Meeting- & EventBarometer
Meeting- & EventBarometer
Germany 2017/18
Study of the German conference and events market
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Glossary

**Types of venues:**

EC = event centres

Event centres include conference centres, sports and multi-purpose halls as well as arenas and community centres that have been built for events and do not offer accommodation.

CH = conference hotels

Conference hotels offer both meeting spaces and accommodation.

EV = event venues

Event venues include special premises that have originally been built for purposes other than events, such as palaces/castles, museums, factories/warehouses/engine sheds, studios, leisure parks, universities/educational facilities, airports, etc.

**Types of events:**

**Business events:** meetings and events with a business background, e.g., conferences, meetings, seminars and workshops but also university events, promotional events or galas organised by companies

**International events:** events with at least 10% international participants

**Local events:** meetings of local associations and groups

**Social events:** social programmes, dinners and evening events (i.e., all events that are part of a larger, primary event such as a conference)

**Festivities:** e.g., anniversaries, banquets, weddings, company parties, parties (stand-alone events that are not related to another event)

**Sports and cultural events:** pop concerts, sports festivals, etc.

**Hybrid events:** events that simultaneously combine physical events with virtual components (e.g., web broadcasts)

**Virtual events:** entirely virtual events (e.g., web broadcasts, video telephony) without participants meeting face-to-face in the real world

**Abbreviations:**

DZT: Deutsche Zentrale für Tourismus e.V.

EVVC: Europäischer Verband der Veranstaltungs-Centren e.V.

GCB: German Convention Bureau e.V.

MEBa: Meeting- & EventBarometer (Germany study)

MICE: Meetings, Incentives, Conventions, Events

VDR: Verband Deutsches Reisemanagement e.V.
The Meeting- & EventBarometer study is carried out every year and the only one about the German events market that analyses the conference as well as the events sector.

The study was initiated by the European Association of Event Centres (EVVC), the GCB German Convention Bureau e.V. and the German Tourist Board (DZT). For the 12th time, these three partners have commissioned the European Institute for the Meetings Industry (EITW) to carry out the study.
More than 4,000 event venues with a minimum seating capacity of 100 across the whole of Germany and 8,000 organisers worldwide were questioned in an online survey in February/March 2018. The response rate of those approached was 7.1%. The supplier survey represents the volume and structure of the events market while the organiser survey reflects the current spectrum of opinions of German and international clients.

The answers by suppliers provide sufficient data for all three types of venues to make valid statements.

Organisers can be differentiated by origin (Germany, Europe, outside Europe) as well as by their form of organisation (companies, associations, agencies), which provides different views of the current meetings market. As part of the organiser survey, the member companies of the German Business Travel Association (VDR) have been contacted for the second time in 2018. This approach is reflected in the high number of responses from organisers within companies.

Please note that all data related to events and participants refers to 2017 while the forecasts refer to the current year (2018) and the future.
01 MARKET INFORMATION
Topics & Trends

TECHNOLOGICAL DEVELOPMENTS/PARTICIPANTS

Yesterday 2006 292 million

Today 2017 405 million

Tomorrow ?

Basis: EITW, supplier surveys 2018
Topics & Trends

DIGITAL TRANSFORMATION

Up to 50 participants

More than 50 participants

Basis: EITW, supplier surveys 2018
Market Information

Market overview 2017/2018

Supply side*

Demand side

*Facilities with a capacity of at least 100 seats in their biggest space when seated in rows
Basis: EITW, in-house research and supplier survey 2017, various surveys

Demand on high level with relatively stable supply
Approximately 405 million delegates – a year-on-year increase of 2.8% – attended 2.97 million meetings, conferences and events in German venues. The number of events decreased by 1.7%.
On the supply side, there are 7,405 event centres, conference hotels and event venues with a minimum seating capacity of 100 in their biggest space. This corresponds to an increase of 1.3% compared with the previous year.
On the whole, the range of venues remains on a stable level. Yearly marginal increases are spread out unevenly across the different types of venues. The strongest increase can be witnessed for event venues. They are very popular for different reasons as they, e.g., bring former industrial spaces to life or offer options for creative and distinctive events.
Market Information

Supply side: Venues

The number of venues for meetings, conferences and other events has increased by 1.3% in 2017. This growth is mainly down to the increase in event venues by 2.1% while the share of this type of venue (30% of the entire market) remains stable. In particular smaller event venues see growth. Please note that the conversion of, for instance, former industrial spaces into modern event and conference centres also leads to a growth of this type of venue as, by definition, they belong to the category of “event venues” (see p. 5). Conference hotels also keep their market share of 46%. The increase of 0.8% is mainly down to smaller conference hotels. The increase in event centres (1.1%) can be attributed to small capacity venues.

