

Convention Statistics

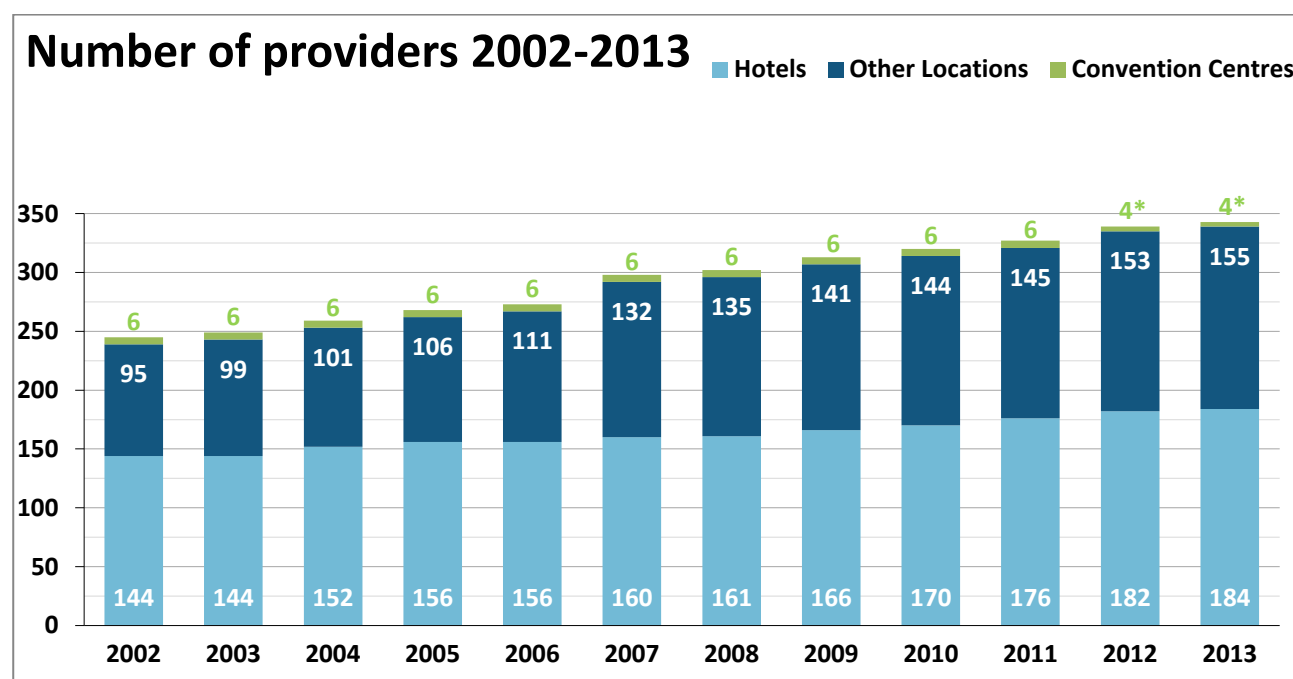
convention.visitBerlin.com

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1. Executive Summary

- Since data began to be collected about the Berlin MICE market in 2002, the meetings and convention business in Berlin has seen very dynamic growth. The number of providers has increased from 245 in 2002 to 343 in 2013, representing an increase of 40%.

