DESTINATION ATTRACTIVENESS OF SLOVAKIA: PERSPECTIVES OF DEMAND FROM MAJOR TOURISM SOURCE MARKETS

Kristína Pompurová, Ivana Šimočková

Introduction

According to World Travel & Tourism Council [12], in 2011, tourism generated 9.1% of global GDP and its total impact of 8.3% of world employment makes it the world's leading job sustainers with almost 255 million jobs created. Despite a considerable tourism potential of Slovakia, its economic benefits are significantly lower (tourism generated 6% of GDP and 5.8% of total employment, which ranks it at 71st place from 181 countries according to WTTC). Gúčik [2] conditions the improvement of the role of tourism, as a tool for economic, social and cultural development of state, by increase of its destination attractiveness. An analogous idea can also be found in the strategic documents of Slovak tourism (such as the New Tourism Development Strategy 2013 and the forthcoming Tourism Development Strategy for Slovakia until 2020). These documents draw attention to the increasing attractiveness of Slovakia that may lead to enhancement of its tourism competitiveness with a better use of its potential, balance of regional disparities and creation of new jobs.

The concept of destination attractiveness does not represent a new topic in scientific literature. On the contrary, a significant attention has been paid to this concept since the 1960s, however, a relatively long period of its research and examination did not result in a synthesizing evaluation platform but rather led to the fragmentation of researchers' views. Up to date, many authors try to identify the destination attractiveness and the factors influencing the decision-making process of visitors (selected target market) when evaluating a particular territory as a possible tourism destination. Since destination attractiveness depends not only on the characteristics of the territory and its inhabitants, but also on the features of each target market [8], the research focuses on their selection and differentiation.

The aim of this paper is to examine the attractiveness of Slovakia as a tourism destination in terms of demand of its major tourism source markets. Selected target market for examination of Slovakia's attractiveness was identified according to several criteria – (1) belonging to the priority target market of tourism as defined in the basic tourism policy documents of Slovakia, (2) similarity in terms of degree of international economic integration among countries, which determines the freedom of movement of persons and the removal of formalities when traveling, (3) an analogy in terms of living standards, which predetermines the travel intensity and stay of persons outside their habitual residence, respectively fulfilment of the vacation needs and (4) similarity in terms of tourism development degree (location, natural conditions and historical development), which is predominant in determining the population's decision-making between domestic and outbound tourism.

We examined Slovakia's attractiveness as a tourism destination on the example of its citizens, as well as residents of neighbouring Czech Republic, Hungary and Poland. Together, they form the Visegrad Four (V4) as a community of Central European countries, which supports mutually beneficial cooperation in various areas. In tourism, they seek to penetrate into distant markets through their joint marketing activities. However, in the European area V4 countries remain tourism competitors. In this context, we find it interesting to examine the ability of Slovakia to attract visitors from V4 countries, its destination attractiveness on this target market.

 DOI: 10.15240/tul/001/2014-3-006

1. Research Methodology

Whereas there several different literature approaches to the destination attractiveness assessment [9], in the paper, we focus on the Slovakia destination attractiveness examination in terms of demand that overcomes. First, we examine Slovakia's destination attractiveness in terms of Visegrad population demand by exploring the economic approach [9], which takes into account the satisfied demand. With regard to the information availability and the focus on selected target market, our research is based on the statistics 2000–2011, while we recognize its limitations (abstracting from one-day visitors, visitors staying at non-commercial accommodation facilities and illegally, multiple counting of visitors etc.). We focus on administrative units of Slovakia (regions). There is simply a large discrepancy [7] between tourism regions belonging to a group of purposefully created regions and the existing organizational structure of the public sector. Therefore the Statistical Office of the Slovak Republic does not follow them as territorial economic unit.

The most comprehensive indicator of destination attractiveness, which is offered by theory in relation to the economic approach, is the attractive destination index ATD [13]. However, we find it quite challenging as it assumes that the destination attractiveness increases with increasing distance. Furthermore, the ATD index is applicable only when comparing multiple target markets, or when comparing several tourism destinations visited by selected target market. It does not take into account the target market's size (its potential). For purpose of our research, we propose own coefficient (destination attractiveness coefficient) which exceeds all above-mentioned deficiencies and indicates what percentage of the target market total population visited the destination in question (DAC_1), or what proportion of them annually held an overnight stay in the destination DAC_2). The fact, that the coefficient does not take into consideration inhabitants of the target market who did not participate in tourism during the examined period (due to economic, health, family or other reasons) nor those who stayed at friends and relatives or those who were not accommodated in the destination at all (as they visited it during the sightseeing tour of several destinations) may be considered as limiting. However, we find the coefficient relevant as it compares the actual tourism destination visitation with potential visitation with regard to size of target market. The higher the values of the above-mentioned coefficients are, the more attractive the destination in question for the target market is. Coefficients can be calculated according to the following model:

$$DAC_1 = \frac{\sum NV_i}{\sum TMP_i}.100,\ DAC_2 = \frac{\sum NOS_i}{\sum TMP_i}.100, \quad (1)$$

where *DAC* is the destination attractiveness coefficient in terms of selected target markets satisfied demand,

NVi – number of destination visitors coming from the target market during the period i,

NOSi – number of over-night stays of the destination visitors coming from the target market during the period i,

TMPi – target market total population during the period i.

