

Berlin Convention Statistics

Half-Year Report 2017

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1 Meetings and conventions: major economic driver for Berlin.

Meeting industry in Berlin: a success story for well over a decade

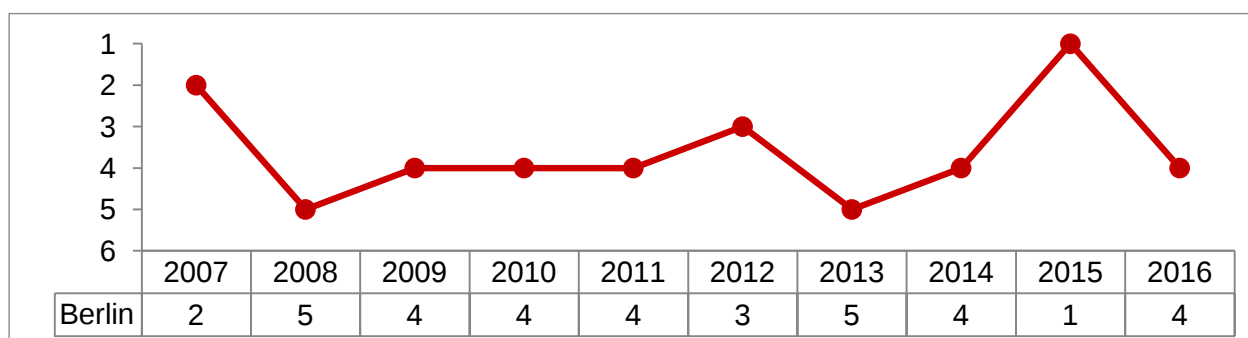
- Since 2001, Berlin's MICE market has developed very dynamically, indeed clinching the top ICCA ranking for the first time in 2015. The impressive growth in Berlin's meetings and conventions market is evident when comparing key statistics from the last 16 years:

Performance of the congress market in Berlin 2016 compared to 2001

	2001	2016	Change
Events	91,000	137,500	+51%
Participants	4.2 million	11.6 million	+176%
Overnight stays	2.27 million	7.70 million	+239%
Total revenues	€0.920 billion	€2.419 billion	+163%
Jobs	17,000	41,500	+144%

Source: Congress statistics 2001-2016 ghh consult

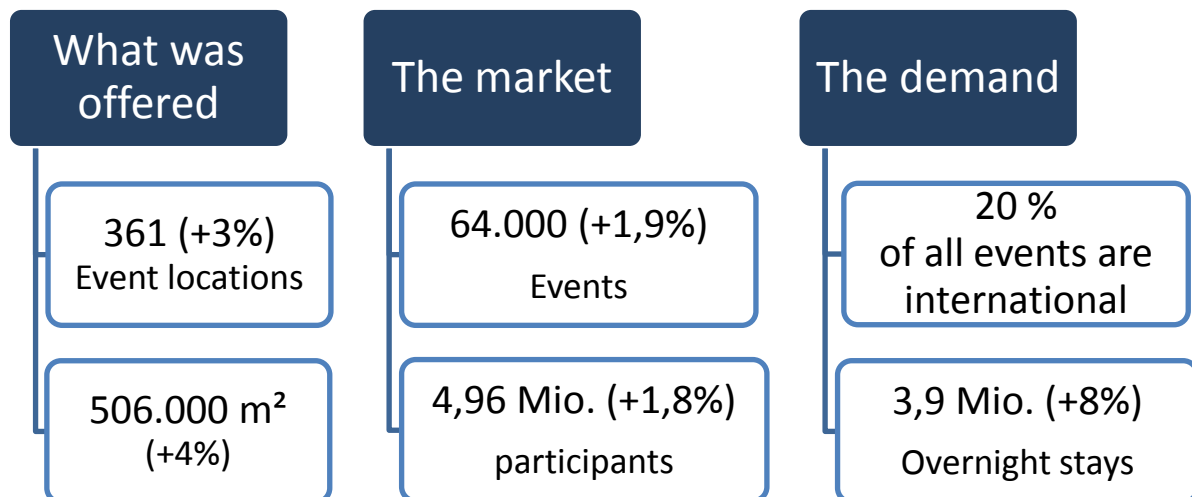
- The *visitBerlin* Berlin Convention Office (BCO) has played a decisive role in this growth since 2001. The BCO has brought more than a thousand European and worldwide conventions to the German capital.
- The ICCA ranking is one of the most important performance indicators in the meetings industry and has great influence on the awarding of many major congresses. Berlin can look back on an extraordinary success story: over the past 10 years, the federal capital has regularly been in the top 5 of the world's leading congress centres.



