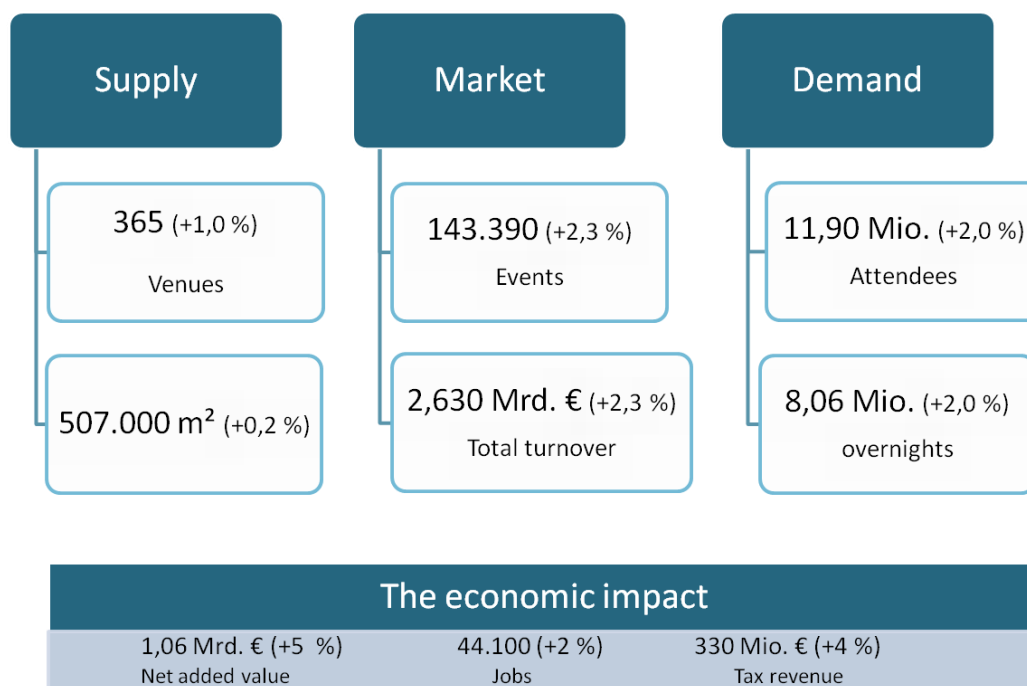


Convention Statistics Berlin 2018

convention.visitBerlin.de

1. Executive summary: key parameters and developments in 2018

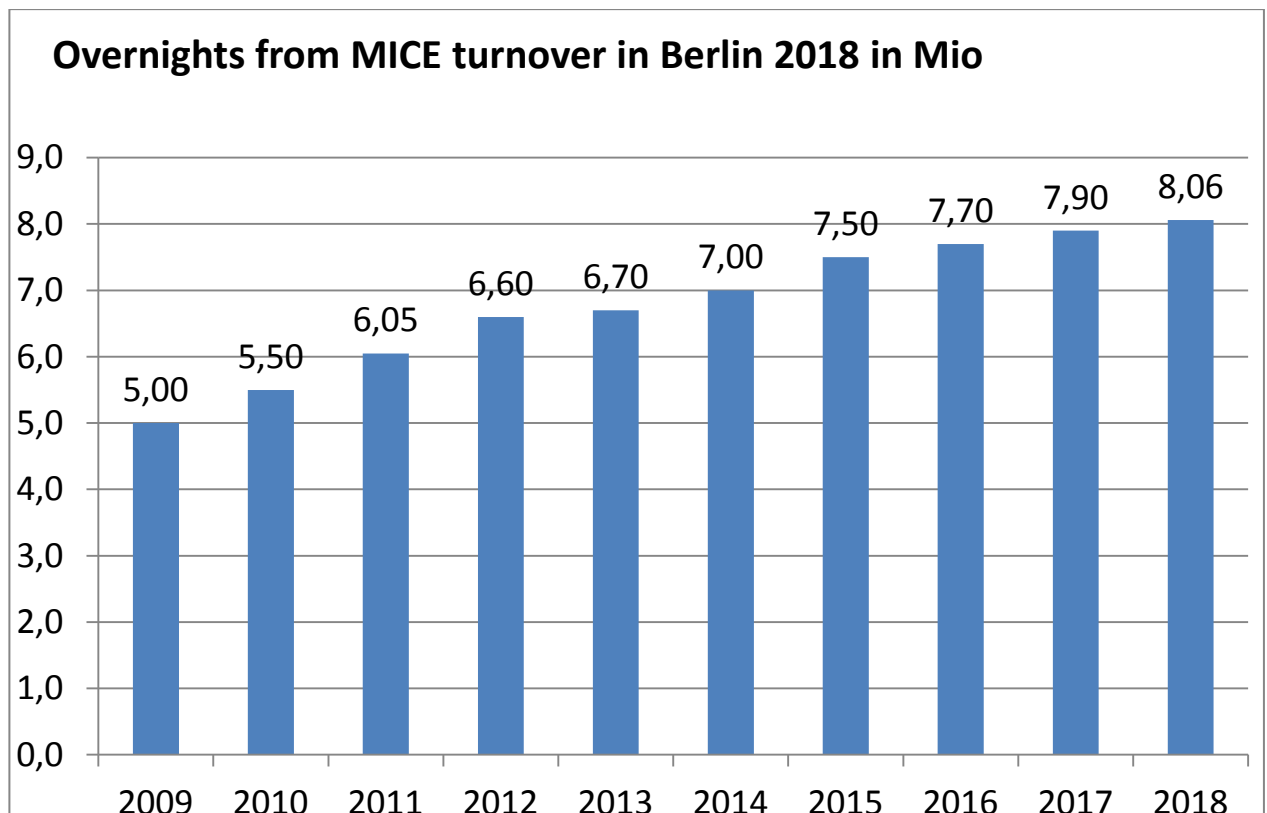
Key indicators in the Berlin conference and convention market



Source: ghh consult 2019 with reference to congress.net

- In 2018, **143,390 events** (+2.3 %) with around **11.9 million attendees** (+2.0 %) were held.
- **The number of events has increased by 32% over the last 10 years and the number of attendees by 44%.**
- As a result of the conference and convention market, around **8.06 million overnight stays** were generated in Berlin in 2018. This represents an increase of approximately 2.0% in comparison to the previous year.
- When compared over a 10-year period, this represents an increase of 61%. **This is an impressive demonstration of the importance of the MICE market for the Berlin hotel industry.**
- The **proportion** of the **MICE market** in **total overnight stays** in Berlin in 2018 was **25.2%**, almost unchanged from the previous year (25.4% in 2017).

