

THE MEETINGS INDUSTRY
IN EUROPE AND POLAND

Demand Outlook

2019 vs 2018



INTRODUCTION

The data concerning the meetings industry accumulated by Z-Factor have helped hotels, conference centres and convention bureaux in almost 30 countries in Europe and worldwide to undertake efficient sales decisions for 5 years already. Day by day, the most up-to-date information about recent events are entered to its own analytical system, Demand Outlook. Current results of everyday analyses include Azerbaijan, Austria, Belarus, Bulgaria, Czech Republic, Denmark, Estonia, Greece, Georgia, Hungary, Israel, Italy, Lithuania, Northern Macedonia, Malta, Germany, Poland, Russia, Romania, Serbia, Slovakia, Turkey and Ukraine.



"We know for sure that we are able to reach the greater amount of data in Poland and the entire region of Central and Eastern Europe than anybody has managed to do before us. We hope this summary information from the entire Demand Outlook system we are making available today will be useful for you and inspire further business ventures."

Wojciech, Edyta & Z-Factor team

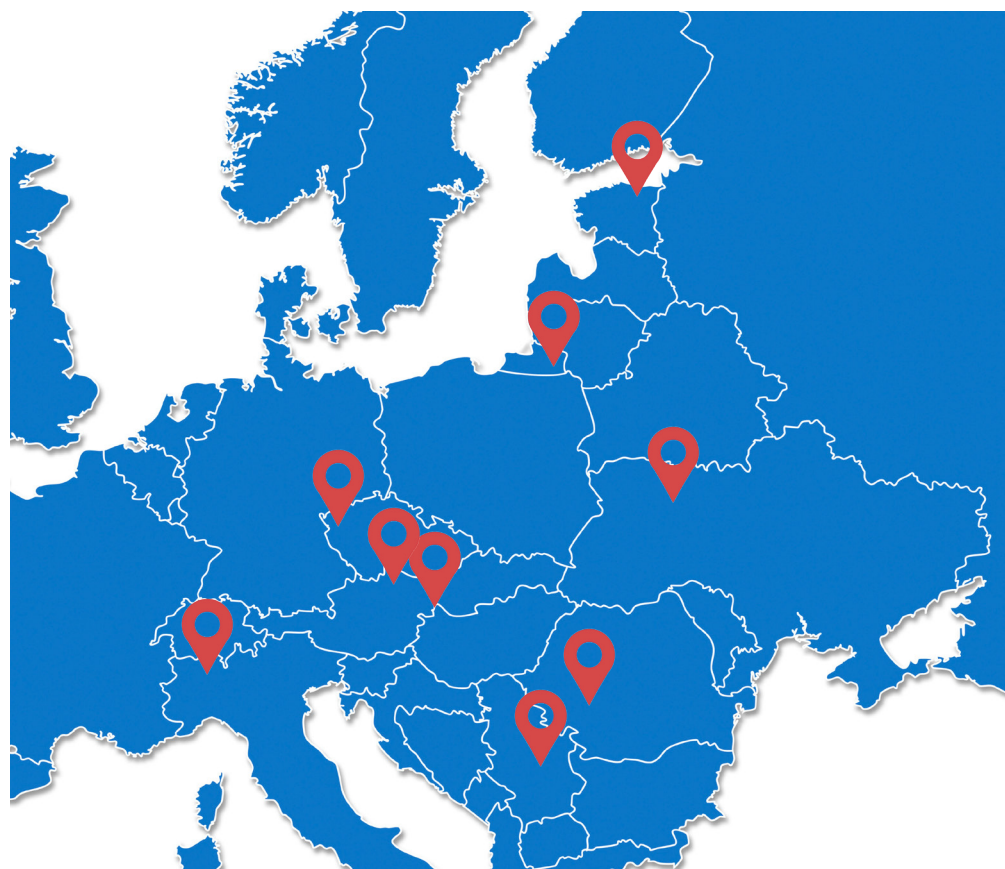
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Contact:

SELECTED CITIES IN CENTRAL AND EASTERN EUROPE COMPARATIVE ANALYSIS 2019 vs 2018

Introduction and Methodology

The comparative analysis 2019 vs 2018 of selected cities in Central and Eastern Europe: **Bucharest, Sankt Petersburg, Kiev, Budapest, Milan, Vilnius, Prague, Sofia and Bratislava.** In these cities in 2019, Demand Outlook reached information concerning 32,173 meetings which took place on 7.3m m2 of conference and catering area. For 2018, the report takes into account information about 31,879 meetings in these cities, occurring on 7.5m m2 of area.



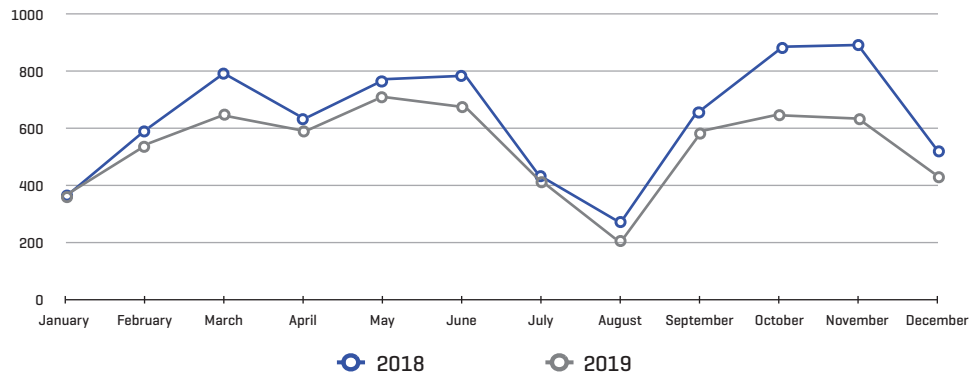
BUCHAREST

Conference hall occupancy rate - i.e. the percentage of available conference halls sold in the year, amounted to **21.3%** in 2019, which means a **fall by 4.2%** with reference to 2018.

General indicators

In facilities monitored by Demand Outlook in Bucharest, there were 14.9% fewer events in 2019 than in 2018. In 2019, most meetings took place in May, whereas in 2018 it was October.

Bucharest - the number of events per month 2018 vs. 2019

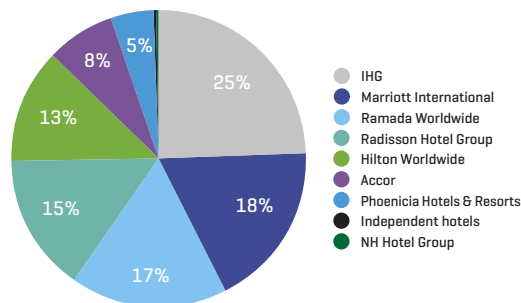


Conference hall occupancy rate - i.e. the percentage of available conference halls sold in the year, amounted to 21.3% in 2019, which means a fall by 4.2% with reference to 2018.

Occupancy rate by hotel chain

In Bucharest in 2019, IHG group facilities had by far the greatest market share, as 24.5% of the entire available space was occupied there. It means the increase by 1.9% in comparison to 2018. Another hotel chain of major popularity is Marriott International, in which the occupancy rate amounted to 18.2% in 2019, which means a drop by 2.4%. Ramada Worldwide also reported a decline - by 2.8% from the level of 19.9% to 17.1% 2019.

2019



Trends by days of the week

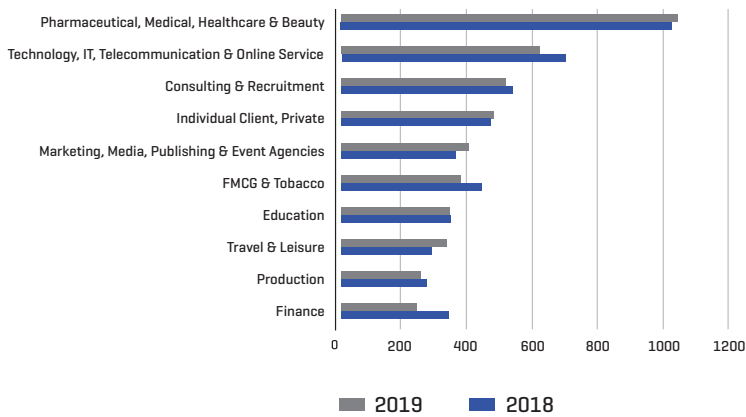
With reference to the number of events on particular days of the week in 2019, most of them took place on Thursdays - decrease by 11.9% with reference to 2018, Wednesdays - decline by 10.2% in comparison to 2018 and on Tuesdays - drop by 17.2%. Generally, the highest occupancy rate was observed on Thursdays and Wednesdays, 24.4% and 23.4%, respectively.

Sectors

All sectors which meet in Bucharest reported a drop in the number of organized events - including the most active industry, pharmaceutical - by 7.3%, IT/Technology - by 12.2%, consulting - by 9.5% and private customers - by 25%.

The most active organization in Bucharest organized 69 meetings in 2019, achieving 1.1% market share.

10 most active sectors in Bucharest - 2018 vs. 2019



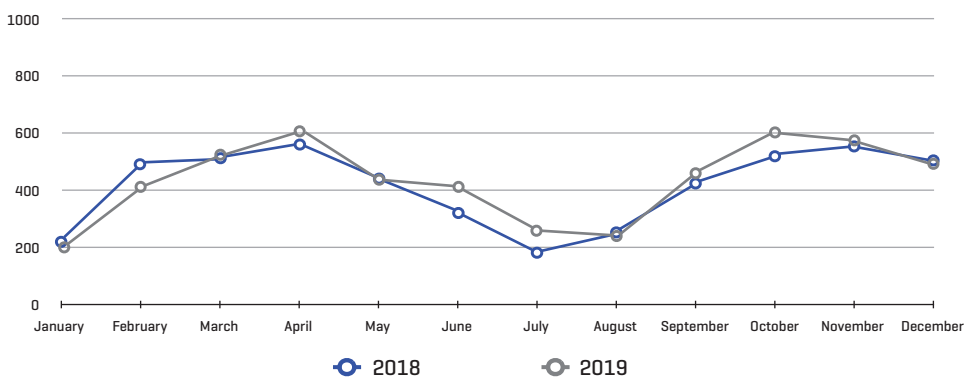
SANKT PETERSBURG

General indicators

In monitored facilities in Sankt Petersburg, 4.4% more events took place in 2019 than in 2018. In both reported periods, most meetings took place in April.

The most active organization in Sankt Petersburg organized **100 meetings** in 2019, achieving **1.9% market share**

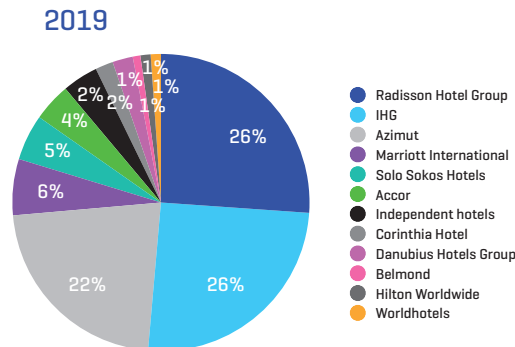
Sankt Petersburg - the number of events per month 2018 vs. 2019



Conference hall occupancy rate in Sankt Petersburg in 2019 amounted to 11.7%, which means the increase by 1,3% with reference to 2018.

Occupancy rate by hotel chain

Three hotel chains built by far the strongest market positions in 2019. The first one are the facilities belonging to Radisson Hotel Group, in which 28.6% of the entire available room space was occupied in 2019. It means, however, the drop by 2.7% in comparison to 2018. IHG Group obtained 25.5% and hence reported the decrease by 1.1%. The third most popular hotel chain - Azimut - reported the room space occupancy rate at the level of 22.4%, which means a decline by 1.4% in comparison to the year 2018.



