

IMPACT OF THE EVENTS SECTOR ON THE ECONOMY – CASE STUDY OF POLAND

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ABSTRACT

The goal of the study conducted project was to quantify the economic importance of meetings and events (i.a. social, economic, business) staged in Poland and show their economic contribution. This objective inspired research questions inquiring about the structure of the expenditures of meeting and event participants, the Gross Domestic Product generated thanks to Poland's meetings industry and the number of jobs created to perform services for meetings and events in Poland.

The project's three-stage analysis examined three groups of stakeholders: participants, organisers of meetings and events (seven categories) and venue administrators (twelve categories). The goal was achieved thanks to the collected data and an econometric model based on the data of the Central Statistical Office of Poland, built specifically to determine the meetings industry's impact on national economy. The research estimated the meetings industry's contribution to GDP at the level of 1%. In 2015 meetings and events generated 25,911,301,000 for Poland's economy and 11,960,058,000 PLN of gross value added. 12,401,600 domestic and international participants attended the meetings and events, which on average lasted two days. The meetings industry's employment contribution amounted to 171,000.

Introduction

The goal of the study conducted as part of The Economic Impact of Poland's Meetings Industry – Poland Meetings Impact 2015 project was to quantify the economic importance of meetings and events (i.a. social, economic, business) staged in Poland and show their economic contribution. This objective inspired research questions inquiring about the structure of the expenditures of meeting

and event participants, the Gross Domestic Product generated thanks to Poland's meetings industry and the number of jobs created to perform services for meetings and events in Poland.

Upon this occasion, the team composed of academics and industry representatives made an attempt to evaluate the economic impact of the meetings and events industry at a national level. This was a considerable research challenge, as demonstrated by the fact that even countries boasting well-developed economy and tourism have only recently made an effort to estimate the impact. National authorities usually assign this task to recognised research companies, a fact indicating that we are dealing with major budgets. Serious and complicated analyses finally result in several figures, with the meetings industry's share of a country's GDP as the most often cited example. The figures currently available in global literature on the subject are not comparable due to the absence of uniform research methodology and the fact that results concern different periods. The best-known figures show that the meetings industry accounts for 1.43% of Mexico's GDP (2010), 1% of the gross value added of Denmark's GDP (2010), 1.5% of Canada's GDP (2012), 1.06% of Singapore's GDP (2012), 0.77% of Thailand's GDP (2014) and 1.78% of Malaysia's GDP (2015). The UK meetings industry, which delivered 2.9% of the national GDP and 3.4% of the country's employment (2011), attracted the largest attention. Taking into account the highly diversified character of the British economy and the numerous advanced services available within it, this is certainly an impressive number that gives some idea of the serious contribution that the meetings industry is capable of making.

The measuring initiatives undertaken in countries of key importance for the meetings and events market inspired the very first comprehensive attempt of this type in Poland. The collective efforts of the team and industry representatives, who agreed to cooperate and hand over data from their venues, for which we owe heartfelt thanks, made it possible to attain several coveted figures.

The aim of the study was to estimate the meetings industry's contribution to Poland's GDP and labour market.

Theoretical Foundation(s) / Review of the Literature

A "meeting" can be defined as a gathering of several or many people in one place and/or at the same time in order to discuss, exchange views and experiences, debate, present products, share knowledge and ideas, as well as to learn and motivate. The meeting in question might be arranged on a one-off basis or regularly, with certain seasonality. As defined by Convention Industry Council (CIC), the term refers to a gathering that fulfils the criteria of 10 or more participants meeting for a minimum of four hours in a contracted venue/destination (UNWTO, 2006).

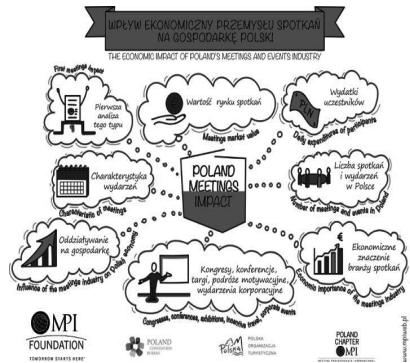


Figure 1. The model of economic impact of Poland’s meetings and events industry

Source: Celuch (2015a).

