

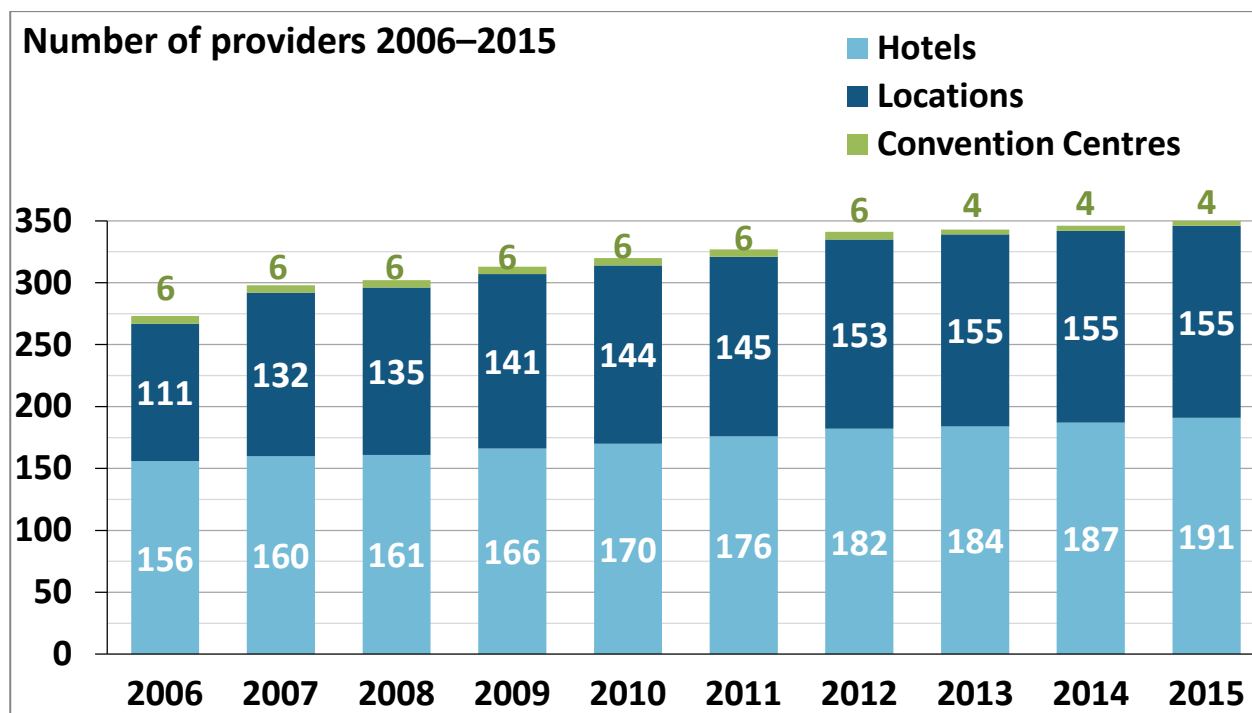
Convention Statistics 2015

convention.visitBerlin.de

Executive Summary

- Data about the Berlin MICE market was first collected in 2002. In the past 14 years, Berlin's meetings and conference industry has continued to grow and gain in significance.
- In addition to the city's growing position as a leading international destination for conventions and meetings, the German capital has become increasingly important as a centre for business and a top location for start-ups, facts which continue to drive the number of meetings, conferences and continuing education events held each year in Berlin. With the most start-up companies in Germany, Berlin is the country's start-up capital, with more than 2,500 start-ups in Berlin. According to an analysis by Ernst & Young, venture capitalists invested a total of €2.1 billion in Berlin start-ups in 2015; London's start-up scene, by comparison, only saw €1.7 billion in funding last year. (Source: Handelsblatt; January 2016) According to a McKinsey study, Berlin may well become the leading start-up capital in Europe by 2020, with the potential of 100,000 new jobs being created by start-ups. Approximately 40,000 of them would be in the start-ups themselves and additional 60,000 would be from the multiplier effect, where each new workplace creates the need for additional workers. Berlin is particularly considered a centre for IT start-ups and topics related to IT, digitalization, etc. are a growing area for meetings in Berlin. In 2015, more than fifty events addressing digitalization were held in the German capital. (Source: visitBerlin Press Release, 19.11.2015)
- Also, the hotel boom in the capital appears to be unabated: new hotel projects have been announced for 2016-2018 that will add another 4,000 rooms to the city's inventory.
- 2015 also represented another milestone for a major player in Berlin's MICE market: The Estrel, Europe's largest hotel, convention and entertainment facility, added another building for conferences. Convention Hall II provides an additional 10,000 m² of meeting space. Extending over three levels, the new Convention Hall II offers a plenary hall with 4,600 m² with space for 5,200 participants, a 1,050 m² hall offering room for 900, a foyer with 700 m², and four conference rooms for up to 100 people each, and three lounges. The entire Estrel Congress & Exhibition Center now has 25,000 m² available for conventions, meetings, special exhibitions, and events and can accommodate events for up to 12,000 visitors at a time.
- Since data began to be collected about the Berlin MICE market in 2002, the meetings and convention business in Berlin has seen very dynamic growth. The number of providers has increased from 245 in 2002 to 350 in 2015, representing an increase of 43%.

