Meeting- & EventBarometer

# Meeting- & EventBarometer Germany 2022/2023

## Study of the German congress and event market

EVVC
Europäischer Verband der Veranstaltungs-Centren e.V.

GCB
Meetings made in Germany
German Convention Bureau

Deutschland
Bei Geschäftsfreunden

EITW

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# Key Findings

Meeting- & EventBarometer

**Event market in Germany gradually recovering: Adjusted recovery already 66 %**

**Role of business events confirmed: Professionally motivated events dominate**

**Digital formats remain important: Organisers are planning more digital and hybrid events again**

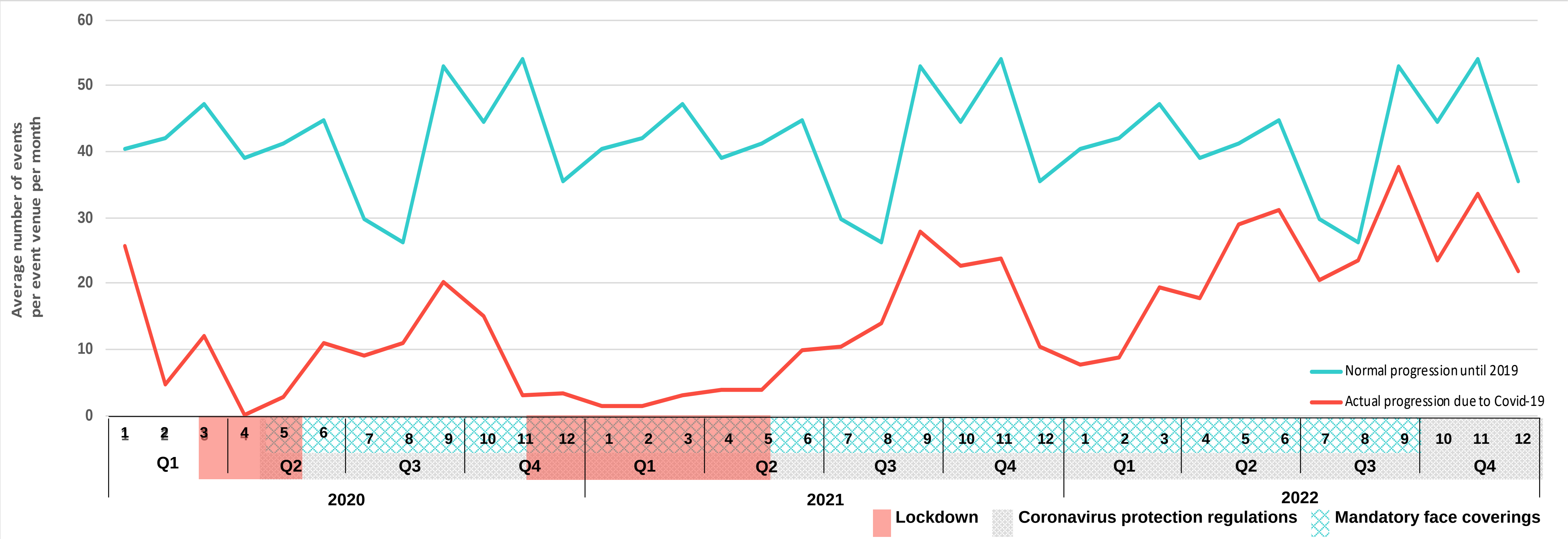
**Sustainability is increasingly in focus: organisers see saving resources as an opportunity**

