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Demand Outlook

Poland & CEE 2017

Introduction

We are proud to provide you with our Demand Outlook report for the 2017 season. This year, for the first time, we have been able to present in our report very detailed data collected last year in Poland, compared with the corresponding results for the 2016 season. With such data as a background, we have also presented information showing the situation in the European cities selected by us, as we also monitor the meetings market in 12 countries. In addition to Poland, these countries are as follows: the Czech Republic, Slovakia, Bulgaria, Romania, Italy, Austria, Hungary, Lithuania, Estonia, Ukraine and Russia.

We can say that year by year we are reaching more data in Poland and in the entire Central and Eastern European region than anyone has before. However, as "the appetite comes with eating", we are already looking forward to the next years' reports, in which the data will be even more extensive and complete. It will be possible because since the founding of Z—Factor, we have been constantly optimizing and expanding our flagship product – Demand Outlook. Today it collects the most extensive knowledge on the market of conferences and meetings. Demand Outlook forms the richest knowledge base, known to use, in our region about industries, customers, numbers and types of meetings, and provides detailed analysis and reports on them.

If you would like to convert the data collected by us into your long-term business relationship – please contact us.

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2017 vs. 2016: Poland

2.7% more meetings / 1.1% higher occupancy in Poland

51,407
events in Poland in 2017

According to Demand Outlook – a system monitoring the meetings market in Europe – 51,407 events took place in Poland in 2017. This means an increase by 2.7% compared to the number of events in 2016.

The increase in the number of meetings in Poland is most visible in such cities as Kraków, Wrocław and the Silesian Agglomeration. In the whole country, in 2017 each day an average of 141 meetings took place. They were most often organized in October – 5,591 and May – 5,414, while the fewest meetings were held in August – 2,642 and in July – 2,896. The largest increase in the number of meetings compared to 2016 can be seen in January – by 20.9%, in May – by 20.2%, in March – by 15.3% and in July – by 10.2%. The biggest drop can be seen in April – by 15.4% and in June – by 8.5%. This situation is partly due to: the organisation in 2016 of the NATO summit in Warsaw and the World Youth Days in Krakow, and a further increase in the number of meetings in 2017 in such cities as Wrocław and Krakow.
The average occupancy of all available space increased by 1.1% and in 2017 amounted to 11.9%. Compared to 2016, the increase was most noticeable in July – by 2.6% and in May – by 2.4%. However, compared to the previous year, the occupancy rate dropped the most in April – by 4.8% and in February – by 2.8%.

As for market share, both in 2017 and in 2016 independent facilities held the top position – however in 2017 they lost 4% compared to the previous year, reaching a share of 48%. At the same time, most hotel chains have retained their positions. The leading ones are as follows: Accor – an increase by 1% to the level of 14% market share, Hilton Worldwide – unchanged 8% market share, Carlson Rezidor – unchanged 5% market share, IHG – unchanged 4% market share, Best Western , Marriott International and Starwood – unchanged, each with a 3% market share. IGH and Starwood – no change, each with 3% share of the market.

Usage of space per hotel chain 2016 vs. 2017

	2016	2017	Difference
Hotels/Independent facilities	54,4	51,5	2,9
Accor	12,5	12,1	-0,4
Hilton Worldwide	8,2	6,8	-1,4
Carlson Rezidor	4,1	4,1	-0,4
IHG	3,6	3,6	0,0
Best Western	3,3	3,0	-0,3
Starwood	3,0	2,7	-0,3
Marriott International	2,8	2,4	-0,4
Louvre Hotels Group	2,8	2,0	-0,6

	2016	2017	Difference
Vienna	2,2	2,0	-0,2
Diament	2,1	1,9	-0,2
FOCUS	0,9	1,2	0,3
Qubus	0,8	1,2	0,4
IBB	0,3	0,7	0,4
Grupa Arche	0,2	0,2	0,0
Puro Hotels	0,1	0,2	0,1
Leonardo Hotels	0,0	0,1	0,1

As for type of facilities, it can be seen that the hotel occupancy rates in 2017 and 2016 were similar – 11.9% in 2016 and 12.3% in 2017. Exhibition and congress centres strengthened their position by 4.3% – to the level of 11.8%, while facilities and rooms for special events lost 0.5% and reached 5.6% of the occupancy rate.
In the whole country, the pharmaceutical / medical industry was the most active industry in 2017. It organized 7,522 meetings, i.e. 0.9% less than in 2016. The second place in the ranking is held by the education industry, which organized 5,599 meetings – 0.8% more than in the previous year, and the third place belongs to technologies / IT – 4194 meetings, i.e. 1.1% more than in 2016.

