Report

Business tourism market in Katowice in 2014.

Conference participants market research.

by Krzysztof Cieślikowski, PhD
2014 was an exceptional year for the development of the meetings industry in Poland. Many state-of-the-art, multi-functional meeting facilities were commissioned, especially in the southern part of the country. Representatives of the entities operating on the business meetings market also had many opportunities to share their experiences and get to know one another better during both regular and brand new initiatives. Furthermore, new reports on the issue of business tourism were published, and attempts were even made to evaluate the impact thereof on a city’s economy based on methodology tested on international markets.

We observed that in many big Polish cities, business events overlapped with international cultural or sports events.

This may all have contributed to the rise in the number of people visiting these cities.

Despite a certain economic slowdown in Poland (as compared to the first decade of the 21st century), statistics show that new hotels are being built and the number of people using their services is rising (in hotels, business guests are the major group). Therefore we may conclude that the market of business tourism is developing. Also, the competition is growing more and more intense, both between the entities functioning on this market as well as between the cities as destinations competing more actively for large events.

The entities operating on this market need to be supported by state administration (particularly in the case of international events) and local governments. That is why any initiatives to survey this market with the aim of improving the decisions related to managing the product, such as business tourism in a specific area, should meet with a positive response.

Katowice is a Polish city where projects supporting the development of the market of business meetings market and other events have been implemented for many years now. As of 2008, the key infrastructural investments in the city have been related to providing space for different meetings, upgrading the existing infrastructure, and building new meeting facilities. The implementation and functioning of these investments have also been supported by the changes within the administrative infrastructure (among others, the Convention Bureau was formed); new tasks were assigned to the existing administrative units of the City Hall; international institutions were involved in cooperation, and resolutions enabling the financing of planned ventures were drafted.

The Report presented hereinbelow (in its third edition) is an example of the actions undertaken by the administration of the City of Katowice in the field of monitoring the meetings industry, especially those conference-type events which are treated as significant products in the development of the business tourism market – the one whose operations and development have a positive impact on the region’s economy.

I hope you will find the report interesting, and the research results presented herein helpful.

Krzysztof Cieślikowski, PhD
## Table of contents

1 Introduction ........................................................................................................................................... 4
2 Katowice – the city of large-scale events and investments ................................................................. 5
3 Basic terms and concepts .................................................................................................................... 8
4 Conference meetings and business events in Katowice ..................................................................... 10
   4.1 The number of conference meetings in 2014 .............................................................................. 10
   4.2 General trends on the market of conference meetings and business events in Katowice in light of surveys of this market in Katowice .............................................................. 11
5 Surveys of the participants in conference meetings in Katowice in 2014 ........................................ 12
   5.1 Research methodology ................................................................................................................. 12
   5.2 Description of test sample ........................................................................................................... 13
6 Results of the surveys of market delegates & participants of conference meetings in Katowice in 2014, and an analysis thereof ......................................................................................... 17
   6.1 Delegates’ conference activity .................................................................................................... 17
   6.1.1 Katowice as the destination for delegates as compared to the rest of the country .............. 17
   6.1.2 Trends in the delegates’ activity regarding participation in conference meetings in Poland ... 18
   6.2 Preferred means of transport for the participants of conference meetings in Katowice .......... 18
   6.3 Identifying the main reasons for participation in conference meetings .................................... 20
   6.4 Perceptions of the City of Katowice as a destination for conference meetings and business events, in light of research on the delegates ........................................................................... 21
   6.4.1 Identifying the most significant features of a destination for conference participants ....... 21
   6.4.2 Determining the extent to which delegates’ expectations of Katowice as a conference location were met .................................................................................................................. 22
   6.4.3 Katowice’s strong and weak points of as a destination for participants in conference meetings and business events ..................................................................................................... 23
   6.5 Structure and size of conference participants’ expenditures in Katowice ................................ 25
7 Summary and conclusions .................................................................................................................. 28
References ............................................................................................................................................... 30
Reports and studies ................................................................................................................................. 30
Websites .................................................................................................................................................. 30
List of tables ............................................................................................................................................. 31
List of figures ........................................................................................................................................... 32
Appendices .............................................................................................................................................. 33
1 Introduction

Reviewing the latest available data related to the business tourism market in Poland (the number of hotels, tourist traffic in the hotels, meeting locations, number of meetings held and the structure thereof, the value of finalised investments and large meeting facilities), we may observe the further expansion of this market.

During multiple meetings held in 2014, representatives of entrepreneurs and state & local administration, as well as representatives of academia, discussed the issue of ordering and organizing terminology related to the market of business tourism, a.k.a. the meetings industry, expanding the research of new solutions facilitating meeting management.

The research conducted so far in Poland proves that organized conference meetings and other business events may constitute an attractive product both for the entrepreneurs involved in their implementation as well as the destinations hosting the guests that attend these meetings. This is because the participants and organizers use various services offered at the conference facility, as well as outdoors in the city. Moreover, the organization of such events and meetings requires the cooperation of many entities and may give rise to the diffusion of know-how, cooperation and the establishment of business relationships in the region. The positive economic outcomes of conferences and other businesses need to be observed and surveyed, to ensure the identification of sources and to steer the further development of the market onto a given area.

The information gathered over several years by the Katowice Convention Bureau regarding the meetings industry as well as market research on the conference delegates in Katowice allows us to identify certain trends in development, the structure of the expenditures of conference meeting participants, and to evaluate the City of Katowice in view of its on-going changes as an attractive venue for meetings as perceived by the delegates.

As in previous years, at the end of 2014 the number of business events and meetings in the city was summed up (the meetings that complied with the criteria of ICCA statistics were also indicated), and selected groups of participants in conference meetings at various facilities in Katowice were surveyed.

The major objective was to analyse their preferences, and their structure and size of expenditures in Katowice in 2014 during their stay at conference meetings.

---

1 See *Hotel market in Poland. 2014 Report*. Świat hoteli. Warsaw, July-August 2014
4 See official websites for other provincial (województwo) capital cities
5 These include: March 17th-21st, 2014 Meetings Week in Warsaw; May 7th-8th, PEMES 2014 *Polish Event Management Educators* in Warsaw; May 27th-28th, 2014 *Innovations Forum* in Rzeszów; September 26th, 2014 in Kielce, the *Innovations in the meetings industry*, etc.
8 The International Congress and Convention Association.
The research on the business tourism market in Katowice covered the following elements: an analysis of delegates’ conference activity in 2014 as compared to the previous year, including participation in meetings held in Katowice; the identification of official and unofficial reasons for attending conference meetings in Katowice; the discovery and analysis of delegates’ preferences and expectations of the City of Katowice as a meeting place; the identification of the structure and size of the conference delegates’ spending in Katowice in 2014; specifying the profile of the city’s tourist facilities and offers to cater for the delegates’ needs.

2 Katowice – the city of large-scale events and investments

2014 was an exceptional year in the development of the City of KATOWICE. A new home for the Polish National Radio Symphony Orchestra was commissioned, and the construction works for the International Congress Centre proceeded, as did the reconstruction work in the city centre. Moreover many high-profile cultural, sports and business events were held in this period. These included the ones that have become the pride of the city on the international stage. and each attracted several thousand participants:

• the European Economic Congress
• the European Congress for Small and Medium-Size Enterprises
• the International Fair of Mining, Power Industry and Metallurgy
• volleyball matches, as part of the Men’s Volleyball World Championship 2014
• the 2014 BNP Paribas Katowice Open tennis tournament
• the Tauron Nowa Muzyka Festival [New Music]
• the OFF Festival 2014
• the Rawa Blues Festival
• and many other events.

