



POLAND
CONVENTION
BUREAU



POLISH
TOURISM
ORGANISATION

POLAND MEETINGS AND EVENTS INDUSTRY

REPORT 2020

 www.pot.gov.pl

Dear Reader,

I am pleased to present the eleventh edition of *Poland Meetings and Events Industry Report*, an overview of the meetings industry's last year achievements and its contribution to the growth of Poland's economy. Introducing the latest edition of the report, we would like to thank the ten municipal and regional convention bureaux that joined the initiative of collecting data and participated in compiling city portfolios. Thanks are also due to recommended congress and incentive organisers submitting data examined in the section analysing meetings and events staged in 2019.



Recent months transformed the state of business meetings worldwide. There are ongoing efforts dedicated to analysing operations in the new reality. The situation in particular cities and regions is subject to continuous monitoring by municipal and regional convention bureaux. Supported by Poland Convention Bureau - Polish Tourism Organisation (PCB POT), the latter implement new solutions intent to keep meeting planners interested in destinations and collaborate with organisers and venues on maintaining and securing new events for the involved cities.

In mid-May PCB POT launched communication centred on *#PolandOnlineSiteInspection*, a brand-new tool for the meetings industry. Available at pot.gov.pl, it acts as a catalogue for planning meetings and events in Poland. Greater emphasis is now placed on smaller domestic events with more stringent requirements related to hygiene standards and social distancing and on increasingly superior virtual and hybrid events.

Starting with early June, accommodation establishments are able to join the *Hygienically safe venue* programme. To guarantee business travellers, meetings and events customers and professional congress organisers access to information about venues capable of delivering services in accordance with Chief Sanitary Inspectorate's regulations, Polish Tourism Organisation kicked off the *Safe MICE venue* programme targeted at all Poland-based providers of services related to planning trade shows, exhibitions and congresses.

A study on *The Impact of Coronavirus on Europe's Convention Sector* is a result of cooperation with the Strategic Alliance of the National Convention Bureaux of Europe, of which PCB POT is a member. Prepared by Oxford Economics and partially presented in this very report, the analysis was based on data annually collected for successive editions of *Poland Meetings and Events Industry Report* and aggregated data from the GTS Tourism Economics database.

Even though the past few months were not particularly successful for the meetings industry, I firmly believe that in the years to come we will manage to win back our pre-pandemic achievements.

Wishing you a pleasant read and many successes in securing and planning meetings and events in Poland.

A handwritten signature in blue ink, appearing to read 'R. Andrzejczyk'.

Robert Andrzejczyk
President of Polish Tourism Organisation
together with the editorial team

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INTRODUCTION

The main objective of the 2020 Poland Meetings & Events Industry Report is to paint an optimally full picture of the 2019 situation in Poland's meetings and events sector.

Last year's condition of the sector is presented on the basis of data obtained from three sources:

- chapter 1 – data made available by international organisations and associations (ICCA and UIA),
- chapter 4 – data collected by municipal and regional convention bureaux ("domestic research"),
- chapter 5 – data submitted by professional congress organisers and incentive travel companies (PCOs and ITCs) recommended by the Polish Tourism Organisation.

Despite this broad spectrum, the three perspectives do not guarantee a complete overview. Data discussed in this year's report, similarly to previous editions, neither constitutes an exhaustive description of all events nor is the outcome of sampling-based research that would make it possible to generalise the results on a nationwide scale.

The core content of this year's report is complemented by information on the latest research results on economic impact of Poland's events industry and - in response to the situation in 2020 - a presentation of three possible scenarios for the meetings sector to recover from the crisis caused by the COVID-19 pandemic.

The report was developed by a team of Polish Tourism Organisation employees headed by Teresa Buczak:

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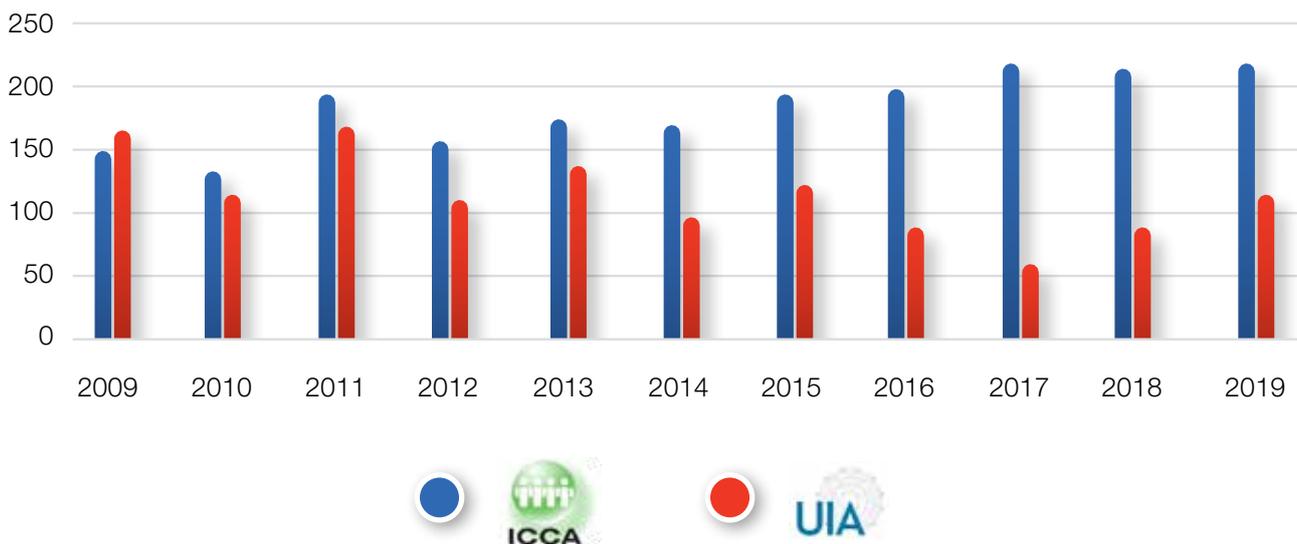
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1

