

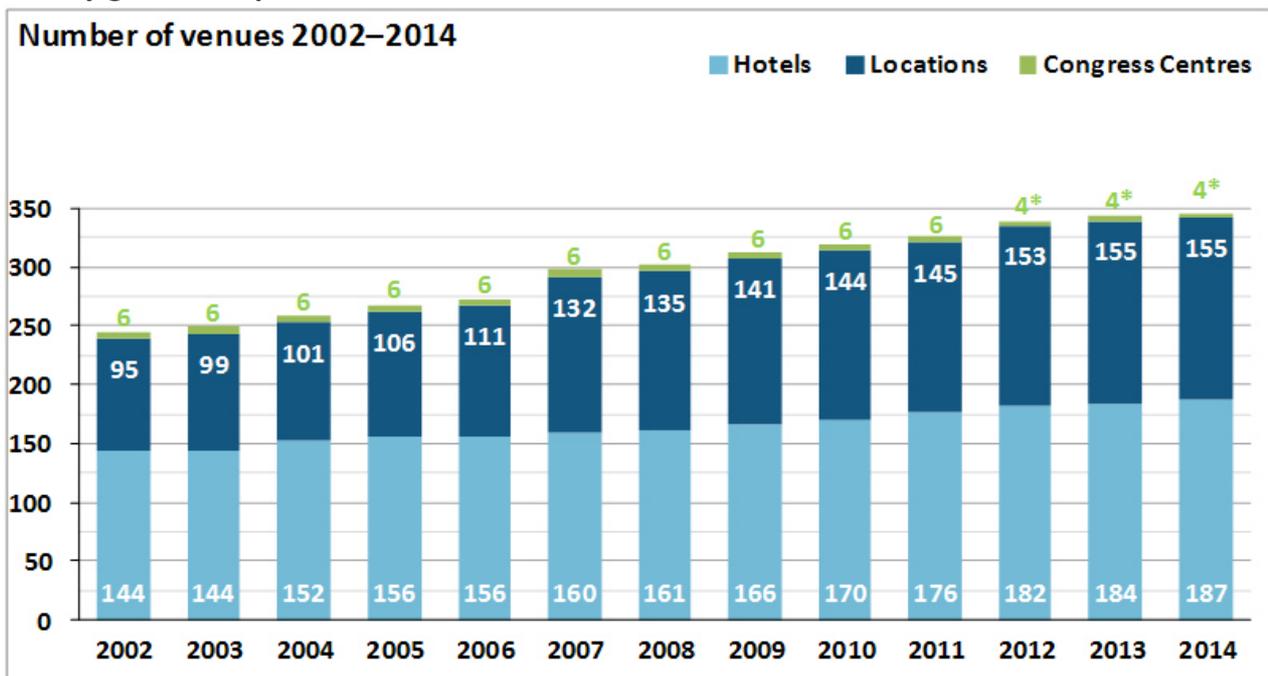
Convention Statistics 2014

convention.visitBerlin.de

1. Executive Summary

- Berlin's meetings and conventions market was shaped by a number of important developments and events in 2014. 9 November 2014 marked a quarter century since the fall of the Berlin Wall, which led to much international attention for the German capital, and not just on the anniversary itself. Numerous other events took place in Berlin within the framework of this key anniversary year.
- One important change in the city's convention-related offerings came with the 2014 closure of the ICC and opening of CityCube Berlin, the latter being able to host events for up to 11,000 people. Like the ICC previously, CityCube Berlin also actively markets itself as a site for MICE events at congress-berlin.net.
- 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 346 in 2014, representing an increase of 41%.

Steady growth in providers in Berlin: number of hotels, convention centres, and locations



