Meeting- & EventBarometer
Germany 2013/14

The Germany-based study of the congress and events market
Press conference | 20 May 2014 | IMEX Frankfurt
Method

**Online survey** in March/April 2014
- ca. 7,000 event venues in Germany
  (> 100 seating places in the largest room)
- ca. 8,000 organisers worldwide

**Structure of responses**

Providers:
- 35% event centres –
  43% meeting hotels – 22% event locations

Organisers:
- 44% Germany – 22% Europe – 34% outside EU
  43% agencies – 32% associations – 25% companies
Market Information

01

02

03
Germany is the leading European destination for congresses

Germany takes first place in Europe for the 10th time in succession and second place in the world

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

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

Basis: ICCA International Congress and Convention Association 2013, Country & City Rankings
Promotable business trips planned for growth

Europeans’ business trips to Germany rose in 2013 with an increase of +0.6% to 12.6 million

Promotable business trips
MS 55% 6.9 million
2012/2013
+ 11.8%

MS = market share | Source: DZT/WTM, IPK 2014
Differences caused by rounding
Germany takes first position among Europeans‘ top 10 business travel destinations

Germany
France
Great Britain
Italy
Spain
Austria
Russia
USA
Netherlands
Poland
Sweden
China

Traditional business trips
Promotable business trips
(Fairs, conferences, incentives)

Business trips in millions
Basis: DZT/WTM, IPK 2014
Meetings and congresses are the drivers of the market for business trips

Business trips by Europeans to Germany for meetings and congresses

Basis: DZT/WTM, IPK 2014
Slight growth in the German meeting and events market

<table>
<thead>
<tr>
<th>Supply situation</th>
<th>Demand situation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Meeting and event venues in total</strong>&lt;sup&gt;1&lt;/sup&gt;</td>
<td><strong>Meetings and Events</strong></td>
</tr>
<tr>
<td>7,034 (+ 1.4%)</td>
<td>3.01 million (+ 1.3%)</td>
</tr>
<tr>
<td>Congress and event centres (EC)</td>
<td>Average duration</td>
</tr>
<tr>
<td>1,718 (+ 3.3%)</td>
<td>1.52 days (- 0.03)</td>
</tr>
<tr>
<td>Meeting hotels (MH)</td>
<td>Participants in total</td>
</tr>
<tr>
<td>3,288 (- 0.1%)</td>
<td>371 million (+2.5%)</td>
</tr>
<tr>
<td>Event locations (EL)&lt;sup&gt;2&lt;/sup&gt;</td>
<td>of which from abroad</td>
</tr>
<tr>
<td>2,028 (+ 2.1%)</td>
<td>6.3 % (+ 0.2%)</td>
</tr>
</tbody>
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1 Operations with at least 100 seating places in the largest room with seating in rows
2 Castle, monastery, museum, production hall/locomotive housing, studio, leisure park, zoo, educational establishment/college or university, airport

Basis: EITW, own research and provider survey 2014: various enquiries
Meetings industry in Germany showing slight growth trend at a high level

Basis: EITW, provider questionnaires 2007-2014: overall number of events, total number of participants
How has the market changed in recent years?
Meetings are becoming more international
Constant increase in international participants over recent years

38% of providers and 45% of organisers believe that there will be a further increase in the importance of international meetings and events in the future.

Basis: EITW, provider questionnaires 2007-2014: (total number of participants) – of which from abroad in %
Budget increases
The proportion of large budgets (above € 500,000) has almost doubled since 2007.

Basis: EITW, organiser questionnaires 2007-2014: companies/associations: How high was your total budget for conferences and events in 2013? Agencies: How high was the average of budgets you managed on behalf of companies sponsoring events (total per company)?
What is Germany’s image as a country for meetings?

Germany stands for good availability, good supply and service quality.

In the case of foreign organisers, the attractive price/performance ratio!

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick and easy to reach</td>
<td>88.6%</td>
</tr>
<tr>
<td>Very good hotels available</td>
<td>74.0%</td>
</tr>
<tr>
<td>Good service quality</td>
<td>65.8%</td>
</tr>
<tr>
<td>Attractive price/performance ratio</td>
<td>61.6%</td>
</tr>
<tr>
<td>Event venues for every need</td>
<td>58.4%</td>
</tr>
<tr>
<td>Interesting historic sights</td>
<td>50.2%</td>
</tr>
<tr>
<td>Ideal location for international congresses</td>
<td>47.5%</td>
</tr>
<tr>
<td>Liberal-minded and hospitable country</td>
<td>39.3%</td>
</tr>
<tr>
<td>Multifaceted and good catering</td>
<td>38.8%</td>
</tr>
<tr>
<td>Multiple possibilities for framework program</td>
<td>37.0%</td>
</tr>
<tr>
<td>Varied landscape</td>
<td>36.1%</td>
</tr>
<tr>
<td>Event locations suited to seems</td>
<td>32.4%</td>
</tr>
<tr>
<td>Good shopping opportunities</td>
<td>21.0%</td>
</tr>
</tbody>
</table>

