

Meeting- & EventBarometer Germany 2013/14

The Germany-based study of the congress and events market

Press conference | 20 May 2014 | IMEX Frankfurt

Method



Online survey in March/April 2014

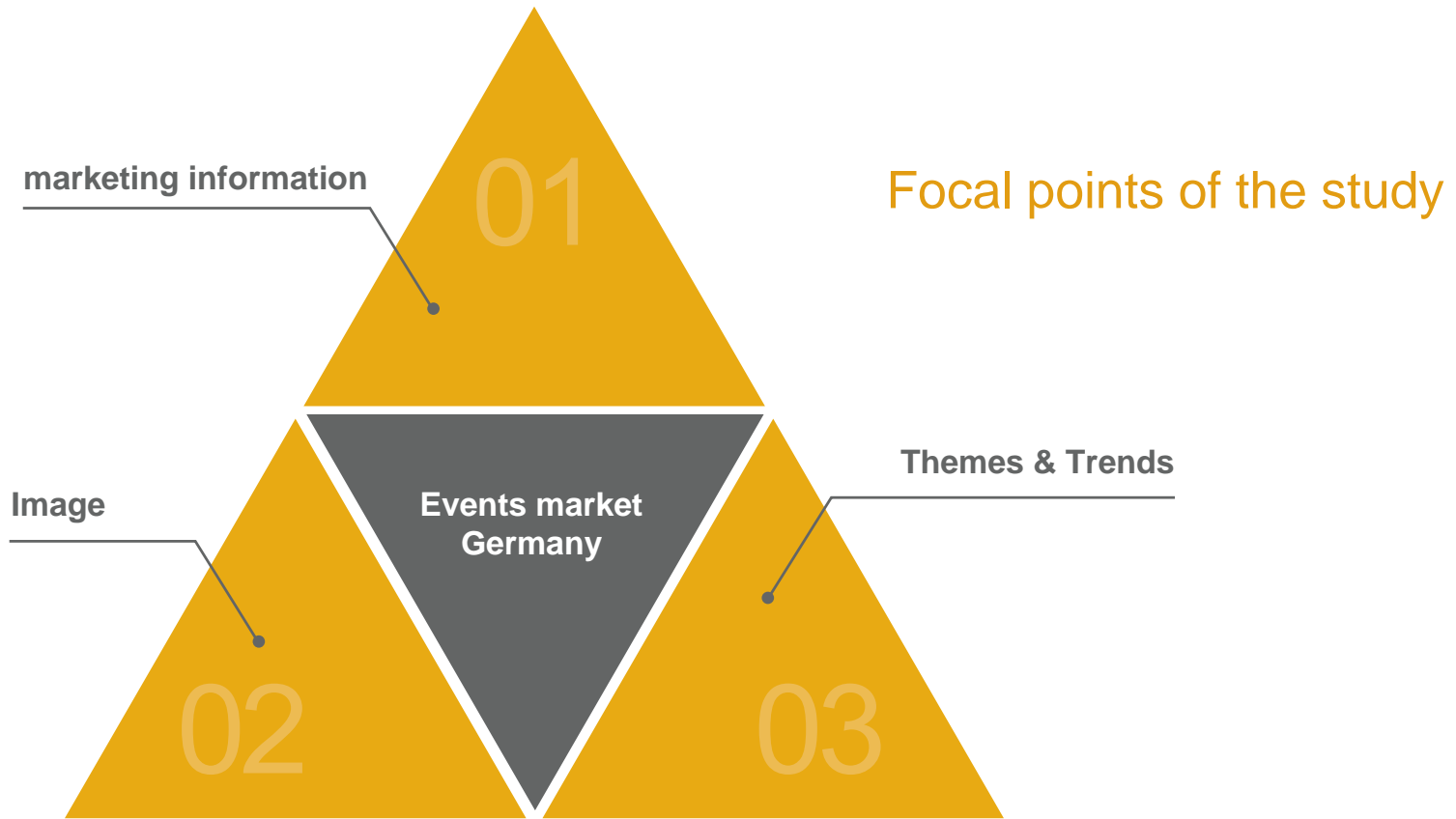
- ca. 7,000 event venues in Germany (> 100 seating places in the largest room)
- ca. 8,000 organisers worldwide



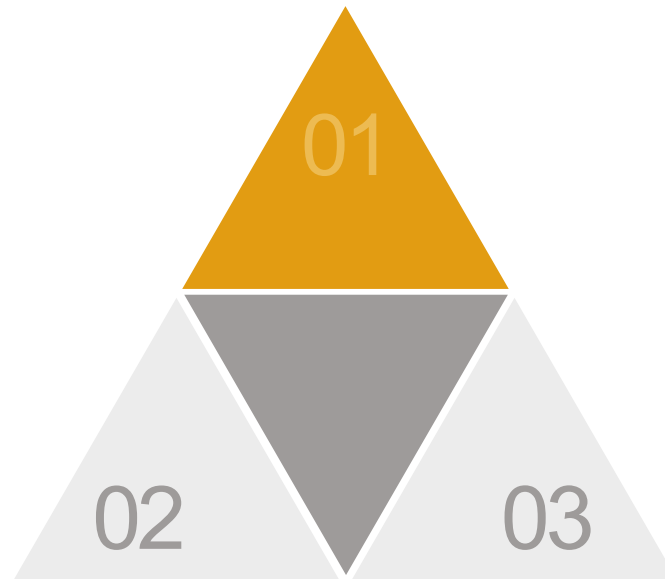
Structure of responses

Providers: 35% event centres –
43% meeting hotels – 22% event locations

Organisers: 44% Germany – 22% Europe – 34% outside EU
43% agencies – 32% associations – 25% companies



