Meeting- & EventBarometer
Germany 2015/16
The Germany study of the meetings industry
Marketing information
GERMANY is a leading destination for meetings

1. USA
2. Germany
3. Spain
4. Great Britain
5. France
6. Italy
7. Japan
8. China
9. Netherlands
10. Brazil

1. Paris
2. Vienna
3. Madrid
4. Berlin
5. Barcelona
6. London
7. Singapore
8. Amsterdam
9. Istanbul
10. Prague

BUSINESS TRIPS by Europeans to Germany

- Incentives: 4% | 0.5 million
- Trade fairs/exhibitions: 23% | 2.8 million
- Meetings/conferences: 30% | 3.6 million
- Traditional business trips: 43% | 5.2 million

12.1 million business trips

Source: DZT/WTM, IPK 2016. Differences due to rounding up.
Trend in **BUSINESS TRIPS** to Germany since 2006

- **Incentives**: + 362 thousand
- **Trade fairs/exhibitions**: + 548 thousand
- **Meetings/conferences**: + 757 thousand
- **Traditional business trips**: -378 thousand

Source: DZT/WTM, IPK 2015. Differences due to rounding up.
MEETINGS INDUSTRY Supply situation

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>total</td>
<td>+0.8%</td>
</tr>
<tr>
<td>event centres</td>
<td>+1.0%</td>
</tr>
<tr>
<td>conference hotels</td>
<td>+1.0%</td>
</tr>
<tr>
<td>event locations</td>
<td>+1.5%</td>
</tr>
</tbody>
</table>

Basis: EITW, own survey and supplier questionnaire 2016: various enquiries
MEETINGS INDUSTRY Demand

- **Events**: +0.7%
  - **3.06 million**

- **Duration**: -0.01%
  - **1.6 days**

- **Participants**: +2.6%
  - **393 million**

- **Int. participants**: +0.4%
  - **7.1 %**

Basis: EITW, own survey and supplier questionnaire 2016: various enquiries

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TREND IN PARTICIPANTS AND EVENTS (MILLION)

Basis: EITW, supplier questionnaire 2007-2015: total number of events; total number of participants
TYPE OF EVENTS

- Conference, meetings, seminars: 52.1%
- Cultural and sports events: 4.5%
- Social events: 9.9%
- Local events: 8.9%
- Festivities: 8.9%
- Other: 8.4%
- Exhibitions, presentations: 7.3%

Basis: EITW supplier questionnaire 2007-2015: number of events in the event types
SIZE CLASSIFICATIONS

- 42.0% up to 50
- 21.3% up to 100
- 16.3% up to 250
- 10.4% up to 500
- 6.1% up to 1000
- 1.8% up to 2000
- 1.3% up to 5000
- 0.3% over 5000

Change:
- +0.5% up to 50
- -0.9% up to 100
- -0.3% up to 250
- 0.0% up to 500
- +2.3% up to 1000
- -0.5% up to 2000
- -0.3% up to 5000
- -0.8% over 5000

Basis: EITW, supplier questionnaire 2014 & 2015: number of events in the event types
GERMANY ahead of Spain and the USA

Place 1

Place 2

Place 1

Basis: EITW, organisers surveys 2016: preferred meeting destinations WORLDWIDE
EXPERTISE "Is there a sector specialisation in the MICE marketing of your destination?"

Providers

Organisers

74% 44%

29%

2012

Basis: EITW, supplier questionnaire 2016
Topics & Trends
Future study
Topics & Trends

- Technology
- Globalisation
- Mobility
- Sustainability
- Demography
Use of user-friendly TECHNOLOGIES is top priority!

**Providers**
- 84%

**Organisers**
- 90%

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Basis: EITW, provider and organiser surveys 2015
DOES TECHNOLOGY CHANGE EVENTS?

Hybridity changes

Face to face disappears completely

Face to face continues

Providers

Organisers

"very likely", "likely"

"quite unlikely" "unlikely"

Basis: EITW, provider and organiser surveys 2015
QUALITY EXPERIENCE as sales tactic for virtual events

Providers: 73% (very important)

Organisers: 84% (important)

Basis: EITW, provider and organiser surveys 2015
IS TECHNOLOGY DISPLACING EVENTS?

Virtual elements enhance reality
I would do virtual participation in an event
Events becoming paperless

"very likely", "likely"
"quite unlikely" "unlikely"

Basis: EITW, provider and organiser surveys 2015
Press conference | 19 April 2016 | © EITW 2015
SUSTAINABILITY
CERTIFIED ORGANIC FOOD is offered and requested...

Providers 34%  
Organisers 55%

Basis: EITW, supplier questionnaire 2016
"ORGANIC" BASED ON PERSONAL CONVICTION

Providers
Organisers

3 out of 4

Basis: EITW, supplier questionnaire 2016
REASONS FOR ORGANIC ... for further decision criteria applied to organisers

Organisers
- 59% Quality
- 51% Expectation
- 41% Directives
- 16% Other
- 6% Directives

Basis: EITW, supplier questionnaire 2016
SUSTAINABILITY: a high priority on the agenda

Providers: 83% very important
Organisers: 65% important
DEMOGRAPHIC CHANGE
WORK LIFE INTEGRATION not yet happened on the organisers' side

- Providers: 11%
- Organisers: 16%

Reason: Compliance not a reason

Basis: EITW, supplier questionnaire 2016
BUDGET PREDICTION

84% unchanged, increased

15.5% increased
26.7% unchanged
35.6% decreased
50.0% decreased
ORGANISERS' BUDGETS

10% up to 25 K €
15% up to 100 K €
23% up to 500 K €
20% up to 1 mil €
17% up to 5 mil €
10% over 5 mil €

Up to 25 K €
Up to 100 K €
Up to 500 K €
Up to 1 mil €
Up to 5 mil €
Over 5 mil €

Basis: EITW, organisers surveys 2016
Topics & Trends

FINANCING

- Other sources: 53.4%
- Fundraising, donations, sponsoring: 55.7%
- Accompanying exhibitions: 26.4%
- Participants' fee (congress fees): 47.2%
- Organiser's budget: 68.4%

Basis: EITW, organisers surveys 2016

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BOOKING SITUATION in the current year (compared with previous year)

Providers
- 33% positive
- 59% unchanged

Organisers
- 53% positive
- 37% unchanged
Topics & Trends

**PREDICTION** of future trend in the meetings industry

<table>
<thead>
<tr>
<th><strong>Providers</strong></th>
<th><strong>Organisers</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>47% positive</td>
<td>60% positive</td>
</tr>
<tr>
<td>45% unchanged</td>
<td>29% unchanged</td>
</tr>
</tbody>
</table>

Basis: EITW, supplier questionnaire 2016
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