

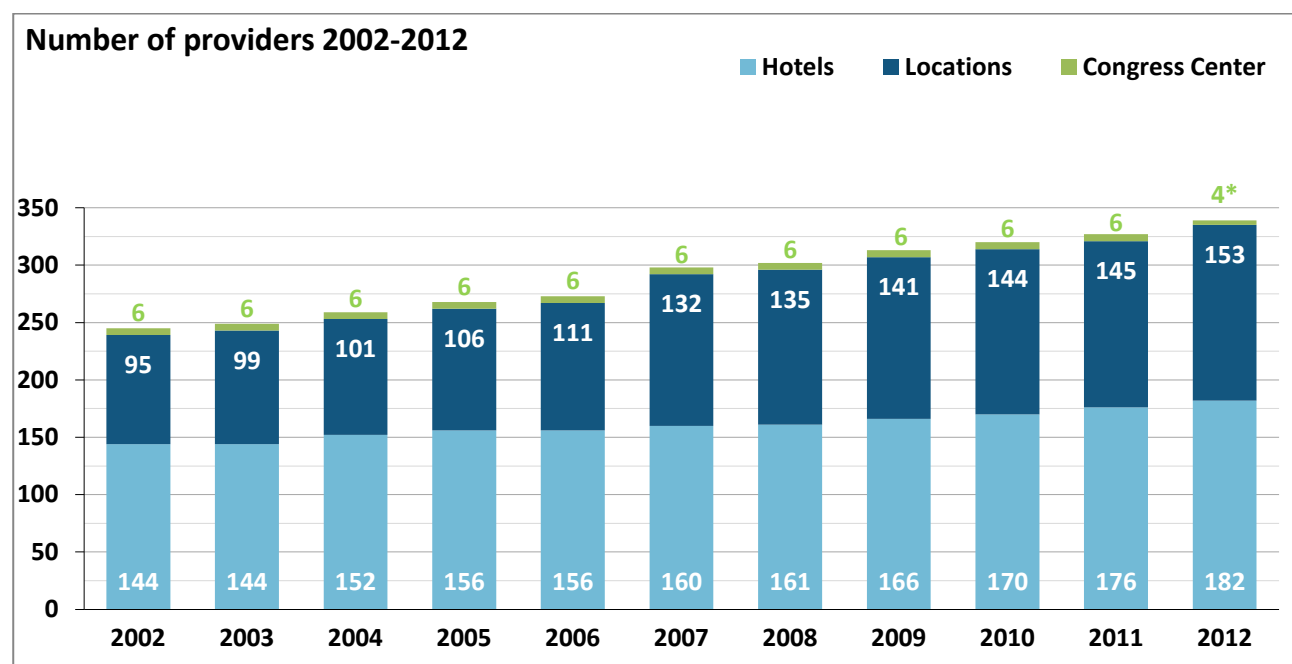
Convention Statistics

convention.visitBerlin.com

1. Executive Summary

- Since the collection of data on the Berlin MICE market started in 2002, the conference and convention sector has continuously gained in importance in Berlin, as the following graph shows:

