

POLAND

MARKET PROFILE

The Polish convention market

Across Poland 24,400 business conventions and events were hosted in 2019, supporting 8 million visitors.

The Polish convention market supported €1.9 billion of visitor spending in 2019. Overall, event visitor spending has increased by €0.7 billion since 2015.

Polish convention sector

Amounts in billions of current euros and millions of visitors

	2015	2016	2017	2018	2019	Distribution of total 2019
Total visitor spending	€ 1.2	€ 1.3	€ 1.6	€ 1.8	€ 1.9	
Domestic	€ 0.4	€ 0.4	€ 0.4	€ 0.5	€ 0.6	31%
International	€ 0.7	€ 0.9	€ 1.1	€ 1.2	€ 1.3	69%
Total visitors	7	6	7	8	8	
Domestic	5	4	5	6	6	70%
International	2	2	2	2	3	30%

Source: Tourism Economics

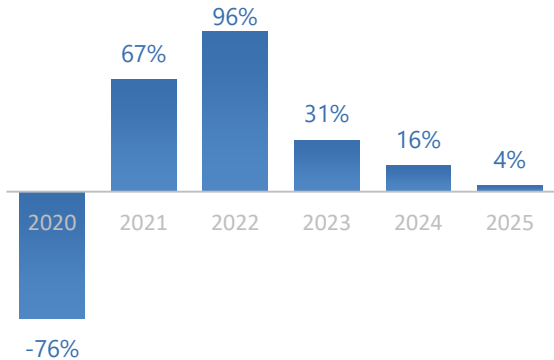
SCENARIO RESULTS

Year-on-year growth rates of visitors

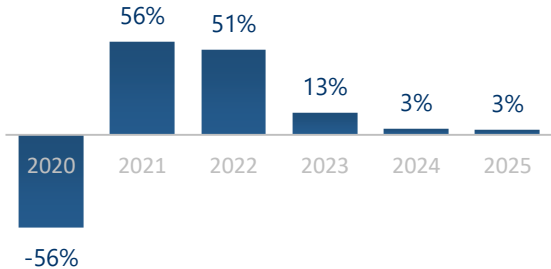
Alternative forecasts indicate that business convention tourism will fall between 32% and 76% in 2020.

This is equivalent to between 3 million and 6 million fewer visitors relative to 2019 levels.

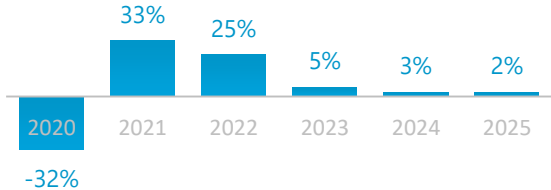
Downside visitor growth



Baseline visitor growth



Upside visitor growth



SCENARIO RESULTS

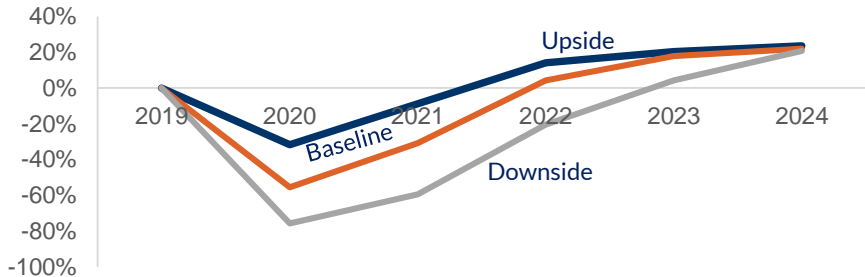
For visitation and spending growth

Spending levels are expected to fully recover to pre-crisis levels by 2022 under the baseline and upside scenarios.

However, for the downside scenario the scale of the initial decline and short-term drop in event attendance imply that full recovery will not occur until 2023.

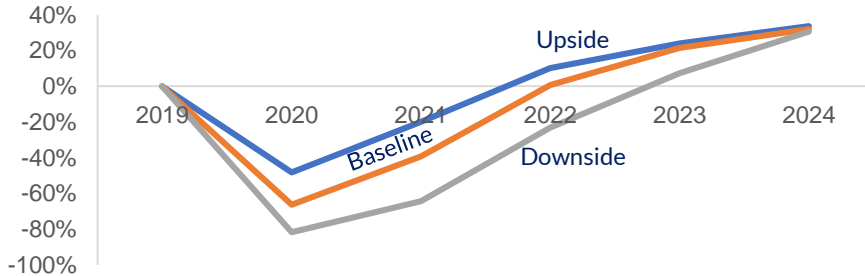
Convention and event visitation growth

Amounts in percentage change in visitation since 2019



Convention and event visitor spending growth

Amounts in percentage change in spending since 2019



Source: Tourism Economics

SCENARIO RESULTS

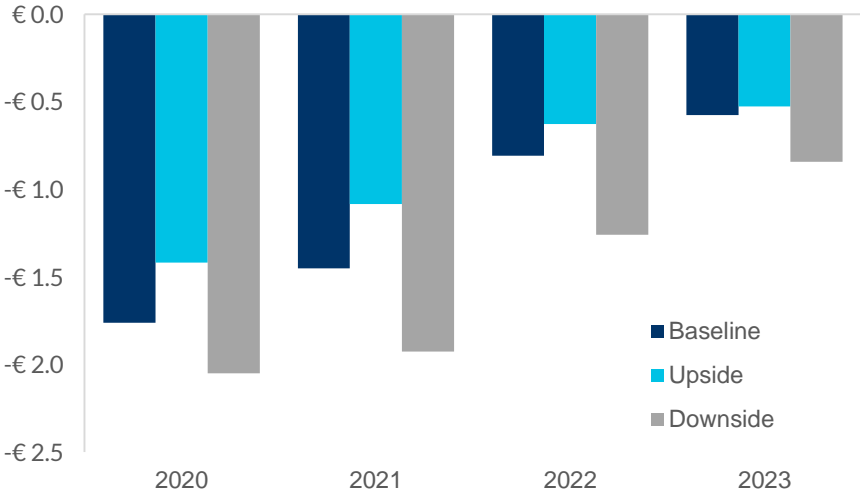
Counterfactual comparison

Scenarios indicate there could be a reduction of between €1.4 and €2.1 billion in 2020 spending as a result of this crisis.

Under all scenarios spending will not recover to pre-crisis forecast levels as our current GTS forecast anticipates that this crisis has caused a permanent shift travel activity.

Convention and event spending in Poland

Spending relative to a counterfactual scenario, billions of current euros



Source: Tourism Economics

DATA SOURCES

Data sources and methods of estimation for 2019 estimates

Data provided by the **Strategic Alliance** was the primary source of data for Poland's participant levels and ALOS estimates.

Estimates on the proportion of visitors on day-visits were derived from a report on the German business travel market in 2010/2011. This report was sponsored by the Federal Ministry for Economic Affairs and Energy as well as a number of other organisations. Ideally, country-specific estimates for the day-visit share of events would have been available but it was beyond the scope of this study to source these data.

Spending per overnight stay and day-visits was sourced from Tourism Economics' Event Calculator. All remaining data gaps were estimated using aggregated data from Tourism Economics' GTS database.