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Smart Hospitality

Demand Outlook

Poland & CEE 2018

Introduction

We are extremely proud to provide you with our Demand Outlook report for the 2018. We are happy that because of system development it is larger and more comprehensive than the previous year reports. This year, again, we have been able to present in our report very detailed data collected last year in Poland, compared with the corresponding results for the 2017 season. Since the Demand Outlook system has been operated in 16 other countries, too, for the first time we have presented in this report data comparing 2018 and 2017 for the European cities selected by us.

We are highly certain that we reach more data in Poland and in the entire Central and Eastern European region than anyone has done before. Besides Poland, we have been monitoring the markets of meetings in 16 countries, and only last year did we start operations in Greece, Serbia, Russia and Belarus. Thus, Demand Outlook collects the most extensive knowledge on the market of conferences and meetings. It is the richest knowledge base known to us, in our region about industries, customers, numbers and types of meetings, and provides detailed analysis and reports on them.

Countries in which Demand Outlook operates: Austria, Azerbaijan, Belarus, the Czech Republic, Denmark, Estonia, Greece, Hungary, Italy, Lithuania, Poland, Romania, Russia, Serbia, Slovakia, and Ukraine

We do hope that such summary of information that we are presenting today from entire Demand Outlook will be useful for you and serve as inspiration for other business activities.

Wojciech, Edyta & Z—Factor team

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Smart Hospitality

Contact:
Z-Factor Sp. z o.o. s.k.
Batorego 20 lok 6, 31-155 Kraków, Poland

info@zfactor.pl
zfactor.pl

2018 vs. 2017: Poland

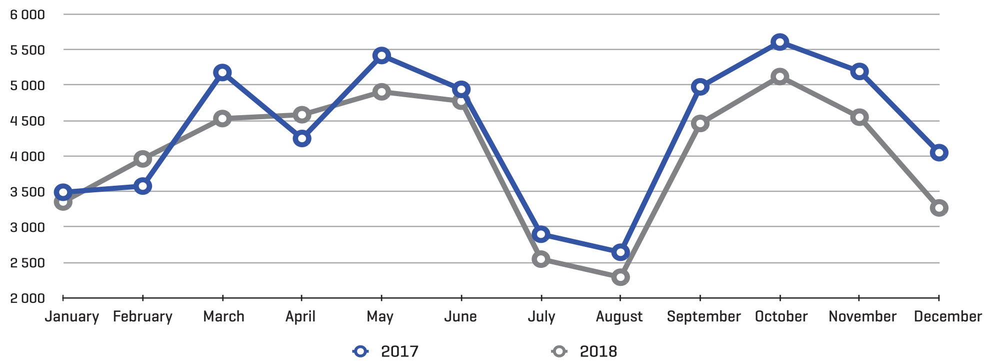
POLAND – 6.9% fewer meetings

According to Demand Outlook – a system monitoring the meetings market in Europe – 6.9% fewer events took place in Poland in 2018 than in 2017. A decrease in the number of meetings observed in Poland is most visible in such cities as Warsaw, Kraków, Poznań, and Łódź. On the other hand, the Silesian Agglomeration, the Tri-City, and Wrocław recorded increases.

The occupancy of conference rooms, or their percentage use against their total number available on the market stood at 12.5% in 2018. This marks a decline of 2.4% on the previous year figure. In terms of the number of events held on individual weekdays in 2018, the largest number of them was held on Wednesdays marking a 6.6% drop against 2017, on Thursdays, showing a decline of 9.9% against 2017, and on Tuesdays with a decrease of 8.4%.
In 2017, the largest number of meetings was held in October and May, like in 2018. Both years also showed the lowest number of events recorded in August.

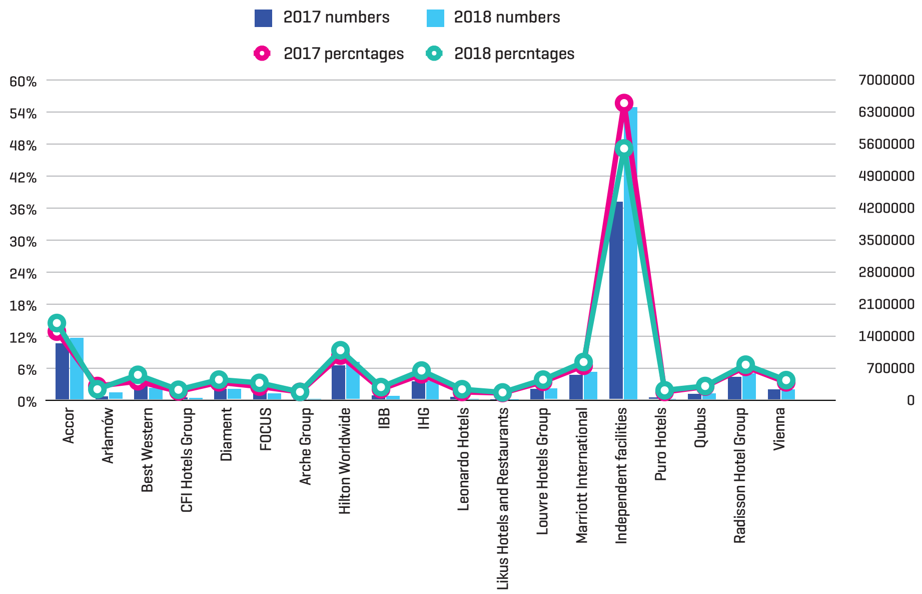
In 2018, the largest market share in Poland was accounted for by independent facilities which, however, recorded **a decline of 18.6%** compared to 2017.

Poland– number of events per month 2017 vs. 2018



In 2018, the largest market share in Poland was accounted for by independent facilities which, however, recorded a 8.5% decline compared to 2017. The most active hotel chains in Poland were: Accor – up by 1.6% compared to the previous year, Hilton Worldwide – up by 1%, Marriott International – up by 0.6%, and Radisson Hotel Group – up by 0.4%.

Poland – occupancy by hotel chain 2017 vs. 2018

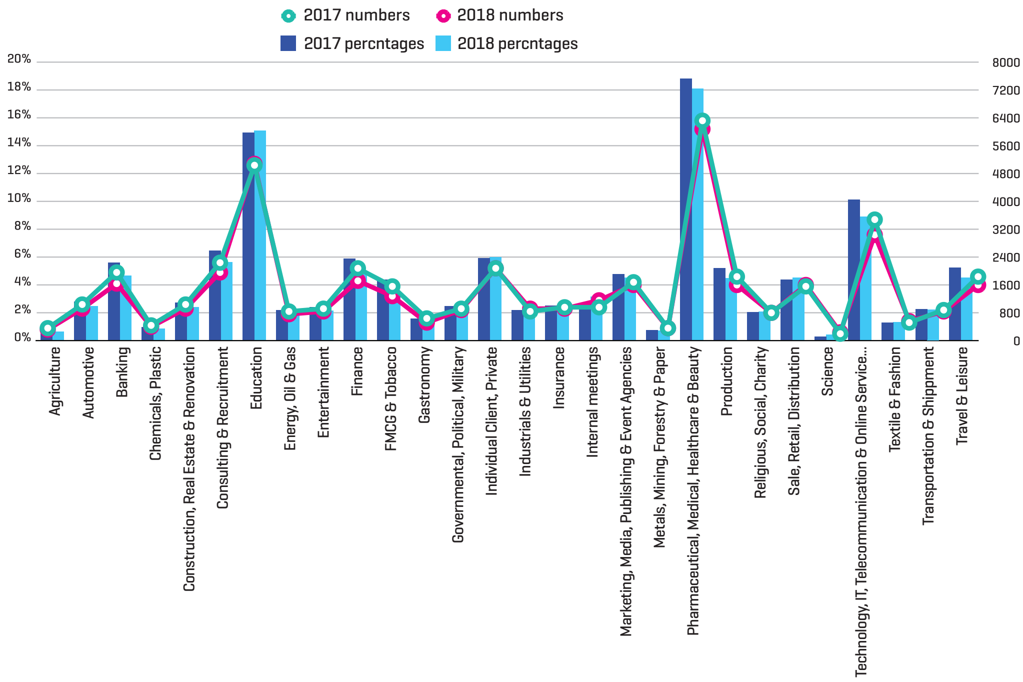


In 2018, a decline in the number of events was recorded in the most active industries in Poland: pharmaceutical down by 3.7% compared to 2017, technologies down by 12%, consulting and recruitment down by 13%, and finance down by 18%.

The most active company in Poland organised 405 meetings in 2017, gaining a market share of 0.8%, followed by the one that organised 350 meeting, thus gaining a share of 0.7%. In 2018, the most active companies organised 239 and 231 meetings, respectively, thus gaining a 0.5% market share each.

It can be seen that, on a national scale, the largest number of customers organise meetings for the pharmaceutical / medical industry, with 1,584 companies organising 7,516 events in 2017, while in 2018 1,658 customers organised 7,238 events for that industry.