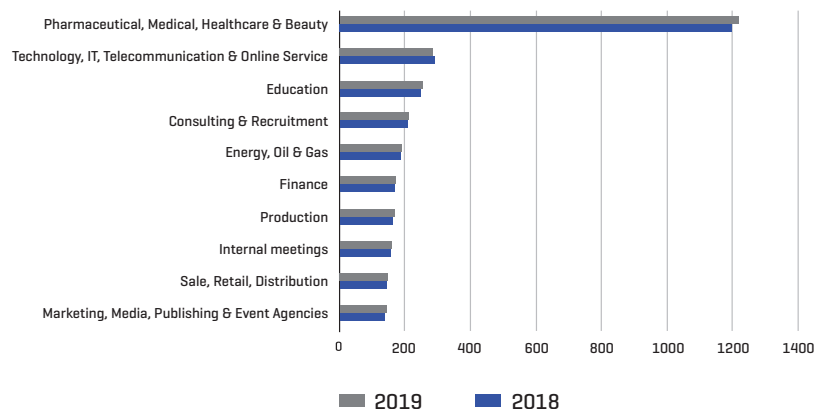
Trends by days of the week

As regards the number of events occurring on particular days of the week in Sankt Petersburg in 2019, most of them took place on Thursdays - increase by 10% with reference to 2018, Wednesdays - drop by 15.6% compared to 2018 and on Friday - rise by 6.2%. The occupancy rate in 2019 was highest on Thursdays - 19.3% - increase by 3.6% with reference to 2018 and on Fridays - 17.7% - increase by 1.8%.

Sectors

In Sankt Petersburg, the most active industry was the pharmaceutical sector, which organized 1.8% meetings more in 2019 than a year before. The educational sector had 15.1% more meetings than in 2018, whereas the IT/technological industry had 16.3% more meetings. The most active organization in Sankt Petersburg organized 100 meetings in 2019, achieving 1.9% market share.

10 most active sectors in Sankt Petersburgu - 2018 vs. 2019



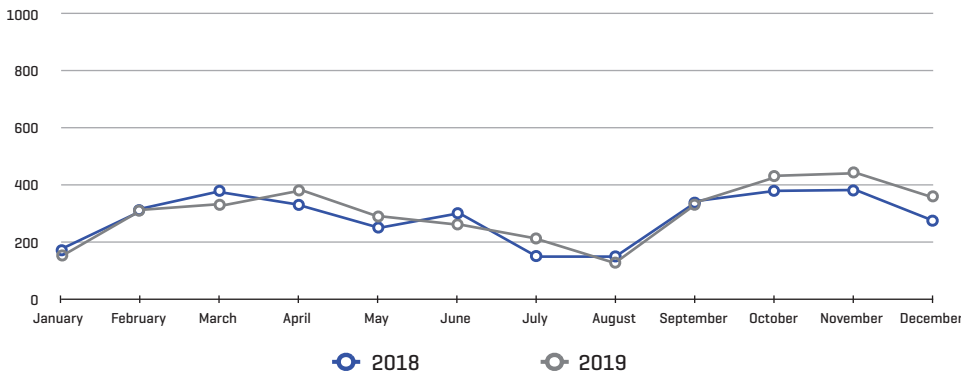
KIEV

General indicators

There were 5.3% more events in Kiev in 2019 than in 2018. In 2019, most meetings took place in November - which was also the case in 2018.

In 2019, the conference hall occupancy rate in Kiev amounted to **13.1%**, which means an **increase by 0.1%** with reference to 2018.

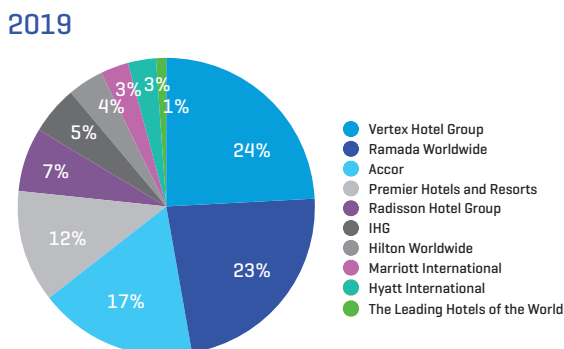
Kijów - the number of events per month 2018 vs. 2019



In 2019, the conference hall occupancy rate in Kiev amounted to 13.1%, which means an increase by 0.1% with reference to 2018.

Occupancy rate by hotel chain

Facilities belonging to Vertex Hotel Group had the greatest market share in 2019. Their available space was occupied in 24.1%, which means the drop by 6.8% compared to 2018. Another hotel chain of major popularity is Ramada Worldwide, in which the occupancy rate amounted to 23% in 2019. It means the increase by 1.1% for the facilities of this chain. Accord Group reported a drop in the occupied rate by 1.7% in Kiev, to the rate of 17.1%.



Trends by days of the week

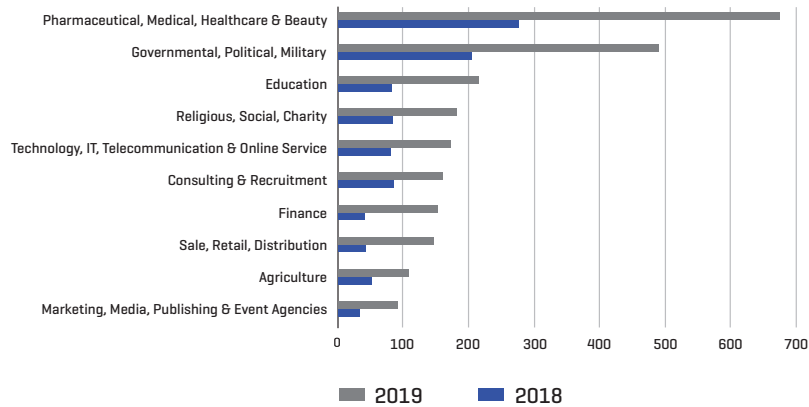
In 2019, Kiev reported the greatest number of events on Thursdays - increase by 3.9% compared to 2018, on Wednesdays - increase by 8.2% with reference to 2018 and on Tuesdays - increase by 4.9%. On Thursdays and Wednesdays, the observed occupancy rate in 2019 was also the highest - the increase on both days amounted to 2.1%.

Sectors

The growth in the number of events was reported in Kiev by all leading sectors - including pharmaceutical sector, the most active - by 8.6%, and government/military sector - by 5.5% as well as sector of education - by 17.1%.

The most active organization in Kiev organized 66 meetings in 2019, achieving 1.8% market share.

10 most active sectors in Kiev - 2018 vs. 2019



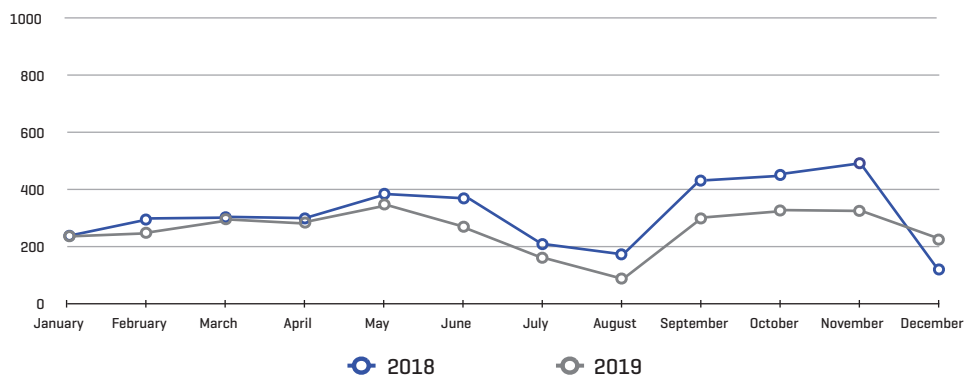
BUDAPEST

The occupancy rate of conference halls in Budapest amounted in 2019 to **8.2%**, which means the **decline by 1.3%** with reference to 2018.

General indicators

In Budapest, 17.1% more events took place in 2019 than in 2018. In 2019, most meetings took place in May, whereas in 2018 it was November.

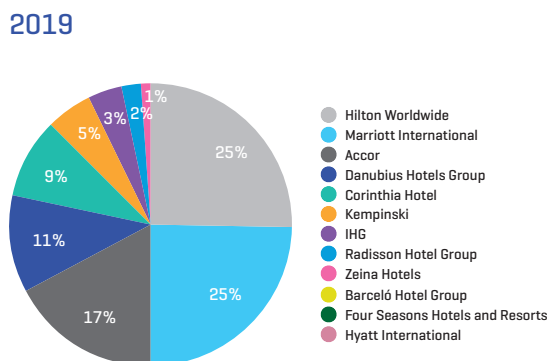
Budapest - the number of events per month 2018 vs. 2019



The occupancy rate of conference halls in Budapest amounted in 2019 to 8.2%, which means the decline by 1.3% with reference to 2018.

Occupancy rate by hotel chain

In 2019 in Budapest, Hilton Worldwide Group facilities had the greatest market share with the occupancy rate of 25.3%, which for this group means the drop of 3.1% compared to 2018. The second most popular hotel chain is Marriott International, which in 2019 reported the occupancy rate of 24.5% - which is also an insignificant drop of 0.2% compared to the preceding year. Accord Group, however, reported an increase by 6.2% to the rate of 17.4%.



Trends by days of the week

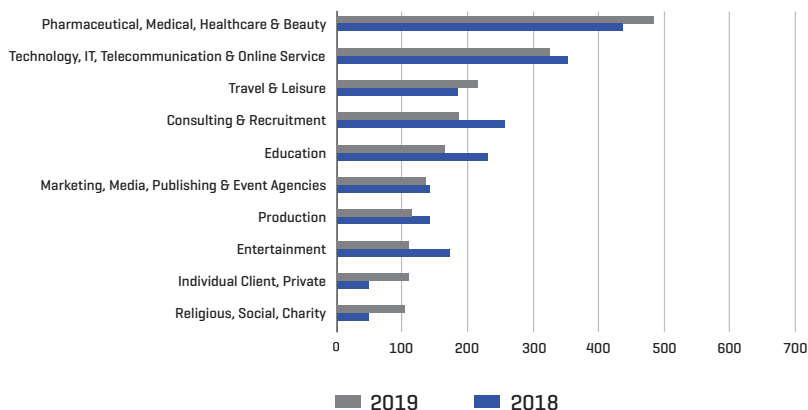
As regards the number of events on particular days of the week, most events in Budapest in 2019 occurred on Tuesdays - the drop by 7% compared to 2018, Thursdays - the drop by 9.6% with reference to 2018 and on Wednesday - drop by 9.2%. In 2019, the highest occupancy rate was reported on Thursdays and Wednesdays, 17.3% and 16.4%, respectively.

Sectors

In the capital of Hungary, the drop was reported by the most active industry, which was pharmaceutical - by 26.5%, as well as IT/Technology sector - by 25%. The consulting sector had 4.2% more events than in the preceding year.

The most active client organized 78 meetings in Budapest in 2019, achieving 2.5% market share.

10 most active sectors in Budapest - 2018 vs. 2019



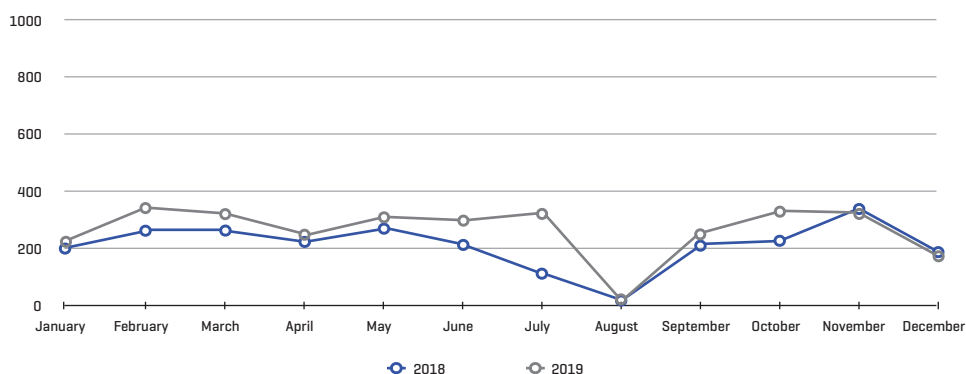
MILAN

In 2019, the conference hall occupancy rate in Milan amounted to **14.1%**, which means an **increase by 1%** with reference to 2018.

General indicators

In the monitored facilities in Milan, in 2019 there were 20.6% more events than in 2018. In 2019, most meetings took place in November, whereas in 2018 it was February.

Mediolan - the number of events per month 2018 vs. 2019

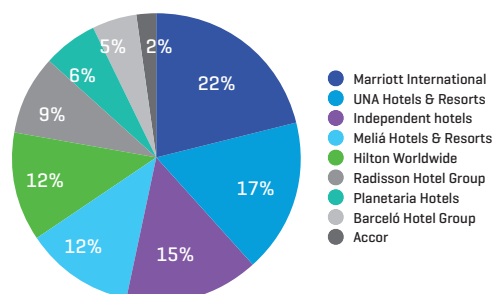


In 2019, the conference hall occupancy rate in Milan amounted to 14.1%, which means an increase by 1% with reference to 2018.

