Meeting- & EventBarometer
Germany 2018/19
Study of the Germany meeting, congress and event market
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Glossary

Types of venues:

**EC = Event centres**
Event centres include congress centres, sports and multipurpose halls, arenas as well as community centres that were built to host events and do not offer accommodation.

**CH = Conference hotels**
Alongside meeting facilities, conference hotels also offer accommodation.

**EV = Event venues**
Event venues are special event spaces that have originally been built for purposes other than events. These include, e.g., palaces/castles, museums, factory buildings, studios, leisure parks, universities, airports or co-working spaces.

Types of events:

**Business events**: business-related meetings and events, e.g., congresses, conferences, seminars and workshops but also university events, corporate PR events or corporate galas

**Events**: entertainment and leisure events, such as social and cultural events, sports events and festivities, banquets and anniversaries

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

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

**Social Events**: events that are part of a larger event, e.g., a congress, such as drinks receptions, dinners, sightseeing at destination, etc.

**Festivities**: stand-alone events that are not related to another event, e.g., anniversaries, banquets, weddings, office or other parties

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

**Hybrid events**: events that simultaneously combine a real-world event with virtual elements (e.g., web broadcast)

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

Abbreviations:

**DZT**: Deutsche Zentrale für Tourismus e.V. (German National Tourist Board)

**EVVC**: Europäischer Verband der Veranstaltungs-Centren e.V. (European Association of Event Centres)

**GCB**: German Convention Bureau e.V.

**MEBa**: Meeting- & EventBarometer (Germany study)

**MICE**: Meetings, Incentives, Conventions, Events
Introduction

The annual Meeting- & EventBarometer is the only piece of research that covers the German event market in its entirety, analysing the meetings and congress 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 13th time, the three partners have commissioned the European Institute for the Meetings Industry (EITW) to carry out the research.
Methodology

Responses by suppliers compared with the actual market

From January to March 2019, more than 3,500 venues across Germany with a minimum seating capacity of 100 (in their largest room) were questioned in an online survey. 680 responses were received.

The supplier survey represents the volume and structure of the event market. The answers by suppliers provide sufficient data for all three types of venues to make valid statements, although the highest amount of responses were received from event centres.

Responses by types of venues

Supplier market in Germany

Basis: EITW, supplier survey and own research 2019
01 MARKET INFORMATION
In 2018, the German meeting, congress and event market has continued to become more diversified, which is also due to the megatrends digitalisation and internationalisation.

Putting the Meeting- & EventBarometer 2018/2019 results in context, GCB managing director Matthias Schultze says: “The latest figures show that the event market is becoming more heterogeneous and increasingly diversified. This trend manifests itself in new event formats in venues that cater for the changing requirements brought about by our new, more flexible and cooperative ways of working. Diversification also means that we see more hybrid events with digital elements as well as new marketing tools and a growing number of international attendees. Suppliers in the German event community adjust their activities accordingly which is reflected in the growing importance of digital marketing and sales.”

The diagram on the left illustrates this process of growing attendee demand (D), supply-side adjustments and continuous development and a new type of quality (Q) resulting from the changing structure of events.

Basics: GCB 2019

D = Demand; S = Supply; Q = Quality
Market Information

Market overview 2018/2019

Supply-side situation*

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>7472</td>
<td>+0.9%</td>
</tr>
<tr>
<td>Event centres</td>
<td>1793</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Conference hotels</td>
<td>3396</td>
<td>+0.5%</td>
</tr>
<tr>
<td>Event venues</td>
<td>2283</td>
<td>+2.4%</td>
</tr>
</tbody>
</table>

Demand-side situation

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendees</td>
<td>412 million</td>
<td>+1.6%</td>
</tr>
<tr>
<td>Intl. attendees</td>
<td>9.0%</td>
<td>+0.05 percentage points</td>
</tr>
<tr>
<td>Events</td>
<td>2.89 million</td>
<td>-2.6%</td>
</tr>
<tr>
<td>Length</td>
<td>1.4 days</td>
<td>-0.15 days</td>
</tr>
</tbody>
</table>