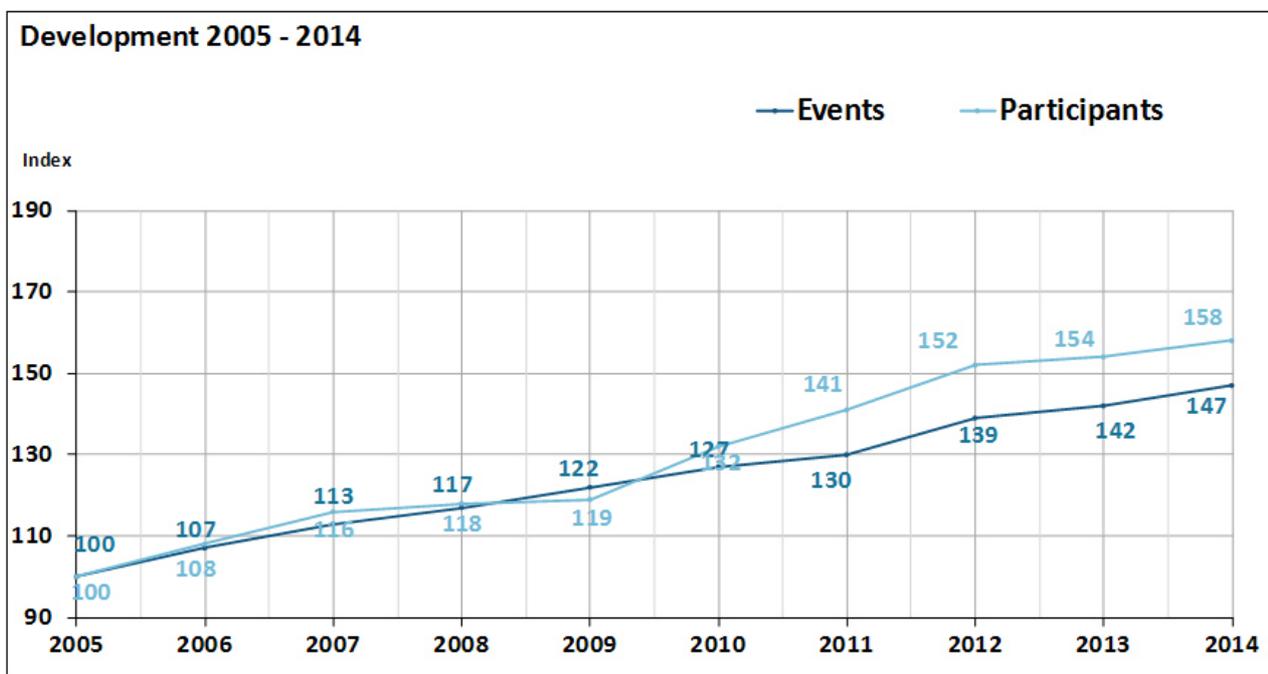
Source: ghh consult 2015 per congress-berlin.net

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

- The 346 providers counted in 2014 offer meeting space totalling approx. 485,000 m².
- The largest number of providers is made up by the 187 hotels on the list (equalling 54% of providers), that together offer about 123,000 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 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 (36%) of the conference hotels and all of the convention centres participated in congress.net in 2014. They represent some 70% of the total space offered by Berlin venues of this type.
- Among other locations, 36 participated in congress.net, representing 55,000 m² of meeting space. They represent 18% of the space offered in this category.
- **In 2014, 131,200 events (+4%) were held, welcoming approximately 10.9 million participants (+3%)**
- The number of events has risen by 47% over the last 10 years, while the number of participants has risen by 58 %.