POLAND IN THE ICCA AND UIA RANKINGS

The International Congress and Convention Association (**ICCA**) and the Union of International Associations (**UIA**) are the two most important international organisations which conduct statistical studies on staged and planned business meetings. For many years now Poland has been maintaining a stable position in their rankings. In [ICCA ranking](#) Poland is the only Visegrád Group member state to be ranked in the top twenty; in [UIA ranking](#) Poland recorded an increase compared to the previous year. The Polish Tourism Organisation has been a member of the ICCA since the 2002 launch of the Poland Convention Bureau as part of its structures, and joined the UIA in 2011.

Number of meetings held in Poland according to ICCA and UIA statistics for 2009-2019



The **UIA** is a research institute and documentation centre that for more than 100 years has been collecting and submitting information about the market for international meetings of non-governmental associations and intergovernmental organisations plus development directions and trends. Its International Meeting Statistics Report ranking is based on collected data about international meetings that simultaneously match the following four criteria:

- they last at least three days,
- they gather at least 300 participants,
- at least five nationalities are represented,
- at least 40% of the participants are from countries other than the host country.

The **ICCA** operates in close to 100 countries worldwide and represents more than 1,100 companies and organisations connected with the development and coordination of meetings, transportation and accommodation. For more than 50 years it has been collecting and analysing data plus creating communication channels in the field of implementing international business meetings. On the basis of this data, it prepares the annual ICCA Statistics Report Country & City Rankings whose outcome encompasses meetings that simultaneously match the following three criteria:

- they are held on a regular basis,
- they have at least 50 delegates,
- they rotate among at least three countries.

2

POLAND EVENTS IMPACT

WPŁYW EKONOMICZNY PRZEMYSŁU SPOTKAŃ NA GOSPODARKĘ POLSKI **POLAND EVENTS IMPACT 2020** THE ECONOMIC IMPACT OF POLAND'S EVENTS INDUSTRY



1.5%

szacunkowy wkład przemysłu spotkań w PKB
meetings industry's estimated contribution to GDP



35 BILLION PLN

wkład spotkań i wydarzeń w gospodarkę Polski w 2019 r.
meetings and events' 2019 contribution to the Polish economy



16,300,000

liczba uczestników spotkań i wydarzeń z kraju i zagranicy
number of domestic and international participations of meetings and events



220,000

wkład przemysłu spotkań w tworzenie miejsc pracy
meetings industry's employment contribution

www.celuchconsulting.com

REALIZACJA PROJEKTU:

CELUCH
CONSULTING

PARTNERZY:

[2] factor
Smart Hospitality

VISTULA

UNIWERSYTET
NICOLAUS COPERNICUS
W TORUNIU
Nicolaus Copernicus
University

In January 2020 the pilot study on meetings sector's economic impact was conducted as part of the Poland Events Impact project; next stages are planned for autumn 2020.

The data were analysed together by representatives of the academic community (Nicolaus Copernicus University in Toruń, Vistula School of Hospitality in Warsaw) and industry professionals (Celuch Consulting, Z-factor).

The research involved 90 meeting planners and 125 venue managers. The compiled results are based on data on 42,349 events staged in 2019 and an econometric model applying data of Statistics Poland and the Z-factor company, developed specifically for the purpose of defining the meetings sector's impact on national economy.

The study represents Poland's second attempt at defining the economic benefits resulting from event planning. [Poland Meetings Impact](#), Poland's first report on the economic impact of the meetings industry, was developed back in 2015 under the auspices of MPI Foundation, Polish Tourism Organisation and MPI Poland.

3 RESEARCH METHODOLOGY

For the purposes of this year's report, municipal and regional convention bureaux submitted information about 24,456 meetings and events held in 2019 and attended by 50 participants or more – over 2,000 events more than in the case of data presented a year earlier in the 2019 Poland Meetings & Events Industry Report.

Information on events within the scope of operations of municipal and regional convention bureaux was collected in two different ways. The majority of bureaux obtained data directly from venues (including hotels, conference/trade show centres, academies of higher learning and cultural centres renting rooms, historical venues: castles, palaces, manor houses), applying a standardised questionnaire sheet developed specially for the report. The sheet was used to track information about, among other things, an event's host venue, character, duration and number of participants of particular meetings, and the origin of delegates. Two bureaux (Warsaw and Lublin) submitted data collected by an intermediary (the Z-Factor company) - in this case, information about the origin of groups (domestic or foreign) is missing.

The 2020 Poland Meetings and Events Industry Report presents data about events staged for a minimum of 50 participants. While the manner in which the domestic research was conducted, with municipal and regional convention bureaux collecting data about events, makes it possible to see the state of Poland's meetings industry in a broad perspective, we should remember we are not dealing with a comprehensive view of the sector on a nationwide scale. The analyses whose results are discussed in this section were carried out on the basis of data on 24,456 meetings and events held in 2019; they represent neither full population sampling (all events) nor random sampling (a representative selection of meetings and events). There are also other obstacles making it difficult to provide a comprehensive picture of the meetings and events industry in Poland, including incomparable areas in which particular municipal and regional convention bureaux operate (city only, region only, both) and the fact that not all of them submit data for the report (10 out of 11 convention bureaux this year).