Poland – percentage share of industries in 2017 vs. 2018



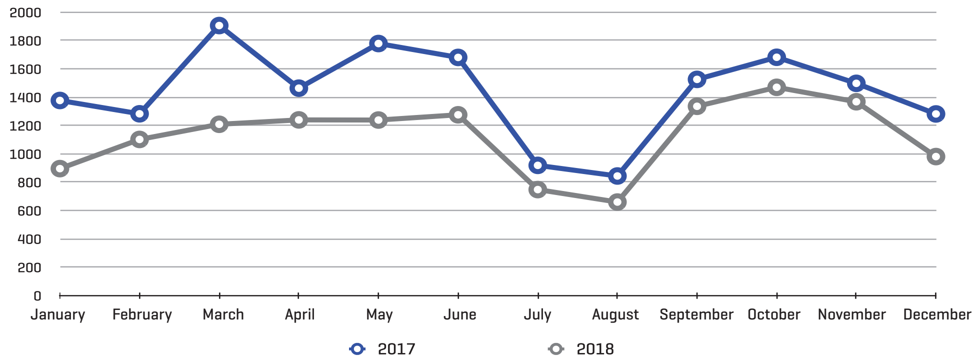
WARSAW

8.1% fewer events

In 2018, the Warsaw occupancy rate of conference rooms, or their percentage use against their total number available on the market stood at 14.2%, which marked a 4.4% decline.
In 2018, there were also 8.1% fewer events organised in Warsaw than in 2017. In terms of the number of events on individual weekdays in 2018, the largest number of them was held on Wednesdays marking a 5.4% decline against 2017, on Tuesdays, showing a 5.3% decline against 2017, and on Tuesdays marking a 12% decrease. In 2017, the largest number of meetings was held in March and May in Warsaw, while in 2018 the largest number of them were held in October, November, and September.

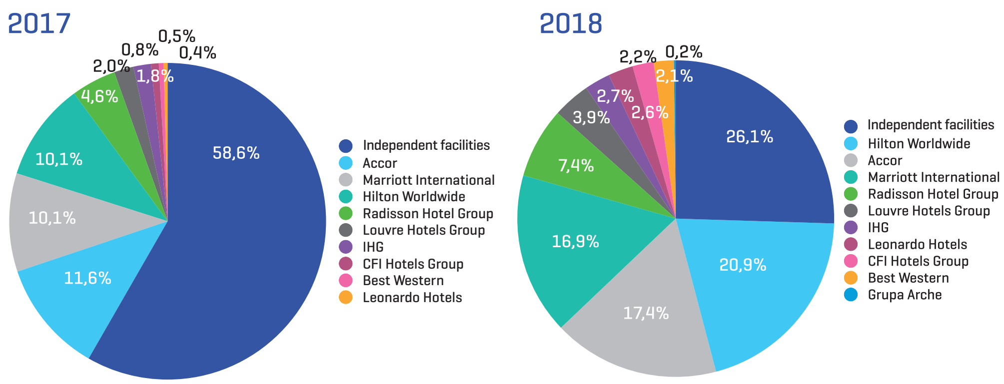
In 2018, independent facilities in Warsaw had the largest market share **26.9%**

Warsaw – number of events per month 2017 vs. 2018



In 2018, independent facilities had the largest market share in Warsaw at 26.9%, which, compared to 2017, marked a decline of 30.9%. All hotel chains present on that market recorded an increase, including Hilton Worldwide up by 8.6% to 20.5%, Accor up by 6.9% to 17.3%, and Marriott International up by 6.4% to 16.7%.
Declines in the number of events were recorded by most active industries in Warsaw: pharmaceutical down by 6%, education down by 6%, and technologies down by 10.6%. The most active organisation in Poland organised 121 meetings in 2017, gaining a market share of 0.7%, followed by the one that organised 108 meeting, thus gaining a share of 0.6%. In 2018, the most active companies organised 89 meetings each, which accounted for their market share of 0.7%.

Warsaw – occupancy by hotel chain



KRAKÓW

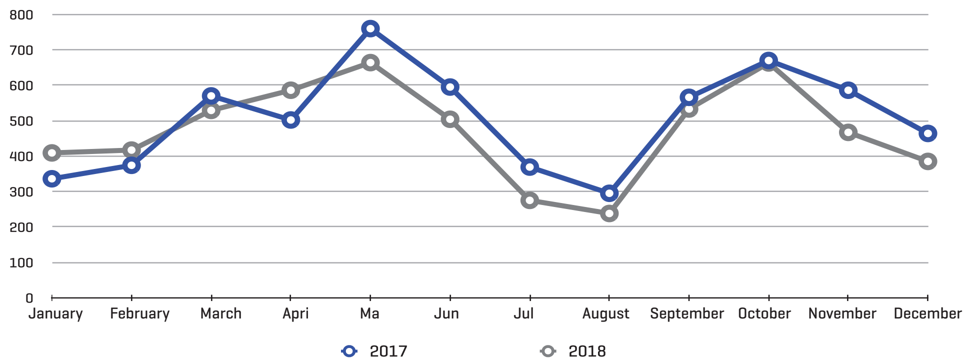
7.1% fewer meetings

In 2018, independent facilities had the largest market share in Kraków

29.8%

The percentage use of conference rooms in Kraków against their total number available on that market, or the occupancy of conference rooms stood at 14.2% in 2018. In comparison to the 2017 figure, it marked a decline of 3.5%. In 2018, there were 7.1% fewer meetings held in Kraków than in the previous year. In 2018. the largest number of events was held on Wednesdays – down by 6.3%, on Thursdays – down by 19.5%, and also on Tuesdays – down by 11.3%. Like in 2017, the largest number of meetings held in Kraków took place in May and October 2018.

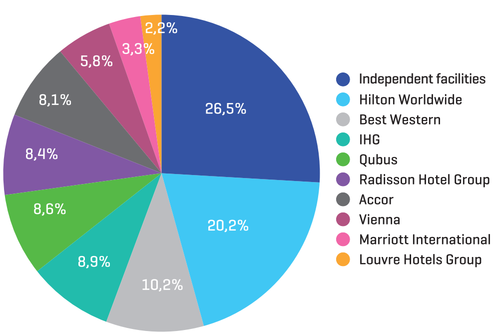
Kraków – number of events per month 2017 vs. 2018



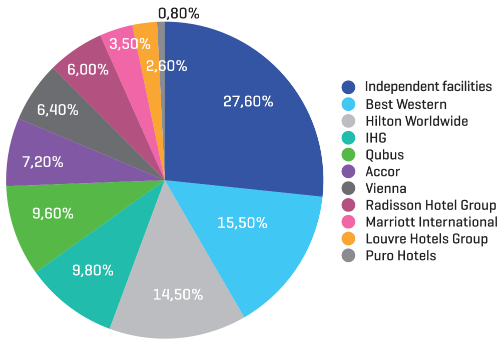
In 2018, the largest market share was accounted for by independent facilities – 29.8% –which, however, recorded a 2.8% decline compared to the previous year figure. The most active hotel chains are Best Western –14.3% in 2018 and a decline of 1.4%, Hilton Worldwide –13.4% and an increase of 4%, and also Qubus – 9% and an increase of 0.8%. In terms of the number of events the majority of the most active industries recorded declines in Kraków. Pharmaceutical industry down by 0.8%, education down by 4.8%, and the tourist industry down by 2.5%.

Kraków – occupancy by hotel chain

2017



2018



The most active customer organised 68 meetings in 2017, gaining a market share of 1.1%, while the next one organised 52 meeting, thus gaining a share of 0.9%. In 2018, the most active company organised 45 meetings, which accounts for a market share of 0.8%.

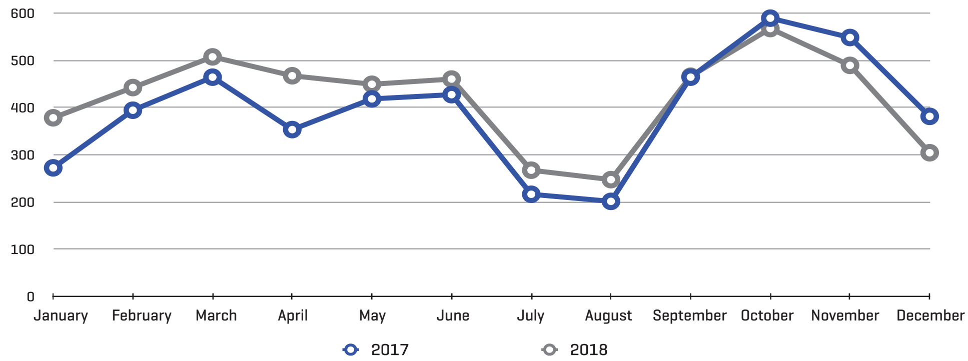
SILESIAN AGGLOMERATION

3.4% more events

In 2018, the Silesian Agglomeration occupancy rate of conference rooms, or their percentage use against their total number available on the market stood at 26%, which marked a 0.3% decline on the 2017 figure. In 2018, however, there were 3.4% more events organised in the Silesian Agglomeration than in 2017.
The increase related to each weekday. The largest number of events was in 2018 on Thursday – up 3.3%, and also on Tuesdays – up 7.5%, and on Wednesdays – up 3.6%.

