culture in Poland are **inadvertently affected by the conflict in Ukraine** due to its proximity and the **political** and **safety concerns surrounding it**.



Period of analysis: January 1st, to October 15th, 2023. **Note**: The benchmark is composed of the European average.

Note: The data presented here stems from online social data. For a full list of sources, please see appendix A.

Experience Reputation

POLAND’S CULTURAL VISITOR EXPERIENCE

Ratings & Reviews

METHODOLOGICAL OVERVIEW

Consolidating ratings and reviews

- TRAVELSAT© Pulse uses a solid **aggregation methodology to consolidate reviews**, both **numerical scores** and **written feedback**, from sources that cater to different aspects of the tourism ecosystem.
- The platform presents all scores through **a consolidated scale of 0-10**. These have been **converted from their original source** and are **weighted to adjust the significance** that each source score has. Analyses are carried out across verticals, markets and guest profiles.

Sentiment analysis technology

- Beyond structured ratings, **written reviews are also analysed using the most developed sentiment lexicon**. This allows for an analysis of **positive and negative deflections by keywords** by sub-category and guest profile.
- The AI semantic engine **covers 14 languages**: *Arabic, Russian, Polish, Portuguese, Swedish, Norwegian, Danish, English, French, German, Dutch, Spanish, Italian, Finnish*. However, **Polish has not been taken into account for the current project as the purpose has been to study international markets' experiences.**

Note: For a full list of sources, please see appendix B.

Scope of Analysis

DEFINING POLAND'S TOURISM ECOSYSTEM

Sample definition & analysis period

- A **sample of 1000 cultural POIs** in Poland was randomly selected from its full Trip Advisor inventory to create a **representative picture of Poland's offer in cultural attractions**.
- The period ranging from **January 1st to October 15th, 2023,** has been used for analysis.

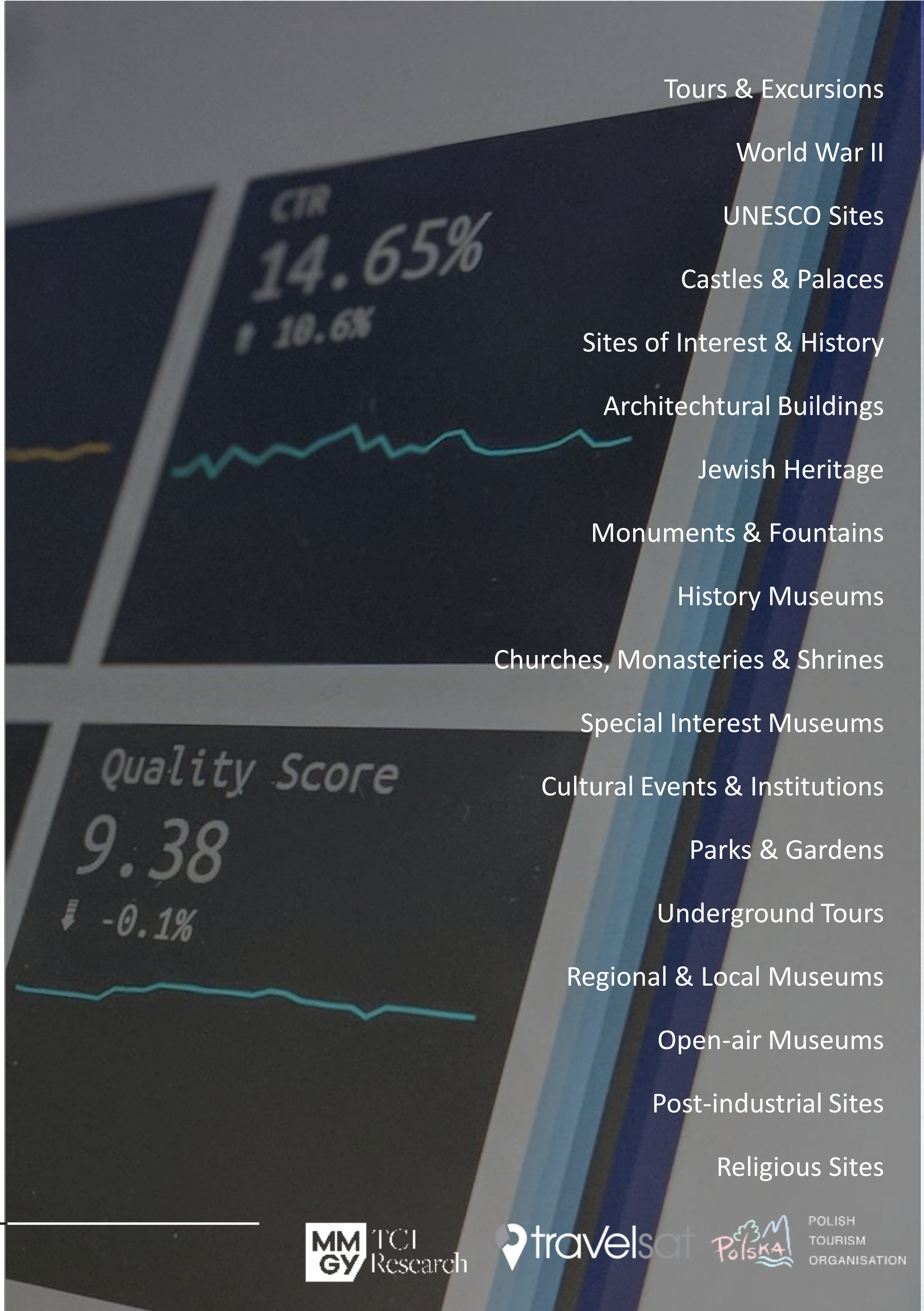
Reviews corpus analysed

Property Type	Reviews Count Poland (January to mid-October 2023)	Reviews Count Benchmark (January to mid-October 2023)
Cultural Attractions	14,702	347,727

Note: The benchmark is composed of the European average.

Sources connected to TRAVELSAT© Pulse's online sentiment tracker

- The sources range from search engines with a review function, such as Google, to complete online travel agencies, like Trip Advisor and Booking.com. Currently having **45 sources connected**, 95% of all experience-based data available online is analysed.
- All rating platforms collect **global data on the same KPIs**, ensuring **accuracy when comparing to other destinations**. Benchmarking data is therefore be based on the largest European Hospitality Datasets available.