*Facilities with a capacity of at least 100 seats in their biggest space when seated in rows
Basis: EITW, supplier survey and own research 2019

High level of demand and consistently strong supply:
412 million people, equalling year-on-year growth of 1.6 percent, attended 2.89 million meetings, congresses and events in German event spaces. The number of events decreased by 2.6 percent.
On the supply side, there are 7,472 event centres, conference hotels and event venues with a minimum capacity of 100 seats in their biggest available room. This equals growth of 0.9 percent in comparison to the previous year.
Market Information

Supply side: venues

Breakdown of venues by type

<table>
<thead>
<tr>
<th>Type</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>EV</td>
<td>30%</td>
</tr>
<tr>
<td>EC</td>
<td>26%</td>
</tr>
<tr>
<td>CH</td>
<td>44%</td>
</tr>
</tbody>
</table>

In 2018, the number of conference and event spaces has grown by 0.9 percent, which is again mainly down to an increase in event venues. However, the overall share of this type of event space stays the same (30 percent of overall market). In particular the number of smaller event venues has grown.

Please note: The conversion of old industrial sites that are being re-purposed as event and congress centres also contributes to the growth in this segment as they are event venues by definition.

Conference hotels have a 44 percent and event centres a 26 percent market share.
Occupancy

Development of occupancy rate

With 179.4, the number of occupied days (= event days plus set-up/take-down days) is higher in 2018 than in 2017 (175 days). The 41.2 days recorded for set-up and take down make up 23 percent of the overall figure.

A breakdown by the different types of event spaces shows that with 198 occupied days, event centres have an above average rate of occupancy, including a 27.4 percent share for set-up and take-down days. Spaces in conference hotels have the same amount of occupied days (198) and have the lowest share of set-up and take-down days (13.5 percent). With 143 days, event venues display a significantly lower occupancy rate. However, it needs to be taken into account that, based on our definition, renting out spaces for events is for many event venues (e.g., museums, zoos, etc.) only of secondary importance. Among all event spaces, they also display the highest number of set-up/take-down days with a share of 28.7 percent.

Basis: EITW, supplier survey 2009 to 2019: occupancy of largest available space
Market Information

 Demand side: attendees, events, organisers

Development in attendance figures and volume of events from 2006 to 2018

Based on attendee figures, which increased slightly in 2018 (+1.6 percent), events continue to be a growth market in Germany.

A trend emerging in recent years sees the number of events decreasing slightly (2018: -2.6 percent in comparison to the previous year), and attendees taking part in fewer events, i.e., meetings, congresses and events tend to get bigger.

The use of new tech tools is one of the many factors influencing an increasingly varied market in this context.

Basis: EITW, supplier survey 2007 to 2019: total number of events, total number of attendees
The overall decrease in events by 2.6 percent can mainly be attributed to fewer events taking place in event centres and conference hotels. A decline in events in small event spaces has a considerable overall impact as these facilities usually host a large share of events (irrespective of the attendee figures). Conference hotels with a capacity of more than 1,000 seats and event venues in general record a positive trend.

The number of events has decreased by approximately 77,500 in 2018 and both event centres and conference hotels take an equal share of this decrease so that the percentage of events broken down by the different types of venues has hardly changed in comparison the previous year. As event venues only host about one tenth of all events, an increase in events taking place in this type of space only has little impact on the overall picture.

Please note: The outlook for the future event market underline the more difficult situation for conference hotels.
Events: long-term comparison incl. changes by type of venue

Events by type of venue from 2009 to 2018

A long-term comparison of the percentage share of events taking place in the different types of venues reveals a shift from conference hotels to event centres. Conference hotels increasingly host fewer events while event centres record growth. The share of event venues remains largely stable.