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



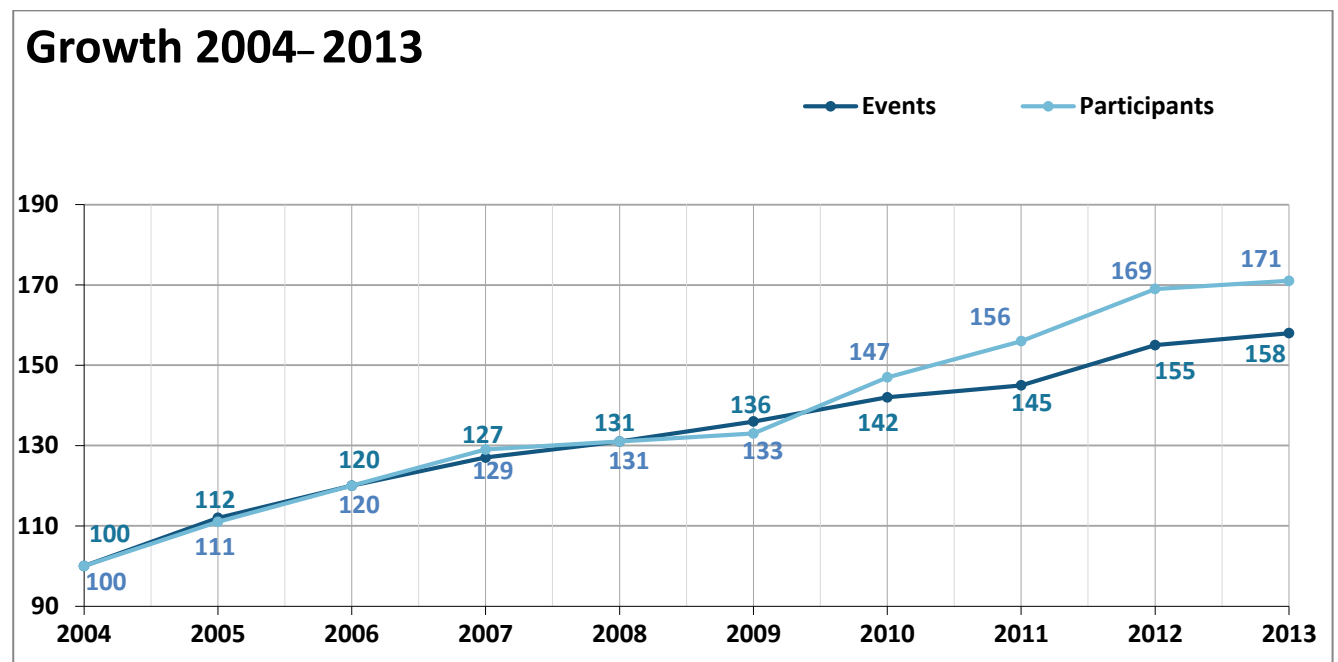
Source: ghh consult 2014 per congress-berlin.net

* Note: from 2012, two providers previously listed as convention centres are now classified as locations.

- The 343 providers counted in 2013 offer meeting space totalling approx. 483,000 m².
- The largest number of providers is made up by the 184 hotels on the list (equalling 54% of providers), that together offer about 121,000 m² of meeting space (25% of the total available space).
- The largest amount of space, however, is offered by the 155 unusual venues or locations (representing 45% of the providers) with 311,000 m² of meeting space (64% of the total).
- The four convention centres make up barely 1% of the providers, but provide around 51,000 m² (11%) of the available meeting space and are thus important pillars of the city's MICE sector.
- More than a third (37%) of the conference hotels and all of the convention centres participated in congress.net in 2013. Together, they represent 71% of the total area on offer in event venues of this kind.

- Among other locations, 36 participated in congress.net, representing 55,000 m² of meeting space. This corresponds to 18 % of the total area in this category.
- **In 2013, 126,200 events (+2%) were held, welcoming approximately 10.6 million participants (+1%)**
- The number of events has risen by 58% over the last 10 years, while the number of participants has risen by 71%.

