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EXHIBITION INDUSTRY IN POLAND – CURRENT STATUS AND TRENDS

Summary

For many years exhibition industry has developed dynamically noting fluctuations and reacts to external influences. The aim of the paper is to examine quantitative and qualitative changes in Polish exhibition industry in the context of global changes. The analysis of the available data confirms that the industry has grown and changed within the past 10 years. The strong oligopolistic dominance of Poznań, Kielce, Cracow, Warsaw, and Lublin centres was identified. The market has been driven by the demand of visitors with strong support of the stable number of exhibitors. The relative decline of B2B exhibitions' market share and simultaneous increasing popularity of B2C and mixed events, especially those dedicated to leisure, hobby and entertainment, were also identified.

Key words: exhibition industry, meetings industry, trade fair, business tourism, trends, Poland.

JEL codes: L83

Introduction

Developed countries worldwide rely increasingly on services. One of the fastest growing groups of services is the organization of congresses, exhibitions and trade fairs, and corporate events. Each of these segments of the market has its own specific characteristics that require an individual approach to the analysis. Observation of the market in recent years shows that exhibition industry in Poland is evolving and becomes competitive. On the map of the country there emerge strong trade fair centers that create new ideas for trade fairs events and generate a variety of benefits not only for the organizers and exhibitors, but also for the local community.

The objective of descriptive study presented in the paper is to examine quantitative and qualitative changes in exhibition industry in the context of global change and to identify the direction of change of the exhibition industry in Poland. The study is based on literature review and available secondary data gathered by Poland available by Polish Chamber of Exhibition Industry and Poland Convention Bureau. The paper is structured as follows: after short introduction literature review is presented, then the method and the data sources are discussed. The result part presents the basic dynamic and spatial analysis of Polish exhibition industry's development in the latest XX years and the qualitative overview of latest trends in trade fair events' formula.

Literature review

The concept of the meetings industry in recent years has been widespread in the Polish scientific community and the business. It originated from two terms, which evaluated in the last decade, and these are MICE tourism and meetings industry. The concept of MICE tourism was, and is still sometimes, replaced by the term business tourism (cf. Davidson and Cope 2003; Medlik 1995; Sidorkiewicz 2011). It all makes that there is in the terminology a multitude of concepts that are further expanded and redefined. Some attempt to comment this phenomena was published by K. Borodako, J. Berbeka and M. Rudnicki (2015) who suggest replacing the concept of business tourism and MICE tourism by the concept business travel. The authors also treat the term of meetings industry interchangeably with the term the meetings business.

Exhibition/trade fair industry is a part of the meetings industry. Trade fairs also known as exhibition industry, is a type of activity involving the organization of the event, during which the products are sold and services (Davidson and Cope, 2003, p. 178). This definition should be extended to the issue of not only sales, but also the presentation of goods and services. The most commonly used definition of trade fair gives UFI (Union des Foires Interationales) by which the trade fair is a place for business meetings organized regularly, always in the same place, at fixed time intervals and of limited duration (UFI 1964, see in: Szromnik 2014a, p. 15). The development of trade fairs and exhibitions is very often associated with the current understanding of the trade fairs or markets, where local suppliers bring their goods for sale.

In the current meaning of trade fair it is a professional activity, that during the event can generate sales for exhibitors, promote their products, maintain or establish new business contacts, as well as allow the exchange of knowledge and ideas among the participants. Among the stakeholders of the trade fairs there are four main categories: organizers, exhibitors, visitors and guests (Szromnik 2014b, p. 28).

Additionally in this group of stakeholders it can be also included industry associations and chambers related to the theme of the fair, the media and public institutions interested in selected trade fair events. Trade shows usually last two or three days and are held in a especially dedicated to this kind of events facilities – trade centers, fairs and exhibitions venues or fairs and congresses venues. Trade shows can be divided into two main segments, ie. business fair (contracting fairs, referred to business-to-business market) and consumer fair targeted at end-users of products and services (targeting general public or B2C trade fairs – called business-to-consumer).

In Polish literature there can be identified two studies devoted to the analysis of the impact of the exhibition industry on the economy (local and national). The first one was a study conducted by the Polish Chamber of Exhibition Industry in collaboration with the Centre of Expertise for Economic Foundation of the Academy of Economics in Poznan (CEG 2009). This study was conducted in five Polish major cities from the point of view of trade fair industry. Examination of streams of expenses, taxes and investments allowed authors to specify that flow effects from expenses (exhibitors and visitors) was more than 950 million zł, while the effects of taxes were estimated at 11.5 million zł (PIT) and 17.4 million zł (CIT) (CEG 2009).