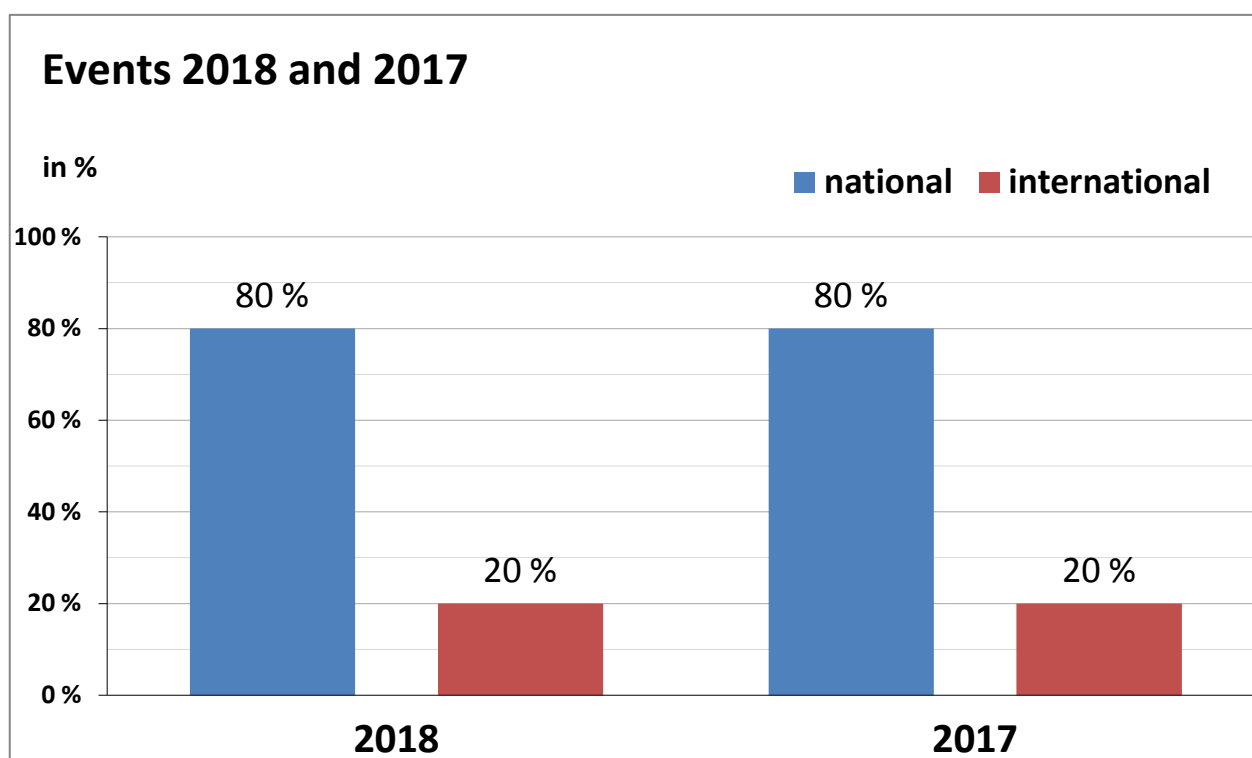
The number of overnight stays from the conference and convention market has risen by 61% since 2009



Source: ghh consult 2019

- The **leading industry cluster** in the Berlin convention market is the **medical, pharmaceutical and healthcare sector** with a proportion of **22%**. **Political and public institutions** rank second at **18%**, followed by the **IT/digital economy** segment which is also extremely important for Berlin (**12%**). This is followed by the financial and insurance sector at 11%.
- In **2018**, **20%** of the events held in Berlin **had an international character**. At 80%, the majority of organisers come from Germany. This underlines the international appeal of the MICE destination Berlin. **14.5%** of the organisers come **from Europe**, with **Great Britain** playing an important part at **3.9%** and **10.6%** coming from the **rest of Europe**. The North American continent with the **USA and Canada** accounted for **3.2%**. The *visitBerlin* Berlin Convention Office, with its representatives and corresponding marketing activities, is accordingly successfully engaged in the most important key markets.

