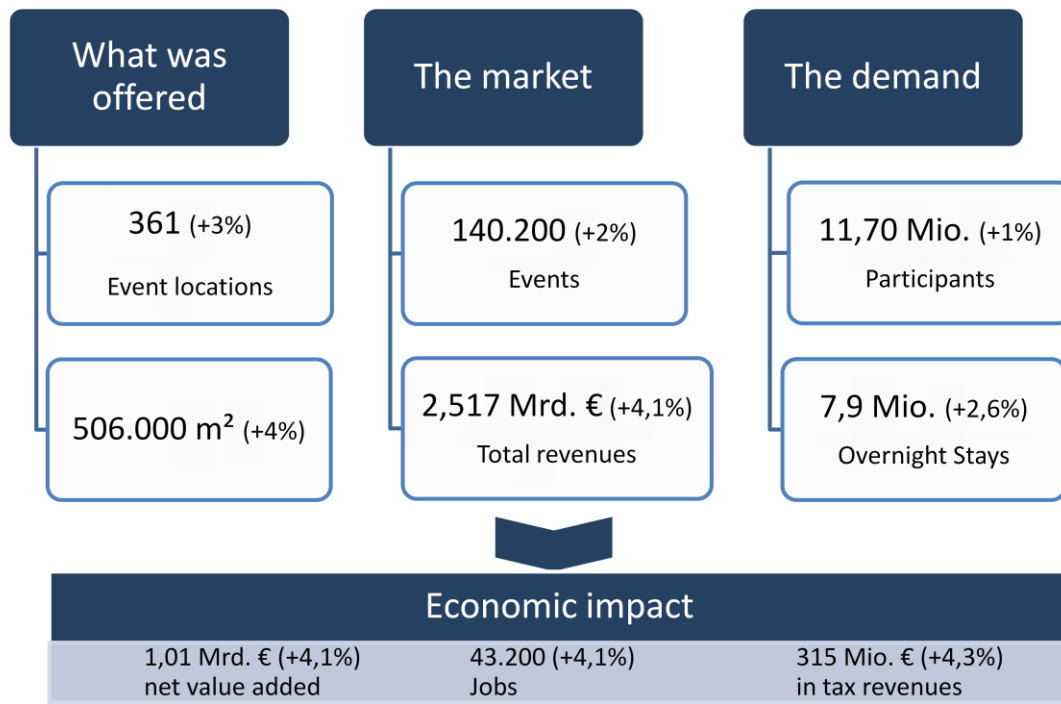


Convention Statistics Berlin 2017

convention.visitBerlin.de

1. Executive summary: key figures and developments in 2017

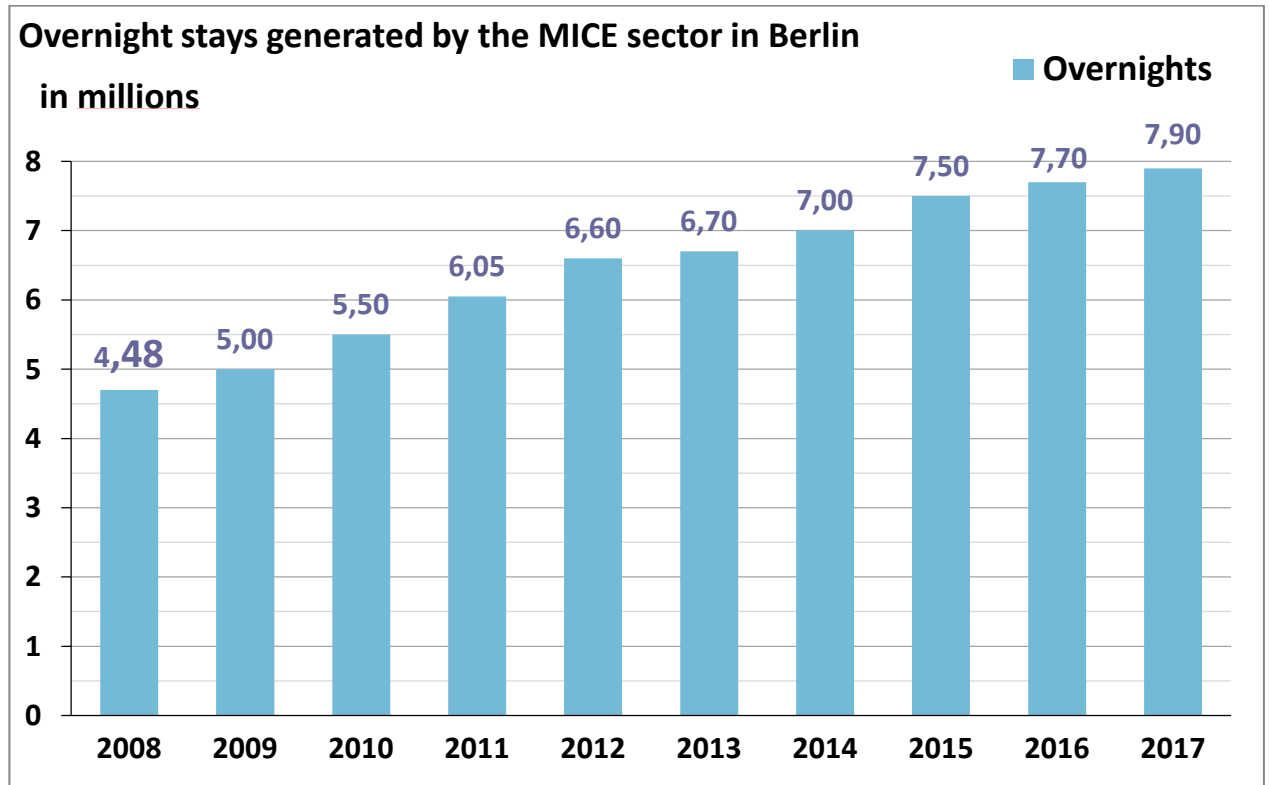
- Key figures for the Berlin conference and conventions market in 2017



Source: ghh consult 2018 taken from congress.net

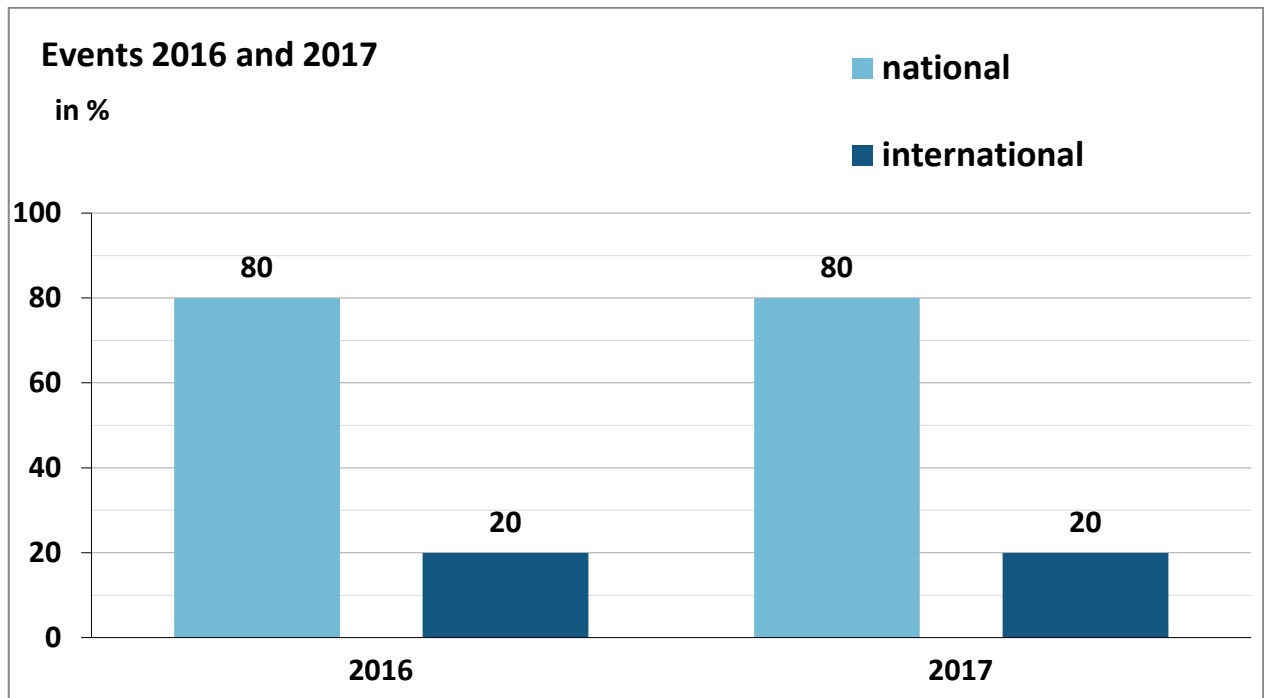
- In 2017, around 140,200 events were held (+2.0%) with around 11.7 million participants (+1.0%).
- The number of events has risen by 34% over the last 10 years, while the number of participants has risen by 44%.**
- Berlin's conference and meetings market generated about 7.9 million overnight stays in 2017. This is an increase of approx. 2.6% over the previous year.
- Over the 10-year comparison, this represents a growth of 68%. **This further underlines the importance of the MICE sector for the Berlin hotel industry.**
- The share of the MICE market in the total income generated by overnight stays in Berlin was around 25% for 2017.