We assume that in foreign tourism, the target markets residents decide about the destination visit within sixty years (life expectancy in Europe is about 75 years, while up to the age of 15 the effective demand actually does not exist). If 100% of the selected emitting market population is about to visit the destination during this period, then it must be visited each year, on average, by 1.67% of target market's population (under ideal condition). With regard to the trend of shorter stays and according to our qualified estimation, the average number of nights spent is three nights (four stay days). Ideally, during the period of 60 years, every citizen of the emitting market should undertake three over-night stays at the destination (in the conversion during the period of 60 years, exactly 300% of the emitting market population should undertake just one over-night stay, i.e. 5% of the population is about to stay over-night in the destination on average per year). Verbal rating scale of the destination attractiveness according to satisfied demand of the Czech Republic, Hungary and Poland is represented in Table 1.

Tab. 1: Values interpretation of DAC_1 and DAC_2 destination attractiveness coefficients in terms of foreign emitting markets satisfied demand

Verbal rating of the destination attractiveness according to economic approach	Percentage value interval of DAC_1, DAC_2 indicators (under ideal conditions)	DAC_1 values in % (calculated from column 2 of the table under ideal conditions 1.67% of the population per year)	DAC_2 values in % (calculated from column 2 of the table under ideal conditions 5% of the population per year)
very unattractive	<0; 30)	$0 \leq DAC_1 < 0.50$	$0 \leq DAC_2 < 1.50$
unattractive	<30; 50)	$0.50 \leq DAC_1 < 0.84$	$1.50 \leq DAC_2 < 2.50$
attractive	<50; 70)	$0.84 \leq DAC_1 < 1.17$	$2.50 \leq DAC_2 < 3.50$
strongly attractive	<70; 90)	$1.17 \leq DAC_1 < 1.50$	$3.50 \leq DAC_2 < 4.50$
extremely attractive	<90; ∞)	$DAC_1 \leq 1.50$	$DAC_2 \leq 4.50$

Source: own elaboration

It is important to evaluate the domestic tourism satisfied demand in a different way. Taking into consideration the data for France, where the domestic tourism is, thanks to the government's support and national pride of the population, a long-term source of employment and income, every Slovak inhabitant should, according to our estimation, participate in domestic tourism on average five stay days annually (in France, each resident participates in domestic tourism more than three times on average, and the average length of stay is more than six days). The interpretation of the values of the destination attractiveness coefficients in terms of satisfied demand in domestic tourism can be found in Table 2.

Whereas individuals who find the destination attractive do not always become its visitors for economic, employment, family and other reasons, we considered it necessary to examine the attractiveness of Slovakia from the perceptual approach as well [9]. This approach takes into consideration potential demand, i.e. the perceived ability of the destination to satisfy specific vacation needs of respondents.

Tab. 2: Values interpretation of DAC_1 and DAC_2 destination attractiveness coefficients in terms of domestic tourism satisfied demand

Verbal rating of the destination attractiveness according to economic approach	Percentage value interval of DAC_1, DAC_2 indicators (under ideal conditions)	DAC_1 values in % (calculated from column 2 of the table under ideal conditions 100% of the population per year)	DAC_2 values in % (calculated from column 2 of the table under ideal conditions 400% of the population per year, resp. length of stay 4 nights)
very unattractive	<0; 30)	$0 \leq DAC_1 < 30$	$0 \leq DAC_2 < 120$
unattractive	<30; 50)	$30 \leq DAC_1 < 50$	$120 \leq DAC_2 < 200$
attractive	<50; 70)	$50 \leq DAC_1 < 70$	$200 \leq DAC_2 < 280$
strongly attractive	<70; 90)	$70 \leq DAC_1 < 90$	$280 \leq DAC_2 < 360$
extremely attractive	<90; ∞)	$DAC_1 \leq 90$	$DAC_2 \leq 360$

Source: own elaboration

The data necessary for evaluation of the perceived attractiveness of Slovakia was obtained by questionnaire survey undertaken from January 2011 to February 2012. The sample consisted of 674 individuals – 333 inhabitants of Slovakia, 118 inhabitants of the Czech Republic, 112 inhabitants of Hungary and 111 inhabitants of Poland; all respondents were over 15 and according to the Chi-square test, they fit the representative picture of the V4

countries population in terms of age (Sig. = 1.000 for Slovak respondents, 0.99 for Czech respondents, 0.75 for Hungarian respondents and 0.994 for Polish respondents) and sex (Sig. = 0.768 for Slovak respondents, 0.920 for Czech respondents, 0.764 for Hungarian respondents and 0.859 for Polish respondents). The final sample was obtained by selection from a total of 1,113 completed questionnaires.