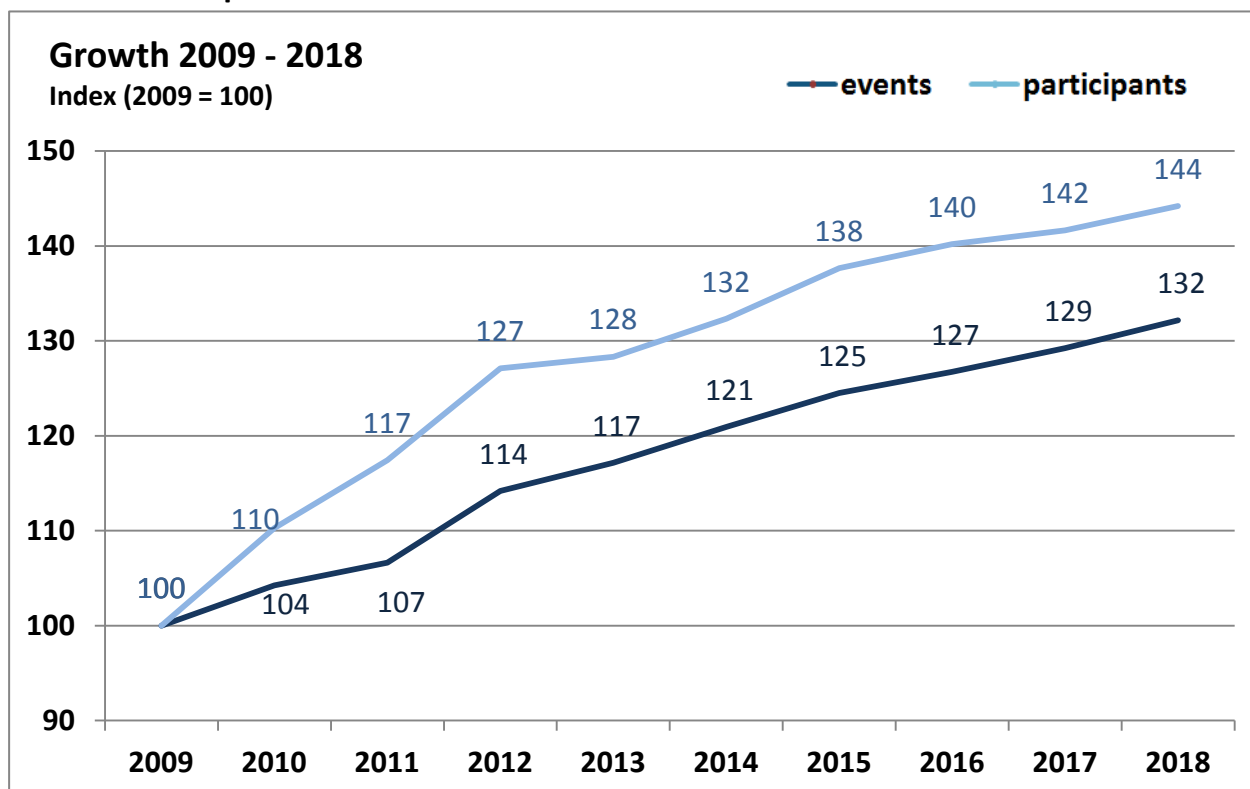
The proportion of international events was 20%



Source: ghh consult 2018 with reference to congress.net

- In this regard, Berlin's **conference hotels** play a decisive role:
131,073 events (+2.7% compared to 2017) were held, at which
5.44 million attendees (-4.1% compared to 2017) were registered.
- The **convention centres** held **9,241 events** (+8.7%) in 2018 with some **6.15 million attendees** (+9.2%). This represents an impressive increase in this category of providers. The rise with the convention centres and the decline in the hotel sector is due to the "Estrel Berlin - Hotel & Congress Center" hotel being included in the convention centre comparison group from 2017, but was still included in the hotel group in the online surveys in 2017. The need for a new, large convention centre in Berlin must be emphasised once again. **The capacities of the existing venues have been exhausted**; and in order to attract new large conventions for the federal capital, corresponding additional resources are required.
- In 2018, **3,076 events** (-26.1%) were held at so-called **locations**, at which approx. **362,000 attendees** (-9.5%) were registered. This clearly indicates that, in 2018, the demand shifted from locations to conference centres as well as the additional event capacities of the Estrel Berlin.
- **Overall, the Berlin conference and convention market has improved again in comparison to 2018.** The consistent marketing activities of the BCO in the relevant markets, the attractiveness of the MICE destination Berlin and the favourable economic environment in Germany, and around the world, were the decisive driving forces here.