Strong growth in event and participant indexes



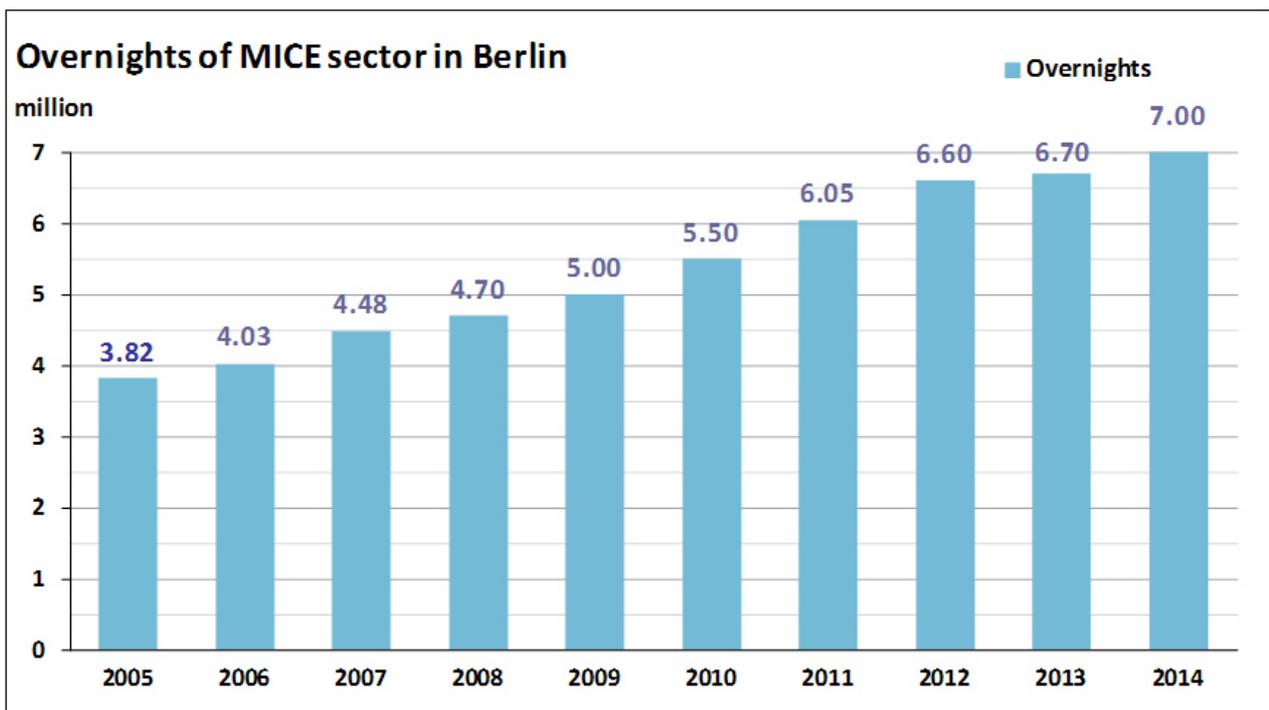
Source: ghh consult 2015 per congress-berlin.net

- A defining role in this is played by Berlin conference hotels: they hosted 114,600 events (+4% over 2013) and some 6.55 million participants (+3% over 2013).
- The four convention centres held about 2,000 events in 2014 (+5%) with around 1.03 million participants (+3%). In particular, it can be said that Berlin has some room to grow to meet the demand for larger events; numerous major conferences could not be held in the German capital due to insufficient capacity.
- The approx. 14,600 events (+5%) at other locations in 2014 welcomed about 3.35 million participants (+3%).
- **Overall, it can be said that the convention market has seen strong growth over 2014.**

- The classification of events by size (number of participants per event) remained largely constant in 2014.
 - In 2014, the proportion of events with fewer than 100 participants was 85.1%, almost the same as the previous year (85.2%).
 - Just 0.4% of the events had more than 1,000 participants in 2014, a proportion consistent with the previous year, but these major events brought in some 1.8 million participants (16% of the total).
- In 2014, the average number of participants per event in Berlin remained constant at 83.
- On average, events lasted 1.9 days in 2014 (1.8 days in 2013). Hotel-based events lasted on average 2.0 days in 2014 (up from 1.9 in the previous year); the average at the convention centres remained constant at 1.5 days; and events at other locations also remained constant at an average length of 1.2 days.
- As in the previous year, 63% of the events lasted one day, with the remainder lasting more than one day.
- Conferences and meetings continued to dominate Berlin's MICE market, with such events accounting for 50% of the events in 2014, unchanged from the previous year. Events listed as conventions posted a slight increase with a share of 7% of events, up from 6% the previous year.
- The private sector once again took the lead in organising events in Berlin, being responsible for 70% of all events in 2014 (2013: 69%); whereas professional associations and other organisations were responsible for 22% (2013: 20%) of the gatherings. Public institutions, meanwhile, organised just 6% of the events in 2014 (2013: 5%).
- Unchanged from the previous year, 90% of all events in 2014 were booked directly, whereas PCOs organised almost 9% of events (2013: 8%) and the remainder (1%) were listed as "Other" (2013: 2%).
- The industries/sectors holding the highest number of events were "medicine, science and research", "IT, electronics, communications" and "policy, public institutions", each responsible for 11% of Berlin events in 2014. At 10% each, the industries' "trade, banking, insurance", "chemicals, pharmaceuticals, cosmetics", and various aggregated under "services" were also strongly represented.
- The highest number of participants came from the medicine, science and research sector, which made up 15% of the total (previous year: 14%). "Politics and public institutions" (12%) and "trade, banking and insurance companies" (11%) continue to play a leading for German capital's MICE sector.
- In 2014, about 19% of the events in Berlin had an international dimension (2013: 18%). About 2.1 participants came from abroad in 2014, representing almost one-fifth of the total.