Facts resulting from the analysis of available statistical data\(^9\) show that Katowice is:
- a modern and dynamically developing city located in the centre of the largest urban agglomeration in Poland (there are nearly 2 500 000 citizens in the neighbouring cities\(^{10}\)),

\(^9\) See www.stat.gov.pl
- the largest city in the Metropolitan Association of Upper Silesia “Silesia” (formed by 14 cities),
- the administrative capital city for the Silesian Province (województwo),
- a city located in the heart of the most attractive area for investments in Poland,¹¹
- one of the Polish administrative areas with the largest share of green areas (42% of the city’s total area is designated as green areas),
- an academic city (80,000 students in Katowice, and additionally 134,000 students in the Metropolitan Association of Upper Silesia), and a significant scientific centre in Poland.¹²

... Katowice probably has the best transport infrastructure in Poland for organizing large-scale events.

- The city is located at the intersection of major European traffic routes (with the A4 motorway running about 1 km from the city centre, and the A1 motorway within 20 kms).
- There are three international airports located within 100 km of Katowice (the closest, Katowice International Airport in Pyrzowice, is 30 km from the centre of Katowice, and is the second largest in Poland in terms of passenger traffic. It is also the highest elevated passenger airport (above sea level) in Poland, where a cutting-edge guiding system for airplanes has been installed, ensuring punctual take-offs and landings.
- It is the capital city of the Silesian Province, with the highest ratio of hard surface road (for vehicle traffic) and standard gauge railways per 100 km² in Poland (for the development of railway transportation).
- It has a modern and continuously expanding hotel base (18 hotels in 2014).
- It is a city with state-of-the-art multi-functional sports facilities, suitable for the organization of large-scale events.¹⁴
- It is a city of ‘transformations’; the value of investments in the city centre from 2008 to 2015 (including the construction of the International Congress Centre) will exceed 2.6 billion zloty (around €650,000).¹⁵

The dynamics and size of the investments in Katowice have caused certain traffic obstructions for several years now, which both residents and visitors need to consider. However, in the

¹¹ See Investment-related attractiveness of Polish provinces and subregions 2013. Red.: M. Nowicki, IBnGR, Gdańsk 2013
¹² Higher education facilities well-known worldwide for the academic accomplishments of their staff as well as graduates’ achievements have their seats in Katowice. These include among others: University of Silesia, Medical University of Silesia, University of Economics in Katowice, Karol Szymanowski Academy of Music in Katowice, Academy of Fine Arts, Silesian University of Technology, Academy of Physical Education.
¹³ Other airports: Katowice at Pyrzowice, Kraków-Balice, Ostrava (Czech Republic).
¹⁴ The Spodek Sports and Entertainment Hall is still one of the largest meeting facilities in Poland, with 11,500 seats. Katowice also has many other facilities suitable for organizing large meetings, such as the state-of-the-art multi-functional facility at the Faculty of Law of the University of Silesia (each room may accommodate several hundred people), the Katowice Centre of Culture (1000 seats) and other facilities.
¹⁵ See http://przemiana.katowice.eu/przemiana_centrum
longer term, considering the changes ongoing in the global economy, and due to the functions of Katowice as the capital city of the largest urban agglomeration in Poland, these investments seem indispensable. Their implementation may improve transportation accessibility, alter the city’s image, and contribute to Katowice’s even greater tourist attractiveness on the market for business tourism and large-scale events.
3 Basic terms and concepts

As in previous reports, before we analyze the market research results, the basic concepts and terms referred to in the Report will be defined. This is necessary as such terms as ‘business tourism’, ‘the meetings industry’ and ‘business travel’ have different ranges of meaning assigned to them, and sometimes they are even considered equivalents. With respect to these notions, we can also sometimes encounter the acronym MICE (meetings - business meetings and discussions, rather individual; incentives - motivational trips; conventions - conferences and congresses; and exhibitions/events - fairs and exhibitions, events). In parallel with evolving research on the market of business tourism, in order to emphasize its economic importance in the region where it is realised (i.e. the destination), the term ‘meetings industry’ is often used.

The division proposed by Rob Davidson between the terms ‘business trip’ and ‘business tourism’ brings order to the terminology and enables us to use the concept ‘business tourism’ more precisely. It should therefore be noted that according to Davidson, ‘business trips/travels’ are a superior category and refer to all trips whose goals are related to the work or business of a traveller. They cover ‘individual business trips’ and ‘business tourism’, which is treated more like group meetings.

![Diagram of business travel and tourism]

Fig. 1. Sectors of business trips


The Poland Convention Bureau (PCB), in its regular reports on the meetings industry in Poland, also touches upon this division, and distinguishes four groups of conference meetings and

---

16 Individual business trips are distinguished by an absence of freedom regarding the choice of destination and the time thereof; they are routine, made as part of official business duties, often taken individually (presentations, consultations, research, one-on-one meetings).
business events: conference/congress, corporate events, incentive meetings and fairs/exhibitions. Therefore the term **business tourism** covers all business travel to various group meetings. This includes **group meetings** (many types of events such as conferences, training seminars, launching new products or annual general meetings); **incentive travels** (usually luxurious and attractive destinations, financed by the employer as a reward for their employees who have won work-related competitions, or for activities undertaken as part of a sales staff team); **exhibitions** (including fairs, as well as consumer events); and **corporate tourism** (luxurious entertainment options offered by the companies to their most valuable or promising clients during prestigious sports or cultural events).

The term **conference meetings and other business events** in this report (as in the PCB reports) refers to a group-type meeting (of at least 10 people), lasting at least 4 hours and held outside the employer’s office. These meetings vary from one another in duration, number of participants, spatial reach, the objective and subject of the session, and the level of formality. Therefore in practice one may distinguish among others: congresses, conventions, conferences, forums, assemblies, meetings, symposia, seminars or trainings, galas, or conclaves. In this report, the term **conference meetings and business events** covers all these types of meetings.

The term **conference meetings participant/delegate** refers both to ‘business tourists’ (a meeting participant travelling for business who meets the criteria adopted in the definition of the **tourist** based on the terminology recommended by the UN and the WTO; i.e. someone who stays outside of their place of permanent residence for at least 24 hours and uses the publicly available accommodation base), as well as other people who have relocated for business-related purposes to a **group meeting** (as described earlier) to a conference location, do not stay overnight in the visited place (one-day visitors), but use the conference services and infrastructure prepared for these meetings.

The **business tourism market** is made up of the following entities:

**Group I:** providers / suppliers of partial services
- accommodation (hotels, training facilities, conference centres),
- meeting facilities without an accommodation base (multi-functional halls, cinemas, theatres, lecture halls, etc.)
- auxiliary services (e.g. communication, catering)
- other local entrepreneurs (trading companies, specialist audio-video equipment, advertising services, etc.)

**Group II:** brokers
- specialised, acting on behalf of the employers (e.g. professional conference organizers - PCO)
- acting on behalf of the providers / suppliers of partial services (e.g. the Convention Bureau)

**Group III:** purchasers
- companies and institutions: corporations/companies, public administration and non-profit organisations (associations, foundations, unions, etc.)