Evaluation procedure of destination attractiveness according to the perceptual approach is most elaborated in scientific literature. We defined the attractiveness of Slovakia by a model used in the study of Hu and Ritchie [3, p. 29]. We added the attractiveness level indicator (LPA), which compares the attractiveness of the tourism destination with a hypothetical assessment of the ideal destination for a selected group of respondents.

Respondents were asked to identify the tourism destination criteria/attributes which mostly affect its attractiveness. Selected touristic attributes related to location, social preconditions, primary and secondary offer of the country were rated on a 5-point Likert scale (1-not at all important, 5-extremely important for its attractiveness). At the same time, they were asked to evaluate the ability of Slovakia to meet their vacation needs related to different attributes. The level of perceived attractiveness of Slovakia (LPA) is then expressed as followed:

$$LPA = \frac{A}{IDA}.100, \qquad (2)$$

where

LPA is the level of perceived attractiveness of the tourism destination,

A – destination attractiveness calculated by multiplying the attributes weights and the ability of Slovakia to meet the potential visitors needs associated with the attributes (according to the model of Hu and Ritchie [3]),

IDA – ideal destination attractiveness calculated by multiplying the attributes weights and maximum values of perceived ability of the destination to meet the needs of potential visitors to various attributes on selected rating scale.

The proportion reflects the extent to which the destination attractiveness corresponds to the hypothetical assessment of ideal destination for a selected group of respondents (while preserving individual attributes weights). Value indicator of the perceived attractiveness level of the destination is interpreted according to Table 3.

Tab. 3: Value interpretation of the destination attractiveness level

Verbal rating of the destination attractiveness	Percentage interval of the destination attractiveness level
very unattractive	<0; 30) = {LPA ⏐ 0 ≤ LPA < 30}
unattractive	<30; 50) = {LPA ⏐ 30 ≤ LPA < 50}
attractive	<50; 70) = {LPA ⏐ 50 ≤ LPA < 70}
strongly attractive	<70; 90) = {LPA ⏐ 70 ≤ LPA < 90}
extremely attractive	<90; ∞) = { LPA ≤ 90 }

Source: own elaboration

Obtained data were processed by mathematic-statistical methods using Excel and SPSS software. We chose the 5% significance level (α = 0.05), i.e. we interpreted the results of statistical testing with 95% probability.

2. Attractiveness of Slovakia in Terms of V4 Countries' Inhabitants Satisfied Demand

V4 countries visitors represent Slovakia's largest tourist group in a long-lasting period, which may be justified by target country's proximity, relatively good awareness of Slovakia as a tourism destination, friends and relatives living in Slovakia, but also by habit to travel to Slovakia in the context of previous limitations of the Eastern Bloc. Since 2000 to 2011, these visitors participated in Slovakia's visitation by almost 80%. Domestic residents (73.2%) significantly dominated the V4 countries tourists' territorial structure, followed by the Czechs (15.8%), Poles (7.9%) and Hungarians (3.1%).

The number of V4 countries tourists in Slovakia, except for the years 2003, 2004, 2009 and 2010, grew by 2.3% per year on average, which is only slightly less than the total number of tourists in Slovakia (2.6% growth). In 2011, compared to 2000, their number increased by almost a quarter (24.1%). Thus the attractiveness of Slovakia in terms of satisfied demand slightly increased.

We examined the dependence of the number of tourists' from the Czech Republic, Hungary and Poland on the exchange rate in the years 2000–2011. We took into account the SKK / CZK, SKK / HUF and SKK / PLN exchange rates, and since 2009 we converted their rate into euros (1 EUR = 30.126 SKK). To prove the dependence, we tested Pearson's correlation coefficient. While in the case of the Czech and Hungarian visitors we did not confirm the dependence (Sig. = 0.76, respectively Sig. = 0.13 ≥ 0.05), in the case of the Polish visitors, a moderate dependence was proved ($\chi^2 = 0.609$, Sig. = 0.022 < 0.05). With 95% probability, we can assume that with a stronger zloty the number of the Polish visitors in Slovakia is increasing. We underline the fact that the Polish visitors are sensitive to the price of services and destinations can attract them thanks to a suitable price policy.

During the examined period, V4 countries' tourists participated by 79.9% in the total number of nights spent in the Slovak accommodation facilities. The largest share of overnight stays belongs to the Slovaks (74%), followed by the Czechs, Poles and Hungarians. Permanent beds in accommodation facilities were used up to 19.1% (overall capacity utilization in 2000–2011 was 23.9%). Slovak tourists used it to 14.1%, Czech tourists to 3%, Hungarian tourists to 0.5% and Polish tourists to 1.5%.