Steady increase in providers in Berlin: number of hotels, convention centres, locations

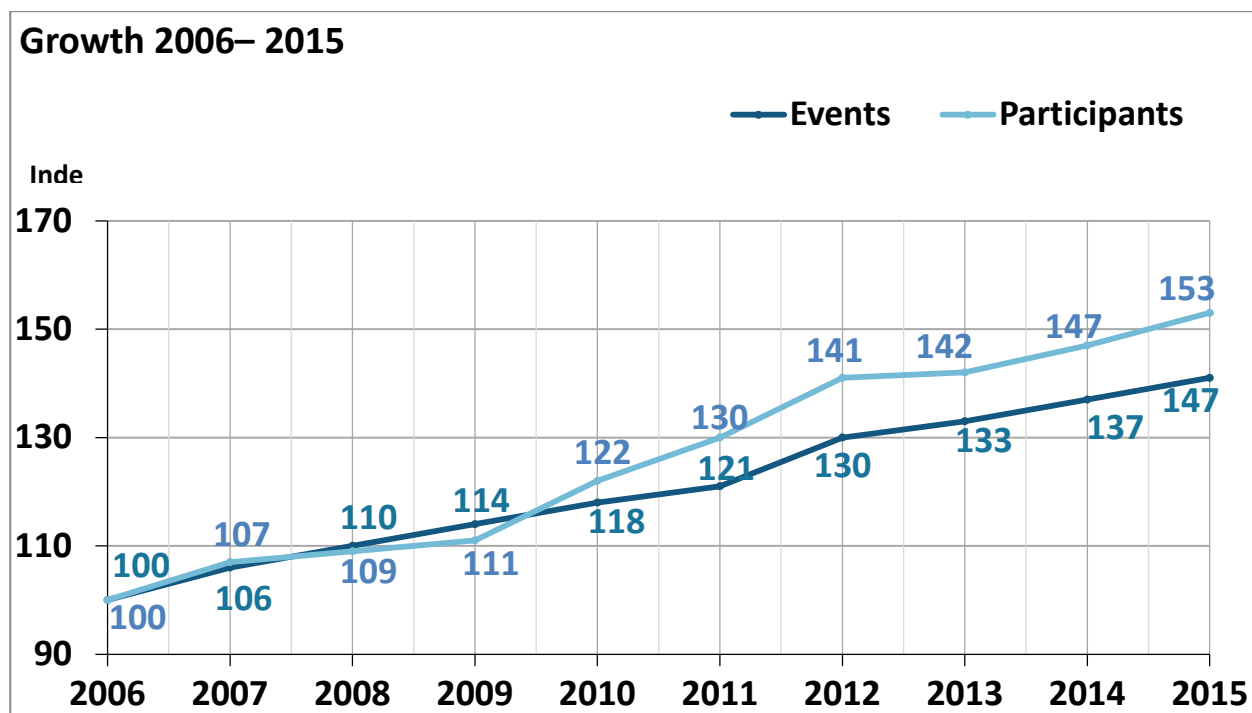


Source: ghh consult 2016 per congress-berlin.net

* Note: from 2013, two providers previously listed as convention centres are now classified as locations.

- The 350 providers counted in 2015 offer meeting space totalling approx. 498,000 m².
- The largest number of providers is made up by the 191 hotels on the list (equalling 55% of providers), that together offer about 136,000 m² of meeting space (27% of the total available space).
- The largest amount of space, however, is offered by the 155 unusual venues or locations (representing 44% of the providers) with 311,000 m² of meeting space (63% of the total).
- The four convention centres make up 1% of the providers, but provide around 51,000 m² (10%) of the available meeting space and are thus important pillars of the city's MICE sector.
- More than a third (36%) of the conference hotels and all of the convention centres participated in congress.net in 2015. They represent some 76% of the total space offered by Berlin venues of this type.
- Among other locations, 36 participated in congress.net, representing 55,000 m² of meeting space. They represent 18% of the space offered in this category.
- **In 2015, 135,100 events (+3%) were held, welcoming approximately 11.4 million participants (+4%)**
- The number of events has risen by 47% over the last 10 years, while the number of participants has risen by 53%.