Looking at the last five years, event centres on average display a 9.5 percent growth in events and thus the most positive development. In the same period, event venues show growth of on average of 2 percent. The decline in the number of events is reflected in conference hotels hosting on average 0.8 percent fewer events.

Basis: EITW, supplier survey 2010 to 2019: total number of events
Market Information

Attendees

Attendees by type of venue

- EC: 51%
- CH: 22%
- EV: 27%

The overall 1.6 percent growth in attendees can mainly be attributed to conference hotels and event venues.

This is also reflected in the percentage distribution of attendees with conference hotels and event venues each increasing their market share by one percentage point at the expense of event centres (-2 percentage points).

Basis: EITW, supplier survey 2019: total number of attendees
In 2018, the German event market continued to become more international and events continued to be of increasing importance in Germany. On average, the share of international attendees is 9 percent, equalling 37.2 million attendees travelling to Germany from abroad. This is equivalent to a year-on-year growth of 2.1 percent. Within the last 13 years, the number of international visitors attending events in Germany has almost trebled (2006: 14.3 million).

Depending on the type of venue the average value varies. International attendance has increased in conference hotels and, at 13.1 percent (+2.3 percentage points), is still the highest in this type of venue. Event venues also see growth in international attendance figures to 9.3 percent (+0.9 percentage points), while the number of international attendees decreases in event centres and is at 7.4 percent (-0.6 percentage points).

Basis: EITW, supplier survey 2007 to 2019: total number of international attendees
In 2018, congresses, meetings and seminars are again the by far most important type of event in German venues, growing by 3.1 percentage points.

Exhibitions and presentations have declined to the level of previous years. The share of other types of events such as social events, local events and festivities has more or less remained unchanged.
Market Information

Event types by different types of venues

Event centres

Half of all events (49 percent) in event centres are congresses, meetings and seminars. Cultural and sports events are the second strongest type of event (17 percent).

Event centres have a higher share of local events than conference hotels and event venues.

In comparison to the previous year, in particular small (capacity of up to 250) and large event centres (capacity of 4,000+) record growth while medium-sized and larger event centres see a decrease in seminars, meetings and congresses as well as in the exhibition/presentation category.

In conference hotels, congresses, meetings and seminars account for about three-quarters (73 percent) of events.

Festivities are the second most important type of event, followed by festivities and social events.

Cultural and sports events only play a marginal role.

Very big conference hotels mainly see growth in seminar, meetings and congresses while the general decline of events hosted in conference hotels can be attributed to fewer exhibitions/presentations and festivities.

Conference hotels

Event venues

With 31 percent, congresses, meetings and seminars account for the biggest share in event venues.

Festivities follow as the second most important type of event and they are, in general, mainly organised in event venues.

Cultural and sports events have a share of 14 percent in event venues.

Social events account for 10 percent of all events.

Growth in events hosted in event venues can be attributed to seminars, meeting and congresses but also partly to the festivities category.

Basis: EITW, supplier survey 2018 & 2019: breakdown by type of events (please provide figures for each type of event)
Congress, meetings and seminars with accompanying exhibition

Share of congresses, meetings and seminars with exhibitions

Congress, meetings and seminars with exhibitions are on the up.

In 2018, 17 percent of conferences taking place in German venues included an exhibition.

This share is highest in event centres (22 percent) and accounts for more than a fifth of all meetings and congresses. Event venues also have a high share of events with exhibitions (18 percent) while the percentage in conference hotels is much lower (8 percent).

Basis: EITW, supplier survey 2016-2019: percentage of congresses, meetings and seminars that include an exhibition.
Types of events: business events

Business events include congresses, meetings and seminars as well as exhibitions and presentations. All other types are summarised under (other) events. This simplified differentiation allows for a clear presentation of the breakdown by business events on the one hand and leisure/entertainment events on the other for the entire market as well as within the different types of venues.

At 66 percent, the share of business events in 2018 remained unchanged compared with the previous year.