In 2000–2011, the average length of stay of V4 countries' tourists was 4.3 days, which is identical with the total average length of stay of all tourists in Slovakia. On average, the highest number of stay-days was spent by domestic visitors (4.3) and the smallest number by Hungarian tourists (3.7). The V4 countries' tourists spent the longest time in Banská Bystrica region (4.9 days), Trnava region (4.9 days) and Prešov region (4.7 days). On the other hand they spent the shortest time in Bratislava region (3.1 days), which is traditionally visited in short-time tourism because of the capital (prolonged weekends, business tourism). According to the global trends, the average length of stay of V4 countries' tourists shortened during 2000–2011 up to one sixth (15.4%), which is less than nation-wide average (17.1%). As a result of bad economic situation, Hungarian visitors shortened their stays most significantly (up to 18.8%) and Czech visitors the least (up to 5.2%).

According to Pearson correlation coefficient, the length of stay in the Slovak accommodation facilities prolongs with strengthening national currencies of Czech residents ($\chi^2 = 0.58$, Sig. = 0.046 < 0.05), Hungarian residents ($\chi^2 = 0.88$, Sig. = 0.00 < 0.05) and Polish residents ($\chi^2 = 0.95$, Sig. = 0.00 < 0.05). The strongest correlation was noted in the case of Polish (significant influence of exchange rate on the number of tourists, number of over-night stays and length of stay), moderate correlation can be expressed in the case of Hungarians (influence on the number of over-night stays and length of stay) and the lowest correlation is observed among Czechs (influence on length of stay). We assume that Slovakia's attractiveness in terms of satisfied demand of these target markets is determined by the exchange rates.

If we take the target market size (number of V4 countries' inhabitants and therefore number of potential visitors of Slovakia coming from these target markets) into consideration, then we can assume that in 2000–2011 Slovakia was attractive to 4.3% of V4 countries inhabitants, who visited it once a year on average. And, at the same time, it was attractive to 14% of V4 countries inhabitants who spent one over-night stay in Slovakia on average. This means that every V4 countries' resident visits Slovakia once in 23 years on average or that in more than 7 years, the whole V4 population spends one over-night stay in Slovakia on average.

Tab. 4: Average values of DAC_1 attractiveness coefficient of Slovakia in terms of satisfied demand of V4 countries inhabitants

Year/ Territory	BSK	TTSK	TSK	NSK	ŽSK	BBSK	PSK	KSK	SR
2000	0.57	0.24	0.25	0.25	0.64	0.48	0.78	0.34	3.54
2001	0.62	0.29	0.30	0.28	0.75	0.55	0.92	0.37	4.07
2002	0.68	0.31	0.34	0.27	0.83	0.60	0.98	0.45	4.46
2003	0.67	0.30	0.35	0.28	0.85	0.58	0.90	0.41	4.34
2004	0.66	0.28	0.33	0.25	0.78	0.54	0.77	0.39	4.00
2005	0.69	0.28	0.33	0.28	0.84	0.56	0.78	0.40	4.16
2006	0.73	0.28	0.35	0.29	0.88	0.59	0.81	0.40	4.34
2007	0.77	0.29	0.39	0.29	0.94	0.59	0.88	0.43	4.57
2008	0.81	0.33	0.43	0.35	1.07	0.64	0.97	0.48	5.08
2009	0.70	0.26	0.37	0.33	0.89	0.52	0.79	0.39	4.26
2010	0.67	0.28	0.34	0.32	0.92	0.52	0.81	0.37	4.23
2011	0.74	0.29	0.33	0.30	1.01	0.52	0.82	0.38	4.39

Source: own elaboration based on Statistical Office of the Slovak Republic sources [14]

Note: BSK – Bratislava region, TTSK – Trnava region, TSK – Trenčín region, NSK – Nitra region, ŽSK – Žilina region, BBSK – Banská Bystrica region, PSK – Prešov region, KSK – Košice region, SR – Slovak Republic.

Tab. 5: Average values of DAC_2 attractiveness coefficient of Slovakia in terms of satisfied demand of V4 countries inhabitants

Year/ Territory	BSK	TTSK	TSK	NSK	ŽSK	BBSK	PSK	KSK	SR
2000	1.20	1.18	0.91	0.69	2.63	2.31	3.54	0.85	13.31
2001	1.23	1.16	1.03	0.83	2.94	2.38	3.88	0.91	14.35
2002	1.37	1.25	1.38	0.79	3.01	2.56	4.06	1.14	15.56
2003	1.41	1.27	1.45	0.86	3.02	2.52	3.74	1.02	15.29
2004	1.29	1.08	1.18	0.79	2.69	2.15	3.02	0.91	13.11
2005	1.52	1.01	1.12	0.75	2.78	1.97	2.72	0.91	12.78
2006	1.56	1.07	1.22	0.84	2.99	2.03	2.84	0.87	13.41
2007	1.61	1.08	1.40	0.82	3.18	2.07	2.96	0.94	14.06
2008	1.80	1.19	1.59	1.01	3.54	2.29	3.21	1.10	15.73
2009	1.56	0.97	1.41	0.89	2.96	1.95	2.71	0.87	13.32
2010	1.46	1.01	1.32	0.93	3.01	1.94	2.75	0.80	13.22
2011	1.58	1.00	1.24	0.85	3.12	1.95	2.75	0.79	13.29

Source: own elaboration based on Statistical Office of the Slovak Republic sources [14]

Note: BSK – Bratislava region, TTSK – Trnava region, TSK – Trenčín region, NSK – Nitra region, ŽSK – Žilina region, BBSK – Banská Bystrica region, PSK – Prešov region, KSK – Košice region, SR – Slovak Republic.