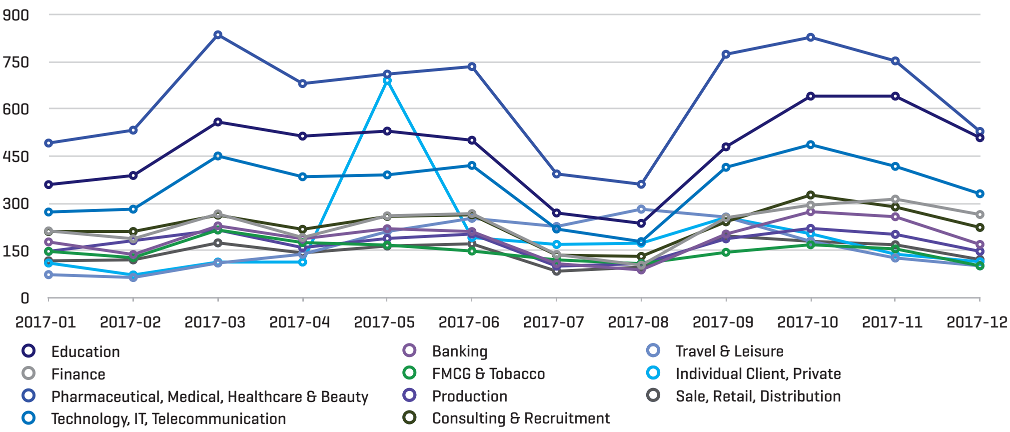
In the monthly analysis, almost each of the strong industries in Poland shows a particular increase in their activities in April, then reducing the number of events in May – due to long weekends, and raising it again in the pre and post-holiday period. A very large increase in the number of meetings also took place in the months from September to November, but the largest growth in activity

The highest occupancy **17,3%** was observed in rooms sized **50-99 m²**

can be seen in October. In turn, from the end of November to the beginning of March, the number of events is falling – especially in January and February. The industries which are not subject to these "typical" behaviours include: tourism – the most active during the holiday season, and individual customers – organizing significantly fewer meetings in the period between November and April.

In graphical form, the seasonality and activity of industries during the year is as follows:

Industries seasonality in 2017



It can be seen that, on a national scale, the largest number of customers organize meetings for the pharmaceutical / medical industry – in 2016 – 1,663 companies, while in 2017 – 1,637; for the telecommunications / IT industry – in 2016 – 1,209 companies, and in 2017 – 1,285, and for the education industry – in 2016 – 1,253 companies and in 2017 – 1,209 companies.

Leading industry - number of customers 2016 vs. 2017

	2016 number of customers		2017 number of customers
Pharmaceutical, Medical, Healthcare & Beauty	1663	Pharmaceutical, Medical, Healthcare & Beauty	1637
Education	1253	Technology, IT, Telecommunication & Online Service...	1285
Technology, IT, Telecommunication & Online Service...	1209	Education	1209
Consulting & Recruitment	826	Consulting & Recruitment	856
Marketing, Media, Publishing & Event Agencies	704	Production	830
Production	632	Marketing, Media, Publishing & Event Agencies	733
Finance	555	Travel & Leisure	571
Sale, Retail, Distribution	494	Finance	562
Construction, Real Estate & Renovation	442	Sale, Retail, Distribution	562
Travel & Leisure	433	Construction, Real Estate & Renovation	440
Governmental, Political, Military	380	Governmental, Political, Military	408
Entertainment	348	Entertainment	375
Transportation & Shippment	347	Industrials & Utilities	351
Industrials & Utilities	333	Transportation & Shippment	344
Automotive	241	Automotive	254

Considering the size of the conference rooms, it can be seen that in the Demand Outlook analysis, the largest share is held respectively by: small rooms 21-49 m² – 35%, rooms in size 50-99 m² – 30% and average rooms 100-199 m² – 20%.
In Poland, conference rooms of the size from 50 m²to 99 m² recorded the largest occupancy in 2017 – 17.3%, similarly to 2016 when it was 17.6%. Also, high occupancy were recorded by conference rooms with space from 21 m² to 49 m² – 14.4% in 2017 and 14.9% in 2016, and rooms with space from 100 m² up to 199 m² – 13.2% in 2017, and 15.2% in 2016.

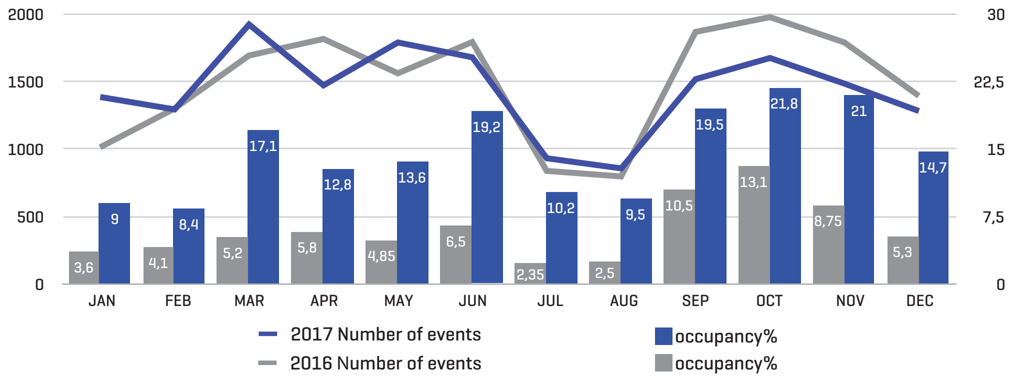
WARSAW

4.6% number of events decrease / 2.1% higher occupancy

In 2017 in Warsaw, 16,846 meetings were organized, which is 4.6% less than in 2016. In 2017, each day an average of 46.2 events took place.

In 2016, the biggest number of meetings took place in October – 1,977, September – 1,868 and in April – 1,816, and the fewest meetings were held in August – 797. However, in 2017, the meetings were most often organized in March – 1,909 and in May – 1,776, while the fewest of them were in August – 843 and in July – 918.

Warsaw – number of events and occupancy 2016 vs. 2017



Despite a decrease in the number of meetings, an average occupancy of the entire available space increased from 11.9% in 2016 to 14% in 2017. The increase in average occupancy rate for Warsaw is possible due to increase in effects of share of medium meetings taking place in facilities with a conference space from 100 m² to 199 m² – in 2017 (675 meetings) and in the facilities with space from 200 m² to 349 m² (473 such meetings).

