POLAND CONFERENCE MARKET SURVEY

Polish Tourist Organization
Convention Bureau of Poland
2007



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INTRODUCTION

The Polish Tourist Organisation commissioned research into the actual and potential German and UK conference and incentive travel (C&I) markets for Poland, in order better to understand the characteristics of these important markets and to help determine what Polish destinations should do to attract more C&I business from companies and associations based in Germany and the UK.

This report provides the findings of the research that was undertaken between October and December 2007. The report is structured as follows:

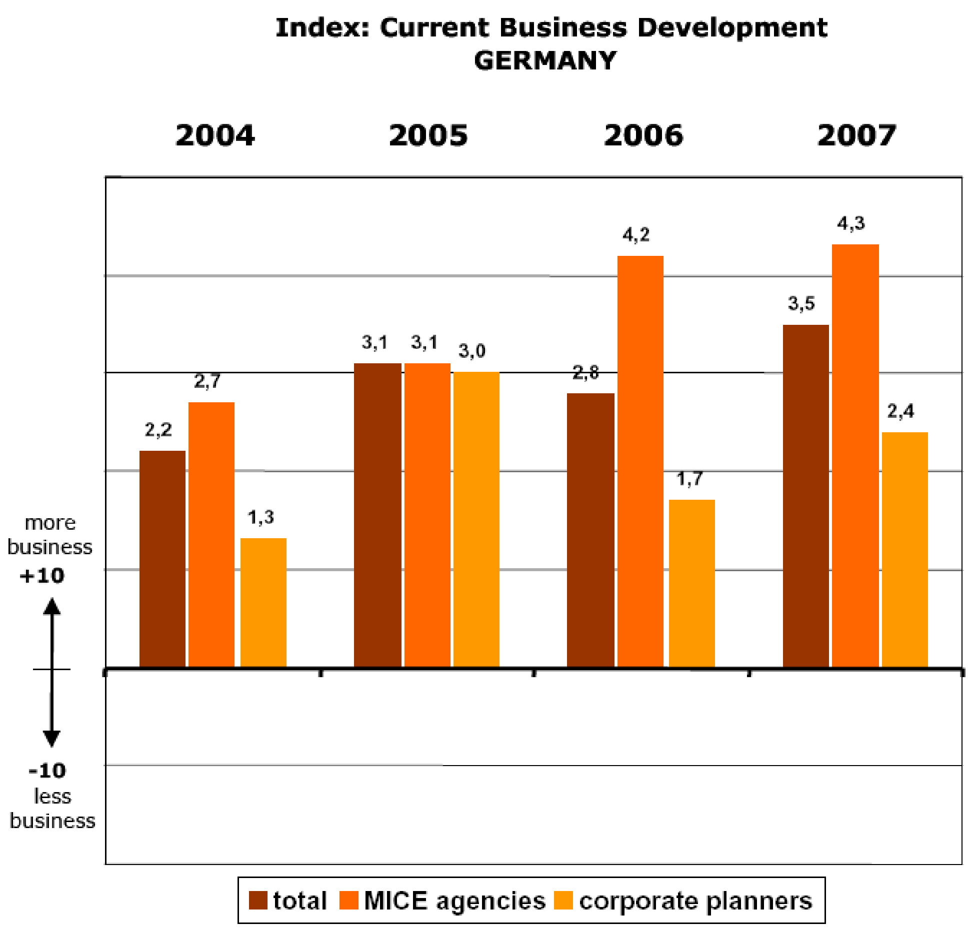
I. CHARACTERISTICS OF THE GERMAN AND UK OUTBOUND C&I MARKETS

1. The German outbound C&I market

The German outbound market for C&I is one of Europe's largest, as would be expected from one of Europe's most developed economies.

Characteristics of this market are given in The MICE Market Monitor which is an annual survey, undertaken by Travel Marketing Factory GmbH, on current trends in the outbound C&I markets of Germany, Austria and Switzerland. The 2007 results were based on the feedback of over 450 participants (agencies and corporate planners - 320 from Germany and 133 from Austria/Switzerland). Some of the most significant findings follow:

Source: Travel Marketing Factory GmbH



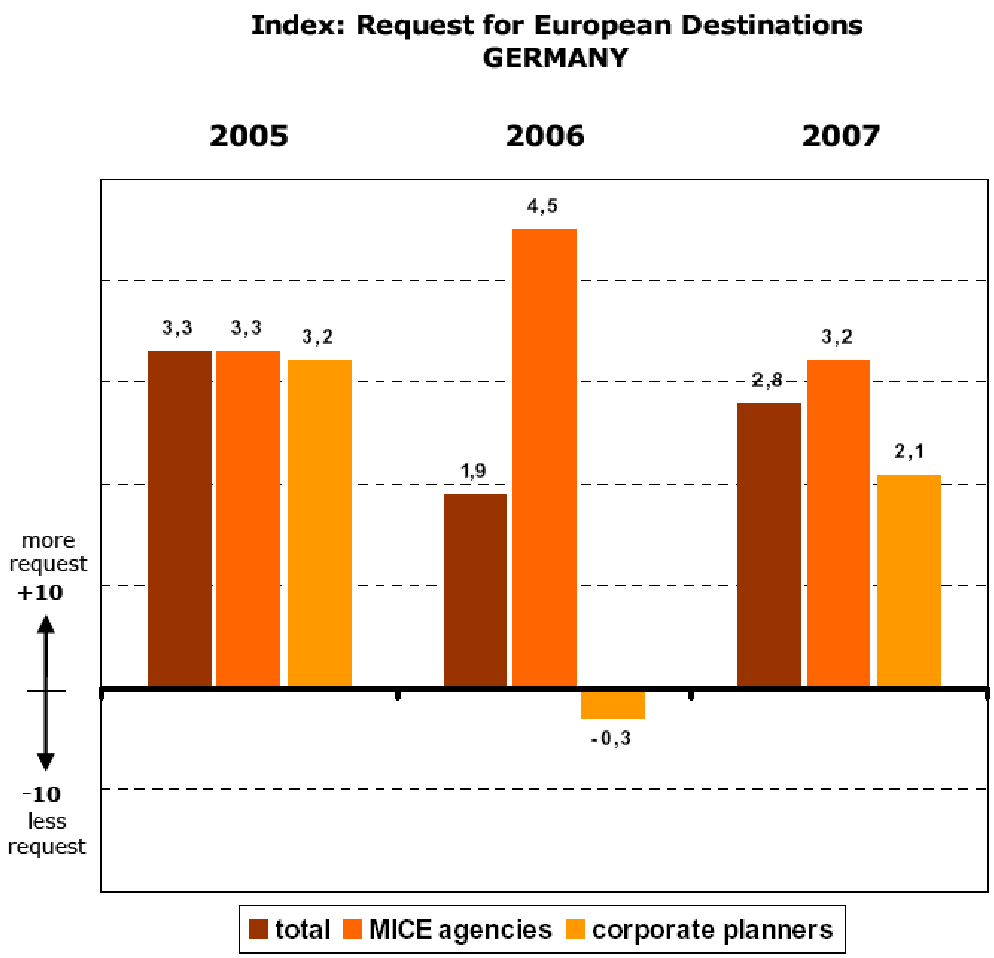
Growth in the volume of outbound corporate events:

Regarding the state of current business development in comparison to the last few years, the positive trend of the earlier years continues. In the German market, the highest index number for business development was reached since the first research was undertaken in 2004.

An increase in demand for European destinations for outbound corporate events:

The MICE Market Monitor 2007 index of the level of demand for European destinations shows significant growth in demand for corporate events held in European destinations, in comparison to the former years.