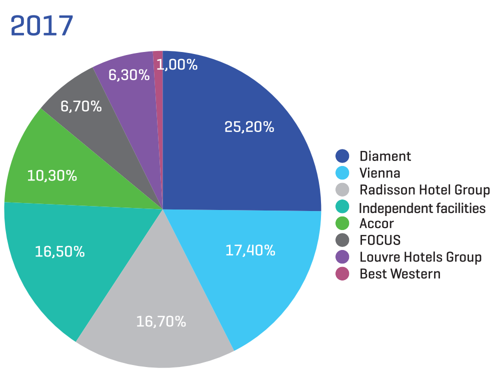
In 2018, the number of meeting held in the Silesian Agglomeration was up by **3.4%** than on the previous year figure.

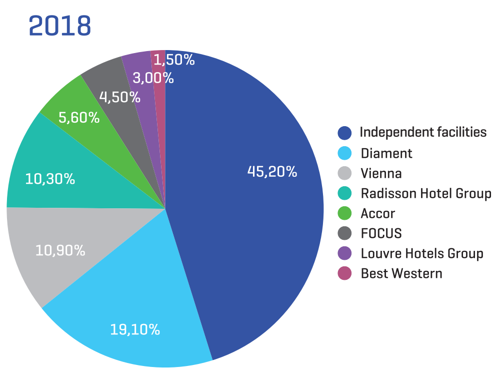
Silesian Agglomeration – number of events per month 2017 vs. 2018



Throughout 2018 the largest number of events in the Silesian Agglomeration was organised in October and March, while in 2017 the largest number of them was organised in October and November.
In 2018, the largest market share in the Silesian Agglomeration was held by independent facilities at 58%, recording an increase of 19.8%. Hotel chains recorded drops here – Diament down by 3.3% to 14.6%, Vienna down by 4.1% to 8.5%, and Radisson Hotel Group down by 4.2% to 7.8%. Given the number of events, the pharmaceutical industry as the strongest one in the Silesian Agglomeration recorded a decline of 4.5%. The education industry showed an increase of 19.5%, while technologies recorded a decline of 11.8%, and consulting and recruitment had a 25.2% growth.

Silesian Agglomeration – occupancy by hotel chain





The most active customer in the Silesian Agglomeration organised 70 events in 2017, translating into a market share of 1.5%, while the next one had 61 events, or a 1.4% market share. In 2018, the most active customer organised 87 events in the Silesian Agglomeration, thus gaining a market share of 1.7%, while the next one had 45 events, or a 1.4% market share.

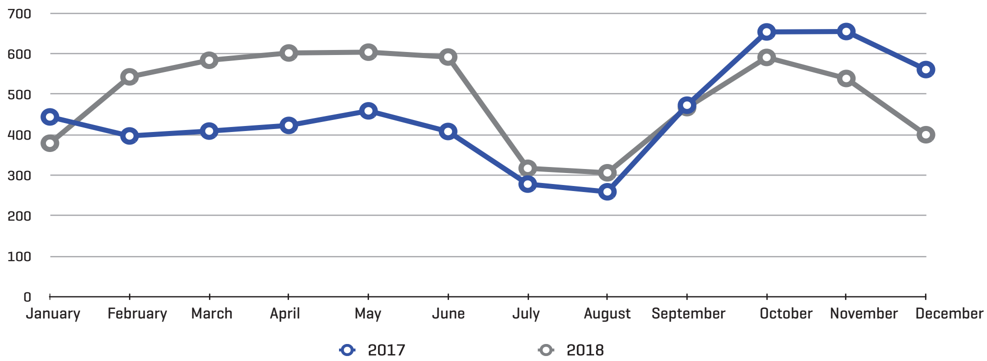
WROCŁAW

10.4% more meetings

In 2018, independent facilities in Wrocław had the largest market share
44.1%

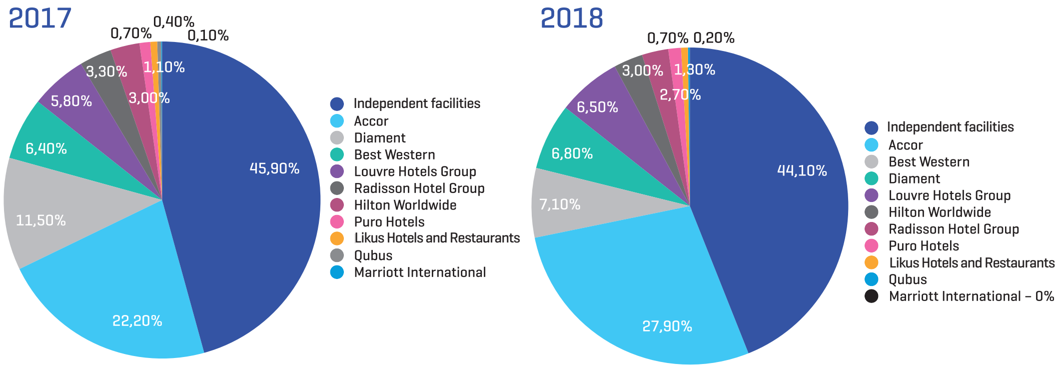
The percentage use of conference rooms in Wrocław against their total number available on that market, or the occupancy of conference rooms stood at 19% in 2018. In comparison to the 2017 figure, it marked a decline of 1.4%.

Wrocław – number of events per month 2017 vs. 2018



In 2018, there were 10.4% more meetings held in Wrocław than in 2017. Increases were recorded on each weekdays. Last year, the largest number of meetings were held on Thursdays – up 5.7%, Tuesdays – up 1%, and on Wednesdays – up 2%.
Throughout 2018 the largest number of events in Wrocław was organised in April and May, while in 2017 the largest number of them was organised in October and November.

Wrocław – occupancy by hotel chain



In 2018, independent facilities, which had the largest market share of 44.1%, recorded a decline of 1.6%. Among the hotel chains the dominant position was held by Accor at 27.7%, which recorded an increase of 5.4%, followed by Best Western, which accounted for 7.1% recording a drop of 3.7%, and Diament at 6.7% showing a gain of 0.2% against 2017. An increase of activities of the two most active industries, pharmaceutical up 27.1% and education up by 21.2% was observed in Wrocław. Technologies recorded a decline of 5.6% and banking down by 12.4%.

In 2017, the most active customer organised 123 meetings, thus gaining a market share of 2.3%, followed by the one with 114 meetings recording a 2.1% market share. In another year 2018, the most active customer, who organised 91 meetings, gained a market share of 1.5%, followed by the one with 75 meetings, and a 1.3% market share.

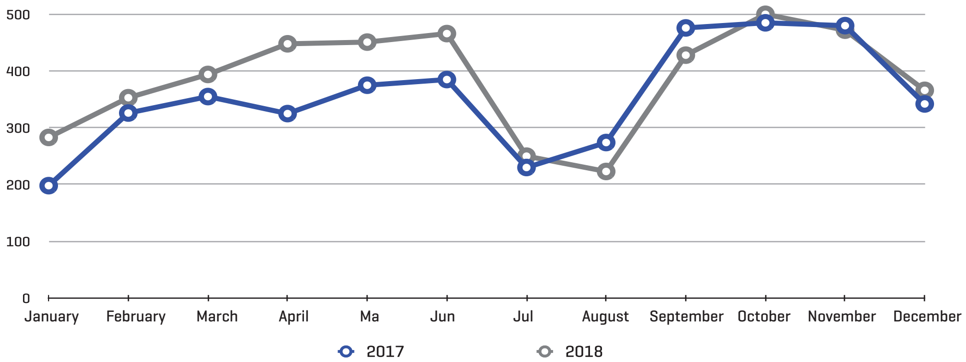
TRI-CITY

9.7% more meetings

The percentage use of conference rooms in the Tri-City against their total number available on that market, or the occupancy of conference rooms stood at 14% in 2018. In comparison to the 2017 figure, it marked a decline of 0.6%.
In 2018, there were 9.7% fewer meetings held in the Tri-City than in the previous year. In 2018, the largest number of meetings held in the Tri-City was on Thursdays – at a steady level compared to the 2017 figure, on Wednesdays – up 3.5%, and on Tuesdays – up 5.3%.
Like in the previous year, the largest number of events organised in 2018 was in October and November.

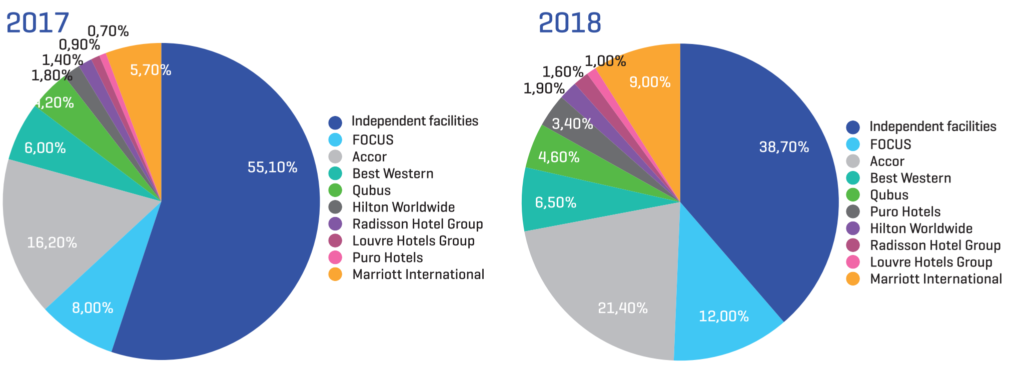
In 2018, the number of meeting held in the Tri-City was up by **9.7%** on the previous year figure.