Market Information



Germany is the leading European destination for congresses

Germany takes first place in Europe for the 10th time in succession and second place in the world



ICCA country ranking

1. USA
2. Germany
3. Spain
4. France
5. Great Britain



ICCA city ranking

1. Paris
2. Madrid
3. Vienna
4. Barcelona
5. Berlin

Basis: ICCA International Congress and Convention Association 2013, Country & City Rankings

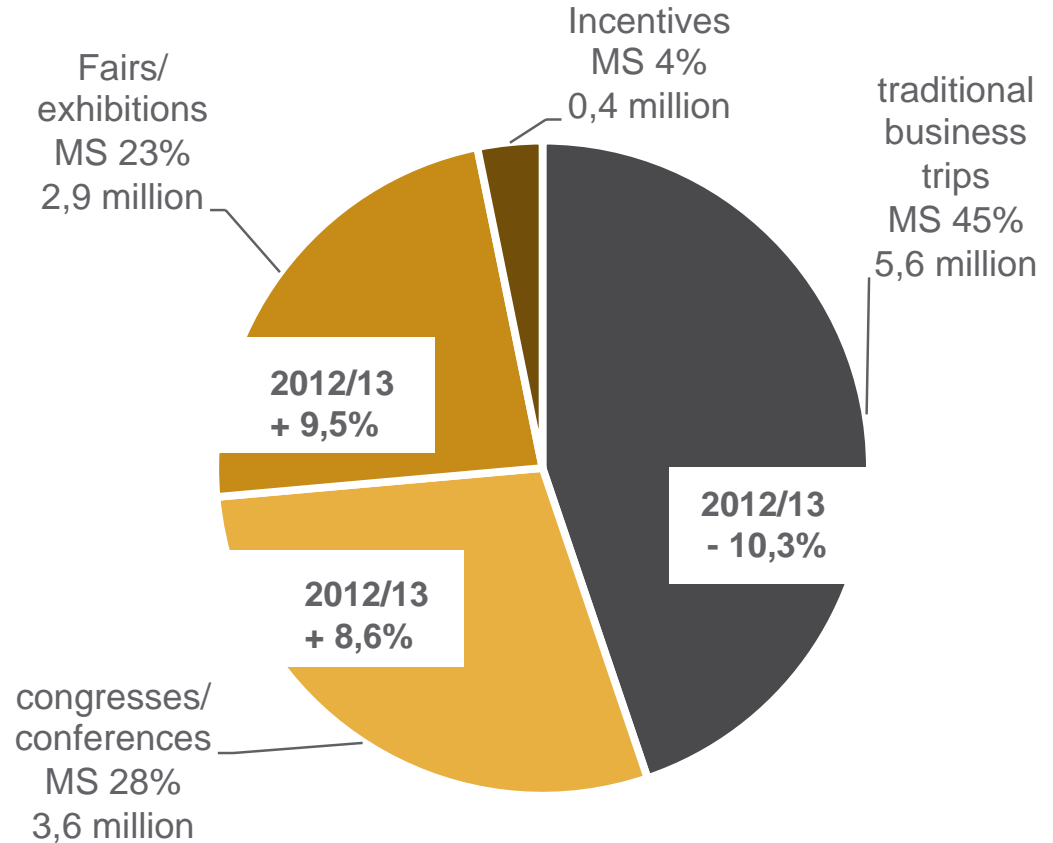
Promotable business trips planned for growth

Europeans' business trips to Germany rose in 2013 with an increase of +0.6% to 12.6 million

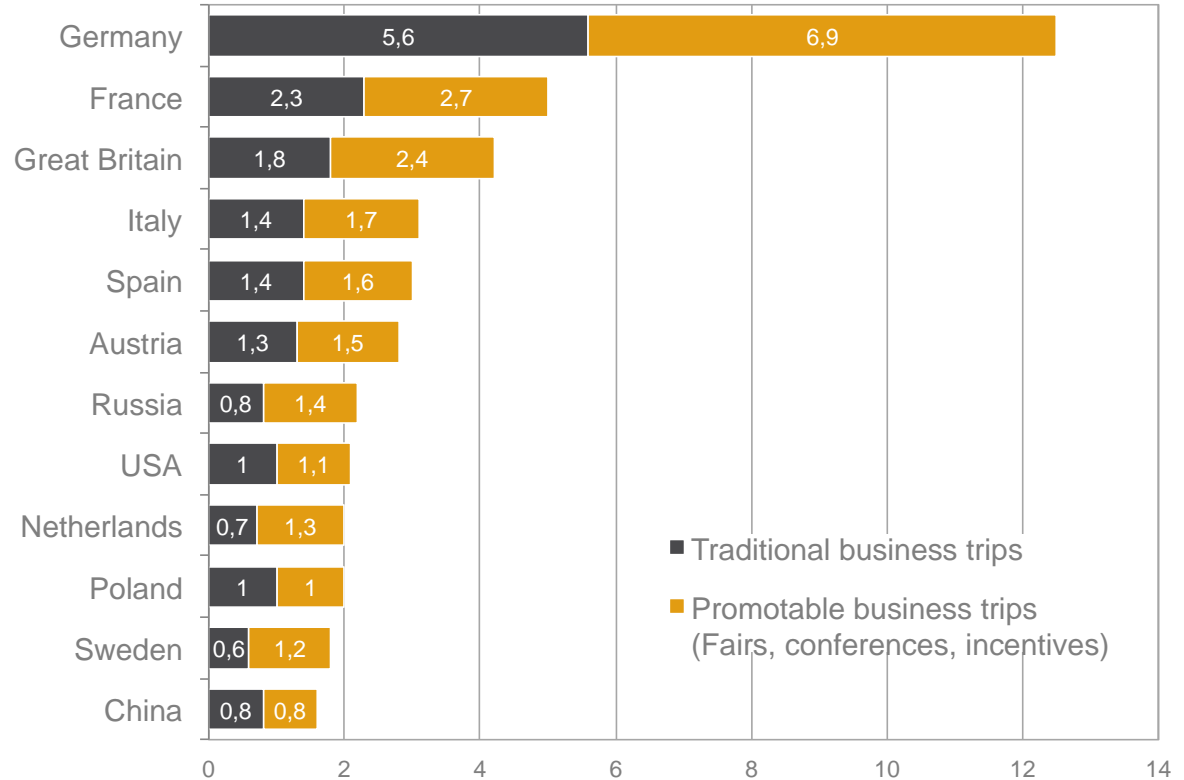
Promotable business trips
MS 55% 6.9 million