More than 68% growth in the number of overnight stays for the conference and conventions market



Source: ghh consult 2018 taken from congress.net

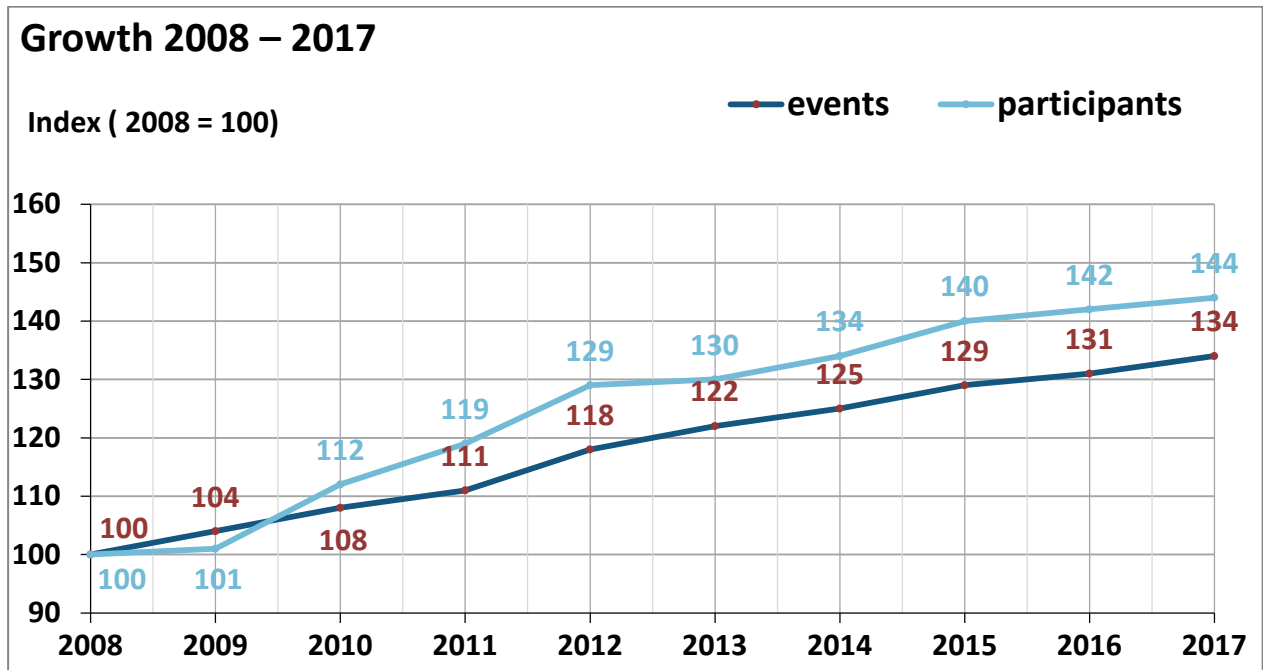
- **The leading sectoral cluster** in the Berlin meetings market is the **medical/pharmaceutical/healthcare** sector, with a share of **26%**. The **political/public institution** sector takes second place with **11 %**, followed by **IT/digital economy (11%)**, a sector that that is also extremely important for Berlin. This is followed by the financial/insurance industry segment with 10%.
- Around **20%** of the events in Berlin in **2017 were on an international scale**. At a good 80%, the majority of organisers came from Germany. This underlines the international appeal of Berlin as a MICE destination. **Just under 15%** of organisers come **from Europe**, with **Great Britain** playing an important role here, with **4.1%**, and **10.6%** of organisers coming from the **the rest of Europe**. The North American continent, with the **USA and Canada**, also has a big impact, with **3.1%**. The *visitBerlin* Berlin Convention Office, with its representatives and corresponding marketing activities, is thus operating successfully in its key markets.