Tri-City – number of events per month 2017 vs. 2018



In 2018, independent facilities, which had the largest market share of 38.8% in th e Tri-City, recorded a decline of 3.8%. Among the hotel chains the most popular was Accor with a market share of 21.5%, up 0.8%, Focus with a 11.8% share and up 1.6%, Marriott International with a 9.1% share and an increase of 1.6%. In 2018, the most active industry was education and schooling, which, however, recorded a decline in the number of organised meetings by 1.8% compared with the 2017 figure. The pharmaceutical industry showed an increase of 16.3%, technologies recorded growth of 11.4%, sale and distribution was up 10.4%, while consulting and recruitment grew by 13.4%.

Tri-City – occupancy by hotel chain



The most active organisation in the Tri-City organised 67 meetings in 2017, gaining a market share of 1.6%, followed by the one that organised 48 meetings, thus gaining a share of 1.1%. In 2018, the most active companies organised 54 and 50 meetings each, which accounted for their market share of 1.2% and 1.1%, respectively.

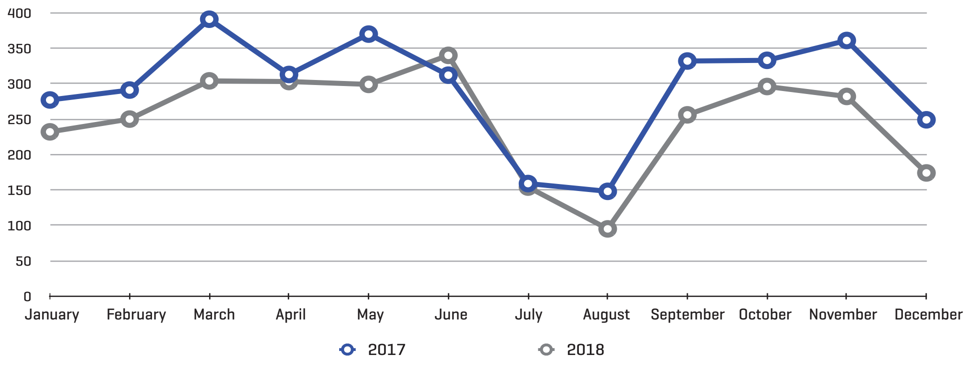
POZNAŃ

15.5% fewer meetings

In 2018, there were **15.5%** fewer meetings held in Poznań than in 2017.

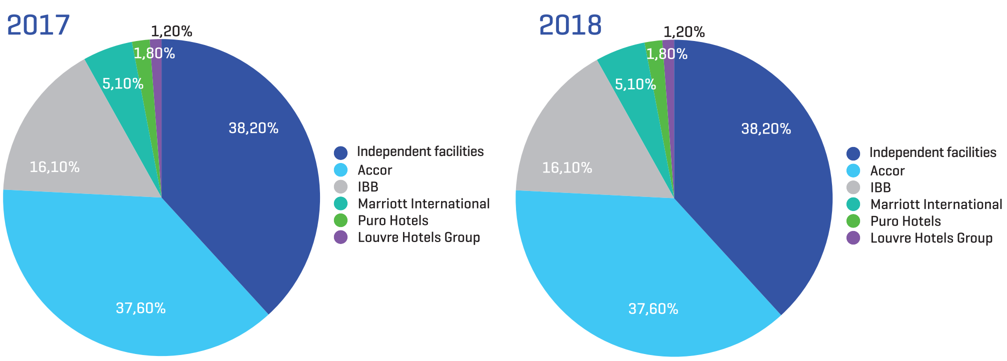
In 2018, the Poznań occupancy rate of conference rooms, or their percentage use against their total number available on the market stood at 12.9%, which marked a 3% decline on the previous year figure.

Poznań – number of events per month 2017 vs. 2018



In 2018, there were 15.5% fewer meetings held in Poznań than in 2017. The largest number of events was organised on Wednesdays – at the same time recording a 14% decline compared to 2017. Popular days were also Thursdays – marking a decline of 13.9% and Tuesdays – showing a decline of 13.7%. Last year, the largest number of meetings in Poznań was organised in June, March, and April, whereas in 2017 it was March, May, and November.
In 2018, the largest market share of 38.1% was held by Accor chain which recorded an increase of 0.1% on the previous year figure. The other strongest brands in Poznań included IBB with a market share of 203% and an increase of 4.4%, Marriott International with a 5.2% share and growth of 0.2%, and Louvre Hotels Group with a share of 1.4% and a decline of 0.3%.

Poznań – occupancy by hotel chain



Among the strongest industries the first place in Poznań was taken by pharmaceuticals which however in 2018 organised 5.3% fewer events there than in 2017, then followed by technologies with 4.3% fewer events, education recording 3.8% more events, and automotive with growth by 13.4%.

The most active organisation in Poznań organised 109 meetings in 2017, gaining a market share of 3.1%, followed by the one that organised 80 meetings, thus gaining a share of 2.3%. In 2018, the most active company organised 88 events which accounted for 3% of a market share, while the second most active one organised 46 evens, thus gaining a share of 1.6%.

LUBLIN

4.2% more meetings

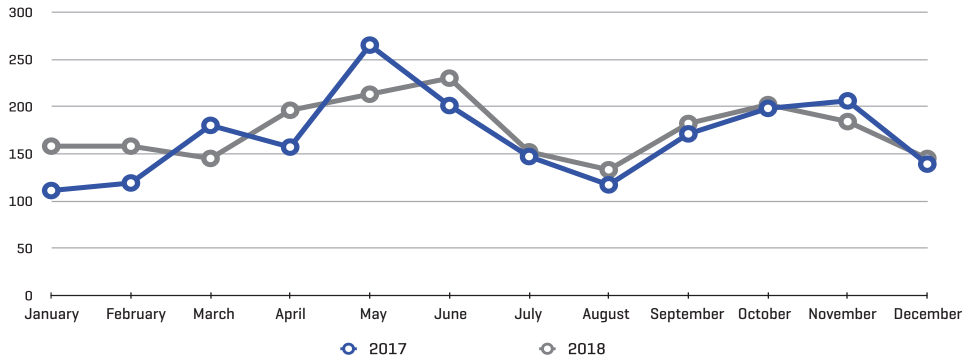
In 2018, the occupancy of conference rooms, or their percentage use against their total number available on the market stood at 6.1% in Lublin. In comparison to the previous year figure, it marked a decline of 1.3%.

In 2018, Lublin hosted 4.2% meetings more than in 2017. Last year, the largest number of meetings were held there on Saturdays – up 17%, Fridays – up 12.1%, and on Thursdays – up 0.8%.
Last year, the largest number of meetings in Lublin was organised in June, and May, whereas in 2017 it was May and November.

In 2018, independent facilities in Lublin had the largest market share

87.4%

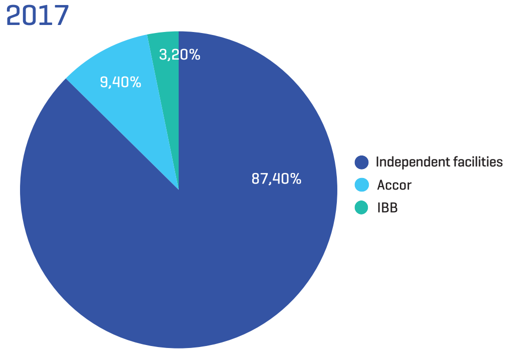
Lublin – number of events per month 2017 vs. 2018

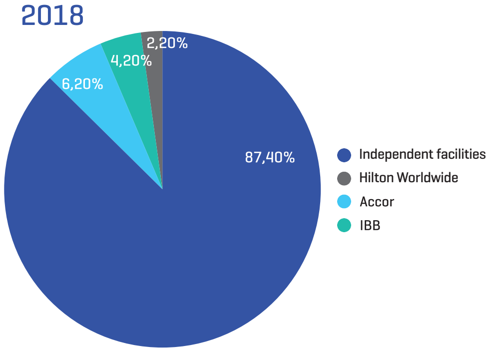


Independent facilities, which had the largest market share of 87.4% in 2018, recorded an increase of 0.1% when compared to 2017. The most active hotel chain was Accor, which compared to 2017, lost 3.3% and recorded a market share of 6.2%, while IBB chain gained 1% and had a market share of 4.2%, and Hilton Worldwide with a share of 2.2% came next.
In 2018, the largest number of meetings in Lublin was organised by private customers recording growth of 19.8% compared to the previous year figure. Education, which was the most active industry, recorded a 9.9% increase in meetings, while the pharmaceutical industry showed a decline of 14.1%.

