

Results of the Hungarian MICE market Year 2009

The Hungarian National Tourist Office has been collecting and processing data since 2001 to follow the changes and define the trends of the Hungarian meetings market. With the cooperation of more than 370 partners, an analysis of the international conferences¹ held in Hungary in 2009 is provided below.

According to the Central Statistical Office, 29% of foreigners who visited Hungary in 2009 arrived with a business reason, or to participate at a conference. In 2009, Hungary hosted 356 international conferences and 90 international fairs and exhibitions. These numbers show a 33% decrease in the number of international conferences, and a 58% increase in the number of fairs and exhibitions compared to the previous year, when 531 and 57 such events were held respectively. The following table shows changes on the Hungarian meetings market since 2002.

Table 1: International conferences in Hungary, 2002-2008

	2002	2003	2004	2005	2006	2007	2008	2009
Number of international conferences	370	351	326	340	431	485	531	356
Number of international fairs and exhibitions	22	17	23	24	29	32	57	90
Average number of participating nationalities	11	9,22	11,7	10,6	11,1	11,56	9,2	12,3
Average length of international conferences	3,6	3,1	4	4	4,5	4,3	3,9	3,3

Source: HCB

¹ Following the criteria of ICCA, the Hungarian Convention Bureau considers a meeting international where there is at least 3 different nations and 50 participants present. In addition, the HCB statistics include corporate events as well.

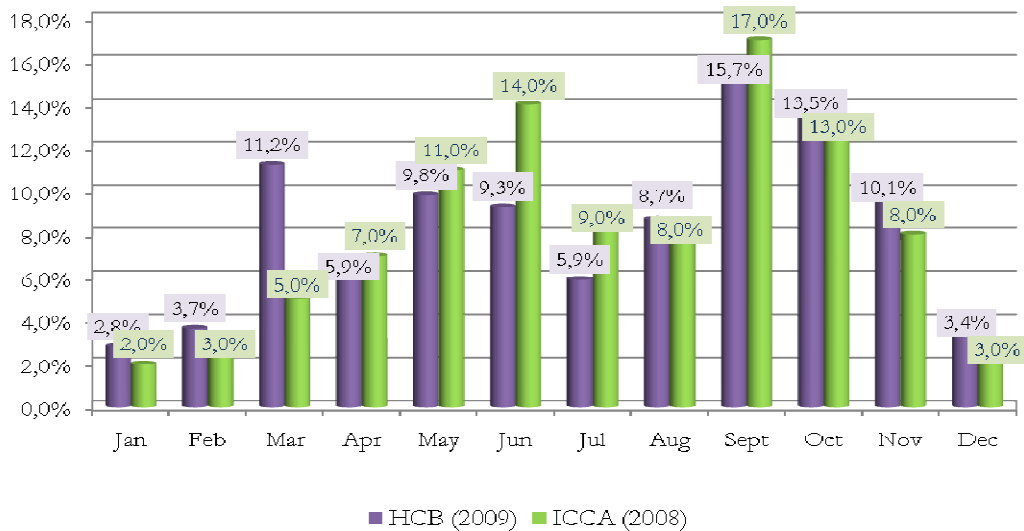
The partners of the Hungarian Convention Bureau have provided detailed information about 221 international conferences, while the Bureau's own research discovered another 135 of such events from other resources (ICCA and ULA databases, internet research). As information about these 135 conferences is not complete, they did not get included in every part of the following analysis. The spatial, temporal distribution and length of conferences were defined by using data of all 356 events.

In 2009, 373 partners of the HCB have received the statistical questionnaire. 35,9% of the respondent companies (123 conference hotels, 46 event organizers and 26 unique venues) have informed us of having organized at least one international conference during the last year. Eight venues and two PCOs have organized 6 or more international conferences.

Based on the data provided by the partners of the Hungarian Convention Bureau, the average number of participants per meeting was 230,4 in 2009, which is an increase compared to last year (225,3). Projecting this average to the total number of meetings held in the country throughout the year (356), the estimated total number of participants is more than 82.000. Counting with the average length of conferences (3,3 days), the estimated total number of days that conferences have been held in Hungary is 1174,8. This means that every day there were 3,2 international events somewhere in the country on average.