Source: ghh consult 2018 taken from congress.net

- A definitive role here is played by the Berlin **conference hotels**:
125,600 events (+4.3% compared to 2016)
 with around **7.8 million participants** (+4.1% compared to 2016) were recorded.
- The **conventions centres** saw around **4,100 events** (+82.2%) with around **1.25 million participants** (+11.6%) in 2017. This is an impressive year-on-year growth for this category. The increase is attributed to the fact that the hotel "Estrel Berlin – Hotel & Congress Center" is being included in the "congress centres" comparison group for 2017 and beyond. This once again clearly indicates the need for a new, large congress centre in Berlin. **The existing venues have reached their capacity limits**; new capacity is needed in order to win new, large meetings for the German capital.
- The **10,500 events** (-29.1%) in 2017 in the so-called **locations** category saw roughly **2.65 million participants** (-22.4%) registered. This clearly shows that demand has shifted in 2017 from the "locations" to the "congress centres" and also into the additional event capacities of the Estrel Berlin.
- Overall, it can be said that the Berlin conference and congress market has once again seen growth in 2017.** The consistent marketing activities of the BCO in the relevant markets, the attractiveness of Berlin as a MICE destination, and the good economic situation both here in Germany and worldwide were crucial drivers in this.

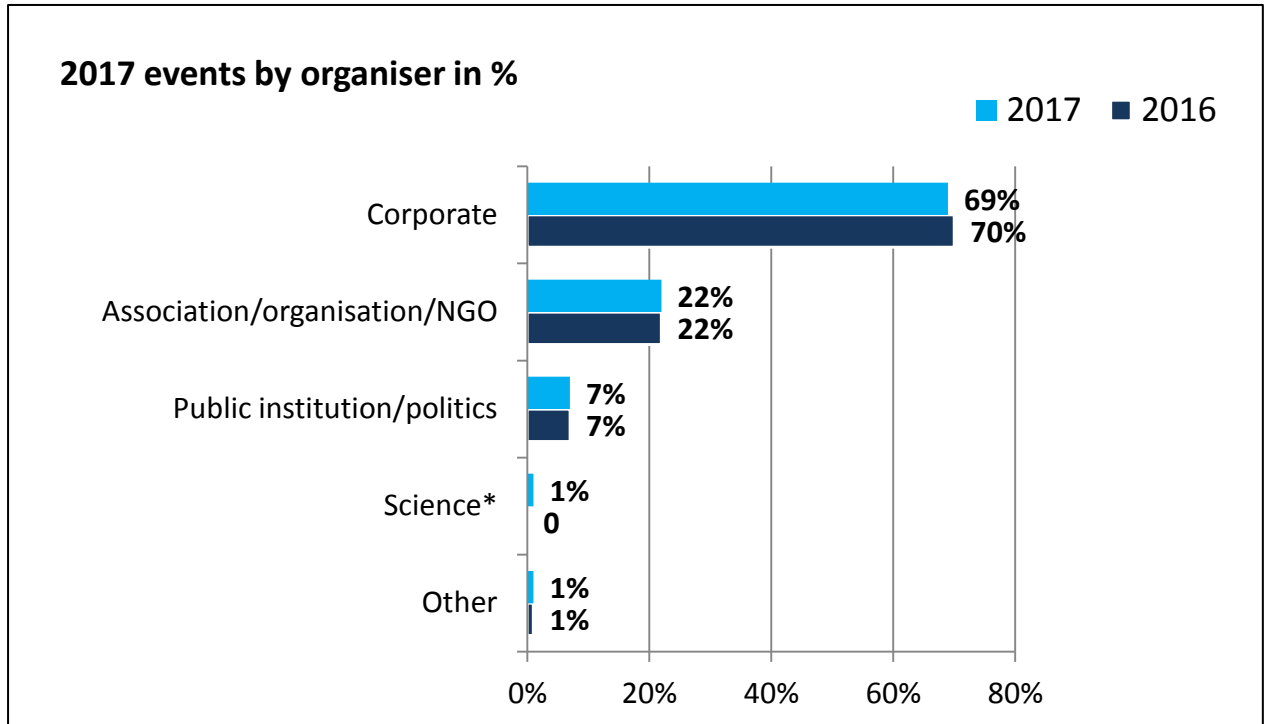
Strong growth in the number of events and participants in terms of index values.



Source: ghh consult 2018 taken from congress.net