- Participants from the capital city region continue to make up the largest group at 42% (2013: 43%), while there was a slight increase in the number of people coming to Berlin for a meeting from other parts of Germany (40%). 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 7.0 million overnight stays in 2014. This is an increase of approx. 4.5% over the previous year.
- The number of beds available in Berlin rose to 137,255 in 2014 (2013: 132,600), representing an increase of approx. 3.5%.
- The number of overnight stays occasioned by meetings and conventions in Berlin has grown by more than 80% in the past ten years to 7.0 million in 2014. This demonstrates the importance of the MICE market to Berlin's hotel industry.

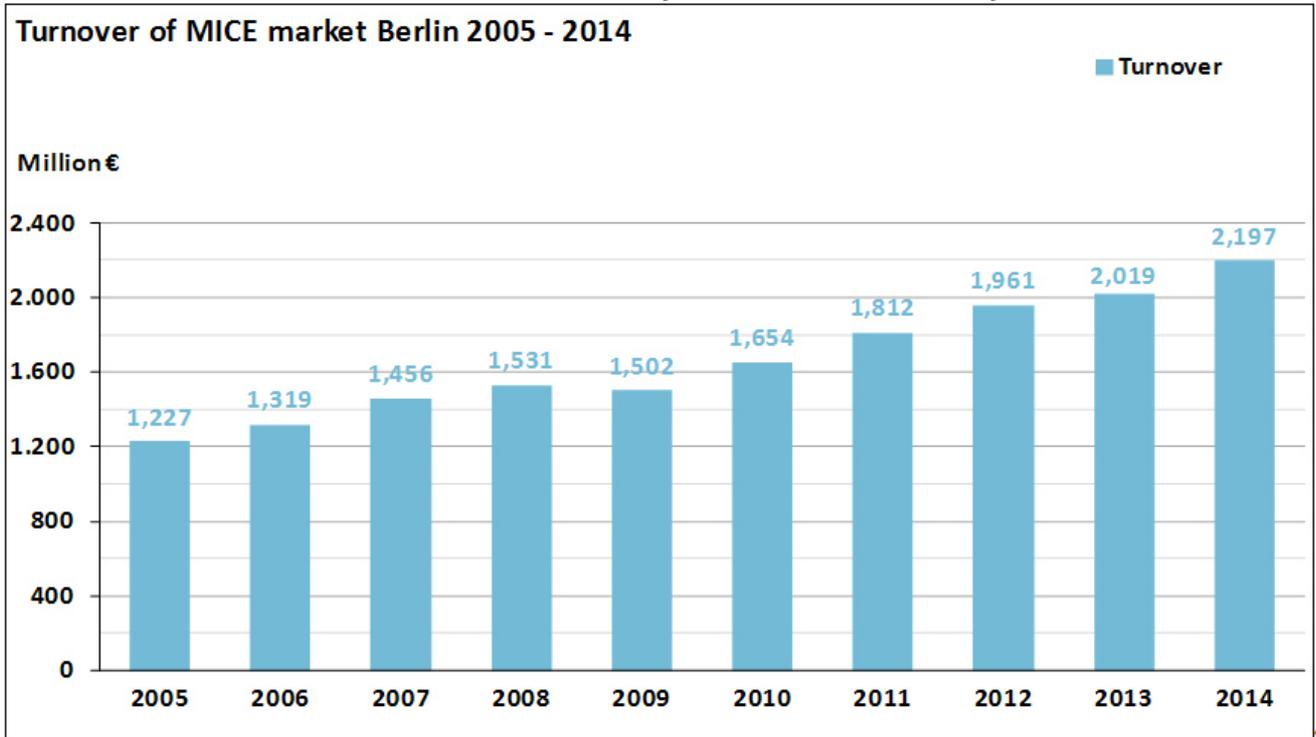
More than 80% growth in number of nights from the meeting and convention market



Source: ghh consult 2015 per congress-berlin.net

- The economic implications for Berlin are considerable. The revenues generated by people attending meetings and conventions equalled €2.197 billion in 2014, representing 9% year-on-year growth (2013: €2.019 billion)**
- In the past 10 years, the revenues generated by Berlin's MICE market have jumped by approx. 80%.