Strong growth in event and participant indexes

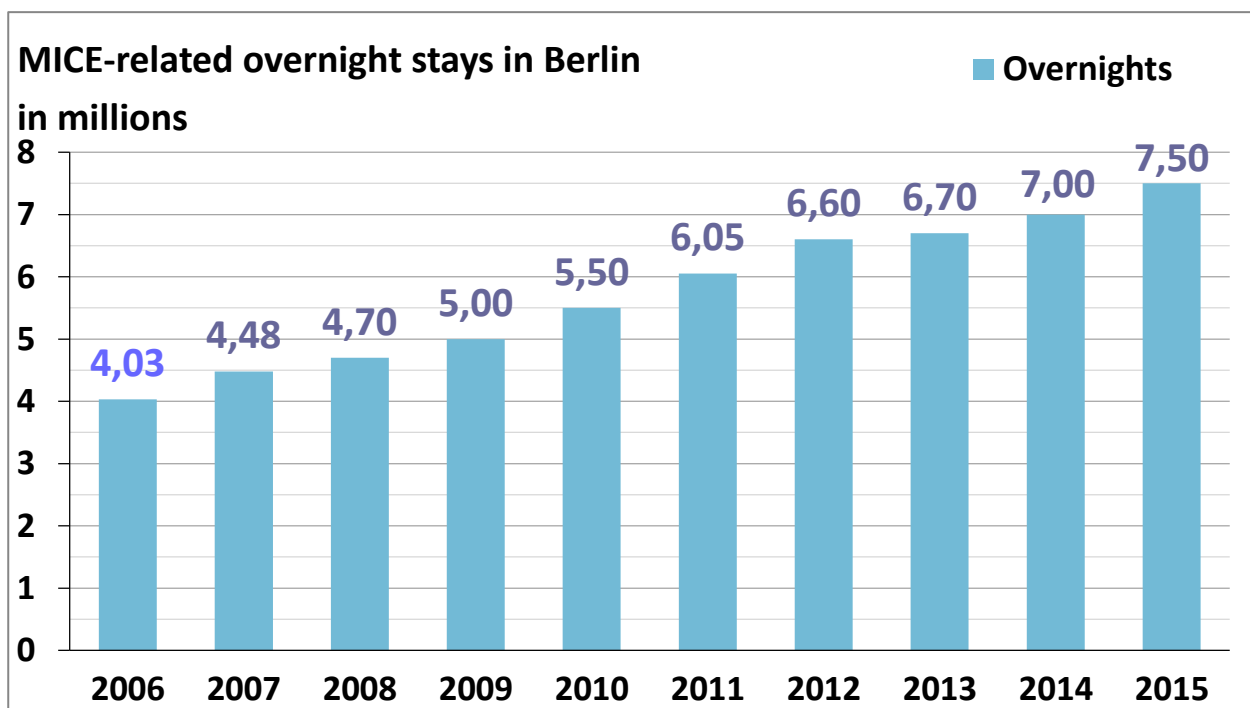


Source: ghh consult 2016 per congress-berlin.net

- A defining role in this is played by Berlin conference hotels:
they hosted 118,000 events (+3% over 2014) and some 6.81 million participants (+4% over 2014).
- The four convention centres held about 2,060 events in 2015 (+3%) with around 1.07 million participants (+4%).
- The approx. 15,040 events (+3%) at other locations in 2014 welcomed about 3.49 million participants (+4%).
- **Overall, it can be said that the convention market has seen strong growth in 2015** The consistent marketing activities of the BCO in the relevant markets, the attractiveness of Berlin as a MICE destination, and the good economic situation here were crucial drivers.
- The classification of events by size (number of participants per event) remained largely constant in 2015, with a slight shift in favour of larger events.
 - In 2015, the proportion of events with fewer than 100 participants was 84.6%, almost the same as the previous year (85.1%).
 - In 2015, the proportion of events with more than 1,000 participants was 0.5%, slightly above the previous year (0.4%).
- In 2015, the average number of participants per event in Berlin was 84, slightly below the average of 83 in the previous year.