Tours & Excursions

World War II

UNESCO Sites

Castles & Palaces

Sites of Interest & History

Architechtural Buildings

Jewish Heritage

Monuments & Fountains

History Museums

Churches, Monasteries & Shrines

Special Interest Museums

Cultural Events & Institutions

Parks & Gardens

Underground Tours

Regional & Local Museums

Open-air Museums

Post-industrial Sites

Religious Sites

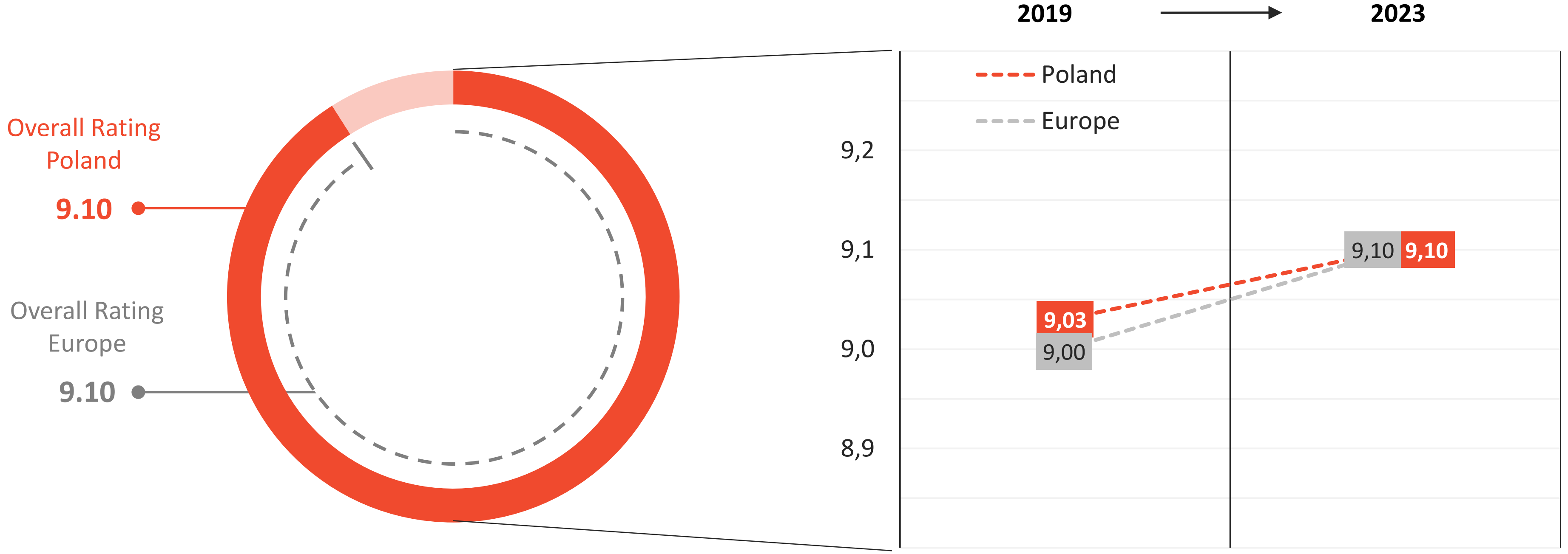
Note: For a full list of sources, please see appendix B.

Overall Experience Reputation

BENCHMARKING POLAND'S CULTURAL VISITOR EXPERIENCE

A competitive and resilient visitor experience

Poland's cultural visitor experience **is at par with that of the benchmark** in terms of overall rating. Comparing the change in scores prior to the COVID-19 pandemic (2019), **a similar evolution is perceived for Poland and Europe**. While such comparisons tend to show that several sectors have suffered a decrease in visitor satisfaction at a global level, it would seem that **cultural attractions have improved**.



Period of analysis: January 1st, to October 15th, 2023. **Note**: The benchmark is composed of the European average.

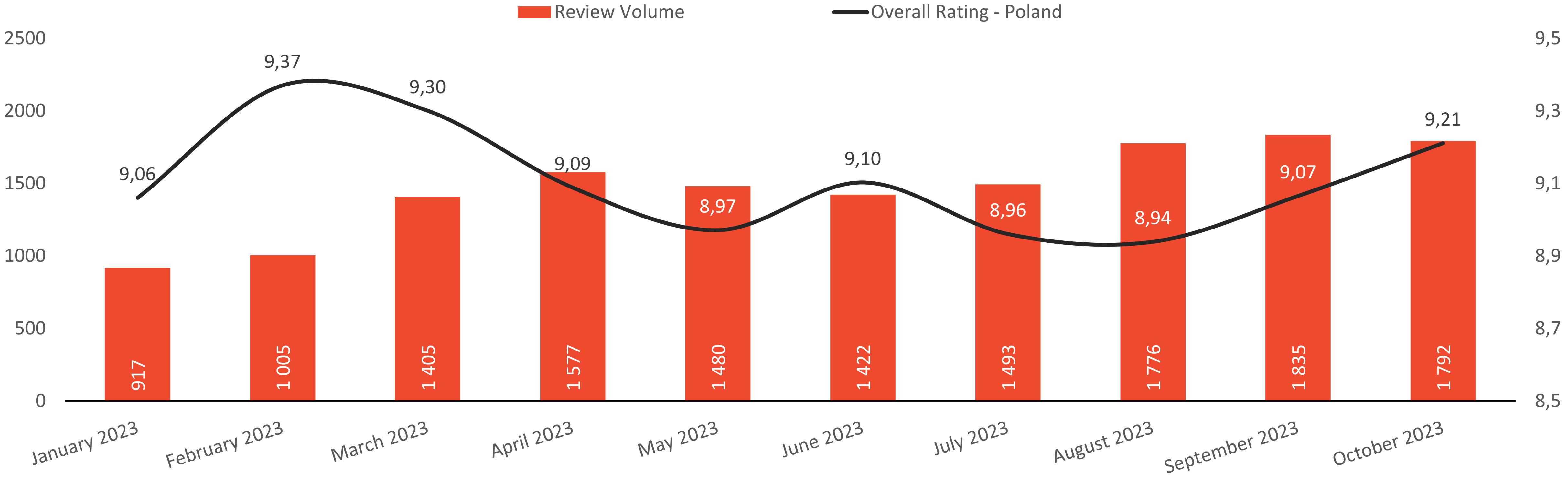
Note: The data presented here stems from ratings and reviews. For a full list of sources, please see appendix B.