- The make-up of the events that took place by size (number of participants per event) remained largely constant in 2017.
 - The proportion of **events with up to 100 participants** was **83.7%** in 2016, and thus one percentage point below the value of the previous year (84.7%).
 - The proportion of events **with more than 1,000 participants** increased to **0.9%** in 2017 (2016: 0.5%).
- **The average number of participants per event in Berlin in 2017 was 85 and thus slightly above the level of the previous year (2016: 84 people).**
- **On average, events lasted 2.0 days in 2017, unchanged from the year before. For events held at hotels, the average length was 2.1 days in 2017, while congress centre events lasted 1.7 days on average, and events at other locations lasted 1.3 days on average. Again, there was no change compared to the previous year's figures. Berlin remains attractive as a location for multi-day events.**
- The share of **one-day events** lay at **62%** in 2017, one percentage point lower than in the previous year (63%); **multi-day events**, by contrast, saw a one-percentage-point increase in 2017 (38%, previous year: 37%).
- When one looks at the type of event, it was the **"conferences and meetings"** sector that shaped 2017 in Berlin, with a share of **49.1%** of the market (previous year: 48%). Here there was a slight shift at the expense of the **"conventions"** sector – **8.2%** compared to 9% in the previous year. (Page 23: Definition of event types).
- The private sector (**corporates**) was also a leader in the organisation of events in Berlin in 2017: its share lay at **70%**. The national and international **associations and**