The second research project was carried out in 2014 in Krakow as part of a wider project for the assessment of the impact of the meetings industry on the economy of Krakow. In this study it was estimated that the average trade fairs exhibitor spend in Krakow more than 15 thousands zł, and its individual expenses (person representing the company) were estimated at level of 2.4 thousand zł (Borodako et al. 2014).

When considering the development of the exhibition industry we can identify three spheres of the development of the industry: macro-economic sphere, micro-economic sphere and the sphere of consumer. In addition, it should also take into account the technological sphere, which is horizontal in nature – relating to all three above spheres.

In the case of the sphere of macroeconomic it should be emphasized the transformation of trade fairs as a result of factors such as global terrorism (causing fear, for example, aganist mass events), but also factor of the dynamic development of the BRIC countries and other world countries/regions causing movement of the parts of marketing budgets of firms to participate in the trade fairs in the US market for Asian and European markets (and vice-versa) (Borodako, Berbeka, Rudnicki 2015). Among the macroeconomic factors it can also mention the problem of the geopolitical situation (both in the context of the war in Ukraine as well as in Syria and the consequences of those events).

Directions of development of the exhibition industry are also determined by microeconomic factors – mainly with the functioning of enterprises and their involvement in new technologies, in particular in the social media (Borodako, Berbeka, Rudnicki 2015). Actions taken by the companies (the organizers and exhibitors) seek to ensure that trade fair event “lives” all year round. Management of relations and fans activities on social media makes it possible to involve them in the activities of company marketing long before the trade fair, but also a number of weeks or months after the event. Also, a new change direction in selected industries is shifting a part of the marketing budgets for participating in trade fairs for Internet marketing (not directly related to the trade fair) (Friedman 2013). Such shifts may result in cancellation of participation at less important trade fairs or reducing the volume of purchased services (the surface area, the type of installation or other services). An important direction of evolution of companies' attitudes of participation in trade fairs is to strive for quantitative measurement of the profitability of the participation by calculating the so-called "return on investment" ratio (ROI) (Celuch, Janssen, Hamso 2014). Also noticeable are two phenomena related to time: the shortening of time to prepare for the trade fairs and the shortening of the duration of the fair.

In terms of changes in the trade fairs market in the sphere of consumer it should be emphasized both strive to increase the efficiency of participation (as a visitor) in the B2B fairs (through systems allowing arrangement in advance of meetings) and, above all, a very strong use of new technologies. New mobile technologies play an increasingly important role in the evaluation of offers exhibitors, arrangement of meetings, commenting on social media and other activities creating partly by the company.

Data and method

In general, the performance of the exhibition industry can be statistically described by activities of its main players: trade fair/exhibition organisers, venue operators, exhibitors, and visitors. There are two main sources of data on the exhibition industry in Poland: Polish Chamber of Exhibition Industry's (PCEI) "Exhibitions in Poland" reports and Poland Convention Bureau's (PCB) "Poland Meetings and Events Industry" reports.

PCEI (2015) has gathered statistics on the Polish exhibition market since 1994, however, the detailed reports have been published only since 2011 (http://polfair.pl/statystyki-targowe). The data are provided strictly from PCEI members. The relatively small size of the market (in terms of the number of organisers, operators, and service providers) affects the accuracy and reliability of the data provided according to international standards and definitions (CENTREX 2013). The monitoring process and overall results are audited by CENTREX – International Exhibition Statistics Union, the official auditor of UFI the Global Association of the Exhibition Industry. Moreover, the trade organisers who are not the PCEI members also follow the statistical standards (e.g. Targi Kielce, Murator Expo) and publish their data in CENTREX reports (2016).

The contracted exhibition space, the number of exhibitors and the number of visitors are the basic statistical measures of the exhibition market used by PCEI (2013-2015). The total net exhibition space rented (or contracted) by exhibitors is a basic indicator used as a sales unit on the exhibition market and a tool for measuring competitiveness of exhibition organizers and venue operators. However, in our opinion, it is too technical and hermetic an indicator as far as an economic potential of the exhibition industry is concerned. It also has a secondary value in comparison to the number of exhibitors and number of visitors, because success of trade fair shows (which differs in space) is verified more by diversity of the former and the number of the latter. According to a PCEI study, the dynamics of the Polish exhibition industry can be characterised by the trade organiser, industry, and event size, all counted by the number of exhibitors and visitors. It should be noted, however, that most of the exhibitions held in Bydgoszcz, Toruń, and Szczecin are free of charge so the visitor statistics are not obtained there. This hinders the possibility of drawing a detailed and full picture of the exhibition market's structure.