Occupancy rate by hotel chain

In 2019, Marriott International facilities had the greatest market share in Milan, as 21.8% of all available space was occupied in them. It means the increase by 1.3% in comparison to 2018. Another hotel chain of major popularity was UNA Hotels & Resorts, which reported the occupancy rate amounting to 17% in 2019, which means a drop by 3%. Independent hotels also reported a decline - by 4.5% from the level of 19.8% to 15.3% in 2019.

2019



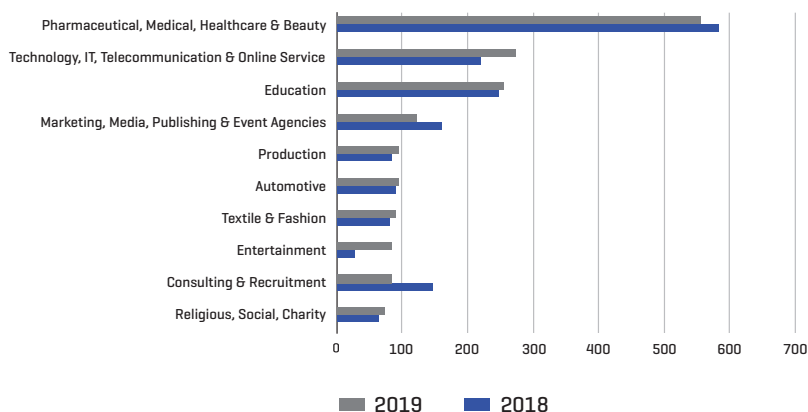
Trends by days of the week

In terms of the number of events on particular days of the week in 2019, most of them occurred in Milan on Wednesdays - the increase by 30.5% with reference to 2018, on Tuesdays - the rise of 33.4% compared to 2018 and on Thursdays - the increase by 31.9%. The highest occupancy rate in 2019 was observed on Thursdays - the increase by 4.1% and on Wednesdays - the increase by 4.2%.

Sectors

The most active industry in Milan - the pharmaceutical sector, showed an increase of 37.7% in comparison to 2018. The sector of education showed an increase of realized events by 18.8%. Also another most active sector - IT/technological, showed an increase - by 10.7%. The most active company in Milan organized 55 meetings in 2019, achieving 1.8% market share.

10 most active sectors in Milan - 2018 vs. 2019



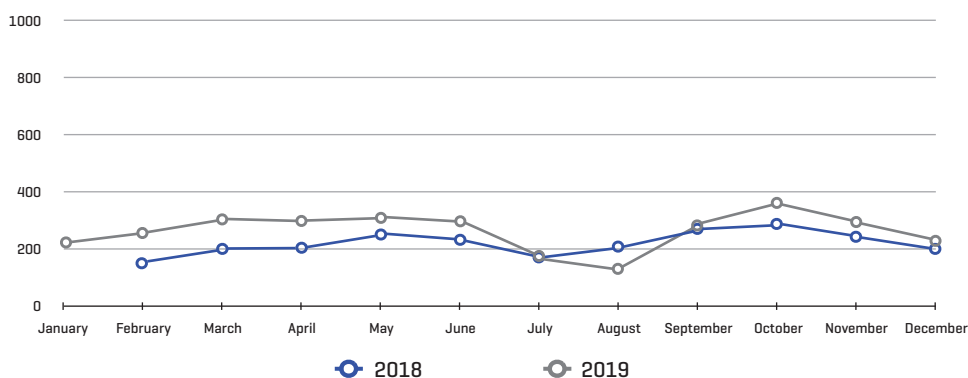
VILNIUS

General indicators

In conference centres monitored by Demand Outlook in Vilnius, 32.4% events more occurred in 2019 than in 2018. In 2019, most meetings took place in October, whereas in 2018 it was September.

The occupancy rate of conference halls in Vilnius amounted in 2019 to **21.1%**, which means the **increase by 4.1%** with reference to 2018

Wilno - the number of events per month 2018 vs. 2019

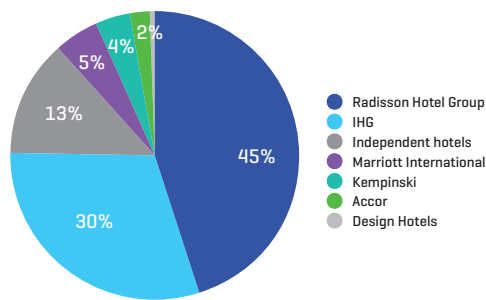


The occupancy rate of conference halls in Vilnius amounted in 2019 to 21.1%, which means the increase by 4.1% with reference to 2018

Occupancy rate by hotel chain

In 2019, the facilities of Radisson Hotel Group had definitely the greatest market share in Vilnius, as 45.1% of the entire available space was used. Simultaneously, for this chain it means the decline by 8.6% in comparison to 2018. Second most popular hotel chain - IHG, in 2019 reported the occupancy rate of 30.4%, which means the rise of 11.1%. Independent hotels also reported a rise - by 0.3% from the level of 13.1% to 13.4% in 2019.

2019



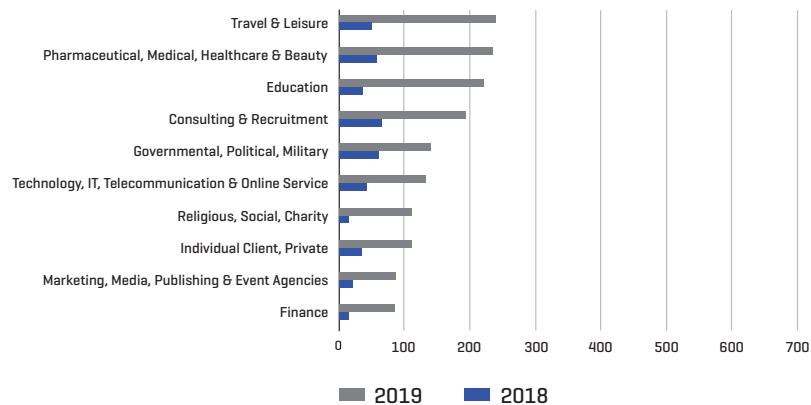
Trends by days of the week

With regard to the number of events on particular days of the week, in 2019 most of them occurred on Thursdays - an increase by 47.1% in terms of 2018, Wednesdays - a growth of 40.1% with reference to 2018 and on Tuesdays - a rise of 39.7%. The highest occupancy rate was observed on Thursdays - the increase by 4.9% to the level of 27.8% and on Wednesdays - the increase by 2.3% to 26.1%.

Sectors

Almost each sector meeting in Vilnius reported an increase in the number of organized events - including the most active - education and training sector - an increase by 44.4%, pharmaceutical - an increase by 58.7%, as well as consulting - a growth by 5%. The most active company in Vilnius organized 71 meetings in 2019, achieving 2.3% market share.

10 most active sectors in Vilnius - 2018 vs. 2019

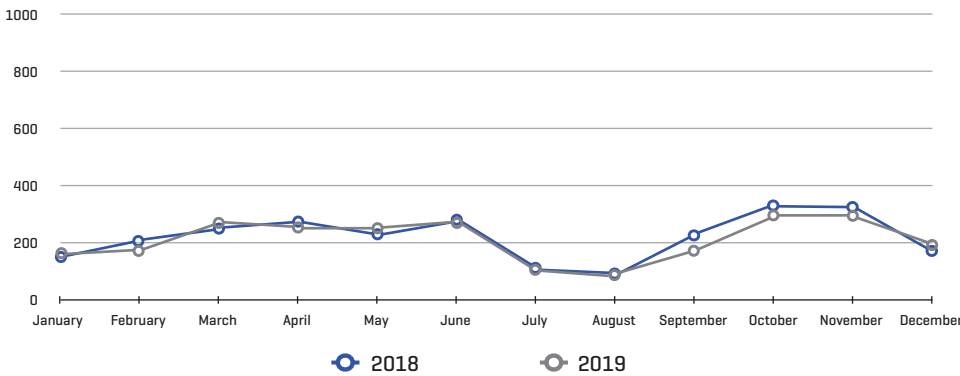


PRAGUE

General indicators

In Prague-located facilities surveyed by the Demand Outlook system, 5.4% fewer events took place in 2019 than in 2018. In 2019, most meetings took place in October, whereas in 2018 it was November.

Praga - the number of events per month 2018 vs. 2019

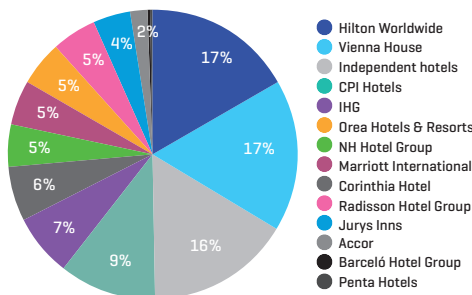


In the capital of Czech Republic in 2019, the occupancy rate amounted to 6%, which means a drop by 1.7% with reference to 2018.

Occupancy rate by hotel chain

In 2019, Hilton Worldwide hotel chain facilities had by far the greatest market share. They reported the occupancy rate of 15.5% of the entire available space, which simultaneously means the decrease by 5.1% in comparison to 2018. The second most popular hotel chain was Vienna House, in which the occupancy rate amounted to 16.8% in 2019, which means 1% increase. Independent hotels also reported a rise - by 5.3% from the level of 10.9% in 2018 to 16.2% in 2019.

2019



In the capital of Czech Republic in 2019, the occupancy rate amounted to **6%**, which means a **drop by 1.7%** with reference to 2018.

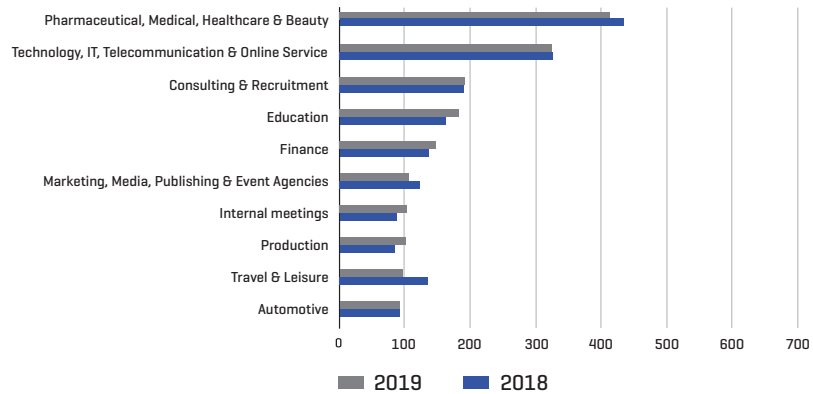
Trends by days of the week

In 2019, most meetings took place on Tuesdays; here, there was a growth of 5.2% with reference to 2018, on Wednesdays, the decline by 5.3% in comparison to 2018 as well as on Thursdays - the drop by 17.8%. The largest occupancy rate in 2019 was reported on Tuesdays - 8% the drop of 2% in terms of 2018 and on Wednesdays - 7.6% - which is the decline of 4.2% with reference to the preceding year.

Sectors

The leading sector in Prague, the pharmaceutical, reported a decline in the number of events - by 6.3%. The second most active sector - IT/technological, showed an increase by 12.5%. The consulting sector marked a loss by 5.3%, whereas the educational sector - the drop by 23%. The most active company in Prague organized 31 meetings in 2019, achieving 1.2% market share.