2012/2013
+ 11.8%

MS = market share | Source: DZT/WTM, IPK 2014
Differences caused by rounding

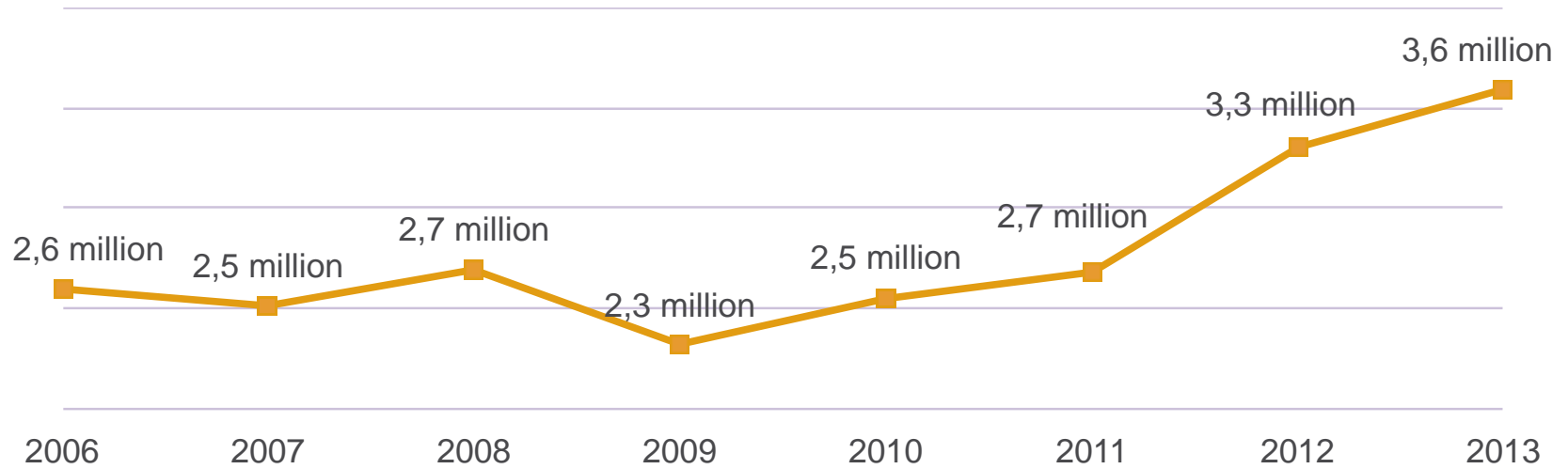


Germany takes first position among Europeans' top 10 business travel destinations



Business trips in millions
Basis: DZT/WTM, IPK 2014

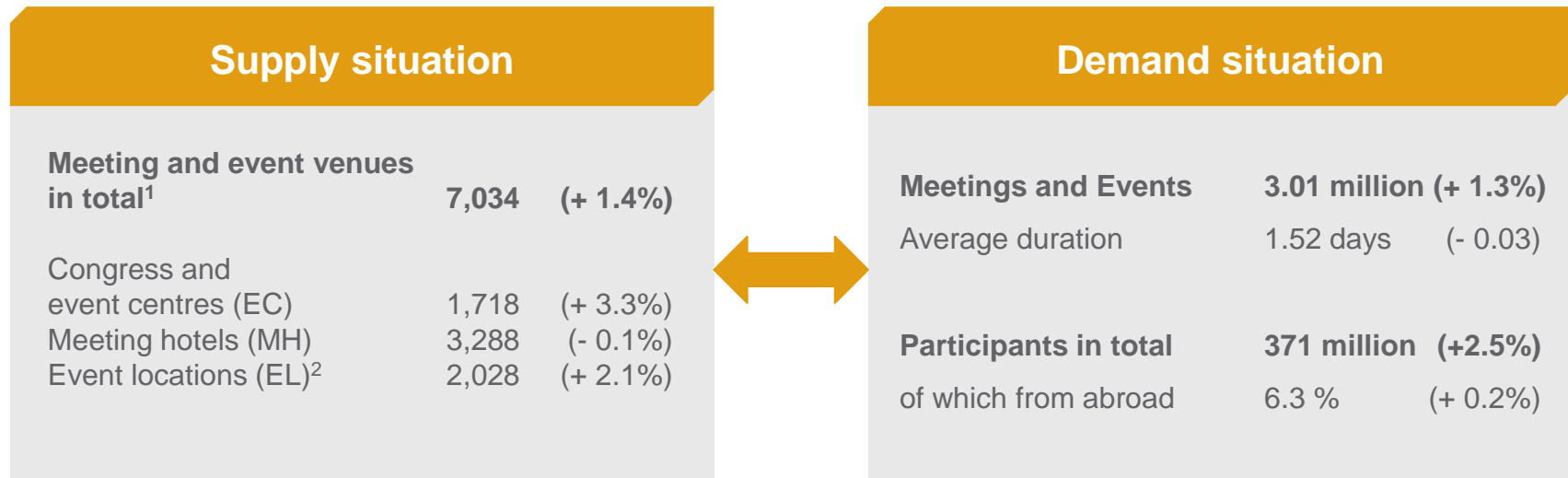
Meetings and congresses are the drivers of the market for business trips