As in previous years, meetings were divided into three groups, whose classification applied the definitions below:

- **“conference/congress”** means domestic and international meetings of associations, with no clear division into governmental and non-governmental meetings;
- **“corporate event”** means company events with particular emphasis on training sessions, workshops, seminars, press conferences, product launches and incentives, including travels and incentive trips focused on the reward and recognition aspect;
- **“trade show”** means large-scale events on any subject, usually staged at exhibition centres.

Similarly to earlier editions of the report, the breakdown of meetings from the viewpoint of differences related to sectors and subject matter is based on the following categories:

1. **economics and politics** – meetings and events related to economics, politics, finance, management science, commodity science;
2. **trade and services** – meetings and events related to satisfying immediate human needs; their results usually do not assume a material form or directly generate new goods (transportation services, services aimed at industry and farming, municipal and housing services, legal counselling, services connected with education and learning, culture and art, financial and insurance institutions, as well as other personal services, such as hairdressing and photo services);
3. **humanities** – meetings and events related to culture and art (history of art, philology, musicology, ethics, philosophy) and society (history, archaeology, sociology, psychology, economics, anthropology);

4. **IT and communications** – meetings and events related to the academic and technical discipline studying information processing, including: information processing technologies, production technologies for information-processing systems, as well as communication systems, communication and its derivatives;
5. **medicine** – meetings and events related to medical sciences, including: stomatology, pharmaceuticals, public health, physical therapy, laboratory diagnostics, health technology, medical biology, biogerontology;
6. **technology** – meetings and events related to architecture and urban planning, automatic control and robotics, biocybernetics, construction, electronics, electrical engineering, geodesy and cartography, mining, engineering, chemical technology, transportation.

4

MEETINGS AND EVENTS IN POLAND IN 2019

CONFERENCES AND CONGRESSES



51%

conferences and congresses



2,031,589

participants

INDUSTRY BREAKDOWN



32%

trade and services



23%

humanities



16%

medicine



13%

economics and politics



10%

technology

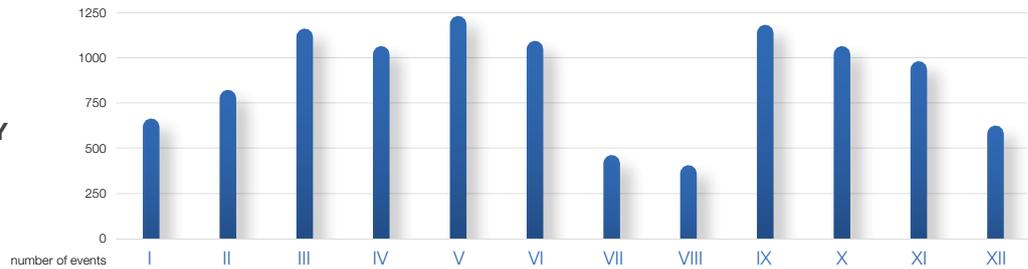


6%

IT and communications



SEASONALITY



GROUP ORIGIN



85%

domestic

15%

foreign

TYPE OF GROUP



65%

companies



20%

governmental institutions and public organisations



15%

associations and non-profit organisations



DURATION OF EVENTS

71% 1 day

25% 2-3 days

4% 4 and more days

1.5 days average duration of events

TYPES OF VENUES HOSTING EVENTS



65%

hotels



16%

venues and halls for special events



10%

high schools



9%

exhibition and congress centers

CORPORATE AND INCENTIVE EVENTS



45%

corporate and incentive events



1,441,415

participants

INDUSTRY BREAKDOWN



37%

trade and services



15%

technology



14%

medicine



14%

economics and politics



12%

humanities



8%

IT and communications



SEASONALITY



GROUP ORIGIN



90%

domestic

10%

foreign

TYPE OF GROUP



85%

companies



8%

associations and non-profit organisations



7%

governmental institutions and public organisations



DURATION OF EVENTS

68% 1 day

27% 2-3 days

5% 4 and more days

1.5 days average duration of events

TYPES OF VENUES HOSTING EVENTS



83%

hotels



11%

venues and halls for special events



4%

exhibition and congress centers



2%

high schools

TRADE SHOWS



4%

trade shows



4,054,627

participants

INDUSTRY BREAKDOWN



51%

trade and services



25%

humanities



12%

technology



6%

medicine



3%

IT and communications



3%

economics and politics



SEASONALITY



GROUP ORIGIN



93%

domestic

7%

foreign

TYPE OF GROUP



77%

companies



15%

associations and non-profit organisations



8%

governmental institutions and public organisations



DURATION OF EVENTS

48% 1 day

40% 2-3 days

12% 4 and more days

2.3 days average duration of events

TYPES OF VENUES HOSTING EVENTS



52%

exhibition and congress centers



24%

hotels



20%

venues and halls for special events



4%

high schools

ANALYSIS OF EVENTS IN CITIES



GDAŃSK
CONVENTION BUREAU
www.visitgdansk.com/convention



BYDGOSZCZ
CONVENTION BUREAU
www.visitbydgoszcz.pl



TORUŃ
CONVENTION BUREAU
www.convention.torun.pl



POZNAŃ
CONVENTION BUREAU
www.poznan.travel



CONVENTION BUREAU
MASURIA
www.konferencjemazury.com



WARSAW
CONVENTION BUREAU
www.warsawconvention.pl



POLAND
CONVENTION BUREAU
www.pot.gov.pl



LUBELSKIE
CONVENTION BUREAU
www.lubconvention.pl

Convention Bureau **Wrocław**
CONVENTION BUREAU
WROCLAW
www.convention.wroclaw.pl