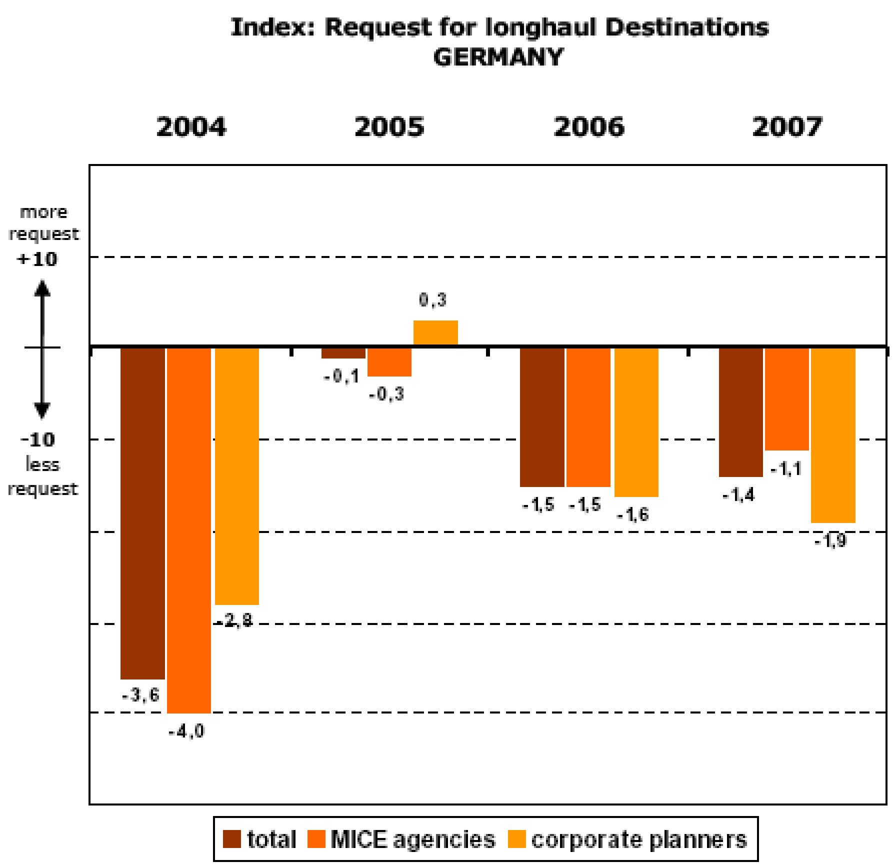
Source: Travel Marketing Factory GmbH



The volume of C&I business for European destinations remains at a high level in Germany. In 2006, the agencies showed a much higher demand than the participating corporate planners – a reason for this might have been the Soccer World Cup in Germany.

Slightly less demand for long-haul destinations:

In 2007 as well as in 2006, the C&I business from Germany into long-haul destinations showed a slight decrease. However, 16% of the survey participants reported an increasing request for long-haul destinations in 2007. China, India and other Asian destinations are mentioned frequently.



Source: Travel Marketing Factory GmbH

In their 2006 ‘German outbound C&I market’ study, Travel Marketing Factory GmbH identified a number of developing trends:

* German corporate planners show an increasing tendency to realise a significant part of their conferences, congresses and incentives by themselves as their experience and knowledge of destinations and locations is growing.

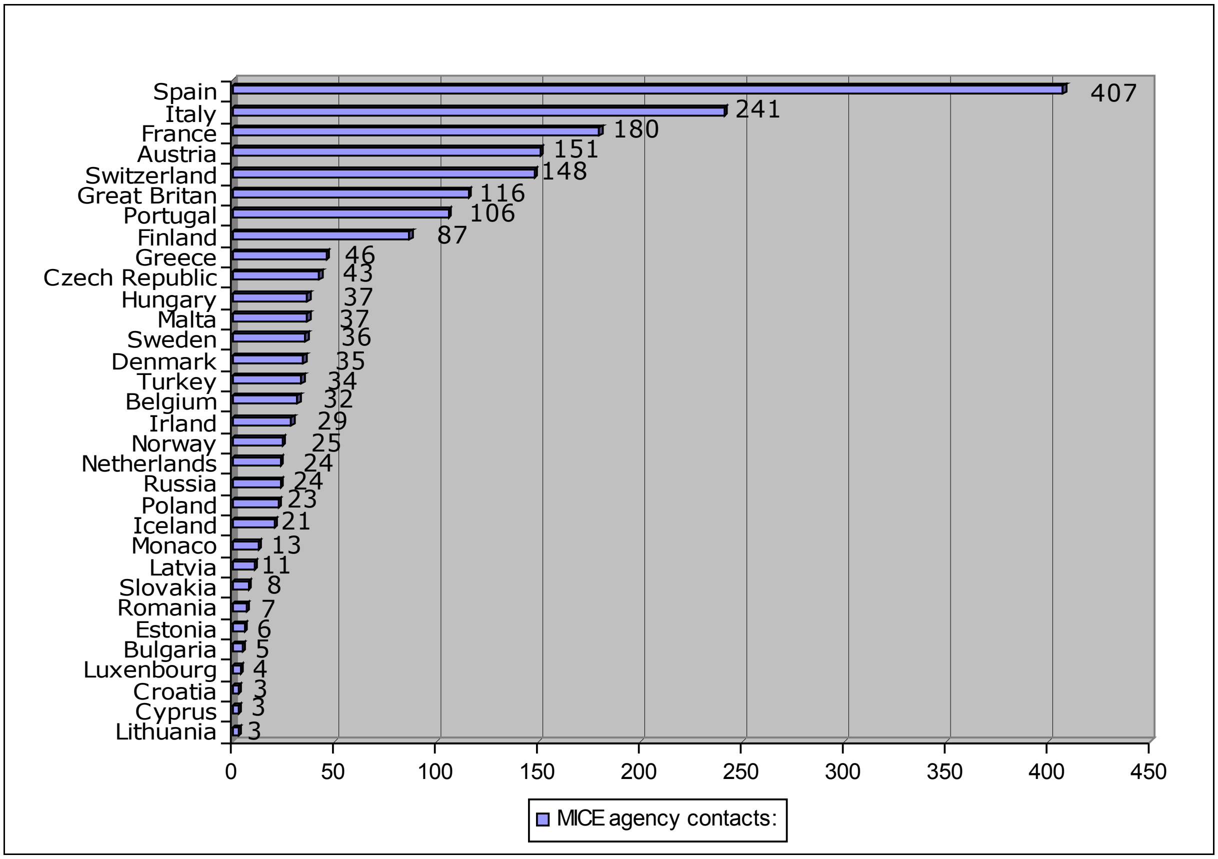
* Personal experience … is one of the most important criteria for the selection of a destination. Planners tend to repeat events in destinations which are known to them and to use locations, services and destinations which provided successful events to them or their clients in the past.

* Products and destinations new to the German C&I market need a strong and professional approach.

* The level of safety of destinations plays an increasingly strong role in planners’ choice of locations for their C&I events – as a reaction to such issues as terrorist attacks in European capital cities and kidnappings.

POLAND AS A DESTINATION FOR GERMAN C&I EVENTS

According to Travel Marketing Factory research, Poland was used as a destination for C&I events in 2006 by only 23 out of 474 C&I agents surveyed. This put Poland in 21st position behind some formidable competitors such as Spain, Italy and France, which are well established as C&I destinations for the German outbound market.