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



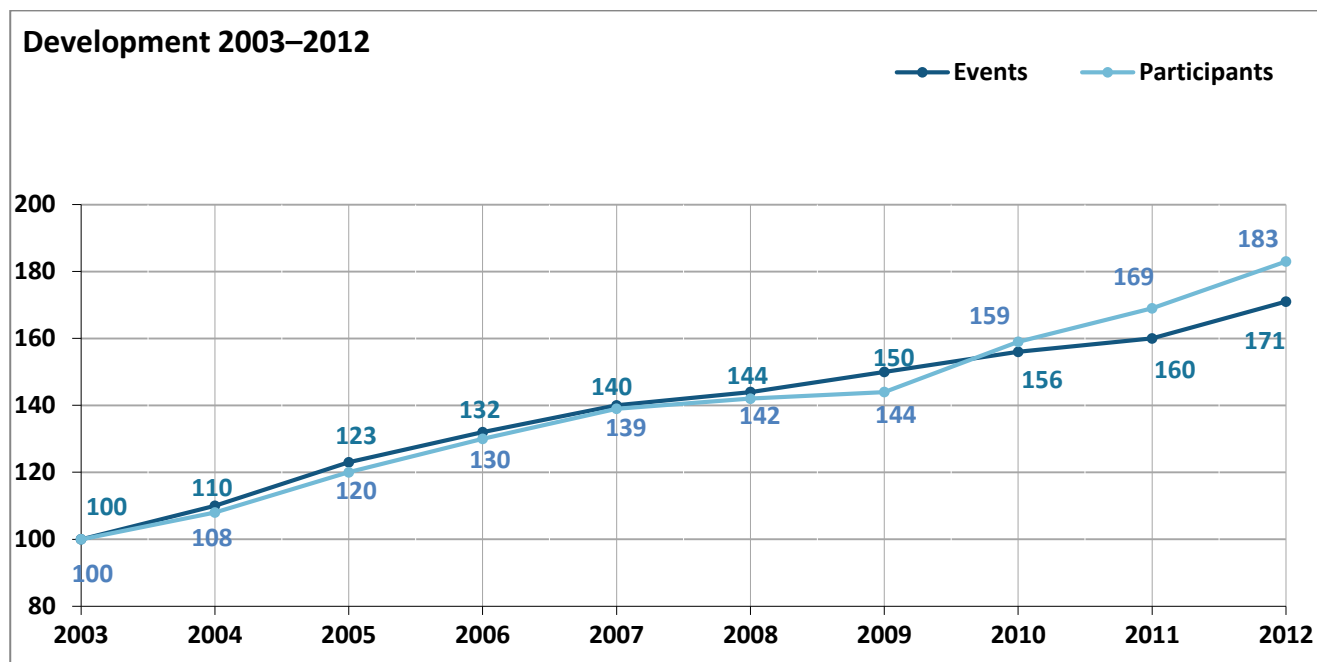
Source: ghh consult 2013 according to congress-berlin.net

*NB.: since 2012, 2 providers, which had previously been counted as "convention centres", have been classed as "locations".

- The 339 providers reported for 2012 offer a total conference space area of about 481,000m².
- The largest share in terms of the number of providers is represented by the 182 hotels (54% of providers), which offer a total of about 120,000m² of event space area (25% of the total area).
- However, purely in terms of area, the 153 "unusual locations" (45% of providers) are the uncontested leaders in the field with 310,000m² of event space area (64% of the total area).
- The 4 convention halls (1.2% of providers) offer about 51,000m² (11% of the total area).
- 38% of conference hotels and 100% of convention halls took part in congress.net in 2012. Together, they represent 71% of the total area on offer in event venues of this kind.
- The 33 "unusual event locations" that took part in congress.net offered an area of about 50,500m². This corresponds to 16% of the total area in this category.
- In 2012, about 123,900 events (+7%) were held, with about 10.5 million participants (+8%).
- This represented a significant increase compared to the figures achieved in 2011, with the number of events increasing by 8,200 and the number of participants increasing by 800,000.

- The number of events has risen by 71% over the last 10 years, while the number of participants has risen by 83%.

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



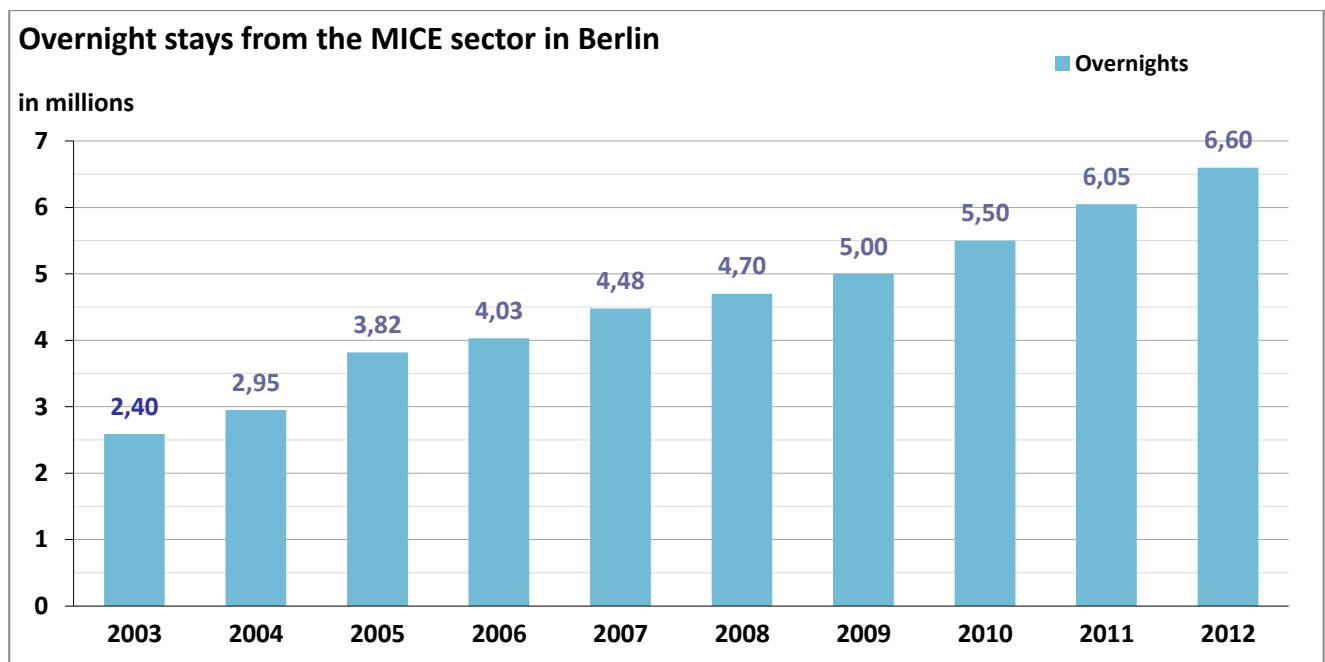
Source: ghh consult 2012 according to congress-berlin.net

