Meeting & EventBarometer
Germany 2014/15

The Study of the Congress and Events Market in Germany
Press Conference  |  19 May 2015  |  IMEX Frankfurt
Methodology

**Online survey** in March/April 2015
- More than 7,000 event venues in Germany
  (> 100 seats in the largest hall)
- Nearly 8,000 organisers worldwide

**Structure of returns**

Providers:
- 39% event centres
- 38% conference hotels
- 23% event locations

Organisers:
- 55% Germany
- 20% Europe
- 25% outside EU
- 38% agencies
- 32% associations
- 26% companies
Market Information
Germany is the leading European destination for conferences – Berlin has risen to fourth place

For the eleventh year in a row Germany is first place in Europe and second place worldwide

ICCA country ranking
1. USA
2. Germany
3. Spain
4. Great Britain
5. France

ICCA city ranking
1. Paris
2. Vienna
3. Madrid
4. Berlin
5. Barcelona

Basis: ICCA International Congress and Convention Association 2014, Country & City Rankings
Alongside congresses and meetings, Germany is also among the top 3 countries in the world considered tourist friendly.

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<th>Rank</th>
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Basis: WEF Travel and Tourism Competitiveness Report 2015
Business trips by Europeans to Germany

Conferences and meetings are the engines of the market for business trips

12.3 million business trips

of which 56% for conferences/meetings incentives and trade fairs/exhibitions

Source: DZT/WTM, IPK 2015

Variances due to rounding up
Market Information

Germany remains the leader among the Top 10 business trip destinations of Europeans

Foreign business trips by Europeans in total 2014: 61.8 million

- Germany 12.3
- France 5.0
- Great Britain 4.5
- Austria 3.6
- Spain 3.3
- Italy 3.2
- USA 2.2
- Netherlands 2.1
- Russia 2.0
- Poland 1.9
- Sweden 1.7
- Switzerland 1.7

Business trips in millions
Basis: DZT/WTM, IPK 2015
Variances due to rounding up

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Meetings and conferences best development compared to other reasons for business trips to Germany since 2006

Business trips by Europeans to Germany: 2006 as compared to 2014
Basis: DZT/WTM, IPK 2007-2015
### Modest growth in the German meeting and events market

#### Supply side

| Meeting and event venues in total\(^1\) | 7,152 (+ 1.7\%) |
| Congress and event centres (EC) | 1,766 (+ 2.8\%) |
| Conference hotels (CH) | 3,298 (+ 0.3\%) |
| Event locations (EL)\(^2\) | 2,088 (+ 3.0\%) |

#### Demand side

| Meetings and events | 3.04 million (+ 1.0\%) |
| Average duration | 1.6 days (+ 0.08) |
| Participants in total | 383 million (+ 3.3\%) |
| of which from abroad | 6.7% (+ 0.4\%) |

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\(^1\) Establishments with at least 100 seats in the largest hall with seating in rows
\(^2\) Castle, monastery, museum, factory hall/engine shed, studio, leisure park, zoo, educational establishment/college, airport

Basis: EITW, own research and supplier survey 2015: various enquiries
Meeting market in Germany still experiencing modest growth at a high level

Basis: EITW, supplier surveys 2007-2015: total number of events; total number of participants
The constant increase of international participants in recent years continues

International participants in events in Germany

Basis: EITW, supplier surveys 2007-2015: (total number of participants) – of which from abroad in %
Most international organisers come from Great Britain, Austria and the USA

Providers

- Great Britain
- USA
- Austria
- Switzerland
- Netherlands

Basis: EITW, supplier survey 2015: Which international source markets are the most important for your event venue?
High level of consistency budget allocation

Modest increases in the middle segment: between € 500,001 and 1,000,000.

Basis: EITW, organiser survey 2015: companies/associations: How big was your overall budget for meetings and events in 2014?
Agencies: How big were the budgets you managed per organising company on average?
Meeting and Events Market Germany

Image

01

02

03
Germany, followed by the USA and Spain are still the 3 most popular among organisers

1. Germany
2. USA
3. Spain
4. France
5. Italy
6. Austria
7. Switzerland
8. Great Britain
9. Netherlands
10. Turkey

Basis: EITW, organiser questionnaire 2015: preferred meeting destinations WORLDWIDE
The top 3 major cities remain constant, Cologne rises in popularity among organisers.
Provider websites and personal recommendations for organisers are the most important information sources for choice of destination

*CB: Convention Bureau, **DMO: Destination Management Organisation

Basis: EITW, organiser questionnaire 2015: How “important” are the following information sources for you in selecting an event venue or location?
Themes & Trends
What moves the industry?

An examination of the future and of current challenges makes it possible to secure and further develop Germany’s successful position as a destination for meetings and congresses.