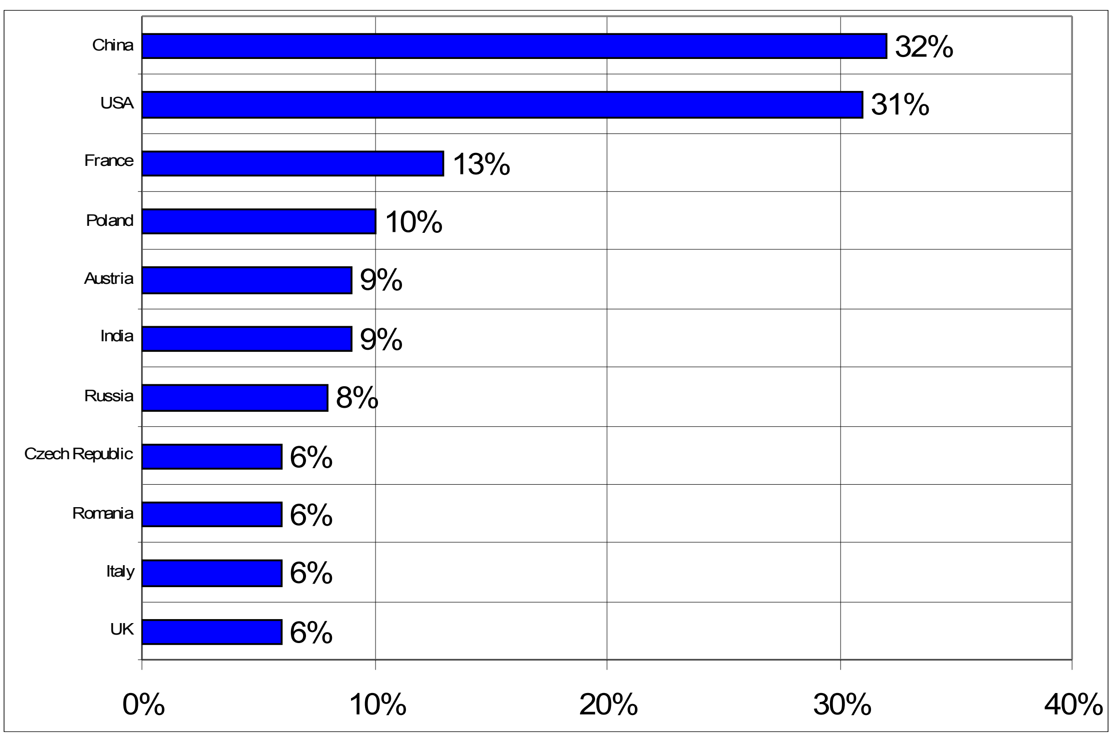


This low priority given to Poland as a C&I destination for German outbound events is in contrast with the much higher importance of Poland as a destination for business trips, for German companies. In the 2006 VDR Business Travel Survey, Poland was shown to be in 9th place in the top 10 foreign destinations for Germany's business trips. In the same year, Poland was estimated to be the country in 4th place in the list of countries expected to grow in importance as destinations for German business travelers – although Poland was a long way behind China and the USA. This expectation was no doubt partly founded on expanding German business investment in Poland.

Major foreign destination for business trips in 2005

Destination	
1.	USA
2.	France
3.	China
4.	UK
5.	Italy
6.	Austria
7.	Switzerland
8.	Spain
9.	Poland
10.	Netherlands

Countries destined to become more important for business travel in 2007



Source: 2006 VDR Business Travel Survey

2. The UK outbound C&I market

UK companies have a long tradition of holding their C&I events overseas. In particular, the vast majority of incentive trips are held abroad, as the domestic market for incentive trips in the UK is very weak – companies prefer to motivate their staff by offering travel to foreign countries. In addition, the UK is where the headquarters of many European associations are to be found, and these rotate their annual conferences around European countries.

The Trends & Spends Survey is carried out every year on behalf of the UK trade magazine, Meetings & Incentive Travel (M&IT), one of the country's most influential publications. M&IT's annual Trends & Spends Survey examines the activities of the major UK-based outbound specialist C&I agencies.

According to the 2007 survey, which refers to events held overseas in January to December 2006, Spain and France are still the top destinations, in the short-haul market for outbound C&I events from the UK. Paris and Barcelona are the two most popular cities. The only Central/Eastern European country to appear in the top 10 is the Czech Republic, with Prague continuing its popularity as a major destination for UK-based C&I groups.

The average group size for short-haul C&I events in the 2007 survey was 90 participants, and the average duration of such events was 2.6 nights. Both of these figures were lower than the figures in the 2006 survey; but the actual number of events organized by UK agencies was greater than the previous year.

Numbers in brackets indicate the country's / city's position in the 2006 Trends & Spends Survey.

Short haul by country by group			
		No. of groups	**As %**
1.	Spain (1)	124	19.4
2.	France (2)	87	13.6
3.	Italy (3)	62	9.7
4.	Germany (4)	60	9.4
5.	Switzerland (5)	37	5.8
6.	Netherlands (6)	34	5.3
7.	Belgium (9)	26	4.1
8.	Czech Republic (11)	25	3.9
9.	Republic of Ireland (15)	24	3.8
10.	Portugal (8)	23	3.6

Source: C&IT Trends & Spends Survey 2007.

Short haul by city/state/resort by group			
		No. of groups	**As %**
1.	Paris (1)	60	9.3
2.	Barcelona (2)	58	9.0
3.	Rome (4)	32	5.0
4.	Prague (6)	25	3.9
5.	Brussels (20)	24	3.7
5.	Amsterdam (8)	24	3.7
7.	Berlin (10)	23	3.6
8.	Madrid (13)	22	3.4
8.	Dublin (12)	22	3.4
8.	Monaco (19)	22	3.4
11.	Marrekech (14)	18	2.8
12.	Athens (13)	16	2.5
13.	Copenhagen (11)	15	2.3
13.	Vienna (19)	15	2.3

Source: C&IT Trends & Spends Survey 2007.

Short haul by city/state/resort by delegate nights			
		Delegate nights	**As %**
1.	Athens (1)	12,234	8.5
2.	Paris (3)	10,644	7.4
3.	Barcelona (4)	9,887	6.8
4.	Prague (14)	7,830	5.4
5.	Brussels (18)	6,707	4.6
6.	Berlin (2)	5,942	4.1
7.	Rome (8)	5,464	3.8
8.	Dublin (12)	5,393	3.7
9.	Lisbon (10)	4,441	3.0
10.	Copenhagen (15)	4,008	2.7

Source: C&IT Trends & Spends Survey 2007.

Short haul by country by delegate nights			
		Delegate nights	**As %**
1.	Spain (1)	19,662	13.6
2.	France (2)	18,431	12.8
3.	Germany (4)	14,442	10.0
4.	Italy (3)	13,566	9.4
5.	Greece (5)	12,414	8.5
6.	Austria (14)	8,772	6.1
7.	Czech Republic (12)	7,830	5.4
8.	Portugal (7)	7,811	5.4
9.	Belgium (10)	6,943	4.8
10.	Netherlands (18)	5,831	4.0

Source: C&IT Trends & Spends Survey 2007.

POLAND AS A DESTINATION FOR UK C&I EVENTS

Surveys of the destinations most used by UK meetings planners usually only look at the top 10, and Poland is not yet in that category. However, it may be fairly accurately estimated that, for the UK, Poland would be in a very similar position as for the German market (around 20th place) behind more or less the same countries.

It is very clear from the comments of the UK planners who participated in this survey that their interest in using Poland as a destination for their events is growing fast. Many of those who have not already used Polish cities for their C&I events reported that they would be doing so in the very near future.

The growth in popularity of Poland as a destination for UK business events has been partly fuelled by strengthening economic links between the two countries. According to the British-Polish Chamber of Commerce, 2006 was a record year for British-Polish trade, which grew by over 72% compared to 2005, a faster rate than for any major UK trading partner. Many British companies currently trading with Poland, whether importing or exporting, are entering into joint venture agreements or even making acquisitions with their Polish partner companies, and these economic links directly generate increasing demand for UK companies' corporate events held in Poland.

This is a trend with much scope for further growth. Britain is the world's second biggest foreign investor (after the US) but in Poland is currently only in sixth place. Rising UK corporate investment in Poland will continue, aided by the rising number of airline connections between the two countries (currently 300 flights per week) which in themselves also make Poland more attractive for UK companies' and associations' C&I events.

II. RESULTS AND ANALYSIS OF A SURVEY OF GERMAN AND UK C&I PLANNERS

Following the secondary research described in the previous section of this report, original primary research was undertaken in the form of an online survey of selected German and UK C&I planners. The aim of the survey was to produce a profile of planners' use of Poland as a destination for their events and to provide an indication of Poland's strengths and weaknesses as perceived by the German and UK outbound C&I market. Those strengths and weaknesses were to be used as the basis of the recommendations that follow in section three of this report.

Methodology: the objective was to solicit responses from 50 German and 50 UK planners, including both corporate and association events organizers, on the subject of the C&I events they had held in Poland from 01 January 2006. In order to achieve this target population, several sources were used, including membership databases of Meeting Professionals International (MPI), the Society of Incentive and Travel Executives (SITE) and the Association of British Professional Conference Organisers (ABPCO). In addition, a web-trawl was undertaken, using search-engines and key words such as 'conference' + 'incentive' + 'Poland' + '2006' + '2007', both in English and in German. This proved to be an effective way of identifying planners who had used Poland for one or more C&I events in the survey period of the past 24 months.

Over 550 general e-mail messages were sent to German and UK planners and 65 specific messages (mentioning the name(s) and date(s) of the event(s) they had organized were sent to those planners identified from the web-trawl. Communication with planners thus identified was in two stages: the initial e-mail message informed them of the aim of the survey and invited them to reply giving their permission to have the link to the online questionnaire sent to them; the second message, sent to those planners accepting the invitation to participate, included the direct link to the online questionnaire. The questionnaire was anonymous, to ensure that planners' responses were as full and as frank as possible. To complete the survey and identify further areas of weakness for Poland as a C&I destination for the German and UK markets, a supplementary questionnaire was sent to planners who had never used Polish cities. In this way, further ideas for areas in which Poland needs to improve were identified.