Positive development in the number of events and attendees

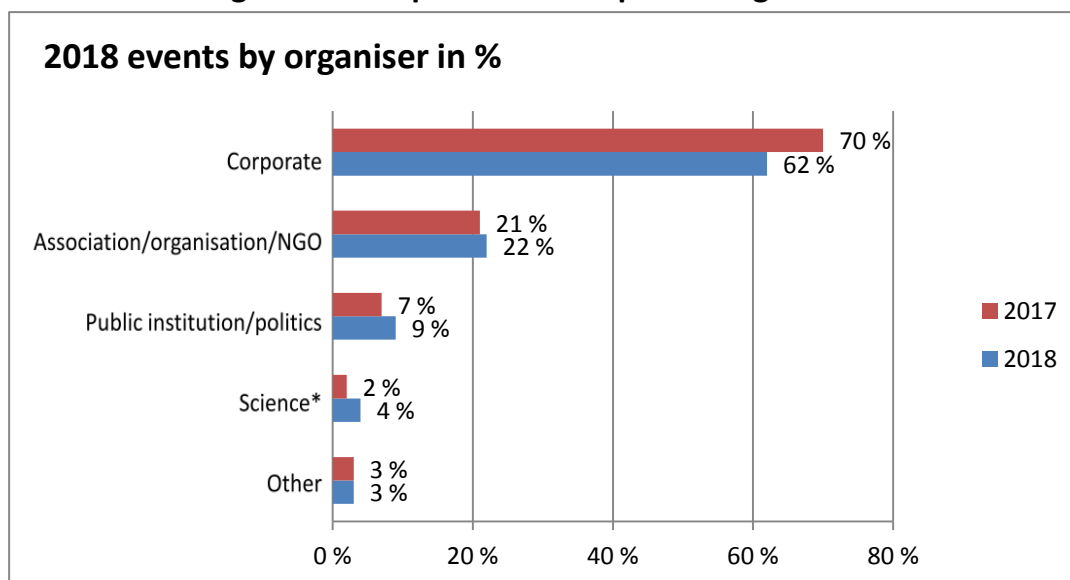


Source: ghb consult 2019 with reference to congress.net

- The structure of the events held according to size (number of attendees per event) remained relatively constant in 2018:
 - The proportion of **events with up to 100 attendees** was **84%** in 2018, which is the same as in the previous year.
 - The proportion of events **with more than 1,000 attendees** increased to **1.0%** in 2018 (from 0.9% in 2017).
- The average number of attendees per event in Berlin in 2018 was **83**, slightly below that of the previous year (85 in 2017).
- The average duration of an event in 2018 was **1.9 days**. In 2018, this was **1.7 days** for hotels, **2.0 days** for convention centres and **1.3 days** for locations; there were minor changes in this regard compared to 2018. Berlin's attractiveness for events lasting several days remains undiminished.
- At **64%**, the proportion of **one-day events** in 2018 was two percentage points higher than in the previous year (62%); by contrast, **events lasting several days** accounted for **36%** of all events in 2018, two percentage points less than in 2017 (38%).
- With regard to the type of event, the **conference** sector led the field in Berlin in 2018 with **72%** of the market (compared to 49.1% in the previous year). There was a slight shift to the detriment of the **convention** segment of **4%** compared to 8.2% in the previous year (see the definition of the types of event).

- In 2018, the private sector (**corporates**) continued organising most events in Berlin, being responsible for **62%**. In 2018, national and international **associations and organisations** contributed around one-fifth (**22%**) to the volume of events in Berlin, equal to the previous year's level (22% in 2017). Events arranged by public institutions accounted for 9% in 2018. Due to its role as the federal capital, Berlin occupies a comparatively strong position in this particular segment.