Business trips by Europeans to Germany for meetings and congresses

Basis: DZT/WTM, IPK 2014

Slight growth in the German meeting and events market

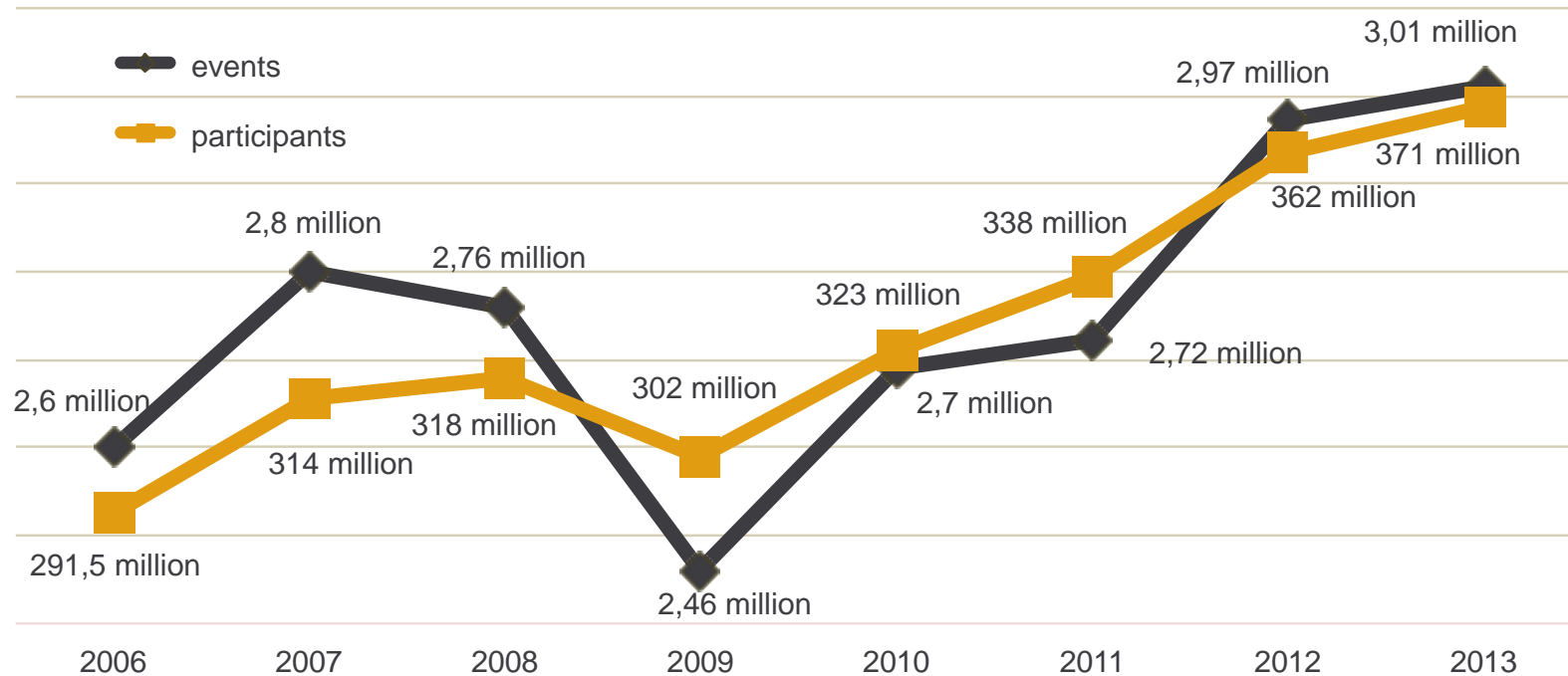


¹ Operations with at least 100 seating places in the largest room with seating in rows

² Castle, monastery, museum, production hall/locomotive housing, studio, leisure park, zoo, educational establishment/college or university, airport