In events centres, business events account for the majority of events with a 53.6 percent share, however, they decrease by 6.6 percentage points compared with the previous year. Especially in conference hotels, business events are the dominant type of event (77.6 percent). Event venues mainly host (other) events with a 63.5 percent share.
In comparison to the previous year, the number of small congresses, meetings and seminars in the size category of up to 250 attendees have grown in 2018. Large events of 2,000 attendees and more remain at the same level.

Depending on the type of venue and seating capacity the changes vary. The increase in the smallest size category can mainly be attributed to smaller event venues and event centres (with up to 500 seats respectively). Big event venues (1,000 to 4,000 seats) see an increasing number of events with 251 to 2,000 attendees and make up for the fact that this size category has decreased in event centres. Conference hotels experience the decline in events in all size categories apart from a slight increase in events with 101 to 250 attendees in larger conference hotels.

The bigger the events the smaller the share of conference hotels in the overall event market as 80.3 percent of events in hotels have a maximum of 100 attendees.
A long-term comparison from 2009 to 2018 reveals that the number of small seminars and meetings regularly fluctuates, with the smallest size category (up to 50 attendees) and the up to 250 attendees category moving in opposite directions.

However, fact is that the smallest seminar, meetings and congress category has declined over the years. While it still had an above 50 percent market share in 2009, it is now in the 40 percent range.

In contrast, the share of large meetings and conferences is subject to less fluctuation and remains at a constant level.
Seminars, meetings, congresses: spotlight on one size category

Of all size categories, seminars, meetings and congresses with 501 to 1,000 attendees decreased the most in 2018 (-1.4 percentage points).

This decline can mainly attributed to event centres hosting fewer events in this size category, after having reached their highest share in this category in the previous year (2017). Event venues recorded a return of growth in this size category in 2018.

Basis: EITW, supplier survey 2008 to 2019: size category of seminar, meetings and congresses
Hybrid events

Based on suppliers’ estimates, hybrid events account for an average of 10.4 percent of all events in 2018. This equals a year-on-year increase of 2.3 percentage points.

Broken down by different venue types, the share of hybrid events varies only slightly.

In comparison to 2017, the number of hybrid events almost doubled in event centres. In conference hotels and event venues their share only slightly increased or decreased.

Depending on the size of venues, developments vary: Regarding event centres, particularly large facilities host a higher share of hybrid events. The same applies to conference hotels where small suppliers (seating capacity for up to 250) tend to have fewer hybrid events, while larger conference hotels host more. Regarding event venues, developments are irregular and increases or decreases cannot be correlated with seating capacities.

Basis: EITW, supplier survey 2018 & 2019: How high do you estimate the share of hybrid events?
## Technologies and digital elements used at hybrid events

<table>
<thead>
<tr>
<th>Element</th>
<th>Usage Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use of mobile applications during event</td>
<td>40.6%</td>
</tr>
<tr>
<td>Online live streaming</td>
<td>34.0%</td>
</tr>
<tr>
<td>Video conferencing</td>
<td>32.9%</td>
</tr>
<tr>
<td>Live coverage on social media</td>
<td>26.9%</td>
</tr>
<tr>
<td>Availability of sessions in video format post-event</td>
<td>19.7%</td>
</tr>
<tr>
<td>Cloud services</td>
<td>17.5%</td>
</tr>
<tr>
<td>Twitter wall</td>
<td>7.4%</td>
</tr>
<tr>
<td>Other</td>
<td>2.5%</td>
</tr>
</tbody>
</table>

Supplier survey 2019: Which hybrid elements were used at the events? (multiple mentions possible)

The use of mobile applications during events is the most common digital element of hybrid events, followed by online live streaming and video conferencing.

Depending on the type of venue, the ranking of technologies used differs. While video conferencing is at the top in conference hotels, online live streaming leads the ranking in event centres.