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



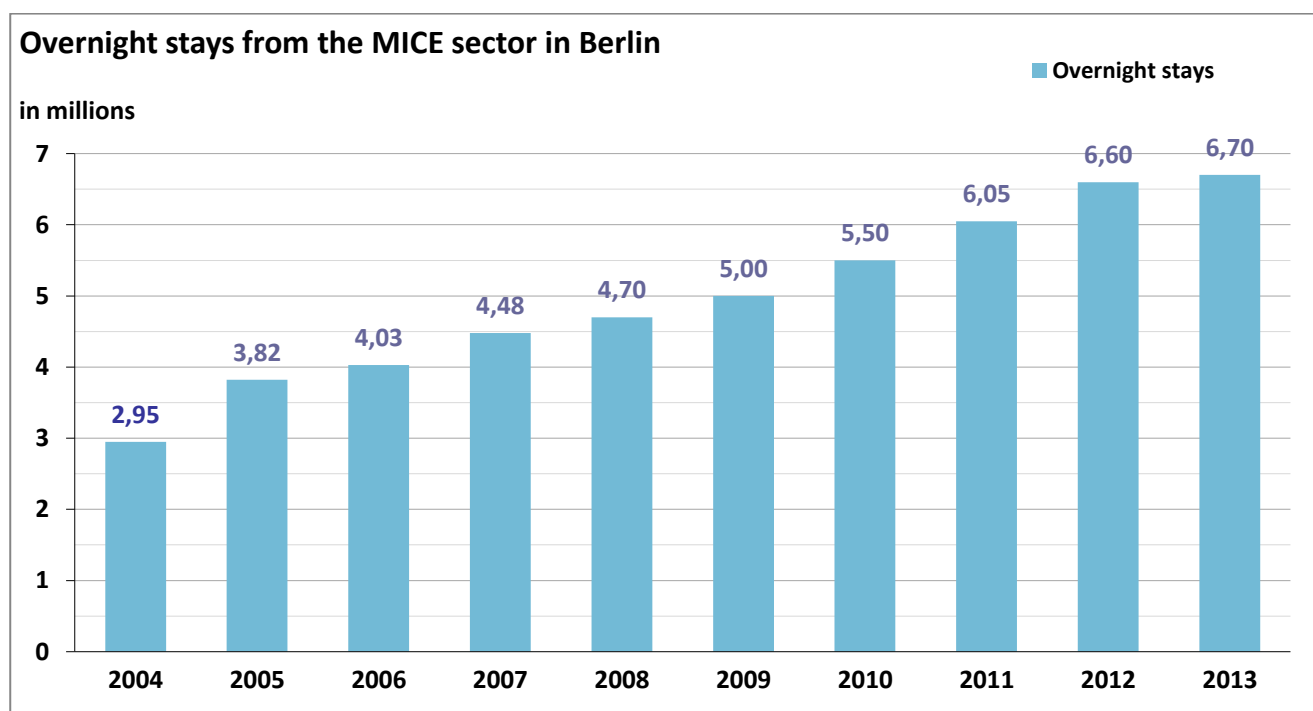
Source: ghh consult 2014 per congress-berlin.net

- A defining role in this is played by Berlin conference hotels: they hosted 110,200 events (+2% over 2012), with some 6.35 million participants (+1% over 2012).
- Like the year before, the four convention centres held about 1,900 events in 2013 with around 1.0 million participants.
- The approx. 14,100 events (+2%) at other locations in 2013 welcomed about 3.25 million participants (+2%).
- **Overall, it can be said that the convention market has seen some improvement over 2012 and has become consolidated at the highest level.**
- The structure of the events by size (number of participants per event) remained largely constant in 2013.
 - In 2013, the proportion of events with fewer than 100 participants was 85.2%, slightly higher than the previous year (84.9%).
 - Just 0.4% of the events had more than 1,000 participants in 2013, slightly lower than the 0.7% posted in the previous year, but these major events brought in some 1.7 million participants (16% of the total).

- In 2013, the average number of participants per event in Berlin was 83, slightly below the average of 84 in the previous year.
- On average, events lasted 1.8 days in 2013 (1.9 days in 2012). At the hotels, this figure was 1.9 days in 2013 (down from 2.0 in the previous year); at the convention centres, the average stood at 1.5 days (unchanged from the previous year); and events at other locations lasted an average 1.2 days (also unchanged).
- As in the previous year, 63% of the events lasted one day, with the remainder lasting more than one day.
- Conferences and meetings continue to dominate the MICE market in Berlin, with such events accounting for 50% of the events in 2013 (up from 49% in 2012). The proportion of events considered conventions remained unchanged at 6%.
- The private sector was once again the prime organiser of events in Berlin in 2013: 69% (+1%) of all events were organised by the private sector, whereas associations and organizations were responsible for 20% (+1%) of the gatherings. Public institutions continued to make up 5% of the meeting business as they had in 2012.
- Also unchanged from the previous year, 90% of all events were booked directly in 2013, almost 8% were booked through PCOs and the remainder were listed as "Other".
- The largest share of the events held were in "retail, banking, insurance" and "politics/public institutions", each with 11%; these were followed by "medicine, research, science", "IT, electronics, communications" and "chemistry, pharmaceuticals, cosmetics" with 10% each.
- The number of participants by industry paints a somewhat different picture than the pure number of events by industry. **The highest number of participants** came from the **medicine, science and research** sector, who made up **14%** of the total (previous year: 12%). "Politics and public institutions" (12%) and "trade, banking and insurance companies" continue to play a dominant role for German capital's MICE sector.
- In 2013, about 18% of the events in Berlin had an international dimension, down some from the previous year (19%). About 1.9 participants came from abroad in 2013, representing almost one-fifth of the total.