The most challenging problem in geographical analysis of the industry is that there is no detailed data delivered by the PCEI. The city profiles have been widely available since 2012. Considering the two-year cycle of organization of some of the exhibitions (Łukaszewicz 2015) – and the consequent need for their analysis in the same way – this time scope is too short to formulate reasonable conclusions. However, this traditional cycle has been gradually vanishing in the last decade and. Since this market tends to form oligopolistic competition at a macro-regional and national level as well as spatially determined natural monopolies at a local level, in which the public capital (of both local and state origin) is involved (Grzymała 2011) and which are considered key factors of cities' competitiveness and regional development (Busche 2011; Leszczyński, Zieliński, Zmyślony 2009; Szromnik 2011; 2014a; Zmyślony, Piechota 2014), it can be assumed that the performance of exhibition organisers indirectly specify the geographical structure and competitiveness of cities treated as exhibition centres.

PCB reports published since 2009 are the second data source (PCB 2009-2016). The main aim of the PCB studies is to present results defining not only the exhibition market, but also the number and size of other kinds of associations' meetings and business events held in Poland grouped in four categories: conferences/congresses, corporate events, incentive events, and trade shows (PCB 2016). The analysis is based on the standards adopted by the United Nations World Tourism Organisation (UNWTO 2006) and trade shows defined as "large-scale events of any subject, usually staged in exhibition venues" (PCB 2016, p. 9). However, the wide (objective and subjective) range of the study, the method of data gathering, and the lack of external audit mean that information on the exhibition industry is not quite reliable. As Celuch (2015, p. 79) acknowledges, the mode of data collecting is "based on voluntary provision of information by local convention bureaux, professional congress organisers and venues where the events are held". As a result, the data are hardly comparable in reference to time scope (year to year) and between cities. Such a situation makes it impossible to compile and even to compare the PCEI and PCB studies. That is why we treat the data presented by the PCB (number of trade shows by city in 2009-2015) as complementary information to PCEI research.

The data presented in the both reports were selected, calculated, and juxtaposed in order to draw the dynamic, geographical, and economic picture of the Polish exhibition industry. Basic descriptive statistics tools were used. The overall time range is 2000-2015 in the case of the PCEI study and 2009-2015 in the case of the PCB study. After presenting the general outlook of market dynamics, the study focuses on the structure of the industry according to exhibition organizers and localizations of the biggest trade shows.

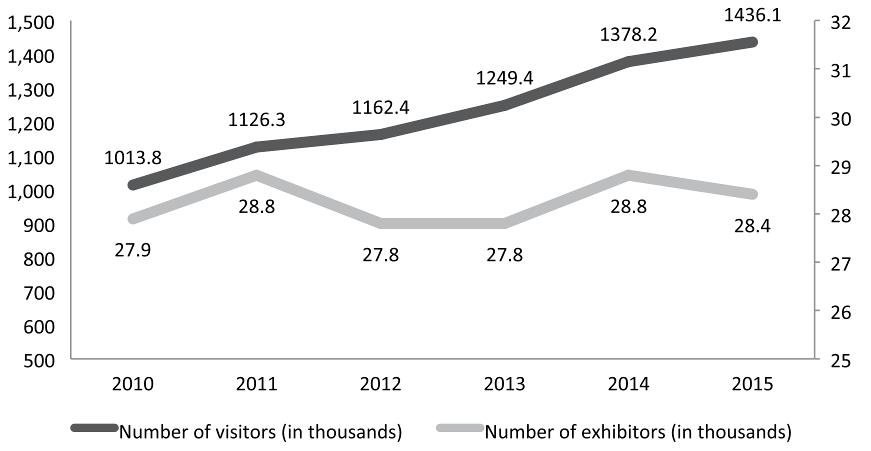
Findings and discussion

The general data presented in Figure 1 show that in the second decade of the twenty-first century the exhibition industry was steadily growing, but the structure of this growth vary. The number of exhibitors remained stable at the level of about 28.5 thousands per year. However, when we include the number of exhibitions in the analysis – which decreased from 227 to 214 (2010-2014) and from 208 to 200 (2011-2015) – we can see that the average value of the exhibitors participating in the event grew. At the beginning of the decade there were 123 firms and five years later – 142. More dynamic changes took place in the exhibition attendance sphere. The average annual growth rate was 7% and the total growth was 42%. Additionally, this increase was independent of the traditional two-year exhibition cycle as the growth rate was observed every year.