Other elements such as twitter walls are less frequently used. Ultimately, the use of different tech tools and digital elements is also determined by the respective event format.
## Origin of organisers: internationale source markets

### Ranking of the most important international source markets

<table>
<thead>
<tr>
<th>Source markets 2018</th>
<th>Source markets 2012</th>
<th>Source markets 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Switzerland</td>
<td>UK</td>
<td>UK</td>
</tr>
<tr>
<td>2. Austria</td>
<td>USA</td>
<td>USA</td>
</tr>
<tr>
<td>3. Netherlands</td>
<td>Switzerland</td>
<td>Switzerland</td>
</tr>
<tr>
<td>4. UK</td>
<td>Netherlands</td>
<td>Netherlands</td>
</tr>
<tr>
<td>5. USA</td>
<td>France</td>
<td>Austria</td>
</tr>
<tr>
<td>6. France</td>
<td>Austria</td>
<td>Italy</td>
</tr>
<tr>
<td>7. Belgium</td>
<td>Belgium</td>
<td>Sweden</td>
</tr>
<tr>
<td>8. China</td>
<td>Denmark</td>
<td>France</td>
</tr>
<tr>
<td>9. Italy</td>
<td>Italy</td>
<td></td>
</tr>
<tr>
<td>10. Russia</td>
<td>Poland</td>
<td></td>
</tr>
</tbody>
</table>

The top positions in the ranking of the most important international source markets have changed in comparison to the last time this aspect was surveyed (in 2011 & 2012). The top three positions are held by Germany’s direct neighbours Switzerland, Austria and the Netherlands, while the UK and USA have moved down to place four and five. China is for the first time in the top ten, climbing up from rank 11 in 2012.

Depending on the type of venue, the ranking of source markets varies. In conference hotels, USA is at the top, the UK is the third most important international source market and China is at number 7.

In event centres, Austria, Switzerland and the Netherlands are the top three source markets while in event venues the Netherlands is at number 1, followed by Switzerland and Austria.
Corporates are the most common type of organisers. They are very visible in conference hotels where they account for almost half of all event planning clients. Associations are the second most important type of event organiser, followed by agencies.

Compared to previous years, associations and scientific organisations and institutions as organisers have become more important in 2018. In this context, associations are not as significant as clients for event venues while conference hotels have the largest share of clients from the science sector.

### Breakdown of organiser types 2016-2018

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporates</td>
<td>52.1%</td>
<td>43.7%</td>
<td>43.1%</td>
</tr>
<tr>
<td>Associations</td>
<td>12.2%</td>
<td>14.6%</td>
<td>20.7%</td>
</tr>
<tr>
<td>Agencies</td>
<td>12.1%</td>
<td>16.1%</td>
<td>14.7%</td>
</tr>
<tr>
<td>Science</td>
<td>6.3%</td>
<td>6.5%</td>
<td>10.3%</td>
</tr>
<tr>
<td>Other</td>
<td>17.3%</td>
<td>19.1%</td>
<td>11.2%</td>
</tr>
</tbody>
</table>

Basis: EITW, supplier survey 2019: makeup of events by different types of organisers
02 MARKETING ACTIVITIES
Marketing Activities

Overall split of supply-side marketing budget

Venues in total

61,1%  38,9%

Online activities  Offline activities

Marketing budgets are allocated for many different activities. Those can roughly be divided in online and offline activities. Online measures include a website, listings on online marketplaces for venue hire, social media or email newsletters while offline measures cover participation in trade fairs, print collateral (brochures, flyers) and face-to-face acquisition.

On average, venues spend the majority (61.1 percent) of their marketing budget on online activities.

Basis: EITW, supplier survey 2019: How do you split your marketing budget among the following online and offline activities?
Marketing Activities

Supply-side marketing budget by type of venue

- **EC**: 48.5% online, 51.5% offline
- **CH**: 71% online, 29% offline
- **EV**: 70% online, 30% offline

The online/offline marketing budget split varies by type of venue.

While conference hotels and event venues have shifted 70 percent of their marketing budget online, event centres still use just over 50 percent of their marketing budget for offline channels.