The acceptance of these assumptions determines what types of meetings will constitute the subject of research into the industry. As “meetings industry” also tends to be used as a synonym of business tourism, it is worth emphasising the fundamental difference between the two terms. The scope of business tourism, understood as a synonym of business trips, encompasses also individual business trips, whose participants do not attend meetings (as defined by CIC) and thus cannot be comprehended as part of business tourism (Borodako, Berbeka, Rudnicki, 2015, p. 13). The meetings industry, on the other hand, also involves aspects that remain outside the scope of business tourism. Meetings, after all, might have a local character and then do not require their participants to travel and/or leave their place of residence and seek overnight accommodation (fig. 1). In other words, these cases are distinguished by the lack of features determining the emergence of tourism. The discussed meetings have local participants gathering in one place, usually people personally involved in a given issue or interested in the discussed subject matter exerting a direct or indirect impact on themselves or their surroundings. The “MICE” acronym (or “MICE tourism”) is another term of English origin that until recently has been widely applied in foreign and domestic studies. The acronym was formed by combining the first letters of the words Meetings, Incentive, Conventions, Exhibitions or Meetings, Incentive, Congresses, Events, thus indicating which categories of meetings it encompasses. The name first became highly popular in literature on the subject, but recently is increasingly less frequent owing to a certain semantic awkwardness for English speakers (Berbeka et al. 2009, p. 13). For people insufficiently informed about business tourism, the “MICE” term might create an inappropriate picture of the market, as a consequence reducing its economic rank (Fullforms, 2013). In addition, the emergence of new types of meetings, which fall outside the scope defined by the big four, also contributed to “MICE tourism” losing its relevance.

The meetings industry can be deemed a fast-growing sector with a significant contribution to the national economy (Weber, Ladkin, 2004; Deery, Jago, Fredline, Dwyer, 2005; Dwyer, Deery, Jago, Spurr, Fredline, 2007). However, in today’s knowledge-based economy, when information is of enormous importance as a knowledge component, a mere statement about a “significant”

contribution is imprecise and insufficient. This explains the attempts aimed at measuring and calculating the economic significance of the meetings industry (Lee, 2006; Dwyer et al., 2007). It is important to highlight that meetings held in a given place generate direct effects in the form of the expenditure of participants and organisers, indirect effects thanks to the spending of direct suppliers, and induced effects involving the further spending of the beneficiaries of the direct and indirect expenditure (Dwyer, Forsyth, 1997).

Research Methodology

Methodology is obviously a factor of crucial importance for the credibility of results. It is essential to take into consideration the expenditures of both the supply and demand sides of the market, paying particular attention not to examine the same streams twice.

The IO analysis was frequently applied in works dedicated to the economic contribution of domestic and international meetings (Rutherford, Kreck, 1994; Mistilis, Dwyer, 1999; Dwyer, Mellor, Mistilis, Mules, 2000; Kim, Chon, Chung, 2003; Lee, 2006; Kim, Chon, 2009; Lee, Lee, Yoon, 2013). The main goal of the models is to measure the co-dependency of particular industries within a given economy (Miller, Blair, 2009). It remains debatable whether the expenditures of local residents should also be taken into account. The opponents point out that we are dealing with a mere redistribution of resources (Southwick, Bergstrom, Wall, 2009), which is not synonymous with making an economic impact. According to other opinions, the expenses of local residents contribute to the creation of new jobs and thus should be taken into consideration (Dae-Kwan, Hak-Jun, Sang-Min, Yeongbae, Soo-Yeop, 2015). Early research conducted back in the 1990s (Falk, Pizam, 1991; Braun, Rungeling, 1992; Lee, 2006) focused exclusively on the expenditures of participants. This approach was inspired by the complex character of the meetings industry and problems with arranging the research process (Dwyer, 2002; Lee et al., 2013).

The first comprehensive approach was aimed at estimating the impact of the meetings industry in Orlando, Florida, and encompassed direct and indirect multipliers and an analysis of the industry's interrelationships (Braun, Rungeling, 1992). The study was expanded by Dwyer and Forsyth (1998), whose research framework was intended to estimate the overall impact and featured induced multiplying factors next to direct and indirect multipliers. In addition, Mistilis and Dwyer (1999) attempted to evaluate the MICE impact on a region but focused on indicating the differences between urban and nonurban areas.