Basis: EITW, own research and provider survey 2014: various enquiries

Meetings industry in Germany showing slight growth trend at a high level



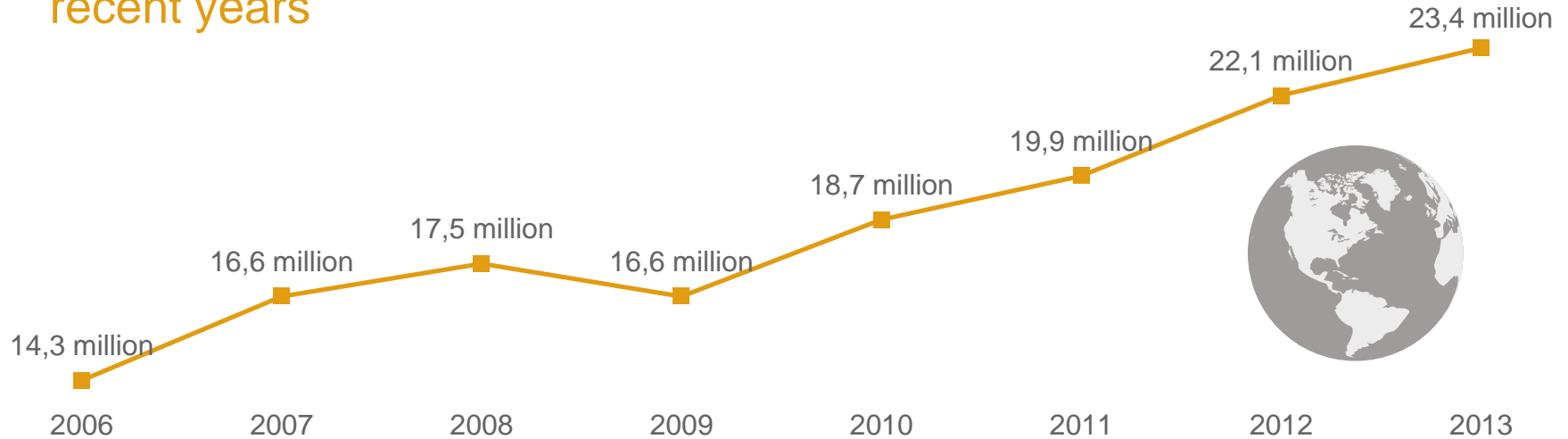
Basis: EITW, provider questionnaires 2007-2014: overall number of events, total number of participants

How has the market changed in recent years?



Meetings are becoming more international

Constant increase in international participants over recent years



International participants in meetings and events in Germany

38% of providers and 45% of organisers believe that there will be a further increase in the importance of international meetings and events in the future

Basis: EITW, provider questionnaires 2007-2014: (total number of participants) – of which from abroad in %

Budget increases

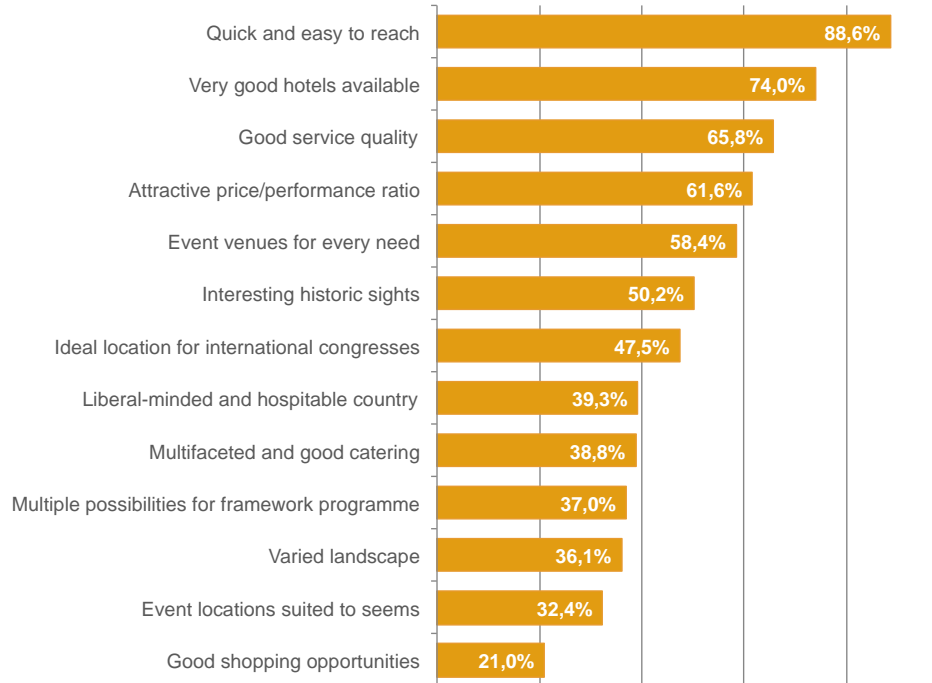
The proportion of large budgets (above € 500,000) has almost doubled since 2007.



Basis: EITW, organiser questionnaires 2007-2014: companies/associations: How high was your total budget for conferences and events in 2013?
Agencies: How high was the average of budgets you managed on behalf of companies sponsoring events (total per company)?



What is Germany's image as a country for meetings?



Germany stands for good availability, good supply and service quality.

In the case of foreign organisers, the attractive price/performance ratio!