The great majority of people who responded were employed full-time by the company or the association actually holding the event. Only a small minority were working for agencies or for their own companies as independent PCOs. The rationale was to focus mainly on people who have direct responsibility for choosing the destinations for their company's or their association's events.

The balance of respondents finally achieved was weighted in favour of association planners, as a result of the web-trawl technique, which most probably yielded a disproportionate number of association planners (whose events appear more often on websites than corporate planners' events do). Association planners were more prevalent in the UK sample, as a result of the number of European and global associations with their headquarters in London and in other UK cities. However, despite this, differences in responses from German and UK planners were not generally found to be significant. Therefore in the following analysis of the questionnaire results, their responses have been combined. In those cases where a significant difference did emerge, this has been noted in the discussion.

RESULTS AND ANALYSIS OF THE SURVEY

How many and what type of events had planners organised in Poland since 01 January 2006?

Just over 80% of planners had organised only one event in Poland during this period. 3 was the maximum number of events organised in Poland by any of the planners surveyed. Just over 50% of those were international/European association events, with corporate, incentive trips and academic events following further behind. 'Other events' mentioned by planners included training sessions, academic conferences and networking events. A few of the events were held (by UK companies) for the purpose of recruiting Polish staff for UK jobs. Such events were small and were generally held in hotel seminar rooms. No product launches were included in the sample.

How many participants?

There were events in most of the categories across the spectrum, from small (corporate) meetings to association events with over 200 participants.

11-30	31-50	51-70	71-90	91-110	111-200	Over 200
19%	0%	25%	6%	6%	13%	31%

(Numbers have been rounded)

The largest events, which accounted for almost 1/3 of all events covered, were almost entirely annual conferences of European/international associations, with participants from several countries. At the other end of the scale, events between 11 and 30 participants were divided between management training meetings and incentive trips. German planners' events were, on the whole, smaller and shorter than UK planners', but this is most likely linked to the fact that the association market was more represented in the latter.

How many nights?

0	1	2	3	4
12%	7%	6%	56%	19%

(Numbers have been rounded)

Although a small minority of events lasted 0 or 1 night (mainly those of German planners), the vast majority lasted for 3 nights – by far the most popular length of event. The shorter events were overwhelmingly corporate meetings and the longer events were generally international/European association events.

Where did the events take place?

Warsaw was the city most used by the planners, with 42% of all events taking place there. The other city frequently used by the UK and German planners was Krakow, which was the destination for 36% of the events in the survey. Gdansk, Wroclaw and Poznan were the destinations for 3 events each, while Bydgoszcz, Katowice, Lodz and Szczecin each hosted one of the events covered in the survey.

The high concentration of events held in Warsaw and Krakow would be even greater if the numbers of participants are taken into consideration, because those two cities between them hosted the vast majority of European/international association conference, which attract most delegates.

Which other destinations were considered?

Most (62%) planners stated that they did not consider other destinations for the events they held in Poland. This was often the case where the event was being held due to a business connection with Poland, in which case the destination was determined by the location of that business.

Where other destinations were in the competition to host the event, the countries and cites most frequently cited by the planners were:

- in the case of Warsaw: Germany, Czech Republic, Estonia, Italy, Belgium and **Krakow.**

- in the case of Krakow: Czech Republic, Vienna, Salzburg and **Gdansk**.

From the inclusion of other Polish cities in the lists of competing destinations, it is clear that a degree of internal competition exists, and this would appear to be particularly the case when an international association decides to hold its annual conference in Poland and considers more than one city as a destination. However, it is evident that Poland as a country faces formidable competition from a great number of other countries that are more established in the C&I market and particularly favoured by UK and German events planners, as discussed in Section One of this report. A full list of the other destinations used by the survey respondents for their events in the past 24 months is given in Appendix 1.

Planners’ reasons for choosing Poland

	Mentioned by % of respondents
Value-for-money	74
A business connection with Poland	58
Heritage and history	58
Existence of specific activities/attractions	51
Previous experience of using Poland as a destination	42
Proximity	34
Level of service	33
Lobbying by a Poland-based contact	33
Other desired destinations were unavailable	32
Transport connections	25
A cultural connection with Poland	25
Novelty value	20

Planners were asked to give their ‘most important reason’, their ‘second most important reason’ and their ‘third most important reason’ for choosing Poland as the destination for their event(s).

‘Value-for-money’ was the reason most often cited by planners, with almost ¾ of the sample mentioning that factor. Almost ¼ of planners give value-for-money as their most important reason for choosing Poland. However, overall, ‘A business connection with Poland’ was the single factor most often given as the ‘most important reason’ for choosing a Polish destination. ‘Heritage and history’ were mentioned frequently as secondary and tertiary factors, but only 8% of the sample mentioned it as their most important reason.

It is encouraging that 42% cited ‘Previous experience of using Poland as a destination’ as one of their three most important reasons for choosing Poland. This suggests that although just 80% of the sample has organized only one event in Poland in the past 24 months, a high proportion had organized events in Poland prior to that period – and the experience had encouraged them to return.

'Novelty value' was mentioned by 20% of planners as a motivating factor in choosing Poland – in other words Poland was being used because it was a new destination for the event in question (One UK planner commented: 'We had never used the destination for this type of event'). In one case, Gdansk's geographical location proved to be an attractive factor (A German planner commented: 'We hoped to attract more delegates from Sweden so, being just across the Baltic, Gdansk seemed a good choice'). The majority of planners mentioning 'Novelty value' as a reason were working for associations – clearly, by holding their event in a Poland for the first time, they also hope to attract new Polish members for their association.

Planners' principal sources of information on opportunities for holding events in Poland

	Mentioned by % of respondents
Personal contact(s)	**58**
Polish Tourist Authority official(s) based in Poland	**42**
Hotel employee(s)	**35**
Polish Tourist Organization official(s) based in the UK/Germany	**33**
Professional association contact(s) (MPI/SITE/ICCA/DMAI)	**32**
Trade show	**31**
Individual city's Convention Bureau website	**26**
Polish Tourist Organization website	**25**
Venue employee(s)	**24**
Magazine	**17**
Individual city's Convention Bureau official(s) in Poland	**16**
Other source(s)	**8**

By far, 'personal contacts' were cited by most planners as being their major source of information on Poland. In the case of the UK market, many of these personal contacts were other UK planners who had previously used Polish cities for their events. The value of 'word-of-mouth' recommendations cannot be over-estimated, particularly for emerging destinations such as Poland. UK planners are generally considered to be more conservative than their German equivalents and they need considerable reassurance from their peers, when they are considering a new destination.

The prominent role played by hotel employees as a source of information for planners is a tribute to the dynamism and professionalism of these people in dealing with international events in Poland. It also suggests that planners – particularly those using international hotel chains with properties in Poland – depend to a large extent on hotel sales and marketing staff for the information they need.

It is interesting to note the importance of professional association contacts as a source of information. Participation in these international associations allows for considerable scope for informal networking between planners and suppliers. The most frequently mentioned 'other source' was the Warsaw Destination Alliance, which several respondents distinguished from Warsaw Convention Bureau.

Planners' use of the services of Polish CVBs (Convention and Visitors Bureaus) and DMCs (Destination Management Companies) in Poland

36% of those surveyed used the services of Polish CVBs for at least one purpose; but only 8% of the planners (mainly UK) used the services of a Polish DMC. In the latter case, this happened primarily in the case of association events, which tend to be more complex and are therefore more likely to require local expertise in their planning.

For those planners using either or both of a CVB and DMC, these are the percentages of them requesting particular services:

	CVB	DMC
Getting tourism material for your participants	38	12
Finding suitable accommodation at the destination	30	40
Finding ideas for entertainment/local restaurants/excursions	27	38
Finding a suitable venue for your event(s)	27	28
Finding a local DMC (destination management company)	22	-
Finding local guides	20	22
Finding interpreters	12	12
Finding technical assistance	8	10
Finding suitable transport at the destination	8	25
Finding other staff to work on the event(s)	8	22
Getting local sponsorship for your event(s)	8	8

It is clear that there is considerable overlap in the services requested from, and provided by, both CVBs and DMCs in Poland. This is almost certainly a result of certain city-level CVBs in Poland assuming some of the roles normally undertaken by DMCs, in addition to their primary roles of marketing the destination and winning events for it. In many other countries, logistical activities connected with events being held in a particular destination would be handled more or less exclusively by DMCs based there.