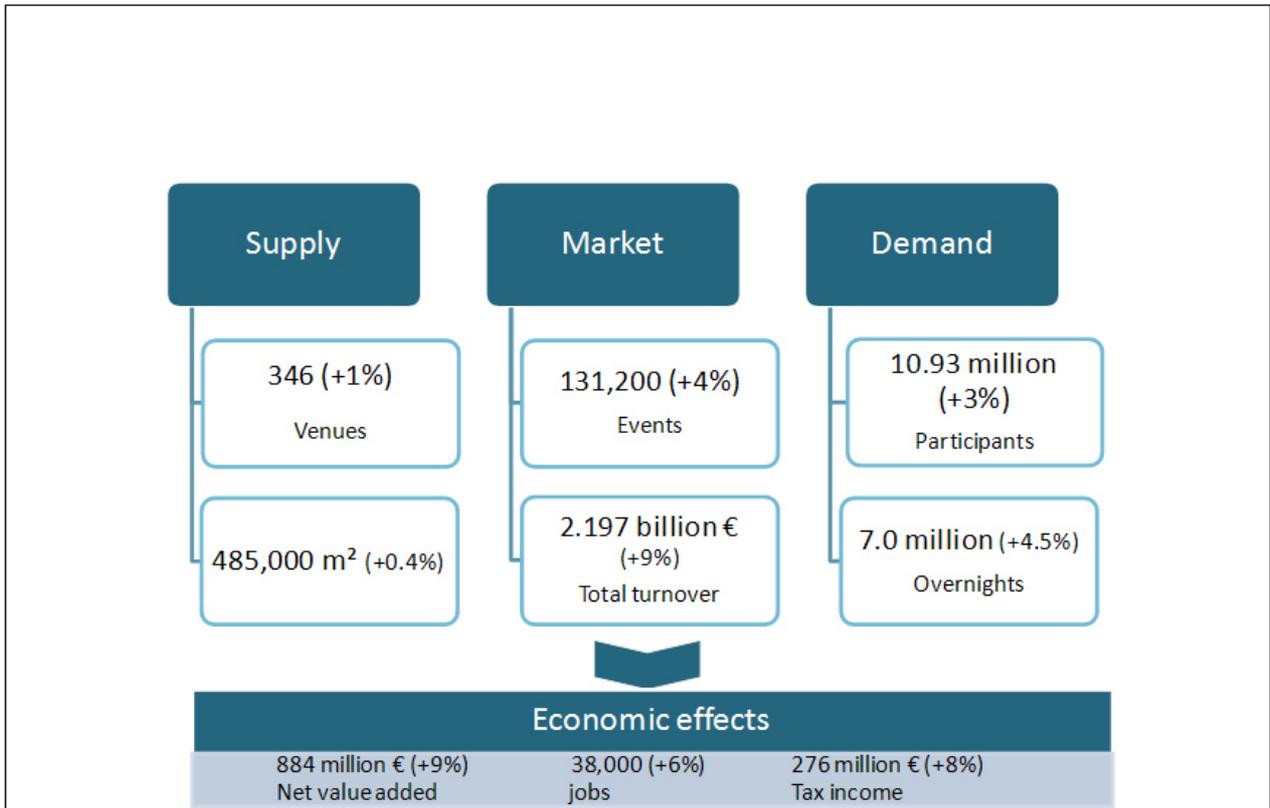
More than 80% growth in revenues from the MICE market in the past 10 years (in € million)



Source: ghh consult 2015 per congress-berlin.net

- The **average expenditure per participant** was around €201 in 2014, up from €190 the year before.
- The number of full-time jobs attributable to the MICE sector in Berlin rose from 36,000 in 2013 to some 38,000 in 2014, representing an increase of approximately 5%.

Key figures for the Berlin conference and convention market in 2014



Source: ghh consult 2015 per congress-berlin.net