---

17 However one should remember the hybrid nature of business tourism, since conferences are very often an element of incentive travel, and fairs and exhibitions are also organized in relation to a conference.
• individuals (participants in conference meetings, delegates who purchase only some auxiliary services, during and outside conference meetings; participants in closed meetings, as well as participants in open meetings).

The business tourism market is dominated by institutional demand, which is identified/reported much earlier than the individual type. However participants in conference meetings (delegates) may choose from among various auxiliary services and transport modes, as well as forms of meetings which vary in terms of venues, participation costs and duration. In making their choice, they are driven by official as well as unofficial participation motives (individual).

4 Conference meetings and business events in Katowice

For the purposes of research on the business tourism market in Katowice, the conference meetings and business events held there in 2014 were counted. The criteria set down by the Poland Convention Bureau, operated by the Polish Tourist Organization (Polska Organizacja Turystyczna), have been applied to ensure that the results obtained may be compared with those for other cities.

4.1 The number of conference meetings in 2014

In 2014 in Katowice, as in the preceding year, meetings held in 24 facilities were counted (8 in hotels; 2 in office buildings with conference rooms; 14 in public institutions, including universities, public offices, cultural facilities).

The number of conference meetings held in these facilities in Katowice in 2014 was 7,042, including 1,127 that lasted 2 days and more (see Table 1).

This shows an increase in the total number of conference meetings by 16.7% compared to 2013. At the same time, the number of meetings lasting two days and more rose by over 11.3%, and the number of one-day meetings by 17.8% compared to the previous year.

The 24 facilities that reported the number of conference meetings also included facilities where the number of meetings held there rose by over 25%. An increase was also reported in the total number of meetings held in Katowice as compared to 2013.

Table 1. Conference meetings in Katowice

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>one-day meetings</td>
<td>4998</td>
<td>5020</td>
<td>5915</td>
</tr>
<tr>
<td>meetings lasting two days and more</td>
<td>1119</td>
<td>1013</td>
<td>1127</td>
</tr>
<tr>
<td>meetings in total</td>
<td>6117</td>
<td>6033</td>
<td>7042</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s research)
The share of meetings lasting two days and more in the total number of meetings in 2014 equalled 16%.

The approximate number of participants in 2014 in the conference meetings counted amounted to 528,150 people (assuming that the average number of participants is 75 people).

4.2 General trends on the market of conference meetings and business events in Katowice in light of surveys of this market in Katowice

Research on the market for conference meetings and business events in Katowice over the last few years reveals certain trends.

These include:

• Most conference meetings are held in the spring and autumn months. In 2014 the Easter period fell in April, and the clients on the conference meetings market had already organized more events in March (see Fig. 2).

• The average number of conference meetings’ participants fell slightly in 2014 and amounted to 75 people.

• Conference meetings lasting more than two days in Katowice amount only to around ten percent (in 2014 - 16%) among all the events of this sort.

Fig. 2. Distribution of conference meetings by months in 2014.

source: K. Cieślikowski (author’s own research)
5 Surveys of the participants in conference meetings in Katowice in 2014

5.1 Research methodology

As part of our research into the business tourism market in Katowice in 2014, conference meetings and business events were counted, and particular attention was paid to the behaviours of the conference meetings’ participants (their preferences, the size and structure of their expenditures, etc.).

The main purpose of this research was to discover the conference participants’ opinions of the city of Katowice, as well as to identify their needs and expectations. Other objectives included identifying the motivations (official and unofficial) for attending conference meetings in Katowice, specifying the structure and size of delegates’ expenditures on conference meetings and business events in Katowice in 2014, and to set directions for developing the city’s offer addressed to business delegates.

For the purpose of the research, a survey-based method was applied, with a questionnaire as a research tool, accompanied by a covering letter explaining the importance of the research. Surveys were actively handed out and collected during one meeting by people prepared to conduct the research, who also provided substantive support to meeting participants with any of their questions or doubts. The direct contact with the research team ensured a high return rate and the accuracy of the information collected. In 2014 the analysis covered information collected from 267 participants from 6 conference meetings.

Specific conference meetings and venues for the research sample were selected deliberately to ensure that research could be conducted on participants of different conference meetings, which were held:

- in different locations within the borders of the City of Katowice (in the inner centre, on the international route, by the university campus, and in the southern part of the city): see Appendix 1;
- in various conference facilities (3 meetings in conference hotels, 1 meeting at a university, 2 meetings in multi-functional conference centres without accommodation option);
- on different days of the week (1 on Monday, 1 on Wednesday, 1 on Thursday, 2 on Friday/Saturday);
- their participants represented both enterprises/companies and public institutions (universities, hospitals, state and local administration units).

The research’s additional assumptions concerned the relatively short time for implementing the study (November), to ensure that diverse weather conditions and organization of other events in the city at the same time (such as cultural or sports events) would not have a significant impact on the research results (such as differences in the participants’ motivations for using catering/restaurant services, and incurring other expenses outside the conference facility).

Carrying out the research according to the assumptions and principles presented above required good organization and high involvement in direct contact, especially with respect to:
• contact with people managing the conference facilities, and convincing them how necessary it is to conduct the research on participants in conference meetings which are held also in their facilities in Katowice;
• obtaining information from the managers of the facilities regarding conference meetings held in/planned for November 2014;
• contacts with the conference meetings’ organizers in order to obtain their consent to carry out the research on the meetings’ participants;
• direct contact with conference participants while carrying out the research in the field.

For the purposes of the research, an interview questionnaire composed of 10 questions (open and closed, cafeteria-structure questions, questions using the 5-point Likert scale), as well as individual sections, were developed and tested. The survey was conducted from November 6th to 21st, 2014, with meeting participants as specified above. The questionnaire and covering letter were handed to the participants before they entered the conference rooms, along with a request to fill out the questionnaire. In the course of each conference, in several spots in front of the session rooms there were people responsible for collecting the surveys, who also provided detailed information and assistance with filling out the forms.
Afterwards the information collected was entered into and coded in a computer programme for their further analysis and to draw conclusions.

The research on the participants of conference meetings in Katowice in 2014 for the purposes of preparing the report covered the following stages:

I. Developing and testing the research tool
II. Identification of venues and meetings where the research would be carried out
III. Obtaining consent to carry out the research
IV. Handing over and collecting the surveys
V. Entering and coding the answers gathered
VI. Counting the conference meetings in Katowice in 2013
VII. Drawing conclusions and analysing them
VIII. Drafting and presentation of the report

5.2 Description of test sample

The test sample was composed of 267 participants from 6 different conference meetings held at various venues in the City of Katowice (see Appendix 1) in November 2014. Most of the participants of conference meetings (over 36%) were aged between 36-44 (see Fig. 3).
Most of the participants surveyed in Katowice came from the Silesian Province (43.4%), which proves high internal demand; the next provinces in terms of the number of participants were Mazowieckie – 11.6%, Małopolskie – 11.2%, and Dolnośląskie – 8.2% (see Fig. 4).
71% of delegates participating in conference meetings represented companies; this was the largest group among the surveyed people. Participants representing non-profit organizations (including universities, schools, foundations, associations) constituted 20%. State and local administrations represented 9% of the participants (see Fig. 5).
Moreover it should be noted that 52.6% of the overall number of people surveyed were women.

During their stay for a given conference, nearly every fifth research participant (19%) used accommodation in Katowice (see Fig. 6).