CONVENTION BUREAU
KATOWICE
www.convention.katowice.eu



KRAKÓW
CONVENTION BUREAU
www.convention.krakow.pl



ŁÓDŹ
CONVENTION BUREAU
www.lodz.travel

BYDGOSZCZ

In Bydgoszcz you will effortlessly stage small and medium-sized events in the charming city centre right next to the river. Superbly equipped hotels with conference facilities plus the nearby Opera Nova congress centre will make holding a training session, a conference or an evening gala a real pleasure.



NUMBER OF EVENTS



565

events reported by
Bydgoszcz Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



174,500

total number
of participants



310

average number
of participants
per event

TYPE OF EVENTS



54%

conferences and
congresses



38%

corporate and
incentive events



8%

trade shows

INDUSTRY BREAKDOWN



43%

trade and
services



18%

medicine



13%

economics and
politics



13%

humanities



7%

IT and
communications

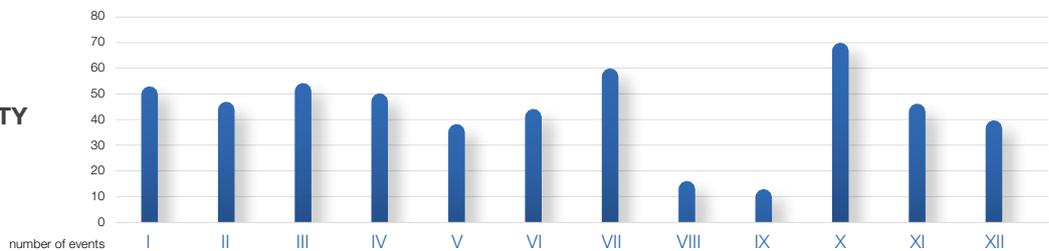


6%

technology



SEASONALITY



GROUP ORIGIN



95%

domestic

5%

foreign

TYPE OF GROUP



60%

companies



21%

governmental institutions
and public organisations



19%

associations and
non-profit organisations



DURATION OF EVENTS

82%

1 day

16%

2-3 days

2%

4 and more days

1.3 days

average duration of events

TYPES OF VENUES HOSTING EVENTS



56%

hotels



27%

venues and
halls for
special events



17%

exhibition
and
congress centers

GDAŃSK

Thousands of meetings hosted each year, diverse accommodation infrastructure and a great offer of additional highlights for conference delegates make Gdańsk a true centre of meetings, with the Gdańsk Convention Bureau providing assistance in the organisation of even the most challenging events.



NUMBER OF EVENTS



2,551

events reported by
Gdańsk Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



677,085

total number
of participants



266

average number
of participants
per event

TYPE OF EVENTS



65%

conferences and
congresses



27%

corporate and
incentive events



8%

trade shows

INDUSTRY BREAKDOWN



32%

trade and
services



26%

humanities



14%

economics and
politics



12%

medicine



8%

IT and
communications

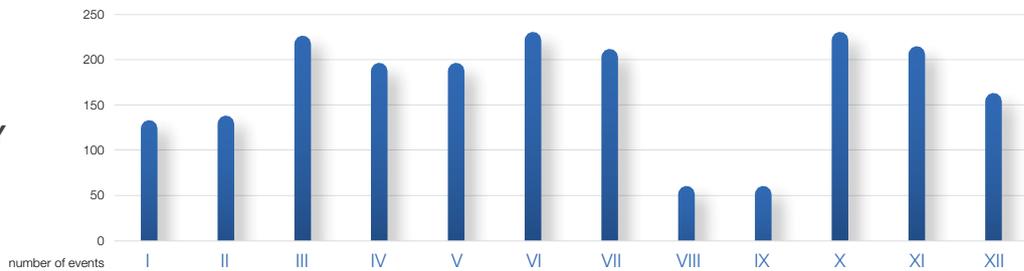


8%

technology



SEASONALITY



GROUP ORIGIN



92%

domestic

8%

foreign

TYPE OF GROUP



56%

companies



25%

governmental institutions
and public organisations



19%

associations and
non-profit organisations



DURATION OF EVENTS

83% 1 day

14% 2-3 days

3% 4 and more days

1.3 days average duration of events

TYPES OF VENUES HOSTING EVENTS



46%

hotels



29%

venues and
halls for
special events



14%

exhibition
and
congress centers



10%

high
schools

KATOWICE

The construction of the Polish National Radio Symphony Orchestra's new headquarters featuring one of the world's best concert halls contributed to winning the prestigious title of a UNESCO City of Music. The organization of the COP24 Climate Summit in December 2018 became a ticket to host more prestigious events.