- On average, events lasted 2.0 days in 2015 (1.9 days in 2014). 1.9 days) At the hotels, this figure was 2.1 days in 2015 (up from 2.0 in the previous year); at the convention centres, the average stood at 1.7 days (1.5 in 2014); and events at other locations lasted an average 1.3 days (1.2 in 2014). There is thus a slight trend towards longer events, further testimony of Berlin's attractiveness as a MICE destination.
- One-day events made up 61% of the events held in 2015, a drop from the previous year (63%); multi-day events, however, grew in 2015 (39% compared to 37% in the previous year).
- Conferences and meetings continued to dominate Berlin's MICE market, with such events accounting for 49% of the events in 2015 (50% in 2014), Events listed as conventions posted a slight increase with a share of 8% of events, up from 6% the previous year.
- The private sector once again took the lead in organising events in Berlin, being responsible for 69% of all events in 2014 (2014: 70%); whereas professional associations and other organisations were responsible for 23% (2014: 22%) of the gatherings. Public institutions, meanwhile, organised just 7% of the events in 2015 (2014: 6%).
- No changes in terms of who booked events were recorded: as in the previous year, 90% of all events in 2015 were directly booked, 9% were booked by PCOs, with the remainder booked by "other".
- The strongest industries or sectors based on the number of events were Medicine, science & research and IT, electronics, & communications with 12% each (both +1%), followed by political & public institutions, as one would expect for a national capital. At 10% each, the industries' "trade, banking, insurance", "chemicals, pharmaceuticals, cosmetics", and various aggregated under "services" were also strongly represented.
- The highest number of participants came from the medicine, science and research sector, which made up 16% of the total (previous year: 15%). Also the sector "IT, electronics, communications" reached a share of 12% for the first time, a share also reached by "political and public institutions".
- One fifth (20%) of Berlin's events in 2015 were international in character, a slight increase over the previous year (2014: 19%). About 2.3 participants came from abroad in 2015, representing almost one-fifth of the total.
- 40% of meeting participants came from the local region in 2015 (2014: 42%), while another 40% came from the rest of Germany (unchanged from the previous year). There was a slight increase in the share of participants coming from abroad: The importance and international appeal of Berlin as a MICE destination for science, business, culture and research, as well as the seat of the most important associations and organizations in Germany was once again reflected by the fact that 12% of participants came from the rest of continental Europe (11% in 2014), 4% from the United Kingdom (3% in 2014), 3% from the USA/Canada (no change) and 1% from other continents (also no change).
- **Berlin's meetings and convention market generated about 7.5 million overnight stays in 2015. This is an increase of approx. 7% over the previous year.**
- The number of overnight stays occasioned by meetings and conventions in Berlin has grown by more than 86% in the past ten years to 7.5 million in 2015. This demonstrates the importance of the MICE market to Berlin's hotel industry.

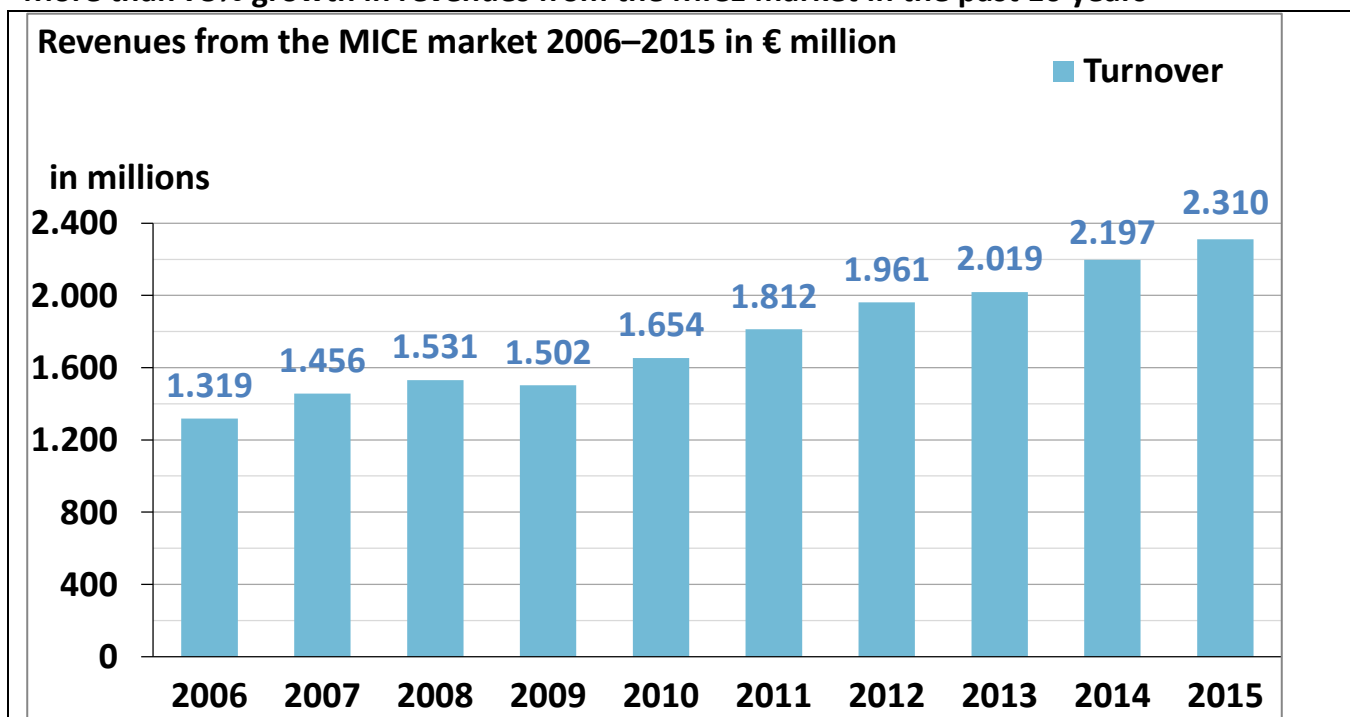
More than 86% growth in number of nights from the meeting and convention market