- Participants from the capital city region continue to make up the largest group at 43%, while 39% of people coming to Berlin for a meeting came from within other areas of Germany (up a point over the previous year). The importance and international appeal of Berlin as a MICE destination for science, business, culture and research, as well as the seat of the most important associations and organizations in Germany was once again reflected in the proportions of participants coming from the rest of continental Europe (11%), the United Kingdom (3%), USA/Canada (3%) and other continents (1%).
- Berlin's meetings and convention market generated about 6.7 million overnight stays in 2013n. This is an increase of approx. 1.5% over the previous year.
- The number of overnight stays occasioned by meetings and conventions in Berlin has more than doubled in the past ten years (+127%) to 6.7 million in 2013. This demonstrates the importance of the MICE market to the Berlin hotel industry.

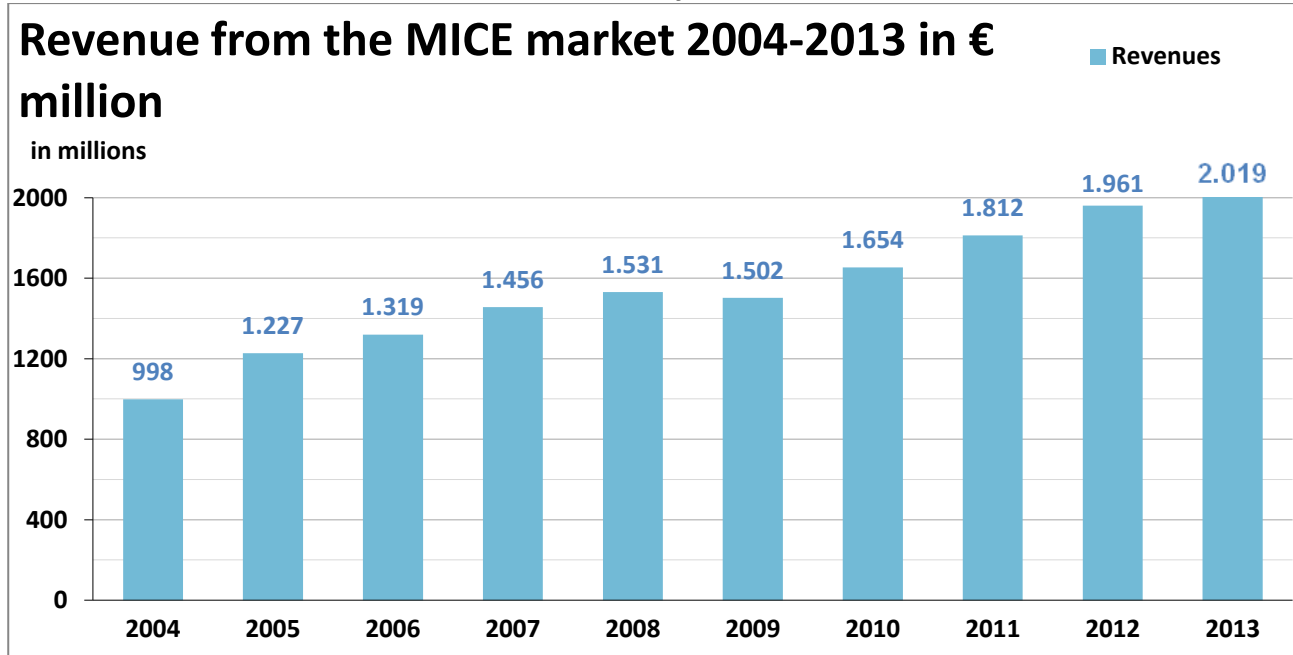
Number of nights from the meeting and convention market more than doubled



Source: ghh consult 2014 per congress-berlin.net

- The economic implications for Berlin are considerable.
The revenues generated by people attending meetings and conventions equalled €2.019 billion in 2013, representing 3% year-on-year growth (2012: €1.961 billion).
- The sales revenues generated by the MICE market in Berlin have more than doubled over the last 10 years.