**Event market resilient: challenges of staff, inflation and energy**

**Future outlook optimistic: suppliers and organisers expect budgets to increase**

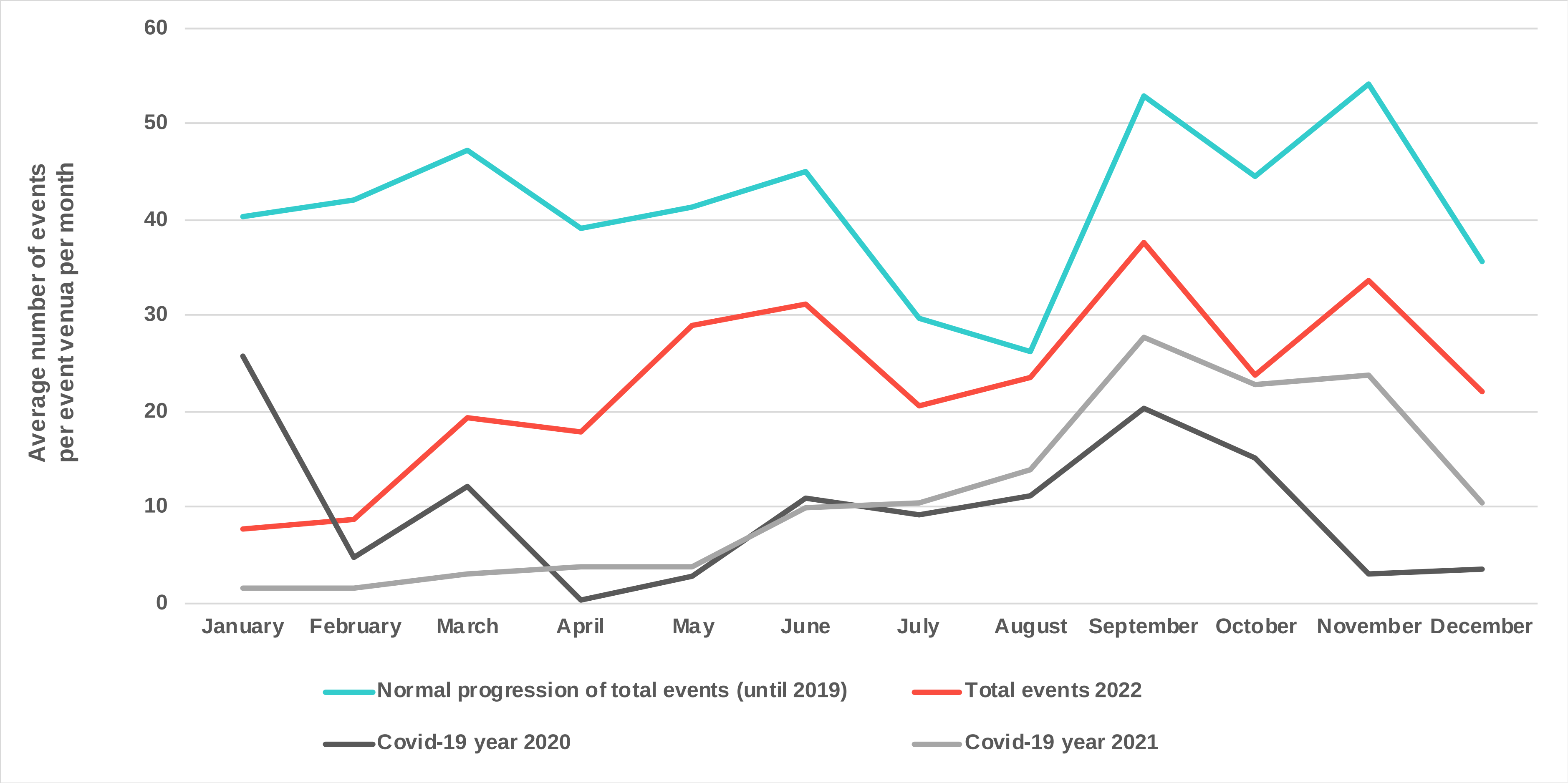
# 02
# Demand-side Trends

# Recovery – Overview of the development from 2020 to 2022



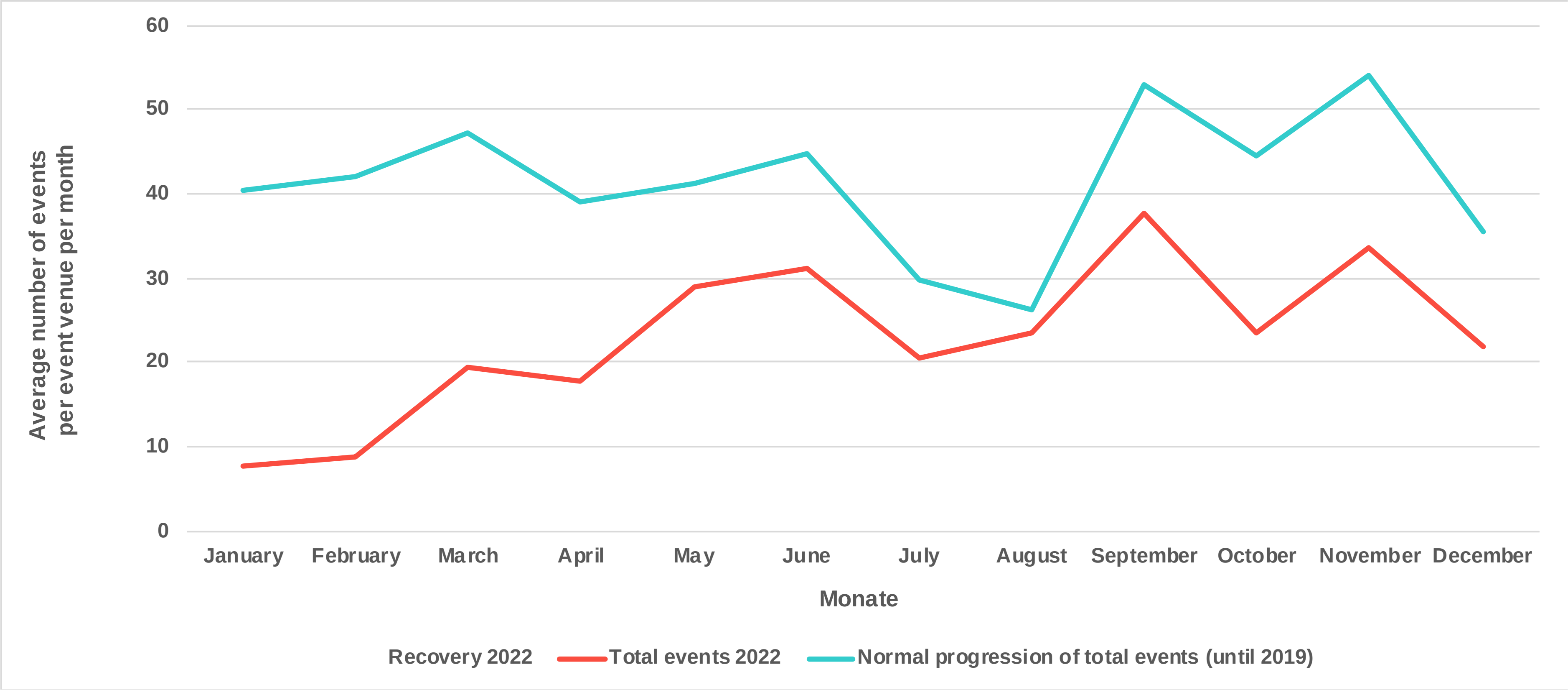

**Own calculations EITW 2020-2023**

# Recovery – annual overviews of the three Corona years in comparison




**Own calculations EITW 2020-2023**

# Adjusted recovery: From Q2 – 66% compared to 2019

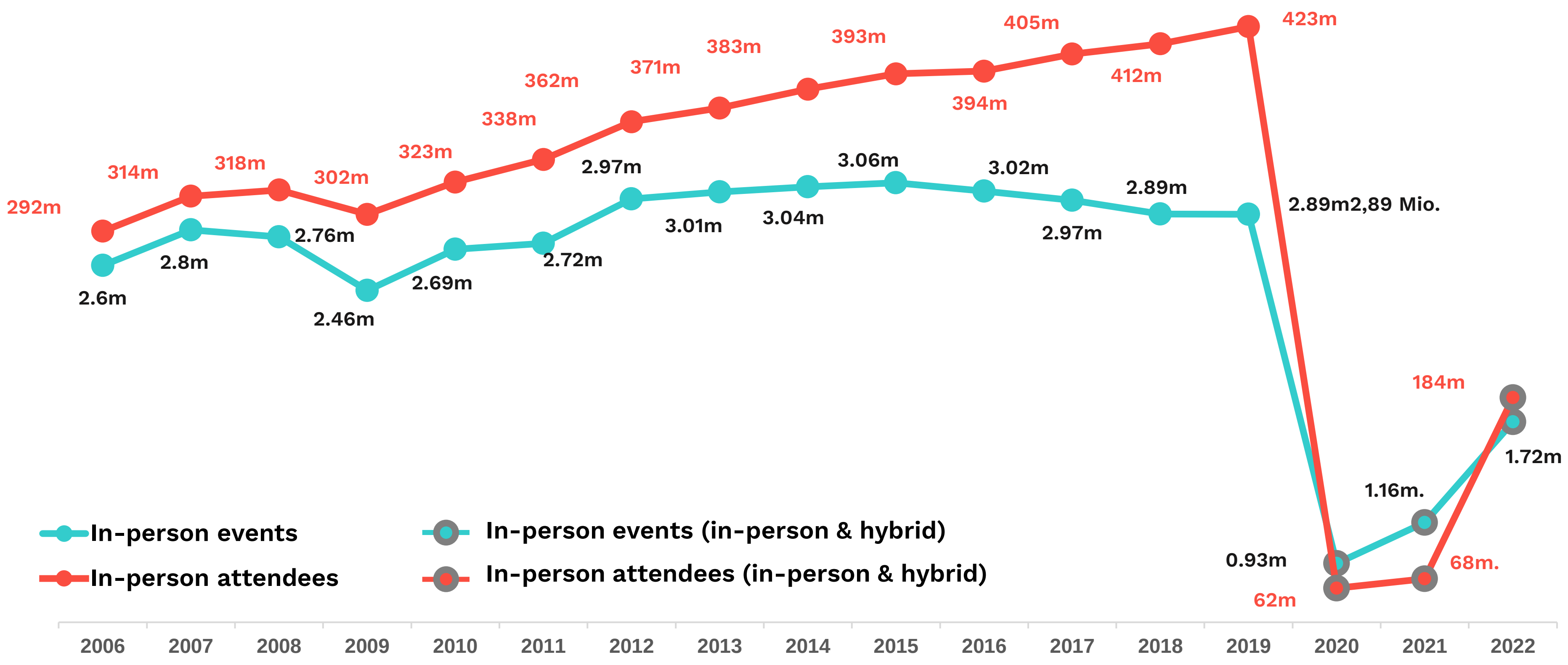



Recovery starts from Q2 in 2022. 65.7 per cent of normal performance for the period was regained in terms of event volume from Q2 to Q4.

Eigene Berechnungen: EITW 2020-2023

# Demand: in-person attendees and events

## Development: in-person attendees and events from 2006 to 2022




Compared to 2021, the number of in-person events and attendees increased significantly in 2022.

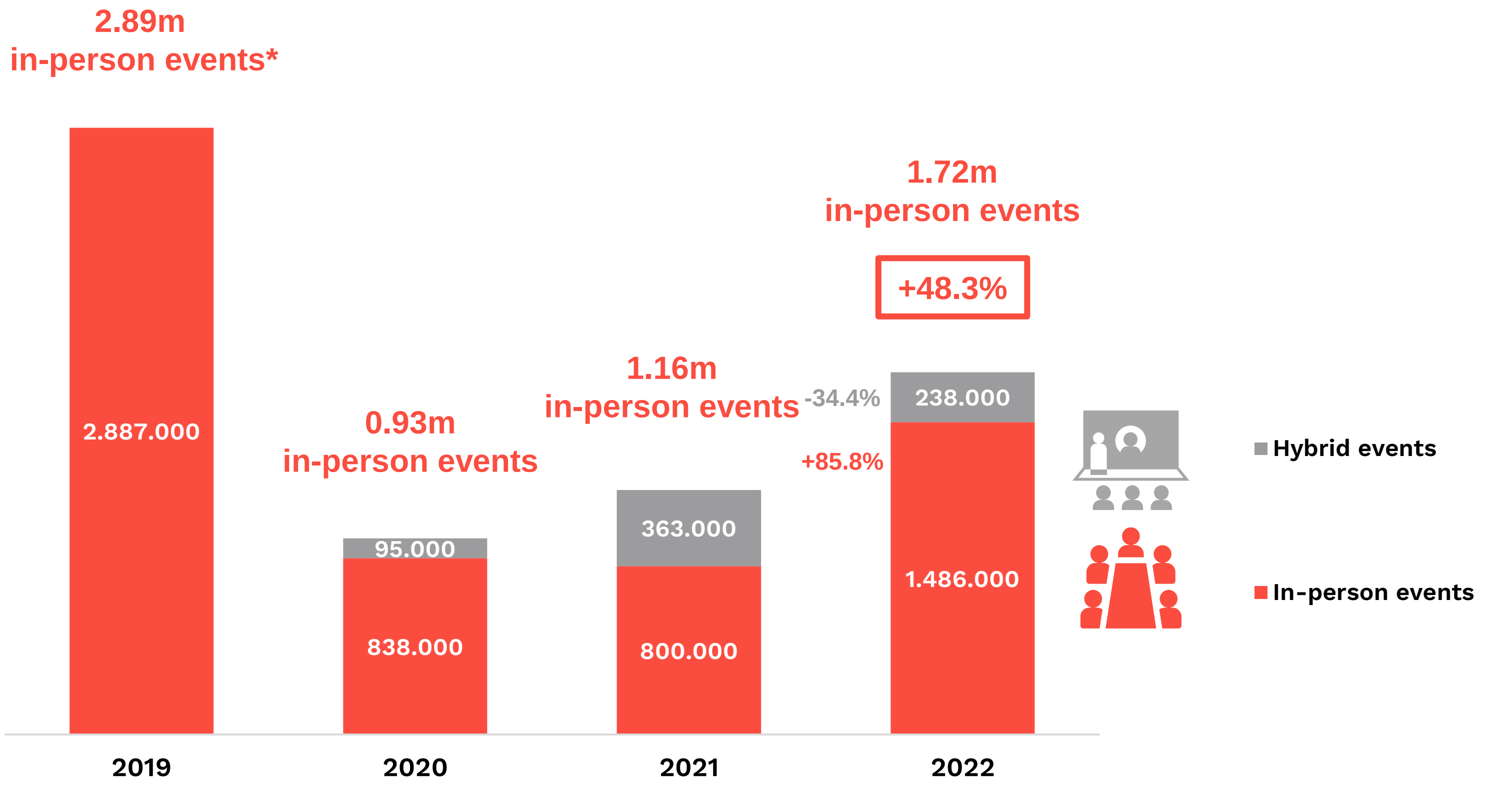
Overall, the volume of in-person events (in-person only and hybrid) last year reached 48.5% of the level of 2019 (before the Covid-19 pandemic).