NUMBER OF EVENTS



1,026

events reported by
Katowice Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



641,312

total number
of participants



626

average number
of participants
per event

TYPE OF EVENTS



45%

conferences and
congresses



42%

corporate and
incentive events



13%

trade shows

INDUSTRY BREAKDOWN



53%

humanities



17%

economics and
politics



11%

technology



9%

trade and
services



7%

medicine



3%

IT and
communications



SEASONALITY



GROUP ORIGIN



95%

domestic

5%

foreign

TYPE OF GROUP



56%

companies



24%

associations and
non-profit organisations



20%

governmental institutions
and public organisations



DURATION OF EVENTS

72% 1 day

25% 2-3 days

3% 4 and more days

1.5 days average duration of events

TYPES OF VENUES HOSTING EVENTS



31%

high
schools



29%

hotels



25%

exhibition
and
congress centers



15%

venues and
halls for
special events

KRAKÓW

Kraków is a historical city, the European Capital of Culture, a city bursting with events - recognized as one of the best locations for companies from the business services sector. Using all these advantages and a professional conference and congress facilities, Kraków has become one of Europe's leading host destinations for major events.



NUMBER OF EVENTS



5,294

events reported by
Kraków Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



1,099,831

total number
of participants



208

average number
of participants
per event

TYPE OF EVENTS



69%

corporate and
incentive events



29%

conferences and
congresses



2%

trade shows

INDUSTRY BREAKDOWN



26%

trade and
services



20%

humanities



16%

technology



13%

economics and
politics



7%

medicine



5%

IT and
communications



SEASONALITY



GROUP ORIGIN



76%

domestic

24%

foreign

TYPE OF GROUP



67%

companies



20%

governmental institutions
and public organisations



13%

associations and
non-profit organisations



DURATION OF EVENTS

63% 1 day

30% 2-3 days

7% 4 and more days

1.7 days average duration of events

TYPES OF VENUES HOSTING EVENTS



66%

hotels



15%

venues and
halls for
special events



12%

high
schools



7%

exhibition
and
congress centers

LUBLIN

Lublin is increasingly often picked as a destination hosting major and prestigious events. Lublin region effectively applies its economic assets that focus on smart specialisations: bio-economy, medicine and health, information technologies and automation, as well as low-emission energy systems.



NUMBER OF EVENTS



1,777

events reported by
Lubelskie Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



490,209

total number
of participants



276

average number
of participants
per event

TYPE OF EVENTS



66%

conferences and
congresses



31%

corporate and
incentive events



3%

trade shows

INDUSTRY BREAKDOWN



55%

trade and
services



21%

humanities



10%

economics and
politics



6%

medicine



5%

technology



3%

IT and
communications



SEASONALITY



GROUP ORIGIN



no data

TYPE OF GROUP



82%

companies



12%

governmental institutions
and public organisations



6%

associations and
non-profit organisations



DURATION OF EVENTS

87% 1 day

11% 2-3 days

2% 4 and more days

1.3 days average duration of events

TYPES OF VENUES HOSTING EVENTS



85%

hotels



13%

exhibition
and
congress centers



2%

venues and
halls for
special events

ŁÓDŹ

Łódź is becoming an increasingly popular destination hosting meetings and events. Poland's third-largest metropolis, it more and more often attracts not only nationwide events but also their international counterparts. The city has been experiencing an outright revival in recent years, with companies and institutions from all over the world recognising its dynamic development.



NUMBER OF EVENTS



993

events reported by
Łódź Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



478,223

total number
of participants



482

average number
of participants
per event

TYPE OF EVENTS



63%

conferences and
congresses



26%

corporate and
incentive events



11%

trade shows

INDUSTRY BREAKDOWN



40%

trade and
services



20%

medicine



16%

humanities



10%

economics and
politics



7%

technology



7%

IT and
communications



SEASONALITY



GROUP ORIGIN



89%

domestic

11%

foreign

TYPE OF GROUP



71%

companies



18%

associations and
non-profit organisations



11%

governmental institutions
and public organisations



DURATION OF EVENTS

63% 1 day

31% 2-3 days

6% 4 and more days

1.8 days average duration of events

TYPES OF VENUES HOSTING EVENTS



53%

hotels



22%

exhibition
and
congress centers



15%

venues and
halls for
special events



10%

high
schools

POZNAŃ

Every year Poznań hosts several thousand business events of domestic and international reach. The presence of the congress-and-exhibition Poznań Congress Centre (MTP Group) adjusted to the needs of the MICE market, constitutes an essential competitive advantage of the city. Poznań and its environs offer a wide range of unique venues as well.



NUMBER OF EVENTS



3,077

events reported by
Poznań Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



1,408,700

total number
of participants



458

average number
of participants
per event

TYPE OF EVENTS



64%

conferences and
congresses



32%

corporate and
incentive events



4%

trade shows

INDUSTRY BREAKDOWN



31%

trade and
services



25%

humanities



14%

technology



12%

economics and
politics



11%

medicine



7%

IT and
communications



SEASONALITY



GROUP ORIGIN



94%

domestic

6%

foreign

TYPE OF GROUP



79%

companies



13%

governmental institutions
and public organisations



8%

associations and
non-profit organisations



DURATION OF EVENTS

85% 1 day

14% 2-3 days

1% 4 and more days

1.2 days average duration of events

TYPES OF VENUES HOSTING EVENTS



53%

hotels



30%

venues and
halls for
special events



12%

exhibition
and
congress centers



5%

high
schools

TORUŃ

Toruń is mostly known as a city of magnificent historical monuments and a hub of cultural and sports events. The local Old Town was added to the UNESCO World Heritage List more than 20 years ago. The city has at its disposal one of Europe's most advanced indoor arenas and a top-notch speedway stadium.