- A defining role in this is played by Berlin conference hotels:
about 6.3 million participants (+6 %, previous year 5.9 million) were recorded
at 108,200 events (+7 %, previous year 101,000).
- About 1,900 events with about 1.0 million participants took place in convention centres over the course of 2012. A change in the classification of two providers means that a comparison with the previous year is not possible in this case.
- About 3.2 million participants (+22 %) were recorded at 13,800 events (+10%) in so-called "locations" in 2012. However, the fact that two established providers were assigned to this group should also be taken into account.
- **Overall, it can be stated that the convention market has again considerably improved compared to 2011.**
- The structure of the events in terms of their size (number of participants per event) is very stable:
 - the proportion of events with fewer than 100 participants dropped slightly from 85.4% to 84.9% in 2012.
 - **The proportion of events with more than 1,000 participants in 2012 was just under 1%; however, the number of participants in these events rose from 1.9 million to 2.1 million. This means that 1 in 5 participants attended an event with more than 1,000 people.**

- The average number of participants per event in Berlin in 2012 was 84, the same as the previous year.
- The average conference length remained overall stable again in 2012 compared to the previous year (1.9 days), and also remained at the same level as the previous year for different types of establishments: hotels 2.0 days, convention centres 1.5 days, locations 1.2 days.
- The duration of events has remained unchanged since 2010, at about 1.9 days. 10 years ago it was 1.7 days.
- The proportion of multi-day events increased again in 2012: 37 % (2011: 36%) of events in Berlin lasted for more than one day, 63 % (2011: 64%) were single-day events.
- In terms of the type of event, the "conference and meeting" sector characterised the market in Berlin in 2012, with a share of 49%. The events in the "convention" sector had a share of 6%.
- The private sector again played a leading role in holding events in Berlin in 2012: Nearly 70% (-2%) of all events were organised by the private sector, while around 19% (+1) were organised by associations and organisations. Public institutions accounted for a good 5% of events.
- The proportion of directly booked events remained unchanged compared to 2011, at 90% of all events, while just under 8% of bookings were accounted for by PCOs and ca. 2% by "other" bookers.
- The distribution of sectors was restructured and recomposed in 2012. The "IT, electronics, and communications" sector headed the field with 16.1% (not including "other" sectors), followed by "commerce, banks, and insurance companies" with 13.6% and "politics, public institutions, and associations" with 12.5%.
The "chemicals, pharmaceuticals, and cosmetics" sector also achieved the same figure of 12.5%.
- **The future-oriented sector of "medicine, science, and research" is also very strongly represented in Berlin with nearly 10%. This is demonstrated especially by the number of participants, which, with a share of 13.4%, was the second highest after "politics, public institutions, and associations", which had a share of 14.6%. "Commerce, banks, and insurance companies" came in third place with 13.2% (not including "other" sectors in each case).**
- After a period of stagnation in 2010 and 2011, the proportion of international events rose from 18% in 2011 to 19% in 2012. The number of foreign participants amounted to just under 2 million in 2012.

