Meeting- & EventBarometer
Meeting- & EventBarometer
Germany 2016/17
The Germany study of the conference and events market
The Authors

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Glossary

Event venue types:

**EC = event centres**
Event centres include conference centres, sports and multi-function halls, arenas as well as community centres built for events which do not provide any overnight accommodation.

**MH = meeting hotels**
Meeting hotels provide overnight accommodation in addition to conference facilities.

**EL = event locations**
Event locations include particular venues that were originally constructed for a purpose other than the event. This includes, for example, castles/palaces, museums, factory buildings/locomotive sheds, studios, leisure parks, educational facilities/colleges, airports etc.

Event types:

**Professionally motivated events:** Meetings and events with a business background, e.g. conferences, meetings, seminars and workshops as well as university events, corporate promotions and company galas.

**Events:** Events for the purpose of entertainment and leisure, e.g. social and cultural events, sports events and festivities, banquets and jubilees.

**International events:** Events with at least 10% foreign participants.

**Local events:** Meetings of local groups and associations.

**Social events:** e.g. social programs, dinner and evening events (events that are an element of a larger, primary event, e.g. a conference).

**Festivities:** e.g. jubilee celebrations, banquets, weddings, company celebrations, parties (independent events not related to another event).

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

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.
Introduction

The Meeting- und EventBarometer, which is carried out annually, is the only study on the events market in Germany that examines both the conference and events sector. The study was initiated by the Europäischer Verband der Veranstaltungs-Centren e.V. (EVVC), the GCB German Convention Bureau e.V. and the Deutsche Zentrale für Tourismus e.V. (DZT), which commissioned the European Institute for the Meetings Industry (EITW) to carry out the study for the eleventh time.
Methodology

Providers' responses in comparison with the actual market

Responses by event venue type:

- EL: 19%
- TH: 44%
- VC: 37%

Supplier market Germany

- EL: 30%
- TH: 46%
- VC: 24%

Over 4,000 event venues with a minimum seating capacity of 100 were questioned across the whole of Germany as part of an online survey in February/March 2017. The response rate of those approached was 12.7%. The volume and structure of the event market are represented by the provider survey. From the provider side, adequate data is available to facilitate valid statements in relation to all three types of event venues.

Basis: EITW, provider questionnaire and in-house research 2017
01 MARKET INFORMATION
Demand at a high level with relatively stable supply.
Approximately 394 million participants – an increase of 0.4% relative to the previous year – took part in 3.02 million meetings, conferences and events in German event venues. The number of events indicates a decrease of 1.5%.
On the supply-side there are 7,313 event centres, conference hotels and event locations each with seating for at least 100 people in the largest room which indicates an increase of 1.5% relative to 2016.
Market information

1.1 Supply side: event venues

The supply-side for meetings and event venues increased in 2016 by 1.5%. The growth here with an increase of 3.1% is mainly attributable to the event locations, although this is not expressed in the percentage breakdown of event venue types (30% of the overall market). With event locations, there were equivalent increases in the case of small, medium and large enterprises. Note: the conversion, for example, of old industrial sites to modern event and conference centres likewise leads to an increase in event venues of this type as, by definition, they are counted as event locations.

The meeting hotels have strengthened their market share of 46% with an increase of one percentage point at the expense of event centres. It is chiefly smaller meeting hotels that are responsible for the growth of 1.4%. The decreases in the number of event centres (-0.3 %) are mainly due to event venues with smaller capacities.

Breakdown of event venues according to type

Basis: EITW, in-house research 2017
The number of **days occupied** (calculated from event days plus days of inaccessibility) in 2016 was 170 which was just above the value for 2013 (165 days), whereby the proportion of days of inaccessibility was 25.2%, which was similar to the level in 2015.

When differentiated according to type of event venues, the event centres had 184 days of occupation, which was above the average and the proportion of **days of inaccessibility** was 32.2%, which is the highest amongst the event venue types. The rooms in the meeting hotels are occupied 160 days in the year on average, whereby the proportion of days of inaccessibility is the lowest at 16.1%. The event locations have 152 occupied days, whereby 24.6% of the time is required for setting up and dismantling.
1.2 Demand side: Participants, events, organisers

The participant numbers saw a slight increase in 2016, whilst the number of events is undergoing a slight decline.