Please note: Until 2019, the survey only covered in-person events.

Basis: EITW, supplier surveys 2007 to 2023: total number of events, total number of attendees

# Comeback of in-person events

## Development from 2019 to 2022




Basis: EITW, supplier surveys 2020-2023: Total number of in-person events
* Different event types (in-person, hybrid, virtual) were not recorded before 2020.

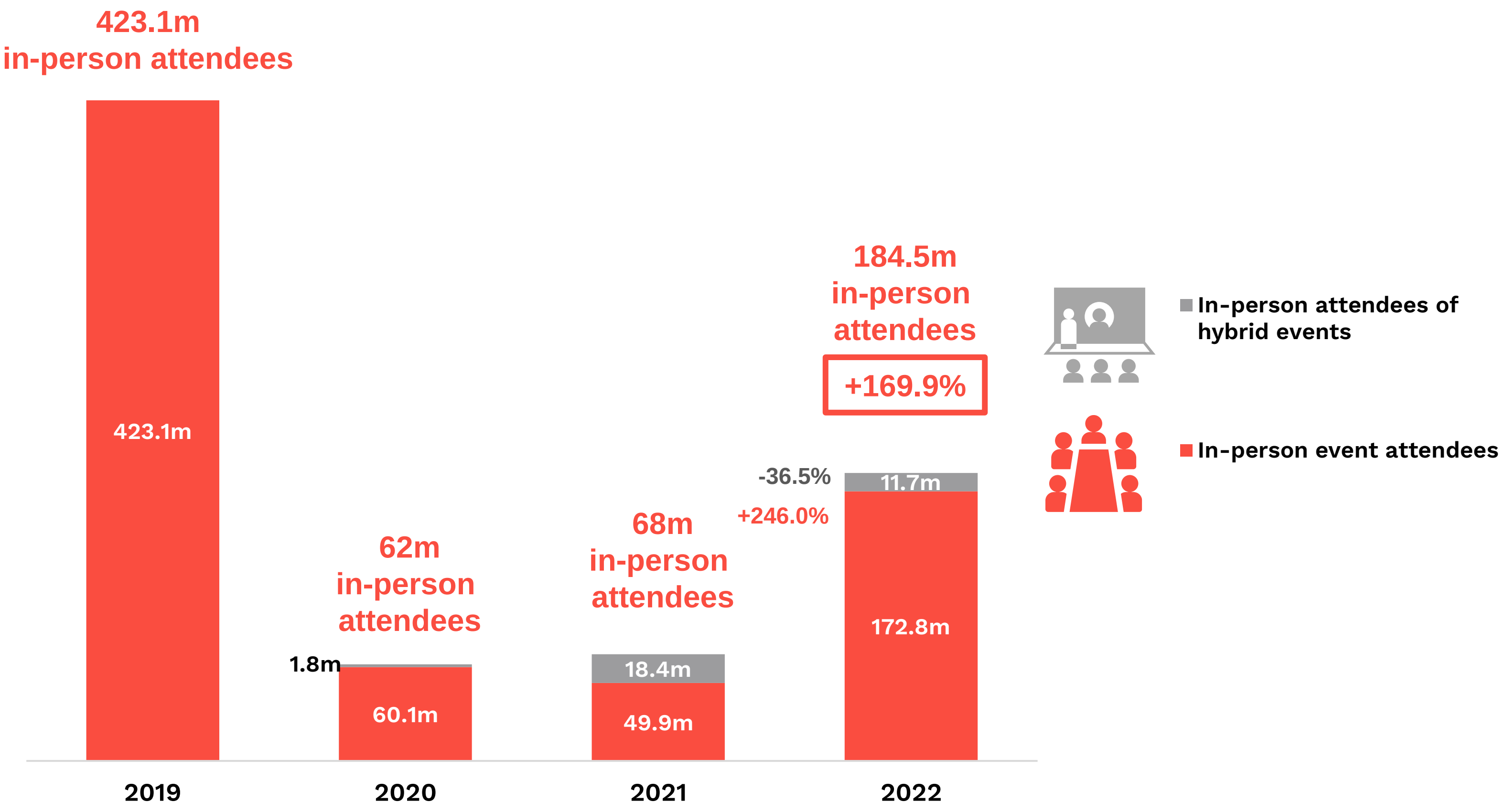
The number of in-person events is based on the information provided by suppliers (event venues). After the lifting of Covid-19 restrictions, the number of in-person events is significantly on the up.

Compared to 2021, in-person events saw a strong increase while hybrid events declined.

With 1.72m, 48.3% more in-person events (in-person events only plus hybrid events) took place in 2022 than in 2021.

# In-person attendees are coming back

## Development from 2019 to 2022




The number of in-person event attendees is based on the information provided by suppliers (event venues). <u>Overall, large events were not banned or regulated any longer after Q1 2022.</u>

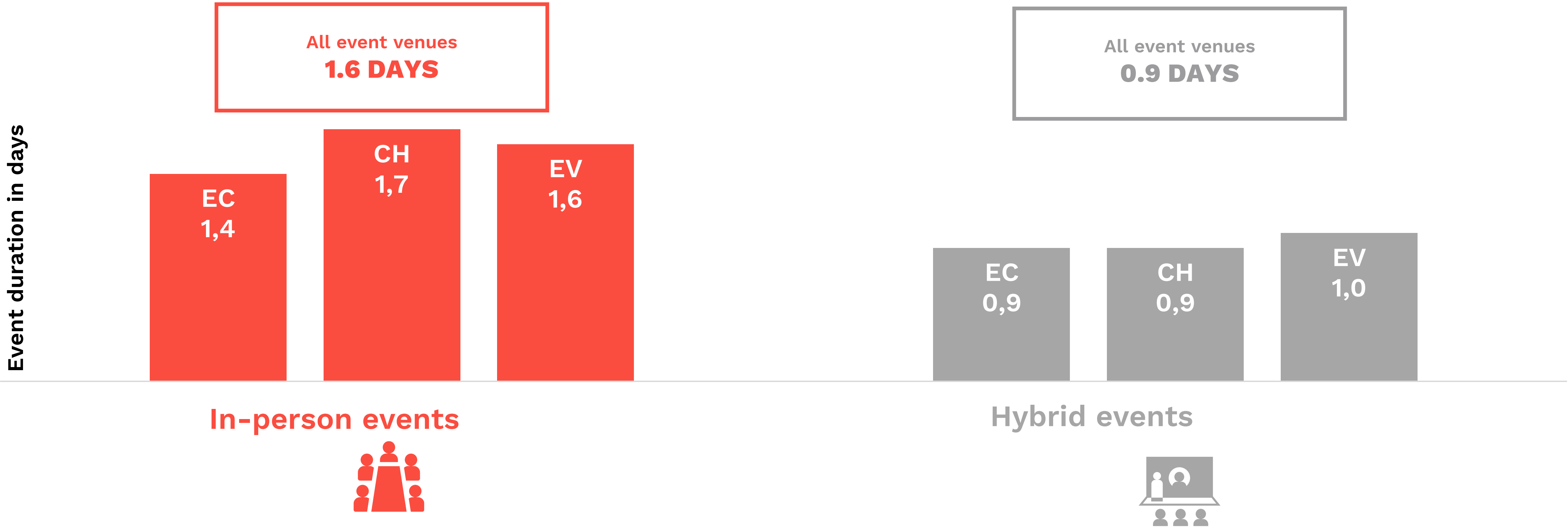
Compared to 2021, the number of in-person event attendees increased considerably, which was, however, somewhat weakened by the decline in in-person attendance of hybrid events. In-person attendees (in-person event attendees plus in-person attendees of hybrid events) increased by 169.9% in 2022 compared to the previous year.