Experience Reputation Trends

MONTHLY BREAKDOWN OF REVIEW VOLUME & OVERALL RATING

High satisfaction levels across the year – with a slight dip in summer

Poland's monthly **review volume** was **relatively lower in January**, steadily growing towards spring and **being higher in the summer**. While this is **a typical scenario**, likely matching visitation patterns, the relatively higher numbers seen in September and October are less common. Overall **rating is highest in February**, **dipping during the warmer months**. Higher visitation levels can **affect experience quality due to increased tourism pressure**, with a rebound seen right after summer.



Period of analysis: January 1st, to October 15th, 2023. **Note**: The benchmark is composed of the European average.

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Sentiment Analysis

GUESTS' WRITTEN REVIEWS FOR CUTLURAL ATTRACTIONS

Excellent scores for key indicators

International visitors' written reviews **highlight most positively** the **facilities** found in Poland's cultural attractions, followed by the attention of **personnel**, and the perceived **value for money** of such experiences.

The three previous topics are **also the most commonly spoken of**. Other **frequently mentioned dimensions** are the **location** and **transport** options of experiences, as well as the aspect of the **surrounding area** where attractions are. All mentioned topics are **considered in a very positive light**.

Reviewer topics that have a **relatively lower proportion of positive mentions** include guests' perception of the **sanitary safety**[1] at cultural attractions, the quality or availability of **toilets**, and experiences at the **ticket office**.

Finally, while **not often mentioned by reviewers**, the topic of **sustainability received very positive comments**, illustrating operators' dedication to environmentally-friendly practices.

Topic	Mentions	Sentiment Score
Attraction Facilities	15627	9.60
Personnel	8777	9.57
Value for Money	5399	9.54
Restaurant Offer	2356	9.29
Food	2390	9.23
Atmosphere	485	9.21
Hygiene	790	9.19
Transport & Location	5074	8.89
Surrounding Area	3918	8.78
Drinks	832	8.66
Bar Service	493	8.60
Sustainable Travel	190	8.35
Lighting	178	7.81
Sound	457	7.40
Internet Availability	182	6.64
Ticket Office	1268	6.54
Toilets	374	6.47
Sanitary Safety	381	5.49

Note: Topics have been ranked based on their sentiment score for Poland.

[1] While the Sanitary Safety and Hygiene cover similar subjects, Sanitary Safety searches for **comments that have been made specifically around health-related factors of cleanliness**, while Hygiene is about **general cleanliness**.

Period of analysis: January 1st, to October 15th, 2023. **Note**: The benchmark is composed of the European average.

Note: The data presented here stems from ratings and reviews. For a full list of sources, please see appendix B.

Sentiment Analysis

GUESTS’ WRITTEN REVIEWS FOR CUTLURAL ATTRACTIONS

Competitiveness across several key indicators

Poland is **most competitive** when it comes to comments around the level of **hygiene**[1], and the related experience of **sanitary safety**[1]. Both indicators are crucial to positive visitor experiences, with the latter being especially crucial in a post-COVID travel context.

The **location** and **transport** options of different cultural activities in Poland is also a topic that is **more competitive than for the benchmark**. Additionally, the very important indicator of **value for money** is also considered more highly.

Reviewers are **less positive compared to the benchmark** in their feedback on the general **atmosphere**, **food** and **drink** options, and experiences around **ticket offices**.

However, the topics that fall most behind in reviews for Poland are those related to the availability or quality of **internet**, and perceived **sound** or **noisiness**.

Topic	Mentions	Difference vs. Benchamark
Hygiene	790	1.09
Sanitary Safety	381	0.89
Transport & Location	5074	0.29
Value for Money	5399	0.24
Sustainable Travel	190	0.15
Surrounding Area	3918	0.08
Attraction Facilities	15627	0.00
Restaurant Offer	2356	-0.01
Personnel	8777	-0.03
Atmosphere	485	-0.09
Food	2390	-0.17
Lighting	178	-0.29
Drinks	832	-0.44
Ticket Office	1268	-0.46
Toilets	374	-0.53
Bar Service	493	-0.60
Sound	457	-0.70
Internet Availability	182	-1.16

[1] While the Sanitary Safety and Hygiene cover similar subjects, Sanitary Safety searches for **comments that have been made specifically around health-related factors of cleanliness**, while Hygiene is about **general cleanliness**.

Note: Topics have been ranked based on their difference in score compared to the benchmark.

Period of analysis: January 1st, to October 15th, 2023. **Note**: The benchmark is composed of the European average.

Note: The data presented here stems from ratings and reviews. For a full list of sources, please see appendix B.