44%

of events were held in independent properties

In 2017, the increase in occupancy refers to each day of the week – with Tuesdays having the biggest increase – 4.5% compared to 2016. In monthly terms, in the previous year the highest occupancy was in October – 21.1% and in November – 21%, and the lowest in February – 8.4% and in January – 9%.

In 2017, independent properties had the largest market share – 44%, however, they recorded a decrease by 2% as compared to 2016. Among the hotel chains, the Accor chain dominated and over the two years has retained its position with 16% market share. The Hilton Worldwide, which gained 3% and recorded 14% share last year, was ranked third, followed by Marriott International – unchanged with 8% share and Carlson Rezidor, which gained 1% and showed a market achieved of 7% in 2017.

In terms of the space used, hotels gained 1% and showed an average of 17% occupancy in 2017. At the same time, conference and exhibition centres gained 5.5%, showing 12.3% occupancy, and facilities and rooms for a special event recorded a 5.6% occupancy, which means that compared to 2016 they lost 0.5%.

Compared to 2016, we can observe a decrease in the number of meetings held in Warsaw by each of the strongest industries in this city, including the pharmaceutical / beauty industry, which organized 2,474 meetings and thus showed a decrease of 5%. Another branch – the education industry carried out 2,054 meetings and recorded a decrease of 8.9%, and the IT industry with 1,335 meetings showed a decrease of 18.1%.

As for the clients, the most active company in 2017 organized 110 meetings in Warsaw, gaining a 0.7% market share.

KRAKÓW

15.7% more meetings / 2.4% higher occupancy

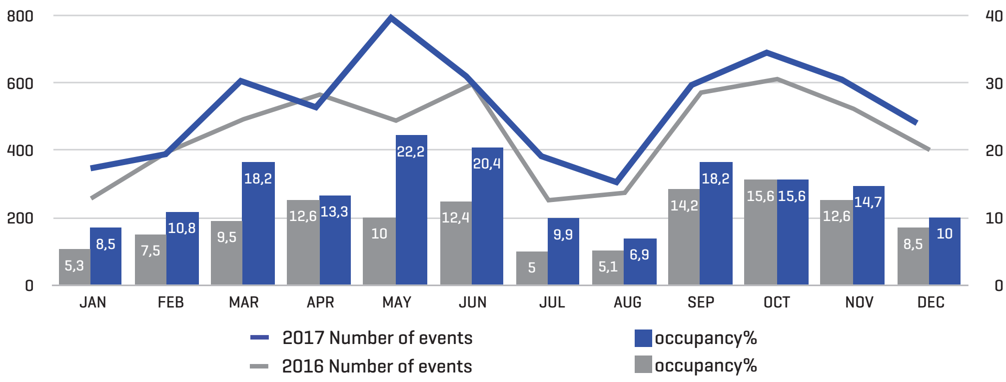
In Kraków, independent properties achieved the highest markets hare of **31%**

In 2017 in Kraków, 6,203 meetings took place, which is 15.7% less than in 2016. In average, 17 meetings were organized in this city each day in 2017.

In 2016, the biggest number of meetings were organized in Krakow in October – 611, in June – 596 and in September – 571, and the lowest in July – 251, in January – 257 and in August – 271. In 2017, the meetings were most often organized in May – 787 and in October – 684, while the fewest of them were in August – 300 and in January – 341.

The average occupancy of all available space increased by 2.4% in the analysed years – from 11.8% to 14.2%. The highest occupancy was in the previous year in May – 22.2% and in June – 20.4%, and the lowest in August – 6.9% and in January 8.5%.

Kraków – number of events and occupancy 2016 vs. 2017



The annual increase in occupancy refers to each day of the week – with the biggest increase on Thursdays and Sundays – the same increase of 3.2% in comparison to 2016.

In 2017, the largest share in the market was held by independent properties – 31%, however they recorded a decrease of 7% as compared to 2016. Hilton Worldwide turned out to be the most active hotel chain, which in comparison to 2016 gained 7% and reached 18% market share. Best Western network, which lost 1% and recorded 9% market share this year, was ranked third, followed by Accor, Carlson Rezidor, IHG and Qubus with identical market share of 8% each.

As far as the type of the facility is concerned, in terms of the space used, exhibition and congress centres lost 1% and showed an average of 16.8% occupancy in 2017. At the same time, hotels gained 2.9%, showing an occupancy of 13.9%.

Compared to 2016, we can observe an increase in the number of meetings held in Kraków by almost all of the industries which are active in this city. The strongest of them – the pharmaceutical / beauty industry organized 773 meetings – 1.4% more than last year, education industry – 741 meetings, i.e. 28% more than last year, and the tourist industry 471 – i.e. 3.7% more.

The most active client in Kraków in 2017 organized 64 meetings in this city and gained 1% market share.