Planners' levels of satisfaction with services and facilities in Poland

The percentages in this table indicate the levels of satisfaction and dissatisfaction of planners:

	Very satisfied	Quite satisfied	Quite dissatisfied	Very dissatisfied
Airline	42	44	8	6
Airport: appearance	25	68	7	0
Airport: service	19	35	40	6
Transfer	29	58	13	0
Hotel: welcome	58	38	0	4
Hotel: appearance	40	51	9	0
Hotel: service	50	42	8	0
Hotel: sleeping accommodation	48	52	0	0
Hotel: food and beverage	62	30	0	8
Venue: appearance	51	49	0	0
Venue: service	70	25	5	0
Venue: technical equipment	40	38	22	0
Venue: technical services	40	32	28	0
DMC services: pre-arrival	25	66	9	0
DMC services: post arrival	38	72	0	0
Tour guides services	70	26	4	0
Interpreter services	72	38	0	0
City restaurants: variety available	53	47	0	0
City restaurants: food quality	50	38	12	0
City restaurants: service	60	36	4	0
City entertainment	37	46	10	7
Shopping: variety available	28	58	14	0
Shopping: service	59	35	6	0
Excursion opportunities	38	58	4	0

(Numbers have been rounded)

While generally, the results are encouraging for Polish facilities and services, there is clearly scope for improvement in some aspects of supply. For example, although the airlines serving Polish cities score fairly highly, the planners' impressions of service at some of Poland's airports clearly needs to improve. One UK planner commented, of Gdansk airport: 'Check-in was excellent. My only complaint was that we were not permitted to shop at the airport duty-free shops - even after our luggage was checked. This seemed an unnecessary restriction and lost the shops much business on sales of vodka etc. The customs police were too strict and gave a bad impression'.

In general, hotels scored well, and a few planners commented on their quality – for example: 'The Sheraton Hotel Krakow: very good accommodation'.

However, some venues were found to be lacking, in particular concerning the quality of their technical equipment and related services. No venue was specifically mentioned by name in this respect. Planners were generally more likely to name facilities that had pleased them. For instance, one UK planner commented: 'The University of Krakow as conference venue: very helpful and friendly staff'.

Planners with no experience of using Poland as a destination for their events.

In a separate survey, UK and German non-users of Poland as a destination for their events were asked to give reasons for this. The sample for this survey was 36 planners, with the balance in favour of those based in the UK. They were asked to indicate their main reasons for not using Poland as a destination for their events.

Lack of information on Poland as a destination for C&I events was the outstanding reason given by non-users. UK planners in particular expressed the view that coverage of Poland in the UK trade press was minimal. 63% stated that they had never read about Poland in the trade press (Germany and the UK). Only 25% of respondents had ever visited Poland for leisure (Warsaw, Krakow, Gdansk, Sopot, Poznan); and only just under 20% had visited Poland for professional reasons such as a familiarization trip (Warsaw, Krakow, Gdansk, Sopot, Wroclaw). Other factors preventing planners from using Poland were: 'No previous experience of using Poland as a destination' and 'No business connection with Poland'.

Answer Options	Response Percent
Lack of information on Poland as a destination for events	43%
No previous experience of using Poland as a destination	40%
No business connection with Poland	29%
Poor image	25%
Stronger competition from other destinations	25%
Lack of suitable hotels	7%
Lack of suitable venues	7%
Lack of DMCs	4%
Too far	4%
Language difficulties	4%
Poor catering	4%
Lack of activities/attractions	4%
Poor transport connections to Polish cities	4%
Poor transport within Poland	0%
Poor level of service	0%
Poor value-for-money	0%
Lack of heritage and history	0%

(Numbers have been rounded)

The ‘poor image’ factor needs further investigation (and it must be determined to what extent ‘poor image’ means ‘no image’). One planner (German) commented: ‘We offer Poland a lot and see it as upcoming destination, but companies still have a problem with the image. But it’s getting better’.

Another German planner commented: ‘I think Poland is certainly seen as an emerging market. We do have an event from one of our Swedish offices now planned in Warsaw. I think it is only in relatively recent times that there have been major advancements in the international range of hotel accommodation. In terms of conference venues for association meetings, it is my impression that the only venue large enough really is the Trade Fair Centre, which involves quite a lot of costs to construct conference halls’.

However, even among non-users, there were indications that reluctance to plan events in Poland was diminishing. A few comments indicated this: ‘I have not considered Poland as a destination, in line with client’s objectives. However Poland may become an option in future according to client’s requirements’; and ‘Time and budgetary constraints (have prevented me using Poland). Hope to use next year’.

Three UK planners of corporate events commented as follows:

'Poland has been left behind in meeting planners' minds, while other destinations have made progress. Prague, Budapest and Vienna are particularly dominant venues and therefore competitors for Polish cities. Warsaw is an attractive city but its efforts to promote itself are fairly recent and it has much to do, to catch up. The city has no obvious Unique Selling Point. While there is an interesting old centre and restaurants and cafes have improved it lacks the atmosphere of the three above destinations. Regeneration, which has started to happen, especially around the Central Station and People's Palace precinct will generate more interest, but international media has to talk about it in glowing terms so as to stimulate the minds of events planners, incentive and association events organisers'.

'I used to run small meetings in Poland but the business connection has now gone. I enjoyed working in Poland. The people can be very nice and it is an interesting country with some really nice cities. Conditions have improved a lot in the last decade and the country has a lot to offer if marketed correctly'.

'I have never actually organised an event in Poland although it has been considered and I would like to do something on a small scale next year'.

Communicating with UK and German planners

Planners from both countries were asked about the trade shows that they attend and the magazines that they read regularly.

Which trade shows do you attend on a regular basis?	
Answer Options	**Response Percent**
Confex	74.0%
EIBTM	68.0%
EMIF	20.0%
IMEX	64.0%
IT&ME	8.0%
World Travel Market	36.0%
Other (please specify)	20.0%

The high percentage of respondents attending International Confex in London is accounted for mainly by the influence of the UK participants surveyed. As would be expected, a higher proportion of German planners attended IMEX than EIBTM. 'Other' trade shows were attended by small numbers of respondents, and were generally held outside Europe (GIBTM, etc). Twelve respondents mentioned that they had attended the Business Tourism Fair in Warsaw once each, but were not regular participants. 26% of respondents said that they had previously visited the Poland stand at an international exhibition, and these responses were evenly divided between EIBTM and IMEX.

Which magazines do you read on a regular basis? (UK responses)	
Answer Options	**Response Percent**
AMI	12%
Conference & Exhibition Fact Finder	8%
Conference & Incentive Travel	42%
Conference News	22%
ITMC	16%
Meetings & Incentive Travel	48%

Which magazines do you read on a regular basis? (German responses)	
Answer Options	**Response Percent**
AMI	18%
CIM Magazine	40%
Tagungs Wirtschaft	35%

Conclusions of the survey:

The Poland Conference Marketing Survey provides a valuable up-to-date profile of how UK and German meetings and incentives planners perceive Poland and how they currently use it as a destination for their events. The Survey concludes that both the UK and the German market regard Poland as an emerging destination that has made considerable progress in the past decade in terms of access and infrastructure for events, and their interest in using Polish cities for their conferences and incentive trips is growing steadily. Warsaw and Krakow are by far the principal destinations currently used by UK and German planners, but interest in other Polish cities is expanding. However, Poland faces considerable competition from other Central European destinations, in particular Prague, Budapest and Vienna, as well as countries such as Spain, France and Italy, which are more established in this market. UK and German planners who have used Poland for their events are generally satisfied with the experience, but there is potential for improvement in some aspects, particularly in how some Polish cities are marketed internationally.

III. RECOMMENDATIONS FOR THE POLISH TOURIST ORGANIZATION AND FOR INDIVIDUAL CITY CVBs IN POLAND

The preceding primary and secondary research suggests that despite the importance of the UK and German outbound C&I markets, Poland has not yet reached its full potential as a destination for these countries' corporate and association events.

No European country may claim to be fully successful in the C&I market unless it receives significant numbers of events from these two countries that are among the biggest economies in Europe and which are both (unlike France, for example) major consumers of C&I events held outside their frontiers. But while there is a long tradition, in both Germany and the UK, of planners taking C&I events abroad (including to other Central European countries such as Hungary and the Czech Republic), Poland has not yet become established as a regular destination for the UK and German C&I market.

