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Annual Report 2011

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Compiled for:



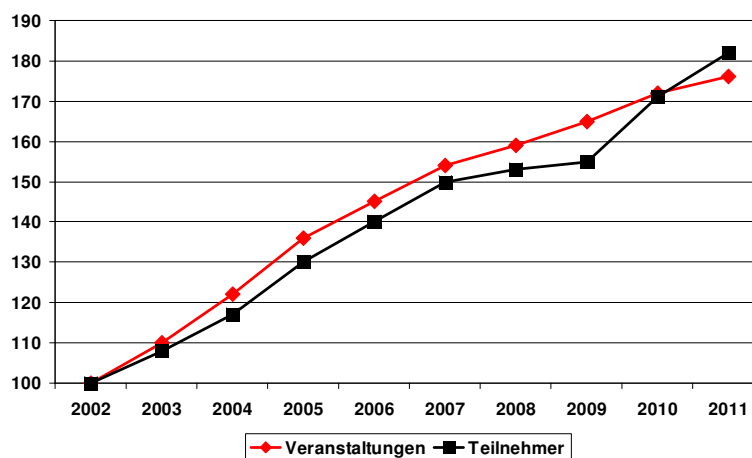
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The logo for ghh, consisting of the letters "ghh" in a blue sans-serif font, with the "g" and "h" connected.

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- The collection of data on the Berlin MICE market started in 2002. During the past 10 years the meeting and convention industry has continuously gained in importance in Berlin.
- In 2011 around 115,700 events (+2%) were staged with around 9.7 million participants (+7%). Both the number of events and the number of participants increased during the past 10 years by around 80 percent.

Starke Entwicklung der Zahl der Veranstaltungen und der Teilnehmer in Indexwerten



Quelle: ghh consult 2012 nach congress-berlin.net

Strong development of the number of events and participants based on index values

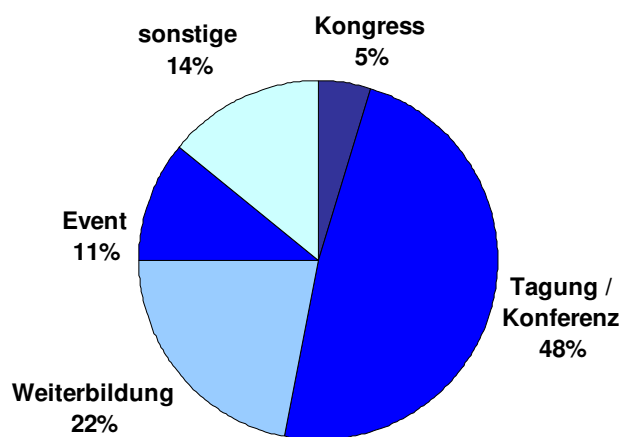
Events Participants

- A central role is played by the Berlin convention hotels: at 101,000 events (+6%) around 5.9 million participants (+7%) were recorded (2010: 95,500 events with 5.5 million participants).
- In the convention centres and halls about 2,200 events (-8%) with around 1.2 million participants (+/- 0) took place in 2011 (2010: 2,400 events with 1.2 million participants).
- At around 12,500 events (-18 %) approximately 2.6 million participants (8%) were recorded at the so-called 'locations' in 2011 (2010: 15,200 events with 2.4 million participants).
- Overall, it can be stated that the convention market has again considerably improved versus 2010. Both the number of events and of participants has risen; in 2011 Berlin recorded a plus of 2,600 events and 590,000 participants.
- As far as the event sizes are concerned, there were only minor variations compared to 2011. 85 percent of the Berlin events are staged with less than 100 participants. Although the events with more than 1,000 participants have only a share of slightly more than 1 percent in absolute numbers in the total event volume, they account nevertheless for approximately 1,250 events with around 1.9 million participants.
- The average meeting length remained altogether stable versus prior year in 2011 (1.9 days), but increased for hotels by 0.1 to 2.0 days; this is reflected by the growth in room nights. At the

convention centres the duration of events rose again (1.5 days, after a drop to 1.4 days in 2010). The 'locations' recorded a decrease in the number of events from 1.3 to 1.2 days.

- Within the last 10 years there has been a trend towards events with up to 20 persons (plus 4 percentage points) as well as towards events with 101 to 250 persons (plus 3 percentage points).
- The share of multi-day events increased again in 2011: 36 percent of the events in Berlin lasted for several days, 64 percent were single-day events.
- Approximately ¾ of all events are meetings and further education events.