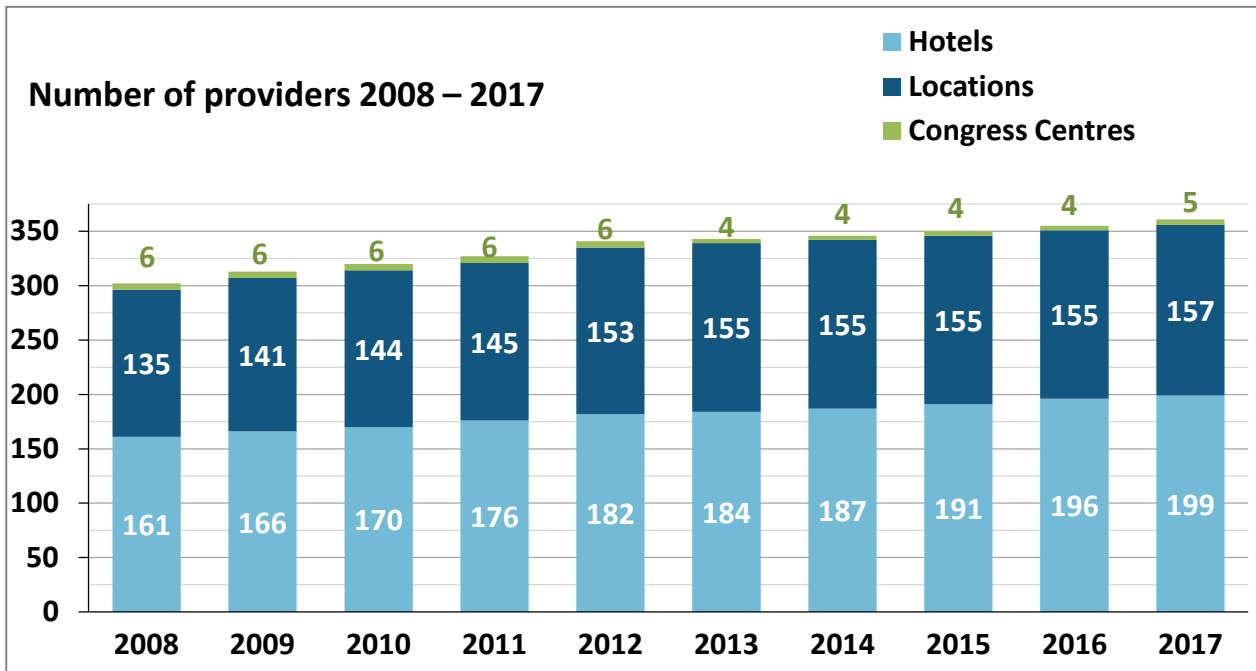
organisations contributed around one fifth (**22%**) of the events that took place in Berlin in 2017; this share thus matched the level of the previous year (2016: 22%). Events organised by public institutions accounted for 7% of the total in 2017, just as in 2016. Berlin's role as the nation's capital drives its relatively strong position in this market especially.



Source: ghh consult 2018 taken from congress.net

- "Science" was recorded for the first time in 2017; here, a plausible estimate of the respective shares of the previous year's period was made.
- There were minor changes in the distribution of events by booking method: in 2017, direct bookings accounted for 85% of all events (previous year: 90%); PCOs accounted for 11% of the bookings (previous year: 9%) and approx. 4% were attributed to "other" and "internet portals" (previous year: 3%).
- Since data began to be collected about the Berlin MICE market in 2002, the conference and congress sector in Berlin has seen very dynamic growth. The number of providers has risen from 245 in 2002 to 361 in 2017, representing an increase of 47%.