Survey of providers (event venues) in Germany and organisers in Germany, Europe and outside Europe
Themes & Trends

Megatrends* and specific current questions

* Source: study „Meetings and conventions 2030: A study of megatrends shaping our industry“, Client/Publisher: GCB German Convention Bureau e. V.
Providers and organisers give different assessments of WLAN in the event venue

WLAN is more important for organisers

Basis: EITW, supplier survey 2015: In your opinion how important is the WLAN for the customer? Organiser questionnaire: How important is the WLAN for participants in the event venue?
Technology in work and life

Free WLAN standard for organisers

Basis: EITW 2015, Organiser questionnaire: Should WLAN be available free of charge?
Technology in work and life

Organisers rate the importance of digital technology higher

- Use of mobile apps during the event: 51.3% for provider, 65.9% for organiser
- Discussion forums: 31.4% for provider, 45.5% for organiser
- Cloud services (providing data and services online): 18.1% for provider, 31.1% for organiser
- Sessions provided as video one day after: 16.2% for provider, 31.1% for organiser
- Live stream on the internet: 28.8% for provider, 22.7% for organiser
- Live-coverage in social media: 14.4% for provider, 22.7% for organiser

Basis: EITW, provider and organiser questionnaire 2015: Technical offer for events: What technical offers to you regard as normal for a meeting of over 100 participants?
Digital media has become more important for organisers over the last four years

Increase of 0.3 grades with all digital media in comparison with the last recorded figure in 2012

Themes & Trends

Basis: EITW, organiser questionnaires 2013/2015: What importance do the following information sources have for you when it comes to the choice of an event venue or event location?
Meeting portals are used more by organisers than by providers

Providers: conference hotels in particular are heavily represented in meeting portals

Organisers: companies use portals the most, followed by agencies

Basis: EITW, 2015, supplier survey: What percentage of your event volume is realised via a meeting portal? Organiser questionnaire: What percentage of your events is processed via the meeting portals?
Enquiries are made via meeting portals, particularly for small meetings!

In general, two thirds of organisers stated that meetings with up to 250 participants are most frequently processed via meeting portals. However, large and international meetings are also implemented via portals.

International customers in particular make enquiries via meeting portals.

Basis: EITW, organiser questionnaire 2015: With which number of participants (or event size) are bookings for meetings/congresses most frequently processed via these platforms? (multiple answers possible)
Organiser-related themes

Organisers carry out 16% of their events as hybrids

In the case of hybrid events, real events are combined with simultaneous virtual components (e.g. web broadcast, social media streams).

Basis: EITW, organiser questionnaire: What is the portion of hybrid events in your seminars, meetings and congresses?
Almost every second provider in Germany has a sustainability management system

Basis: EITW, supplier survey 2015: Have you already integrated a sustainability management system in your company?
Over 50% of event planners prefer providers with a sustainability management system.

Organisers are paying more and more attention to sustainability work by providers.

Basis: EITW, organiser questionnaire 2015: Do you prefer providers who can show a certificate for a sustainability management system?
Themes & Trends

Sustainable development

Sustainability endeavours enhance perceived quality:

Basis: EITW, organiser questionnaire 2015: Does a noticeable quality improvement go hand in hand with sustainability endeavours by event venues?

Sustainability efforts are noticed!

2013
- Yes: 27.0%
- No: 29.8%
- Can’t say: 43.3%

2015
- Yes: 35.6%
- No: 16.1%
- Can’t say: 48.3%

Press Conference | 19 May 2015
Themes & Trends

Disabled access is very established in the company policy of venue companies:
More than with organisers

Demographic change

Basis: EITW, provider and organiser questionnaire 2015: Is disabled access established in your company policy?
Providers offer more services with disabled access than are requested by organisers

Demographic change

Exceptions: deaf and blind people

→ Improvement needed!

Basis: EITW, 2015, supplier survey: ... for which guest groups do you offer services with disabled access in your premises? Organiser questionnaire: For which guest groups are services with disabled access most important in event organisation? (multiple response possible)
"Do good and let people know about it"

In the case of 80% of providers, disabled access is established in the philosophy – but only 52% provide information about it!

Organisers need more information about disabled access on the websites

ONLY 15% of organisers in Germany considered the information to be adequate:
65% say: "No, could be better"!

Basis: EITW, 2015, supplier survey: ... Do you provide information on your website about disabled access in your event venue? Organiser questionnaire: Do you consider the information concerning disabled access in event venues (on the website, in portals) adequate?
Positive market assessment 2015 for Germany - in relation to bookings

**Providers:** 88% consider event bookings in 2015 better or the same compared to 2014.

Basis: EITW, supplier survey 2015, year comparison: What is your current evaluation of the booking situation for events (2015) in comparison to 2014 in your event venue?
Themes & Trends

... and in relation to budgets

Organisers: 82% rate the budget level in 2015 as better or the same as in 2014.

Basis: EITW, organiser questionnaire 2015: Our budget in the current year 2015 in comparison with 2014 is ...

- Increased: 38.5%
- Unchanged: 43.6%
- Decreased: 17.9%
Themes & Trends

Future prognoses: even better than the current market assessment

Overall market trend:

- Positive: 51.7% (provider), 58% (organiser)
- Unchanged: 41.8% (provider), 31% (organiser)
- Negative: 6.5% (provider), 11% (organiser)

Both providers and organisers estimate that the future market trend will be better than the current situation!

Basis: EITW, provider and organiser questionnaire 2015: What is your assessment of the future trend in the overall event market?
Conclusion

Germany is the most popular destination among organisers who were questioned, and the number of international participants are increasing.

Organisers’ expectations in terms of technology have not yet been fulfilled by the market.

Over 50% of event planners prefer providers with a sustainability management system.

There needs to be greater provision of information by providers about disabled access.

Constant market growth, positive assessment of the current market situation and of the future trend.
Current partners’ projects

• **Survey** concerning the “organisation and expenditure in conference marketing at destination level”

• **Figures, data, facts:**
All figures for the industry condensed in a brochure

• **Future Meeting Space:**
Systematic anticipation of relevant developments in the events sector

• **Consultation:** Tourism Committee of the German parliament on 10 June 2015
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