Basis: EITW, supplier surveys 2020-2023: number of in-person attendees
* Different event types (in-person, hybrid, virtual) were not recorded before 2020.

# Longer in-person events in 2022 vs 2021

Germany

## Duration (all suppliers and by type of event venue)

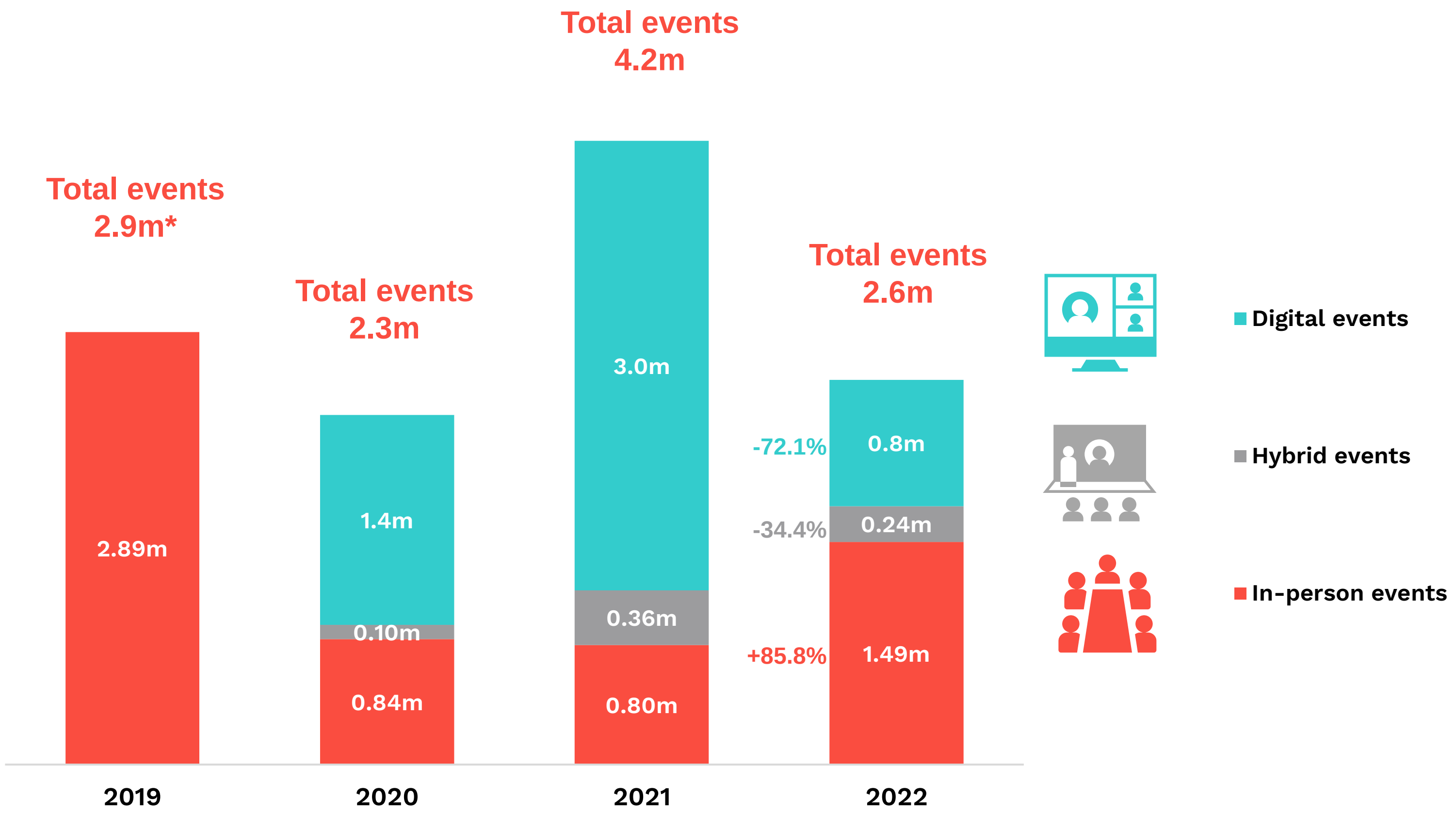



In 2022, in-person events were the longest events, followed by hybrid events. Compared to 2021, the duration of in-person events has increased slightly (2021 = 1.4 days). This can be attributed to longer events taking place in event centres (2021 = 1.2 days) and event venues (2021 = 1.1 days). In conference hotels, in-person events had the longest duration (2021 = 1.7 days).
The duration of hybrid events has not changed (2021 = 0.9 days). Hybrid events taking place in event venues last the longest by a minimal margin.

Basis: EITW, supplier survey 2023: Total number of events in 2022 and their duration
n=264

# In-person/hybrid/digital: new split between event types on the horizon

## Development from 2019 bis 2022




In 2022, the total number of events adds up to 2.6m.

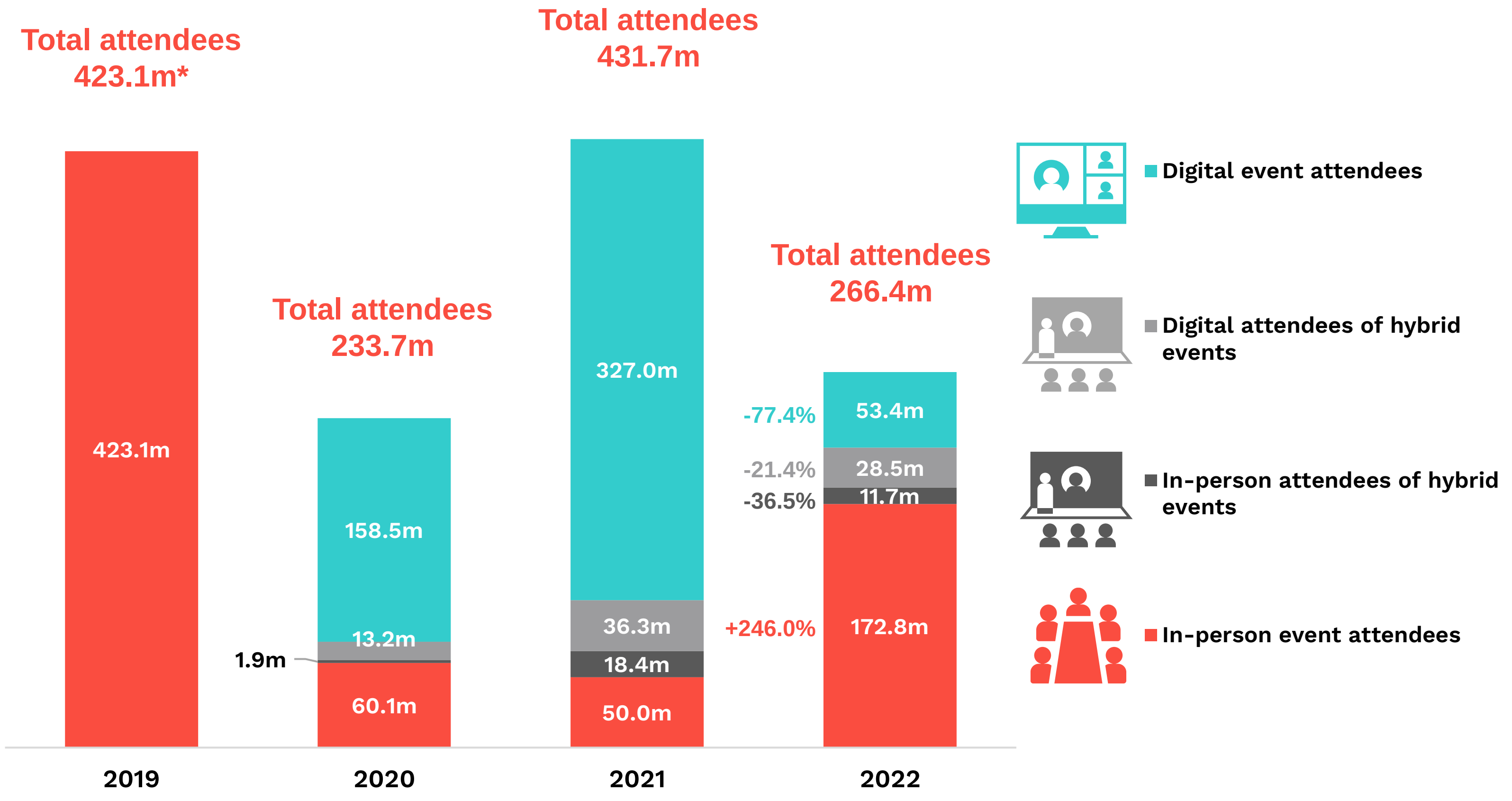
If we look at the total of on-site events (in-person and hybrid), we see a year-on-year increase of 48.3% compared to the previous year (increase of 85.8% for in-person events and decrease of 34.4% for hybrid events). This means that in-person events only without digital attendance options are coming back.