62% of event organisers are part of the corporate segment

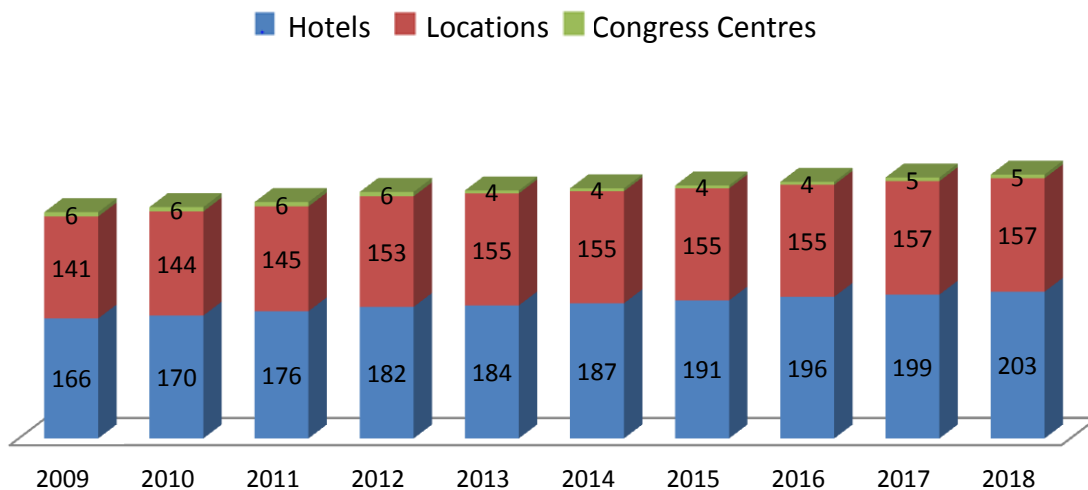


Source: ghh consult 2019 with reference to congress.net

- *The science segment was included in 2017 for the first time; the percentage was **4%** in 2018.
- Minor changes in the distribution of events according to the **parties making the bookings** were noted: in 2018, **87% of all events were directly booked** (85% in the previous year); **11%** of all bookings were made by **professional convention organisers** (11% in the previous year) and approximately **3%** by **others** and **online portals** (4% in the previous year).
- Since the commencement of the collection of statistics for the Berlin MICE market in 2002, the conference and convention sector in Berlin has developed rapidly. The number of providers rose from 245 in 2002 to 365 in 2018, which amounts to an increase of approx. 49%.

A continuous increase in the number of conference and convention providers in Berlin