SILESIAN AGGLOMERATION

4.5% more meetings / 0.8% lower occupancy

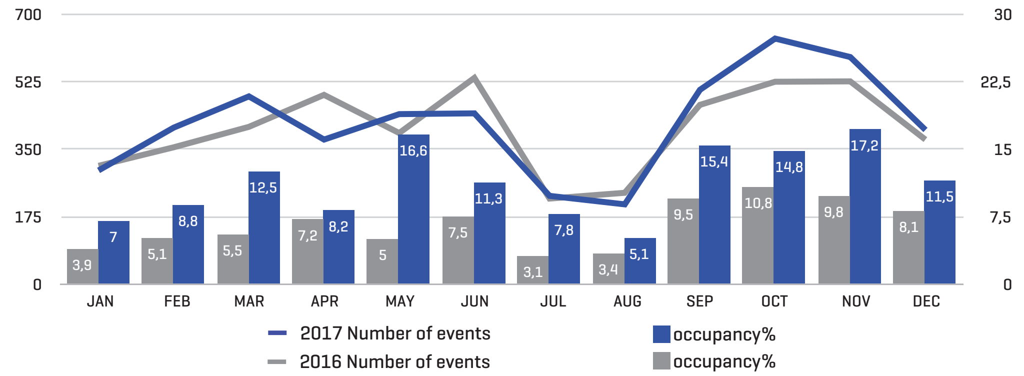
In the Silesian Agglomeration, 4,991 meetings took place in 2017, which is 4.5% more than in 2016. This means that last year, an average of 13.7 meetings took place each day in that area.

4,991

meetings in Silesian Agglomeration in 2017

In 2016, the biggest number of meetings was in June – 535, in November – 526 and in October – 525, and the lowest in July – 222. In 2017, however, the events were most often organized in October – 629 and November – 591, while the fewest of them were held in August – 209 and in July – 231.

Silesia – number of events and occupancy 2016 vs. 2017



The average occupancy rate of the entire available space slightly decreased compared to 2016 by 0.8% – from 12.2% to 11.4%. Last year it was the highest in November – 17.2% and in May – 16.6%, and the lowest in August – 5.1% and in January – 7%.

Analysing days of the week, the biggest decline can be seen on Wednesdays – by 3.2% and on Tuesdays – by 2.8%.

In the Silesian Agglomeration in 2017, the largest share on the market was held by independent facilities, which retained their market share at unchanged level – 38%. The strongest chain – Diament lost 3% of market share, showing it at 18% in 2017. The another strongest chain – Best Western retained a 13% share – the same as last year, while Vienna gained 3%, reaching a 13% share.

The strongest industry in the Silesian Agglomeration – the pharmaceutical / beauty industry organized 877 meetings, which means an increase of 3.7%, the education industry realized 576 meetings, showing an increase of 10.3%, while the IT industry with 408 meetings in 2017 showed an increase of 13.6% compared to the previous year.
The most active company in 2017 carried out 70 meetings in that region, which means 1.4% share on the market.

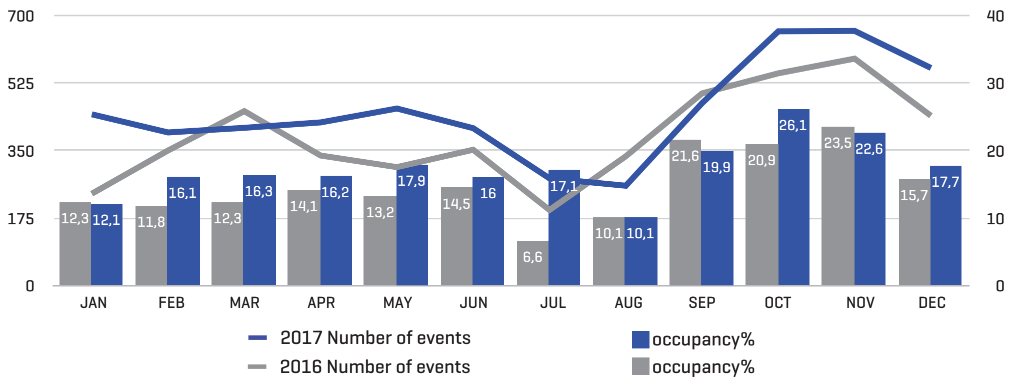
WROCŁAW

17.2% more meetings / 2.2% higher occupancy

Wrocław in 2017 hosted 5,344 meetings, that is 17.2% more than in 2016. In the previous year, each day an average of 14.6 meetings took place in this city.

In 2016, the highest number of meetings was in Wrocław in November – 588 and in October 550, while the lowest in July – 196 and in January – 238. In 2017, the meetings were most often organized in October – 660 and in September – 659, the fewest meetings were held in August – 259 and in July – 278.

Wrocław – number of events and occupancy 2016 vs. 2017



In the analysed period of time, the average occupancy of the entire available space increased from 15.1% in 2016 to 17.3% in 2017. Last year, the highest average occupancy was recorded in October – 26.1% and in November – 22.6%, while the lowest was in August – 10.1% and in January – 12.1%.

October was top demand month in Wroclaw in 2017 with **26,1%** occupancy of conference rooms

On an annual scale, the increase in occupancy concerns almost every day of the week – with the highest increase on Fridays – of 4.1%. However, a drop of 1.4% was recorded for Mondays.

In 2017, the largest share in the market was held by independent properties – 34%, which retained market share at the same level over the two of the analyzed years. Among the hotel chains, the Accor chain dominated with an increase of 2% in the market share – from 31% in 2016 to 33% in 2017. The Diament chain lost 1% and was ranked third with the share of 11%, while Best Western recorded a share of 6% in 2017 – a drop by 3% and Louvre Group – a drop by 1%.
In Wrocław, an increase can be seen in the activity of each of the leading industries. The pharmaceutical / beauty industry organized 735 meetings in 2017, which means an increase of 2.2%. The IT sector carried out 617 meetings – an increase of 14.9%, while the education industry with 576 meetings showed an increase of 14.7% versus to 2016.