Similarly to the previous year, most of the international conferences were organized in March and September in 2009, with October getting into the top three. Each of these three months held at least 40 conferences, which together covers more than 40% of all events in 2009. The next graph shows how the temporal distribution of international conferences in Hungary in 2009 relates to the data published by ICCA for the year 2008.

Graph 1: Temporal distribution of international conferences



Source: ICCA and HCB

In contrast to the previous years, the subject of most of the international conferences in 2009 was medical, followed by economical and scientific issues. Table 2 summarizes how the percentage of different conferences fluctuated since 2002.

Table 2: Subject of international conferences, 2002-2009

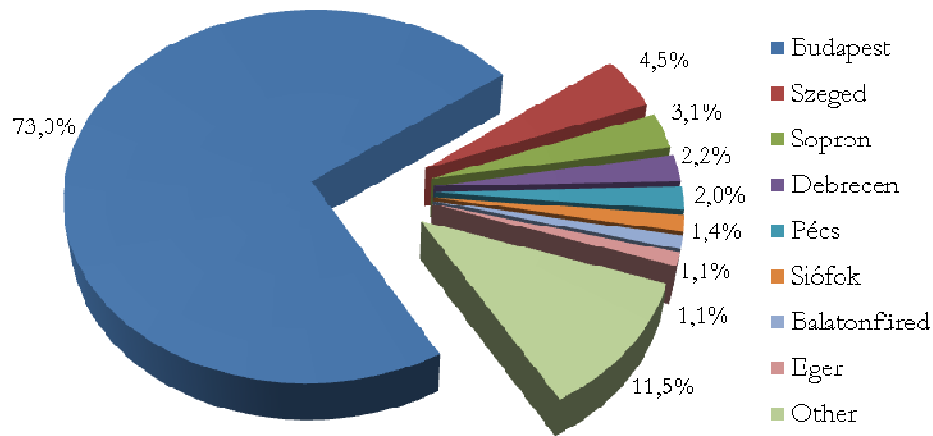
	2002	2003	2004	2005	2006	2007	2008	2009
Medical	28%	26%	21%	29%	23,1%	23,4%	21,7%	26,9%
Economy	28%	28%	26%	20%	20,5%	25,5%	24,7%	16,7%
Scientific	28%	22%	17%	24%	17,6%	19,6%	16,7%	13,2%
Transportation	4%	3%	3%	2%	3,9%	2,1%	1,6%	2,1%
IT	7%	4%	5%	11%	10,6%	6,3%	8,9%	7,3%
Tourism	5%	5%	4%	2%	1,9%	1,7%	1,4%	2,6%
Other	---	12%	24%	12%	22,4%	21,3%	25,1%	31,2%

Source: HCB

Most of the conferences (74,7%) were held in conference hotels last year. This percentage is lower than in 2008, when 77,3% of such events were held in similar facilities. Congress centers accommodated 13,1% of the international events, while universities and other scientific institutions hosted proportionally almost twice as many events this year: 8,1%, compared to 4,3% in 2008. The rest of the international conferences (4,1%) were held in other type of venues.

73,0% of international conferences in 2009 were held in Budapest. The spatial distribution of conferences in Hungary are showed on Graph 2.

Graph 2: Spatial distribution of international conferences



The average length of conferences was 3,3 days (2008: 3,9 days) in 2009. Most of the conferences (57,9%) lasted for two or three days. 22,6% of these events took four to five days, and only 8,6% of them were one day events. The percentage of six days or longer conferences fell from 22,1% in 2008 to 10,9% in 2009.