Fig. 5. Structure of the participants by the type of organization they represent
source: K. Cieślikowski (author’s own research)

Fig. 6. Structure of the participants regarding accommodation in Katowice
source: K. Cieślikowski (author’s own research)
6 Results of the surveys of market delegates & participants of conference meetings in Katowice in 2014, and an analysis thereof

6.1 Delegates’ conference activity

6.1.1 Katowice as the destination for delegates as compared to the rest of the country

The City of Katowice is an important spot for delegates on the map of conference meetings in Poland. The participants in the research (267 people) declared that in 2014 they had jointly attended 1347 conference meetings. 41% of these meetings (551) were held in Katowice (see Fig. 7.)

A more detailed analysis of the conference activity of the participants surveyed also reveals that 25.8% of all research participants in 2014 attended conference meetings in Katowice alone.

![Geographic distribution of conference meetings in 2014](image)

**Fig. 7.** Geographic distribution of all conference meetings attended by the participants in 2014

source: K. Cieślikowski (author’s own research)

The delegates surveyed attended **5.04** conference meetings on average in 2014, including **2.06** held in Katowice (tab. 2). This is more than the figure from a year ago, when the equivalent figures were 4.5 conference meetings, including 1.47 meetings on average held in Katowice.

Moreover 68.5% of delegates participating in the study had visited Katowice in 2014 to attend conference meetings just once, 19.5% from two to three times; and 12.0% four times and more.

Delegates representing companies participated in conference meetings more often than other delegates; the average number of their meetings in 2014 equalled 5.83 (including 2.42 in Katowice).

Table 2. Average number of delegates’ conference meetings in 2014 by type of organization

<table>
<thead>
<tr>
<th></th>
<th>total</th>
<th>representatives of companies</th>
<th>representatives of non-profit and administrative organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average number of meetings in total</td>
<td>5.04</td>
<td>5.83</td>
<td>3.14</td>
</tr>
<tr>
<td>Average number of meetings in Katowice</td>
<td>2.06</td>
<td>2.42</td>
<td>1.21</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)
83.8% of all conference meetings attended by the delegates surveyed in Katowice were conference meetings without an accommodation option. Poland-wide, 55.5% of these delegates’ conference meetings in 2014 had accommodation options (tab. 3). This may stem from the fact that a considerable part of the delegates (43%: see Fig. 4) come from the Silesian Province, and do not need to use accommodation during the conferences they attend in Katowice.

Table 3. Distribution of all conference meetings in 2014 by duration

<table>
<thead>
<tr>
<th></th>
<th>All conference meetings</th>
<th>Meetings with accommodation</th>
<th>Meetings without accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Katowice</td>
<td>100%</td>
<td>16.2%</td>
<td>83.8%</td>
</tr>
<tr>
<td>In other parts of Poland</td>
<td>100%</td>
<td>44.5%</td>
<td>55.5%</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)

6.1.2 Trends in the delegates’ activity regarding participation in conference meetings in Poland

72.3% of delegates participating in the research declared that the total number of conference meetings they attended in 2014 had not changed compared to the previous year. 8.6% of delegates pointed out that the number of their meetings had fallen, by 36% on average. 19.1% of research participants reported that the number of their conference meetings had increased, on average by 50% (see Tab. 4).

Table 4. Trends in the delegates’ activity on the conference meetings market in Poland

<table>
<thead>
<tr>
<th></th>
<th>drop in the number of conference meetings</th>
<th>number of conference meetings remained unchanged</th>
<th>Increase in the number of conference meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of participants who selected this answer</td>
<td>8.6%</td>
<td>72.3%</td>
<td>19.1%</td>
</tr>
<tr>
<td>Average change in the number of conference meetings</td>
<td>-36%</td>
<td>0%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)

6.2 Preferred means of transport for the participants of conference meetings in Katowice

Most of the delegates arrived at the conference meetings in Katowice by car (70.0%). The next group (16.1% of the participants) arrived in Katowice by train (see Fig. 8). These figures do not add up to 100% since the research participants were able to indicate more than one mode of transport which they used to get to the meetings.
Fig. 8. Structure of the participants with by means of transport

source: K. Cieślikowski (author’s own research)

The percentage of delegates who use a car as a means of transport to conferences is higher in the group of company representatives (77.8%) and those participants who use the option of accommodation (76.3%).

Table 5. Means of transport used by different groups of delegates/participants in conference meetings in Katowice in 2014

<table>
<thead>
<tr>
<th>Means of transport</th>
<th>Participants in total</th>
<th>Participants representing companies</th>
<th>Participants from non-profit and administrative organizations</th>
<th>Participants without accommodation</th>
<th>Participants using accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td>car</td>
<td>70.0%</td>
<td>77.8%</td>
<td>51.3%</td>
<td>76.3%</td>
<td>46.2%</td>
</tr>
<tr>
<td>train</td>
<td>16.1%</td>
<td>11.6%</td>
<td>26.9%</td>
<td>11.6%</td>
<td>34.6%</td>
</tr>
<tr>
<td>airplane</td>
<td>11.2%</td>
<td>9.0%</td>
<td>16.7%</td>
<td>9.8%</td>
<td>17.2%</td>
</tr>
<tr>
<td>long-distance bus</td>
<td>9.0%</td>
<td>6.9%</td>
<td>14.1%</td>
<td>5.6%</td>
<td>23.1%</td>
</tr>
<tr>
<td>public transportation</td>
<td>3.4%</td>
<td>3.2%</td>
<td>3.8%</td>
<td>4.2%</td>
<td>0.1%</td>
</tr>
<tr>
<td>taxi</td>
<td>2.2%</td>
<td>2.6%</td>
<td>1.3%</td>
<td>0.9%</td>
<td>7.7%</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)

Mass transit options are most often used by delegates representing non-profit organizations; 26.9% of these participants arrived in Katowice by train, 16.7% by long-distance bus. Delegates
who use accommodation to a lesser extent used public transportation in their travel to conference meetings in Katowice (tab. 5).

6.3 Identifying the main reasons for participation in conference meetings

For the purposes of determining their major motivations for participating in conference meetings, the delegates indicated the significance of a given factor on their decision to attend a conference on a 5-point Likert scale. The list of reasons was extended, and after analysing the research done by foreign institutions (as well as the pilot project), a list covering 12 factors was drawn up (4 official reasons: knowledge acquisition, establishing new business contacts, promoting own company/institutions; and 8 unofficial factors, that the participants mention less often to their employer or their accountant when planning on attending a conference).

The surveys of the delegates showed that the most motivating factor for participating in conference meetings (tab. 6) was ‘knowledge acquisition’ with an average score of 4.54 (on the 5-point Likert scale, where 1 corresponded to „unimportant”, and 5 to ‘very important’). The next one was ‘establishment of business contacts’ (3.95). The second group of significant factors includes: obtaining a certificate of participation (3.53), low costs of participation (3.50 in 2014; 3.28 in 2012, and 3.42 in 2013); distance from the place of residence (3.45 in 2014; 3.26 in 2012; and 3.27 in 2013). Delegates are paying more and more attention to these last two factors.

The possibility of doing some shopping in the city hosting a conference was the least important factor to the participants surveyed (2.14).