Research featured several models developed to evaluate the economic contribution of tourism, among them the Tourism Regional Economic Impact Model (TREIM), which makes it possible to produce the estimates of direct, indirect and induced impacts of tourism-related activities on regional economy in the fields of Gross Domestic Product (GDP), labour income and employment (TREIM, 2008). The second attempt at examining the impact of tourism, the Regional Industrial Multiplier System (RIMS II), helps to estimate how much a one-time or sustained increase in economic activity in a particular region will be supplied by the industries located in it (Chang, 2001). The third of the research models, the Impact analysis for PLANning (IMPLAN) tool, was

used to identify the impact of tourism on the regional economy of the state of Vermont (Bonn and Harrington, 2008).

The approach taken under the auspices of the World Travel and Tourism Council (WTTC) is an entirely different concept. In conjunction with Oxford Economics (OE), WTTC is conducting research on the impact of travel and tourism on the economy, including both global and regional employment. Its methodology identifies the effects of direct impact but also perceives the total contribution of travel and tourism as a wider phenomenon, involving indirect and induced impacts (following the concept of multiplier effects). According to WTTC, tourism economy refers both to providers of strictly tourist services (e.g. accommodation, transportation) and of goods and services indirectly linked with travel and tourism (e.g. vehicles, fuel). Tourism-related investments, public spending and export of goods are all perceived by WTTC as tourism-generated economy drivers.

Consistent data covering particular countries are required to make direct comparisons possible (WTTC, 2013). In 2006 the cooperation between ICCA, World Tourism Organisation (UNWTO), Meeting Professionals International (MPI) and Reed Travel Exhibitions, the organizer of IBTM World, resulted in developing and publishing Measuring the economic importance of the meetings industry – Developing a tourism satellite account extension, a study compiling guidelines on the measurement of the meetings industry’s importance for national economies, referring to the Tourism Satellite Accounting methodological framework (ICCA, 2017) The development of the standards discussed above contributed to research conducted in particular countries. The results demonstrated a considerable economic impact of the meetings industry. All the studies showed that more than 50% of the direct expenditure by delegates and organizers involved products not related to tourism. (fig. 2).

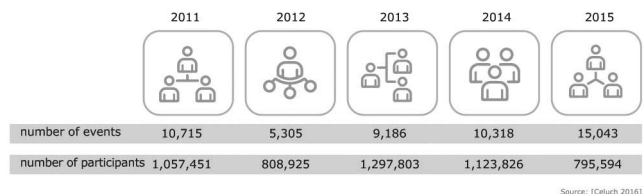


FIG. 4 POLAND IN THE ICCA RANKING IN 2011 – 2015

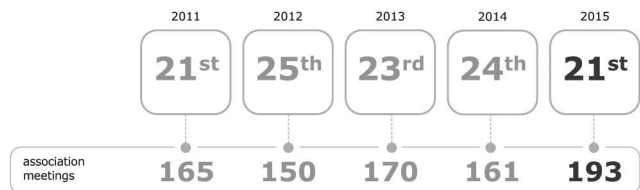


Figure 2. Number of conferences and congresses in 2011–2015

Source: Celuch (2015a).

The suggested methodology is linked to the combination of business approach and scientific method which could be questioned by academic environment, but still bring new way of calculating the impact.

A research goal formulated in this way inspired the following research questions:

1. What is the structure of the expenditures of meeting and event participants?
2. What is the Gross Domestic Product generated thanks to the meetings industry in Poland?
3. How many jobs were created by providing services for meetings and events in Poland?

Following an adopted formula, four groups of meetings/events were selected: conferences/congresses, corporate events, incentive events and trade fairs/exhibitions. For the purposes of this research, the following terms were employed:

- “conference/congress” describes national and international meetings of associations, with no clear division into governmental and non-governmental meetings,
- “corporate event” describes company events, with particular emphasis on trainings, workshops, seminars, press conferences, product launches,
- “incentive event” describes, among others, motivation-boosting travels and trips focused on the reward and recognition aspect,
- “trade fairs/exhibitions” describes large-scale events of any subject, usually staged in trade fair centres.