10 most active sectors in Prague - 2018 vs. 2019



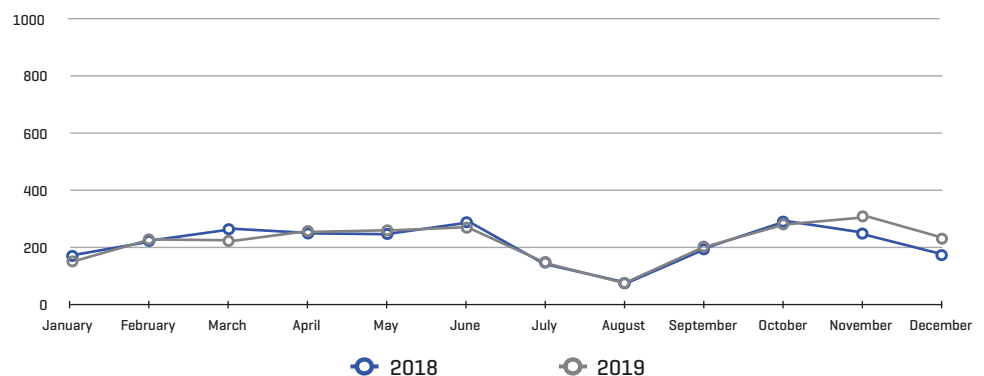
SOFIA

Independent hotels had greatest market share in Sofia, **31.2%**

General indicators

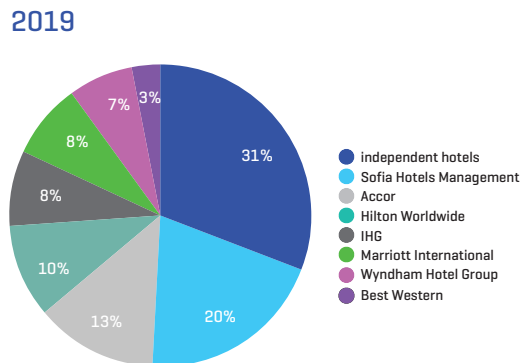
In 2019, in the monitored facilities in Sofia, there were 3.2% events fewer in 2019 than in 2018. In 2019, most meetings took place in November, whereas in 2018 it was June.

Sofia - the number of events per month 2018 vs. 2019



Occupancy rate by hotel chain

In 2019, independent hotels had by far the greatest market share in Sofia, as 31.2% of their entire available space was used, which simultaneously means the drop by 4.5% compared to 2018. The most popular hotel chain is Sofia Hotels Management, in which the occupancy rate amounted to 20,1% in 2019, which means a drop by 3.1%. The Accor hotel chain reported the occupancy rate of 12.9%, which is the same as in 2018.



Trends by days of the week

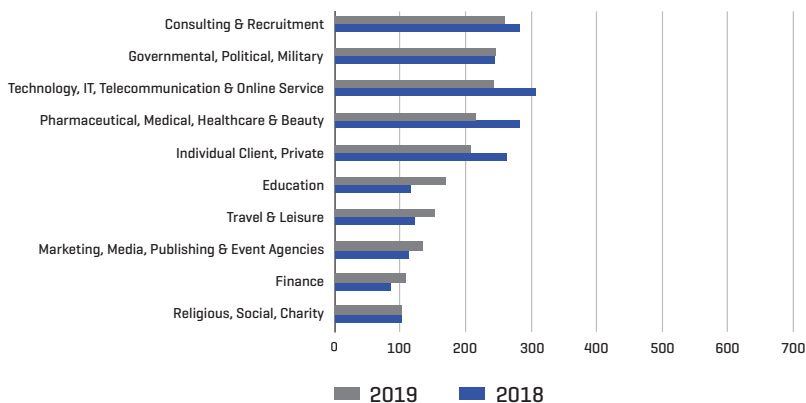
With regard to the number of events on particular days of the week, in 2019 most of them occurred in Sofia on Thursdays - an increase by 10.5% in terms of 2018, on Wednesdays - a growth by 9.1% with reference to 2018 and on Tuesdays - a drop of 2.8%. The highest occupancy rate was observed on Thursdays - 16.7%, which is a drop of 0.9% and on Wednesdays - 15.2% - a decrease by 1.5%.

Sectors

The strongest industry in Sofia in 2019 was the consulting sector, which reported a slight decline of 0.4% in comparison to 2018. The next sector - technological - showed an improvement of 1.2%. The third most active sector was the pharmaceutical branch, which according to the data accumulated by Demand Outlook reported a fall by 3.7%.

The most active company in Budapest organized 54 meetings in 2019, achieving 2.1% market share.

10 most active sectors in Sofia - 2018 vs. 2019



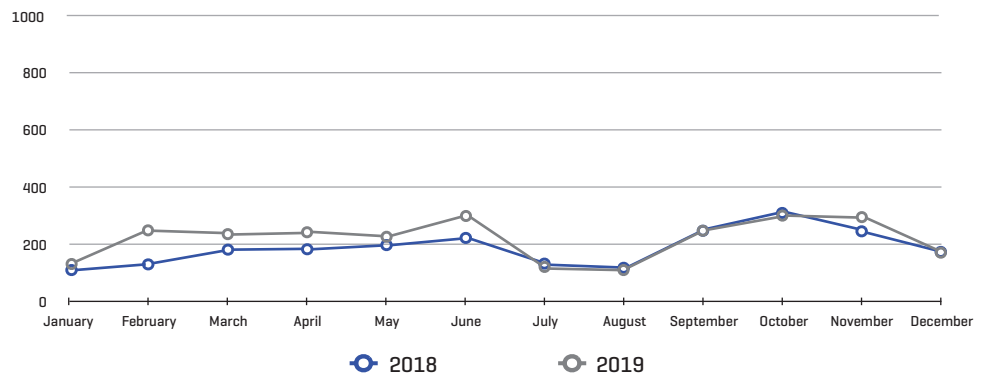
BRATISLAVA

The percentage of available conference halls used in the year in Bratislava, amounted to **16.1%** in 2019, which means a **fall by 0.5%** with reference to 2018.

General indicators

In the facilities monitored by Demand Outlook in Bratislava, there were 13% more events in 2019 than in 2018. In 2019, most meetings took place in June, whereas in 2018 it was October.

Bratislava - the number of events per month 2018 vs. 2019

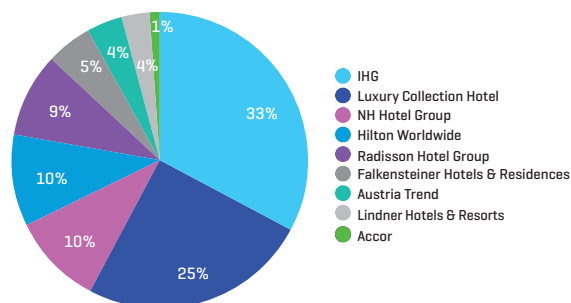


Conference hall occupancy rate - i.e. the percentage of available conference halls used in the year in Bratislava, amounted to 16.1% in 2019, which means a fall by 0.5% with reference to 2018.

Occupancy rate by hotel chain

In 2019, the IHG Group facilities had the greatest market share in Bratislava. They used 33.7% of the entire available space, which means they reported the increase by 3.9% in comparison to 2018. The second most popular hotel chain was Luxury Collection Hotel, in which the occupancy rate amounted to 24.8% in 2019, which means a drop by 4.9%. Hilton Worldwide also reported a decline - by 8.2% from the level of 10.1%.

2019



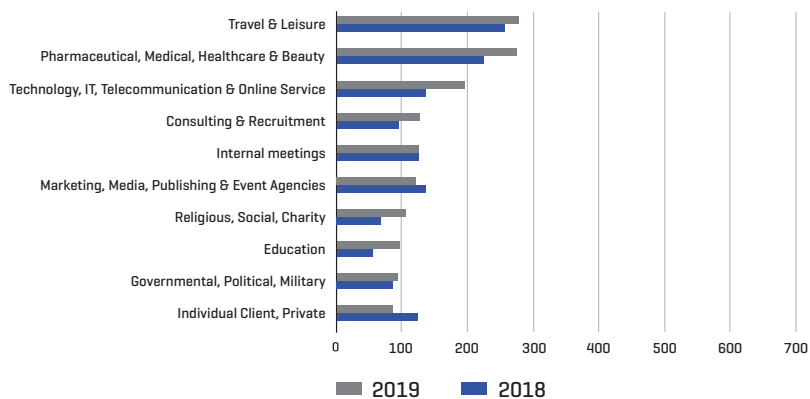
Trends by days of the week

In terms of events occurring on particular days of the week in 2019, most of them took place on Thursdays - an increase by 18.6% with reference to 2018, on Wednesdays - a rise by 12.4% comparing to 2018 and on Tuesdays - the drop by 19.2%. The highest occupancy rate in 2019 was observed on Thursdays - 21.3%.

Sectors

IT / technology - the most active sector in Bratislava - realized exactly as many meetings in 2019 as the year before. The next one - pharmaceutical - reported only a slight increase, by 0.7%, and the tourism sector showed an increase by as much as 26%. The most active company in Bratislava organized 35 meetings in 2019, achieving 1.3% market share.

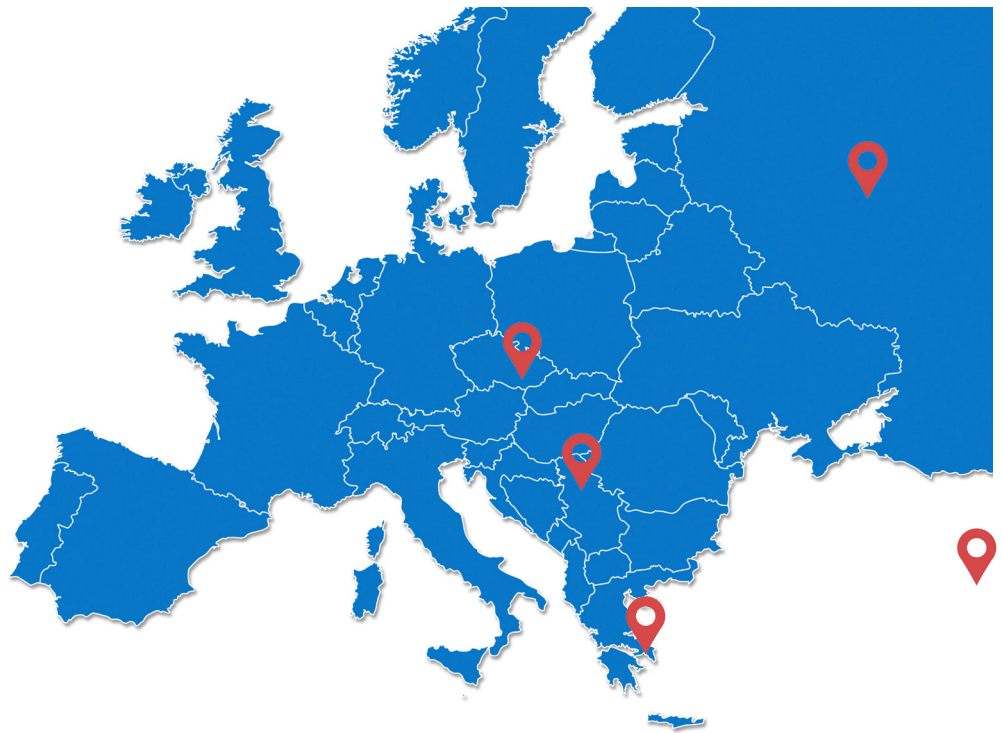
10 most active sectors in Bratislava - 2018 vs. 2019



SELECTED CITIES IN CENTRAL AND EASTERN EUROPE DATA ANALYSIS FOR 2019

Introduction and Methodology

For the selected cities of Central and Eastern Europe presented in the analysis, such as Baku, Brno, Moscow, Belgrade, Athens, for 2019 the data was accumulated concerning 14,837 meetings organized on 4m m² of conference and catering space.



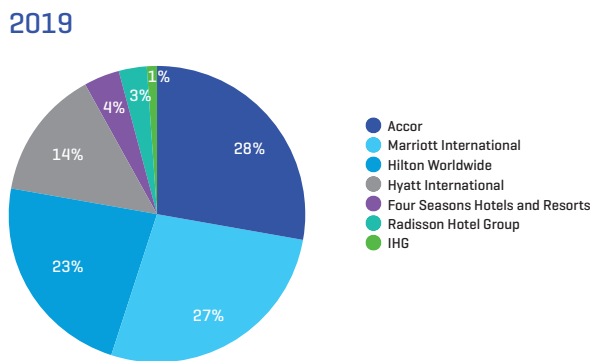
BAKU

General indicators

In 2019 in Baku, the average occupancy rate of available conference and catering space amounted to 8.5%, while the conference hall occupancy rate - i.e. the percentage rate of its use during the year - amounted to 7.8%.

Occupancy rate by hotel chain

The most available conference space was used in Baku by facilities of Accor - 27.8%, Marriott International - 27.2% and Hilton Worldwide - 22.8%.