<table>
<thead>
<tr>
<th>Year</th>
<th>Growth of events</th>
<th>Growth of participant numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007 to 2006</td>
<td>+6.0%</td>
<td>+8.0%</td>
</tr>
<tr>
<td>2008 to 2007</td>
<td>+0.6%</td>
<td>+1.0%</td>
</tr>
<tr>
<td>2009 to 2008</td>
<td>+10.9%</td>
<td>+4.8%</td>
</tr>
<tr>
<td>2010 to 2009</td>
<td>+9.4%</td>
<td>+6.9%</td>
</tr>
<tr>
<td>2011 to 2010</td>
<td>+1.2%</td>
<td>+4.5%</td>
</tr>
<tr>
<td>2012 to 2011</td>
<td>+9.2%</td>
<td>+7.2%</td>
</tr>
<tr>
<td>2013 to 2012</td>
<td>+1.3%</td>
<td>+2.5%</td>
</tr>
<tr>
<td>2014 to 2013</td>
<td>+1.0%</td>
<td>+3.3%</td>
</tr>
<tr>
<td>2015 to 2014</td>
<td>+0.7%</td>
<td>+2.6%</td>
</tr>
<tr>
<td>2016 to 2015</td>
<td>+1.5%</td>
<td>+0.4%</td>
</tr>
</tbody>
</table>
The overall trend in events of -1.5% is due mainly to the decrease in meeting hotels and event locations. In the meeting hotels, the decrease is relatively large: the smaller the enterprise, the greater the decline. Last year in the individual meeting hotels with less than 250 seats, there was an average decrease of 18%. The increase in the supply of meeting hotels is not sufficient to compensate for the decrease especially in the smaller enterprises. In 2016, the meeting hotels still held the most events, i.e. 54% (previous year: 59%); their proportion has been falling since 2014 (62%). In the event locations, there were small decreases relative to the previous year across all enterprises – from the smallest to the largest. Consequently, the proportion of event locations in all events decreased relative to the previous year only from 12 to 10%.

In contrast to this, the proportion of event centres increased by three percentage points to 36% relative to 2015. The event centres have seen good increases in 2016 overall, which are based largely on increases from 7 to 9% in enterprises with seating below 500 and above 1,000. In the very large enterprises (arenas), there is stagnation.
Market information

Participants

Participants according to type of event venue

- VC: 55%
- TH: 22%
- EL: 23%

The percentage distribution of participants in the market has not changed since 2015.

The event centres have the most participants owing to their large capacities. In the smaller establishments here, there have been increases of 3 to 6%; in the very large enterprises (from 4,000 seats) decreases of 2% have been recorded.

Numbers of participants in small and large meeting hotels have decreased by approximately 3%; in medium-sized establishments, the numbers have increased.

The overall increase in participants of 0.4% is mainly attributable to the large event locations with an increase of more than 15%. However, in the case of event locations with smaller capacities of around 1,000 seats, the increase in participants is considerably smaller and even stagnant in the smallest venues from 100 participants in the largest room.

Basis: EITW, provider questionnaire 2017: Total number of participants
Market information

International participants and events

International participants at events in Germany are increasing consistently.

The increasing internationalisation of the events market and the growing importance of events in Germany continued in 2016. The average proportion of foreign participants is now 8.8%, i.e. 32.9 million participants from abroad. This amounts to an increase of 18% relative to the previous year. The number of foreign visitors coming to events has more than doubled in the last eleven years (2006: 14.3 million).

The average value fluctuates depending on the type of event venue and is highest in meeting hotels, i.e. 11.1%.

The proportion of international events remains the same, i.e. 5.9% but is not increasing in proportion to foreign participants. The event locations have the highest shares of international events, i.e. 9.4%, followed by meeting hotels, i.e. 6.5%. 3.8% of events in the event centres are international.
By far the most important type of event at German event venues in 2016, was again the category **conferences, meetings and seminars**, which accounted for 57.7% and constituted an increase of more than 5.6 percentage points. They are mainly held in meeting hotels where they account for a share of approximately two thirds. **The proportion of conferences and meetings with an exhibition** is 15%, accounting for approximately 23% in event centres.

The proportion of **exhibitions and presentations** decreased slightly in relation to the previous year. This event type accounts for the largest portion in the meeting hotels (10.5%).

**Cultural and sports events** account for approximately a fifth of all events in event locations and are the second most prevalent event type in the event centres.

**Social events** mainly take place in the event locations and account for approximately 10% of all events here, followed by meeting hotels at approximately 8%.

**There are more local events** in event centres and meeting hotels than in event locations.

The **festivities** mainly take place in the event locations, where they are the third most prominent event type at 16.5%.
Market information

Types of events: professionally motivated meetings and events

The professionally motivated events include conferences, meetings and seminars as well as exhibitions and presentations. The other categories of event types can be summarised under the heading Events. With this simplified distinction, it is possible to provide a clear overview of the distribution according to business events and events of a recreational nature in the overall market and within the various event venue types.