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Segments & Tourism Areas

CULTURAL VISITOR EXPERIENCE BY SEGMENT & TOURISM AREA

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Rating per Market

VISITOR EXPERIENCE FOR POLAND'S TOP MARKETS

Satisfactory scores across all main markets

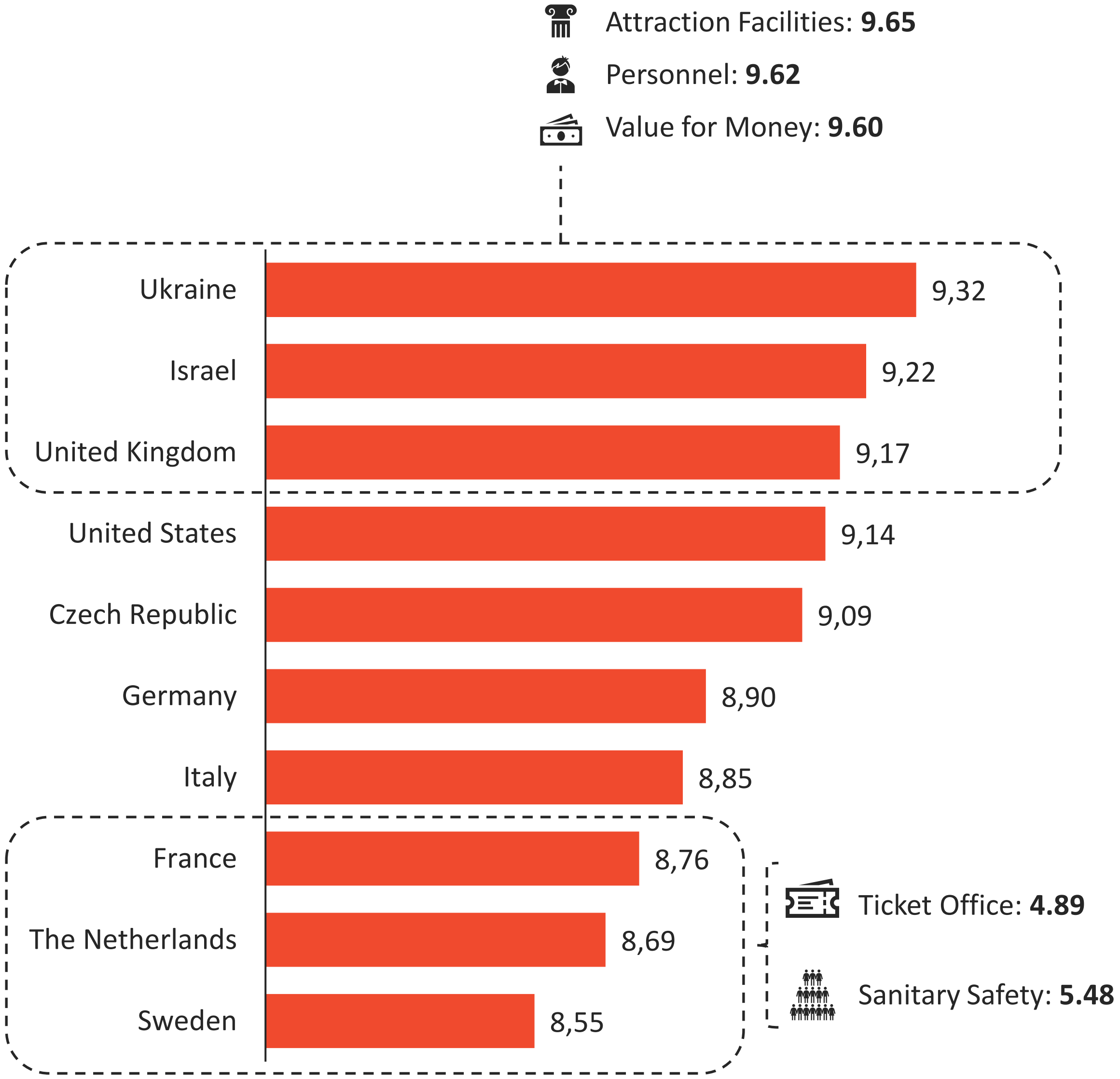
Overall scores broken down by the key international markets show that visitors from **Ukraine**, **Israel**, and the **United Kingdom** have **rated their experiences the highest**.

Digging deeper into what may be behind such high scores for these three markets, attractions' **facilities**, the attention of **personnel**, and the **value for money seem to be key factors**.

Visitors from the **United States** and the **Czech Republic** share similar scores, followed by those from **Germany** and **Italy**.

On the lower end, **French**, **Dutch**, and **Swedish** travellers have left **the lowest ratings relative to the others**. Experiences around the perceived **sanitary safety** and **ticket offices** may suggest that **crowdedness or waiting lines may have affected their experience**.

However, scores across all markets can be considered satisfactory, leaving a slight room for improvement for the bottom three.



Period of analysis: January 1st, to October 15th, 2023.

Note: The data presented here stems from ratings and reviews. For a full list of sources, please see appendix B.

Rating per Traveller Composition

VISITOR EXPERIENCE BY TRAVELLER COMPOSITION

Cultural attractions that cater to all segments

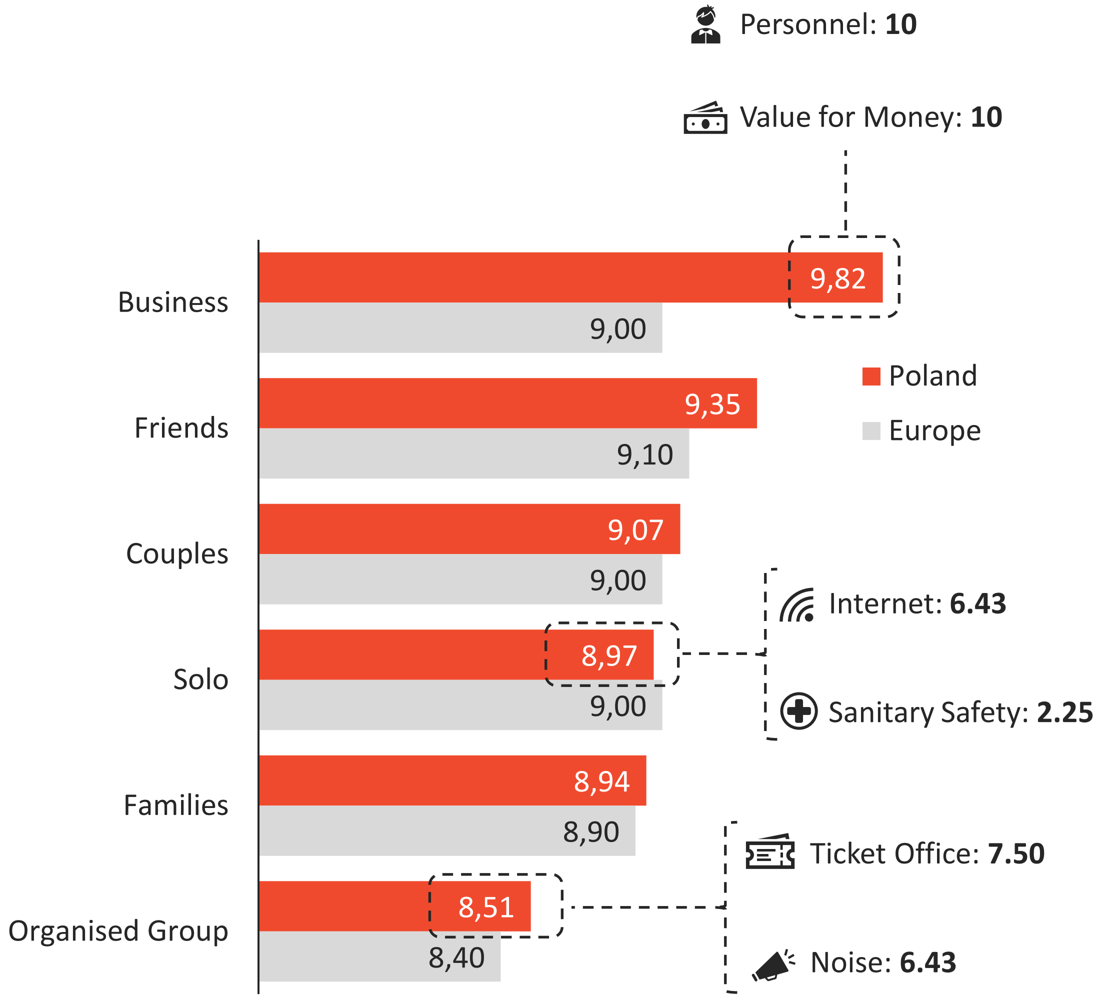
Business travellers have **tended to leave the highest ratings** by a significant margin. Experiences with **personnel** at cultural attractions and the perceived **value for money** have **received perfect praise**, two points which are important for this segment.