We compared obtained results to the results of sub-task of the scientific project VEGA 1/4572/07 „Theoretical and methodological aspects of tourism development under conditions of globalization and internationalization". The sub-task in question focused on the attractiveness evaluation of Slovakia as a tourism destination to the European Francophone countries. The comparison proved significant differences. In 2000–2008, Slovakia was attractive to less than 0.1% of Francophone states' residents who visited it per year on average, and only to 0.2% of such a target market inhabitants who spent one over-night stay per year [10]. The difference emerges from absenting general awareness about Slovakia as a tourism destination, higher distance, and insufficient information accessibility about the tourism destination, worse transport accessibility and the Francophone visitors' expectation of higher quality of tourism services.

The destination attractiveness of Slovakia in terms of satisfied demand is strongly differentiated in each target market. From this aspect, Slovakia is attractive to more than one third of domestic inhabitants who accommodated during the examined period in its territory (DAC_1=37.2). This means that on average every Slovak citizen participates in domestic tourism in 2.7 years. Despite such relatively positive values, we evaluate Slovakia in terms of domestic inhabitants' satisfied demand as unattractive according to the table 2 ($30 \leq DAC_1 < 50$).

As DAC_1 coefficient does not take into consideration the length of stay in a destination, which tells us a lot about the destination's attractiveness, and it does not pay attention to the multiple tourists counting neither (in the case of stays at several accommodation facilities), we find the DAC_2 coefficient more relevant when evaluating destination attractiveness in terms of satisfied demand. We take it as decisive (table 5).

When expressing the relation of the number of over-night stays of domestic tourists and number of inhabitants of Slovakia, we can assume that on average every citizen undertook more than one over-night stay in Slovakia per year (DAC_2=122.3). More than one fourth of Slovaks (26.7%) spent on average one night at the accommodation facilities in the region of Prešov per year, 22.7% of them in Banská Bystrica region and 22.3% in Žilina region. Even according to the DAC_2 coefficient, Slovakia as a tourism destination is unattractive in terms of domestic inhabitants' satisfied demand ($120 \leq DAC_2 < 200$). Therefore, it is necessary to increase domestic tourism demand. When following the premise about domestic tourism as source of foreign tourism development in state and when comparing current situation in Slovakia to the position of domestic tourism in the most visited country in the world (France), we have to argue in favour of every economic and non-economic tool of its support.

During the examined period, Slovakia remained extremely attractive to the Czech inhabitants ($DAC_1 \leq 1.50$, $DAC_2 \leq 4.50$). It was visited on average by 4.2% of Czech population per year (every Czech visits Slovakia in almost 24 years), and 13.6% undertook one over-night stay per year in Slovakia (100% of Czech population spend one over-night stay in Slovakia in 7.4 years).

In 2000- 2011, Slovakia was attractive only to 0.9% of Hungarian inhabitants, which proves its low attractiveness ($0.84 \leq DAC_1 < 1.17$). Every Hungarian visits Slovakia on average in 111 years. 2.3% of Hungarian population spent on average one over- night stay in Slovakia per year. According to more decisive DAC_2 coefficient, Slovakia is unattractive to Hungarian inhabitants in terms of satisfied demand ($1.50 \leq DAC_2 < 2.50$). On average, every Hungarian spends exactly one over-night stay in 43.5 years in Slovak territory.

In relation to the size of Polish population, Slovakia was attractive only to 0.6% of Poles who visited it on average per year in 2000–2011. Respectively, it was attractive to 1.8% of the inhabitants who spent an over-night stay per year in its territory. It is obvious that, on average, every Polish inhabitant visits Slovakia in 166.7 years or spends one over-night stay in 55.6 years. Slovakia is unattractive to the Polish visitors in terms of satisfied demand ($0.50 \leq DAC_1 < 0.84$; $1.50 \leq DAC_2 < 2.50$).

As proved by attractiveness evaluation of Slovakia from the point of view of Francophone states' inhabitants [10], the destination attractiveness in terms of satisfied demand does not have to match its subjective evaluation. In the following part of this paper, we evaluate the attractiveness of Slovakia perceived by V4 countries inhabitants.