Breakdown of venues by type

Basis: EITW, in-house research 2017
At 175, the number of occupied days (event days plus move-in and move-out days) in 2017 is higher than in 2016 (170). The 40.6 move-in/move-out days equal a share of 23.2% and are therefore on a similar level as in 2014.

Breaking down the different types of venues, event centres are above average with 201 occupied days and the share of move-in/move-out days is at 27.4%. Spaces in conference hotels are on average occupied on 175 days per year and have the lowest amount of move-in/move-out days (12.7%). The occupancy rate of event venues (142 days) is much lower. However, in this context it needs to be taken into account that renting out rooms for events is of secondary importance for numerous event venues (e.g., museums, zoos). Their share of move-in/move-out days is similar to that of event centres.
**Market Information**

### Demand side: Participants

Development of participant figures from 2006 to 2017

- 2006: 292m
- 2007: 314m
- 2008: 318m
- 2009: 302m
- 2010: 338m
- 2011: 362m
- 2012: 371m
- 2013: 383m
- 2014: 393m
- 2015: 394m
- 2016: 405m

In 2017, the number of participants continues to grow.

Basis: EITW, supplier survey 2007 to 2018: total number of participants
Market Information

Demand side: Events

Development of events from 2006 to 2017

The number of physical events has declined slightly. Small events are increasingly turning into digital-only events which interrupts the previous continuous growth in the number of events.

-1.7% events compared with 2016

Basis: EITW, supplier survey 2007 to 2018: total number of events
The overall development of a 1.7% decline in events is mainly due to fewer events in small venues of all three venue types and conference hotels on the whole. The number of events is strongly affected by the decline of events in small venues as these facilities generally host the lion share of events.

Looking at the distribution by percentage, the number of events according to venue types is shifting in favour of event centres and event venues while the share of conference hotels decreases by five percentage points.

The assessment of the current booking situation in 2018 compared with 2017 further underlines the difficult times conference hotels are experiencing.
The overall growth in participants of 2.8% can mainly be attributed to large event venues as the clear winner in 2017. They generate strong growth with regard to the number of participants, thereby offsetting the weaker results of small venues and conference hotels.

This is also reflected in the distribution of participants by percentage, with event venues increasing their market share by three percentage points at the expense of event centres (-2 percentage points) and conference hotels (-1 percentage point).
Market Information

International participants

The number of international participants at events in Germany continues to grow steadily.

The increasing internationalisation of the events markets and the growing importance of events in Germany has continued in 2017. The share of international participants has now reached an average of 9%, equalling 36.5 million participants from abroad. This represents a year-on-year increase of 10.9%. During the last twelve years, the number of international event participants has therefore more than doubled (2006: 14.3 million).

Depending on venue type, the average varies and at 10.8%, is still highest in conference hotels. However, event centres are catching up and can now report an average of 8.2% in international participants (+1.9 percentage points).

Basis: EITW, supplier survey 2007 to 2018: total number of participants, thereof from abroad
Yet again, the by far most important type of event in German venues in 2017 was the “conferences, meetings, seminars” category, retaining and, in fact, even increasing its market share by 0.1 percentage points. The share of exhibitions and presentations as well as that of festivities has increased compared with the previous year.
Market Information

Types of events by venues

Event centres

Almost half of the events in event centres (46%) are conferences, meetings and seminars.

Cultural and sports events are the second most prevalent type of events.

Of all venues, event centres have the highest share of exhibitions and presentations (13.3%).

Local events are more strongly represented in event centres than in conference hotels and event venues.

Conference hotels

More than three quarters of events in conference hotels are conferences, meetings and seminars.

Festivities are the second most important type of event, followed by exhibitions and presentations.