Basis: EITW, provider and organiser questionnaire: Please choose aspects that are applicable for the event destination Germany from the list (multiple answers allowed)
In terms of popularity among organisers questioned, Germany comes higher than the USA in a world comparison

1. Germany
2. USA
3. Spain
4. Italy
5. Great Britain
6. Austria
7. France
8. Canada
9. Belgium
10. Denmark

Netherlands
Switzerland

Basis: EITW, organiser questionnaire: Preferred countries WORLDWIDE
Large German cities with ongoing popularity

1. Berlin
2. Munich
3. Frankfurt/Main
4. Hamburg
5. Cologne
6. Düsseldorf
7. Stuttgart
8. Hanover
9. Leipzig
10. Nuremberg

Basis: EITW, organiser questionnaire: Preferred major cities in Germany
Meeting and Events market Germany

Themes & Trends

01

02

03
Themes & Trends

What drives the sector?

A look at the future as well as current challenges and trends serve to secure and further develop Germany’s successful position as a destination for meetings and congresses.

Provider survey (event venues) in Germany and organisers in Germany, Europe and outside Europe
Megatrends* and specific current issues

* Source: “Meetings and Conventions 2030: A study of megatrends shaping our industry.”,
Publisher: GCB German Convention Bureau e. V.
Technologisation of life and work

Cloud services for organisation and management of events are becoming more important
63% of providers and 65% of organisers agree

Other trends

• Digitalisation, social media
• More technology at events
• Online meetings – hybride events
• Mobile event-based apps
• Free WLAN
• Gamification

Basis: EITW, provider and organiser questionnaire: Please state if the following themes will increase or decrease in importance in 2014.
Themes & Trends

Sustainable development

Increasingly important:
Taking into account sustainable components
82% of providers
66% of organisers

Reduction/compensation of CO₂ emissions
61% of providers
52% of organisers – say this is a trend

Basis: EITW, provider and organiser questionnaire: Please state if the following themes will increase or decrease in importance in 2014.
 Themes & Trends

Event-related themes

New event formats (e.g. bar camps)
57% of providers
62% of organisers – see this as a challenge

Other trends in the events market:
Framework programme/events
Greater flexibility
Interactivity
Full service/all-inclusive
New event formats
Cost saving
Programs with added value
Customised events
Greater comfort/relaxation

Basis: EITW, provider and organiser questionnaire:
Which additional trends do you consider important? (free text field)
Provision for mobility is popular

A large number of German organisers use ticket offers for events

Accessibility is the most important requirement for a decision on location by organisers.

Basis: EITW, organiser questionnaire: Companies/associations: Do you provide (sustainable) offers for the arrival and departure of participants in cooperation with transport companies? How much are they accepted? Agencies: Do you provide (sustainable) offers for the arrival and departure of participants in cooperation with transport companies and convey them to your customers? How much are they accepted?
Events sector with different challenges with providers and organisers: data security

Data security IS an issue, much more so with organisers than with providers

Basis: EITW, provider and organiser questionnaire: Where do you see the biggest challenges for the event market right now?
Challenge – further training for staff

In addition to further training, providers are occupied with the responsibility of staff recruitment.

Basis: EITW, provider and organiser questionnaire: Where do you see the biggest challenges for the event market right now? (questionnaire, free text)
Challenges in the events market

- shorter preparation times with events
- over-supply of events venues
- falling budgets
- cost minimisation for organisers
- fair prices
- attractiveness/emphasising particularities
- compliance
- corporate social responsibility/sustainability
- price dumping
- price flexibility
- being distinguished amongst the many
- competition
- staff recruitment
- rising costs

Basis: EITW, provider and organiser questionnaire: Where do you see the biggest challenges for the event market right now? (free text field)
2014 positive predictions for Europe

Very positive predictions by organisers in Europe and across the world. The international market provides high potential for German providers.
Women’s quota: Meetings market as an exemplary sector

* Germany: Women-on-Board-Index 2014 | ** Events market: meeting and event venues and agencies in Germany

Basis: EITW, provider and organiser questionnaire: What is the percentage of female management in your company on the board/management/executive level.
Meetings industry – positive, stable at a high level – including in the future.

Germany as a destination for meetings means accessibility, variety, service and price performance.

Meetings and events are becoming more international.

Challenges in the market relate especially to staff, events and technology.
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