Tab. 6: Attractiveness level of Slovakia in dependence on the respondents' country of origin in %

Attribute/ Values	Slovakia	Czech Republic	Hungary	Poland	V4
attributes relating to the destination location	*69.66*	*85.27*	*90.32*	*86.91*	*79.05*
thereof:					
- destination accessibility	66.72	84.53	86.43	85.32	75.94
- destination distance	73.46	85.99	94.42	90.86	82.62
attributes relating to the destination social preconditions	*62.97*	*69.09*	*70.09*	*75.79*	*67.71*
thereof:					
- safety of tourist and their possession	65.18	77.23	80.98	90.89	74.30
- price level	54.57	67.88	80.09	76.38	64.71
- national gastronomy	74.25	76.22	80.88	78.11	76.32
- local's attitude toward tourists	62.30	75.47	73.63	95.06	72.78
- ability of locals to communicate in visitors' language	89.98	79.03	65.55	85.53	83.86
- ability of locals to communicate in English	53.51	59.41	55.77	63.75	56.23
- ability of locals to communicate in German	46.57	53.87	58.26	60.31	51.10
destination primary offer attributes	*76.93*	*73.04*	*72.53*	*68.07*	*73.41*
thereof:					
- climate	73.61	67.65	81.34	79.37	75.26
- natural beauties	89.95	86.31	89.21	85.61	88.40
- historical attractions	79.67	74.90	68.82	62.32	75.01
- architectural monuments	84.11	79.73	74.96	68.29	79.60
- museums, cultural attractions	70.37	71.19	63.79	64.68	68.71
- organized events	67.94	69.27	60.71	66.24	66.73
- uniqueness of local people's life	66.15	66.74	76.03	70.49	68.65
destination secondary offer attributes	*64.54*	*69.95*	*71.13*	78.08	*68.90*
thereof:					
- information accessibility	58.44	73.81	71.84	77.26	66.15
- transportation infrastructure	52.94	69.95	69.64	71.73	61.73
- shopping opportunities	64.56	67.40	72.43	71.42	68.25
- sport and recreational opportunities and activities	71.57	75.34	81.84	90.56	77.65
- theme parks, aqua parks	69.83	70.24	69.18	86.65	72.90
- entertainments	64.83	65.10	64.47	64.31	64.34
- accommodations	68.93	71.07	74.55	86.41	73.41
- restaurants	67.86	71.05	74.75	86.49	72.62
Total	*68.70*	*71.59*	*72.61*	*74.75*	*70.29*

Source: own elaboration

3. Perceived Attractiveness of Slovakia from the Point of View of V4 Countries Inhabitants

In the next step of the research, V4 countries respondents were asked to evaluate the attributes affecting destination attractiveness. According to Friedman and Wilcox test, there is no significant difference between the first two groups of attributes (location, secondary offer). A difference was statistically confirmed only between the attributes on the third (primary offer) and the fourth place (social preconditions). The results of primary research, as well as the results of the attractiveness evaluation of Slovakia for the French-speaking population [10], confirmed the premise of a wider impact of the tourism destination location than of the primary offer on the territory attractiveness [4].

According to the respondents, Slovakia is widely capable to satisfy their needs related to location (distance and transport accessibility) and primary offer, while it is less capable to satisfy their needs related to secondary offer and social preconditions. Taking into consideration the importance of each attribute and the evaluation of Slovakia's ability to meet potential visitors' needs related to these attributes, we propose that in contrary to general acknowledgement of low quality services, what appears to be most attractive in Slovakia is the secondary offer, followed by location, primary offer and social preconditions of the country (Table 6). The ranking is influenced by domestic inhabitants' evaluations. The requirements of the other V4 countries respondents are fulfilled by Slovakia's location as a tourism destination, or its proximity and transport accessibility. Despite strong associations of Slovakia to natural beauties, Polish respondents are not satisfied with country's primary offer.

According to Friedman and Wilcox tests, relatively most attractive within each criteria are (1) natural beauties of Slovakia (geomorphological conditions, fauna and flora, lakes and rivers proximity, mineral and thermal springs, waterfalls, caves etc.) followed by (2) sport-recreational facilities and, architectonical monuments, accommodation facilities, transport accessibility of the country, or each tourism centre and safety of visitors and their propriety which attend the second place together. Furthermore, according to Rapacz [11] we can define Slovakia as a universally attractive tourism destination with general natural, cultural and infrastructure preconditions attractive to visitors and appropriate for development of various types of tourism (recreational, sport-adventurous, cultural, etc.).

On the other hand V4 countries potential visitors are not satisfied with shopping opportunities, entertainment and social services facilities, and with the capability of locals to communicate in foreign language (English and German). This may result from the respondents' ability to communicate with the locals in their mother tongue (proximity of Slavic languages, numerous Hungarian national minority living in Slovakia). In comparison to the results of project VEGA 1/4572/07 sub-task, we underline the fact that Slovakia is most unattractive to Francophone visitors in terms of destination information accessibility.