Source: ghh consult 2016 per congress-berlin.net

- The economic implications for Berlin are considerable. The revenues generated by people attending meetings and conventions equalled €2.310 billion in 2015, representing 5% year-on-year growth (2014: €2.197 billion)
- In the past 10 years, the revenues generated by Berlin's MICE market have risen by approx. 75%.

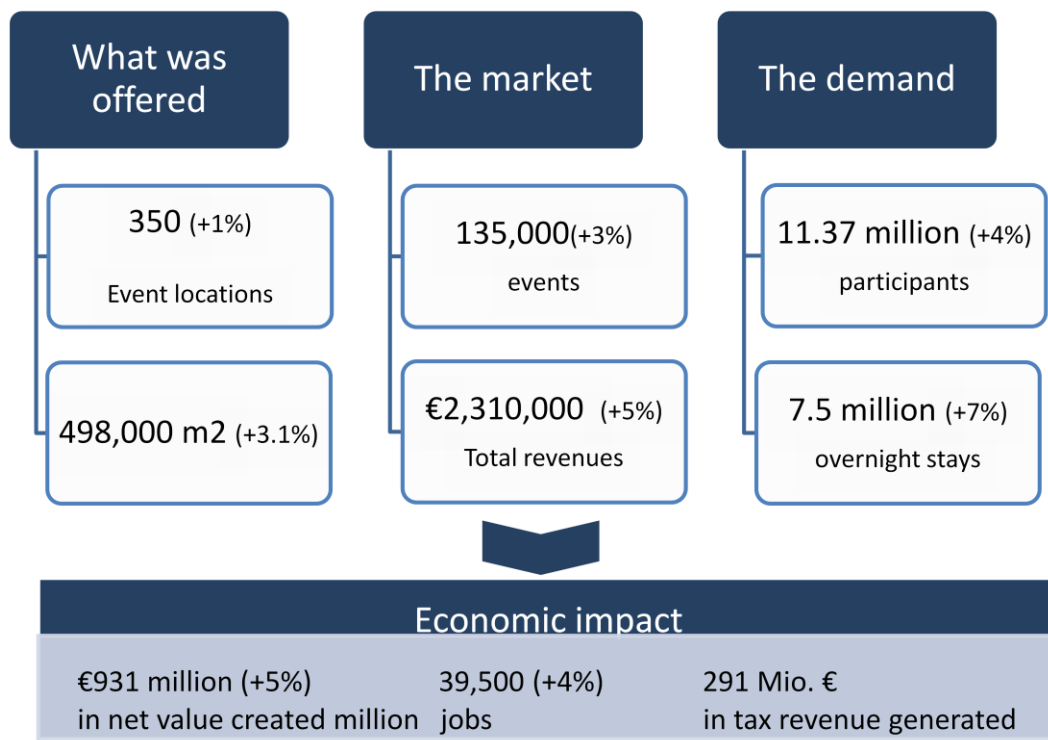
More than 75% growth in revenues from the MICE market in the past 10 years



Source: ghh consult 2016 per congress-berlin.net

- The **average amount spent by each participant** was about **€203** in 2015, up from €201 the year before.
- The number of full-time jobs attributable to the MICE sector in Berlin rose from 38,000 in 2014 to around 39,500 in 2015, representing an increase of approximately 4%.

Key figures for the Berlin conference and convention market in 2015



Source: ghh consult 2016 per congress-berlin.net

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