Tagungen/Konferenzen und Weiterbildung prägen den Markt 2011



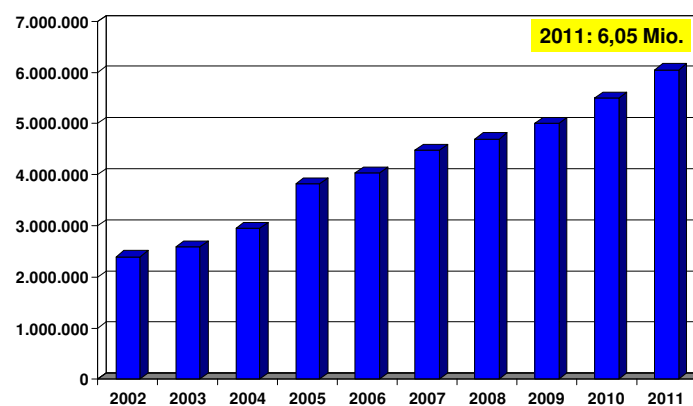
Quelle: ghh consult 2012 nach congress-berlin.net

Meetings/conferences and further education events characterise the market in 2011
Conventions 5% - Meetings/Conferences 48% - Further education 22% - Events 11% - Others 14%

- 72 % of the events in Berlin were staged by the private business community. The shares of associations/organisations remained unchanged. The shares of public institutions dropped by 2 percentage points.
- As in previous years 90 percent of all events in 2011 were directly booked, 7 percent of the bookings were accounted for by PCOs and approximately 2 percent by travel agencies.
- In 2011 the sectors "chemicals, pharmaceuticals, cosmetics", "commerce, banks, insurance companies" and "politics, public institutions" were the leading organisers of meetings, conventions and other events in Berlin with 10 percent each. The sector "publishing houses, media, culture, leisure, sports" ranked fourth with 9 percent.
- In terms of participants the sectors "commerce, banks, insurance companies" and "politics, public institutions, trade unions, lawyers" headed the field in 2011 with 12 percent of the participants each. "Publishing houses, media, culture, leisure, sports" ranked third with 10% of the participants.

- Around 19 percent of the events in Berlin were international ones in 2011. The number of foreign participants amounted to more than 1.5 million in 2011.
- The largest number of participants from abroad is recorded by large conventions: 21 percent of the participants come from European countries outside Germany, 6% from the rest of the world.
- The meeting and convention travel business in Berlin generated in 2011 around 6.05 million room nights. Compared to the previous year there has been an increase by 9 per cent (2010: 5.5 million room nights). This corresponds to around 27 percent of all hotel room nights in Berlin.
- The number of room nights initiated by the meeting and convention business in Berlin has almost tripled.

**Zahl der Übernachtungen aus dem Tagungs- und Kongressmarkt
nahezu verdreifacht**

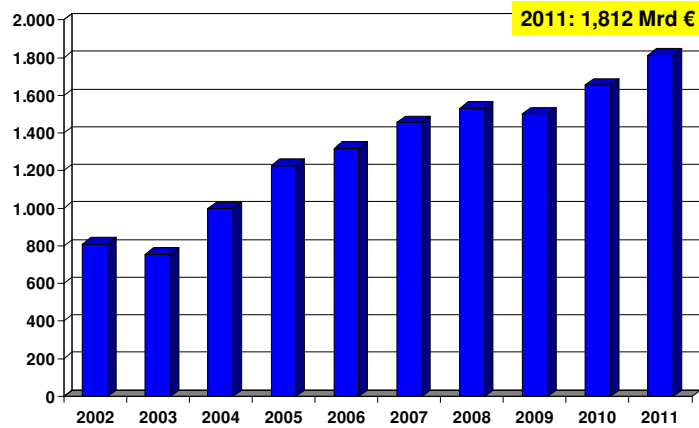


Quelle: ghh consult 2012 nach congress-berlin.net

Number of room nights from the meeting and convention market has almost tripled

- The economic impact resulting for the city is considerable. The sales revenues initiated by participants in meetings and conventions amount to € 1.813 billion in 2011; this corresponds to a 10 percent growth rate versus prior year (2010: € 1.654 billion).
- During the past 10 year period a doubling of the sales revenues generated by the MICE market in Berlin has been recorded:

Umsätze aus MICE Markt in 10 Jahren mehr als verdoppelt
(in Mio. €uro)



Quelle: ghh consult 2012 nach congress-berlin.net

Sales revenues from the MICE market more than doubled in 10 years (in € million)

- The average spending per participant in the meeting and convention travel business rose in 2011 versus prior year by 3 per cent to € 187.00.
- Around 34,000 full-time jobs are secured by the meeting and convention travel business in Berlin.