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Frankfurt, 20th May 2014
Press Information

Meeting & EventBarometer 2014: Market Information

Growing internationality of meetings and larger budgets

German meetings industry – still growing

Frankfurt am Main, 20 May 2014. The German meeting and events market continues to grow: German meeting and event venues counted 371 million participants last year, 2.5% more than the year before. Since 2009, visitor numbers have been growing continuously. The number of events, 3.01 million meetings, conferences and events, was 1.3% above the result for the previous year.

The increased demand is matched by increased supply: 7,034 meeting and event venues were available in 2013, 1.4% more than the previous year.

This is a key result of the Meeting & EventBarometer 2014. The study, which is carried out annually, is the only one in Germany that examines both the conference and events sectors. The initiators are the European Association of Event Centres (EVVC), the German Convention Bureau (GCB) and the German National Tourist Board (GNTB). The study was carried out by the European Institute for the Meetings Industry (EITW).

Meetings and conferences are the engine of the business travel sector

The positive results in the German meetings and events sector is also reflected in the current World Travel Monitor business travel figures from IPK International: "In 2013 promotable business trips, i.e. visits to meetings, conferences and fairs as well as incentive journeys, were substantially higher than traditional business trips from Europe. The meeting and event market is becoming more and more a driving factor for business tourism to Germany," says Petra Hedorfer, Chair of the Board at GNTB, emphasising the results of the current Meeting & EventBarometer.
More and more participants from abroad

The long-term analysis of the Meeting & EventBarometer, which has been operating since 2007, has also identified a growing internationalisation of the meeting and event market in Germany: from 2006 to 2013 the number of foreign participants increased from 14.3 to 23.4 million. Furthermore, 38% of German providers and 45% of German organisers questioned in the study believe that the importance of international meetings will continue to grow in the future.

These results of the Meeting & EventBarometer are confirmed by the current ranking of the International Congress & Convention Association (ICCA): with 722 international association meetings in 2013, Germany takes first place for the 10th time in succession in Europe and second place in the worldwide comparison.

"The internationalisation of the meeting and event market is an important trend and it provides major growth opportunities for the sector in Germany. This is addressed by the German Convention Bureau (GCB) which positions Germany as the leading conference and meeting destination with marketing campaigns in all important source and growth markets", comments Matthias Schultze, Managing Director at the GCB.

Budgets are growing– especially in Europe

A further positive long-term trend for the meetings industry: organisers are being given increased budgets. Whereas in 2007 just under a quarter (23%) of all planners had more than € 500,000 available, in 2013, 45% of organisations state that they are able to pay more than half a million Euros for meetings, conferences and events. The outlook is positive: 79% of German organisers and 84% of international organisers expect their budgets to grow or at least remain the same in 2014 relative to 2013, according to the Meeting & EventBarometer 2014. European organisers have a particularly positive view of the future: 88% of those questioned expect higher or equal budgets. 95.7% expect to put on the same number of events or more in 2014 as compared with 2013.
"The meeting and event market is growing and German providers are well set up in the international market on account of their high quality services and good price/performance ratio. In order to maintain this position, suppliers need to make investments, “ says Joachim König, President of the EVVC. “The results of the Meeting- & EventBarometer provide an important overview as to which issues will influence the sector in the future and which services will create important competitive advantages.”

Meeting & EventBarometer: Germany

The Meeting & EventBarometer is the only study that researches the entire German meetings market – including conferences as well as other events – and provides a meaningful in-depth analysis of the industry. The initiators of the study are the European Association of Event Centres (EVVC), the German Convention Bureau (GCB) and the German National Tourist Board (GNTB). In 2014 these partners commissioned the European Institute for the Meetings Industry (EITW) to place the meetings market under the spotlight again for the eighth year in a row.
Press Information

Meeting & EventBarometer 2014: Image

Germany’s image as a country for meetings - first place again

International organisers associate Germany as a destination for conferences with a high degree of professionalism and perfection.

Frankfurt am Main, 20 May 2014. As a meetings destination, Germany has taken first place again in terms of popularity among international organisers as a preferred meeting location – ahead of the USA and Spain. In this way Germany has once again maintained its outstanding image in the international comparison in 2013.

This is a key result of the Meeting & EventBarometer 2014 - the authoritative study on the events and meetings market in Germany. The study, which is carried out annually, is the only one in Germany that examines both the conference and events sectors. The initiators are the European Association of Event Centres (EVVC), the German Convention Bureau (GCB) and the German National Tourist Board (GNTB). The study was carried out by the European Institute for the Meetings Industry (EITW).