Table 6. Official and unofficial reasons behind participation in conference meetings

<table>
<thead>
<tr>
<th>Reason</th>
<th>Participants in total</th>
<th>Participants representing companies</th>
<th>Participants from non-profit and administrative organizations</th>
<th>Participants without accommodation</th>
<th>Participants using accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge acquisition</td>
<td>4.54</td>
<td>4.50</td>
<td>4.64</td>
<td>4.52</td>
<td>4.64</td>
</tr>
<tr>
<td>Establishing new business contacts</td>
<td>3.95</td>
<td>3.86</td>
<td>4.14</td>
<td>3.88</td>
<td>4.24</td>
</tr>
<tr>
<td>Certificate of participation / diploma</td>
<td>3.53</td>
<td>3.39</td>
<td>3.84</td>
<td>3.53</td>
<td>3.55</td>
</tr>
<tr>
<td>Relatively low costs of participation</td>
<td>3.50</td>
<td>3.46</td>
<td>3.61</td>
<td>3.52</td>
<td>3.44</td>
</tr>
<tr>
<td>Distance from place of residence</td>
<td>3.45</td>
<td>3.51</td>
<td>3.30</td>
<td>3.54</td>
<td>3.04</td>
</tr>
<tr>
<td>Promotion of one’s company/institution</td>
<td>3.22</td>
<td>3.35</td>
<td>2.93</td>
<td>3.18</td>
<td>3.40</td>
</tr>
<tr>
<td>Information on competitors’ activities</td>
<td>3.08</td>
<td>3.16</td>
<td>2.90</td>
<td>3.05</td>
<td>3.23</td>
</tr>
<tr>
<td>Personal and social aspect/public relations</td>
<td>2.99</td>
<td>2.90</td>
<td>3.18</td>
<td>2.96</td>
<td>3.09</td>
</tr>
<tr>
<td>The reputation of the conference facility</td>
<td>2.99</td>
<td>2.88</td>
<td>3.24</td>
<td>3.00</td>
<td>2.93</td>
</tr>
<tr>
<td>Possibility of using entertainment and leisure services in spare time</td>
<td>2.40</td>
<td>2.35</td>
<td>2.52</td>
<td>2.38</td>
<td>2.48</td>
</tr>
</tbody>
</table>
other attractive elements, e.g.
membership cards,
bonuses, shopping
discounts

<table>
<thead>
<tr>
<th></th>
<th>2.26</th>
<th>2.31</th>
<th>2.13</th>
<th>2.26</th>
<th>2.29</th>
</tr>
</thead>
</table>
| shopping in the
city hosting the
conference        | 2.14 | 2.17 | 2.06 | 2.09 | 2.32 |

Source: K. Cieślikowski (author’s own research)

When analysing the results presented in Table 6, we may observe that:

- delegates representing non-profit and state organizations as well as local administration attach greater significance to the category of ‘low participation costs’ than those representing companies (3.61);
- a participant who does not use accommodation pays more attention to the ‘distance from place of residence’ (3.54) than the one who stays overnight (3.04);
- delegates representing companies attach greater significance to ‘promoting one’s own company/institution’ (3.35) and ‘information on competitors’ (3.16) than the other participants.

6.4 Perceptions of the City of Katowice as a destination for conference meetings and business events, in light of research on the delegates

In order to determine the attractiveness of the City of Katowice as a destination for participants in conference meetings, two questions were added to the research questionnaire. The first asked respondents to identify the major advantages of a conference destination (certain features were listed and the participants were asked to evaluate each of them by entering ‘x’ on a 5-point Likert scale from 1 to 5, where 1 was ‘unimportant’, and 5 ‘very important’). The second question (placed in the other part of the questionnaire) asked to what degree the City of Katowice had met the delegates’ needs and expectations, determining Katowice’s attractiveness as a conference location (the same features as the ones referred to above were listed, where 1 meant ‘meets them to a small extent’, and 5 ‘meets them completely’).

The difference between the average results for specific features (expectations and fulfilment) revealed Katowice’s strong and weak points as a destination on the conference meetings market in the light of the surveys.

6.4.1 Identifying the most significant features of a destination for conference participants

The surveys of the delegates revealed that the most important feature of a conference location for the participants was transportation accessibility (‘accessibility by car transportation’ scored an average value of 3.80; then ‘accessibility with mass transit options’, 3.23), and ‘rich and diverse conference base’ (3.42) and ‘rich and diverse accommodation base’ (3.24) (see Table 7).

The participants assessed the following as less important: ‘many cultural and sports events held in a given city’ (2.46); ‘many shopping centres in the city’ (2.37).

The results presented in Table 7 show that:
a delegate who stays overnight attaches greater significance than other participants to ‘rich accommodation base’ (3.80), ‘accessibility with mass transit options’ (3.72), ‘many cultural and entertainment facilities in the city’ (3.13) and ‘parks and green areas’ (2.70);

• delegates who represent companies attach greater significance than others to: ‘accessibility by car transport’ (3.87), whereas participants from non-profit and administrative organizations pay more attention than others to ‘accessibility with mass transit options’ - 3.50.

Table 7. Features of a conference destination against the results of delegates’ surveys

<table>
<thead>
<tr>
<th>Feature</th>
<th>Participant s in total</th>
<th>Participants representing companies</th>
<th>Participants from non-profit and administrative organizations</th>
<th>Participants without accommodation</th>
<th>Participants using accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td>accessibility by car transport</td>
<td>3.80</td>
<td>3.87</td>
<td>3.65</td>
<td>3.79</td>
<td>3.85</td>
</tr>
<tr>
<td>Rich and diverse conference base</td>
<td>3.42</td>
<td>3.39</td>
<td>3.49</td>
<td>3.35</td>
<td>3.72</td>
</tr>
<tr>
<td>Rich and diverse accommodation base</td>
<td>3.24</td>
<td>3.22</td>
<td>3.31</td>
<td>3.11</td>
<td>3.80</td>
</tr>
<tr>
<td>accessibility with mass transit options</td>
<td>3.23</td>
<td>3.11</td>
<td>3.50</td>
<td>3.11</td>
<td>3.72</td>
</tr>
<tr>
<td>Rich and diverse restaurant/catering base</td>
<td>2.93</td>
<td>2.98</td>
<td>2.83</td>
<td>2.86</td>
<td>3.24</td>
</tr>
<tr>
<td>Sightseeing possibilities</td>
<td>2.91</td>
<td>2.89</td>
<td>2.96</td>
<td>2.84</td>
<td>3.22</td>
</tr>
<tr>
<td>Parks and green areas</td>
<td>2.78</td>
<td>2.81</td>
<td>2.71</td>
<td>2.75</td>
<td>2.94</td>
</tr>
<tr>
<td>Other conference meetings and business events held at the same time</td>
<td>2.66</td>
<td>2.60</td>
<td>2.79</td>
<td>2.63</td>
<td>2.78</td>
</tr>
<tr>
<td>Many cultural and entertainment facilities located in the city</td>
<td>2.65</td>
<td>2.62</td>
<td>2.73</td>
<td>2.53</td>
<td>3.13</td>
</tr>
<tr>
<td>Many cultural and sports events held in a given city</td>
<td>2.46</td>
<td>2.50</td>
<td>2.37</td>
<td>2.40</td>
<td>2.71</td>
</tr>
<tr>
<td>Many shopping centres in the city</td>
<td>2.37</td>
<td>2.36</td>
<td>2.39</td>
<td>2.28</td>
<td>2.75</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)

6.4.2 Determining the extent to which delegates’ expectations of Katowice as a conference location were met

The respondents assessed the City of Katowice as a conference destination in the following terms: ‘transport accessibility with car’ scored an average of 3.75; ‘rich and diverse conference base’ 3.60; then ‘rich and diverse accommodation base’ 3.40; ‘accessibility with mass transit options’ 3.36, as well as ‘many shopping centres’ 3.35 (see Tab. 8).