It is clear that Poland faces a number of considerable competitors for UK and German C&I business. Countries such as Spain, France, Italy and Portugal, even though they are extensively used as holiday destinations by UK and German citizens, are still extremely popular as destinations for corporate events, despite (or perhaps because of) their familiarity. In addition, international competition, even within Europe, is growing fast. The Baltic countries have succeeded in establishing themselves on the radar of international events planners; and there are new countries such as Serbia and Romania entering the market. Beyond Europe, countries such as China and South Africa are set to increase their popularity as C&I destinations, due to the forthcoming Olympic Games and the Soccer World Cup respectively.

In the face of such competition, what can Polish CVBs do, to increase their visibility and attractiveness for the key UK and German markets?

The research undertaken for this report has highlighted a number of challenges. A few of these are beyond the immediate control of PTO and Polish cities' CVBs, but many of these challenges can also be met by introducing solutions that do not involve heavy costs. This report concludes with the following recommendations which may provide guidelines for the future activities of Polish CVBs:

* Increasing the level of professionalism of CVB staff. A number of opportunities exist for improving the skills and knowledge of CVB staff. Valuable training courses are offered by the international professional associations in this industry, such as International Congress and Convention Association (ICCA) and Destination Marketing Association International (DMAI), who run short courses in destination sales techniques, for example. Such courses offer CVB staff the opportunity to market and sell their destinations more effectively using advanced techniques and tools.

* Increasing membership of international associations in the C&I industry. Membership of such associations as MPI, DMAI, SITE sends out a clear signal to the C&I community that Poland is serious about establishing itself as a destination for international events. The networking opportunities that such associations offer are extremely valuable in improving Poland's profile in the industry. The creation of a Polish chapter of MPI/ICCA/SITE would be a great step forward.

* Increasing visibility in the trade press. Both Germany and the UK have C&I magazines that are extensively read by planners in search of information and ideas. In the past year, a few Polish cities have successfully managed to get coverage in the C&I press (for example, a detailed article on Wroclaw in the German CIM magazine in November 2007); but there is much scope for increasing such coverage. Press trips play an important role in bringing foreign specialist journalists into Poland, and these should be considered (in particular for the most popular C&I magazines) – and preferably NOT combined with fam trips. Fam trips also have a role to play, but the

needs of planners in such trips are different to the needs of journalists.

* Increasing confidence in German and UK planners. Word-of-mouth communication from other planners is a key source of information for planners considering using any new destination for their events. In their publicity material and on their websites, Polish CVBs should make maximum use of testimonials from satisfied clients. They should actively seek testimonials from UK and German clients who have held successful events in their cities.

* Using members of the local population to attract events. All major Polish cities have at least one university, with professors who are members of national and international associations relating to their field of study and research. The creation of an 'Ambassadors Programme' has already been successfully pioneered by Wroclaw CVB, who have recruited professors and scientists who are active in their professional associations, in order to persuade them to bring future association meetings to their own city.

* Increasing cross-selling. The survey indicated that having business links with the destination is often a reason for holding C&I events there. It is clear that many Germans make short business trips to Poland, linked to German investments in that country and other business links. Much more could be done to persuade these business guests to return and hold their companies' C&I events in Polish cities. This would increase business for hotels, as well as for other venues in the city. Hotels at the very least need to distribute C&I literature to business guests, to persuade them to consider their destination for future events.

* C&I statistics. Effective market intelligence is essential to guide Poland's C&I industry and to benchmark Poland against its competitors. National and local statistics should be collected regularly for this purpose – and communicated to organizations such as ICCA and the UIA so that Poland can be positioned in their statistics.

IV. APPENDICES

1. A list of the non-Polish destinations used by the survey respondents for their events

This table indicates the cities mentioned by the UK and German planners as the destinations they have used overseas for their events during the past two years. The continuing popularity of France, Spain and North America is evident. Other European capital cities such as Copenhagen, Prague, Amsterdam, Lisbon, Athens and Vienna are also formidable competitors in this market. North American cities are likely to increase in popularity for European planners if the value of the dollar remains low.

FRANCE/MONACO	**NORTH AMERICA**	**SPAIN**
Paris Monte Carlo Lille Marseilles Juan Les Pins Cannes Nice St-Tropez	New York Boston Miami San Francisco Orlando Los Angeles Chicago Grand Rapids Quebec	Barcelona Madrid Tenerife Marbella
ITALY	**GERMANY**	**UK AND IRELAND**
Milan Rome Venice Sardinia Florence	Berlin Dusseldorf	Dublin London Birmingham

OTHER EUROPEAN CITIES	SOUTH AMERICA	MIDDLE EAST/FAR EAST
Copenhagen Prague Amsterdam Lisbon Athens Vienna Helsinki Brussels Malta Istanbul Antwerp Antalya Moscow Kiev Bern Stockholm Geneva Budapest Tallinn	Rio de Janeiro Sao Paulo	Dubai Mumbai Goa Shanghai Hong Kong Macau
AFRICA	**AUSTRALIA**	
Marrakech Morocco Cape Town Durban	Sydney Brisbane	

2. SWOT analyses of Polish cities as C&I destinations

The SWOT analyses of Polish cities were produced in collaboration with the local CVBs and staff working in these offices. The characteristics of each CVB were evaluated and summarized by the authors to provide an indication of the image of each city and to show its advantages and disadvantages in comparison with the others. A number of issues (for example, Schengen, EURO 2012) were found to be applicable to several different cities.

Bydgoszcz

Strengths	**Weaknesses**
• development of an International Airport • transformation towards a high-tech city – IT investors • the area is available for new projects in manufacturing, services and housing • high level of entrepreneuship and thriftiness among Bydgoszcz citizens • excellence in sport, with many high level events taking place in the City • prominent position as one the country's strongest centres for music – Opera Nova, Pomeranian Philharmonic, Music Academy • wide variety of the higher education offer – two universities • secession architecture in the city centre • many green areas • the inland navigation junction unique on a European scale	• low identity and knowledge of the city in Poland and abroad • insufficient finances for development tasks • insufficient road infrastructure • pauperization processes among part of the population, accompanied by a widening economic gap • deterioration of much of the housing resources and infrastructure and a high proportion of low-quality public space • lack of accommodation/ venues/PCOs

Opportunities	Threats
• Poland's membership of the European Union and the opportunity for acquiring funds to finance tasks from EU funds • development of infrastructure in European transport corridors, particularly on waterways • projects in various fields of the economy by investors from outside, particularly in high-tech • reform of public finances and improved profitability of business activities • creation and growth of the Bydgoszcz – Toruń conurbation	• delayed infrastructural projects of national importance • insufficient progress in the reform of public finances • economic barriers to the accessibility of medical, educational and cultural services • failing to use the opportunities offered by integration with UE to improve living standards and develop the economy • unfavourable demographic processes

Toruń

Strengths	Weaknesses
• central location in Poland • good road connections to Warsaw, Gdańsk • good local transport system (trams, buses) • UNESCO heritage (sites of historical interest) • Nicolaus Copernicus University (UMK) • human resources – local inhabitants open to tourists • 40000 students – a young city	• the education system is not appropriate to the tourism industry • low knowledge of this city in the UK • weak transport links from the UK • lack of places where it is possible to use Internet for free (wi-fi, spot) • low level of technical infrastucture for new investors • low level of roads

• great educational possibilities • many non-government instutotions, foundations • interesting historical venues: City Hall, Dwór Artusa	• no 4* and 5* hotels • not enough hotel rooms • no local conference centre • no professional CVB – still in process of establishing
Opportunities	**Threats**
• good atmosphere for new ideas connected with tourism • investment-attractive city • building the highway • possibility of creating new education levels/faculties • cooperation with Bydgoszcz • hundreds of events per year organized by the University UMK • presence of big companies: Sharp, TZMO, Nestle • candidate for European Cultural City 2016	• lack of professional marketing campaign by local government • the image of the city for 1 night, stop and go • lack of night-time attractions • lack of car park places close to the Old Town

Gdańsk

Strengths	Weaknesses
• location (seaside) • history (many monuments, Solidarity heritage) • as yet undiscovered and unknown city in comparison to other European cities • airport has connections to the north of Europe and main European cities • many activities possible (biking, sailing, green areas, parks etc.)	• road infrastructure • lack of conference and accommodation venues for big conferences (1000+ pax) • PCO and business travel companies do not yet understand how to cooperate with GCB – lack of promotion in local branch