While not being a traditionally "leisure-oriented", visitors in this segment often **take the opportunity to explore cultural activities when possible**.

Business travellers have also **rated their cultural experiences much more highly in Poland** than in other European destinations. Those travelling with their **friends** and **organised groups also rate their experiences more competitively**.

Solo travellers score their experiences **slightly lower in Poland compared to the European norm**. Sentiment scores show that they have felt less favourable regarding **internet** provision and the perception of **sanitary safety**.

Finally, while **organised groups** leave higher ratings in Poland than Europe, they **have tended to give the lowest scores**. Complications around **ticket offices** and **noise** levels could be having an effect.



Period of analysis: January 1st, to October 15th, 2023. **Note**: The benchmark is composed of the European average.

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Quadrant Analysis

DEFINING THE QUADRANTS OF VISITOR EXPERIENCE

Visitor Experience (Score /10)

+

Hidden Gems

Properties or operators that have a number of reviews that is lower on average, with overall ratings that are higher on average.

Reputation Drivers

Properties or operators that have a number of reviews that is higher on average, with overall ratings that are higher on average.

-

\+ **Review Volume**

Less Exposed Areas

Properties or operators that have a number of reviews that is lower on average, with overall ratings that are lower on average.

Vigilance Areas

Properties or operators that have a number of reviews that is higher on average, with overall ratings that are lower on average.

-

Note: The analysis on the following page will place Poland's Tourism Areas in the four quadrants presented here.

Period of analysis: January 1st, to October 15th, 2023.

Quadrant Analysis: Visitor Areas

IDENTIFYING REPUTATION DRIVERS, HIDDEN GEMS, VIGILANCE & LESS EXPOSED AREAS

An even mix of reputation drivers and hidden gems

Dividing Poland's tourism areas into four separate quadrants based on their review count and overall rating, it can be seen that the **Three Cities**, **Southern Poland**, and **Warsaw** are clear **reputation drivers**. This means that they have a high number of reviews couples with high scores.

Krakow also makes part of this group, although its review count is much higher, making it an outlier.

Tourism areas with lower review counts on average, yet high overall scores are considered **hidden gems**. **Eastern Poland**, **Central Poland**, and the **Major Cities** fall within this category.

On the opposite side, the **vigilance areas** are considered to be **Western** and **Southwest Poland**, holding a high number of reviews but lower scores.

Period of analysis: January 1st, to October 15th, 2023. **Note**: The average score and review volume have been calculated without the consideration of outliers.

Note: The data presented here stems from ratings and reviews. For a full list of sources, please see appendix B.

Rating per Tourism Area

VISITOR EXPERIENCE BY TOURISM AREA

Excellency across all cities monitored

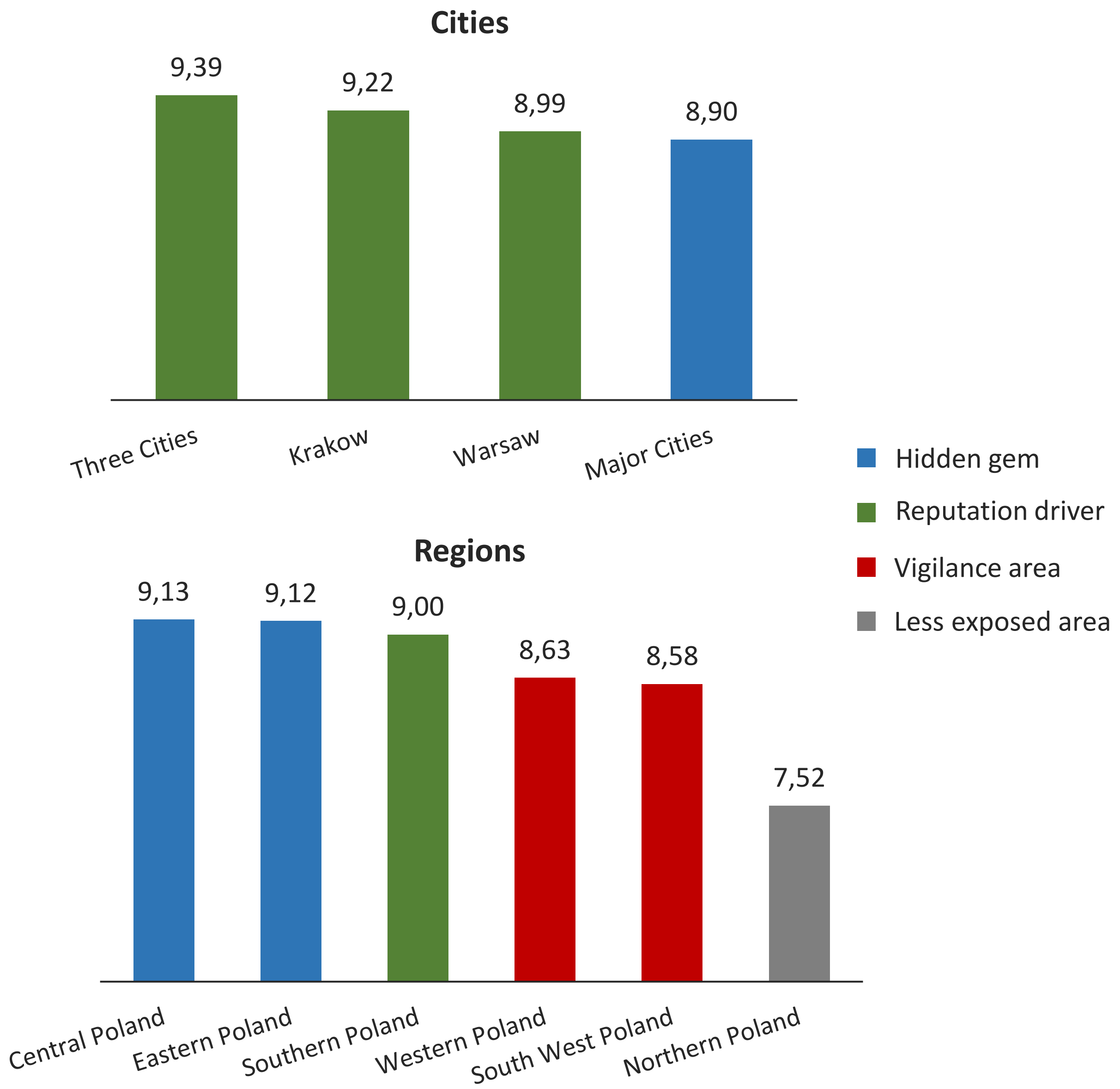
Visitor experiences for **cultural attractions in Poland's main cities are all exceptionally well rated**, with the Three Cities, Krakow, Warsaw, and the Major Cities all holding above average scores.