Cultural and sports events only play a marginal role.

Event venues

Conferences, meetings and seminars have the biggest share (31%).

More than a fifth of all events in event venues are cultural and sports events.

Event venues are popular for organising festivities with a share of 19.1% (third most prevalent type of event).

Social events mainly take place in event venues, making up 12.3% of all events in this venue type.

Basis: EITW, supplier survey 2017 & 2018: number of events by different event types
Conferences, meetings and seminars with accompanying exhibition

Share of conferences, meetings and seminars with exhibition

Conferences with exhibitions are on the up.

In 2017, conferences and meetings with exhibitions had a share of 17% in German venues.

The share is highest in event centres (20.3%) and equals one fifth of meetings and conferences. At 10.8%, the share is considerably lower in conference hotels.

2015: 13%  2016: 15%  2017: 17%

Basis: EITW, supplier survey 2016-2018: How many seminar, meetings and conferences include an exhibition?
Market Information

Event types: Business events and (other) events

Breakdown of business events and (other) events

Business events include conferences, meetings and seminars as well as exhibitions and presentations. All other event categories can be summarised under the heading “events”. This simplified differentiation enables an easy overview of work-related events on the one hand and social/recreational events on the other hand in the context of the overall market and broken down to the different venue types.

The share of business events continued to grow in 2017 and is now at 66.9%.

They dominate in event centres, constituting 60.2% of all events. However, they decrease by 1.9 percentage points in comparison to 2016. Business events are particularly prevalent in conference hotels (84.2%) while in event venues, events dominate with 64.2%.

Basis: EITW, supplier survey 2010 to 2018: number of events by different event types
Organisers report that 61.3% of events include overnights which means that almost two thirds of events include overnights.

Please note that not all event participants are at the same time also overnight guests.

The information provided by conference hotels supports the figures provided by organisers. On average, 65.9% of events include overnights.

In the case of event centres and event venues, the figures provided – 23.7% and 24.5% respectively – are considerably lower. Suppliers renting out spaces to organisers very often do not have any further details about event participants (including if they spend overnights), which explains the discrepancy in figures provided by event centres/event venues and organisers for overnight stays.

Basis: EITW, supplier and organiser survey 2018: What percentage of your events included overnights?
The average number of business event participants has seen an overall increase. With respect to different sizes of conferences, meetings and seminars, the amount of events in the smallest size category (up to 50 participants) and also events with 501 to 5000 participants have decreased in 2017 compared with the previous year. By contrast, mid-sized events are growing with the biggest increase in the 51 to 100 participants category (+2.7 percentage points). About 60% of events are attended by a maximum of 100 delegates.

The bigger the event, the more the overall market share of conference hotels decreases and 88% of their events have a maximum of 100 participants. Event centres dominate the market of events with up to 5,000 participants. Compared to 2016, they were able to increase their share specifically in the event size category 2,001 to 5,000 participants (+14.9 percentage points). Large events with more than 5,000 guests are predominantly organised in event venues.
Preferred German federal states

Since the last organiser survey in 2016, the top three German federal states, i.e., Bavaria, North Rhine-Westphalia and Hesse, have remained the same.

Saxony is one of the German federal states moving upwards, overtaking Lower Saxony and now at number six.
No changes since the last organiser survey in 2016: The top three big cities are still Berlin, Munich and Frankfurt/Main.
03 TRENDS & FORECASTS
23.5% of all organisers put on hybrid events. A quarter (26%) of their events are already of a hybrid nature. In particular agencies lead in the context of this future-oriented format, organising more than one third of hybrid events.

At first glance, suppliers assess the situation differently as they come up with a hybrid event share of 8%. However, a rough estimate of the absolute number of hybrid events shows that the information provided by suppliers and organisers is actually going in the same direction.

Suppliers hosting on average the highest number of hybrid events (10% of all events) are event venues. Hybrid events require appropriate tech equipment and specific spaces. Both needs are currently best met by event venues.

Basis: EITW, supplier survey 2018: In your estimation, how high is the share of hybrid events? Organiser survey 2018: Did you also organise hybrid events in 2017? What is the share of hybrid events?
Virtual events

Purely virtual events of organiser

Virtual events replace smaller physical events: 12% of all organisers already organise purely virtual events.