The most active company in Wrocław in 2017 carried out 123 meetings and 2.3% market share.

TRI-CITY

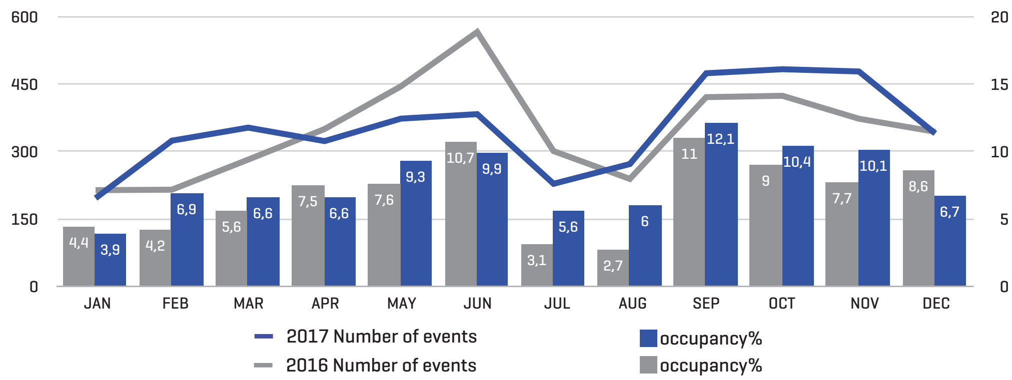
1.9% more meetings / 0.6% higher occupancy

In the Tri-City, 4,197 meetings took place in 2017, which is 1.9% more compared to 2016. In the previous year, an average of 11.5 meetings took place each day.

In 2016, the biggest number of events was June – 566 and in May – 445, and the fewest in January – 214 and in February – 215. In 2017, the meetings were most often organized in October – 485 and in November – 480, the fewest meetings were held in January – 195 and in July – 230.

The average occupancy of the entire available space slightly increased – from 7.3% in 2016 to 7.9% in 2017. The average occupancy of the entire available area was the highest in 2017 in September – 12.1%, and the lowest in January – 3.9%.

Tri-City – number of events and occupancy 2016 vs. 2017



On an annual basis, the increase in occupancy rate concerns each day of the week – apart from Fridays, which remained unchanged, with Wednesday gaining the biggest increase – an increase of 1.9% compared to 2016.

4,197
events in Tri-City in 2017

In the Tri-City, in 2017 independent facilities had the largest market – 43%, however, they recorded a drop by 9% versus 2016. Among the hotel chains, the Accor chain dominated, strengthening position by 6% – to 21% in 2017. The Focus chain lost 1% and it was ranked third with a market share of 10%, while another chain – Best Western gained 2% and recorded 8% share.

The pharmaceutical industry turned out to be the strongest industry in the Tri-City, with 705 meetings organised in 2017, which is 7.5% more than in the previous year. The next place was held by the education industry, which organised 424 meetings, i.e. 12.6% less than in 2016.
The most active company in 2017 organized 67 meetings in the Tri-City, gaining 1,6% market share.

POZNAŃ

2.8% more meetings / 2% higher occupancy

In 2017, 3,506 meetings took place in Poznań, which is 2.8% more than in 2016. In the previous year, an average of 8 meetings took place in this city each day.

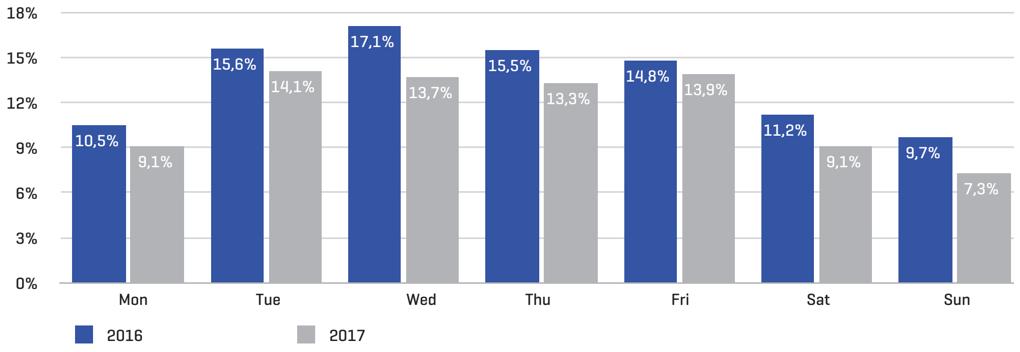
Independent properties achieved
39%
of market share in Poznań

In 2016, the biggest number of meetings in Poznań was in November – 423 and in October – 388, while the lowest in July and August – 160. In 2017, the meetings were most often organized in March – 391 and in May – 370, while the fewest of them were held in August – 148 and in July – 159.

The average occupancy of all available space increased by 2% in the analyzed years – from 11.5% to 13.5%. In 2017, it was the highest in May – 17.6%, while the lowest was in July – 6% and in August – 6.1%.
The annual increase in occupancy in Poznań refers to each day of the week – with the biggest increase on Wednesdays – by 3.4% versus 2016.

In 2017, the largest share on the market was held by independent properties – 39%, which retained market share at the same level over the two of the analyzed years. The Accor chain turned out to be the most active hotel chain, which in comparison to 2016 lost 1% and reached 37% market share. The IBB chain, which lost 2% and recorded 16% share this year, was ranked third, followed by Starwood which gained 2% and showed 5% market share.