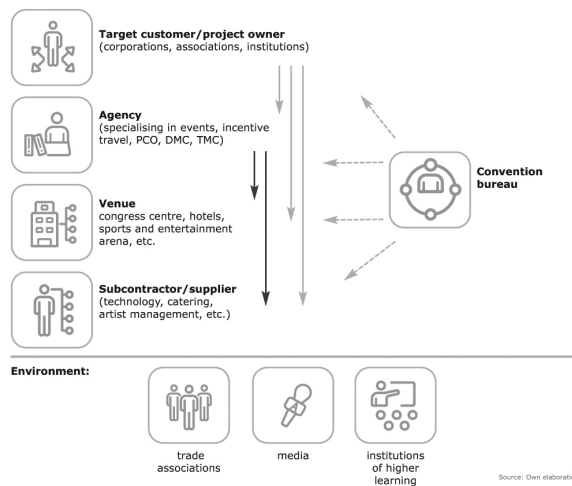


Figure 3. Poland's market of meetings and events

Source: Celuch (2015a).

The assumptions and goals were verified upon the basis of quantitative analysis and perceived in the industry context with a breakdown into meetings and events focused on the following subjects: humanities, technology, IT and communications, economy and politics, as well as medicine. These thematic categories should be understood as follows:

- humanities – meetings and events dedicated to culture and art (history of art, philology, musicology, ethics, philosophy) and social sciences (history, archaeology, sociology, psychology, economics, anthropology),
- technology – meetings and events dedicated to architecture and urban planning, automatic control and robotics, biocybernetics, construction, electronics, electrical engineering, geodesy and cartography, mining, engineering, chemical technology, transportation,
- IT and communications – meetings and events dedicated to the academic and technical discipline studying information processing, including information processing technologies, production technologies of information processing systems, as well as communication systems, communication and its derivatives,
- economy and politics – meetings and events dedicated to economy, politics, finance, management sciences, commodity science,
- medicine – meetings and events dedicated to medical sciences, including stomatology, pharmaceuticals, public health, physical therapy, laboratory diagnostics, health technology, medical biology, biogenterology.

The scope of the analysis encompassed the participants, venue administrators and organisers of meetings and events held in Polish localities in 2015 and 2016, with special focus on cities and regions featuring regional convention bureaux and on venues participating in the project.

The following criteria were adopted to analyse meetings and events:

- number of participants and their places of origin,
- duration of national and international meetings and events,
- types and subjects of meetings and events,
- estimated economic impact of meetings held in Poland.

The entire research was to be implemented in 20 months and based on three key stages. Proper research was preceded by an analysis of literature on the subject with special regard to heretofore research on the meetings industry's impact on the economy of particular states. A successive element involved defining available statistical data connected with select types of economic activity in Poland's economy, which are directly related with the meetings market.

The building of an econometric model based on the data of the Central Statistical Office of Poland, intended to determine the meetings industry's contribution to national economy, was also among the most important tasks.

Next, the whole research was divided into three stages. Stage 1 consisted of studying the profile of the participants of meetings and events. The study was carried out in cooperation with 12 regional partners. Stage 2 studied the organisers of meetings and events responsible for securing, coordinating and implementing particular meetings. Finally, stage 3 focused on a study of venues divided into categories and an analysis of the impact, character and specific features of the meetings in question. Owing to the authors' involvement in the *Przemysł spotkań i wydarzeń w Polsce* report and familiarity with the market's structure and character from a formal perspective, a decision was made not to carry out a pilot study.

Research Findings

In other words, the substantive scope encompassed economic aspects connected with the industry's impact on the national economy in reference to fundamental reference points, i.e. value added, GDP and employment. The project's three-stage analysis examined three groups of stakeholders: participants, organisers of meetings and events (seven categories) and venue administrators (twelve categories).

The production volume related to the sector of meetings and events, as shown in the table, is not its only input to Polish economy. Its production requires the application of diverse goods and services constituting the indirect consumption of the discussed types of activity. Their production stimulates economic activity in particular industries, generating the so-called indirect effects of meetings and events. It is possible to define the size of these effects thanks to the application of coefficients of total product absorptiveness, which show the impact that the production of a given industry has on the whole economy (fig. 4).