Number of providers 2009 - 2018



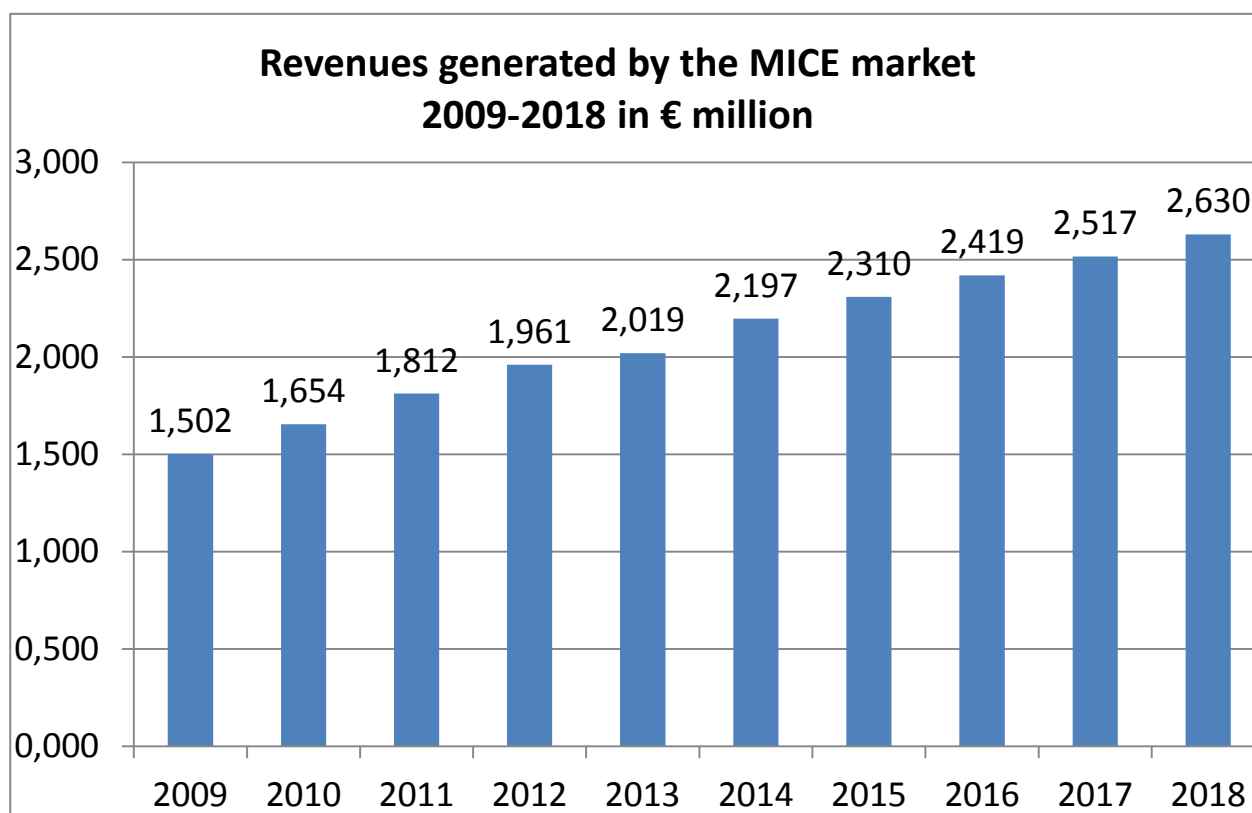
Source: ghg consult 2019 with reference to congress.net

Note: Since the beginning of 2017, the Estrel Hotel has been included among congress centres. (Previously in the hotels category)

- The 365 providers identified for 2018 have a total area of around 507,000 m² available for conferences.
- In terms of the number of providers, the 203 hotels (56% of providers) represent the largest contingent; they have around 111,000 m² of event space (22% of the total area).
- In terms of actual surface area, the 157 special event venues (locations, 43% of providers) with 320,000 m² of event space (63% of total surface area) continue to occupy first place.
- The five convention centres (convention, city and multi-purpose halls; 1% of the providers) have around 76,000 m² (15% of the space) and are, accordingly, a further important component in the federal capital's convention market.
- Well over a third (35%) of conference hotels and all the convention centres participated on congress.net in 2018. Together, they represent about 70% of the total space available for such events.

The 36 companies participating on congress.net offer about 55,000 m² of space at their locations. This represents 18% of the space in this category.

Turnover from the MICE market increased by approx. 64% in the last 10 years



Source: ghh consult 2019 with reference to congress.net

- **The economic implications for Berlin are considerable. The conference and convention attendees generated a gross sales volume (hotels, restaurants, retail, leisure and culture, transport, miscellaneous) of €2.630 billion in 2018, representing an increase of 2.3% from the previous year (€2.517 billion in 2017).**

In the last 10 years, the turnover generated by the MICE market in Berlin has risen by approx. 64%.

- **The average expenditure of an overnight attendee at an event in 2018 was around €250 per day. A day visitor's expenditure amounted to €85 per day, which means that the average daily expenditure per attendee in the 2018 conference and congress market was €221, 2.8% higher than in the previous year (€215).**
- **The number of full-time jobs created and secured by the MICE industry in Berlin rose from 43,200 in 2017 to around 44,100 full-time jobs in 2018. This corresponds to an increase of around 2.1%.**

I Annual Report 2018



By ghh consult

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