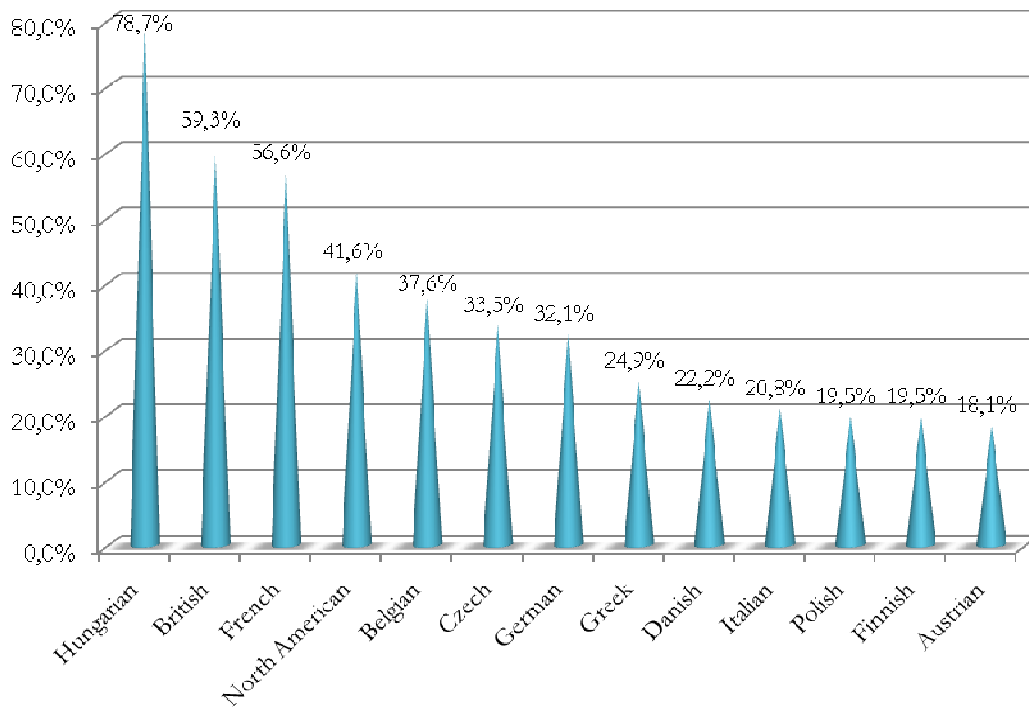
Almost half of the international conferences in 2009 (42,6%) had between 50 and 100 participants. The proportion of conferences with 101-250 participants has grown from 34,7% to 36,2% compared to 2008, and that of events with 251-500 attendees to 11,8%. 5,9% of all events were the size of 501-1000 people, and there has been 8 international conferences organized in Hungary in 2009 that had participants over a thousand people.

There has been a growth in the average number of participants per conference last year. In 2008 it was 225,3 people, while the next year it reached 230,4 persons. This is still under the European average, which is 602² participants/international meeting.

The percentage of foreign conference participants has shown a continuous increase in the last three years. In 2007, 69% of participants arrived from abroad, in 2008 76,9%, and in 2009 their proportion reached 79,1%. The average number of participating countries per international conferences was 12. The graph below lists the nations that have participated in at least 18% of these events.

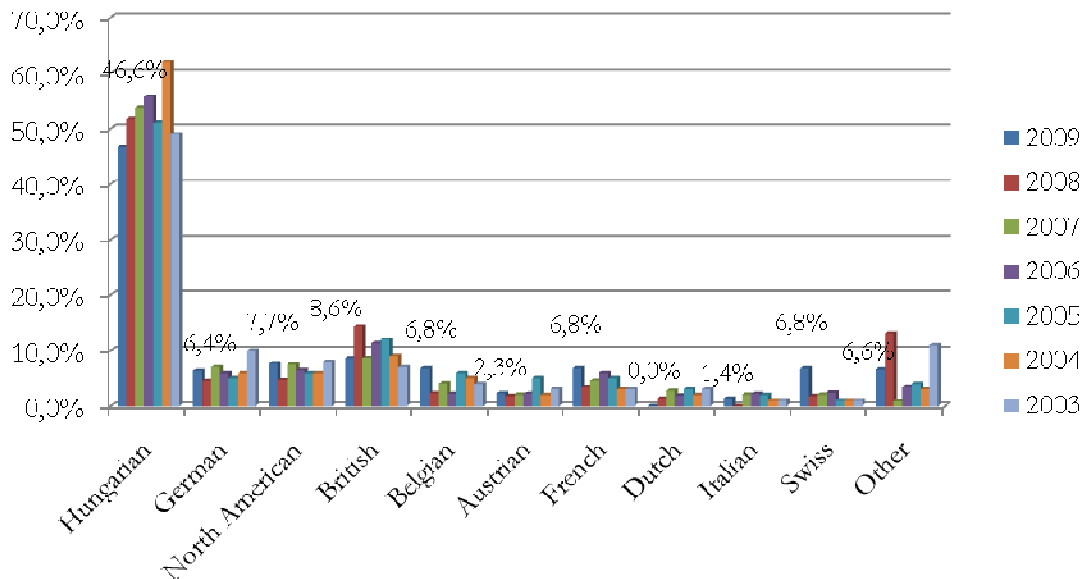
² According to ICCA, 2008

Graph 3: Nationality of participants at international conferences



Among the international conferences organized in Hungary, close to every second was ordered by a Hungarian association or company. Conferences ordered by British companies or associations have fallen compared to 2008, while North American, German, French, Belgian, Swiss, Austrian and Czech orders increased.