Digital events have decreased considerably compared to last year.

Basis: EITW, supplier & organiser surveys 2020-2023: total number of events.
* Different event types (in-person, hybrid, virtual) were not recorded before 2020.

# Attendees: new split between ways of attending on the horizon

## Development from 2019 to 2022

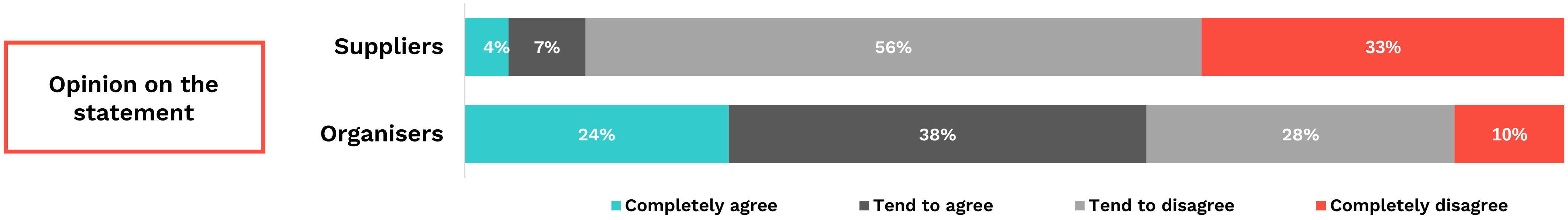



**The total number of event attendees in 2022 is 266.4m, which is significantly lower than the number of attendees in the previous year 2021, due to the slump in digital events.**

Basis: EITW, supplier & organiser surveys 2020-2023: Total number of attendees
* Different event types (in-person, hybrid, virtual) were not recorded before 2020.

# Suppliers and organisers with different view on digital events

**Statement: “Events are increasingly being held digitally again.“**



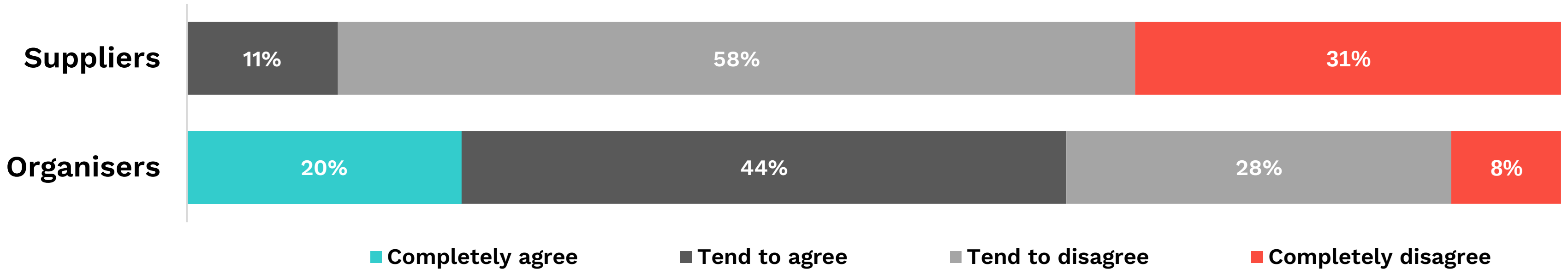

**Organisers and suppliers have different opinions: While digital events are of relevance for organisers (62% choosing “tend to agree“ to “completely agree“), more than 90% of organisers disagree/tend to disagree.**

Basis: EITW, supplier and organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=191, organisers n=597

# Hybrid events more prominent for organisers

**Statement: "Events are predominantly planned as hybrid events."**

Opinion on the statement

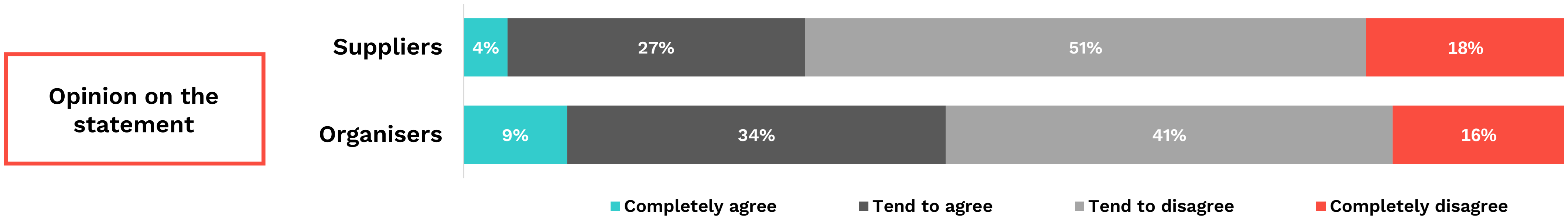



**Almost two thirds of organisers agree/tend to agree with the statement that events are predominantly planned as hybrid events. This is in contrast to suppliers, with almost 90% disagreeing/tending to disagree with the statement.**

Basis: EITW, supplier & organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=191, organisers n=597

# Duration of business events to remain the same in future

## Statement: “Events are getting shorter.“

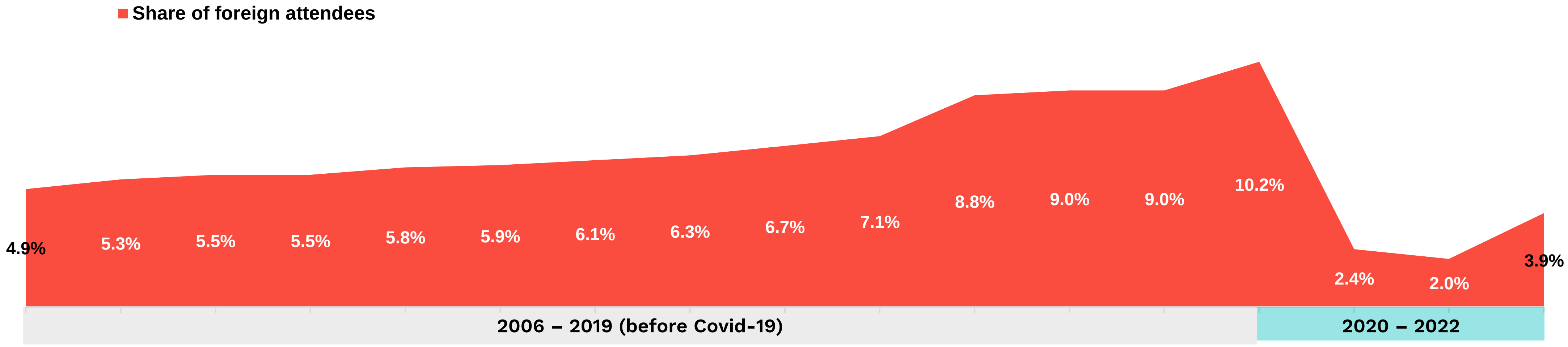



**More than half of the suppliers and organisers do not expect events to become shorter in the future.**

Basis: EITW, supplier & organiser surveys 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=183, organisers n=587

# Proportion of international participants on the rise again

## International attendees at in-person events in Germany




**The proportion of foreign participants averaged 3.9 per cent in 2022 (2021 = 2.0 per cent).**

**The proportion of foreign participants varied depending on the type of venue. In the conference hotels, the proportion was higher than in the event centres (3.5 per cent) and in the event locations (3.1 per cent).**

Basis: EITW, Supplier surveys 2007 to 2023: Total number of attendees, davon aus dem Ausland

# Conference hotels with the largest share of international attendees

## Share of international attendees at in-person events in Germany


**1.9%** international events

EC = Event centres
CH = Conference hotels
EV = Event venues

| | | |
|---|---|---|
| **EC 3.5%** international attendees | **CH 5.1%** international attendees | **EV 3.1%** international attendees |
| **1.7%** international events | **2.3%** international events | **1.7%** international events |

The share of attendees from abroad averaged 3.9% in 2022 (2021 = 2.0%).