The results of the PCB study confirm the positive trends identified on the basis of PTEI study. According to them, the number of trade fairs in Poland increased from 357 events in 2009 to 802 in 2015 (however, these numbers could be inflated).

To be more specific, the main and natural characteristic of exhibition industry in Poland is the convergence of its economic and geographic structures (Table 1). Looking at the number of exhibitors, we can observe the oligopolistic tendencies which strengthened the potential of Kielce, Kraków, and Lublin at the expense of Poznań, Warszawa, and smaller exhibition centres. The market share has become more and more concentrated. In 2005, about 80% of the market consisted of six organizers and in 2010 and 2014 there were only five dominators. On the other hand, when we analyse visitor numbers, we can observe the strengthening of the MTP leadership position, whose market share increased from 34% to 47% in the analysed period. That shows the monopolistic tendencies not only in the local markets, but also on a national level. The cities which increased their market share were Lublin (growth from 2.4% to 7.3%) and Ostróda (4% in 2014). There was a market decrease in the market shares in Kielce (from 23% to 16%) and Gdańsk (from 5.2% to 3.4%). The stable shares were recorded in Krakow and Warsaw.

Figure 1. Polish exhibition market dynamics 2010–2015



Data refer to the exhibitions in Poland audited by CENTREX.

Source: PCEI (2015; 2016).

Dynamic changes, which are in line with the data mentioned above, are also taking place in relation to the trade fair shows. On the basis of the literature review, in the ranking of the most popular events in the even-numbered years 2010-2014 (Table 2), the exhibitions were grouped into three types: B2B, B2C, and mixed. The results show that the popularity of B2C and mixed trade fair was growing. In 2010, the six most popular exhibitions were in the B2B segment Their number dropped to two and their positions also fell in the subsequent years. Moreover, in 2014 four B2C/mixed events recorded more than 50 thousand of visitors: the Motor Show in Poznań, trade fairs under the Polagra brand (Poznań), the Kraków Book Fair, and the entertainment and hobby event focused around the Poznań Game Arena. The size of exhibitions measured by exhibitor numbers (the ranking is not shown in the table due to the limited length of the article) confirms this trend, however the dynamics is not so strong – in 2010 only three events out of ten were of B2C or mixed type, but in the subsequent years the number increased to five. In general, the results shown in Table 2 confirm the leading position of Poznań as the main exhibition centre in Poland.

Table 1. Top 10 of exhibition organizers in Poland by exhibitor and visitor numbers in 2005-2014

Organizer	Share (%)	Organizer	Share (%)	Organizer	Share (%)
ACCORDING TO EXHIBITOR NUMBER					
2005		2010		2014	
MTP, Poznań	42,2	MTP, Poznań	39,9	MTP, Poznań	38,2
Targi Kielce	14,6	Targi Kielce	20,2	Targi Kielce	23,8
MTG, Gdańsk	7,7	Targi w Krakowie	7,3	Targi w Krakowie	8,2
Targi w Krakowie	5,7	Murator Expo, Warszawa	6,9	Murator Expo, Warszawa	4,8
MTP, Warszawa	5,5	MTG, Gdańsk	4,7	Targi Lublin	4,7
MTŁ, Łódź	5,0	Targi Lublin	3,7	MTG, Gdańsk	4,6
Interservis, Łódź	2,9	Interservis, Łódź	3,5	Interservis, Łódź	2,6
Targi Lublin	2,5	ZIAD Bielsko-Biała	2,5	ZIAD Bielsko-Biała	2,5
MTS, Szczecin	1,7	MTS, Szczecin	2,4	Expo Arena, Ostróda	1,8
MCT, Warszawa	1,6	MTK, Katowice	2,2	MTS, Szczecin	1,7
Others	14,0	Others	6,7	Others	5,8
ACCORDING TO VISITOR NUMBER					
2005		2010		2014	
MTP, Poznań	34,3	MTP, Poznań	39,4	MTP, Poznań	46,9
Targi Kielce	22,6	Targi Kielce	19,2	Targi Kielce	16,1
MTŁ, Łódź	9,5	Murator Expo, Warszawa	11,5	Murator Expo, Warszawa	7,7
Targi w Krakowie	7,4	Targi w Krakowie	8,1	Targi w Krakowie	7,5
Interservis, Łódź	5,8	Targi Lublin	4,8	Targi Lublin	7,3
MTG, Gdańsk	5,2	Interservis, Łódź	4,5	Expo Arena, Ostróda	4,0
Targi Lublin	2,4	MTG, Gdańsk	3,5	MTG, Gdańsk	3,4
Geoservice-Christi, Wrocław	2,1	MTS, Szczecin	2,7	Interservis, Łódź	2,1
MTWiM, Olsztyn	1,2	MTK, Katowice	1,5	EXACTUS, Łódź	1,0
MTS, Szczecin	1,0	EXACTUS, Łódź	1,4	ZIAD Bielsko-Biała S.A.	1,0
Others	8,5	Others	2,4	Others	2,5