Basis: EITW, provider and organiser questionnaire: Please choose aspects that are applicable for the event destination Germany from the list (multiple answers allowed)

In terms of popularity among organisers questioned, Germany comes higher than the USA in a world comparison

- 1 **Germany**
- 2 **USA**
- 3 **Spain**
- 4 Italy
- 5 Great Britain
- 6 Austria
- 7 France
- 8 Canada
- 9 Belgium
- 10 Denmark
- Netherlands
- Switzerland



Basis: EITW, organiser questionnaire: Preferred countries WORLDWIDE

Large German cities with ongoing popularity



- 1 **Berlin**
- 2 **Munich**
- 3 **Frankfurt/Main**
- 4 Hamburg
- 5 Cologne
- 6 Düsseldorf
- 7 Stuttgart
- 8 Hanover
- 9 Leipzig
- 10 Nuremberg

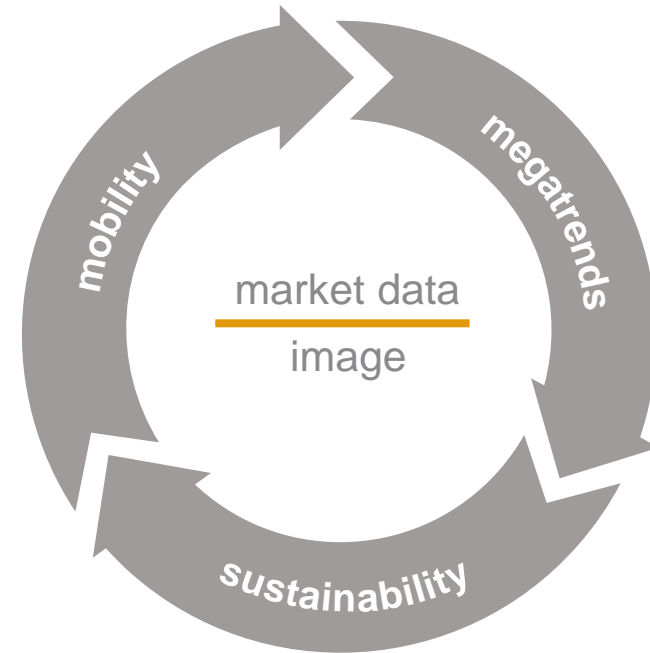
Basis: EITW, organiser questionnaire: Preferred major cities in Germany



Themes & Trends

What drives the sector?

- ➔ A look at the future as well as current challenges and trends serve to secure and further develop Germany's successful position as a destination for meetings and congresses.



Provider survey (event venues) in Germany and organisers in Germany, Europe and outside Europe



Megatrends* and specific current issues

* Source: "Meetings and Conventions 2030: A study of megatrends shaping our industry.",
Publisher: GCB German Convention Bureau e. V.

Technologisation of life and work



Cloud services for organisation and management of events are becoming more important

63% of providers and 65% of organisers agree

Other trends

- Digitalisation, social media
- More technology at events
- Online meetings – hybride events
- Mobile event-based apps
- Free WLAN
- Gamification

Basis: EITW, provider and organiser questionnaire: Please state if the following themes will increase or decrease in importance in 2014.

Sustainable development



Increasingly important: Taking into account sustainable components

82% of providers
66% of organisers

Reduction/compensation of CO₂ emissions

61% of providers
52% of organisers – say this is a trend

Basis: EITW, provider and organiser questionnaire: Please state if the following themes will increase or decrease in importance in 2014.

Event-related themes



New event formats (e.g. bar camps)

57% of providers

62% of organisers – see this as a challenge

Other trends in the events market:

Framework programme/events

Greater flexibility

Interactivity

Full service/all-inclusive

New event formats

Cost saving

Programs with added value

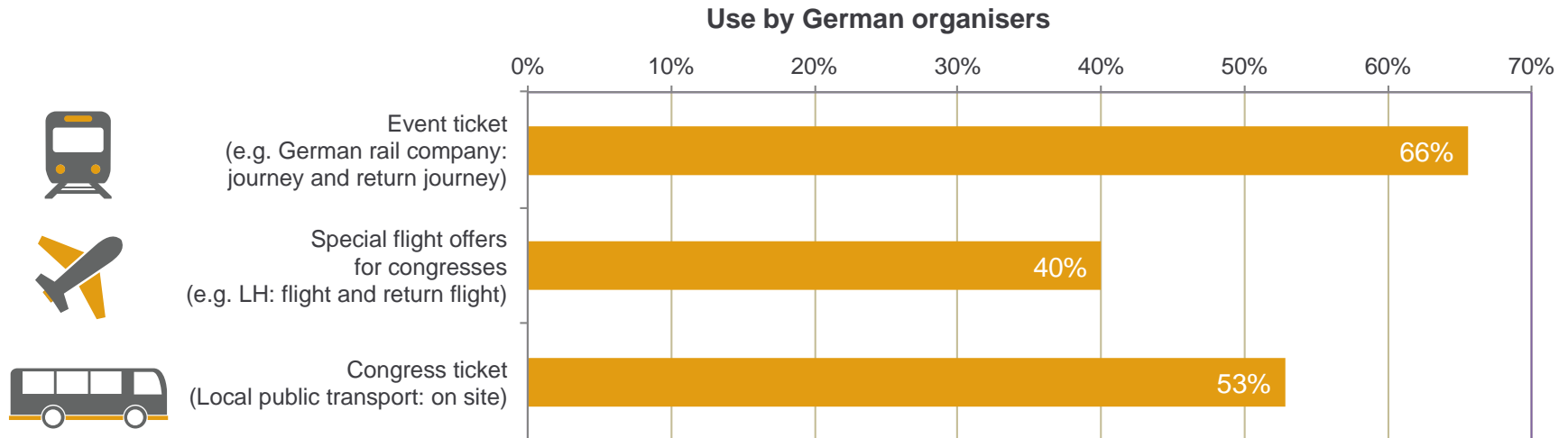
Customised events

Greater comfort/relaxation

Basis: EITW, provider and organiser questionnaire:

Which additional trends do you consider important? (free text field)