With reliability of 95%, we can presume that the citizens of V4 countries perceive Slovakia's attractiveness between 69.7% and 71 %, which, according to table 3, represents the existing or strong attractiveness. As the results of project VEGA 1/4572/07 sub-task proved attractiveness of Slovakia (attractiveness level of 57.2%) [10], we can assume that a negative correlation exists between geographic distance and perceived attractiveness of a destination.

We can observe little differences among citizens of each V4 country. A low dependence between the country of origin and perceived attractiveness of Slovakia as a tourism destination was proved by Spearman coefficient ($r=-0.15$, $Sig.=0.00<0.05$).

With reliability of 95%, Slovak visitors perceive their own country's attractiveness between 67.3% and 69.1%, which reflects an existing attractiveness. Czech inhabitants evaluate it between 69.5% and 72.7% (from attractive to strongly attractive) and according to Hungarian inhabitants, Slovakia's destination attractiveness level is between 70.3% and 73.7% (strong attractiveness). Evidently, Slovakia remains the most attractive to Polish inhabitants, who find it extremely attractive (destination attractiveness level between 72.3% and 75.8%). When comparing the results for each V4 country (average destination attractiveness level is equivalent to 70.3%), it is obvious that domestic inhabitants evaluate Slovakia's destination attractiveness the worst.

We examined the dependence of perceived destination attractiveness on existing family liaisons and friends living in Slovakia separately for Czech, Hungarian and Polish respondents. However, Spearman coefficient did not prove such a dependence (Sig.=0.165≥0.05). Thus, we cannot prove that the perceived attractiveness of Slovakia is influenced by the emotional ties to this country.

Conclusion

We examined Slovakia's destination attractiveness in terms of satisfied and potential demand. The inhabitants of Slovakia, Hungary and Poland find Slovakia much more attractive from the point of view of perceived destination attractiveness than in terms of satisfied demand attractiveness. Thus, there is a large gap for visitation increase, but also for perception improvement of Slovakia as a tourism destination. In the case of Czech market, the attractiveness of Slovakia in terms of satisfied demand is very strong, and it is necessary to maintain this positive fact. In this connection the innovations oriented to the respect of cultural differences may be decisive [1].

Attractiveness evaluation of Slovakia in terms of selected target market (which contributes to Slovakia's visitation up to 80%) and its further comparison with the sub-task results of VEGA 1/4572/07 project "Theoretical and methodological aspects of tourism development under conditions of globalization and internationalization" evaluating the attractiveness of Slovakia as a tourism destination for European Francophone countries, leads us to formulate the following generalizations:

- Without broad general awareness and created image of a unique tourism destination, the destination attractiveness decreases with increasing distance from the target market.
- The destination attractiveness remains identical in terms of supply and demand for the target market with relatively good general knowledge of the tourism destination; however, in case of a less well-known destination this is not valid.
- Destination location has a greater impact on its attractiveness than its tourism primary offer.
- Slovakia as a tourism destination holds universal attractiveness; it is likely to meet visitors' diverse needs associated with various types of tourism.
- Destination attractiveness in terms of satisfied demand is affected by economic factors.
- Increase of tourism destination visitation (namely its attractiveness in terms of satisfied demand) and related achievement of positive economic effects, is conditioned by favourable destination perception of selected target market.
- Destination attractiveness of Slovakia in terms of visitors' satisfied demand can be increased thanks to tourism offer adaptation and its presentation to the demand side.

The research results are a part of the carrying-on of the project "VEGA 1/0810/13 Preconditions for concept application of the socially responsible behavior in tourism in Slovak Republic." which is supported by the scientific grant agency of Ministry of Education, Science, Research and Sport of the Slovak Republic.

References

[1] BRUNET-THORTON, R., BUREŠ, V. Cross-cultural management: Establishing a Czech benchmark. *E+M Ekonomie a Management.* 2012, Vol. 15, No. 3, pp. 46-62. ISSN 1212-3609.

[2] GÚČIK, M. Cestovný ruch v regionálnom rozvoji. In GÚČIK, M. et al. *Manažment cieľového miesta cestovného ruchu.* Knižnica cestovného ruchu 21. Banská Bystrica: Slovak-Swiss Tourism, 2012. ISBN 978-80-8141-025-3.

[3] HU, Y., RITCHIE, B.J.R. Mesuring destination attractiveness. A contextual approach. *Journal of Travel Research.* 1983, Vol. 32, No. 2, pp. 25-34. ISSN 0047-2875.

[4] KOPŠO, E. et al. *Geografia cestovného ruchu.* Bratislava: Slovenské pedagogické nakladateľstvo, 1992. ISBN 80-08-00346-4.

[5] KOTLER, P., BOWEN, J., MAKENS, J. *Marketing for hospitality and tourism.* 3rd ed. New Jersey: Pearson Education International, 2003. ISBN 0-13-120057-7.

[6] KROGMANN, A. Katedra geografie a regionálneho rozvoja. Fakulta prírodných vied Univerzity Konštantina Filozofa v Nitre. 27-28. októbra 2009.