NUMBER OF EVENTS



401

events reported by
Toruń Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



63,355

total number
of participants



158

average number
of participants
per event

TYPE OF EVENTS



75%

conferences and
congresses



20%

corporate and
incentive events



5%

trade shows

INDUSTRY BREAKDOWN



46%

trade and
services



16%

humanities



15%

medicine



14%

economics and
politics



5%

IT and
communications



4%

technology



SEASONALITY



GROUP ORIGIN



99%

domestic

1%

foreign

TYPE OF GROUP



65%

companies



18%

associations and
non-profit organisations



17%

governmental institutions
and public organisations



DURATION OF EVENTS

60% 1 day

39% 2-3 days

1% 4 and more days

1.5 days average duration of events

TYPES OF VENUES HOSTING EVENTS



87%

hotels



9%

venues and
halls for
special events



4%

exhibition
and
congress centers

WARSAW

Warsaw is the largest and most important meeting destination in Poland. It is here that the political, economic, scientific and cultural agendas of the whole of Central-Eastern Europe all come together. Every year Warsaw hosts thousands of business events making Warsaw an unquestionable leader of Poland's meetings industry.



NUMBER OF EVENTS



7,523

events reported by
Warsaw Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



2,514,148

total number
of participants



334

average number
of participants
per event

TYPE OF EVENTS



73%

conferences and
congresses



25%

corporate and
incentive events



2%

trade shows

INDUSTRY BREAKDOWN



39%

trade and
services



15%

medicine



14%

technology



14%

economics and
politics



10%

humanities

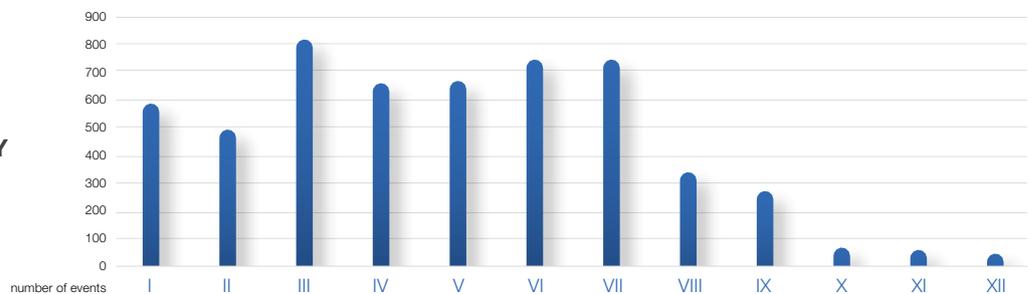


8%

IT and
communications



SEASONALITY



GROUP ORIGIN



no data

TYPE OF GROUP



84%

companies



8%

associations and
non-profit organisations



8%

governmental institutions
and public organisations



DURATION OF EVENTS

59% 1 day

35% 2-3 days

6% 4 and more days

1.7 days average duration of events

TYPES OF VENUES HOSTING EVENTS



93%

hotels



5%

venues and
halls for
special events



2%

exhibition
and
congress centers

WROCLAW

Wroclaw is an open, culturally diverse and business-friendly city that keeps on maximising its potential and simultaneously takes care of local residents. Thanks to the title of European Capital of Culture, Wroclaw is the fastest-growing cultural centre in Poland and Central-Eastern Europe.



NUMBER OF EVENTS



1,249

events reported by
Wroclaw - Convention Bureau
for groups of 50 and more participants

NUMBER OF PARTICIPANTS



419,069

total number
of participants



336

average number
of participants
per event

TYPE OF EVENTS



50%

conferences and
congresses



42%

corporate and
incentive events



8%

trade shows

INDUSTRY BREAKDOWN



35%

trade and
services



17%

economics and
politics



17%

humanities



12%

medicine



11%

technology



8%

IT and
communications



SEASONALITY



GROUP ORIGIN



91%

domestic

9%

foreign

TYPE OF GROUP



71%

companies



17%

associations and
non-profit organisations



12%

governmental institutions
and public organisations



DURATION OF EVENTS

74% 1 day

23% 2-3 days

3% 4 and more days

1.4 days average duration of events

TYPES OF VENUES HOSTING EVENTS



71%

hotels



15%

exhibition
and
congress centers



12%

venues and
halls for
special events



2%

high
schools

5

EVENTS STAGED BY RECOMMENDED CONGRESS ORGANIZERS (PCO) AND INCENTIVE TRAVEL COMPANIES (ITC)