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



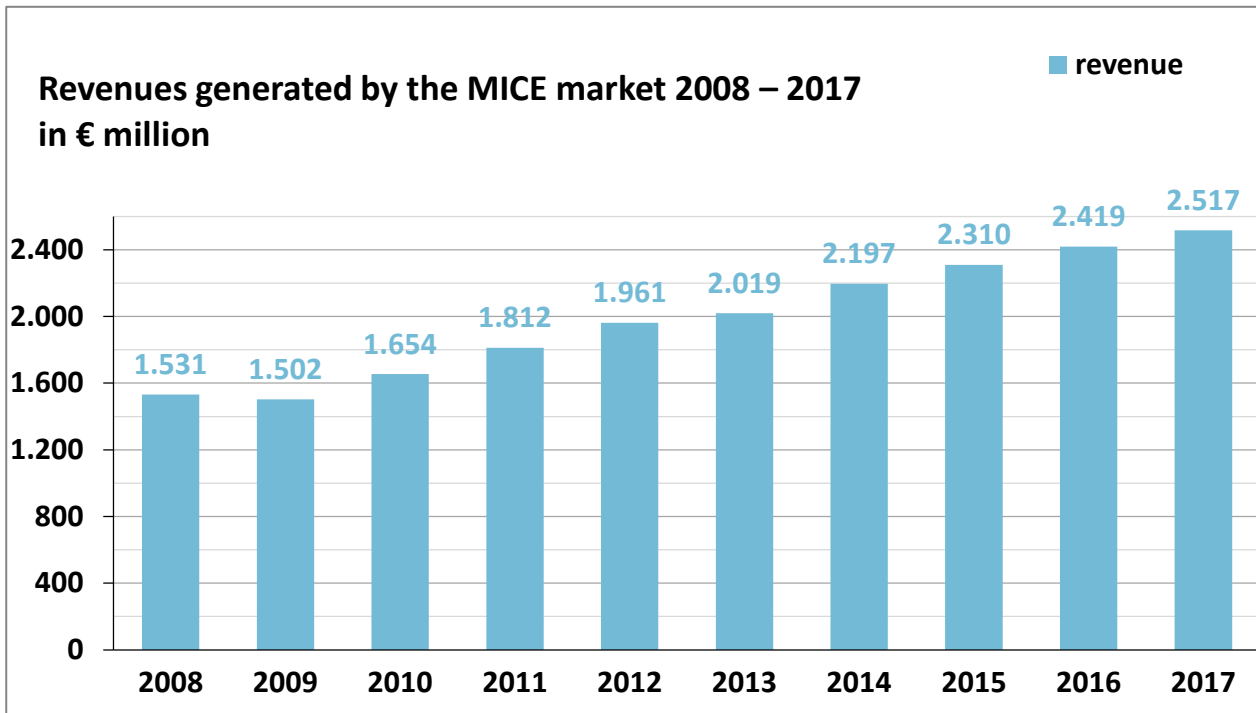
Source: ghh consult 2018 taken from congress.net

Note: Since the start of 2017, the Estrel Hotel has been counted among the "congress centres". (Previously was in the hotels category)

- The 361 providers identified for 2017 offer a total conference area of around 506,000 m².
- The largest contingent in terms of number of providers is made up by the 199 hotels on the list (equalling 55% of providers), which together offer about 110,000 m² of events space (22% of the total available space).
- By area alone, it is the 157 "unusual event venues" (locations, 43% of providers) with 320,000 m² of event space (63% of the total area) that again take the top spot.
- The five congress centres (congress, town and multi-purpose halls) make up 1% of the providers, but provide around 76,000 m² (15%) of the available space, and are thus once again important cornerstones of the capital's congress market.
- More than a third (35%) of the conference hotels and all congress centres participated in congress.net in 2017. Together, they represent some 70% of the total space offered by venues of this type.

The 36 "locations" that participated in congress.net offer about 55,000 m² in floor space. This corresponds to 18 % of the total area for this category.

More than 64% growth in revenues from the MICE market in the past 10 years



Source: ghh consult 2018 taken from congress.net

- **The economic implications for Berlin are considerable. The gross revenue generated by conference and congress participants (hotel, catering, retail, leisure and culture, transport, other) amounted to €2.517 billion in 2017, which represents an increase of 4.1% compared to the previous year (2016: €2.419 billion).**

In the past 10 years, the revenues generated by Berlin's MICE market have risen by approx. 64%.