Basis: EITW, supplier survey 2019: How do you split your marketing budget among the following online and offline activities?
### Most common supply-side marketing activities

Irrespective of how much of the budget is spent on any given marketing activities, this chart shows which activities are the most commonly used.

Among the top 3 activities, the first two are online marketing measures. One’s own website and listings on online marketplaces are more important than conventional print brochures. Human interaction, such as face-to-face acquisition and being present at trade shows, is also high up in the ranking at number 5 and 7.

Depending on venue type or size of the venue the ranking varies.

<table>
<thead>
<tr>
<th>Marketing Activity</th>
<th>Use of online measures</th>
<th>Use of offline measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dedicated website content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Listing on online venue hire marketplaces</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dedicated event sector brochure/flyer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social media activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Face-to-face acquisition</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email newsletter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participation in MICE trade shows</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print advertising in trade magazines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online advertising in trade magazines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email marketing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inviting decision makers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SEO</td>
<td></td>
<td></td>
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<tr>
<td>Customer mail shots (by post)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Content marketing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SEA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blogger relations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Webinars</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Live Reporting</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Basis: EITW, supplier survey 2019: How do you split your marketing budget among the following online and offline activities? (multiple mentions)
Marketing Activities

Use of online marketplaces for venue hire

Share of events booked via online marketplaces

<table>
<thead>
<tr>
<th>Venue Type</th>
<th>2019 Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event centres</td>
<td>7.1%</td>
</tr>
<tr>
<td>Conference hotels</td>
<td>21.2%</td>
</tr>
<tr>
<td>Other venues</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

10.8%

In 2015, when these figures were last surveyed, suppliers reported that 10.6 percent of all events were booked via online marketplaces. With 15 percent, conference hotels recorded the highest share.

In 2019, the volume of events booked via online platforms has hardly increased (+0.2 percentage points). However, a breakdown by venue type reveals that the number of events booked on online marketplaces increased in event centres and mainly in conference hotels.

Every 10th event is booked via an online marketplace - in conference hotels even every 5th event!

Basis: EITW, supplier survey 2019: Which percentage of your events is booked via online marketplaces?
Importance of online marketplaces for bookings by event size categories

Share of bookings via online marketplaces by event size categories

The bigger the event, the lower the share of bookings via online marketplaces. Events in the 20 to 50 attendees size category are the ones most frequently booked via marketplaces, followed by medium-sized events of up to 250 attendees.

Among the venue suppliers listed on marketplaces, conference hotels have a considerably higher share than venue centres and event venues. Hence, conference hotels reach double-digit shares in online marketplace booking even when it comes to events of up to 1,000 attendees.

Basis: EITW, supplier survey 2019: breakdown of event bookings by different events sizes
Sustainability

Sustainability management systems in venues

Development of sustainability management systems among venue providers

Since 2011, the share of sustainability management systems in place has seen a positive development, from 27 to more than 40 percent. With 45 percent, large venues with a seating capacity of more than 1,000 have an even higher share.

Three-quarters (75.6 percent) of these sustainability management systems have been reviewed by an independent third party.

Supply-side sustainability management systems

Share of sustainability management systems by type of venue

Looking at the different types of venues, already more than 50 percent of conference hotels operate with a sustainability management system, making this the venue type with the highest share.

In the event centres and event venues categories the number of facilities operating with a sustainability management system has increased since 2013. However, especially with regard to event venues there is room for improvement.

Are sustainability management systems a result of CSR reporting obligations?

38.1 percent of sustainability management systems were implemented because of CSR reporting obligations. This also means that more than 60 percent of venues implemented their sustainability management system not because they are obliged to but because they believe in its importance.

There are noticeable differences between event venues where only 7.1 percent implemented their system because of CSR reporting obligations and event centres and conference hotels with a share of more than 40 percent who introduced their system because of the reporting obligations.