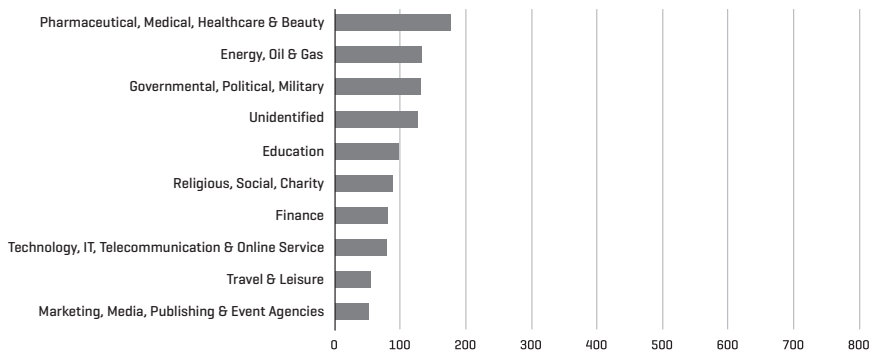
Trends by days of the week

During the year, meetings in Baku were most often organized in December and in October. The most popular days of the week were Fridays, when on average 355 meetings were organized.

Sectors

The most active sectors in 2019 were the pharmaceutical sector - 178 meetings, energy sector - 133 meetings and government/military sector - 132 events.

10 most active sectors in Baku for 2019



The most active company in Baku organized 64 meetings in 2019, achieving 4.7% market share.

BRNO

The most active company in Brno organized **21 meetings** in 2019, achieving **3.3% market share**.

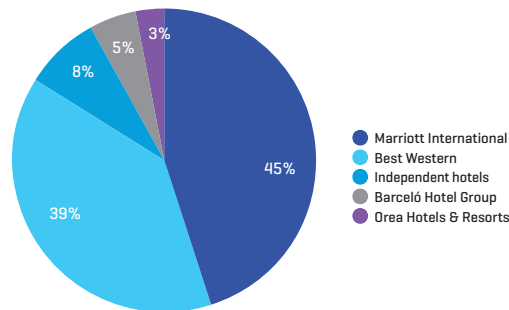
General indicators

According to Demand Outlook, in 2019 in Brno the average occupancy rate of the entire available conference and catering space amounted to 8.1%, whereas the occupancy rate of conference halls - i.e. the percentage rate of their use during the year - amounted to 8.1%.

Occupancy rate by hotel chain

The most available conference space was used in Brno by facilities of Marriott International - 44.6%, Best Western - 39.4% and independent hotels - 8%.

2019



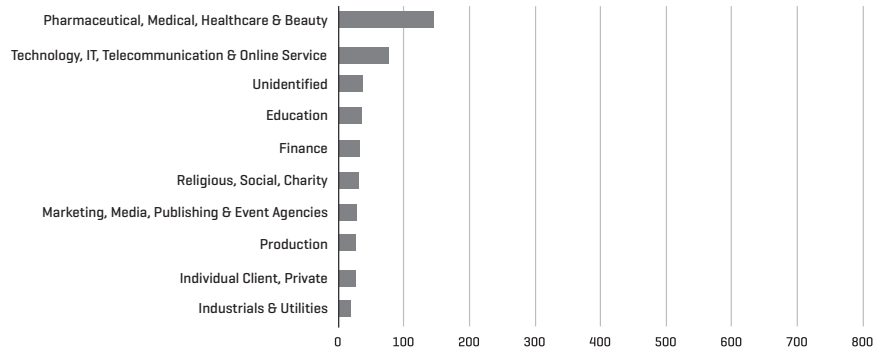
Trends by days of the week

During the year, meetings in Brno were most often organized in November and in December. The most popular days of the week were Thursdays - an average of 2,914 meetings.

Sectors

The most active industries in 2019 included the pharmaceutical sector - 1,837 meetings, IT/technological - 719 meetings and the sector of education - 483 events.

10 most active sectors in Brno for 2019



The most active company in Brno organized 21 meetings in 2019, achieving 3.3% market share.

MOSCOW

General indicators

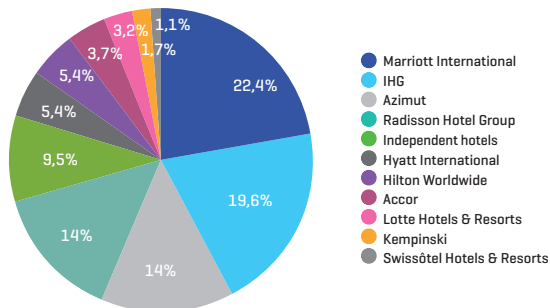
In 2019 in Moscow, the average occupancy rate of the entire available conference and catering space amounted to 11.2%, whereas the occupancy rate of conference halls - i.e. the percentage rate of their use during the year - amounted to 8.9%.

Occupancy rate by hotel chain

The most available conference space was used in Baku by facilities of Marriott International - 22.4%, IHG - 19.4% and facilities belonging to the Azimut hotel chain - 14%.

The most active company in Moscow organized **58 meetings** in 2019, achieving **0.7% market share**.

2019



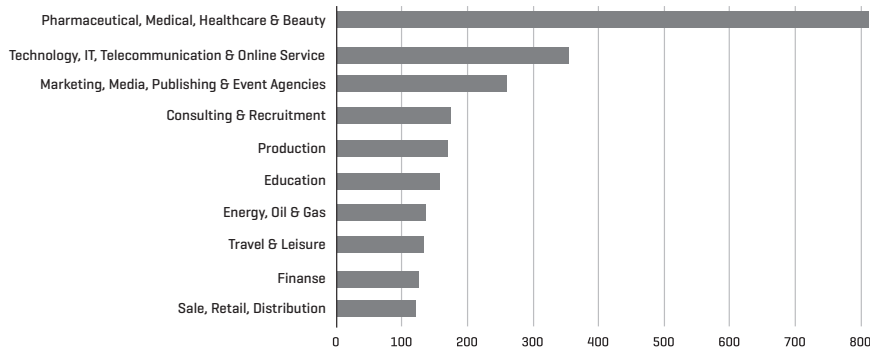
Trends by days of the week

During the year, meetings in Moscow were most often organized in November and in December. The most popular days of the week were Thursdays - an average of 2,914 meetings.

Sectors

The most active industries in 2019 included the pharmaceutical sector - 1,837 meetings, IT/technological - 719 meetings and the sector of education - 483 events.

10 most active sectors in Moscow for 2019



The most active company in Moscow organized 58 meetings in 2019, achieving 0.7% market share.

BELGRADE

The most active company in Belgrade organized **21 meetings** in 2019, achieving **1.3% market share**.

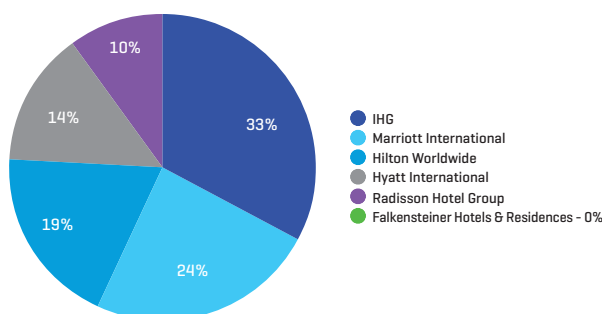
General indicators

In 2019 in Belgrade, the average occupancy rate of the entire available conference and catering space amounted to 22.2%, whereas the occupancy rate of conference halls - i.e. the percentage rate of their use during the year - amounted to 19.2%.

Occupancy rate by hotel chain

The most available conference space was used in Belgrade by facilities of IHG hotel chain - 32.9%, Marriott International - 24.2% and facilities belonging to Hilton Worldwide - 19.5%.

2019



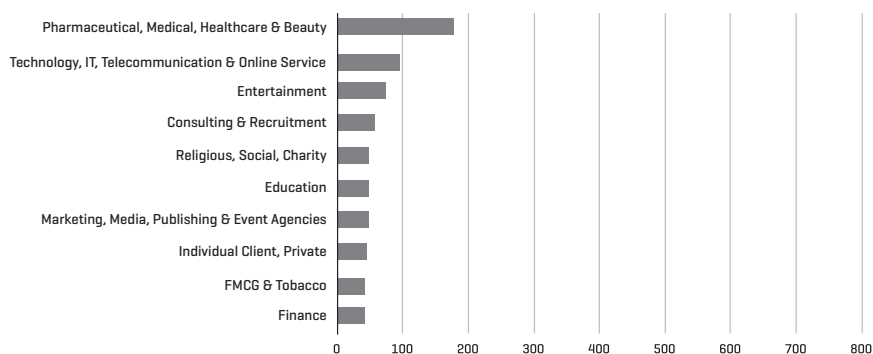
Trends by days of the week

In terms of the whole year, in Belgrade the meetings were most often organized in October and in November. The most popular days of the week were Thursdays - an average of 524 meetings.

Sectors

The most active sectors in 2019 were the pharmaceutical sector - 293 meetings, IT/technology - 194 meetings and the meetings of government/military sector - 132 events.

10 most active sectors in Belgrade for 2019



The most active company in Belgrade organized 21 meetings in 2019, achieving 1.3% market share.

ATHENS

General indicators

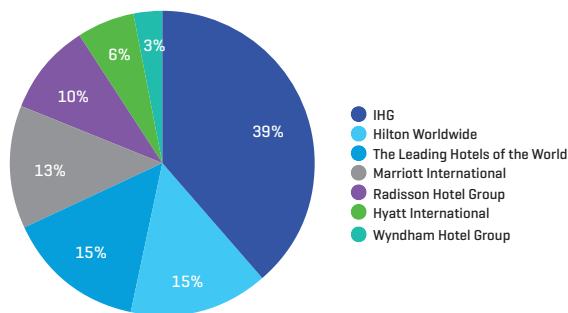
In 2019 in Athens, the average occupancy rate of the entire available conference and catering space amounted to 11.5%, whereas the occupancy rate of conference halls - i.e. the percentage rate of their use during the year - amounted to 14%.

Occupancy rate by hotel chain

The most available conference space was used in Athens by facilities of IHG hotel chain - 38.6%, Hilton Worldwide - 15.1% and The Leading Hotels of the World - 15%.

Two most active companies in Athens organized **33 meetings** in 2019 each, achieving **1.5% market share**.

2019



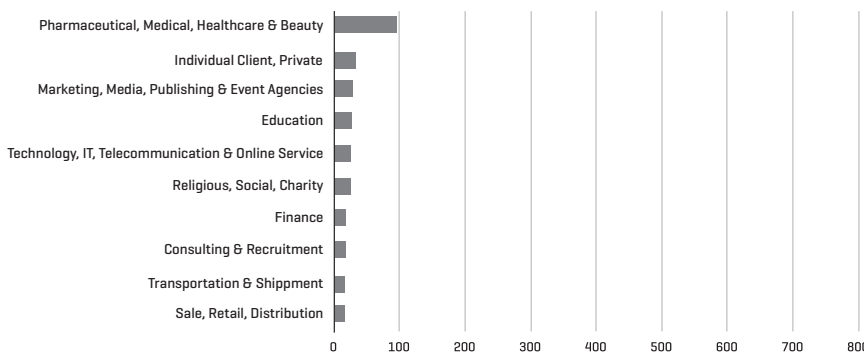
Trends by days of the week

The meetings in Baku last year were most often organized in February and in October. The most popular days of the week were Thursdays - an average of 695 meetings.

Sectors

The most active industries in 2019 included the pharmaceutical sector - 343 meetings, the sector of education - 177 meetings and the IT/technological sector - 176 events.

10 most active sectors in Athens for 2019



Two most active sectors in Athens organized 33 meetings in 2019 each, achieving 1.5% market share.

SELECTED CITIES IN POLAND COMPARATIVE ANALYSIS 2019 vs 2018

Introduction and Methodology

For the selected cities in Poland presented in the comparative analysis in this report - Warsaw, Wrocław, Cracow, the Silesian Agglomeration, Tricity, Poznań, Łódź and Lublin - this report presents data accumulated in 2019 about 42,349 events organized on 7.8m m² of conference and catering space, compared with the 2018 data about 40,902 meetings, organized on 8.6m m² of space.