In 2017, the two most active industries organised 52 meetings in Lublin, each gaining thus a market share of 2.6%. In the previous year the most active customer organised 71 meetings there and had a share of 3.4%, followed by the one with 58 events and a share of 2.8% in the market.

Lublin – occupancy by hotel chain





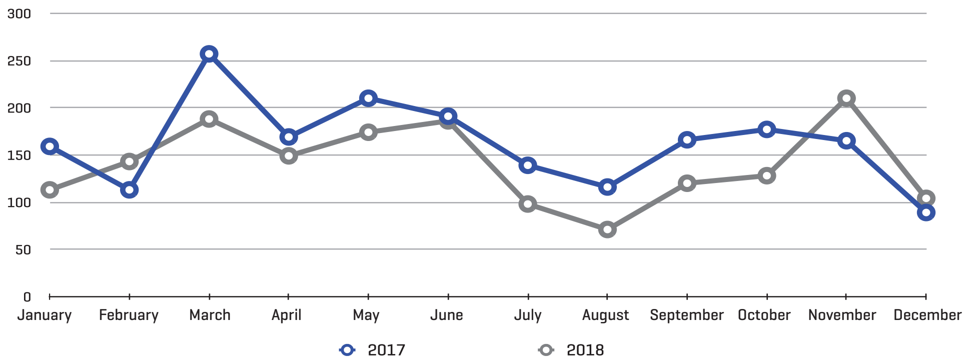
ŁÓDŹ

12.5% fewer meetings

Last year there were
12.5%
fewer meetings
held in Łódź than in the
previous year.

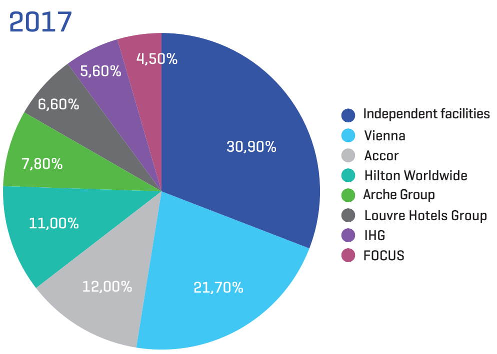
In 2018, the occupancy of conference rooms, or their percentage use against their total number available on the market stood at 10.3% in Łódź. In comparison to the previous year figure, it marked a decline of 3.9%. Last year there were 12.5% fewer meetings held in Łódź than in the previous year. Also individual weekdays recorded declines. In 2018, the largest number of events was held on Thursdays – down by 9.4% and Wednesdays – down by 7.8%.
In 2018, the largest number of meetings in Łódź was organised in March and May, whereas in 2017 it was November.

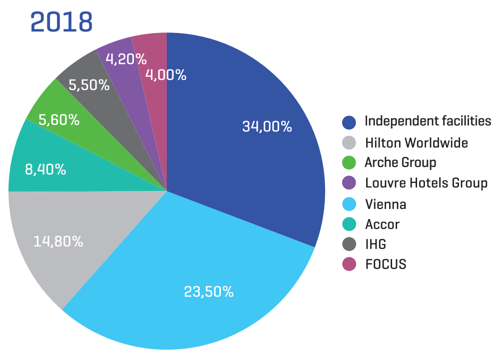
Łódź – number of events per month 2017 vs. 2018



In Łódź the largest market share of 34% was accounted for by independent facilities which, however, recorded a decline of 2.9% in 2018. The most active hotel chains included Vienna with a market share of 23.6% in 2018 and an increase of 1.3%, Hilton Worldwide with a share of 14.9% and growth of 3.2%, and Accor with a share of 8.2% and a decline of 2.7% against the previous year.

Łódź – occupancy by hotel chain





As concerns the number of events held in Łódź, the pharmaceutical industry recorded an increase of 3.7% and education grew by 33%. The other most active industries included technologies recording a decline of 30%, banking with a drop of 38.9%, and other financial institutions with a decrease of 22.8%.
In 2017 the most active customer organised 44 meetings, thus showing a market share of 2.3%, followed by the one with 36 meetings recording a 1.9% market share. In the following year, the most active customers organised 34 and 33 meetings, respectively, thus gaining a market share of 2% each.

2018 vs. 2017: Central and Eastern Europe

Meetings industry in the selected cities

BUDAPEST

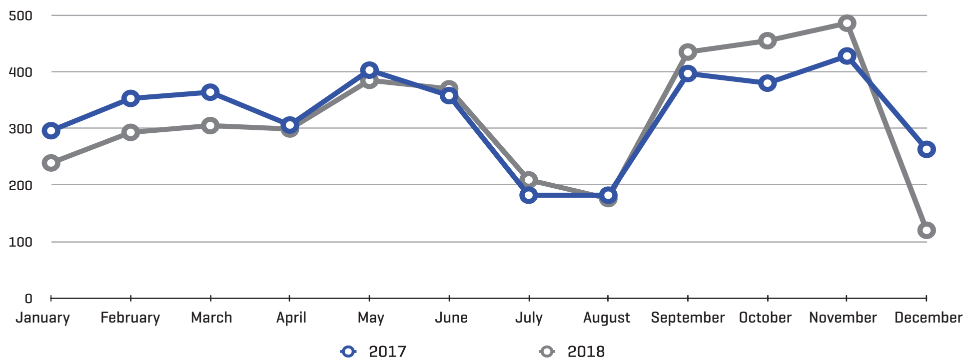
3.7% fewer meetings

In 2018, the Budapest occupancy rate of conference rooms, or their percentage use against their total number available on the market stood at 9.5%, which marked a 1% decline on the previous year figure. In 2018, there were 3.7% fewer meetings held in Budapest than in the previous year. In terms of the number of events held on individual weekdays in 2018, the largest number of them was held on Thursdays marking a 8.3% drop, on Wednesdays, also showing a decline of 8.3%, and on Tuesdays with a decrease of 4.5% against 2017. In 2018, the largest number of meetings organised in Budapest was held in November and October, while in 2017 it was November and May.

In 2018, the largest market share in the capital city of Hungary was accounted for by facilities of Danubius **Hotels Group**

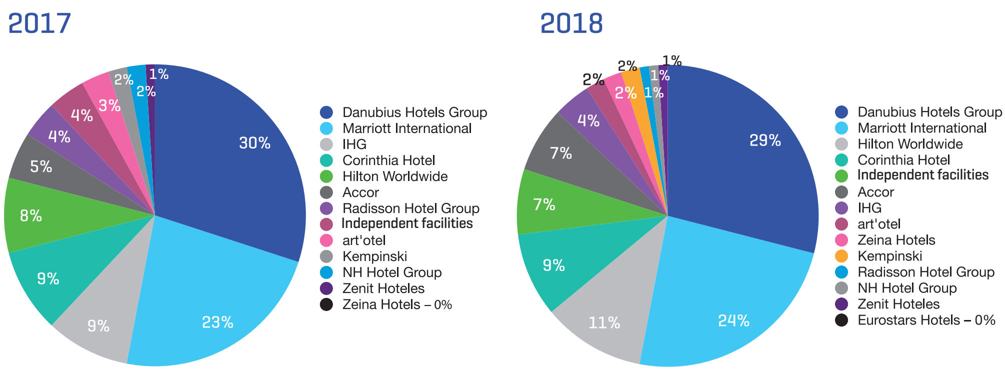
28,4%

Budapest – number of events per month 2017 vs. 2018



In 2018, the facilities of Danubius Hotels Group had the largest market share of 28.4% in the capital city of Budapest, which, compared to 2017, marked a decline of 1.3%. The market share increase was recorded by hotels of Marriott International up 2.1% to 24.7%, and also Hilton Worldwide up 1% to 11.2%. The pharmaceutical industry showed growth in the number of events organised there by 8.5%. Declines in Budapest were recorded by industries such as: technologies down by 10.1%, tourism down by 13.1%, education down by 18.7%, and finance down by 25.4%.

Budapest – occupancy by hotel chain



The most active organisation in Budapest organised 55 meetings in 2017, gaining a market share of 1.4%, followed by the one that organised 40 meetings, thus gaining a share of 1%. In 2018, the most active customers organised 43 and 26 meetings each, which accounted for their market share of 1.2% and 0.7%, respectively.

PRAGUE

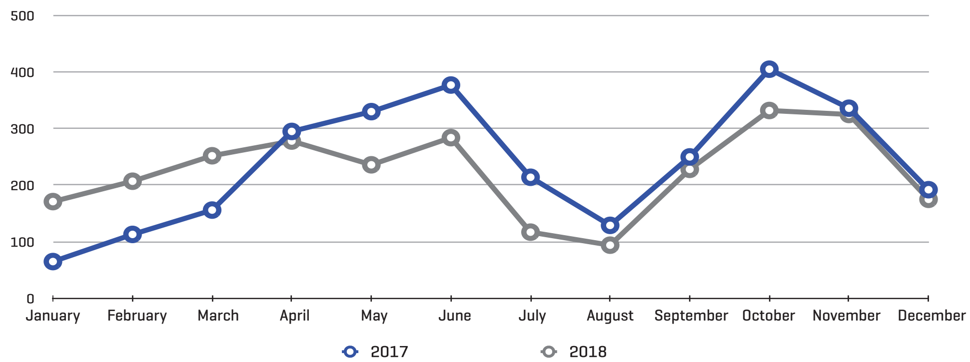
5.9% fewer meetings

In the capital city of the Czech Republic the facilities of Hilton Worldwide had the largest market of **22.6%** in 2018

In Prague, the occupancy of conference rooms, or their percentage use against their total number available on the market stood at 7.7% in 2018. In comparison to the 2017 figure, it marked a decline of 2.1%.