Opportunities	Threats
• EURO 2012 • many investments in road infrastructure • developing harbour and airport • city awareness of business tourism opportunities • significant EU funding for public transport • plans to build large capacity conference-fair-congress venue	• EURO 2012 • no cooperation between local branches

Kraków

Strengths	Weaknesses
• 750 years' historical heritage • 5.977 historical monuments (museums, theatres, churches) • International Krakow airport – Balice (48 cities with direct connections) • main tourist attractions: main market square and Kazimierz district. • high levels of inbound foreign tourists. • good promotion by the city • well-known incentive destination	• no conference centre for 2000+ pax • road infrastructure should be better • low productivity of some districts in the city (outskirts) • delay in most investments

Opportunities	Threats
• EURO 2012 – because of more investments, more road, more flights. • cooperation with other cities: Wroclaw, Warsaw, Gdańsk • Schengen • new tourist products • new congress centre	• problems with road transport. • changeable political situation. • competition from other cities

Wrocław

Strengths	Weaknesses
• location in the south-west of Poland, close to Berlin and Prague. The road infrastructure is part of the Third Pan-Europan Corridor • city development; new local businesses and foreign companies investing and hiring. • Wrocław and Lower Silesia are most successful in Poland in terms of attracting EU funds. • Direct flight connections: 21 direct flights to European cities. • The Copernicus Airport Wrocław will open a new terminal by 2011, increasing the capacity of the airport by 7million passengers per year. • Active promotion office of	• poor road infrastructure: no highway between Wrocław and Warsaw, no bypass around Wrocław • huge traffic jams in the city and around it • small airport; not enough direct flight connections • lack of accommodation: only 5,672 beds in star- categorized hotels • lack of a big, modern congress centre; no fair grounds • insufficient local PCOs: events are organized by PCOs from abroad or from other Polish cities • statistical data; no professional statistics about events organized in Wroclaw

the Municipality of Wrocław • Dynamic Convention Bureau – Wrocław; • Mayor of Wroclaw: support and real understanding for business tourism • high quality promotion materials; brochures and catalogues, presentations and films. • ambition; Wroclaw is not afraid of bidding for huge events as EXPO, EURO.	
Opportunities	**Threats**
• EURO 2012: the improvement of road infrastructure the new stadium. • EU funds for development and promotion of the city and the region of Lower Silesia • hotel investments: 13 new hotels by the end of 2011, including two 5-star (Hilton), two 4-star hotels and 5 three-star hotels. • new Venues; Wratislavia Concert Hall, The South Center: • The Centennial Hall will be refurbished	• EXPO 2012, after the defeat of Wroclaw application to host EXPO in 2012 some people may think that Poland and Wrocław is a destination which can not be relied upon. • failure of infrastructural improvement; if the bypass is not finished soon there will be more and more problems with communication in and around Wrocław. • end of current mayor's mandate in 2010; the new candidate must continue the current policy or the condition of business tourism in Wrocław may dramatically change.

Poznań

<table>
<tr><th>Strengths</th><th>Weaknesses</th></tr>
<tr><td>
the biggest fairs centre in Poland (MTP)
good location
good train connections with Warsaw and Berlin
railway stations in the centre of the town, close to fairs
many historical palaces amoung the city (may be used for incentive trips)
Schengen
EU funds for promotion business tourism
more investments in post-industrial parts of the city
good promotion of the city
strong local economy
good universities
image of a business city
</td><td>
not enough hotel rooms, especially 4* and 5* hotels
not well known in major foreign markets such as the UK
Small airport; not enough direct flight connections
road infrastructure should be better
</td></tr>
<tr><th>Opportunities</th><th>Threats</th></tr>
<tr><td>
EURO 2012 – because of more investments, more road, more flights
Schengen (more investments especially from Germany)
EU funds for promotion business tourism
Poznan will host several major international conferences in next 3 years
international investments in hotel infractructure
</td><td>
problems with road transport
changeable political situation
competition from other cities
</td></tr>
</table>

Warszawa

Strengths	Weaknesses
• historical heritage • historical monuments (museums, theatres, churches). The largest number of museums in Poland. • centrally located in Poland • large concentration of companies (609 600 business entities including 16 800 with foreign capital) • 4.9 million population within Warsaw Airport catchment area • the largest Polish airport (over 100 destinations), over 52% share in total passenger traffic in Poland (in 2006), 8.1 million passengers served, 32 airlines (summer 2007), 36 countries (summer 2007) • main tourist attractions: Royal Route, Royal Castle, Wilanów Palace • high levels of inbound foreign tourists • central railway station in the town centre • city of knowledge (77 universities); young city, ¼ of Warsaw's population are people under 25 • safe, clean and cultural city • green city (21% total area are parks, forests) • City of Frederic Chopin • rich offer of various resturants	• lack of good promotion of the city • Warsaw has no conference centre capable of holding 7 thousand people • road infrastructure should be better • not enough budget accommodation • not enough recreational areas • delay in investments • weak weekend offer • two centres of the town (Old Town and area close to PKiN) • no good underground connections (only one line) • low budget for promotion of the city

Opportunities	**Threats**
• EURO 2012 – because of more investments, especially more road, more flights, new sport venues • cooperation with other cities: Kraków, Gdańsk • Schengen • modern shopping malls • new Copernicus Science Centre • new museums: (New Museum of Modern Art in Warsaw, New Museum of the History of Polish Jews) • International Chopin Information Centre • New hotels (6 properties: 3* and 4*)	• problems with road transport • changeable political situation • competition from other cities

3. SWOT analysis of Polish suppliers

Strengths	Weaknesses
• excellent language skills (English, German) • reputation for hospitality and high standards of service (demonstrated by Polish people working abroad) • distinctive and unique historical heritage: DMCs can use the history for selling their programmes • reputation for hard work and creativity in the workforce • high standard of workmanship • enterprising initiatives by private companies	• lack of professional education for the C&I industry • lack of meetings industry certification in the workforce (CMP - Certified Meeting Professional, CMM - Certification in Meeting Management, CITE - Certified Incentive Travel Executive) • low levels of participation in meetings of international C&I associations • lack of strong relations between local DMCs • stressful working environment at times in the C&I sector • insufficient levels of clear demonstration of commitment to corporate social responsibility • insufficient experience of collaboration during the hosting of major C&I events • Polish food lacks a clear and distinctive image • airport security staff often look intimidating.
Opportunities	**Threats**
• optimism: the current generation of young Poles believe in positive change and wish to build new ideas in their country • major forthcoming events: the	• ongoing loss of talented people to other countries: many young people want to work abroad and some other EU countries need more manpower

Year of Frederic Chopin 2010, EURO 2012, EUROBASKET 2007, which will raise the profile of Poland as an events destination • Schengen zone –Poles can more easily get experience abroad, and graduate from foreign universities • change of national government means that Poland's international reputation now has an opportunity to improve • development of airports in some key C&I cities (Warsaw, Krakow, Wroclaw) • growing number of air-links with key C&I markets	• continuing high cost of some city-centre hotels, particularly international chains • growing competition from new C&I destinations

4. Questionnaire (English version)

1. Default Section

1. How many events have you organised in Poland since 01 January 2006?

Number of events

2. What type of event(s) have you held in Poland since 01 January 2006?

	Associate meeting	Corporate meeting	Incentive trip	Team-building event	Product launch	OTHER
Event 1						
Event 2						
Event 3						
Event 4						

If 'OTHER', please specify

3. How many participants attended your event(s) in Poland?

	Under 10	11-30	31-50	51-70	71-90	91-110	111-200	Over 200
Event 1								
Event 2								
Event 3								
Event 4								

4. How many nights did you event(s) last for?

	0	1	2	3	4	5	6	7	8 or more
Event 1									
Event 2									
Event 3									
Event 4									

5. Where did your event(s) take place?

	Bydgoszcz	Gdansk	Katowice	Krakow	Poznan	Szczecin	Torun	Warsaw	Wroclaw	ANOTHER destination
Event 1										
Event 2										
Event 3										
Event 4										

If 'ANOTHER DESTINATION', please specify

6. Your reasons for choosing Poland for your event(s).

Please mark 1, 2 and 3, where:

Your most important reason = 1
Your second most important reason = 2
Your third most important reason = 3