- In terms of where the participants came from, the Berlin/Brandenburg region is still clearly at the fore with 43%, although a slight shift towards the proportion of participants from the rest of Germany can be identified. The proportions of participants from Europe and other continents rose again somewhat in 2012, after a slight decline in 2011. The importance of Berlin in science, economics, culture, and research, as well as its importance as the home of the most important associations and organisation in Germany, is evident here.
- The meeting and convention market generated around 6.6 million overnight stays in Berlin in 2012. This represented an increase of 9% compared to the previous year (2011: 6.05 million overnight stays).
- The number of overnight stays generated by the meeting and convention business in Berlin has almost tripled in the last ten years.

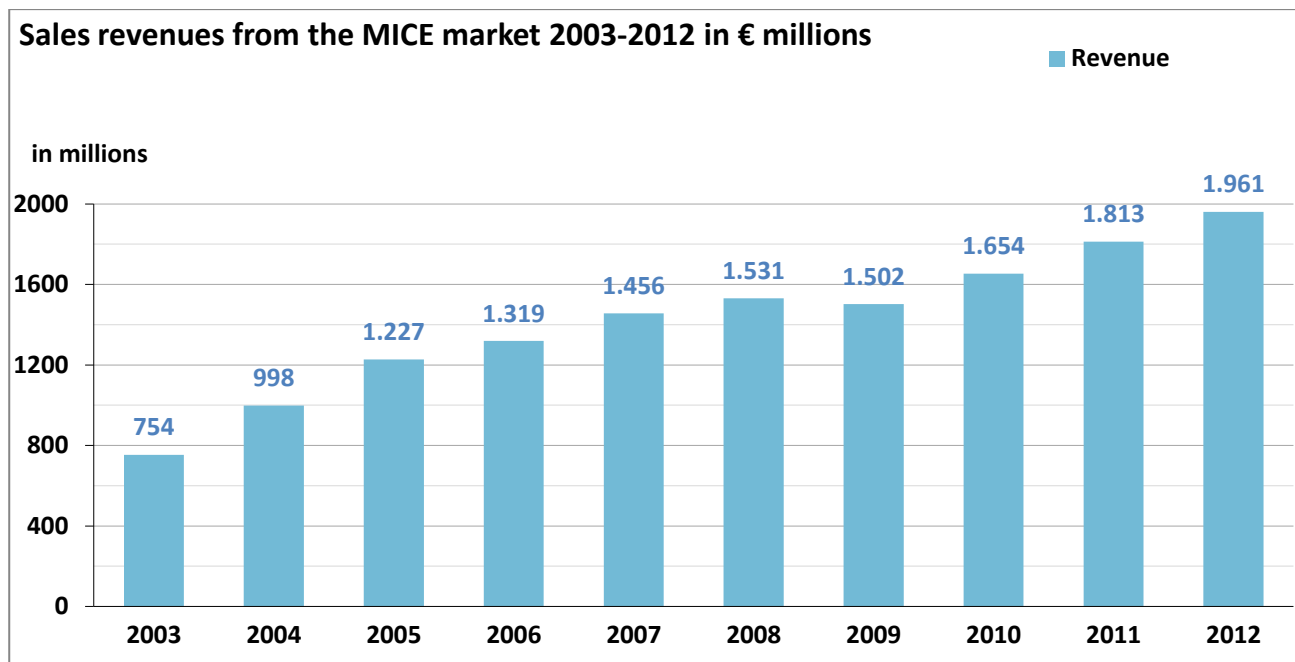
The number of overnight stays from the meeting and convention market has almost tripled



Source: ghh consult 2013 according to congress-berlin.net

- The resulting economic impact on the city is considerable. The sales revenues generated by participants in meetings and conventions amounted to €1.961 billion in 2012, which corresponds to a growth of 8% compared to the previous year (2011: €1.8 billion).
- The sales revenues generated by the MICE market in Berlin have more than doubled over the last 10 years.