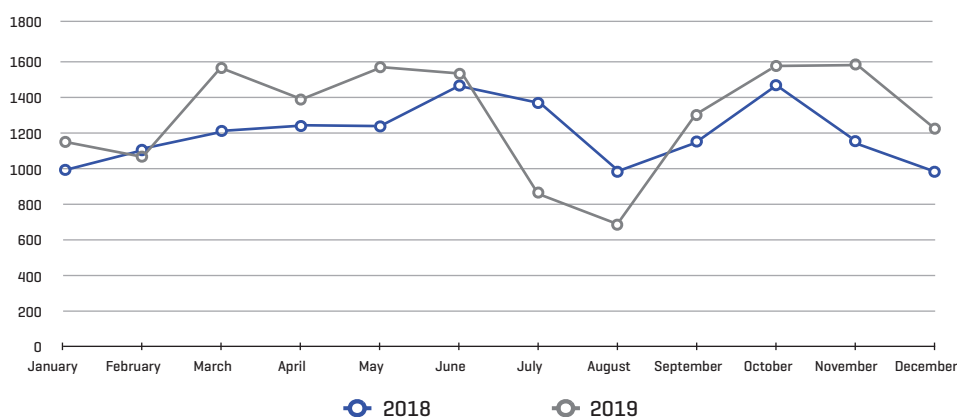
WARSAW

General indicators

According to the data accumulated by the Demand Outlook system in 2019, there were 14.7% more events in Warsaw in 2019 than in 2018. In 2019, most meetings took place in November, whereas in 2018 it was October.

The occupancy rate of conference hall in Warsaw in 2019 amounted to **15.7%**, which means an **increase of 1.6%** with reference to 2018.

Warsaw - the number of events per month 2018 vs. 2019

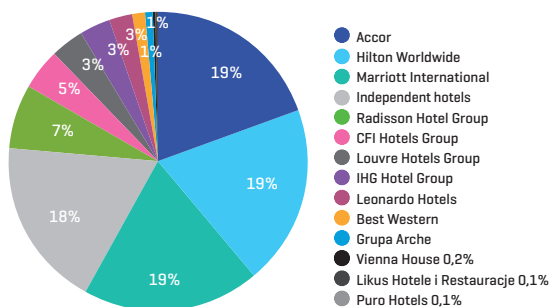


The occupancy rate of conference hall in Warsaw in 2019 amounted to 15.7%, which means an increase of 1.6% with reference to 2018.

Occupancy rate by hotel chain

In 2019, the Accor hotel chain facilities had the greatest market share in Warsaw. They used 19.5% of the entire available space, which means, however, they reported a drop of 6% in comparison to 2018. Hilton Worldwide proved to be equally popular 2019, as it also reported the occupancy rate of 19.5% - which is a decline of 0.7%. Marriott International showed the available space use amounting to 19.1%, hence reporting an increase of 2% compared to the previous year.

2019



Trends by days of the week

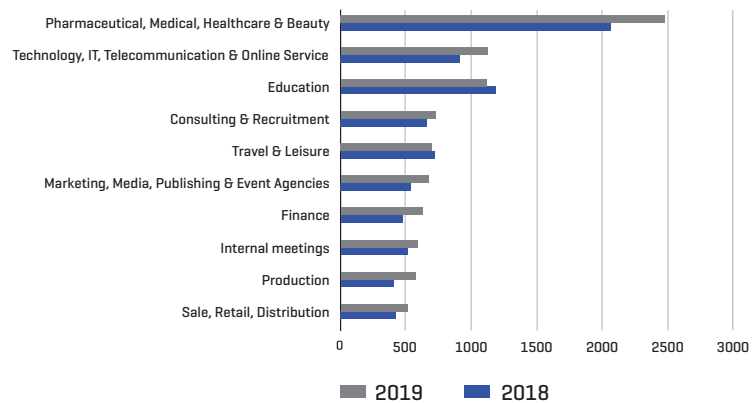
With reference to the number of events on particular days of the week in 2019, most of them took place on Tuesdays - an increase of 19.7% in terms of 2018, Wednesdays - an increase of 16.7% compared to 2018 and on Thursdays - an increase of 19.2%. The greatest occupancy rate was observed on Thursdays - 21.7%, but Wednesdays - 21.4% as well as Tuesdays - 21.3%, reported a similar rate.

Sectors

Most of the sectors present on the market in Warsaw reported an increase in the number of events. The most active sector - the pharmaceutical - showed an increase of 19.5%, IT/technology sector organized an increase of 13.4%, and the sector of education reported an increase of 33.7%.

The most active company in Warsaw organized 125 meetings in 2019, achieving 0.81% market share.

10 most active sectors in Warsaw - 2018 vs. 2019

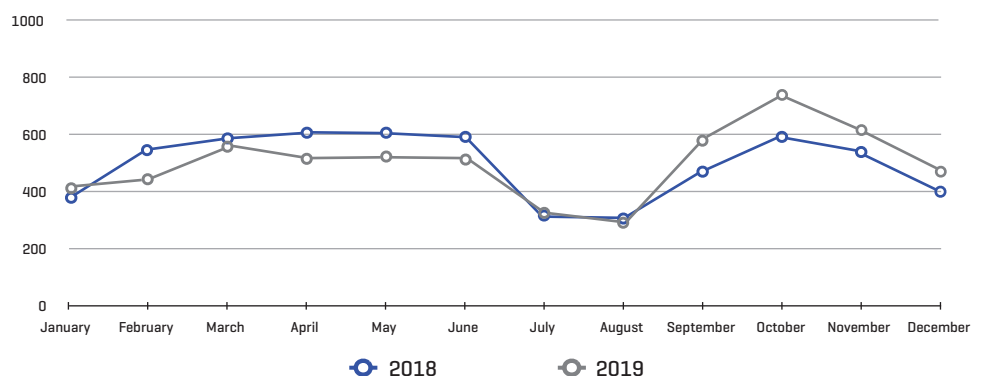


WROCLAW

General indicators

In monitored facilities in Wrocław, 0.7% more events took place in 2019 than in the preceding year. In 2019, most meetings took place in May, whereas in 2018 it was October.

Wrocław - the number of events per month 2018 vs. 2019



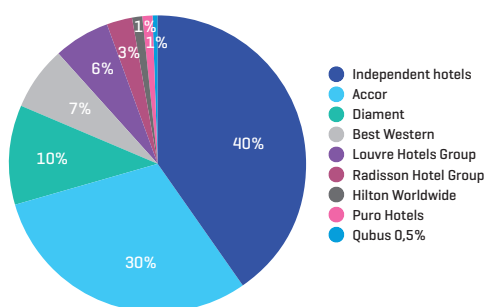
We Wrocławiu największy udział w rynku miały w 2019 roku independent hotels - **40,4%**.

In Wrocław, conference hall occupancy rate - i.e. the percentage of available conference halls sold in the year, amounted to 16.9% in 2019, which means a fall by 1.6% with reference to 2018.

Occupancy rate by hotel chain

In the capital of Lower Silesia, the greatest share in 2019 was reported by independent hotels, in which 40.4% of the entire available space was used - which is a decrease of 3.7% in comparison to 2018. The most popular hotel chain was Accor, which in 2019 reported the occupancy rate of 30.2%, which means the rise of 2.5%. The Diament hotel chain also noted a rise - of 3.8% to the level of 10.9%.

2019



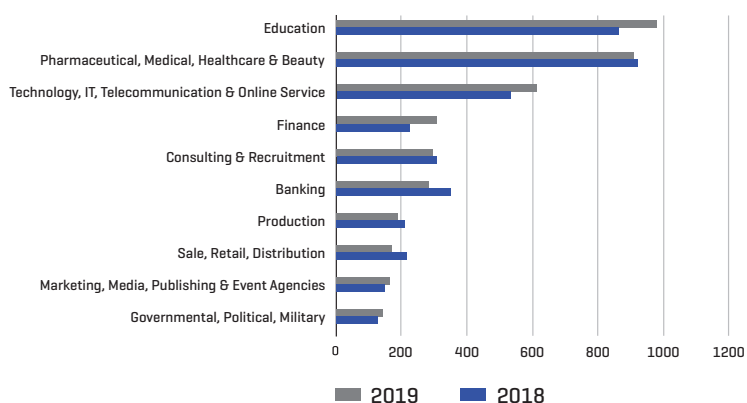
Trends by days of the week

The greatest number of events in Wrocław in 2019 took place on Tuesdays - an increase of 3.9% with reference to 2018, on Thursdays - an increase of 0.4% and on Wednesdays - a decline of 0.9%. The highest occupancy rate in Wrocław in 2019 was observed on Thursdays - 22.5% and on Wednesdays 21.6%.

Sectors

The most active sector in Wrocław - the sector of education - showed an increase in organized events by 6.5%. The next sector - pharmaceutical - realized 5.1% more meetings than the year before, whereas IT/technological sector organized 13.3% more meetings than in 2018. The most active company in Wrocław organized 147 meetings in 2019, achieving 2.5% market share.

10 most active sectors in Wrocław - 2018 vs. 2019



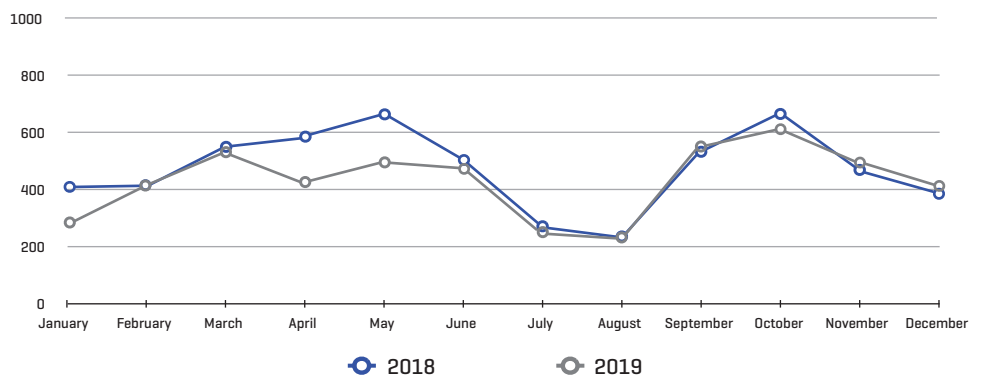
CRACOW

Independent hotels had the greatest share of Cracow meetings market **30.1%**

General indicators

According to the accumulated data, there were 8.7% fewer events organized in Cracow in 2019 than in 2018. In 2019, most meetings took place in October, whereas May was the leading month in 2018.

Kraków - the number of events per month 2018 vs. 2019

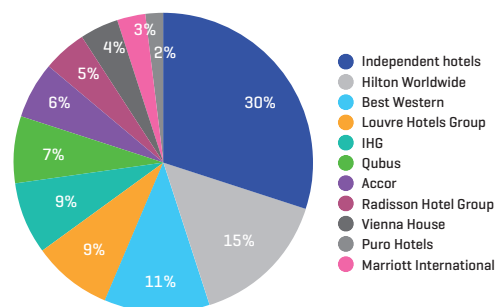


In Cracow in 2019, the conference hall occupancy rate - i.e. the percentage rate of their annual use - amounted to 13.2%, which means a drop by 0.9% with reference to 2018.

Occupancy rate by hotel chain

In 2019, the independent hotels had the greatest share of Cracow meetings market, as they used 30.1% of the entire available space, therefore reporting a growth of 3.2% in comparison to 2018. The most popular hotel chain in 2019 was Hilton Worldwide, which showed the use of space of 14.9%, which is an insignificant decline of 0.1%. Best Western hotel chain showed the available space use amounting to 11.4%, hence reporting a decrease of 2.6% compared to the previous year.

2019



Trends by days of the week

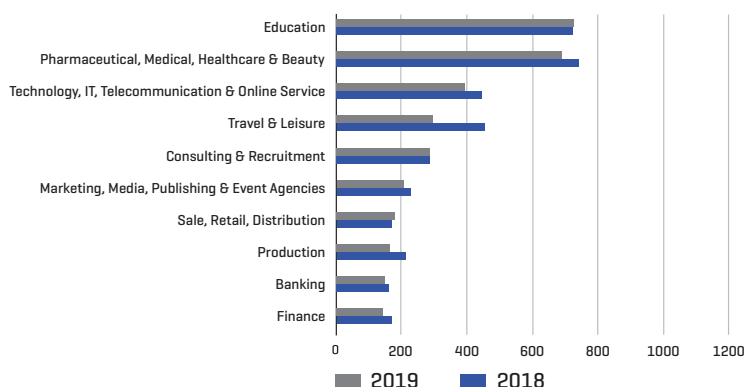
As regards the number of events on particular days of the week, in 2019 most of them took place on Wednesdays - the drop by 4.8% compared to 2018, on Thursdays - a rise of 1.7% with reference to 2018 and on Tuesdays - a slight drop of 0.5%. The highest occupancy rate in 2019 was observed on Thursdays - 15.2% and on Fridays 15.1%.