- **The average expenditure of an event participant who stays overnight was around €246 per day in 2017.** Those who came to the city only for the day spent an average of €84 per day. This means that the **average expenditure per meeting participant per day was €215 in 2017, higher than the previous year (€209).**
- **The number of full-time positions initiated and secured by the MICE industry in Berlin increased from 41,500 in 2016 to around 43,200 full-time positions in 2017. This corresponds to an increase of around 4.1%.**

2. MICE market Berlin: Success factors and milestones of an impressive development

A success story: Berlin's MICE market and the Berlin Convention Office since 2001

- Since 2001, Berlin's MICE market has developed very dynamically, emphatically evidenced not least by the city once again taking the 4th spot in the ICCA rankings for 2016. The impressive development of the congress market in Berlin can be seen from a comparison of essential parameters against the last 17 years:

| | 2001 | 2016 | Change |
|------------------------|---------------|---------------|--------|
| Events | 91,000 | 140,200 | +54 % |
| Participants | 4.2 million | 11.7 million | +179 % |
| Overnight stays | 2.27 million | 7.90 million | +248 % |
| Total revenues | 0.920 billion | 2.517 billion | +174 % |
| Job positions | 17,000 | 43,200 | +154 % |

- The *visitBerlin* Berlin Convention Office (BCO) has played a decisive role in this growth since 2001. Since then, the BCO has brought more than a thousand events to the German capital, including European and global conventions for international organisations.
- Amidst strongly increasing international competition, Germany is able to claim **second place** (after the USA) in the **international ICCA statistics** (International Congress and Convention Association). The ICCA statistics count conventions of international associations that take place at regular intervals in different countries where at least 50 per cent of the participants come from abroad.
- The ICCA statistics are globally recognised as the key indicator in this field, and in 2016, **Berlin** took the **fourth spot** with 176 rated events, ahead of Singapore (151).

Berlin: the leading location for first-class medicine and a major hub for international health tourism

- Medicine and the related disciplines of science and research make up one of the most important sectors in Berlin's congress market.
- Berlin's success as a major healthcare destination reflects its 300-year history as a centre for health and science. More than a dozen Nobel Prize laureates have been based in Berlin over the years, including researchers like Rudolf Virchow and Robert Koch.

Berlin: international hotbed for start-ups

- For years, Berlin has been one of the main international centres for start-up companies. The capital is undisputedly the No. 1 city for start-ups in Germany in terms of investment volume and venture capital won, standing shoulder-to-shoulder with other European centres such as London, Stockholm, and Paris.

Berlin: top international destination for tourism, culture and media

- Success in the MICE market has been unwavering, despite turbulence in the aviation industry and increased competition. As ever, Berlin is a tourism, culture and media destination that is constantly reinventing itself and it attracts visitors from all over the world.
- The attractiveness of Berlin as a destination is reflected, for example, in the Berlinale, one of the most popular film festivals in Europe, which marked already its 67th anniversary in 2017. As one of the top media events in the film industry, the Berlinale attracts around 20,000 trade visitors and journalists from 80 countries each year.
- Visitors can choose from some 1,500 events held in the German capital each day. With world-renowned museums and avant-garde galleries, virtuoso orchestras and electro beats, prominent theatres and open-air acts, every day in Berlin offers amazing variety, and that goes for those attending conferences and conventions too. The year 2017 saw major events such as the IGA Berlin, the German Protestant Church Congress and the International German Gymnastics Festival.

Berlin: continued hotel boom in the capital

- The hotel boom in the capital also appears to be unabated: a multitude of new hotel projects, with a total capacity of just under 4,000 rooms, are currently announced or in planning for 2017 to 2020.
- The Estrel Congress & Messe Center, for example, currently offering 1,125 rooms, will be adding a further 800 rooms as construction of the 45-storey Estrel Tower is completed. The new tower will stand 175 m tall, about two and a half times higher than the current Estrel Hotel, and will thus become the tallest high-rise hotel in Germany.
- Another 10 projects with around 3,000 rooms are under construction or in planning.



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