While the **highest scoring are clear reputation drivers**, the **Major Cities are a hidden gem** in terms of review volume. Therefore, they hold the possibility for further promotion.

A greater divide in terms of regional differences

When it comes to regions, **Central**, **Eastern**, and **Southern Poland all hold above average scores**. Conversely, the **highest scoring regions are in fact hidden gems**.

On the other hand, while **Western** and **Southwest Poland** receive a high number of reviews, **their scores place them as vigilance areas**. Lastly, **Northern Poland leaves space for both** promotion, as well as in the quality of guests' experiences.



Period of analysis: January 1st, to October 15th, 2023.

Note: The data presented here stems from ratings and reviews. For a full list of sources, please see appendix B.

Culture Experience Categories

CULTURAL VISITOR EXPERIENCE BY SUB-CATEGORY

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Quadrant Analysis: Experience Categories

IDENTIFYING REPUTATION DRIVERS, HIDDEN GEMS, VIGILANCE & LESS EXPOSED AREAS

Several opportunities for future reputation drivers

The **majority of experience categories score higher than the average score**, exemplifying how Poland manages to delight visitors in its offer of cultural attractions.

At the same time, **many of the categories having higher scores on average also have lower average review counts**, making them hidden gems. Examples of these include **Cultural Events & Institutions**, and especially **Regional & Local Museums**.

Clear **reputation drivers** include **Sites of Interest & History**, **World War II Tours**, and **Tours & Excursions**. The last two obtain an especially high number of reviews, suggesting a very high level of visitation.

Certain categories would merit some vigilance due to their high review volumes on average and lower ratings, including Architectural Buildings for example.

Finally, **Parks & Gardens hold a high potential of becoming a hidden gem** due to the score's proximity to the average.

Period of analysis: January 1st, to October 15th, 2023.

Note: The average score and review volume have been calculated without the consideration of outliers.

Note: The data presented here stems from ratings and reviews. For a full list of sources, please see appendix B.