Good accessibility

The study also highlights an advantage that many people believe the country possess as a location for meetings - it is quickly and conveniently accessible. Those questioned also highlighted the high-quality service, the attractive price/performance ratio as well as the broad range of event venues and hotels.

Matthias Schultze, Managing Director of the GCB explains: "Even in times of rising budgets, the price/performance ratio is the fundamental criterion for selection of a meeting and event venue alongside the good transport connections and the economic and scientific establishments at a location. This is where Germany is particularly well-placed in an international comparison."

Media contact: GCB German Convention Bureau e.V.;
Ute Stegmann, Kaiserstr. 53, 60329 Frankfurt
Tel: 069-24293013; Fax: 069-24293026; e-mail: stegmann@gcb.de
Connotations for organisers: "professional" and "well-organised"

When asked what words international organisers associate with Germany, the results are particularly interesting: the most frequently used terms include "professional", "perfection" and "well-organised"; the next most important features are the position and accessibility, followed by variety, quality, reliability and again a good price/performance ratio.

"The research with international organisers shows that German providers are associated with professionalism abroad. This is a competitive advantage that we need to further develop and communicate intensively", comments Joachim König, President of the European Association of Event Centres.

Large German cities with constant popularity

The hierarchy of the ten most popular German destinations for meetings has remained relatively constant: Berlin still leads followed by Munich, Frankfurt, Hamburg and Cologne, according to the organisers questioned. Düsseldorf, Stuttgart, the trade fair city of Hannover as well as Nuremberg are once again in the top ten. A new inclusion is Leipzig in ninth place.

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Press Information

Meeting & EventBarometer 2014: Themes and Trends

Meetings and events sector meets challenges

Focus on technology and sustainability

Frankfurt am Main, 20 May 2014. In order to maintain its outstanding position in worldwide competition, the German meetings sector must address current issues and challenges and react promptly to trends. The Meeting & EventBarometer 2014, the key study on the meetings and events market in Germany, has asked providers and organisers questions relating to the most important issues and can thereby present an in-depth account of the mood in the sector.

The study, carried out annually, is the only one in Germany that examines the conference, meetings and events sectors. The initiators are the European Association of Event Centres (EVVC), the German Convention Bureau e.V. (GCB) and the German National Tourist Board. (GNTB). The study was carried out by the European Institute for the Meetings Industry (EITW).

Megatrends

With the support of the EVVC and other partners, the GCB has commissioned the Institute for Future Studies and Technology Assessment to evaluate current megatrends as well as their future development up to 2030 with regard to the meetings and events sector. One result of the study published at the end of last year, “Meetings and Conventions 2030: A study of megatrends shaping our industry”, is the identification of eight megatrends that have outstanding impact for the sector in the long-term. Three of these subjects are examined in greater detail in the Meeting & EventBarometer.

Technologisation of work and life

Looking at the megatrend of technologisation, approximately two thirds of providers (63%) and organisers (65%) believe that cloud services will play an ever more important role in organisation and management of events. Further trends are the inclusion of social media as well as hybrid meetings.
Sustainable development
The issue of sustainability will continue to have existential significance for the meeting sector in the future. 82% of providers and 66% of organisers feel certain that the importance of including sustainable components will increase further. The reduction and compensation of CO2 emissions has been emphasised above all here. The Germany stand at IMEX, from 20 to 22 May 2014 in Frankfurt, is also set up on a sustainable basis. For example, the GCB will balance the entire CO2 emissions relating to the stand together with CO2OL, Forest Finance Service GmbH.

New event formats
It is becoming increasingly common for traditional organisation formats for meetings and conferences to be supplemented by alternative forms. Nearly half (45%) of providers and 62% of German organisers believe finding and implementing novel meeting and event forms is an important challenge for the meetings and events sector. More flexibility in the organisation as well as greater integration of interactive elements should increase the intensity of the exchange on all levels and provide visitors with genuine added value.

"The results of the current Meeting & EventBarometer supplement and enhance the approaches of the study commissioned by the GCB 'Meetings and conferences of the future'. Further important impetus will come from the second Meeting Experts Conference (MEXCON) initiated by GCB and EVVC which takes place from 11 to 13 June 2014 in Berlin. The main subject of this dialogue-based event is the future capacity of the meetings and events sector", comments Matthias Schultze, Managing Director at GCB.