Explanations: MTP, Poznań – Międzynarodowe Targi Poznańskie sp. z o.o; Targi Kielce – Targi Kielce sp. z o.o./S.A.; MTG, Gdańsk – Międzynarodowe Targi Gdańskie S.A.; Targi w Krakowie – Targi w Krakowie sp. z o.o.; MTP, Warszawa – Międzynarodowe Targi Polska sp. z o.o.; MTŁ, Łódź – Międzynarodowe Targi Łódzkie sp. z o.o.; INTERSERVIS, Łódź – INTERSERVIS sp. z o.o. Łódź; Targi Lublin – Międzynarodowe Targi Lubelskie S.A. oraz Targi Lublin S.A.; MTS, Szczecin – Międzynarodowe Targi Szczecińskie sp. z o.o.; MTK Katowice – Międzynarodowe Targi Katowickie sp. z o.o.; MCT, Warszawa – Międzynarodowe Centrum Targowe sp. z o.o. Warszawa; Murator Expo, Warszawa – MURATOR EXPO sp. z o.o.; MTWiM, Olsztyn – Międzynarodowe Targi Warmii i Mazur s.c.

Source: PCEI (2005–2015).

Table 2. Top 10 of exhibitions by exhibitor and visitor numbers in 2010-2014

Rank	Trade show	Type	City	Number of visitors
2010				
1.	LAS-EXPO	B2B	Kielce	41 447
2.	AGROTECH	B2B	Kielce	41 447
3.	BUDMA	B2B	Poznań	41 313
4.	GLASS	B2B	Poznań	41 313
5.	CBS	B2B	Poznań	41 313
6.	BUMASZ	B2B	Poznań	41 313
7.	EDUCATIONAL FAIR	B2C	Poznań	37 025
8.	FISHING FAIR	B2C	Warszawa	34 417
9.	WIND AND WATER	B2C	Warszawa	34 417
10.	GASTRO – TRENDS	mixed	Poznań	33 491
2012				
1.	MOTOR SHOW	B2C	Poznań	46 843
2.	BUDMA/CBS/GLASS/BUMASZ	B2B	Poznań	41 102
3.	WARSAW BOOK FAIR	B2C	Warszawa	39 967
4.	POLAGRA-FOOD/POLAGRA-GASTRO/ POLAGRA-TECH/TAROPAK	mixed	Poznań	38 796
5.	BOOK FAIR	B2C	Kraków	33 521
6.	WIND AND WATER	B2C	Warszawa	32 563
7.	POZNAŃ GAME ARENA/HAPPY BABY/Hobby/ Aquazoo	B2C	Poznań	32 229
8.	POLAGRA-PREMIERY	B2B	Poznań	27 548
9.	EDUCATIONAL FAIR /BOOK FOR KIDS	B2C	Poznań	27 411
10.	GARDENIA/RYBOMANIA	B2C	Poznań	22 452
2014				
1.	MOTOR SHOW	B2C	Poznań	67 064
2.	POLAGRA-FOOD/POLAGRA-GASTRO/ POLAGRA-TECH/TAROPAK	mixed	Poznań	58 564
3.	BOOK FAIR	B2C	Kraków	52 321
4.	POZNAŃ GAME ARENA/HAPPY BABY/HOBBT/ AQUAZOO	B2C	Poznań	50 962
5.	GREEN AGRO SHOW- POLISH CEREALS	mixed	Sielinko	35 080
6.	BUDMA/CBS/GLASS	B2B	Poznań	34 549
7.	POLAGRA-PREMIERES	B2B	Poznań	29 837
8.	EDUCATIONAL FAIR	B2C	Poznań	28 725
9.	GARDENIA	B2C	Poznań	22 237
10.	ROLTECHNIKA	mixed	Wilkowice	21 649

Source: as in Table 1.