In 2018, there were 5.9% fewer meetings held in Prague than in 2017. Throughout the week the largest number of meetings was held on Thursdays – up 6.6% and on Wednesdays – a decline of 2.4%, and also on Tuesdays – a drop of 6.6% compared to 2017. Throughout 2018 the largest number of events in Prague was organised in October and November, while in 2017 the largest number of them was organised in October and June.

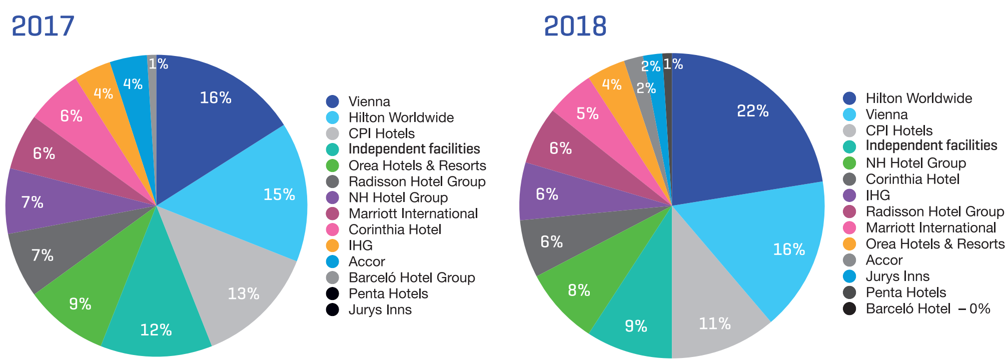
Prague – number of events per month 2017 vs. 2018



In 2018, the largest market share of 22.6% in the capital of the Czech Republic had the facilities of Hilton Worldwide which showed an increase of 6.3%. The other most popular chains included Vienna with a market share of 15.8%, and growth of 1.3% and CPI Hotels with a share of 10.9% and a decline of 2%.

An increase of 5.9% in the share of the pharmaceutical industry, being the most active one in Prague was observed, followed by a decline of 1.1% in technologies, and an increase of 4.2% in consulting, and a drop of 4.8% in education. In 2017, the most active companies organised 29 meetings each in Prague, thus gaining a market share of 1% each. In 2018, the most active companies, too, organised 29 meetings each, which accounted for their market share of 1.1%.

Prague – occupancy by hotel chain



SOFIA

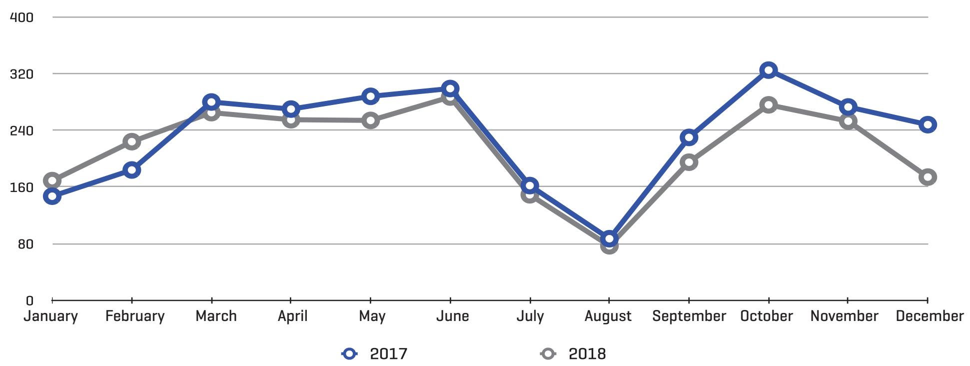
8.4% fewer meetings

In 2018, the Sofia occupancy rate of conference rooms, or their percentage use against their total number available on the market stood at 17.3%, which marked a 0.2% decline on the previous year figure. In 2018, there were 8.4% fewer meetings held in Sofia than in the previous year. In 2018, the largest number of events was organised there on Thursdays – down by 2.6% and Wednesdays – down by 5.2%. Like in the previous year, the largest number of events organised in 2018 was in June and October.

In 2018, independent facilities had the largest market share in Sofia

35.8%

Sofia – number of events per month 2017 vs. 2018

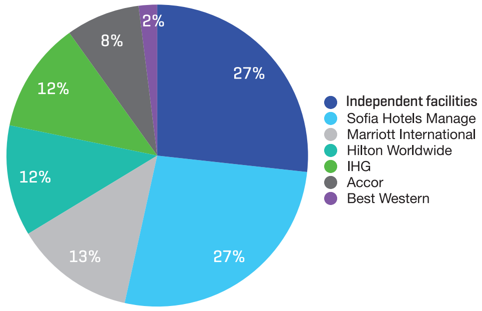


In 2018, independent facilities, which had the largest market share of 35.8% in Sofia, recorded an increase of 7.8%. Among the hotel chains the most popular was Sofia Hotels Management with a market share of 22.8%, showing a decline of 2.4%, Accor with a 13% share and a drop of 0.1%, Marriott International with a 9.5% share and a decline of 3.4%. As concerns the number of organised meetings, the most active industry in 2018 were technologies showing a decline of 19.6% against the previous year figure, followed by government and political meetings recording a decline of 13%, consulting and recruitment with a drop of 11.8%, and the pharmaceutical industry that recorded a decline of 9.7%.

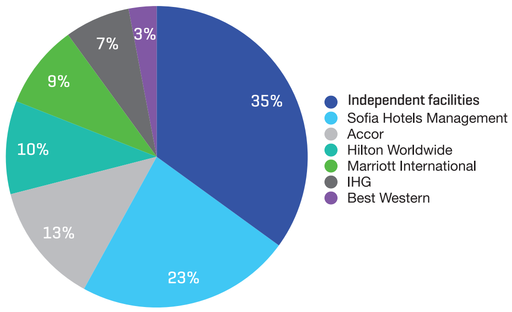
The most active company in Sofia organised 46 meetings in 2017, gaining a market share of 1.7%, followed by the one that organised 45 meetings and gained a share of 1.6%. In 2018, the most active company organised 53 meetings there and had a share of 2.1% in the market, followed by the one with 40 events and a market share of 1.6%.

Sofia – occupancy by hotel chain

2017



2018



In 2018, the largest market share in the capital city of Romania was accounted for by facilities of **Ramada Worldwide**

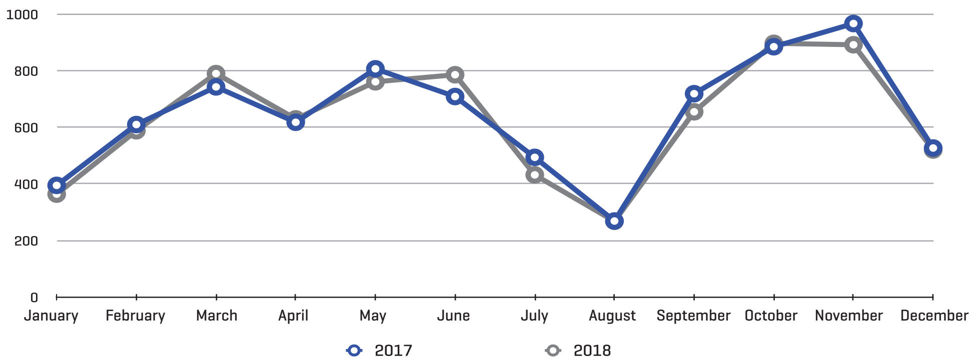
22,6%

BUCHAREST

2.3% fewer meetings

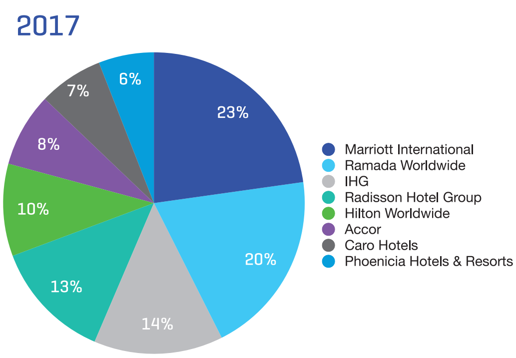
In Bucharest, the occupancy of conference rooms, or their percentage use against their total number available on the market stood at 25.9% in 2018. This marks a decline of 0.6% on the previous year figure. In 2018, there were 2.3% fewer meetings held in Bucharest than in the previous year. In terms of the number of events held on individual weekdays in 2018, the largest number of them was held on Thursdays marking a 2.6% drop, on Tuesdays, showing an increase of 3.6%, and on Wednesdays marking growth of 0.4% against 2017. In 2017, the largest number of meetings in Bucharest was held in November, while in 2018 it was November and October.