Current themes

Mobility
The easy accessibility of meetings and events is the most important competitive advantage for Germany as a location for meetings. Organisers' responses to questions indicate a high demand for special promotions around travel, both for the outbound journey and the return journey in addition to mobility at the location arranged in co-operation with the relevant transport providers. Two thirds (66%) of German organisers have special train tickets in the programme while 40% offer their customers event-based air tickets. In the case of 53% of organisers, the conference tickets for local public transport are part of the service. Consequently, mobility is regarded more and more as part of the event service.
Further training for staff
Employee training is regarded as another challenge for the sector by 44.1% of providers and 38.5% of organisers. "The demographic change leads to a skills shortage in a large number of industrial sectors – including the events sector. This is an area where we can and must address the situation with family-friendly working options. Regular further training for employees also helps to maintain the high standards of our services", explains Joachim König, President of the EVVC.

Data protection
Linking with the technologisation megatrend, organisers in particular see a major challenge in data protection: Over half (56.3%) believe there is a need for action in this area. Only 36.1% of providers agree with this.

Percentage of women in management levels
When it comes to the proportion of women employed in the industry, the meetings and events sector is well set up: with women accounting for 16.2% of management positions, the sector is significantly above the German average of 6% (according to the Women-on-Board-Index 2014). The proportion of female directors in agencies is particularly high - 30.3%.

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Press Release

**Meeting & EventBarometer 2014: Methods and Classification**

**Background and special nature of the survey**

Frankfurt am Main, 20th May 2014. This is the eighth time that the European Institute for the Meetings Industry has conducted the Meeting & EventBarometer for the German meeting and event market. The comprehensive survey analyses this important segment on behalf of the European Association of Event Centres (EVVC), German National Tourist Board (GNTB) and German Convention Bureau (GCB).

**Special nature of the Meeting & EventBarometer**

The Meeting & EventBarometer is the only survey to examine the *entire meetings and events market* – including both the conventions and special event segments - in Germany and provide an insightful picture of the industry. It differs significantly from all other surveys that only focus on one aspect. The Meeting & EventBarometer provides up-to-date facts and figures but also highlights directional trends and developments.

**Database and methodology**

Around 7,000 suppliers (convention centres, meeting hotels and special venues with at least 100 seats in the largest hall (theatre-style seating) in Germany and approx. 8,000 organisers of meetings and events (companies, associations and agencies) world-wide were interviewed via web-based questionnaires in March 2014. On average the questionnaire return rate was 4.4 per cent providing the industry with valuable results and conclusions.
Portrait

European Association of Event Centres

The Professional Network for the Events and Meetings Industry

Frankfurt am Main, 20th May 2014. The event and meetings industry feeds off its infinite versatility - represented by the European Association of Event Centres (EVVC). More than 700 event centres, congress locations, arenas and special event locations across Germany, Austria, Switzerland and neighbouring European countries are represented by the EVVC. Among the extraordinary members are event and meeting planners from the areas of congress services, concert and sports event management. These are the customers of its approximately 340 ordinary member companies. In excess, 60 supplier companies from the event industry currently support the association and its members as partners. By doing this they complement the communication-network in an ideal way.

The main tasks of the EVVC are to inform, provide counsel for and facilitate its members within a professional networking framework, whilst at the same time offering an ideal communications platform. Aside from offering practical support in marketing, legal and technical matters as well as compiling sector specific key figures, another focus of the EVVC is on training and education within the sector, and further developing the subject area of Green Meetings.

With its office in Berlin, EVVC works to represent the meetings and events industry as a whole within the political arenas of Berlin and Brussels. EVVC aims to inform on and influence any emerging proposed laws and always doing so in the best interest of its members. Furthermore the EVVC supports its members by providing significant key-data and research results to be used for argumentation in local political panels. 

More information: www.evvc.org

EVVC-Geschäftsstelle / Head Office
Eschersheimer Landstraße 23, 60322 Frankfurt am Main
Tel: +49(0)69-915096980, Fax: +49(0)69-915096989
E-Mail: info@evvc.org
Internet: www.evvc.org
Portrait

GCB German Convention Bureau e.V.

Marketing Germany as a meeting and convention destination

Frankfurt am Main, 20th May 2013. The GCB German Convention Bureau's role is to maintain and build upon Germany's international standing as a leading, sustainable meeting and convention destination.