The respondents also highlighted the ‘rich and diverse restaurant/catering base’ (3.31); and ‘many cultural and entertainment events’ (3.15) (which may be related to the commissioning of the new facility of NOSPR).
Table 8. Features of Katowice as an attractive destination to delegates

<table>
<thead>
<tr>
<th></th>
<th>Participants in total</th>
<th>Participants representing companies</th>
<th>Participants from non-profit and administrative organizations</th>
<th>Participants without accommodation</th>
<th>Participants using accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td>accessibility by car transport</td>
<td>3.75</td>
<td>3.69</td>
<td>3.90</td>
<td>3.79</td>
<td>3.59</td>
</tr>
<tr>
<td>Rich and diverse conference base</td>
<td>3.60</td>
<td>3.59</td>
<td>3.64</td>
<td>3.60</td>
<td>3.60</td>
</tr>
<tr>
<td>Rich and diverse accommodation base</td>
<td>3.40</td>
<td>3.32</td>
<td>3.60</td>
<td>3.34</td>
<td>3.64</td>
</tr>
<tr>
<td>accessibility with mass transit options</td>
<td>3.36</td>
<td>3.29</td>
<td>3.52</td>
<td>3.39</td>
<td>3.21</td>
</tr>
<tr>
<td>Many shopping centres in the city</td>
<td>3.35</td>
<td>3.25</td>
<td>3.63</td>
<td>3.32</td>
<td>3.51</td>
</tr>
<tr>
<td>Rich and diverse restaurant/catering base</td>
<td>3.31</td>
<td>3.27</td>
<td>3.40</td>
<td>3.28</td>
<td>3.43</td>
</tr>
<tr>
<td>Many cultural and sports events held in a given city</td>
<td>3.20</td>
<td>3.18</td>
<td>3.25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sightseeing possibilities</td>
<td>3.16</td>
<td>3.10</td>
<td>3.31</td>
<td>3.09</td>
<td>3.45</td>
</tr>
<tr>
<td>Many cultural and entertainment facilities located in the city</td>
<td>3.15</td>
<td>3.08</td>
<td>3.30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other conference meetings and business events held at the same time</td>
<td>3.05</td>
<td>3.00</td>
<td>3.19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parks and green areas</td>
<td>3.05</td>
<td>3.07</td>
<td>3.00</td>
<td>3.00</td>
<td>3.26</td>
</tr>
</tbody>
</table>

K. Cieślikowski (author’s own research)

Moreover, when analysing the results presented in Table 8 we may observe that

- participants who do not use accommodation find Katowice more attractive with respect to car transport (3.79) than other delegates (3.59). Similarly Katowice is rated much more highly by people staying overnight than by other delegates in terms of ‘Many cultural and sports events’ (3.95) and ‘sightseeing possibilities’ (3.45);
- delegates representing non-profit and administrative organizations in nearly all the surveyed areas rated Katowice higher than the other participants.

6.4.3 Katowice’s strong and weak points of as a destination for participants in conference meetings and business events

The strong points of the city as an attractive destination for conference meetings participants are those features indicated by the delegates as highly important to them and well satisfied by the target location. The difference between the average values for fulfilment and importance yields a positive value (meaning they exceed expectations).

In the light of the surveys of conference participants in 2014, the City of Katowice meets the delegates’ requirements for nearly all the features of a conference destination which are
important to them (see Tab. 8). The one slightly weaker point, deviating a little from the delegates’ expectations in 2014, is ‘accessibility by car transport’ (score -0.05). This slightly negative result in 2014 for Katowice’s accessibility by car transport, as in the previous year, may result from ongoing infrastructural improvements being carried out in the city centre that make it difficult to move around the city by car (reconstruction of the Market Square, Korfanty Av., the construction of MCK, et al.).

Table 9. Katowice as a destination attractive to conference participants

<table>
<thead>
<tr>
<th>How important are the following features to the delegates?</th>
<th>To what extent does the City of Katowice comply with these features?</th>
<th>Katowice - Conference City - result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessibility by car transport</td>
<td>3.80</td>
<td>3.75</td>
</tr>
<tr>
<td>Rich and diverse conference base</td>
<td>3.42</td>
<td>3.60</td>
</tr>
<tr>
<td>Rich and diverse accommodation base</td>
<td>3.24</td>
<td>3.40</td>
</tr>
<tr>
<td>Accessibility with mass transit options</td>
<td>3.23</td>
<td>3.36</td>
</tr>
<tr>
<td>Rich and diverse restaurant/catering base</td>
<td>2.93</td>
<td>3.31</td>
</tr>
<tr>
<td>Sightseeing possibilities</td>
<td>2.91</td>
<td>3.16</td>
</tr>
<tr>
<td>Parks and green areas</td>
<td>2.78</td>
<td>3.05</td>
</tr>
<tr>
<td>Other conference meetings and business events held at the same time</td>
<td>2.66</td>
<td>3.05</td>
</tr>
<tr>
<td>Many cultural and entertainment facilities located in the city</td>
<td>2.65</td>
<td>3.15</td>
</tr>
<tr>
<td>Many cultural and sports events held in a given city</td>
<td>2.46</td>
<td>3.20</td>
</tr>
<tr>
<td>Many shopping centres in the city</td>
<td>2.37</td>
<td>3.35</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)

With respect to other features making a destination attractive to delegates, Katowice surpassed the delegates’ expectations. This was most evident in the following features: ‘many shopping centres’, with a score of 0.99 (on the 5-point Likert scale) and for the feature ‘many cultural and sports events in a given destination’ (-0.74).

The answers to these two questions in the questionnaire give us interesting information regarding the perception of Katowice among the delegates.

Listed below are the most frequently provided answers to the question ‘What did you like most in Katowice?’:

- 22% ‘good transportation options’
- 13% ‘grand scale of the investments’
- 1% ‘modernity of the city’
- 8% ‘shopping centres’
- 7% ‘railway station’
Another open question concerned possible areas for improvement, and read ‘What would you improve in Katowice?’. Listed below are the most frequently provided answers:

17% ‘more parking lots’
15% ‘more green areas within the city centre’
12% ‘repairs of roads and streets’
11% ‘streamlining public transportation’
9% ‘marking the way to meeting venues’

Despite some inconvenience related to marking routes to meeting location, 94% of delegates would visit the same facility again, and 91% of respondents would attend a conference meeting in Katowice again (see Tab. 10). This is a better result for the city than that achieved in the preceding year, when 87% of respondents declared a willingness to revisit this city.

Table 10. Delegates’ willingness to return to Katowice to attend another conference meeting

<table>
<thead>
<tr>
<th>Would you be willing to attend another meeting held in this facility?</th>
<th>Would you be willing to attend another meeting held in Katowice?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>94%</td>
</tr>
<tr>
<td>No</td>
<td>2%</td>
</tr>
<tr>
<td>No answer</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)

6.5 Structure and size of conference participants’ expenditures in Katowice

All the respondents (during their stay for a given meeting) spent an average of 175.59 zloty per person on goods and services.

It should be noted that

- 44.7% of the participants did not incur any expenses in Katowice, and
- 19.5% of delegates participating in the study incurred expenses on accommodation in relation to the conference.