Sectors

The sector of education was the most active industry in Cracow; it organized, however, 2% fewer meetings than the year before. The pharmaceutical sector also organized fewer meetings - by 5.6% while the IT/technological sector reported a decline of 9.1%.

The most active company in Cracow organized 47 meetings in 2019, achieving 0.9% market share.

10 most active sectors in Cracow - 2018 vs. 2019



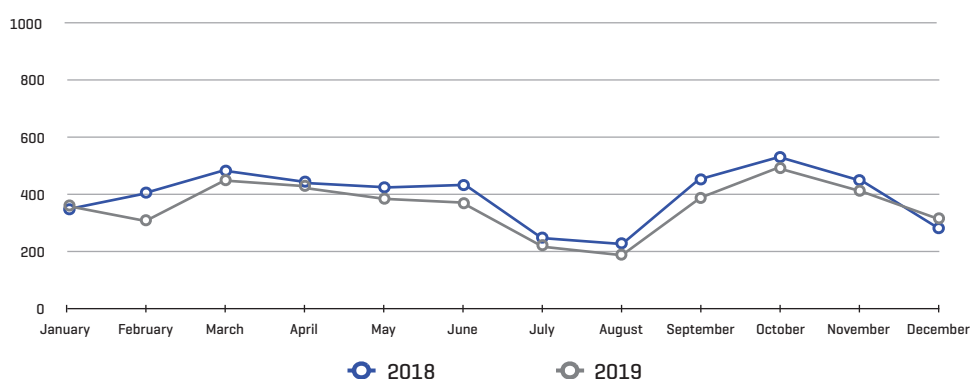
THE SILESIA AGGLOMERATION

General indicators

In facilities monitored by Demand Outlook in the Silesian Agglomeration in 2019, the number of events decreased by 5.7% in comparison to the preceding year. In 2019, most meetings took place in October - no change in comparison to 2018.

The most popular hotel chain is **Diament**, in which the occupancy rate amounted to **14.3%** in 2019

The Silesian agglomeration - the number of events per month 2018 vs. 2019

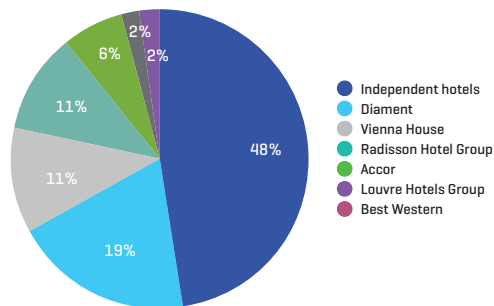


In centers taken into account in the 2019 monitoring, the conference hall occupancy rate - i.e. the percentage rate of their use during the year - amounted to 18.3%, which means a drop by 6.8% with reference to 2018.

Occupancy rate by hotel chain

Independent hotels had by far the greatest market share in 2019, as 56.6% of the entire available space was used in them. It means a decrease by 1.4% in comparison to 2018. The most popular hotel chain is Diament, in which the occupancy rate amounted to 14.3% in 2019, which means a drop by 0.3%. Vienna House also reported a slight decrease in the Silesian Agglomeration - by 0.1% - to the level of 8.4%.

2019



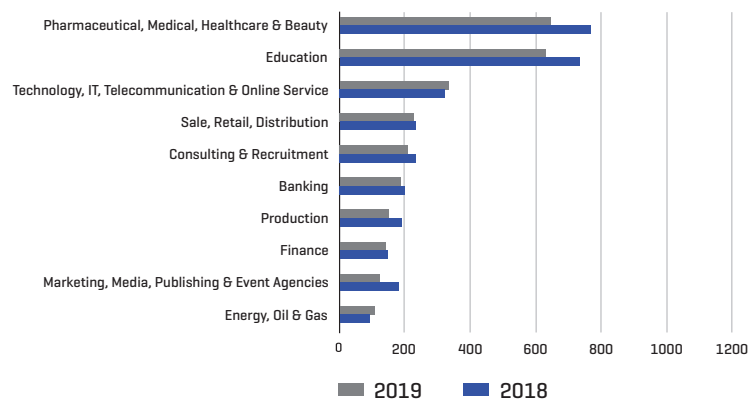
Trends by days of the week

In the Silesian Agglomeration in 2019, most events took place on Thursdays - an increase by 2% with reference to 2018, on Wednesdays - an increase of also 2% in comparison to 2018, and on Tuesdays - the drop by 3.1%. The highest occupancy rate in 2019 was observed on Thursdays - 17.5% and on Fridays 15.6%.

Sectors

The most active sector - the pharmaceutical - in the Silesian Agglomeration reported a decline in the number of events - by 15.6%, and so did the following sector - of education - by 12.7%. IT/technological sector, however, organized 12% more meetings than in 2018. The most active company organized 111 meetings in 2019, achieving 2.6% market share.

10 most active sectors in Silesian agglomeration - 2018 vs. 2019



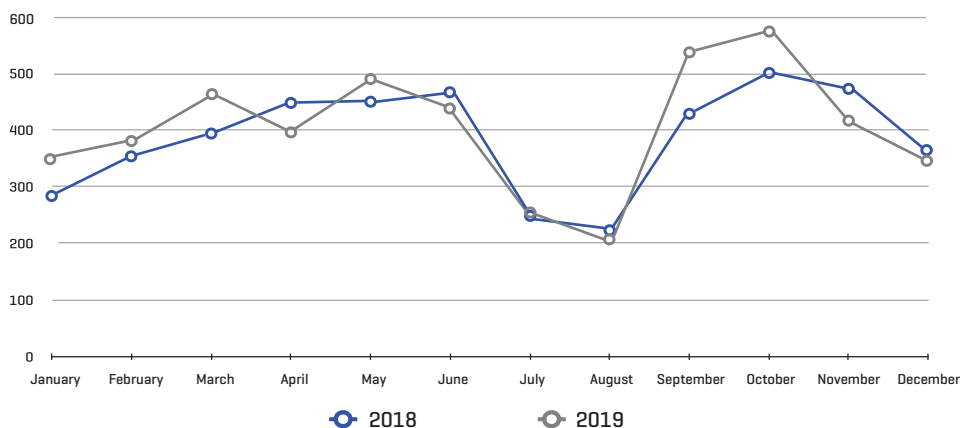
TRICITY

General indicators

According to the analyzed data, in Tricity in 2019 there were 4.6% more events than in 2018. In 2019, most meetings took place in October - which was also the case the year before.

The most popular hotel chain in 2019 was **Accor**, which showed the use of space of **25.5%**, which is a growth of **4%**

Tricity - number of events per month 2018 vs. 2019

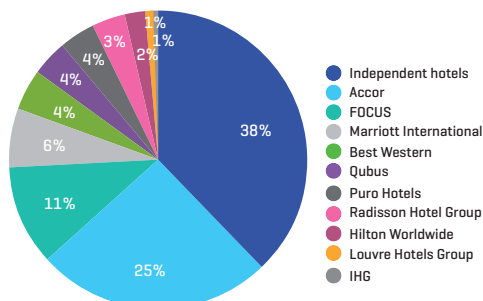


The occupancy rate of conference halls amounted in 2019 to 14.1%, which means the increase of 0.1% with reference to 2018.

Occupancy rate by hotel chain

In the meetings market in Tricity in 2019, the independent hotels had the greatest market share, as 37.9% of their entire available space was used, therefore reporting a decline of 0.9% in comparison to 2018. The most popular hotel chain in 2019 was Accor, which showed the use of space of 25.5%, which is a growth of 4%. The Focus hotel chain reported the occupancy rate of 11.1% and reported the drop of 0.7% in comparison to the year before.

2019



Trends by days of the week

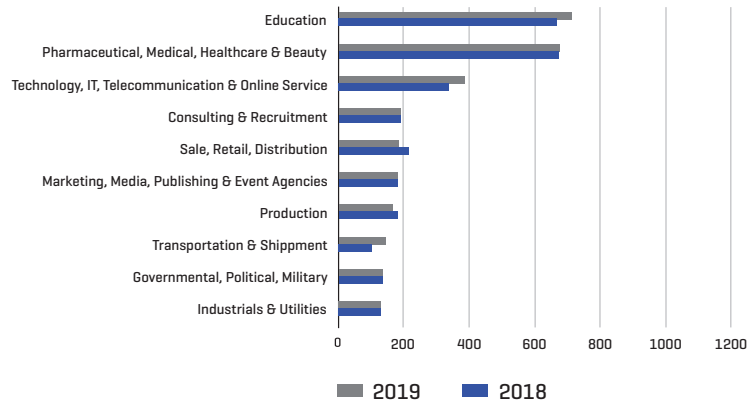
As regards the number of events on particular days of the week, in 2019 most of them took place on Wednesdays - an increase of 13.2% with reference to 2018, on Thursdays - a growth of 10.2% in comparison to 2018 and on Tuesdays - a rise of 12.4%. The highest occupancy rate in 2019 was observed on Thursdays - 11.1% and on Wednesdays - 10.7%.

Sectors

The most active sector in Tricity - the sector of education - in 2019 registered the rise in the number of meetings by 5.9%. The pharmaceutical sector organized 3.4% meetings more than the year before, whereas IT/Technological sector reported a growth of 12.3% in comparison to 2018.

The most active company in Tricity organized 54 meetings in 2019, achieving 1.1% market share.

10 most active sectors in Tricity - 2018 vs. 2019



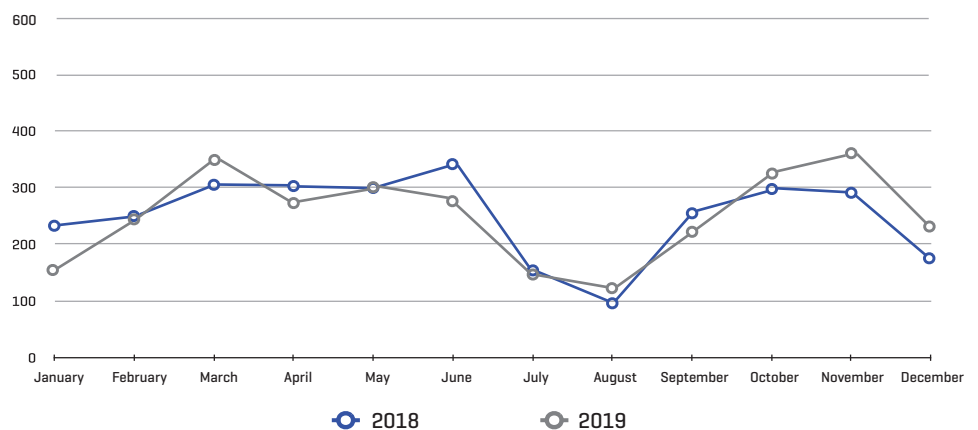
POZNAŃ

Accor hotel chain had the greatest share in the meetings market in Poznań. They used **39.6%** of the entire available space, hence reporting the growth of **0.8%**.

General indicators

According to the analyzed data, in Poznań in 2019 there were 0.6% more events than in 2018. In 2019, most meetings took place in November, whereas in 2018 June was in the lead.

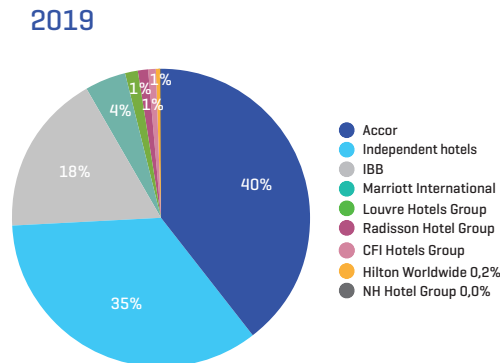
Poznań - the number of events per month 2018 vs. 2019



In Poznań in 2019, the conference hall occupancy rate amounted to 11.2%, which means a drop of 1.7% with reference to 2018.

Occupancy rate by hotel chain

In 2019, the Accor hotel chain facilities had the greatest share in the meetings market in Poznań. They used 39.6% of the entire available space, hence reporting the growth of 0.8% in comparison to 2018. The independent hotels were the runner-up, showing the occupancy rate of 34.7%, which is also a growth - by 1.6%. The IBB hotel chain reported the occupancy rate of 17.6% in the Wielkopolska region capital, and reported the drop of 2.7% in comparison to the preceding year.