In addition to the knowledge resulting directly from the presented numbers, we can observe the following qualitative changes in the Polish exhibition industry:

- the rise of new multifunctional venues (Ostróda, Lublin, Kraków, Warszawa) and the modernization of the already existing ones (Poznań) as well as the modernization of transport and exhibition-related infrastructure (Łukaszewicz 2015);
- implementation of modern and user-friendly technological solutions, including mobile telecommunication solutions (Łukaszewicz 2015);
- diversification and expanding of exhibition organizers and venue operators' offers by providing professional organization of conventions and events (Leszczyński, Zielinski, Zmyślony 2009; Łukaszewicz, 2015; Szromnik 2014a);
- the growing expectations of trade fair visitors who do not perceive exhibitions only from the perspective of the product core as their participating in trade fairs is not only associated with visiting exhibition stands but also with seeing the city in which a trade fair is taking place (Leszczynski, Zielinski, Zmyślony 2015);
- the growing number of exhibition organisers, venue operators, service providers, but also exhibitors or visitors who treat exhibitions as a knowledge transfer platform leading to open innovations (Borodako, Berbeka, Rudnicki 2015; Leszczyński, Zieliński 2015).

Conclusions

The analysis of basic data on the Polish exhibition industry in Poland proves that the market is dramatically changing both quantitatively and qualitatively. The following cognitive conclusions can be drawn here.

1. In the analysed period the Polish exhibition market is driven by the demand of visitors with strong support of the stable number of exhibitors. A two--year exhibition cycle has become less important in the overall industry performance. In general, the market is strong and could be recognized as the best organized part of the growing meetings market in Poland.
2. With regard to the number of exhibitors market is moving into national oligopoly with increasing competitive positions of Poznań, Kielce, Cracow, Warsaw, and Lublin, which together control 80% of the market. It can be observed that the Poznań Fair keeps on strengthening its leadership position in terms of visitor numbers and the trend is expected to continue in the near future.
3. The market has moved towards an open formula. It is reflected by the relative market share decline of B2B exhibitions and the increasing popularity

of consumer and mixed events, especially those dedicated to leisure, hobby and entertainment. The specialization of exhibition centres can be observed. Poznań, Warszawa, and Kraków have developed into consumer trade fair centres, while Kielce and Lublin have focused more on contracting (B2B) events. Another manifestation of openness is the trend of lowering ticket prices or abandonment of entry fees for visitors, as well as the opening of the exhibition infrastructure towards non-business events.

4. We should expect stronger convergence of the exhibition industry and the other sector of meetings industry in the near future.

In the light of the data sources' accessibility and reliability issues outlined in the paper it is necessary to include the statistics on the exhibition industry (and the meetings industry) in the public statistics framework.

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Przemysł targowy w Polsce – stan obecny i trendy

Streszczenie

Przemysł targowy rozwijał się dynamicznie od wielu lat, przechodząc zmiany i reagując na zewnętrzne wpływy. Celem pracy jest ilościowe i jakościowe zbadanie przemian w polskim przemyśle targowym w kontekście procesów globalnych. Analiza dostępnych danych potwierdza, że w ostatnich 10 latach przemysł rozrósł się i przekształcił od wewnątrz. Zauważono silną, oligopolistyczną dominację ośrodków w Poznaniu, Kielcach, Krakowie, Warszawie i Lublinie. Rynek napędza popyt gości przy mocnym wsparciu stałej liczby wystawców. Zwrócono również uwagę na względny zanik udziałów rynkowych wystawców B2B, przy jednocześnie rosnącej popularności B2C i wydarzeń mieszanych, szczególnie tych poświęconych wypoczynkowi, hobby i rozrywce.

Słowa kluczowe: przemysł targowy, przemysł spotkań, targi, turystyka biznesowa, trendy, Polska.

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