Rating per Experience Category

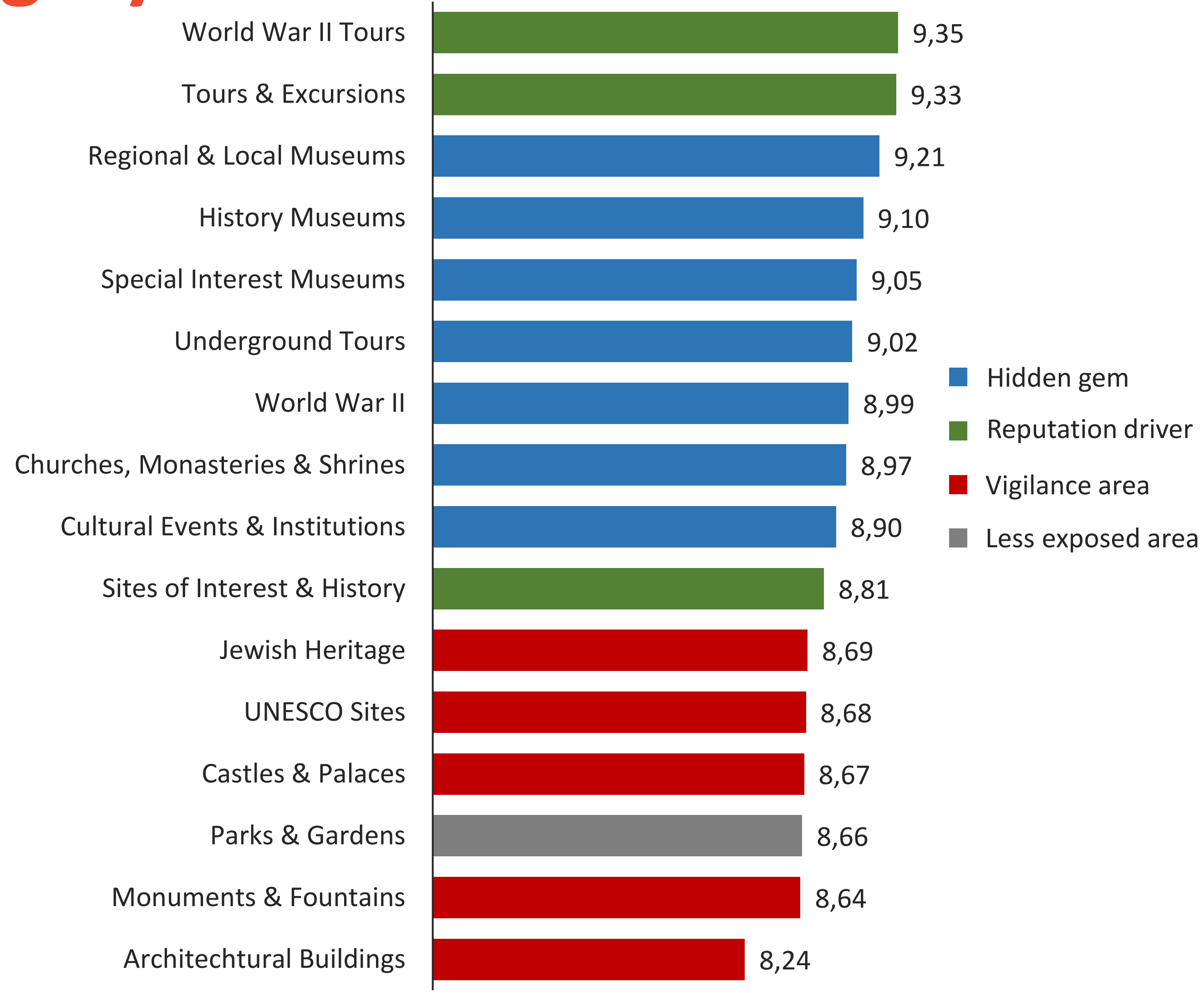
VISITOR EXPERIENCE BY EXPERIENCE CATEGORY

A majority of experiences generating high visitor satisfaction

Placing all experience categories together demonstrates how **many of the high scoring cultural attractions are hidden gems**, presenting opportunities for growth in Poland's cultural attractions.

At the same time, **World War II Tours** and **Tours & Excursions** are **clear leaders in the cultural activity space** in Poland.

While **less than half of the experience categories score under the attraction average**, and **their overall scores demonstrate high visitor satisfaction in absolute terms**, understanding the gaps that these categories face are a sure way to ensuring a higher degree of visitor satisfaction.



Note: The analysis also concerns the data presented in the previous slide.

Period of analysis: January 1st, to October 15th, 2023.

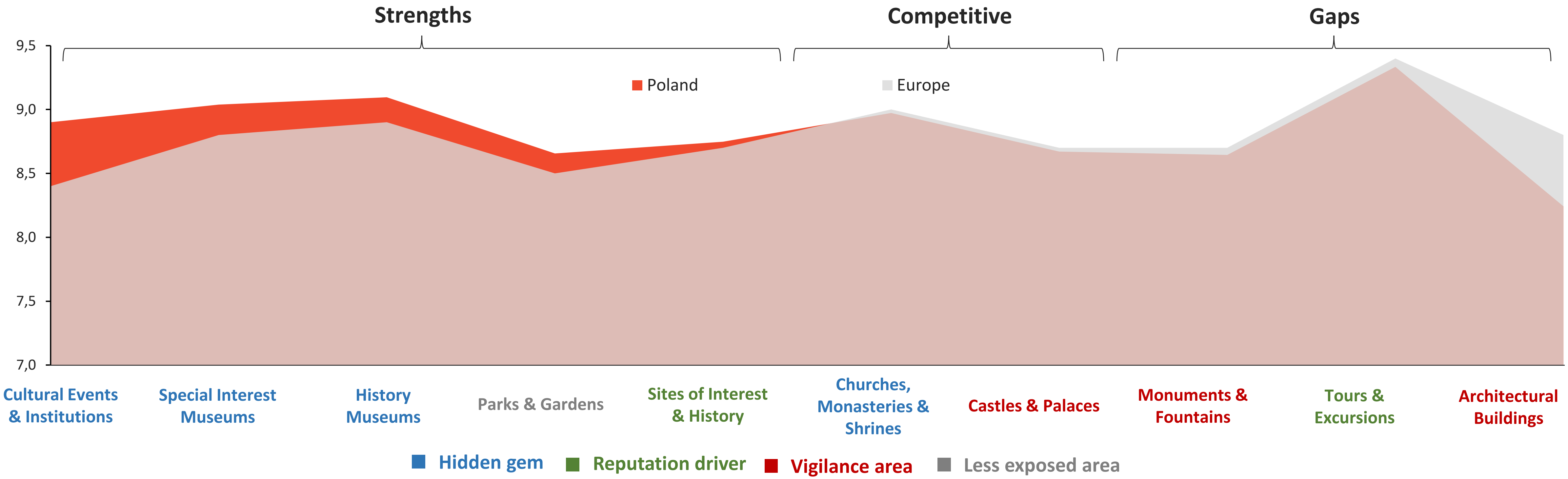
Note: The data presented here stems from ratings and reviews. For a full list of sources, please see appendix B.

Experience Category Benchmarks

POLAND'S EXPERIENCE CATEGORIES COMPARED TO THE EUROPEAN AVERAGE

Turning current strengths to future opportunities

Comparing scores for experience categories to the European average equivalent displays that **Poland has several highly competitive strengths**. Interestingly, **the majority of these experiences are currently considered hidden gems or less exposed experiences**, with the exception of Sites of Interest & History, which is a reputation driver. Conversely, **the reputation driver Tours & Excursions is at a slight gap for Poland** compared to the European norm.