Poznań – occupancy days of the week 2016 vs. 20117



In the analyzed years, we can observe an almost constant number of meetings carried out in Poznań by the industries which are the strongest in this city. The strongest of them – the pharmaceutical / beauty industry – held 532 meetings in 2017 – it's only 3 meetings fewer than in 2016, another industry – IT, with 253 meetings, also almost repeated the result from 2016 – reducing it only by 5 events.
The most active company in Poznań in 2017 carried out 109 meetings, which means that it reached 3.1% share on the market.

LUBLIN

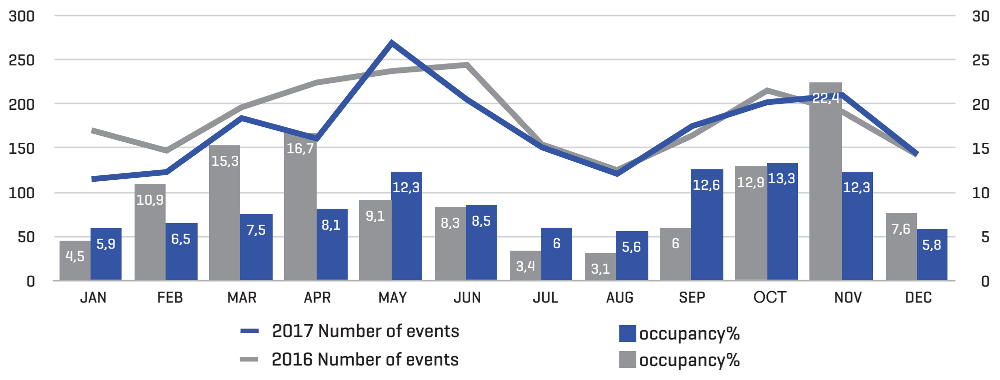
8.9% fewer meetings / 0.6% lower occupancy

Lublin hosted 2,010 meetings in 2017, which is 8.9% less than in 2016. In average, 5.5 meetings were organized in this city each day in 2017.

In 2017 average
5.5
meetings took place in Lublin daily

In 2016, the biggest number of meetings was in June – 244 and in May – 237, while the lowest in August – 125. In 2017, meetings were most often organized in May – 265, while the fewest of them took place in January – 111.

Lublin – number of events and occupancy 2016 vs. 2017



The average occupancy of all available space in Lublin dropped by 0.6% in the analyzed years – from 9.3% to 8.7%. In 2017, it was the highest in October – 13.3%, while the lowest was in August – 5.6%. The decrease in occupancy in Lublin concerns mainly Sunday – 5.5% compared to the previous year, while the highest increase was on Mondays and Wednesdays – identically by 2.2%.

In 2017, independent properties had the largest share on the market – 87%, however, they recorded a decrease of 5% compared to 2016. The Accor chain turned out to be the most active hotel chain, which in comparison to 2016 lost 3% and reached 10% market share. Another most active hotel chain – IBB gained 2% and reported a market share of 3%.

In 2017, majority of meetings in Lublin were carried out by private clients – 521, who organized 43.5% more meetings than in the previous year. The most active industry – the education industry – carried out 410 meetings and reported an increase of 27.3%, while the pharmaceutical / beauty industry showed a drop by 37.2% and carried out 182 meetings.
In Lublin, the most active company in 2017 performed 52 meetings, having 2.6% market share.

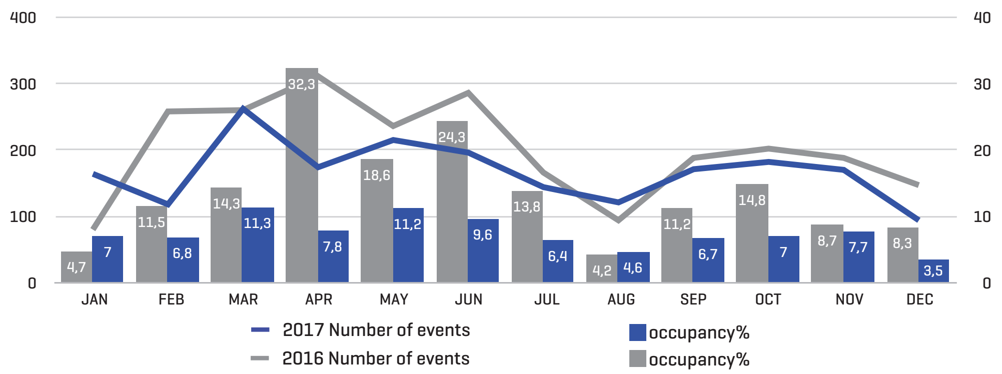
ŁÓDŹ

19.8% more meetings / 4.6% lower occupancy

In 2017 in Łódź 1,908 meetings took place, which is 19.8% more than in 2016. In the previous year, an average of 5.2 meetings took place in this city each day.
In 2016, majority of meetings were held in April – 311, and the fewest meetings were organised in January – 80. In 2017, the meetings were most often organized in March – 257 and in May – 210, while the fewest of them were held in December – 89.

The biggest **YOY 2017 v 2016** growth was observed in Łódź

Łódź – number of events and occupancy 2016 vs. 2017



The average occupancy of all available space dropped by 4.6% in the analyzed years – from 11.9% to 7.4%. In 2017, it was the highest in March – 11.3% and in May – 11.2%. The lowest occupancy was recorded in December – 3.5% and in August – 4.6%.