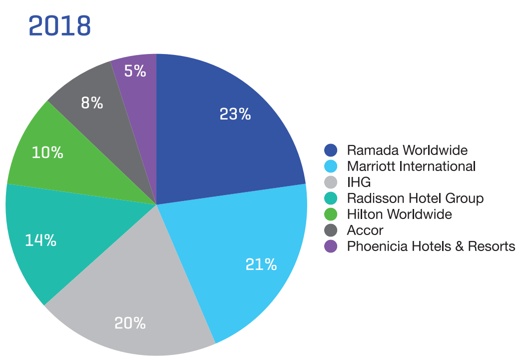
Bucharest – number of events per month 2017 vs. 2018



In 2018, the facilities of Ramada Worldwide had the largest market share of 22.6% in the capital city of Romania, which, compared to 2017, marked a decline of 0.4%.
The market share increase was recorded by hotels of Marriott International up 0.9% to 20.6%, and also by IHG up 5.9% to 19.9%. The pharmaceutical industry showed growth in the number of events organised there by 4%. In turn, declines were recorded by other industries most active in Bucharest, or technologies down by 15% and consulting and recruitment down by 3.8%.

Bucharest – occupancy by hotel chain





In 2017, the most active organisations in Bucharest organised 59 and 58 meetings, respectively, gaining a market share of 0.8%. In 2018, the most active customer organised 62 meetings, which accounted for its market share of 1.2%, while the next one organised 52 meetings, gaining a share of 0.7%.

2018: Central and Eastern Europe

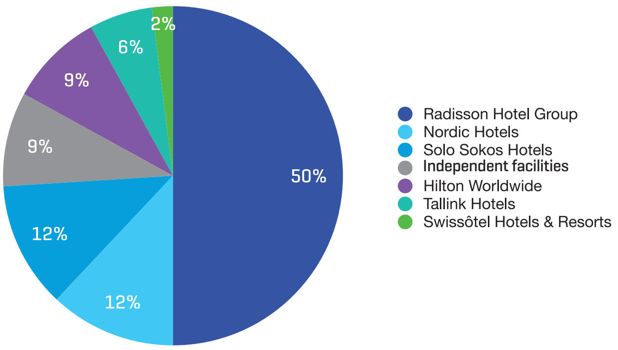
Meetings industry in the selected cities

TALLINN

– occupancy of conference rooms of 11.7%

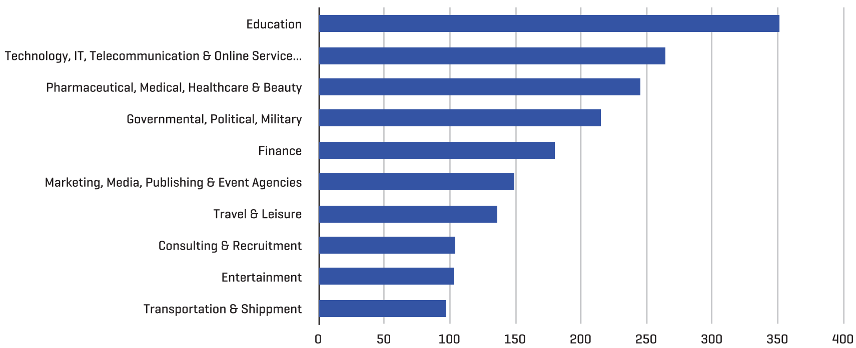
In 2018, Demand Outlook gained data on 2,949 meetings organised in Tallinn. The average occupancy rate of the total available conference and catering space amounted there to 7.9%, and the occupancy of conference rooms, or their percentage use against their total number available on the market stood at 11.7%. Facilities of Radisson Hotel Group had the largest share in using the available conference space in Tallinn accounting for 49.8%, followed by Nordic Hotels with a share of 12.3%.

Tallinn – occupancy by hotel chain in 2018



Solo Sokos Hotels – 11.6% and independent facilities – 9.2%. Meetings in Tallinn were most frequently organised in May and March.
In 2018, the most active industry was education with 349 meetings, followed by technologies with 263 meetings, and pharmaceuticals with 249 meetings.

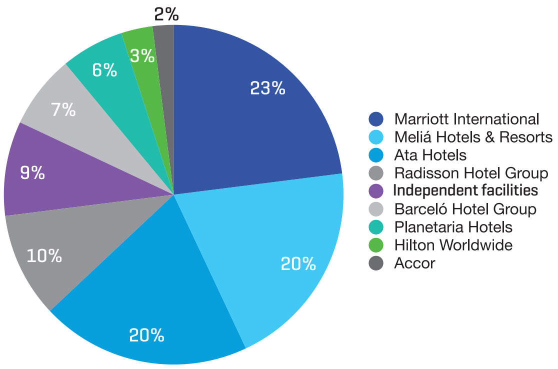
10 most active industries in Tallinn



MILAN
– occupancy of conference rooms of 13.1%

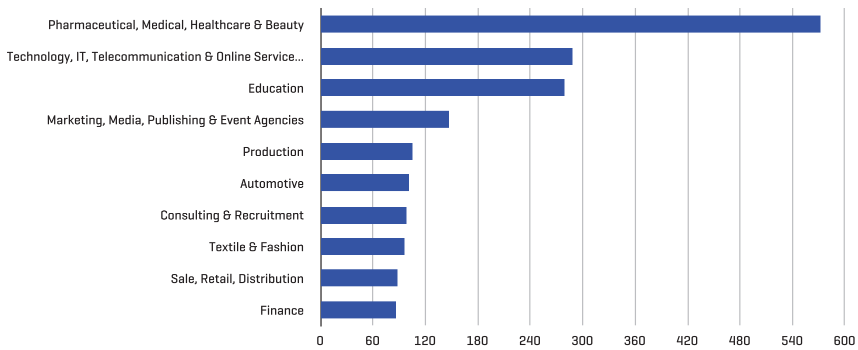
In 2018, Demand Outlook recorded data on 2,437 meetings organised in Vilnius. The average occupancy rate of the total available conference and catering space amounted there to 11%, while the occupancy of conference rooms, or their percentage use against their total number available on the market stood at 13.1%.

Milan – occupancy by hotel chain in 2018



The largest available conference space was used by Marriott International – 23.6%, Meliá Hotels & Resorts – 20.5%, Ata Hotels – 20.3%, and Radisson Hotel Group – 9.5%. The most active industries were: pharmaceuticals with 557 meetings, technologies with 281 meetings, education with 261 meetings, advertisement with 143 meetings. Meetings in Milan were most frequently organised in November, May, February, and March.

10 most active industries in Milan

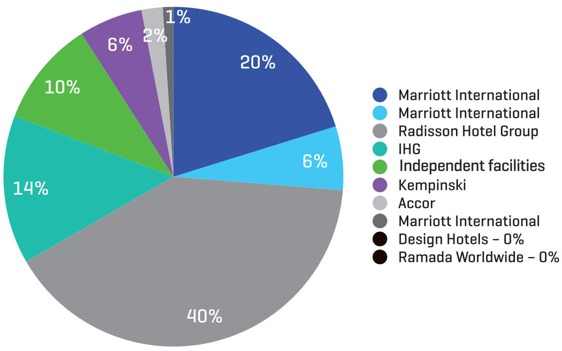


VILNIUS
– occupancy of conference rooms of 17.1%

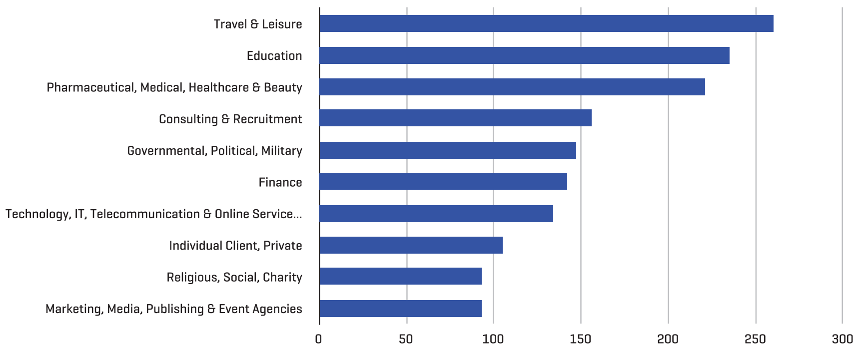
In 2018, Demand Outlook collected data on 2,330 meetings organised in Vilnius. The average occupancy of the total available conference and catering space stood at 17.9% in the capital city of Lithuania. The occupancy of conference rooms, or their percentage use against their total number available on the market stood at 17.1%.

The available conference space in Vilnius was used most by facilities of Radisson Hotel Group – 53.7%, IHG – 19.3%, independent facilities – 13.1%, and Kempinski – 8.3%. The most active industries in Vilnius included tourism with 249 meetings, followed by pharmaceuticals with 220 meetings, and consulting with 151 meetings. Meetings in Vilnius were most frequently organised in September and October.