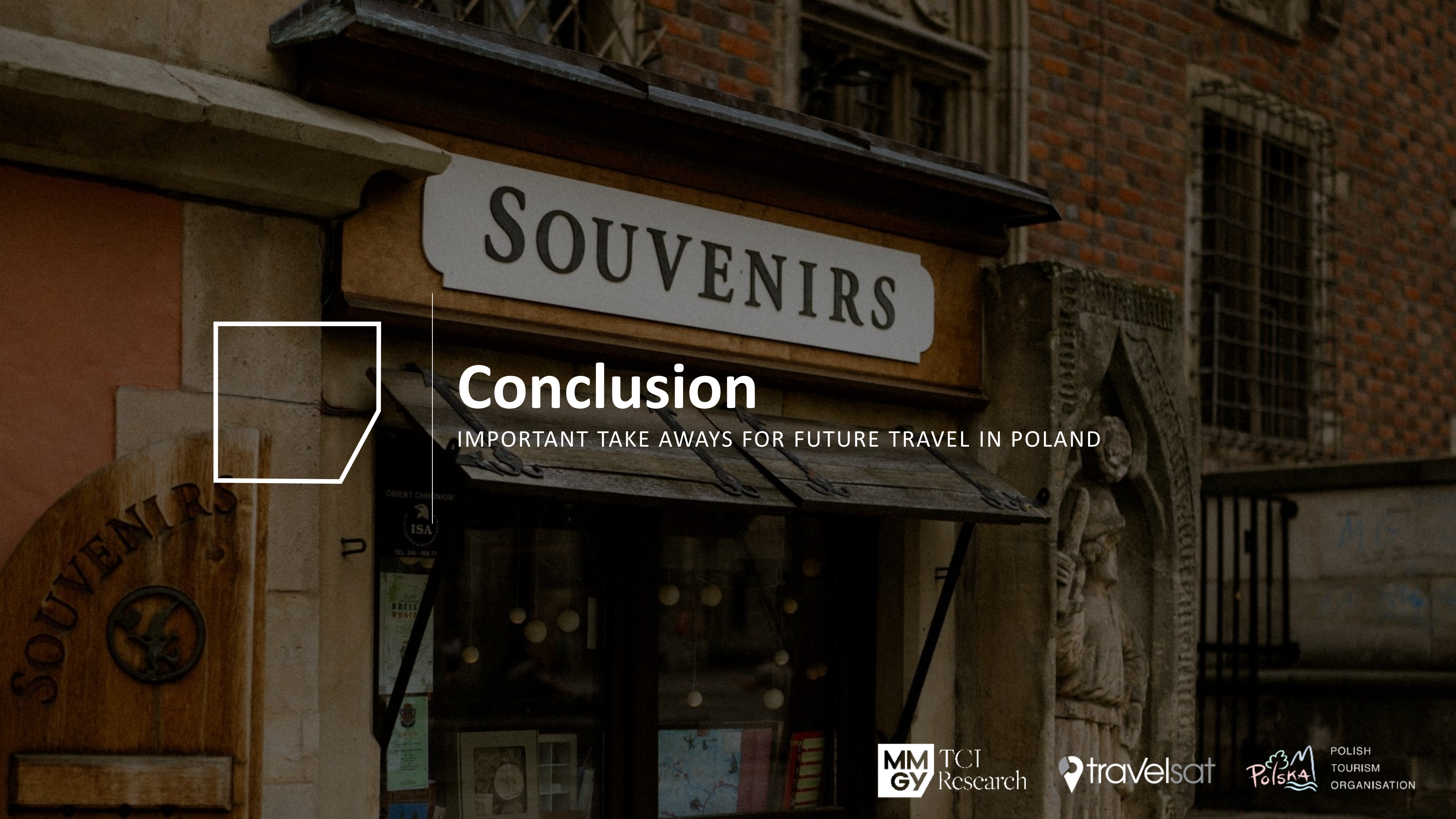


Period of analysis: January 1st, to October 15th, 2023. **Note**: The benchmark is composed of the European average. **Note**: Some experience categories have been merged for benchmarking purposes.

Note: The data presented here stems from ratings and reviews. For a full list of sources, please see appendix B.

Conclusion

IMPORTANT TAKE AWAYS FOR FUTURE TRAVEL IN POLAND



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Take Aways

SOUVENIRS FOR THE FUTURE OF TRAVEL IN POLAND

1. Poland's online social standing related to travel and culture **typically shows a highly positive polarisation**. However, the overall positivity in conversations on this topic in Poland is **slightly lower than the European average**. This is explained by the fact that many online discussions about travel and culture in Poland are **unintentionally influenced by the conflict in Ukraine**, given its proximity and the **associated political and safety concerns**.
2. When it comes to visitor experience, Poland's **overall rating is at par with the European average**, both in terms of **current scores**, as well as the **evolutions** seen when compared pre-COVID scores. Monthly patterns demonstrate that **visitor experience is rated highest during months where tourism pressure is likely lower**, such as winter or autumn.
3. Further deep diving into guests' written reviews, Poland shows **clear competitiveness across several key indicators**, such as **sanitary safety**, **sustainable travel**, and **value for money**. Factors such as **transport** options, **personnel**, and **location** of cultural experiences are **also well considered**. At the same time, there would seem to be **room for improvement** when it comes to the **accessibility of internet**, and the experience around **ticket offices** or **waiting lines**.
4. Breaking down scores by segments, visitors from **Ukraine**, **Israel**, and the **United Kingdom are notably the most satisfied**, attributing their positive experiences to **attraction facilities**, **personnel**, and **value for money**. Among various traveller types, **business travellers report the highest satisfaction**, taking the opportunity to **explore Poland's cultural offer in their off-time**. They emphasise positive interactions with **personnel** and a favourable perception of **value for money**. Overall, scores for different traveller compositions in Poland **consistently surpass or align with the European average**, with the exception of solo travellers.
5. Poland holds an **even mix of tourism areas** that can either be considered **reputation drivers** or **hidden gems**. The **Three Cities**, **Southern Poland**, **Warsaw**, and **Krakow** form the former group, whilst **Eastern Poland**, **Central Poland**, and the **Major Cities** the latter. While **Western** and **Southwest Poland** receive a relatively high number of reviews, their scores **merit some attention in terms of visitor satisfaction**. Northern Poland seems to be a less exposed area.
6. Finally, experience categories **broadly associated with tours or museums lead in absolute terms** of experience reputation. However, considering all categories' review volumes, **the majority can be seen as hidden gems**, holding several opportunities to become future reputation drivers. While there are some **clear motors of visitor satisfaction**, such as **Sites of Interest & History**, **World War II Tours**, and **Tours & Excursions**, a competitiveness analysis reveals that **Poland's strengths lie instead with experiences that are hidden gems** or that have been less exposed.

Period of analysis: January 1st, to October 15th, 2023. **Note**: The benchmark is composed of the European average.

Note: For a full list of sources, please see the annexes.

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