The decrease in occupancy in Łódź concerns each day of the week – compared to 2016, Tuesdays dropped the most by 6.8%, and Mondays – 5.1%.
In 2017, independent facilities had the largest share on the market – 31%, however, they recorded a decrease of 18% versus 2016. The Vienna chain turned out to be the most active hotel chain, which in comparison to 2016 gained 4% and reached 22% market share. The Accor network, which gained 2% and recorded 12% market share and was ranked third. The fourth most active hotel chain – Hilton Worldwide gained 5% and achieved a market share of 11%, and Arche Group gained 2% and was ranked fifth with a share of 8%.

Compared to 2016, we can observe a decrease in the number of meetings held in Łódź by almost all of the industries active in this city, including the pharmaceutical / beauty industry, which performed 293 meetings, i.e. 25.1% less than in 2016, the education industry – 176 meetings, i.e. 27.9% less, and IT – 167 meetings, which means a slight decrease of 1.2%.
The most active company in 2017 in Łódź performed 44 meetings, holding 2.3% market share.

2017: Central and Eastern Europe

Meetings industry in selected cities

BUDAPEST

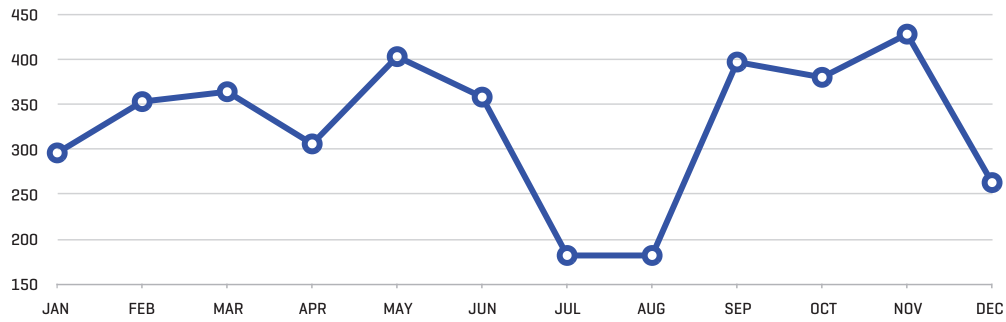
Occupancy of meeting rooms – 12.5%

In 2017 an average of 176 meetings was held yearly per property monitored by Demand Outlook. The average occupancy of the total available space in the Hungarian capital was 9.4%, and the occupancy of conference rooms – 12.5%.

Budapest: The biggest number of meetings in November and May. July and August were slowest months in 2017

Conference rooms with the space from 21 m² to 199 m² recorded the largest occupancy in 2017. The occupancy of particular sizes of rooms was as follows – rooms 21 m²-49 m² – 35%, rooms 50 m²-99 m² – 35.6%, but rooms 100 m²-199 m² – 13.2%.
They were most often organized in November – 428 and in May – 403, while the fewest of them took part in July and August – accordingly 182.

Budapest – number of events per month 2017



The largest available conference space was used in Budapest by facilities of the Danubius Hotels Group – 29.6%, followed by Marriott International – 21.6% and Corinthia Hotel – 10.4%.
In the Hungarian capital, the most active industries are as follows– pharmaceutical / medical / beauty – 449 meetings, technologies / IT – 410 meetings and education / trainings – 247 meetings.

PRAGUE

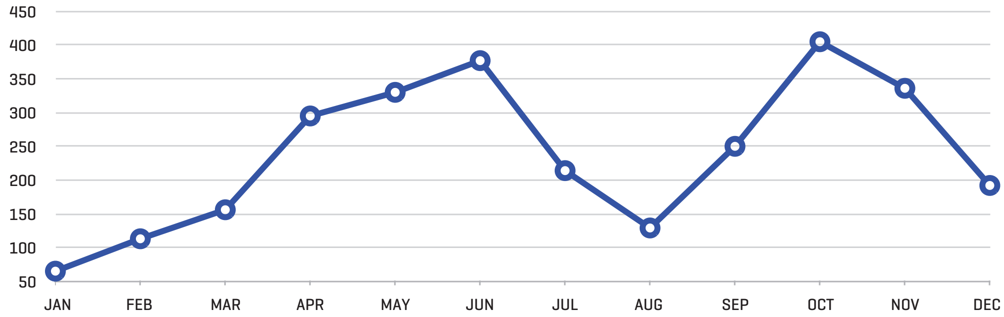
Occupancy of meeting rooms – 12%

In Prague, in average 166 events took place per one property monitored by Demand Outlook in 2017. The average occupancy of the total available space was 9.2%, and the occupancy of conference rooms 12%.

Conference rooms with the space from 21 m² to 99 m² reported the largest occupancy in 2017. The occupancy of particular sizes of rooms was as follows – rooms 21 m²-49 m² – 32.5%, rooms 50 m²-99 m² – 44.3%. In addition, rooms of 100 m²-199 m² reached 9.7% of the occupancy.

The meetings were most often organized in October – 405 and in June– 377, while the lowest number of meetings took part in January – 65 and in February– 113.

Prague – number of events per month 2017



Prague: **Vienna House, Hilton Worldwide** and **CPI** leading the market

The most of the available conference space in Prague was used by the facilities of the Vienna chain – 16%, Hilton Worldwide – 14.8% and CPI Hotels – 12.8%.
In the capital of the Czech Republic, the most active industries are as follows – pharmaceutical / medical / beauty – 454 meetings, technologies / IT – 350 meetings and education / trainings – 194 meetings.