Among those, an average of 18.5% of all organised events are purely virtual.

Analysing organisers in more detail, 21.9% of all events organised by companies are purely virtual ones.

Basic: EITW, supplier survey 2018: Did you also organise purely virtual events in 2017? What was the share of events of a purely virtual nature?
### Budget developments and forecasts

#### Forecasted organisers' budgets 2018 compared with 2017

39.6% of organisers anticipate their budgets to grow further in 2018. Only 11.9% assume that they will decrease this year.

This means that 88.1% of organisers work with the same or an even higher budget and organisers thereby forecast very positive developments for the events market in Germany.

<table>
<thead>
<tr>
<th>Forecast 2017/2018</th>
<th>Budgets 2016/2017</th>
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</thead>
<tbody>
<tr>
<td>39.6%</td>
<td>46.6%</td>
</tr>
<tr>
<td>48.5%</td>
<td>42.7%</td>
</tr>
<tr>
<td>11.9%</td>
<td>10.7%</td>
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</tbody>
</table>

Basis: EITW, organiser survey 2018: Compared with 2017, our budget in the current year 2018 is ... Therefore, our 2017 budget compared with the previous year was ...
Suppliers and organisers were asked to assess the current booking situation, respectively the development in the volume of events. Almost all (88% of suppliers and 93% of organisers) anticipate the development in their own companies to remain as it is or to improve.

Depending on the type of venue, the assessment of the booking situation varies. While only 35% of event centres anticipate improvement, 55.3% report the same level in the volume of bookings. Only 9.7% report a decline. 38.9% of conference hotels have an improved booking situation, however, 18.5% state a worse situation than in the previous year. Event venues have the most positive outlook, with 48.4% reporting a better booking situation than in the previous year. 9.7% expect a decline.

With respect to organisers, agencies in particular are positive, with 76.3% expecting a growth in the number of events, followed by non-profit organisers with 54.1%. 48.7% of companies anticipate positive developments while at 15.4%, the share of organisers with a negative outlook is the highest in companies.

These results for the assessment of the current booking situation mean that suppliers and organisers confirm the positive budget forecasts by organisers.
Trends & Forecasts

**FORECAST for the future development of the events market**

<table>
<thead>
<tr>
<th>Assessment of the development of the events market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suppliers</td>
</tr>
<tr>
<td>67% positive</td>
</tr>
<tr>
<td>27% same</td>
</tr>
<tr>
<td>Organisers</td>
</tr>
<tr>
<td>65% positive</td>
</tr>
<tr>
<td>28% same</td>
</tr>
</tbody>
</table>

67% of polled suppliers and 60% of organisers have a positive view of the event market’s future development.

Supplier forecasts for the overall development of the events industry vary according to the type of venue. **Event centres** have the most positive views. 72.3% anticipate a positive development and the remaining 26.7% work with the assumption that the situation will remain as it is. In the case of **conference hotels**, 86.3% anticipate a positive or unchanged development. Of all venues, the share for a negative outlook (13.7%) is the highest among **conference hotels**. 62% of venues have a positive view of future developments and 29.3% expect no changes.

Among organisers, **companies**, **non-profit** organisers and **agencies** display a similarly positive outlook.

Basis: EITW, supplier and organiser survey 2018: How do you assess the future development of the overall events market?
Summary

Main results

- In the German events market, supply and demand continue to develop on a high level: In 2017, 2.97 million events with 405 million participants took place, constituting a 2.8% growth in participants. The number of venues has increased by 1.3%.

- The number of, generally speaking, bigger events (e.g., international conferences) increases which has positive effects on venue occupancy and internationality of participants, particularly in event centres.

- Seminars, meetings and conferences are the most important type of event. In this context, the number of business events with accompanying exhibitions has grown, too. In event centres, every fifth event comes with such an exhibition.

- The number of physical events decreases, specifically small meetings in hotels. Those are turned into “digital conferences”.

- 23.5% of organisers put on hybrid events. They report that about every fourth event contains hybrid elements. This opens up opportunities for event venues in particular to take ownership of creative and innovative event formats in future.

- The overall industry forecast is positive. Suppliers and organisers are very confident both about the booking situation in 2018 as well as about the future development of the events market.
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