Provision for mobility is popular

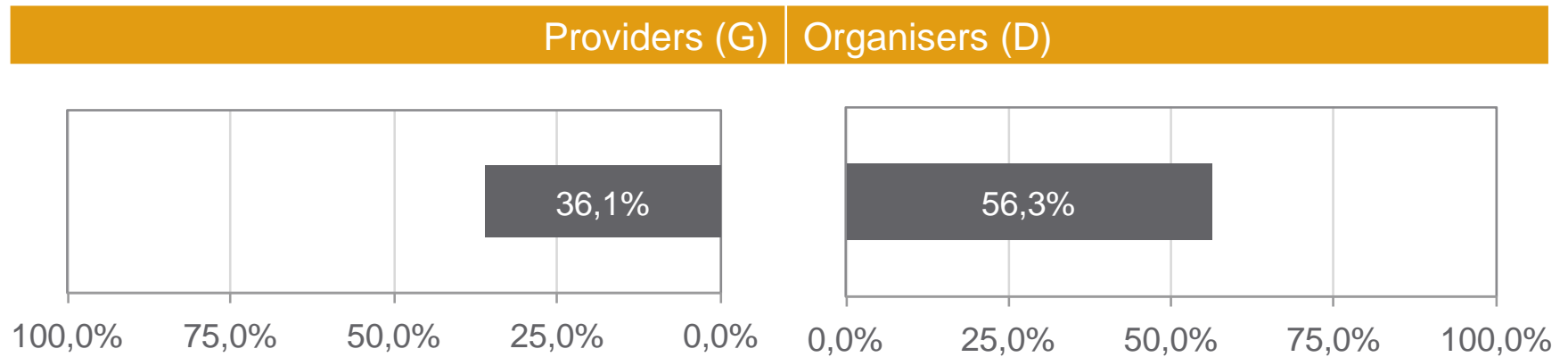


A large number of German organisers use ticket offers for events

Accessibility is the most important requirement for a decision on location by organisers.

Basis: EITW, organiser questionnaire: Companies/associations: Do you provide (sustainable) offers for the arrival and departure of participants in cooperation with transport companies? How much are they accepted? Agencies: Do you provide (sustainable) offers for the arrival and departure of participants in cooperation with transport companies and convey them to your customers? How much are they accepted?

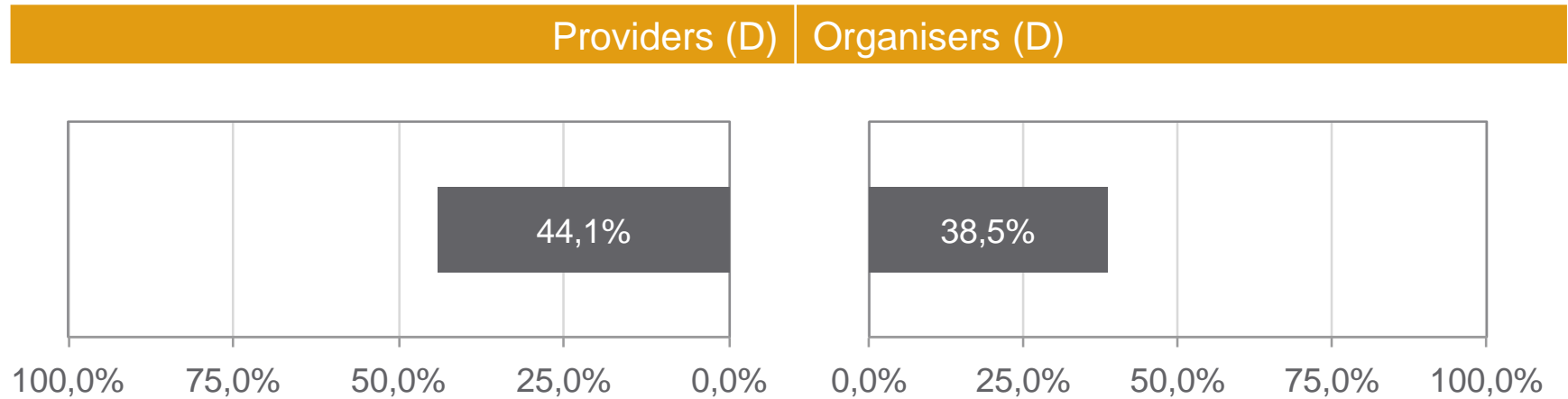
Events sector with different challenges with providers and organisers: data security



Data security IS an issue,
much more so with organisers than with providers

Basis: EITW, provider and organiser questionnaire: Where do you see the biggest challenges for the event market right now?

Challenge – further training for staff



In addition to further training, providers are occupied with the responsibility of staff recruitment.

Basis: EITW, provider and organiser questionnaire: Where do you see the biggest challenges for the event market right now? (questionnaire, free text)