	Global production	Gross value added
Total:	14,453,405	5,624,827
Food	3,310,407	1,466,540
Groceries	1,146,046	253,276
Wholesale trade	934,020	486,624
Electricity, gas	806,524	339,546
Real estate services	539,164	304,628
Beverages	487,144	141,759
Agriculture and hunting products	426,862	182,270
Advertising services, market research	391,989	174,435
Storage, postal and courier services	286,267	143,706
Equipment rental and leasing	277,624	155,470
Management counselling services	143,706	117,494

Figure 4. Indirect economic contribution of the meetings industry in 2015

Source: Celuch (2015a).

In the case of Poland, the available coefficients come from the 2010 Input-Output table compiled by the Central Statistical Office of Poland. Their application enabled the estimation of the indirect contribution made by meetings and events to Poland's economy in 2015. The results are shown in the table, which also presents data concerning the types of activity, whose production was most connected with meetings and events. It is worth noting that this group included, i.a. food and beverage-related activities, whose share in indirect effects is impressive.

On the basis of data collected in the course of research it was established that in 2015 events and meetings of interest for the study were attended by 12,401,600 guests from Poland and abroad.

No.	Activity type – symbol after Polish Classification of Activities	Global production	Gross value added	Number of jobs
Organisers and venue administrators				
1.	Accommodation – 55	1,041,880	442,860	6,785
2.	Food and beverage-related services – 56	4,371	1,044	39
3.	Tourism-related activities – 79	713,837	74,773	1,131
4.	Administrative office services, business support activities – 82	541,984	224,003	3,077
Participants				
5.	Accommodation – 55	7,028,507	2,987,594	45,772
6.	Food and beverage-related services – 56	348,554	100,322	3,074
9.	Cultural services – 90	379,489	272,083	9,525
10.	Land transport – 49	625,913		
11.	Air transport – 51	38,450	11,700	22
12.	Retail trade services* – 47	734,909	463,545	3,710
	Total	11,457,896	6,335,232	75,688

Figure 5. Direct economic contribution of the meetings industry in 2016

Source: Celuch (2015a).

On average the meetings and events lasted two days. A direct effect of staging the events and the expenditures of their participants was a contribution to the production of certain services and corresponding jobs (fig. 5). The table below includes more detailed information. The production volume listed in basic prices corresponds to the revenues of organisers and venue administrators, as well as participants’ expenses reduced by net indirect taxes (VAT and excise) (fig. 6).

No.	Venue type	Number of sent questionnaires	Number of provided responses
1	Exhibition/congress centre developed specifically for this purpose	31	18
2	3-star hotel with conference facilities	36	26
3	4-star hotel with conference facilities	30	26
4	5-star hotel with conference facilities	23	10
5	Cultural venue	51	7
6	Castle, palace, manor house	32	2
7	Conference room in an office building	87	1
8	Restaurant with conference rooms	38	1
9	Tourist attraction with conference-ready venues (but not developed specifically for this purpose). This category might include special event venues	24	3
10	Sports and entertainment hall	39	3
11	Higher education institution with conference rooms	4	2
12	Other – please specify	10	1
	TOTAL	405	100

Figure 6. Overview of venues participating in the research

Source: Celuch (2015a).

The total direct and indirect contribution of meetings and events to Poland’s economy in 2015 amounted to PLN **25,911,301,000** (current basic prices) and PLN **11,960,058,000** of gross value added, which comprised 1% of value added generated in the economy (according to early estimates

by the Central Statistical Office of Poland and included in the Local Data Bank, it equalled PLN 1,595,276). The lack of data relating to the net worth of indirect tax rates connected with the analysed scope of activity made it impossible to estimate the GDP contribution of meetings and events. However, we can assume that it resembled the input in the creation of gross value added, because there are no apparent reasons to believe that the relation between value added and indirect taxes was in this case considerably different from the relation for the whole economy. In addition, it was estimated that meetings and events contributed directly and indirectly to maintaining about 171,000 jobs.

Conclusion and critical analysis

The 25-year process of developing the meetings sector (industry) in Poland resulted in the functioning of an autonomous component (segment) of the economy, whose scope of activity involves the organisation of various types of events (distinguished by their multi-component character) commissioned by customers (representing corporations, associations and institutions) and in cooperation with them or aimed at fulfilling tasks through specialised entities (event agencies, incentive travel agencies, PCOs, DMCs, trade fair organisers) using services of specialised suppliers, among whom the category of venues is of particular significance. The size of this segment in Poland is demonstrated by below figure (fig. 7).