BUCHAREST

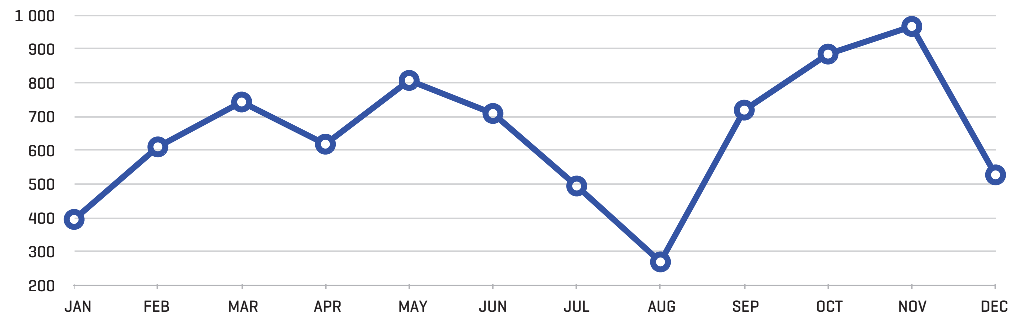
Occupancy of meeting rooms – 28.6%

In Bucharest, of 590 events average took place per one property monitored by Demand Outlook in 2017. The average occupancy of the total available space in the Romanian capital was 19.3%, and the occupancy of conference rooms – 28.6%.

Bucharest: **19.3%** average occupancy of all space available on the market

Conference rooms with the space from 21 m² to 199 m² had the highest occupancy in 2017. Share of particular sizes of rooms was as follows – rooms 21 m²-49 m² – 29%, rooms 50 m²-99 m² – 37.8%, rooms 100 m²-199 m² – reaching 21% occupancy.
The meetings were most often organized in November – 967 and in October – 885, while the lowest number of meetings took part in August – 269 and in January – 395.

Bucharest – number of events per month 2017



The most available conference space in Bucharest was used by the Ramada Worldwide – 19.7%, IHG – 13.9%, Carlson Rezidor – 12.8% and Marriott International – 12%.
The most active industries are as follows: pharmaceutical / medical / beauty industry – 1001 meetings, technologies / IT – 742 meetings, consulting / recruitment – 490 meetings and the financial industry – 455 meetings.

SOFIA

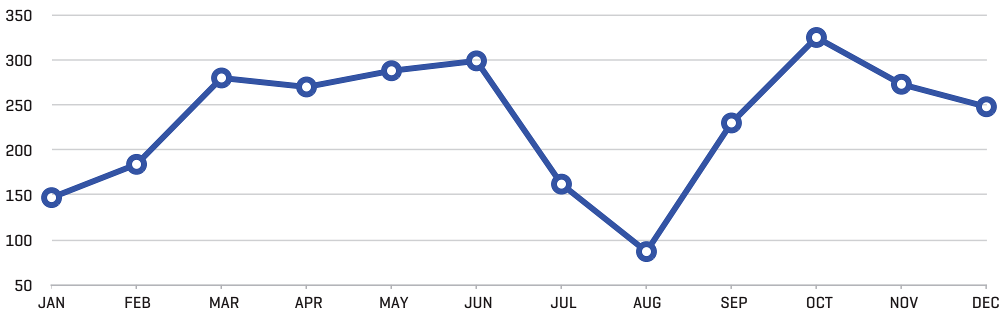
Occupancy of meeting rooms – 17.7%

Sofia: average
227
meetings per hotel
in 2017

An average 277 events took place per property in Sofia monitored by Demand Outlook in 2017. The average occupancy of the total available space in the capital of Bulgaria was 13.3%, and the occupancy of conference rooms – 17.7%.

Conference rooms with the space from 21 m² to 349 m² had the largest occupancy in 2017. Share of particular sizes of rooms was as follows – rooms 21 m² -49 m² – 28.4%, rooms 50 m² -99 m² – 30.9%, rooms 100 m² -199 m², reaching 20,9% occupancy, and rooms 200 m² -349 m² – 15.1%. The meetings were most often organized in October – 325 and in June – 299, while the lowest number of meetings took part in August – 87 and in January – 147.

Sofia – number of events per month 2017



The largest available conference space was used in Sofia by independent property – 28.7%, with Sofia Hotels Management being the strongest hotel chain – 25.6%, followed by Starwood – 12.9%, Hilton Worldwide – 11.1% and Accor – 8.2%.
The most active branches are as follows: consulting / recruitment – 27 meetings, pharmaceutical / medical / beauty – 21 meetings, technologies / IT – 20 meetings, finances – 14 meetings.

METHODOLOGY AND RESEARCH SAMPLE

For the purpose of the Demand Outlook system in Poland and in 11 European countries, we collect information on meetings held in conference, catering and banquet areas, on a daily basis and in a methodological manner. After the precise verification of such data, it is presented online even the same day. It should be noted that the number of monitored cities and facilities in Europe is regularly increasing, and over the analyzed years the total area of facilities analyzed by Demand Outlook in Poland has also changed.

In the analyzed cities in Poland in 2016, the system collected information obout meetings held on 82.5 thousand m², where the conference area shere is 78%, and the catering area 22%. In 2017, the system reached meetings held at 86.8 thousand m² – where 73% shere was of conference area and 27% was the catering area.
In the cities outside of Poland which were presented in this analysis – i.e. Prague, Budapest, Bucharest and Sofia – in the reported year 2017 the Demand Outlook system analyzed the meetings held on the total space of 81.9 thousand m².

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