The large number (44.7%) of delegates who did not declare any expenses in Katowice may result from the fact that they had purchased goods and services earlier or after the conference meeting in another (‘their own’) city, and only purchased fuel for the short distance from their place of work or residence (a substantial share, 43.6% of the delegates, came from the Silesian province).

19.5% of research participants declared they had incurred expenses on accommodation in Katowice in connection with the conference.

The average number of overnight stays paid for by the delegates during the conference in Katowice was 1.27; and the expenses related to this purposes reached **286.2 zloty** (considering the average number of overnight stays, one may calculate that delegates were willing to spend around 225.25 zloty per night). The average expenditure in this research group equalled **642.4 zloty** per person.
Delegates who declared they had incurred expenses in Katowice but did not use accommodation (34.5% of all the participants surveyed) spent an average of **144.9 PLN** in Katowice.

22.1% of delegates who visited Katowice did not spend anything in the city, except for the costs of transport to the conference venue. Comparing these results to 2013, we can observe increases in expenditure, both in the group of participants who used accommodation as well as in other groups (see Tab. 11).

Table 11. Average expenditures of conference meetings participants between 2012 – 2014 (in zloty)

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants without accommodation</td>
<td>133.3</td>
<td>139.6</td>
<td>144.9</td>
</tr>
<tr>
<td>Participants using accommodation</td>
<td>445.8</td>
<td>579.2</td>
<td>642.4</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)

Considering the structure of expenditures, we may observe that delegates in Katowice spent most on accommodation, and then on catering/restaurant services (both within the conference facility and outside), shopping in malls, and on local transportation (see Tab. 12).

Table 12. Structure of total expenditures which conference meetings participants incurred in Katowice

<table>
<thead>
<tr>
<th>Expenditures of participants without accommodation</th>
<th>Expenditures of participants using accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation-related services</td>
<td>0.0%</td>
</tr>
<tr>
<td>Catering/restaurant services in a conference facility</td>
<td>7.6%</td>
</tr>
<tr>
<td>Catering/restaurant services outside conference facility</td>
<td>14.5%</td>
</tr>
<tr>
<td>Conference-related materials</td>
<td>20.3%</td>
</tr>
<tr>
<td>Local transport at the destination (e.g. public transportation, taxi)</td>
<td>9.3%</td>
</tr>
<tr>
<td>Entertainment and leisure activities in spare time inside conference facility</td>
<td>8.5%</td>
</tr>
<tr>
<td>Entertainment and leisure activities in spare time in Katowice</td>
<td>8.9%</td>
</tr>
<tr>
<td>Shopping in shopping malls, centres and shopping streets</td>
<td>28.9%</td>
</tr>
<tr>
<td>Parking</td>
<td>2.0%</td>
</tr>
<tr>
<td>Total</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)
Table 13. Participants’ inclination towards expenses by type of cost, along with average volume thereof in 2014

<table>
<thead>
<tr>
<th>Type of Cost</th>
<th>Participants without accommodation</th>
<th>Participants with accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Average volume of expenditures for those who incurred them</td>
<td>Percentage of participants incurring these expenses in this group</td>
</tr>
<tr>
<td>Accommodation-related services</td>
<td>0.0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Catering/restaurant services in a conference facility</td>
<td>48.7</td>
<td>22.6%</td>
</tr>
<tr>
<td>Catering/restaurant services outside conference facility</td>
<td>54.2</td>
<td>38.7%</td>
</tr>
<tr>
<td>Conference-related materials</td>
<td>210.0</td>
<td>14.0%</td>
</tr>
<tr>
<td>Local transport at the destination (e.g. public transportation, taxi)</td>
<td>40.5</td>
<td>33.3%</td>
</tr>
<tr>
<td>Entertainment and leisure activities in spare time inside conference facility</td>
<td>191.7</td>
<td>6.5%</td>
</tr>
<tr>
<td>Entertainment and leisure activities in spare time in Katowice</td>
<td>92.3</td>
<td>14.0%</td>
</tr>
<tr>
<td>Shopping in shopping malls, centres and shopping streets</td>
<td>185.7</td>
<td>22.6%</td>
</tr>
<tr>
<td>Parking</td>
<td>22.5</td>
<td>12.9%</td>
</tr>
</tbody>
</table>

Source: K. Cieślikowski (author’s own research)

Table 13 shows an analysis only of the behaviours of those participants who incurred expenses in Katowice in relation to their participation in a conference meeting. Among the participants who did not stay overnight in Katowice, but still purchased goods or services, most people were willing to buy catering services outside the conference facility (38.7%), and spent on average 54.2 zloty on this. These services were also most often purchased by those participants who stayed overnight in Katowice for the duration of their conference meetings. 67.3% of people in this group declared they had incurred such costs, and the average value thereof was 125.1 zloty (see Tab. 13).

The second most popular type of services among the participants of conference meetings were services related to local transportation in Katowice. 33.3% of people who did not use accommodation incurred expenses corresponding to an average of 40.5 zloty, whereas 55.8% of delegates who stayed overnight spent an average of 67.1 zloty on this type of service (mainly on taxis).

‘Shopping in shopping malls, centres and shopping streets’ was the third most popular item among expenses incurred by the respondents. 40% of delegates staying overnight declared purchases of an average value of 301.4 zloty, whereas 22.6% of delegates who did not use accommodation spent an average of 185.7 zloty on shopping.
7 Summary and conclusions

In 2014 work on another large meeting facility in the city (NOSPR) was partially finalised, and work related to the reconstruction of city centre and finishing the building of International Congress Centre is being continued. In this year numerous economic, cultural and sports events were held in the city which seemed to reinvigorate the business tourism market. The spending of the participants and the number of events increased.

The total number of conference meetings held in Katowice in 2014 amounted to 7042, including 1127 that lasted 2 days and more. The approximate number of participants in these meetings again exceeded half a million people.
This shows an increase in the total number of conference meetings of 16.7%. At the same time, the number of meetings lasting two days and more rose by more than 11.3%, and the number of one-day meetings rose by 17.8% compared to the previous year.

The predominant means of transport for the participants in conference meetings in Katowice was the car (70.0% of respondents). Delegates praised the good connections between Katowice and other cities (‘good transportation options’), although they pointed out the insufficient number of parking lots and green areas in the city centre. Moreover, the damaged roads and changes in public transportation represent certain obstacles which resulted from the on-going repairs and reconstruction of the city centre.
Delegates also praised the city for the ‘grand scale of the investments’, ‘modernity’, ‘access to many shopping centres’ and its ‘railway station’.

The major reasons for participating in conference meetings include ‘knowledge acquisition’ and ‘establishment of new contacts’. Delegates also decide to visit Katowice due to the ‘relatively low participation costs’ and ‘convenient distance from their place of residence’.
In the surveys, the delegates admitted that the factor that was least important in encouraging them to participate in conferences in Katowice was ‘shopping in the conference destination’ (which scored 2.14 on the 5-point Likert scale), although the category ‘shopping in shopping centres’ constituted one of the major constituents of spending outside the conference facility (40.4% of the delegates staying overnight in Katowice spent an average of 301.4 zloty on shopping in shopping centres, and the percentage of one-day delegates who incurred any kind of expenses in Katowice, in the case of shopping, reached 22.6%, and spent an average amount of 185.7 zloty).

When analysing the average expenditures of the participants, it should be noted that those who used accommodation spent over four times more than the one-day delegates.
The spending of a delegate who used accommodation in Katowice in 2014 was 144.9 on average (which marks a slight increase as compared to 139.6 zloty in 2013). Delegates staying overnight in Katowice in 2014 spent an average of around 642.4 zloty (579.2 zloty in 2013), including 286.2 zloty on accommodation (282.8 zloty in 2013).