NUMBER OF EVENTS



875

events reported by **PCOs** and **ITCs** for groups of 50 and more participants

NUMBER OF PARTICIPANTS



1,728,063

number of participants handled by **PCOs** and **ITCs**

TYPE OF EVENTS



44%

conferences and congresses



41%

corporate and incentive events



15%

trade shows

INDUSTRY BREAKDOWN



34%

trade and services



22%

humanities



15%

technology



13%

medicine



11%

economics and politics

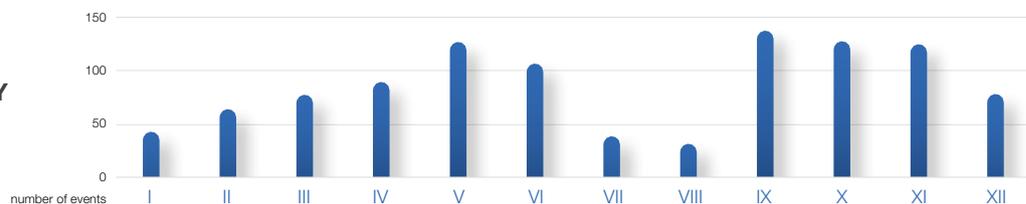


5%

IT and communications



SEASONALITY



GROUP ORIGIN



59%

domestic

41%

foreign

TYPE OF GROUP



77%

companies



14%

associations and non-profit organisations



9%

governmental institutions and public organisations



EVENT HOST DESTINATIONS



TYPES OF VENUES HOSTING EVENTS



46%

hotels



32%

exhibition and congress centers



20%

venues and halls for special events



2%

high schools

6

STUDY ON IMPACT OF CORONAVIRUS ON EUROPEAN CONVENTION SECTOR

Tourism Economics – Oxford Economics

commissioned by Strategic Alliance of the National Convention Bureaux of Europe

The analysis, prepared by Tourism Economics, aims at providing a constructive narrative of the meetings and conference sector's pathway through the crisis, towards recovery, and has developed three scenarios to reflect the possible range of outcomes from this crisis. The European research is supplemented by a report on Poland.

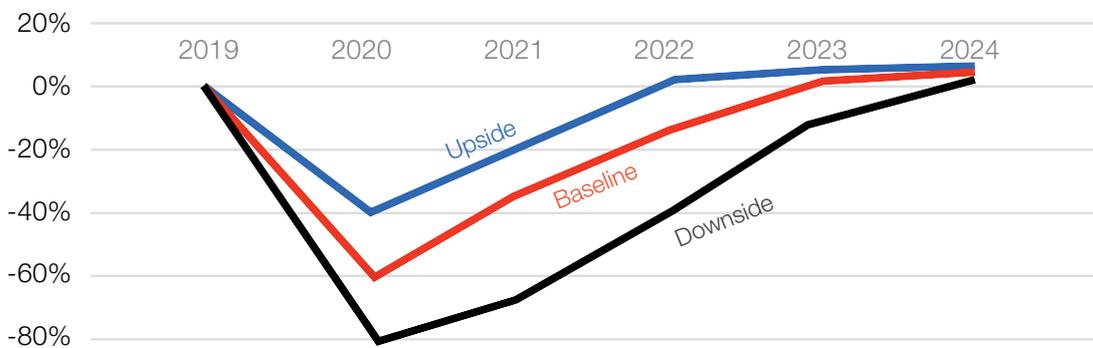
Baseline, upside and downside scenarios for European convention community

The baseline scenario assumes that all planned events scheduled between March and August are cancelled across Europe, with some recovery in September and October seeing up to 75% of all planned events within a given month going ahead and full recovery by November. Altogether, total event visits in Europe are expected to fall by 58% in 2020. Under the baseline model, some lingering negative sentiment effects are anticipated for both domestic and international event participation, which would result in a reduction in average attendance in 2021 and 2022 of 25% and 5% respectively, before fully recovering in 2023.

THE IMPACT OF CORONAVIRUS ON EUROPE'S CONVENTION SECTOR

Convention and event visitation growth

Amounts in percentage change in visitation since 2019



Source: Tourism Economics

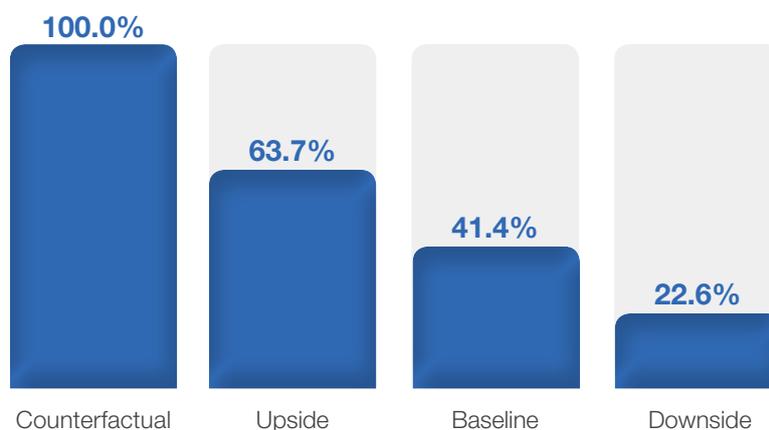


The upside and downside scenarios provide two alternative forecasts, indicating that business convention tourism will fall between 36% and 77% in 2020 with a sharp recovery under the upside and a more prolonged one under the downside scenario. The latter assumes, for example, that in September and October only 25% of all planned events are completed, with up to 75% taking place for the remainder of the year within a given month. It also foresees continued government restrictions on the size of gatherings in 2021 and a stronger impact of negative sentiment amongst potential attendees, which will ultimately not see full recovery before 2024. The upside scenario, on the other hand, works with the assumption that the crisis is brought under control in the next few months and expects a recovery beginning in June, with 25% of all planned events going ahead, increasing to 75% in August and all planned events being completed from September onwards.

THE IMPACT OF CORONAVIRUS ON EUROPE'S CONVENTION SECTOR

Convention and event attendees in Europe in 2020

Percentage of visits relative to the pre-crisis (counterfactual) scenario



Source: Tourism Economics

* This chart shows the proportion of counterfactual visitation levels that will be archived under each of the scenarios in 2020.



Factors driving the impact of coronavirus crisis

In developing the three scenarios, the study considered the actions that governments, businesses and individuals take to curb the outbreak as they primarily influence how the coronavirus impacts the meetings and conference industry. Three factors in particular are driving the impact and were taken into account for the analysis:

1. event cancellations or delays implemented voluntarily by organisers or in response to government restrictions on crowd gatherings,
2. official travel restrictions, be it government- or corporate-side,
3. individual risk aversion that might lead to potential attendees cancel their attendance.