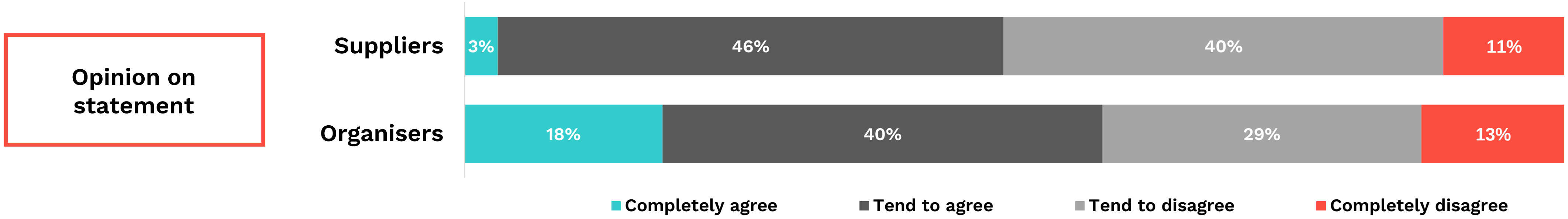
The proportion of international attendees varied depending on the type of venue. At 5.1%, it was slightly higher in conference hotels than in event centres (3.5%) and in event venues, with a share of 3.1%.

The share of international events (= at least 10% international attendees) was 1.9% in 2022 (2021 = 1.0%). Most international events were held in conference hotels (2.3 %), followed by event centres and event venues (both 1.7%).

Basis: EITW, supplier survey 2023: Share of international in-person attendees in % for all events (estimation, if necessary). Suppliers n=164: Please indicate the number of international events (absolute number) Suppliers n=218

# Organisers except fewer international attendees

**Statement: "The number of international attendees is declining."**



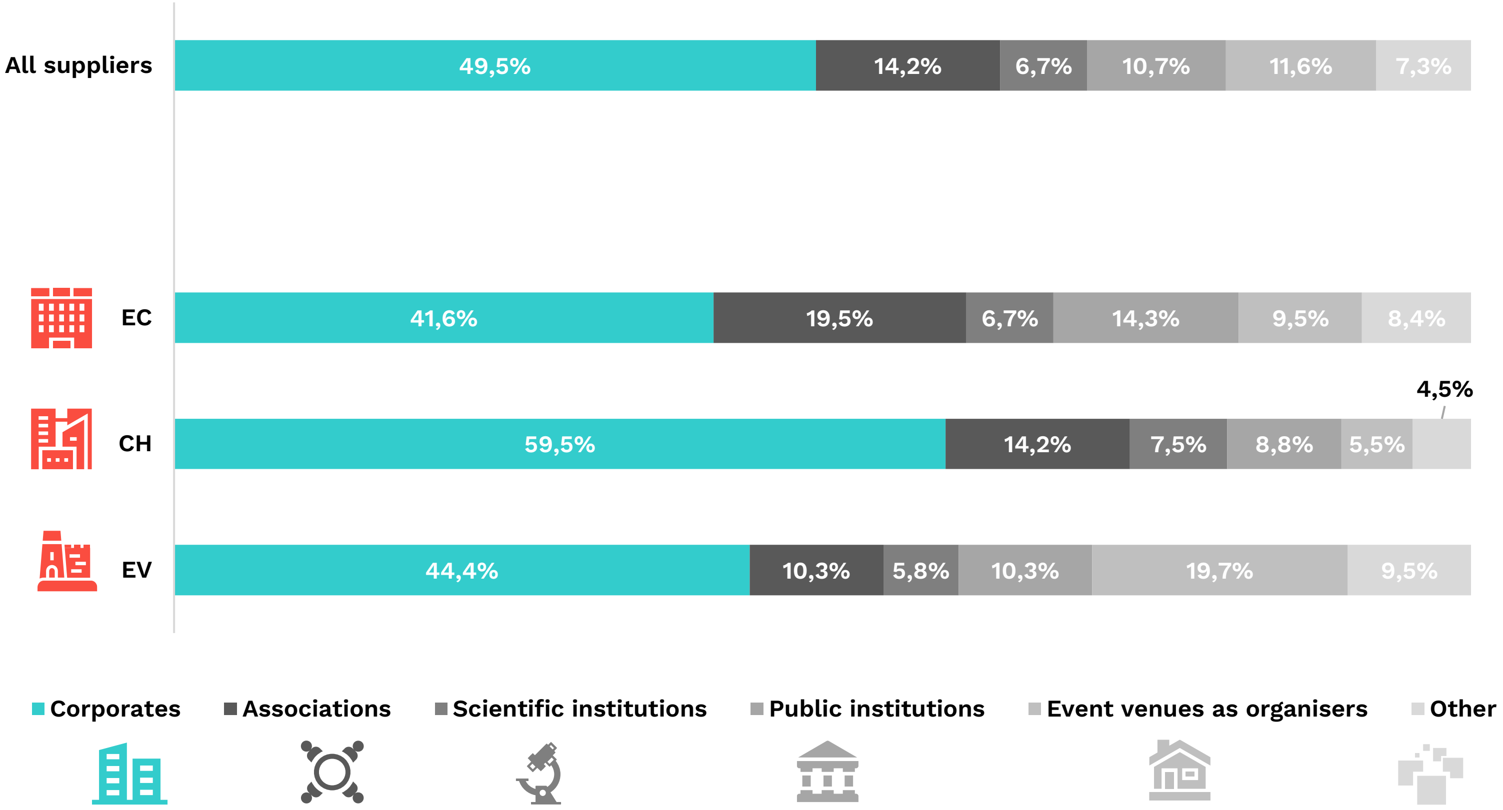

**Organisers tend to assume that the number of international attendees will decrease (58%). Suppliers are divided in their opinion.**

Note: The statements refer to the future development of business events. The statements of the respondents are not applicable to the share of foreign participants determined for 2022, as the overall market was still in recovery.

**Basis: EITW, supplier & organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?**
**Suppliers n=150, organisers n=582**

# Corporates most important client segment




**Corporates were the proportionally largest group of organisers in 2022. Associations followed at a clear distance as the second most important client group.**

**Compared to the previous year, the share of companies had gone up (+ 8 percentage points), while the shares of all other types of organisers, with the exception of scientific institutions, have declined slightly.**

**The "return" of corporate clients was most noticeable in event centres (+12.4 percentage points).**

Basis: EITW, supplier survey 2023 Please indicate (percentage) the types of organisers that organise the events taking place in your venue
Suppliers n=212

# 03 Supply-side Trends

# Venues in Germany

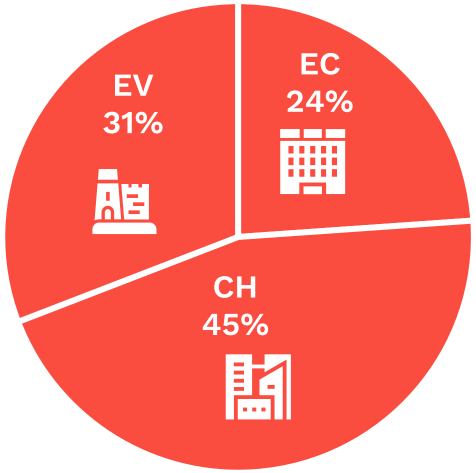
## Breakdown of venues by type

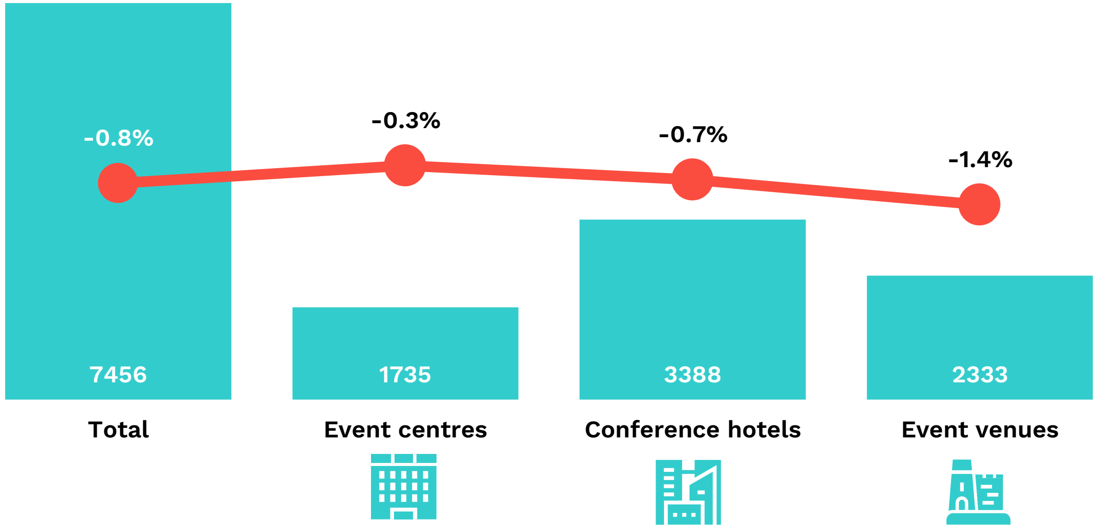
In 2022, the number of suppliers of meeting and event venues fell by 0.8%. Decline was strongest in the event venue category at 1.4%.