The Economic Impact of Poland's Meetings Industry – Poland Meetings Impact 2015 research was compiled by a team of researchers and industry experts working under the auspices of Meeting Professionals International Poland Chapter and Poland Convention Bureau Polish Tourist Organisation, in cooperation with regional convention bureaux from Poland, venues hosting meetings and events, as well as meeting organizers. Poland's very first publication of this kind also covered pioneering research on the meetings industry's impact on the economies of select countries, presented and sorted out terminology issues, as well as profiled Poland's meetings sector.

Finally, it is really important to explain why the research is needed and why it is so important from country statistical point of view to conduct the full research including all stakeholders of meetings and events industry. Starting from UNWTO perspective it is worth mentioning that only eight countries all around the world have conducted the full study about the economic impact and the role of meetings (ICCA, 2017). Secondly what it crucial to understand that all reports were prepared in a different way and using different statistical models (UNWTO, 2006). The prepared methodology was different in every country and the only similarity which could be noticed are three conditions under which all meetings were collected: 10 people, 4 hours and rented venue (UNWTO, 2006).

Lastly, it is very important that the elaborated study suggested new way of collecting the data and different approach and methodology of calculating the economic impact and the significance of meetings and events in national GDP. However, looking into the research, it is a must to admit that suggested model is a combination of business approach and scientific method which could be questioned by academic environment.

Entity type	Number
Organisers – customers	
corporations	746,000
associations	60,000
public institutions	100,000
Organisers – Intermediaries (agencies)	
event agencies	1,500
incentive travel agencies	100
PCOs / DMCs	50
trade fair organisers	16
Venues	
five-star hotels with conference facilities	57
four-star hotels with conference facilities	321
three-star hotels with conference facilities	1,108
congresses and conference centres (developed specifically for this purpose)	50
trade fair and exhibition centres	21
conference rooms in office buildings	421
institutions of higher learning	415
training and recreation centres	464
sport stadiums	2,386
sport and entertainment halls (with auditorium)	512
restaurants	18,000
cultural venues (institutions):	
- museums	926
- art galleries and salons	331
- theatres and musical institutions	177
- permanent cinemas	444
castles, palaces and manor houses	525
tourist highlights with venues available for hosting events	1,000

Figure 7. Number of entities creating the meetings market in Poland

Source: Celuch (2015a).

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WPLYW PRZEMYSŁU SPOTKAŃ NA GOSPODARKE – MODEL KRAJOWY NA PRZYKŁADZIE POLSKI

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przemysł spotkań, Polska, organizacje, gospodarka, PKB, organizacja

STRESZCZENIE

Celem przeprowadzonego badania było określenie znaczenia gospodarczego spotkań i wydarzeń (np. społecznych, gospodarczych, biznesowych) organizowanych w Polsce i pokazanie ich wkładu gospodarczego. Pytania badawcze dotyczyły struktury wydatków uczestników spotkań i wydarzeń, produktu krajowego brutto wygenerowanego dzięki przemysłowi spotkań w Polsce oraz liczby miejsc pracy utworzonych w celu świadczenia usług na spotkania i wydarzenia w Polsce.

W trzystopniowej analizie projektu przeanalizowano trzy grupy interesariuszy: uczestników, organizatorów spotkań i wydarzeń (siedem kategorii) oraz administratorów obiektów (dwanaście kategorii). Cel został osiągnięty dzięki zebranych danym i modelowi ekonometrycznemu opartemu na danych Głównego Urzędu Statystycznego, zbudowanym specjalnie w celu określenia wpływu przemysłu spotkań na gospodarkę narodową. Badanie oszacowało wkład przemysłu spotkań w PKB na poziomie 1%. W 2015 r. spotkania i wydarzenia wygenerowały 25 913 311 000 zł dla polskiej gospodarki i 11 960 058 000 zł wartości dodanej brutto. 12 401 600 uczestników krajowych i międzynarodowych wzięło udział w spotkaniach i wydarzeniach, które trwały średnio dwa dni. Wkład zatrudnienia w branży spotkań wyniósł 171 000.