Basis: EITW, supplier survey 2019: Have CSR reporting obligations resulted in the implementation of a sustainability certificate/sustainability management system in your company?
04 OUTLOOK
### Booking situation in the current year

**Booking situation for suppliers in 2019 compared with the previous year**

<table>
<thead>
<tr>
<th>Suppliers 2019</th>
<th>35%</th>
<th>53%</th>
<th></th>
<th>Suppliers 2018</th>
<th>40%</th>
<th>48%</th>
</tr>
</thead>
<tbody>
<tr>
<td>better</td>
<td></td>
<td></td>
<td></td>
<td>same</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Suppliers were asked to assess the current booking situation, respectively the development in the number of venues. Almost all (88.2 percent of suppliers) expect the development for their companies to be better or remain the same.

The assessment of the booking situation varies by type of venue. While only 30.8 percent of event centres expect an improvement, 58.3 percent report the same booking volumes as in the previous year. 40 percent of conference hotels expect an improvement, however, **16.9 percent describe the booking situation as worse than in 2018**. Event venues have the least negative outlook, with only 8.8 percent expecting a deterioration.

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Basis: EITW, supplier: How do you assess the booking situation for events (2019) in your venue in comparison to 2018?
Future development of the event market

Assessment of the event market development

<table>
<thead>
<tr>
<th>Suppliers 2019</th>
<th>Suppliers 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>positive</td>
<td>48%</td>
</tr>
<tr>
<td>same</td>
<td>43%</td>
</tr>
<tr>
<td>positive</td>
<td>67%</td>
</tr>
<tr>
<td>same</td>
<td>27%</td>
</tr>
</tbody>
</table>

48.1 percent of the surveyed suppliers make a **positive assessment of the development of the event market**, a significant decrease in comparison to 2018 when 67 percent had a positive outlook. The share of suppliers voicing a negative assessment has risen to 9 percent.

The outlook for the overall development of the event market varies by type of venue. Operators of **event venues** are the most positive. 67.2 expect a positive development and only 5.2 percent expect a negative development. 77.6 of **conference hotel** operators expect developments to be positive or remain the same. With 22.4 percent, **conference hotel** have the highest share of venues expecting negative market developments and compared with last year, this share has also increased (2018: 13.7 percent). 41.1 percent of **venue centre** operators expect a positive development while 53.5 percent expect things to remain the same.

Basis: EITW, supplier survey 2018 & 2019: How do you assess the future development of the overall event market?
Summary

Key findings

• The German meeting and event market continues to be on the up, with growth both on the supply and the demand side: Based on the total number of attendees, meetings, congresses and events continue to be a growth market in Germany. The analysis reveals an increase of 1.6 percent to a total of 412 million attendees. A trend that has emerged in recent years sees attendees taking part in an overall smaller number of events. This shift in an increasingly varied market is partly due to the use of new technologies, with smaller meetings moving in the digital space, and is of advantage for medium-sized to larger events.

• Congresses, meetings and seminars as top event types with highest growth rate, forming the pillars of the German event market. The share of meetings and congresses with an accompanying exhibition remains at a constant high level. In event centres, every fifth event is accompanied by an exhibition.

• Scientific institutions and associations stand out as event organisers in 2018. While corporates are still the most important type of organiser for venues, associations have increased their share since 2016 from 12 to 21 percent and organisers from the science sector have gone from a 6 percent share in 2016 up to 10 percent.

• Eventisation and technology as drivers for MICE sector: The number of hybrid events is increasing. Mobile applications are most commonly used at hybrid events, followed by live streaming and video conferencing.

• Own website und listing on online marketplaces more important than print brochure: Every 10th event is being booked via an online marketplace. In conference hotels, bookings via online marketplaces already account for a fifth of events.

• Digitalisation and sustainability as biggest metatrends in 2018/2019 MICE market: Online market places and sustainability managements systems continue to grow in importance.

• Direct neighbours Austria, Switzerland and the Netherlands are Germany’s most important international source markets, replacing previous top source markets USA and UK.
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