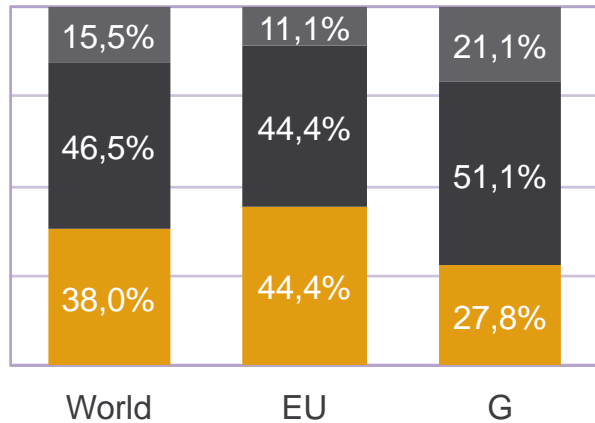
Challenges in the events market



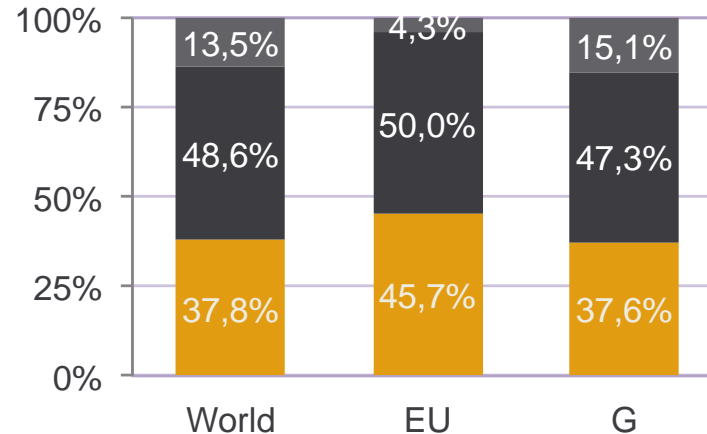
Basis: EITW, provider and organiser questionnaire: Where do you see the biggest challenges for the event market right now? (free text field)

2014 positive predictions for Europe

Level of budgets:



Number of events:

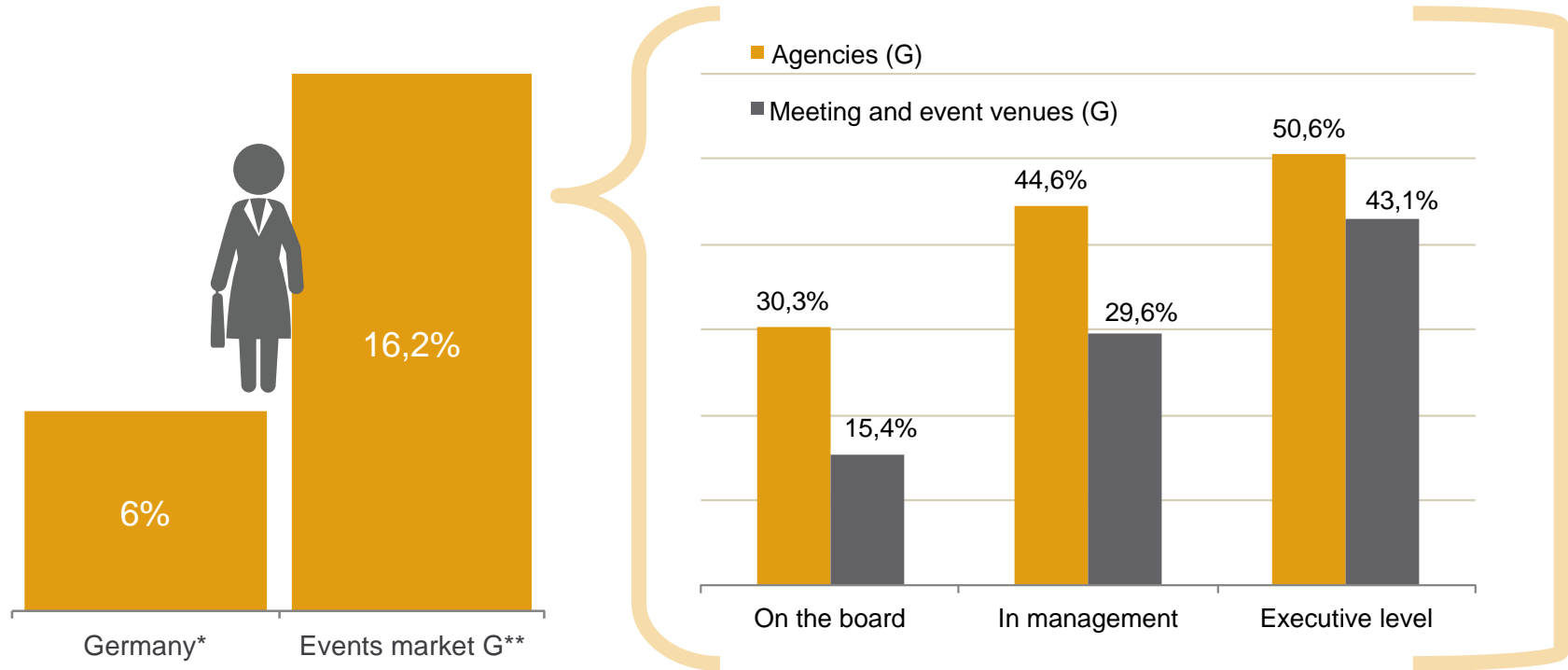


Basis: EITW, organiser questionnaire: Please estimate your events in 2014: Compared to the year before it will be...
Please estimate your budget in 2014: Compared to the year before it will be...

■ increased
 ■ unchanged
 ■ decreased
 ■ increased
 ■ unchanged
 ■ decreased

➔ Very positive predictions by organisers in Europe and across the world.
 The international market provides high potential for German providers.

Women's quota: Meetings market as an exemplary sector



* Germany: Women-on-Board-Index 2014 | ** Events market: meeting and event venues and agencies in Germany
 Basis: EITW, provider and organiser questionnaire: What is the percentage of female management in your company on the board/management/executive level.

Fazit



Meetings industry – positive, stable at a high level – including in the future.

Germany as a destination for meetings means accessibility, variety, service and price performance.

Meetings and events are becoming more international.



Challenges in the market relate especially to staff, events and technology.

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