The percentage share of the different types of event venue changes only minimally, with conference hotels making up the largest share, followed by event venues. Around a quarter of the venues are event centres

Overall, supply continues to decline slightly.

***Please note: Details on the reasons, e.g. insolvencies or repurposing of buildings, for the described developments, cannot be provided.***

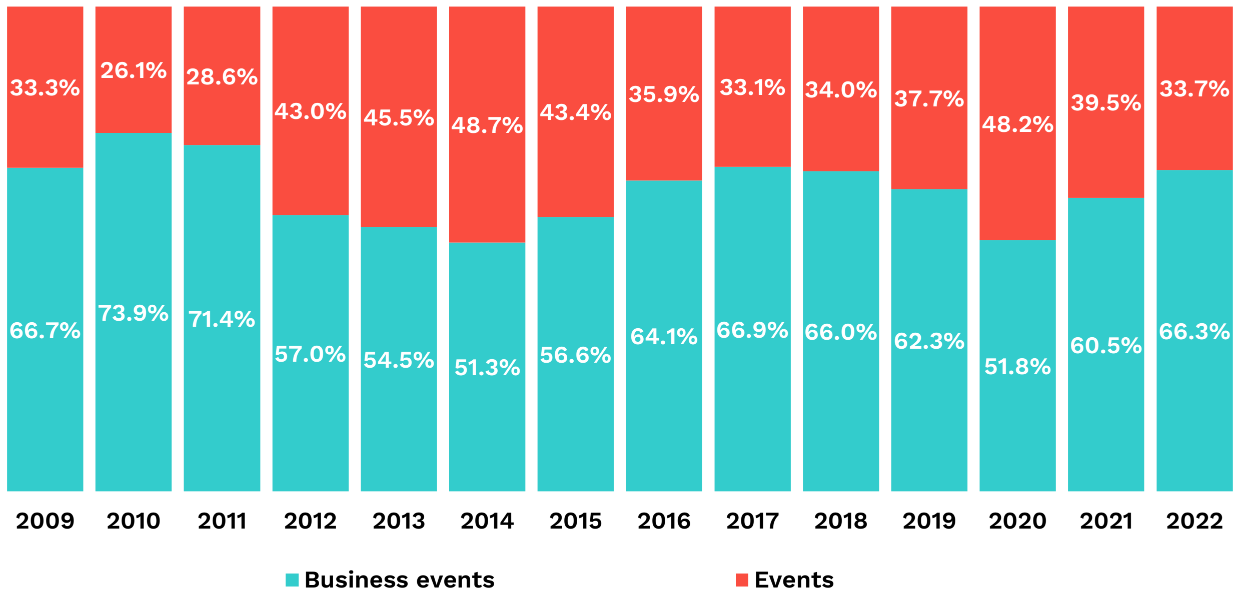



Basis: EITW, own surveys 2023

# Business events prevail

## Breakdown of business events und other events




**Business events include congresses, meetings and seminars as well as exhibitions and presentations. The remaining event types are grouped under the term events. With this simplified classification, the division between business events and those with a leisure character can be clearly presented across the market overall.**

**Compared to 2021, the share of business events increased in 2022 and accounted for two thirds of all events.**

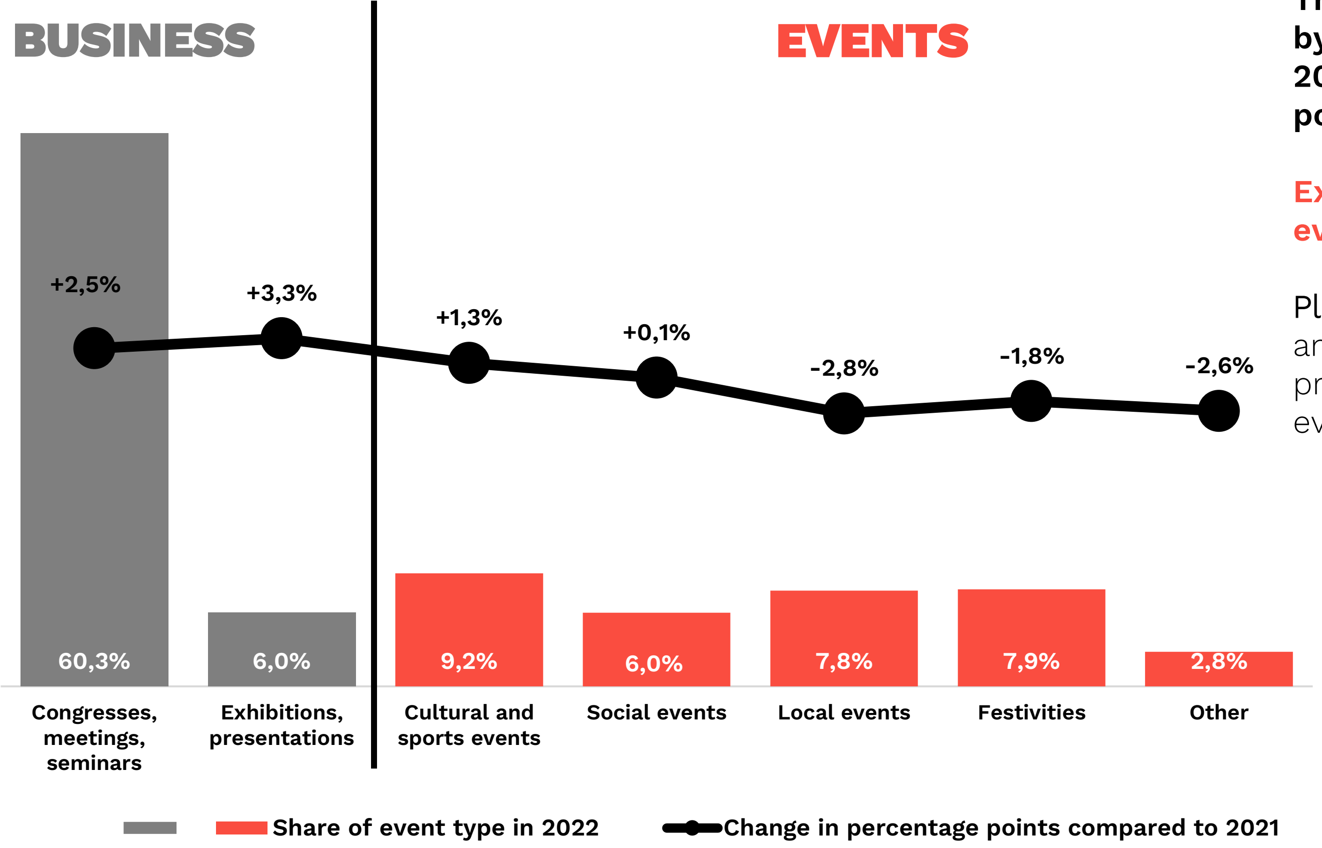
**With 79%, business events dominated above all in conference hotels. In event centres, there was a slightly higher focus on events (business events accounted for 47.3%). In event venues, business events dominated (55.3%).**

**Please note:** The Meeting & EventBarometer survey does not cover the entire conference market as venues are only surveyed if they have a capacity of at least 100 seats (row seating) in their largest space.

