



INDIVIDUAL COUNTRY REPORT: POLAND

Prepared For: The Strategic Alliance of the National Convention Bureaus of Europe

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I. Project Overview

Project Objectives Overview

Europe as a Destination for Meetings and Conferences

Project Objectives

- Highlight economic, political and social conditions and current trends and their impact on the meetings industry
- Help European DMOs and its cooperation partners to assess opportunities and challenges
- Identify the impact these developments have on the meetings industry



Research Institute and Design


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Research Design

SIS conducted an exhaustive “deep dive” into available material through secondary desk research, followed by primary research in the form of in-depth interviews with both meeting buyers and meeting sellers from a variety of industries and countries to generate this report.



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Research Partners

Research Partners

9 Alliance Partners:

- Netherlands Board of Tourism & Conventions, Austrian Convention Bureau, Polish Tourism Organisation, Visit Norway, Croatian National Tourist Board, Swedish Network of Convention Bureaus, MeetDenmark, German Convention Bureau, Convention Bureau Italia

Industry Partners:

- Simpleview
- PCMA

simpleview 






II. Market Analysis and Forecast

Overall Industry Health

Overall, the MICE industry in Poland is currently struggling. Safety is a key priority for MICE organizers, and fears of robbery and other crime have harmed Poland's reputation.¹



Industry Collaboration

However, in recent years, greater collaboration across the industry has been a bright spot. The annual Meetings Week Poland, which started in 2014, brings industry minds together to work on solutions, share best practices, and promote the industry as a whole as a key piece of the Polish Economy. Securing funds for promotion has been a key issue discussed at Meetings Week, as local government authorities have tended to underestimate the role the MICE industry can play in promoting an area.²

ICCA Ranking

According to the annual rankings from the International Congress and Convention Association, widely used as an industry barometer, Poland was the #18 country worldwide for meetings and events, and the #11 country in Europe, with a total of 216 qualified meetings being held throughout the country in 2017.³

ICCA Ranking

The number one city in Poland for meetings and events, according to the ICCA rankings, was Warsaw, ranking 16th in Europe with 89 qualifying meetings.

Poland had another 4 cities in the European top 100: Cracow at #27 (45 meetings), Poznan at #74 (20 meetings), Gdansk at #89 (16 meetings), and Wroclaw at #100 (14 meetings).³



III. Social, Political, and Economic Factors

Economic Overview

There has been an ongoing effort to develop Poland's economy through structural reforms such as trade liberalization, low taxes, and pro-business regulations(1). However, political issues and corruption, combined with high exchange rate volatility, have led to difficulty attracting foreign investment. With that said, Poland's GDP is growing.⁴

Economic Growth

Poland was one of the fastest growing economies in the world before the 2008 financial crisis, and is now one of the fastest growing post crisis as well. McKinsey and Co. projects that, should Poland continue “business as usual” until 2020 Poland’s economy will grow nearly \$200 billion, making it the 22nd largest in Europe. By disseminating best practices from Poland’s most advanced industry sectors, however, the country’s economy could grow nearly \$350 billion, making it the 17th largest in Europe.⁷

Infrastructure

Poland is continuing to devote large amounts of resources to developing its infrastructure, attempting to take advantage of EU funds that will likely disappear under the next EU budget in 2020. They plan to spend \$37.5 billion on highways and roads by 2025. Recently, the holding company managing the Polish State Railways was restructured to run more efficiently and be better managed. There are also plans for a new airport, to be completed by 2027 through a public-private partnership and costing nearly \$10 billion.⁵

Infrastructure

Many new hotels were built ahead of the 2012 soccer championships, and additional larger venues have been opened in recent years. More venues not only allows for a larger number of events, boosting the countries profile, but also attracts more meeting hosts. Meeting buyers we spoke to had a strong preference for locations with more available venues, as more options gave them greater negotiating power.²

Anti-EU Sentiment and Far-Right Politics

Poland has seen a large increase in far-right politics, including anti-EU sentiment. Some factions have floated the idea of leaving the EU all together.

The ruling PiS party faces challenges on the left from pro-European parties, and now from a far-right group as well, Konfederacja, which is doing increasingly well in the polls. As has been seen with Brexit, a similar situation in Poland would create uncertainty that would hurt an already struggling MICE sector.⁶




IV. Advantages for Poland

Low Cost MICE Destination

Generally favorable exchange rates, combined with a large number of potential venues from the EuroCup related boom in hotels, make Poland an attractive MICE destination from a cost perspective. While cost wasn't their number one concern, planners we spoke to did list cost as one of their decision factors. MICE industry players in Poland should stress this advantage in their international marketing.

Freshness

Many of the meetings buyers we interviewed were interested in looking to new destinations to hold their events. Fresh destinations can help them attract more attendees. Being a relatively “up and coming” destination for international meetings, Poland can be a fresh new destination for meeting planners.



Unique Offerings

Poland offers unique historical sites, cultural festivals, art, music, and food. Some refer to Warsaw as “the new Berlin,” for its vibrant cultural life.⁸

MICE professionals can capitalize on these strengths by focusing on incentive events and high-budget corporate events, as opposed to scientific/medical events, as those planners are more likely to be considering and swayed by the “extracurriculars” that Poland can offer.



V. Recommendations for Action

Promote Safety

A key barrier to growing Poland's MICE industry is perception that the country is not as safe as others. Marketing campaigns should work against this perception, highlighting examples of safe and successful events held in Polish cities. Additionally, when large events do come to Poland, MICE industry players should increase efforts with the government to ensure as few incidents as possible, and that any incidents that do occur are handled promptly and satisfactorily.

Continue Collaboration

With the industry becoming increasingly global and competitive, the collaboration between domestic competitors—as evidenced by Meetings Week Poland—will be key to increasing the country’s competitiveness in the global MICE market. Working together to increase the country’s profile as a whole can only benefit all individual players in the long run.

Advertise Low Cost

Perhaps Poland's biggest advantage as a MICE destination is low cost compared to other potential destinations. Generally favorable exchange rates, combined with enough supply of potential meeting venues, creates a very buyer friendly market. Positioning itself as a low-cost, accessible destination, could help Poland to boost its profile in the MICE industry. Attracting more meetings in this way will help improve Poland's overall reputation.

Take Long Term View

Poland is one of Europe's most up-and-coming nations, especially economically. With the right long term moves, Poland will be on the same level economically as Spain and Italy—number 4 and 5 on the worldwide ICCA rankings. Poland's best days as a global MICE player are surely ahead of it. For many, it may be a case of holding on until that point.

VI. Sources



Sources

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