[7] KUČEROVÁ, J., MAKOVNÍK, T. Regional tourism policy in Slovakia. *E+M Ekonomie a Management.* 2009, Vol. 12, Iss. 1, pp. 6-13. ISSN 1212-3609.

[8] MARROCU, E., PACI, R. Different tourists to different destinations. Evidence from spatial interaction models. *Tourism Management*. 2013, Vol. 39, No. 6, pp. 71-83. ISSN 0261-5177.
[9] POMPUROVÁ, K. Atraktívnosť Slovenska pre vybraný segment návštevníkov. *E+M Ekonomie a Management.* 2011, Vol. 14, No. 2, pp. 137-150. ISSN 1212-3609.
[10] POMPUROVÁ, K. Atraktívnosť Slovenska v cestovnom ruchu pre obyvateľov Belgicka, Francúzska, Luxemburska a Švajčiarska. In *Folia turistica 1. Zborník vedeckých prác.* Banská Bystrica: Slovak-Swiss Tourism, 2010. pp. 171-184. ISBN 978-80-89090-77-8.
[11] RAPACZ, A. The impact of innovation on establishing selected Lower Silesian tourist destinations attractiveness. In *Folia Turistica 2. Zborník vedeckých prác.* Banská Bystrica: UMB-Ekonomická fakulta, 2012. pp. 311-317. ISBN 978-80-557-0351-0.
[12] Travel & tourism economic impact 2012. Slovakia [online]. World Travel & Tourism Council, 2013 [cit. 2012-06-11]. 24 p. (PDF). Available from: http://www.wttc.org/site_media/uploads/downloads/slovakia2012.pdf.
[13] VANÍČEK, J. *Marketingový výzkum a měření atraktivity turistické destinace* [online]. Praha: Česká marketingová společnost, 2007 [cit. 2009-02-23]. Available from: http://www.mandk.cz/view.php?cisloclanku=2007010009.
[14] *Visitors in tourism accommodation establishments in the Slovak Republic by regions.* Unpublished information of Statistical Office of the Slovak Republic from the period of years 2000–2011. Bartislava: Statistical Office of the Slovak Republic, 2012.

Ing. Kristína Pompurová, PhD.
Matej Bel University
Faculty of Economics
Department of Tourism and Hospitality
kristina.pompurova@umb.sk

Mgr. Ivana Šimočková
Matej Bel University
Faculty of Economics
Department of Tourism and Hospitality
ivana.simockova@umb.sk

Abstract

DESTINATION ATTRACTIVENESS OF SLOVAKIA: PERSPECTIVES OF DEMAND FROM MAJOR TOURISM SOURCE MARKETS

Kristína Pompurová, Ivana Šimočková

The destination attractiveness is an expression of territory attractiveness in relation to the decision-making process of its visitors. It plays a key role in determination of destination's competitive advantage; subsequently it influences the economic effects resulting from goods and services consumption in its territory. In scientific literature a significant attention has been paid to this concept for several decades.

The aim of this paper was to examine destination attractiveness of Slovakia in terms of the most important tourism source markets demand – Visegrad countries' inhabitants, representing 80% share of the overall visitation of Slovakia.

The attractiveness analysis results in terms of satisfied demand suggest that Slovakia is attractive to 4% of the V4 countries' population who visit it on average once a year, that is, to 14% of the V4 countries' population, who undertake one over-night stay per year on average. Slovakia is extremely attractive to the Czechs thanks to its proximity, common political history and non-existing language barrier; however, it remains unattractive to other V4 countries inhabitants.

In terms of potential demand, Slovakia meets the ideal destination expectations of 70–71% of V4 countries population, which means it is strongly attractive to them. The Poles find it the most attractive while Hungarian and Czech residents find it less attractive. Slovakia's own inhabitants appreciate this tourism destination the least. They particularly criticize lack of quality services, negative attitude toward customers and high prices which do not correspond with the quality of services. Slovak respondents find the natural beauties of their own country most attractive. Such an evaluation is common for the Czech and Hungarian respondents too. According to the Polish respondents, the most attractive in Slovakia is the positive attitude of local population. They evaluate sports and recreational facilities and activities extremely positively.

The inhabitants of Slovakia, Hungary and Poland find Slovakia much more attractive from the point of view of perceived destination attractiveness than in terms of satisfied demand attractiveness. Thus, there is a large gap for visitation increase, but also for perception improvement of Slovakia as a tourism destination. In the case of the Czech market, the attractiveness of Slovakia in terms of satisfied demand is very strong, and it is necessary to maintain this positive fact. In this connection the innovations and their promotion on relevant markets may be decisive. And thus the position of tourism as a tool for economic, social and cultural development of the country can be enhanced.

Key Words: *Destination attractiveness, demand, V4 Group countries, Slovakia.*

JEL Classification: *L83, M31, D7.*

DOI: *10.15240/tul/001/2014-3-006*