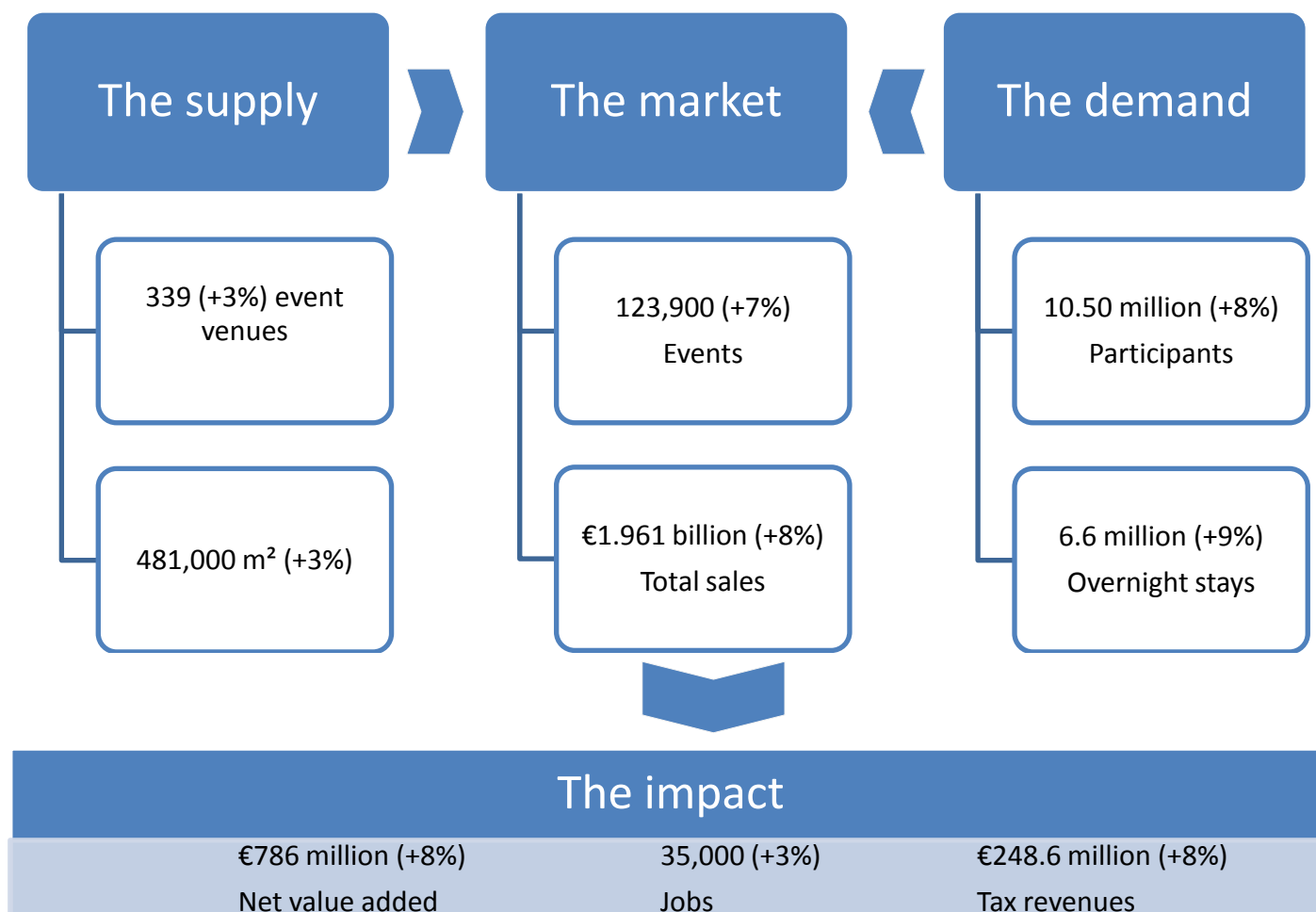
Sales revenues from the MICE market have more than doubled in 10 years (in € millions)



Source: ghh consult 2013 according to congress-berlin.net

- The average spending per participant in the meeting and convention market in 2012 remained the same as the previous year at €187.00. However, there were slight increases in overnight stays and slight declines in purchases and culture/leisure.
- The number of full-time jobs generated and secured by the MICE sector in Berlin rose from 34,000 in 2011 to about 35,000 full-time jobs in 2012.

■ Key figures for the Berlin Conference and Convention Market 2012



Source: ghh consult 2013 according to congress-berlin.net

- **Thanks to a revision and improvement of the online data collection system, the following innovations have resulted for the 2012 Berlin Convention Statistics, and there may be deviations on the following points:**
- *The Travel Agents and Other categories were combined when collecting the data on "Bookers".*
- *The Agents and Other categories were combined when collecting the data on "Organisers".*
- *Due to the formation of groups of event types, since the 2nd half of 2012 there have been only 5 instead of 9 types of events as in previous years.*
- *Data on the "Origin of the Organiser" category has been collected in addition to data on the "Origin of the Participant" category since the 2nd half of 2012. In addition, the data for the countries "The UK" and "The USA/Canada" were collected separately for both categories.*
- *The sectors have been rearranged into new groups since the second half of the year.*

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