Forecast for Poland

The analysis prepared by Tourism Economics - Oxford Economics was created on the basis of data provided by the Poland Convention Bureau POT, collected annually for the Poland Meetings and Events Industry Report and aggregated data from the GTS Tourism Economics database. The scenarios, based on research results, assume a decrease in the number of conference tourism participants between 32% and 76% in 2020, after which, in subsequent years, a gradual progress is visible, until full recovery market in 2023.

Full report: [Study on impact of coronavirus on European convention sector – Poland](#)

About the Strategic Alliance of the National Convention Bureaux of Europe:

The Strategic Alliance of the National Convention Bureaux of Europe is a network of national destination marketing organizations. Poland Convention Bureau Polish Tourism Organisation is one of its founding members. As a collaborative industry platform, it concentrates on strengthening Europe's position as a leading destination for international business events. Since its foundation in 2014, the initiative of European convention bureaus has increasingly gained in importance as a platform for exchanging experiences and knowledge transfer between the membership countries. The purpose of the Alliance is to create a beneficial working relationship amongst the national convention bureaus of Europe in order to sustain and further develop the position of Europe.

Poland Convention Bureau PTO, as its founding member, participates in all research projects and meetings of the Alliance which follows the objective of reinforcing cooperation between European countries. By being involved in actions aimed at working out joint standards of the European industry, we emphasise Poland's position as an attractive region for meetings and business events in the international arena.

www.convention-europe.com

7 POLAND CONVENTION BUREAU OF POLISH TOURISM ORGANISATION



POLAND
CONVENTION
BUREAU



POLSKA
ORGANIZACJA
TURYSTYCZNA

Polish Tourism Organisation is among the several dozen national tourist organisations operating all around the globe. Its main goal is to promote Poland as an attractive and modern travel destination distinguished by high-quality services and affordable prices. POT's operations aimed at promoting and developing Polish tourism are conducted both at home and abroad. Polish Tourism Organisation International Offices (ZOPOT) are set in countries recognised as particularly important and promising for the growth of Poland's inbound tourism. At present, POT operates 14 offices of this kind, including 11 in Europe, one in New York City, U.S., one in Tokyo, Japan, and one in Beijing, China.

Launched in 2002 within the structures of Polish Tourism Organisation, Poland Convention Bureau (PCB) is a unit responsible for promoting Poland as a sought-after destination for staging meetings and business events.

In addition, PCB is meant to act as a [first point of contact](#) for everyone looking for information about business partners and conference venues or planning to bring their association congress or corporate event to Poland.

A priority goal of PCB is to build Poland's image of an attractive host destination for all types of business events. This mission is pursued by:

- participating in international trade shows and, consequently, making successive business contacts,
- arranging familiarization trips for foreign journalists and organisers of meetings and business events, including conferences, congresses, product launches and incentive trips,
- securing new meetings and business events to be hosted by Poland,
- collaborating with foreign media and placing articles and advertisements promoting Poland as a business destination in the press and trade catalogues,
- maintaining working relationships with municipal convention bureaux as part of the discussed operations,
- establishing cooperation with Polish meetings industry entrepreneurs as part of the Recommended Professional Congress Organiser and Recommended Incentive Travel Company programmes,
- establishing cooperation with the Polish scientific community, i.a. as part of the Polish Congress Ambassadors Programme and the National Support Programme for the Meetings Industry,
- maintaining working relationships with domestic and international organisations and associations of professionals connected with the meetings industry,
- collecting and processing statistical data covering meetings and business events staged in Poland, following the recommendations of international organisations supervising similar rankings - International Congress and Convention Association (ICCA) and Union of International Associations (UIA).

Poland Convention Bureau of Polish Tourism Organisation is a founding member of the Strategic Alliance of the National Convention Bureaux of Europe, a network of national organisations responsible for destination marketing, whose main goal is to boost partnership between convention bureaux throughout Europe in order to maintain and strengthen its status. The foundation of the Alliance was officially announced at IMEX America 2014 in Las Vegas. Today it has 28 members.

Since the 2002 launch of Poland Convention Bureau within its structures, Polish Tourism Organisation has been a member of International Congress and Convention Association (ICCA) and - since 2011 - of Union of International Associations (UIA).

Poland Convention Bureau of Polish Tourism Organisation has launched **Poland: Online Site Inspection**, a brand-new tool aimed at the meetings industry that is available at pot.gov.pl.

Compiled by Polish Tourism Organisation in cooperation with municipal and regional convention bureaux, the virtual catalogue features selected information illustrating the potential of Poland's meetings industry, including conference and congress centres, hotels, restaurants and unique venues. In addition, it presents so-called city portfolios, key facts in the form of infographics on crucial tourist venues and highlights, incentive programme concepts and multimedia materials of particular cities, including interactive maps making it possible to admire crucial venues from a bird's eye view. The materials are intended to encourage users to first plan and then stage meetings and events in Poland.

The complex and long-lasting process of securing and planning events, with particular emphasis on international congresses, demands the involvement of numerous stakeholders of the meetings sector. This is why Poland: Online Site Inspection features not only a venue search engine, but also contact details of municipal and regional convention bureaux, professional congress organisers (PCOs) and incentive travel companies (ITCs) recommended by Polish Tourism Organisation and involved in local product sales and building experience.

To learn more, access the virtual catalogue at www.pot.gov.pl/en/online-site-inspection

POLAND

Virtual Site Inspection