Vilnius – occupancy by hotel chain in 2018



10 most active industries in Vilnius

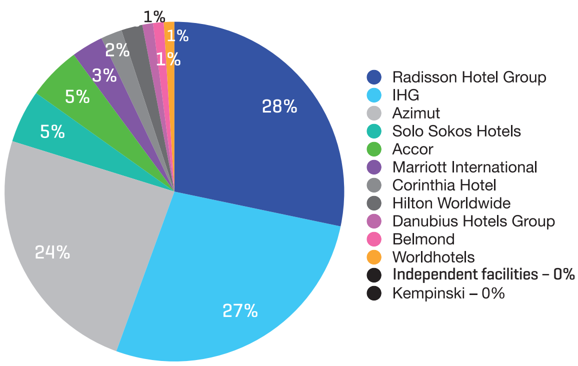


SAINT PETERSBURG

– occupancy of conference rooms of 11.9%

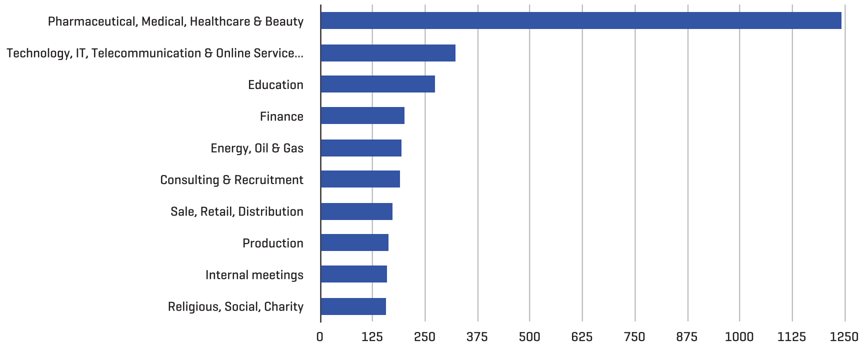
In 2018, Demand Outlook collected data on 4,896 meetings organised in Saint Petersburg. The average occupancy of the total available conference and catering space there stood at 12.9%. The occupancy of conference rooms, or their percentage use against their total number available on the market stood at 11.9%.

Saint Petersburg – occupancy by hotel chain in 2018



The largest market share had facilities of Radisson Hotel Group – 28.6%, and also IHG – 26.6%, and Azimut – 23.8%. In 2018, the most active industries in Saint Petersburg included the pharmaceutical industry with 1,249 meetings, technologies with 324 meetings, and education with 270 meetings. Meetings in Saint Petersburg were most frequently organised in April and November.

10 most active industries in Saint Petersburg

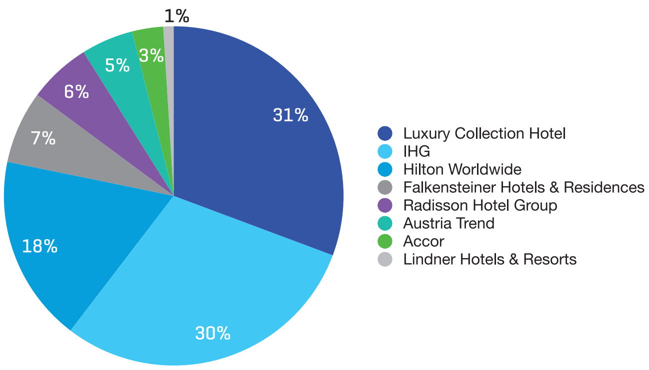


BRATISLAVA

– occupancy of conference rooms of 17.5%

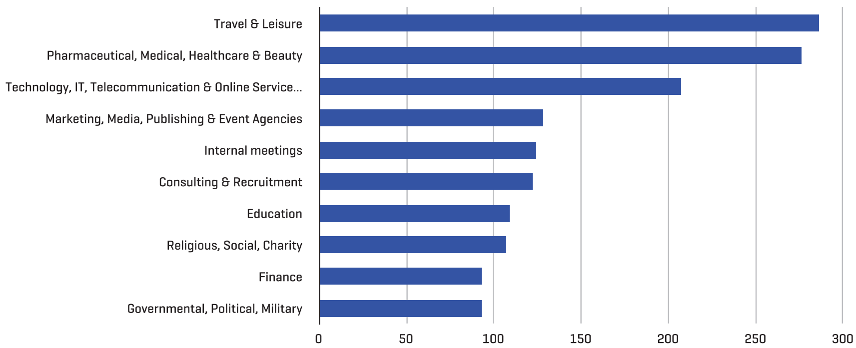
In Bratislava Demand Outlook obtained data on 2,237 meetings organised there in 2018. The average occupancy of the total available conference and catering space there stood at 13.4%. The occupancy of conference rooms, or their percentage use against their total number available on the market stood at 17.5%.

Bratislava – occupancy by hotel chain in 2018



The largest market share in Bratislava was held by facilities of Luxury Collection Hotel – 29.8%, IHG – 29.7%, and Hilton Worldwide –18.3%.
The most active industries in Bratislava included tourism with 285 meetings, pharmaceuticals with 275 meetings, and technologies with 204 meetings.
Most meetings were organised in Bratislava in October, September, and November.

10 most active industries in Bratislava

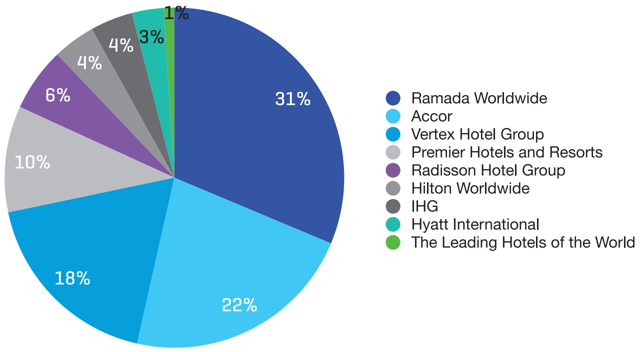


KIEV

– occupancy of conference rooms of 13.6%

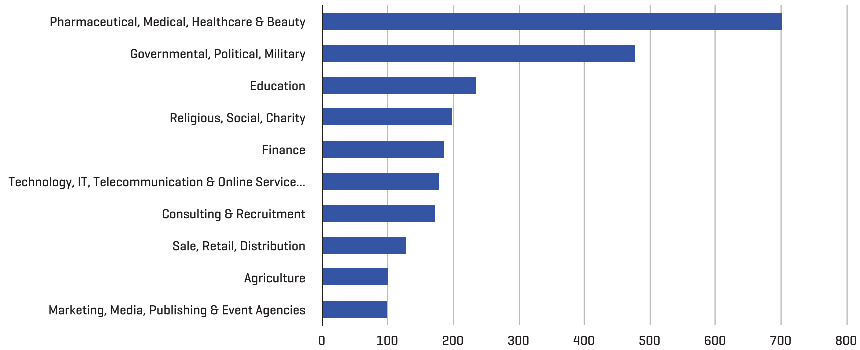
In 2018, Demand Outlook collected data on 3,399 meetings organised in Kiev. The average occupancy rate of the total available conference and catering space amounted to 11%, while the occupancy of conference rooms, or their percentage use against their total number available on the market stood at 13.6%.

Kiev – occupancy by hotel chain in 2018



The available conference space in Kiev was used most by facilities of Ramada Worldwide – 30.8%, Accor – 21.8%, and Vertex Hotel Group – 18.7%.
The most active industries in Kiev included the pharmaceutical industry with 694 events, government and political events with 471 meetings, and education with 233 events.
In 2018, most meetings in Kiev were organised in November, March, and October.

10 most active industries in Kiev



METHODOLOGY AND RESEARCH SAMPLE

For the purpose of the Demand Outlook system in Poland and in 16 European countries, we collect information on meetings held in conference, catering, and banquet areas, on a daily basis and in a methodological manner. After precise verification of such data, it is presented online even on the same day. It should be noted that the number of monitored cities and facilities in Europe regularly increase, and over the analysed years the total area of facilities analysed by Demand Outlook in Poland has also changed.

The report presents the data for all of Poland collected in 2017 from 86.8m sq.m., of which 72.8% was accounted for by conference space, while the remaining 28.2% by catering. In 2018, the data for Poland was collected for 80.1m sq.m. Of which 70.9% was accounted for by the conference space, and 29.1% by catering space.

As concerns the towns outside Poland presented in this analysis in a comparative section – Prague, Budapest, Sofia, and Bucharest – Demand Outlook analysed meetings held in 2017 in 3.7m sq.m. – of which 96.6% was accounted for by conference space, and 3.4% by catering. In 2018, there was the space of 3.7m sq.m. monitored, of which 96.1% was conference space, while catering accounted for 3.9%.

As concerns the foreign cities listed outside the comparative section, or Tallinn, Milan, Vilnius, and Saint Petersburg, Bratislava, and Kiev, in the reporting year of 2018, Demand Outlook collected data for 33.5m sq.m., provided that 78.2% of that space was accounted for by conference space, and 21.8% by catering.

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Kontakt:
Z-Factor Sp. z o.o. s.k.
Batorego 20 lok 6, 31-155 Kraków, Poland
info@zfactor.pl
zfactor.pl