In the structure of overall spending generated by participants staying overnight in Katowice, we may note that accommodation-related expenses constituted 44.6%, followed by catering/restaurant services at 19.0% (both in the conference facility and outside), and shopping in shopping centres (18.9%).
The active involvement of city’s administration in attracting and organizing cultural, sporting and other events accompanying conference/business meetings, attracting international events and events lasting several days, may have contributed to the increased share of delegates who stay overnight in Katowice.

In the light of general infrastructural conditions (good transport accessibility) as well as demand-related conditions (a substantial share of the participants come from the immediate vicinity of the city and the Silesian province) the major challenge is to motivate participants in one-day meetings to use the services or do some shopping in the city. Based on this research, 40% of delegates do not incur any of their own expenses in Katowice.

The business character of the city, the ongoing changes in the urban architecture, and the new space in the centre, should contribute to increasing the participants’ inclination towards ‘staying longer’. In this respect, the city’s administration could continue to develop cooperation with key entities organizing economic events, including the managers of meeting facilities, including the hotels, so that the meetings they hold (at least for some groups of participants) would include programmes for spending free time in the city.

In the light of this research on the participants of conference meetings, it appears that the City of Katowice is already perceived as a city that meets delegates’ requirements for organizing conference and business meetings.

Despite some inconvenience related to arriving at the meetings’ destinations (due to the absence or poor marking of the routes), 94% of delegates would nevertheless visit the same facilities again, and 91% of respondents would attend a conference meeting in Katowice again.

The surveys of the participants in conference meetings in Katowice which we carried out at the end of 2014 revealed their opinions of the City of Katowice, and also enabled us to identify their needs and expectations. The respondents’ motivations for attending conference meetings in Katowice were verified, and the structure and size of their expenditures at conference meetings and business events in Katowice in 2014 were specified.

We applied the same research methodology as in the previous year (the same venues, type and time structure of held conference meetings, structure of research participants), which enabled us to compare selected results year-on-year and observe the perception of Katowice by the participants of business tourism in the light of the changes ongoing in the city and the administration’s involvement in attracting large-scale events.
References

Reports and studies

- Atrakcyjność inwestycyjna województw i podregionów Polski 2013. [Investment-related attractiveness of Polish voivodeships and subregions 2013] Ed. M. Nowicki, IBnGR, Gdańsk 2013
- Davidson R., Cope B.: Business Travel: Conferences, Incentive Travel, Exhibitions, Corporate Hospitality and Corporate Travel. POT, Warsaw 2003

Websites

- www.convention.katowice.eu
- http://przemiana.katowice.eu/przemiana_centrum
- http://turystyka.gov.pl
List of tables

Table 1. Conference meetings in Katowice................................................................. 10
Table 2. Average number of delegates’ conference meetings in 2014 by type of organization .......... 17
Table 3. Distribution of all conference meetings in 2014 by duration ........................................ 18
Table 4. Trends in the delegates’ activity on the conference meetings market in Poland ...................... 18
Table 5. Means of transport used by different groups of delegates/participants in conference meetings in Katowice in 2014 ........................................................................................................ 19
Table 6. Official and unofficial reasons behind participation in conference meetings .......................... 20
Table 7. Features of a conference destination against the results of delegates’ surveys ....................... 22
Table 8. Features of Katowice as an attractive destination to delegates ............................................ 23
Table 9. Katowice as a destination attractive to conference participants .......................................... 24
Table 10. Delegates’ willingness to return to Katowice to attend another conference meeting ............ 25
Table 11. Average expenditures of conference meetings participants between 2012 – 2014 (in zloty) ..... 26
Table 12. Structure of total expenditures which conference meetings participants incurred in Katowice .. 26
Table 13. Participants’ inclination towards expenses by type of cost, along with average volume thereof in 2014 ........................................................................................................................................ 27
## List of figures

- **Fig. 1.** Sectors of business trips ................................................................. 8
- **Fig. 2.** Distribution of conference meetings by months in 2014 ........................................ 11
- **Fig. 3.** Structure of research participants by age .................................................. 14
- **Fig. 4.** Geographic distribution of the participants in Katowice .................................. 15
- **Fig. 5.** Structure of the participants by the type of organization they represent .................. 16
- **Fig. 6.** Structure of the participants regarding accommodation in Katowice .................... 16
- **Fig. 7.** Geographic distribution of all conference meetings attended by the participants in 2014 .......... 17
- **Fig. 8.** Structure of the participants with by means of transport .................................. 19
Appendices

- Map of the facilities where research was conducted
- International Congress Centre in figures
- Important addresses and phone numbers for organizing meetings in Katowice
Appendix no. 1

Map of the facilities where research was conducted
Appendix no. 2

International Congress Centre in Katowice

<table>
<thead>
<tr>
<th>Nazwa pomieszczenia</th>
<th>Powierzchnia</th>
<th>Dopuszczalna ilość osób</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Sala wielofunkcyjna – aranzacja koncertowa</td>
<td>8040 m²</td>
<td>10 000 os.</td>
</tr>
<tr>
<td>2. Sala wielofunkcyjna – aranzacja kongresowa</td>
<td>8040 m²</td>
<td>8 000 os.</td>
</tr>
<tr>
<td>3. Sala bankietowa</td>
<td>1200 m²</td>
<td>1 000 os.</td>
</tr>
<tr>
<td>4. Foyer Sali bankietowej</td>
<td>400 m²</td>
<td>300 os.</td>
</tr>
<tr>
<td>5. Audytorium</td>
<td>600 m²</td>
<td>600 os.</td>
</tr>
<tr>
<td>6. Foyer audytorium</td>
<td>600 m²</td>
<td>600 os.</td>
</tr>
<tr>
<td>7. Restauracja główna</td>
<td>800 m²</td>
<td>450 os.</td>
</tr>
<tr>
<td>8. Lokal gastronomiczny przy wejściu</td>
<td>150 m²</td>
<td>50 os.</td>
</tr>
<tr>
<td>9. Lokal gastronomiczny „przy kładce”</td>
<td>150 m²</td>
<td>50 os.</td>
</tr>
<tr>
<td>10. Kawiarnia w foyer</td>
<td>100 m²</td>
<td>50 os.</td>
</tr>
<tr>
<td>11. Strefa VIP</td>
<td>100 m²</td>
<td>20 os.</td>
</tr>
<tr>
<td>12. Pressroom</td>
<td>100 m²</td>
<td>20 os.</td>
</tr>
<tr>
<td>13. Foyer główne</td>
<td>5500 m²</td>
<td>1 500 os.</td>
</tr>
<tr>
<td>14. Sale konferencyjne</td>
<td>1750 m²</td>
<td>1 200 os.</td>
</tr>
</tbody>
</table>
Appendix no. 3

Convention Bureau Katowice
Katowice City Hall
Rynek 13, 40-013 Katowice
convention@katowice.eu

Krzystian Gryglaszewski
tel. +48 32 259 32 15
krystian.gryglaszewski@katowice.eu

Forwarding address:
Młyńska 4,
40-098 Katowice

Janusz Nowak
Coordinator of the International Congress Centre in Katowice Project
tel. +48 32 253 93 96
mobile: +48 662 448 875
janusz.nowak@katowice.eu