



The Małopolska brand image survey

Summary



Małopolska Regional
Development Observatory

Department
of Regional Policy

SUMMARY

The brand image survey was commissioned by the Małopolska region, and carried out by the consortium of Danae sp. z o.o. (Co. Ltd.) and Realizacja sp. z o.o. (Co. Ltd.) over the period of March through July 2018. A number of survey techniques were applied for data collection purposes: quantitative studies (CAPI, CATI) and qualitative studies (FGI, IDI).

Małopolska Brand: Tourism Dimension

- Małopolska is the unquestioned domestic leader as a tourist attraction.
- All researched groups – Poles in general, residents of the Małopolska region, tourists, and entrepreneurs – described the region as the most attractive tourist destination in Poland. Furthermore, the number of persons visiting Małopolska has been steadily increasing year to year.
- Quantitative research has confirmed hypotheses submitted in the course of analysing existing data with regard to the subsistence of two strong Małopolska sub-brands: (1) Cracow (referenced by 53% of surveyed Poles as their first association with the region) and (2) mountains as such (the response was spontaneous in case of 43% of Poles surveyed, Zakopane referenced by 31%).
- Quantitative research confirmed that the Małopolska brand is used differently by domestic and foreign tourists. Both secondary data and data acquired as part of proprietary research suggest that foreign tourists have a tendency to visit renowned and universally valued venues, such as Cracow, Wieliczka, or Zakopane. Conversely, domestic tourists avoid all the most popular locations noticeably more frequently than foreign visitors. The region is also a pilgrimage tourism leader.
- Tourist traffic is primarily generated by the region's greatest attractions: Cracow, Zakopane, Auschwitz. Expert panel participants pointed out that the related regional policy should include the objective of dispersing tourist traffic across the region (for foreign tourists in particular) to foster the region's brand rather than its most attractive sub-brands only.

Małopolska Brand: Social Dimension

- Both existent data and respondent perception yields an image of the Małopolska region as a living-friendly location, one of the best across Poland's residential map.
- Małopolska residents themselves are critically attached to their region, and would be reluctant to change their place of residence. Yet it is noteworthy that in the course



of qualitative interviews, residents of counties located at greater distances from the Cracow county did mention inconveniences arising from poor access to the labour market, education, and culture.

- Significant air pollution is a factor of negative impact on the regional brand image (40% of Małopolska region residents have described air quality in the region as poor or very poor).
- Smog apart, issues of insufficient road infrastructure and traffic jams have also been referenced in qualitative research. Furthermore, residents of Cracow have highlighted the need to share urban infrastructure with tourists, a factor they consider arduous and unfavourable to quality of life in the region's capital.
- In terms of access to the region's cultural events and labour market quality, residents of counties located at greater distances from the Cracovian county have pointed to the inferiority of these aspects locally in comparison with the region's capital.
- In terms of emotional reception, religiousness is a very typical and distinct Małopolska reference, in particular with regard to Pope John Paul II as the most well-known person of Małopolska origin.

Małopolska Brand: Business Dimension

- Małopolska is a dynamically developing region, hugely attractive in investment terms. Eighteen percent of entrepreneurs from across Poland and as many as 69% from Małopolska itself have described the region as the most attractive one business-wise.
- Persons engaging in business operations in the Małopolska region are particularly appreciative of the local manufacturing and office space offer, and the region's research and development infrastructure. Most of the Małopolska entrepreneurs surveyed (71%) would recommend engaging in business activities in their region.
- In terms of the business dimension, Małopolska is most frequently perceived through the prism of tourism as a field well developed in the region. Local and non-local businessmen have showcased the noteworthy development level of creative and leisure time industries.
- Małopolska businesses have also noted a considerably higher development level of the ICT-associated industry when contrasted with other regions. Expert panel participants have also listed the Business Process Outsourcing industry as flourishing in the city. Yet in the course of in-depth interviews (IDIs), experts emphasised that the region's image as based on tourism is currently not recognised as a support factor for businesses not associated with the tourist industry directly.
- Notably, the business community (especially that of Małopolska origin) considers a specific annual business event organised locally (the Economic Forum in Krynica-Zdrój) to be significant as well as recognisable.

Małopolska: Information and Promotional Activities

- Małopolska's new (graphic) logo is not commonly recognised by recipients. The nationwide recognition rate reaches a mere 13%. The logo's poor recognition rate (possibly affected by the relatively short period of its use) notwithstanding, it is generally regarded favourably.
- Małopolska's promotional campaigns are not as recognisable. Most respondents in all the groups surveyed cannot recall having come across any campaign (only 5% of nationwide survey respondents declared having encountered any of the campaigns launched).
- When it comes to sports and cultural events, Małopolska is primarily associated with the ski jumping world (39%). While other events have been recognised by respondents as well (mainly Tour de Pologne and the Festival of Jewish Culture in Cracow), the Ski Jumping World Cup in Zakopane proved to be the primary event referenced by all respondents.
- A significant part of Małopolska region residents (77%) are not aware that the Małopolska Marshal's Office is the authority responsible for promoting the region's brand.

Brand Perception in the Media

- Over 381,000 media materials were monitored in terms of the "Małopolska" slogan use for the analysed period, 80% and 10% each identified for the web, press, and radio and TV stations, respectively.
- Thirty-five per cent of analysed materials were published in nationwide media and sixty-five in regional.
- Regional media – the Dziennik Polski daily, www.gazetakrakowska.pl, www.dziennikpolski24.pl, Polish Radio Cracow and www.radiokrakow.pl – mentioned the Małopolska region most frequently.
- Of all media with a local focus, media from the Małopolska region published/ broadcast news relating to the analysed region most frequently, followed by media from the Silesian, Podkarpackie, Mazovian regions, respectively.
- Of all nationwide media, the following were identified as the most active: 1st Channel of the Polish Radio, www.tvn24.pl, www.polskatimes.pl, Polsat News, and www.glos24.pl.
- Of the 1,000 randomly selected publications from the analysed period, 59% focused on life quality and social issues in the Małopolska region, 22% – on economy, and 19% – on tourism in the region. Most frequently showcased topics of impact on the local residents' life involved infrastructure and environmental protection issues, smog the unquestioned leader.
- Of the 1,000 selected media materials, 68% were favourable in nature. Multiple investments and events were of importance to the result – such as the World Youth Day and the struggle against air pollution, placing Małopolska in the firm lead as a pioneer in the area.



- Only 14% of all materials struck a negative chord during the analysed period. Related publications concerned medical care service issues, charges of wastefulness or maladministration pointing to local government agencies, and incessant smog-related problems, numerous activities in the field notwithstanding.
- Fifty-five per cent of analysed materials reported on Małopolska as a region, without focus on a single specific location. Cracow was the dominant venue in the remaining part of media publications, closely followed by Zakopane.

Małopolska Brand: the Image

- The Małopolska brand usually evokes positive associations, in terms of emotion and functionality alike. In all three brand aspects – tourism, business, life quality – negative components are rare and have not taken over in overall brand perception.
- Smog remains the chief image problem of the region, listed as one of the first spontaneous associations with the brand by all respondent groups. Local residents were particularly negative: air pollution is a major factor in their experience with the region.
- Notably, the brand image is not perceived as a whole, but rather in the context of territorial sub-brands (Cracow and the Tatra mountains).
- The Małopolska brand is a leader in terms of tourist attractiveness. All target groups associate it mostly with landscape values and leisure time – the tourist as well as investor and local resident groups have identified the aspect as central to the experience, benefits, and image of the Małopolska region.

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