Table 3: Procurers of international conferences

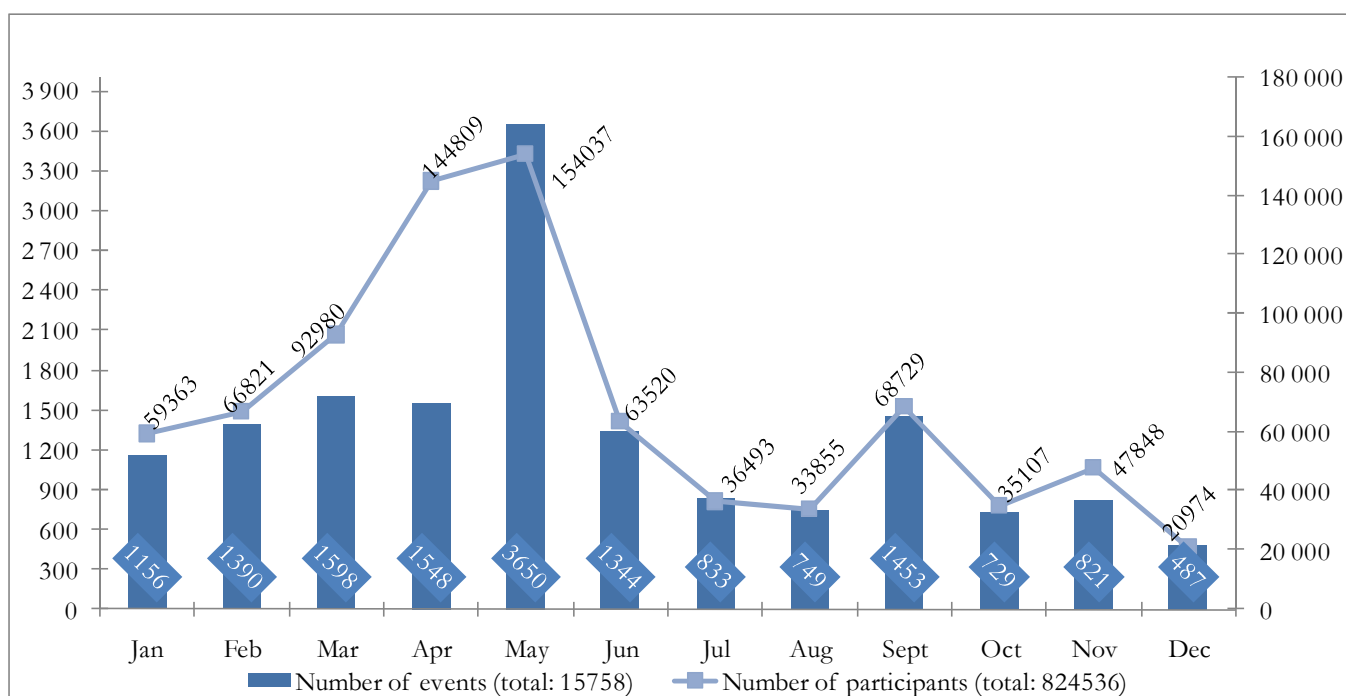


Other events

Although not included in the above analysis as they do not fit the criteria of ICCA or UIA, ‘other events’ constitute a great part of the Hungarian meetings market. ‘Other events’ are meetings, conferences that had less than 50 participants or were attended by less than 3 nationalities.

In 2009, 195 of the partners of the HCB organized 15.758 such events in total, with a total number of participants reaching over 824.000. The average number of participants of these events was 52,32 in 2009. 44,6% of these events were held in the countryside, which is a much better ratio than in the case of the international conferences.

Graph 4: Temporal distribution of ‘other’ events and number of participants



A summary of the statistical analysis can be downloaded free of charge from:

www.hcb.hu / Market Information / Statistics.

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