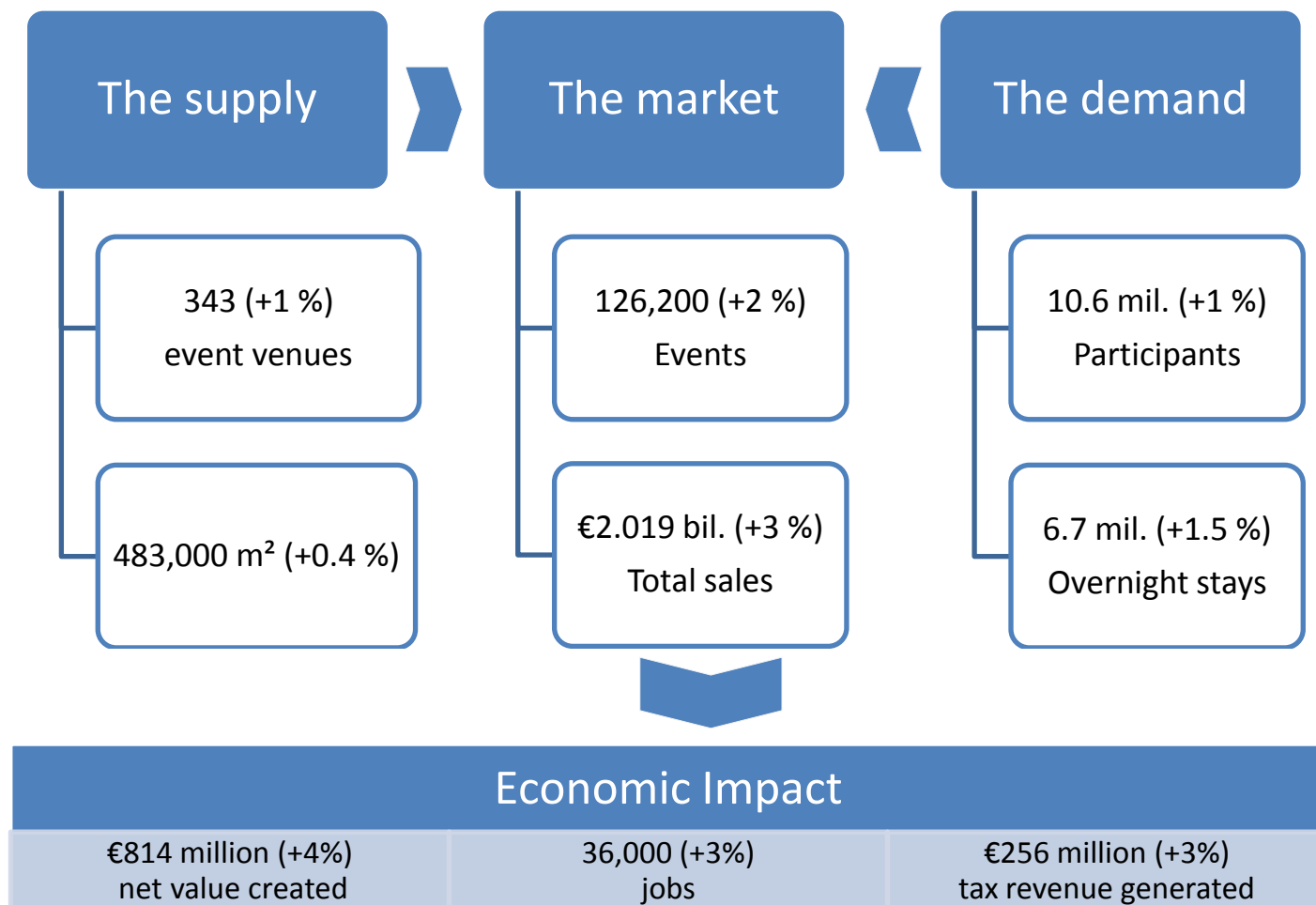
Revenues from the MICE market in the last 10 years have more than doubled (in € million)



Source: ghh consult 2014 per congress-berlin.net

- The **average expenditure per meeting or convention attendee** was around **€190.00**, higher than the €187 spent last year.
- The number of full-time jobs attributable to the MICE sector in Berlin rose from 35,000 in 2012 to around 36,000 in 2013, representing an increase of approximately 3%.

■ Key figures for the Berlin Conference and Convention Market 2013



Source: ghh consult 2014 per congress-berlin.net