Trends by days of the week

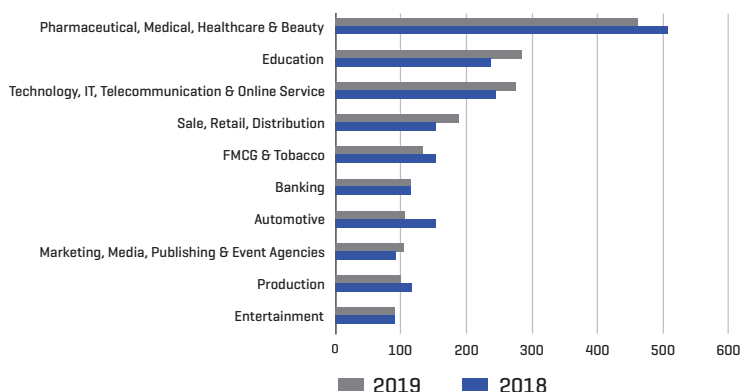
As regards the number of events on particular days of the week, in 2019 most of them took place on Wednesdays - an increase of 2% with reference to 2018, on Tuesdays - a growth of 7.5% in comparison to 2018 and on Thursdays - a rise of 0.9%. The highest occupancy rate in 2019 was observed on Wednesdays - 13.8% and on Thursdays - 13%.

Sectors

The most active sector in Poznań in 2019 was the pharmaceutical, even though it realized 9.2% fewer meetings than the year before. The educational sector had 3.6% more meetings than in 2018, whereas the following one - IT/technological sector, had 21.3% more meetings than in 2018.

The most active company in Poznań organized 65 meetings in 2019, achieving 2.18% market share.

10 most active sectors in Poznań - 2018 vs. 2019



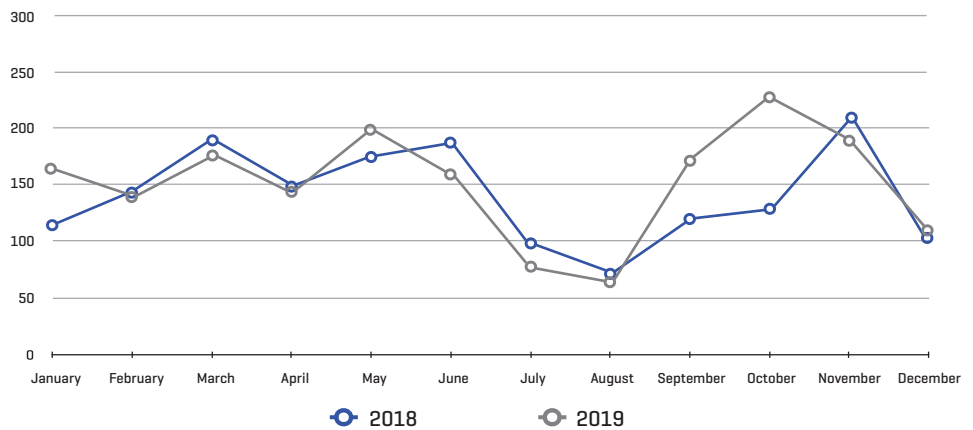
ŁÓDŹ

The most active company in Łódź organized **32 meetings** in 2019, achieving **1.8% market share**.

General indicators

According to the analyzed data, in Łódź in 2019 there were 7.7% more events than in 2018. In 2019, most meetings took place in October, whereas in 2018 it was November.

Łódź - number of events per month 2018 vs. 2019

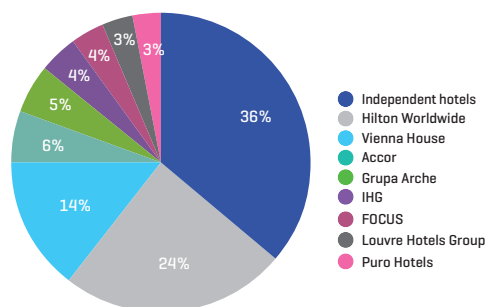


In Łódź in 2019, the conference hall occupancy rate - i.e. the percentage rate of their annual use - amounted to 11.4%, which means an increase of 1.5% with reference to 2018.

Occupancy rate by hotel chain

In 2019, the independent hotels had the greatest share of Łódź meetings market, as they used 36.3% of the entire available space, therefore reporting a growth of 2.3% in comparison to 2018. The Hilton Worldwide hotel chain facilities were the runner-up, showing the occupancy rate of 24.4%, which is also a growth - by 0.8%. The Vienna House hotel chain in Łódź reported the occupancy rate of 14.4% and reported the drop of 0.5% in comparison to the preceding year.

2019



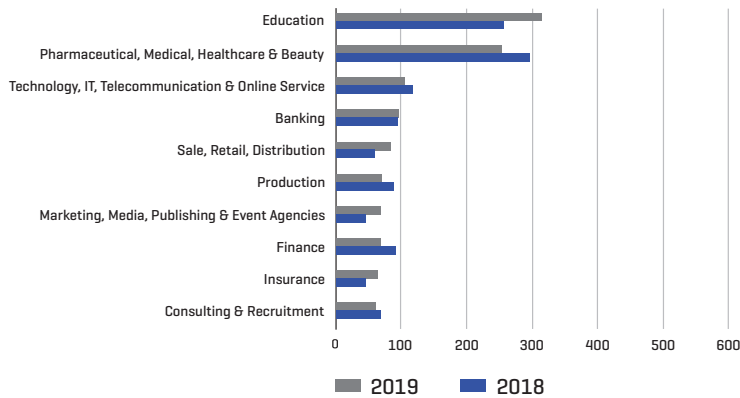
Trends by days of the week

As regards the number of events on particular days of the week, in 2019 most of them took place on Wednesdays - the drop by 5.6% compared to 2018, on Tuesdays - a rise of 6.9% with reference to 2018 and on Thursdays - a downfall by 15.8%. The highest occupancy rate in 2019 was observed on Thursdays - 4.3%.

Sectors

The most active sector in Łódź in 2019 was the educational, as it realized 8.8% more meetings than in 2018. The pharmaceutical sector had 1.3% more meetings than in 2018, whereas the following one - IT/technological sector, had 1.9% fewer meetings than in 2018. The most active company in Łódź organized 32 meetings in 2019, achieving 1.8% market share.

10 most active sectors in Łódź - 2018 vs. 2019

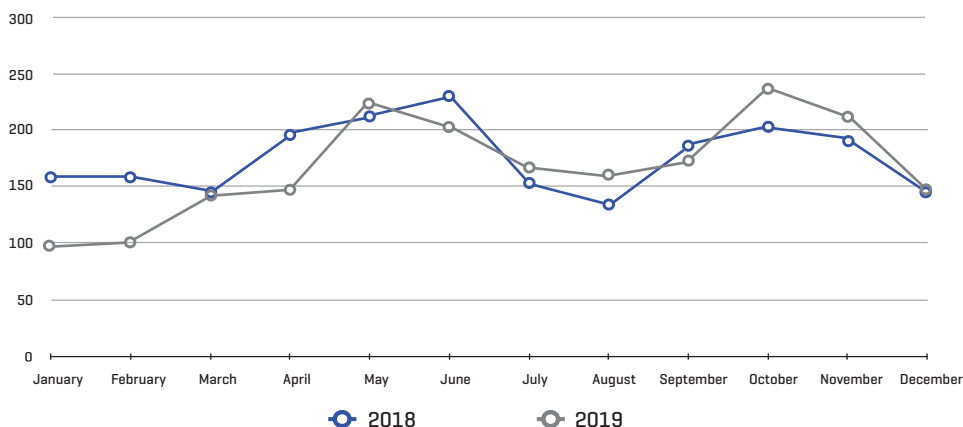


LUBLIN

General indicators

According to the data analyzed by Demand Outlook, in Lublin in 2019 there were 4.4% fewer events than in 2018. In 2019, most meetings took place in May, whereas in 2018 it was June.

Lublin - number of events per month 2018 vs. 2019

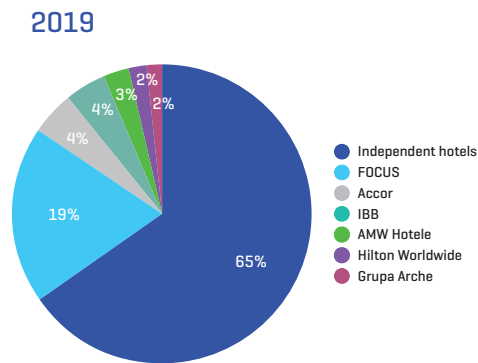


The most popular hotel chain in 2019 proved to be **Focus**, which showed the use of space of **19.3%**, which is a **decline by 5.6%**

The conference hall occupancy rate amounted to 5.5% in 2019, which means a drop by 0.6% with reference to 2018.

Occupancy rate by hotel chain

In the meetings market in Lublin in 2019, the independent hotels had the greatest market share, in which 65.3% of the entire available space was used, therefore reporting a decline of 8.4% in comparison to 2018. The most popular hotel chain in 2019 proved to be Focus, which showed the use of space of 19.3%, which is a decline by 5.6%. The Accor hotel chain reported the occupancy rate of 4.5% and reported the drop of 1.7% in comparison to the preceding year.



Trends by days of the week

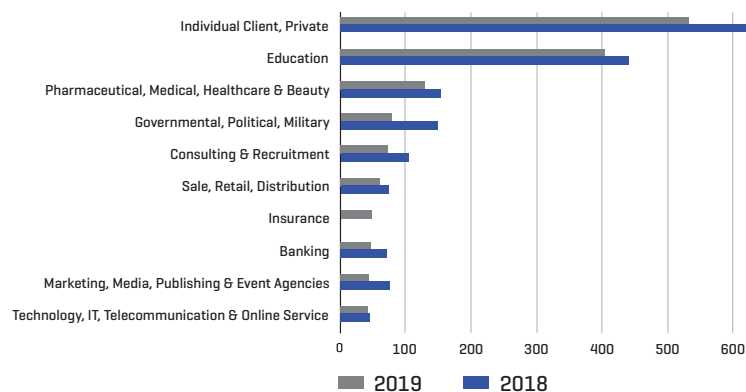
As regards the number of events on particular days of the week, in 2019 most of them took place on Fridays - an increase of 3% with reference to 2018, on Saturdays - a drop of 15.5% in comparison to 2018 and on Tuesdays - a rise of 21.7% with reference to 2018. The highest occupancy rate was observed on Thursdays - 21.5% - no change in comparison to 2018.

Sectors

The most active market segment in Lublin are private clients, even though they organized 14.4% fewer meetings in 2019 than the year before. The sector of education organized 4% meetings fewer than the year before, whereas the pharmaceutical sector reported a growth of 0.8 in comparison to 2018.

The most active company in Lublin organized 62 meetings in 2019, hence achieving 3.1% market share.

10 most active sectors in Lublinie - 2018 vs. 2019



LEGENDA:

Obłożenie – stosunek powierzchni w m² dostępnej w danym przedziale czasu do powierzchni w m² użytej w tym samym przedziale czasu

Zajętość sal konferencyjnych – procentowe wykorzystanie sal w ciągu roku

Wydarzenie – spotkanie

Branża – określa rodzaj działalności klienta/organizatora

Powierzchnia konferencyjna – powierzchnia sal konferencyjnych w m²

Powierzchnia gastronomiczna – powierzchnia sal gastronomicznych w m²

Użyta powierzchnia – wykorzystane m²

Udział – stosunek ilości wydarzeń/wykorzystanych m² dla poszczególnych segmentów/branż itp. w odniesieniu do całkowitej ilości wydarzeń/dostępnych m²

* Niniejszy raport przedstawia sytuację na rynku spotkań w Europejskich miastach, w których Demand Outlook dociera do największej liczby wydarzeń. Regularnie zwiększa się liczba monitorowanych miast i obiektów, dlatego na przestrzeni analizowanych w niniejszym raporcie lat także łączna powierzchnia konferencyjna i gastronomiczna ulegała zmianom.

Zarządzasz hotelem
lub centrum konferencyjnym?

Chcesz dowiedzieć się kto organizuje
wydarzenia w konkurencyjnych obiektach?

My posiadamy tę wiedzę.



DemandOutlook.com



Kontakt:

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

info@zfactor.pl
zfactor.pl