Source: www.iccaworld.org

2 Executive Summary

- Key figures for the Berlin conference and convention market in the 1st half of 2017
(comparison: 1st half of 2016)



Source: ghh consult 2017.

- In the first half of 2017, a total of **361 providers** in the congress market Berlin offered a total area of around 506,000 m².
- The providers are composed of 5 conference centres, city/multi-purpose halls, 199 hotels, and 157 locations. Since the re-launch of the online input system in April 2017, the Estrel Hotel & Convention Centre has been reassigned to the category of conference centres; accordingly it is no longer under the category "Hotels". The reason for this is the basic capacity expansion of the Estrel Hotel & Convention Centre, which now justifies the assignment to the service segment of the conference centres.
- In the first half of 2017, around **64,000 events** (+1.9%) with about **4.96 million participants** (+1.8%) were held. The number of events and participants was once again higher than the same period the year before, continuing to confirm the proven stability and continuity of the meeting and conventions market in the German capital.
- Through the conference and congress market in the first half of 2017 in Berlin, around **3.9 million overnight stays** (previous year: 3.6 million) were initiated; this means a sustained increase of 8% over the previous year.
- At 7,180 events (+2.1%) in the first half of 2017, about 1.41 million participants (+1.6%) were recorded in these locations.
- There was no significant change to the **event sizes** in the first half of 2017 compared to the same period in the previous year. Approx. 86% of Berlin's events have less than 100 participants. 0.3% of the events have more than 1,000 participants. Berlin could have a significantly higher demand potential here if there were corresponding additional supply capacities in the congress centre sector. Overall, the average event size in the 1st half of 2017 was 77 participants per event as with the previous year.

- The average **event duration** in the 1st half of 2017 compared to the same period last year was 2.0 days (previous year: +1.9 days).
- The percentage of **multi-day events** was somewhat higher in the first half of 2017 than in the same period of the previous year (37%), at 38%. This underscores the importance of the sector for the Berlin hotel industry. 62% of the events were therefore one-day events.
- Compared to the previous year's period, there were marginal changes: the type of event "**congress**" easily increased to 8.1% now (previous year: 7.8%). "**Conferences/conventions/meetings**" dominate the market with 49.2% (previous year: 49.3%); the "**further training/seminars**" also play an important role at 21.9% (previous year: 21.8%).
- The biggest organiser, with a percentage of 70% in the 1st half of 2017 was the "Corporate" segment (previous year: 71%); a good one-fifth (21%) of the events contributed, as in the previous year the "Associations/Organisations/NGOs", to the total volume in the Berlin conference and congress market. The percentage of "public institutions and politics" events increased by one percentage point compared to the previous year and was at 7% in the 1st half of 2017. The "Science" sector accounts for a share of at least 2% as the organiser in the Berlin congress market.
- A total of 89% of all bookings are made through the "Corporate", "Association/Organisation/NGO", "Public Institution/Politics", and "Science" sectors. 9% of bookings are made via "PCO/Agency"; 2% of all bookings are now available through relevant Internet websites.
- The leading industry cluster in the Berlin congress market is the medical/pharmaceutical/health care sector with a percentage of 20%. The political/public institution sector takes second place with 14%, followed by the IT/digital economy (13%), which is also very important for Berlin. The financial sector/insurance sector follows at 10%, and 8% for the media/communications sector.
- In the first half of 2017, about 20% of the **events** in Berlin had an **international dimension**, up one point from the previous year. The number of participants from abroad was around 993,000.
- At a good 80%, the majority of the organisers came from Germany. Approx. 20% of the events came to Berlin from abroad. This underlines the international appeal of Berlin as a MICE destination. Almost 15% of the organisers came from Europe, with Great Britain playing an important role here at 4.2%, and 10.5% of the organisers coming from the rest of Europe. The North American continent, with the USA and Canada, had a percentage of 3.1%.
- 10% of the events were accompanied by a trade show (previous year: 9%).
- In the first half of 2017, **approximately 3.9 million overnight stays** were initiated by the congress and conference market in Berlin. Compared to the previous year, this was a significant increase. (1st half of 2016: 3.6 million overnight stays).