

Summary

Annual Report 2004

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1 SUMMARY

- In **Berlin 259 providers of venues** offer a total meeting space of around 321,500 m².
- **152 hotels** (59% of providers) have 78,600 m² event space at their disposal (24% of meeting space).
- **6 congress centres and halls** (2% of providers) offer 57,900 m² event space (18% of meeting space).
- **101 unusual venues** ("locations", 39% of providers) make available 185,000 m² event space (58% of the meeting space).
- 22% of convention hotels and 100% of congress halls took part in **congress.net** in 2004. Together, they represent **just under 70% of the total space offering** in venues of this kind.
- 10% of the location operators – who also offer 10% of the total event space in Berlin – took part.
- In 2004 more than **80,000 events were staged for approximately 6.2 million participants**. The number of events and participants was considerably higher than in 2003 (72,400 events with 5.7 million participants). This corresponds to an increase of + 10% in events and + 9% in participants.
- The Berlin **convention hotels** play a key role: 3.3 million participants (+ 12%) attended 67,200 events (+ 14%) (2003: 60,000 events with 2.9 million participants).
- In the **congress centres and halls** around 1,750 (+ 7%) events were staged in the course of 2004 with approximately 700,000 participants (+ 11%) (2003: 1,640 events with 630,000 participants).
- Around 10,900 events were recorded in 2004 in the so-called "**Locations**" (unusual venues) with approximately 2.2 million participants (2003: 10,700 events with 2.2 million participants).

- Overall, it can be said that the **convention market improved considerably in comparison with 2003**. Both the number of events and participants climbed dramatically. Hotels chalked up especially high growth rates.
- When it comes to **event size**, there is a clear trend towards a larger proportion of **smaller events**.
- **Events with up to 20 participants** accounted for half of all events in 2004.
- Overall, **events with fewer than 100 participants** accounted for 90% of total volume. This share rose by 4 percentage points in comparison to the previous year.
- Compared with 2003, the **average event length** fell from 1.7 to 1.6 days. Whereas hotels and locations only experienced a minor reduction in event length, the average event length for convention, municipal and multi-purpose halls was far shorter than the previous year (2004: 1.9 days, 2003: 2.4 days).
- The **proportion of one-day events** in Berlin increased from 66% in 2003 to 73% in 2004.
- The **seasonal distribution of events** in 2004 was similar to that in 2003. With 130 index points, November was the month with the highest number of events in 2004 (2003: most events in October with 125 index points).
- In 2004 **meetings** (36%), **conferences**, (13%), **seminars** (10%) and **other events** (9%) were the dominant **types of function** in Berlin. These shares are similar to the previous year. In the case of hotels as well as congress, municipal and multi-purpose halls meetings accounted for by far the largest share of all events (38% respectively). Events (35%) and seminars (24%) had the largest shares in the locations.
- Amongst all **organisers** more than 70% of all functions were staged by the **private sector** (2004: 71%, 2003: 74%).
- Whereas the share of the private sector fell, the share of **associations and organisations** as organisers increased. The share of the **agencies and PCOs** stagnated and that of the **public institutions** increased slightly.

- As in the previous year around 94% of all functions in 2004 were **direct bookings**, around 4% were bookings through **PCOs** and approximately 2% through **travel agents**.
- The **sector “Chemistry/Pharmaceuticals/Cosmetics”** was one of the most strongly represented **organisers** this year as in the past two years. With 12% it staged the most meetings and conventions in Berlin.
- The **sector “Commerce/Banks/Insurances”** with 12% of all **function participants** led the field in 2004.
- The **internationality of events** changed compared with previous years. The share of international events was three percentage points higher than in the two previous years (2004: 18%, 2002/2003: 15%).
- With regard to where **participants come from**, the **region** with 55% is still clearly dominant, followed by Germany, Europe and the rest of the world.
- If one examines where the **participants in the individual types of function come from**, then conventions have the largest proportion of overseas participants (2004: 10%, 2003: 12%).
- The share of **functions with exhibitions** fell markedly in 2004 (9%) compared with the previous year (14%).
- The meeting and convention travel business in Berlin led to **around 2.95 million bed nights**. This means an increase of 14% over the previous year (2003: 2.59 million bed nights).
- The **economic impact** on the city is considerable and far higher than the previous year. The volume of sales revenues generated by convention participants was € 998 million in 2004 (2003: € 754 million).
- The **average expenditure per participant** in the meeting and convention travel business was € 161 in 2004 (2003: € 132).
- Approximately, **19,800 full-time jobs** are secured in Berlin through the meeting and convention travel business.