A business connection with Poland	[ ]
Previous experience of using Poland as a destination	[ ]
Proximity	[ ]
Transport connections	[ ]
Level of service	[ ]
Lobbying by a Poland-based contact	[ ]
A cultural connection with Poland	[ ]
Value-for-money	[ ]
Heritage and history	[ ]
Existence of specific activities/attractions	[ ]
Other desired destinations were unavailable	[ ]
Other reason.	[ ]

7. If you checked 'Other reason' in your answer to the previous question, what was that reason?

8. Your principal sources of information on opportunities for holding events in Poland.

Please mark 1, 2 and 3, where:

Your most important source = 1
Your second most important source = 2
Your third most important source = 3

Polish Tourist Authority official(s) based in the UK/Germany [ ]

Polish Tourist Authority official(s) based in Poland [ ]

Polish Tourist Authority website [ ]

Individual city's Convention Bureau official(s) in Poland [ ]

Individual city's Convention Bureau website [ ]

Magazine [ ]

Trade show [ ]

Hotel employee(s) [ ]

Venue employee(s) [ ]

Professional association contact(s) (MPI/SITE/ICCA/DMAI) [ ]

Personal contact(s) [ ]

Other source(s) [ ]

9. If you checked 'Other source(s)' in your response to the previous question, what were they?

10. Your use of the services of Polish CVBs (Convention and Visitors Bureaus) and DMCs (Destination Management Companies) in Poland.

IF you used the services of a Polish CVB and/or DMC in planning your event(s), which of the following did you receive assistance with?

	CVB	DMC
Finding a local DMC (destination management company)	☐	☐

Finding suitable accommodation at the destination	☐	☐
Finding suitable transport at the destination	☐	☐
Finding a suitable venue for your event(s)	☐	☐
Finding ideas for entertainment/local restaurants/excursions	☐	☐
Finding local guides	☐	☐
Finding interpreters	☐	☐
Finding technical assistance	☐	☐
Finding other staff to work on the event(s)	☐	☐
Getting authorisations from local officials	☐	☐
Getting local sponsorship for your event(s)	☐	☐
Getting tourism material for your participants	☐	☐
Other services	☐	☐

If 'Other services': please specify

11. In the following table, for your Event 1, please rate each of the services and facilities that you used. In the Comments Box at the end of the table, please give the reasons for rating any services or facilities as 'Quite dissatisfied' or 'Very dissatisfied'. Specify the name of the businesses falling into these categories.

	Very satisfied	Quite satisfied	Quite dissatisfied	Very dissatisfied
Airline	○	○	○	○
Airport: appearance	○	○	○	○
Airport: service	○	○	○	○
Transfer	○	○	○	○
Hotel: welcome	○	○	○	○
Hotel: appearance	○	○	○	○
Hotel: service	○	○	○	○
Hotel: sleeping accommodation	○	○	○	○
Hotel: food and beverage	○	○	○	○
Venue: appearance	○	○	○	○
Venue: service	○	○	○	○
Venue: technical equipment	○	○	○	○
Venue: technical services	○	○	○	○
DMC services: pre-arrival	○	○	○	○
DMC services: post arrival	○	○	○	○
Tour guides services	○	○	○	○
Interpreter services	○	○	○	○
City restaurants: variety available	○	○	○	○
City restaurants: food quality	○	○	○	○

City restaurants: service	○	○	○	○
City entertainment	○	○	○	○
Shopping: variety available	○	○	○	○
Shopping: service	○	○	○	○
Excursion opportunities	○	○	○	○
Spouse programme opportunities	○	○	○	○

Comments Box

12. In the following table, for your Event 2, please rate each of the services and facilities that you used. In the Comments Box at the end of the table, please give the reasons for rating any services or facilities as 'Quite dissatisfied' or 'Very dissatisfied'. Specify the name of the businesses falling into these categories.

	Very satisfied	Quite satisfied	Quite dissatisfied	Very dissatisfied
Airline	○	○	○	○
Airport: appearance	○	○	○	○
Airport: service	○	○	○	○
Transfer	○	○	○	○
Hotel: welcome	○	○	○	○
Hotel: appearance	○	○	○	○
Hotel: service	○	○	○	○
Hotel: sleeping accommodation	○	○	○	○
Hotel: food and beverage	○	○	○	○
Venue: appearance	○	○	○	○
Venue: service	○	○	○	○
Venue: technical equipment	○	○	○	○
Venue: technical services	○	○	○	○
DMC services: pre-arrival	○	○	○	○
DMC services: post arrival	○	○	○	○
Tour guides services	○	○	○	○
Interpreter services	○	○	○	○
City restaurants: variety available	○	○	○	○
City restaurants: food quality	○	○	○	○

City restaurants: service	◯	◯	◯	◯
City entertainment	◯	◯	◯	◯
Shopping: variety available	◯	◯	◯	◯
Shopping: service	◯	◯	◯	◯
Excursion opportunities	◯	◯	◯	◯
Spouse programme opportunities	◯	◯	◯	◯

Comments Box

13. In the following table, for your Event 3, please rate each of the services and facilities that you used. In the Comments Box at the end of the table, please give the reasons for rating any services or facilities as 'Quite dissatisfied' or 'Very dissatisfied'. Specify the name of the businesses falling into these categories.

	Very satisfied	Quite satisfied	Quite dissatisfied	Very dissatisfied
Airline	◯	◯	◯	◯
Airport: appearance	◯	◯	◯	◯
Airport: service	◯	◯	◯	◯
Transfer	◯	◯	◯	◯
Hotel: welcome	◯	◯	◯	◯
Hotel: appearance	◯	◯	◯	◯
Hotel: service	◯	◯	◯	◯
Hotel: sleeping accommodation	◯	◯	◯	◯
Hotel: food and beverage	◯	◯	◯	◯
Venue: appearance	◯	◯	◯	◯
Venue: service	◯	◯	◯	◯
Venue: technical equipment	◯	◯	◯	◯
Venue: technical services	◯	◯	◯	◯
DMC services: pre-arrival	◯	◯	◯	◯
DMC services: post arrival	◯	◯	◯	◯
Tour guides services	◯	◯	◯	◯
Interpreter services	◯	◯	◯	◯
City restaurants: variety available	◯	◯	◯	◯
City restaurants: food quality	◯	◯	◯	◯

City restaurants: service				
City entertainment				
Shopping: variety available				
Shopping: service				
Excursion opportunities				
Spouse programme opportunities				

Comments Box

14. In the following table, for your Event 4, please rate each of the services and facilities that you used. In the Comments Box at the end of the table, please give the reasons for rating any services or facilities as 'Quite dissatisfied' or 'Very dissatisfied'. Specify the name of the businesses falling into these categories.

	Very satisfied	Quite satisfied	Quite dissatisfied	Very dissatisfied
Airline				
Airport: appearance				
Airport: service				
Transfer				
Hotel: welcome				
Hotel: appearance				
Hotel: service				
Hotel: sleeping accommodation				
Hotel: food and beverage				
Venue: appearance				
Venue: service				
Venue: technical equipment				
Venue: technical services				
DMC services: pre-arrival				
DMC services: post arrival				
Tour guides services				
Interpreter services				
City restaurants: variety available				
City restaurants: food quality				

City restaurants: service	◯	◯	◯	◯
City entertainment	◯	◯	◯	◯
Shopping: variety available	◯	◯	◯	◯
Shopping: service	◯	◯	◯	◯
Excursion opportunities	◯	◯	◯	◯
Spouse programme opportunities	◯	◯	◯	◯

Comments Box

15. Which trade shows do you attend on a regular basis?

- ☐ Confex
- ☐ EIBTM
- ☐ EMIF
- ☐ IMEX
- ☐ IT&ME
- ☐ Warsaw Business Travel Fair
- ☐ World Travel Market
- ☐ Other (please specify)

16. Which magazines do you read on a regular basis?

- ◯ AMI
- ◯ Conference & Exhibition Fact Finder
- ◯ Conference & Incentive Travel
- ◯ Conference News
- ◯ ITMC
- ◯ Meetings & Incentive Travel
- ◯ Other (please specify)

THANK YOU FOR YOUR VALUABLE HELP WITH OUR SURVEY

V. Sources

1. The MICE Market Monitor, Travel Marketing Factory GmbH 2006
2. 2006 VDR Business Travel Survey
3. Trends & Spends Survey 2007, Brett Howell Associates for Meetings & Incentive Travel (M&IT) magazine
4. Polish CVBs databases
5. Warsaw Meeting Industry Report 2007, Eurosystem 2007