The portion of professionally motivated events increased further in 2016 and amounted to 64.1% in the market as a whole. Professionally motivated events have been increasing again since 2014.

Professionally motivated events are predominant in the event centres with a figure of 62.1% and growth of 11.9 percentage points. Business events dominate in the meeting hotels (here 75.7%). The event locations have the largest share of events, i.e. 57.7%, although there has been a distinct professionalisation of the event types relative to the previous year since the proportion of events in the previous year was 70.6%.

Distribution of professionally motivated functions and events

<table>
<thead>
<tr>
<th>Year</th>
<th>Professionally motivated events</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>66.6%</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>73.9%</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>71.4%</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>57.0%</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>54.5%</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>51.3%</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>56.6%</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>64.1%</td>
<td></td>
</tr>
</tbody>
</table>

Basis: EITW, provider questionnaire 2017: Number of events in event types
There has been a slight increase in the average number of participants at events. For the size categories of conferences, meetings and seminars, there have been decreases in the small and medium-sized categories (up to 500 participants) in 2016 relative to the previous year. Approximately 60% of events are attended by a maximum of 100 participants. The biggest increase occurred in the size category of 1001 to 2000 participants (+2.0 percentage points).

With the growing size, meeting hotels have a smaller share in the overall market for events. Event centres especially dominate in events for 1001 to 2000 participants and those with over 5000 participants. Relative to the previous year, they particularly increased their share in 2016 in events for 501 to 1000 participants (+11.4 percentage points).
1.3 FORECASTS
Forecasts

Booking situation in the current year

Providers were asked to assess the current bookings situation and the trend in the volume of events. Nearly all (86.4%) of providers believe that the trend in their own company will improve or remain the same. Consequently, the portion of providers with a negative assessment (13.6%) has increased overall relative to the previous year (8%).

Assessments of the bookings situation are different depending on the type of event venues. Although in the event centres only approximately 35% expect an improvement, the bookings position is the same for over half. Only around 10% anticipate a deterioration here. In the case of meeting hotels and event locations, the bookings situation is better for over 43% than in the previous year; however, 17% of meeting hotels and 19% of event locations complain about a deterioration relative to the previous year.

| Providers 2017 | 40% | 46% |
| Providers 2016 | 33% | 59% |

Basis: EITW, providers: What is your assessment of the bookings situation for events (2017) in comparison to 2016 in your event venue?
Forecasts

FORECAST of future trend in the events market

Estimation of the events market trend

<table>
<thead>
<tr>
<th>Providers 2017</th>
<th>Positive</th>
<th>Unchanged</th>
</tr>
</thead>
<tbody>
<tr>
<td>59%</td>
<td>37%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Providers 2016</th>
<th>Positive</th>
<th>Unchanged</th>
</tr>
</thead>
<tbody>
<tr>
<td>47%</td>
<td>45%</td>
<td></td>
</tr>
</tbody>
</table>

59.3% of providers questioned have a positive view of the future development in the meetings industry. Consequently, the estimation in relation to the previous year is much more positive since the proportion of positive estimations was previously 46.9%. Even the portion of negative assessments has decreased overall to 4%.

The forecast for overall development of the events market differs depending on the type of event venue. The estimation is most positive in the event locations. Here, 62.2% anticipate a positive development whilst the rest expect the situation to remain unchanged. In the case of meeting hotels, only 1.9% expect a deterioration in the market. In the case of function centres, 59% expect a positive assessment and 33.8% expect no change in the future.
Summary

Central results

- In the German events market, supply and demand continue to perform at a high level: in 2016, there were 3.02 million events with 394 million participants. This means a slight decrease in events with the minimal increase in participants.
- The supply of event venues increased by 1.5%.
- At the same time, the types of events have become more "professional". The portion of conferences, meetings and seminars increased by 5.6 percentage points. In the case of this type of event, the larger size categories have particularly increased.
- Nearly 60% of conferences, meetings and seminars are attended by a maximum of 100 participants. This portion has decreased relative to the previous year. There were decreases in the small and medium size categories but a noticeable increase in the size category of 1001 to 2000 participants, even with big events.
- The increase in large events is also reflected in the increasing internationalisation on the participants’ side. The number of foreign participants rose by 1.7 percentage points relative to the previous year to 8.8% (an increase of 18%). Since the start of the Meeting- & EventBarometer, the number of participants from abroad has actually more than doubled.
- The duration of events remains constant at 1.6 days.
- The predictions for the future are positive overall. Providers are very confident, both with regard to the booking situation in the current year as well as the future trend in the event market.
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