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**Annual Report 2008**

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**January 2009**

**Produced for:**



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## EXECUTIVE SUMMARY

- In Berlin 302 venue providers offer a total meeting space of approximately 438,400 m<sup>2</sup>.
- 161 hotels (53% of providers) have around 102,000 m<sup>2</sup> event space (23% of meeting space).
- 6 convention centres and halls (2% of providers) offer 57,900 m<sup>2</sup> event space (13% of meeting space).
- 135 “unusual venues” (locations, 45% of providers) make 278,500 m<sup>2</sup> event space (64% of meeting space) available.
- 39% of meeting hotels and 100% of convention halls took part in congress.net in 2008. Together they represent 76% of the total space offering in venues of this kind.
- 19% of the location providers who account for 14% of the total event space in Berlin locations took part.
- In 2008 around 104,600 events with approximately 8.15 million participants were staged. The number of events and participants was higher than in 2007 (101,200 events with 7.97 million participants). This corresponds to an increase of +3% for events and +2% for participants.
- The Berlin convention hotels play a key role: 87,600 events (+3%) attracted 4.8 million participants (+2%) (2007: 85,000 events with 4.7 million participants).
- Around 2,500 events (+4%) with approximately 850,000 participants (+4%) were staged in the convention centres and halls in the course of 2008 (2007: 2,400 events with 820,000 participants).

- Around 14,500 events (+5%) were recorded in 2008 in the so-called locations with approximately 2.5 million participants (+2%) (2007: 13,800 events with 2.45 million participants).
- Overall the convention market improved compared with 2007. Both the number of participants and events rose.
- The impact of the current global economic crisis has not yet been felt in the meeting and convention industry. Events that had been planned in the medium and long term were staged.
- In terms of event size there were slight changes compared with 2008. Whereas the number of events with up to 20 participants and between 21 and 50 participants fell slightly (2008: 45% and 28% respectively, 2007: 47% and 29% respectively), slightly more larger events were held.
- The average meeting length in 2008 of 1.7 days increased compared with the previous year by 0.1 days (2007: 1.6 days). Whereas there were no changes in the case of the convention, municipal and multi-purpose halls with average meeting lengths of 1.7 and 1.4 days respectively compared to the previous year, the average meeting length in locations increased from 1.2 days in 2007 to 1.4 days in 2008.
- The share of multi-day events rose in 2008. 32% of the events in Berlin were multi-day and 68% were one-day events.
- The seasonal distribution of events in Berlin in 2008 follows the typical seasonal curve of meeting and convention events with high levels above all in the spring and autumn months and low demand in the summer vacation months of July and August.
- In 2008 meetings (32%), conferences (14%), events (13%) and seminars (12%) were the dominant types of event from the Berlin perspective. These shares are similar to the previous year. In the case of hotels, meetings were

by far the largest category of events (36%). In the case of convention, municipal and multi-purpose halls, conferences were the largest segment (33%). Events (50%) were the largest category of functions in the locations.

- Around 70% of the organisers in 2008 came from the private sector. Whereas the share of the private sector increased, the share of associations, organisations and public institutions fell slightly. Agencies and PCOs were able to sustain their share of 5%.
- In 2008 roughly 90% of all events were directly booked. Around 7% of the bookings were made by PCOs and approximately 2% by travel agencies.
- The sectors “Trade, banking, Insurance” and “Chemicals, pharmaceuticals, cosmetics” were the most highly represented amongst organisers in 2008. With 11%, they staged the most meetings and conventions in Berlin. The sector “Publishing houses, media, culture, leisure, sport” was in third place with 10%.
- The sector “Publishing houses, media, culture, leisure and sport” headed the field with 11% in 2008, followed by “Politics, public administration, trade unions, lawyers” and “Trade, banking, insurance” with 9% each.
- The share of international events was on the same level as the previous year (23%). This means that almost one in four events in Berlin has an international dimension.
- With regard to the origins of participants, the region with 46% is still very clearly to the fore. Overall, however, there is a trend towards larger shares of participants from Europe and the rest of the world.
- If one looks at the origins of participants in the different types of event, then conventions have the largest proportion of foreign participants (9%).

- The share of events with exhibitions remained the same in 2008 (6%) as the previous year.
- The meeting and convention travel business in Berlin generated approximately 4.7 million bed nights in 2008. This means an increase of 6% (2007: 4.48 million bed nights) compared with the previous year.
- The economic impact for the city is considerable and is even higher than the previous year (+6%). The volume of sales revenues generated by meeting and convention participants amounted to €1.531 billion in 2008 (2007: €1.456 billion).
- The average expenditure per participant in the meeting and convention travel business in 2008 was €188 (2007: €183).
- Around 29,600 full-time jobs are safeguarded through the meeting and convention travel business in Berlin.