As a driving force behind innovation in the meeting and convention industry, the GCB offers its members high-quality market research data. By developing marketing activities aimed at specific target groups, the GCB has become well-established both internationally and domestically and supports its members and partners in promoting their services.

The GCB’s more than 200 members represent 450 suppliers including leading hotels, convention centres, destinations, event agencies and service providers of the German meetings and conventions industry. As strategic partners, Lufthansa German Airlines, Deutsche Bahn AG (German Railways), and the German National Tourist Board support the work of the GCB.

The GCB is a strategic partner of IMEX, a contact for exhibitors and visitors in Germany and organiser of the GCB German seminar days. As the largest exhibitor at IMEX, the GCB presents over 230 exhibitors at the Germany stand (F100) focusing on Germany`s key industry sectors, sustainability, future and innovation.

Further information and press releases about the GCB German Convention Bureau e.V. at: www.germany-meetings.com.

GCB German Convention Bureau e.V.
Kaiserstr. 53
60329 Frankfurt/Main
Tel: +49(0)69-2429300, Fax: +49(0)69-24293026
E-Mail: info@gcb.de
Internet: www.germany-meetings.com
Twitter: http://twitter.com/GermanyMeetings
Portrait

German National Tourist Board (GNTB)

Innovative marketing in Germany and abroad

Frankfurt am Main, 20th May 2014. The German National Tourist Board (GNTB), based in Frankfurt am Main, is the national “tourist board” of Germany. With its marketing and sales work, it pursues two objectives for Germany as a tourist destination: strengthening the country’s international reputation as a travel hotspot and the promotion of tourism into Germany. The GNTB works on behalf of the Federal Ministry of Economic Affairs and Energy from which it receives its funding under a resolution passed by the German parliament. The GNTB maintains a presence worldwide with 30 GNTB sales outlets. Through its presence in all relevant markets, the GNTB has precise expertise regarding market-specific characteristics.

Synergy through networking and “public private partnerships” are the fundamental concepts of the GNTB. It advises its partners on the preparation of customer-oriented offers that are attuned to the market. It secures international organisers, markets the products in cooperation with travel agents abroad and addresses end consumers in foreign source markets. Additional important sales tactics of the GNTB are its presence at trade fairs worldwide, the organisation of its own road shows in foreign markets and study trips for international media representatives and travel experts. The GNTB serves as the central contact for the media, the travel industry and the business world; it acts as the interface for contacts and information, for market expertise and know-how.

Through its website, www.germany.travel, available in 30 different languages, the GNTB is the global leader for online travel information for the holiday destination Germany. The international target groups are consumers, press, tour operators and disseminators. The GNTB’s information is optimised for conventional websites, smart phones and tablet PCs.

German National Tourist Board (GNTB)
Beethovenstraße 69
60325 Frankfurt am Main
Tel. +49(0)69-97464-262, Fax +49(0)69-974 64-233
E-mail presse@germany.travel, Internet www.germany.travel
Portrait

European Institute for the Conference Industry (EITW)
Specialists in MICE market research and convention consulting

Frankfurt am Main, 21st May 2013. The European Institute for the Conference Industry (EITW) specialises in conducting cutting-edge analysis on areas of innovation in the meeting, incentive, convention and event management (MICE) sector.

The EITW offers user-friendly online products for market research in the meetings and events sector; for example, the "Meeting & Event Barometer" focusing Germany or the "meeting barometer" covering individual states, cities and regions.

In the area of conference marketing, destinations benefit from operational and strategic recommendations developed by the EITW. Furthermore, the institute provides advice on the construction of new convention bureaux, also making suggestions regarding their financing and staffing.

The institute, based at Harz University, is also involved in academic research on conferencing and meetings, looking into economic, ecological and social issues (for example, the economic power of congresses and meetings, the sustainability of meetings and the role of women in the meetings and events sector).

The EITW carries out research into the German and European conference and meeting market, while co-operating with umbrella organisations and professional associations and maintaining strong relationships with scientific institutions world-wide. In recent years, the institute has worked successfully with over 90 customers and project partners from inside and outside Germany.

Europäisches Institut für TagungsWirtschaft GmbH a. d. Hochschule Harz
Friedrichstraße 57-59, 38855 Wernigerode
Tel: +49(0)3943-659-268
Fax: +49(0)3043-659-299
Internet: www.eitw.de