Basis: EITW, supplier sureys 2010-2023: What is the split of events in your venue? (please provide figures by event type)
Suppliers n=238

# Congresses, meetings and seminars most important event type

## Breakdown by event type in %




**The category of congresses, meetings and seminars was, by far, the most important event type in German venues in 2022. Compared to 2021, it accounted for 2.5 percentage points more.**

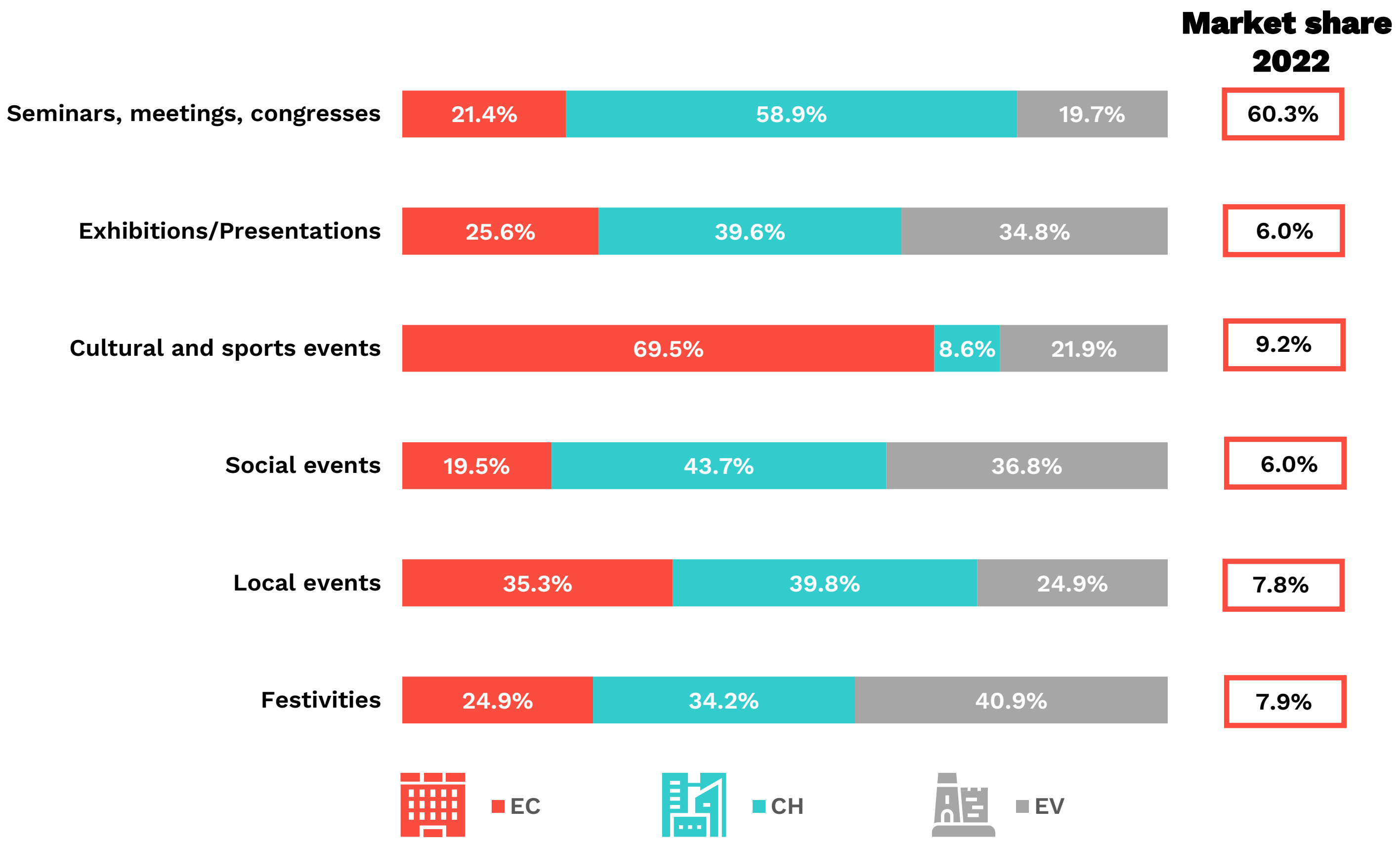
**Exhibitions and presentations as well as cultural and sports events also accounted for higher shares in 2022.**

Please note: This graph only shows the distribution of events among the different types and their changes compared to the previous year, but says nothing about the volume and size of the events.

**Basis: EITW, supplier surveys 2022 + 2023: What is the split of in-person and hybrid events with regard to event types?**
**Suppliers n=238**

# Event types in the different types of venues

## Distribution of event types in %



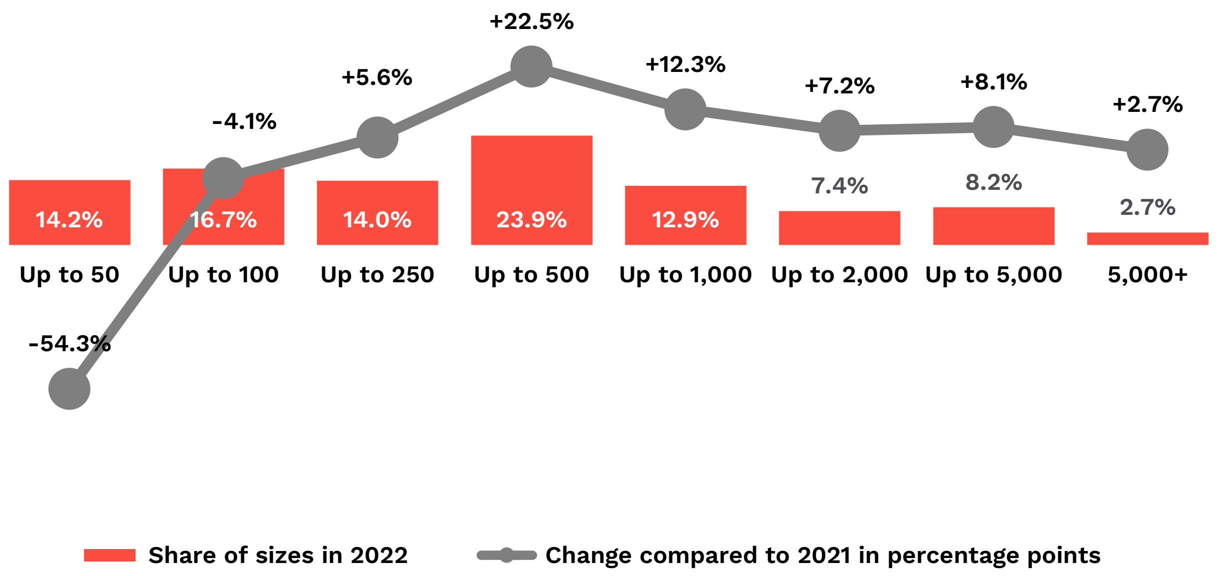

Looking at the different event types regardless of their market share and according to the distribution among the different types of venues reveals the profiles of the respective conference venues.

Event centres stood out for cultural and sports events. Conference hotels, on the other hand, feature prominently for seminars, meetings and congresses. A large share of festivities and social events took place in event venues.

Basis: EITW, supplier survey 2023: own graph – distribution of the different event types across venues
Suppliers n=238

# Share of small events declining considerably

## Size of seminar, meetings and congresses




**Regarding the sizes of congresses, meetings and seminars, 2022 saw a marked shift to larger events in 2022 compared to 2021. Small events with up to 50 attendees accounted for only 14.2% (-54.3 percentage points).**

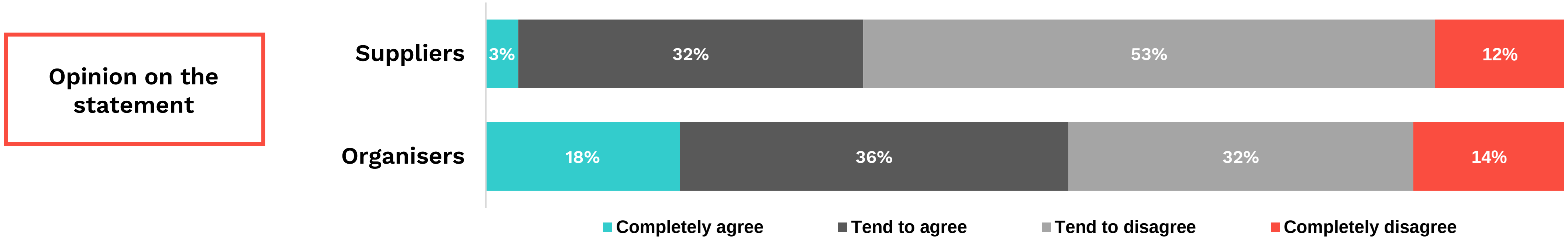
**The lifting of capacity restrictions for events in 2022, which made it again possible to hold large events, explains the increase in the share of larger events. Meeting and congresses for 251 to 500 attendees feature particularly prominently.**

Please note: This graph only shows the percentage distribution of events among the different size categories and the changes in percentage points compared to the previous year. It needs to be considered independently from the total volume of events in the years 2021 and 2022.

**Basis: EITW, supplier surveys 2022 & 2023: Please indicate the split between the sizes of in-person events in the category seminars, meetings and congresses in your venue and, if possible, indicate the share of international guests.**
**Suppliers n=101**

# Number of individual business event attendees stable

## Statement: “Events are getting smaller, with fewer attendees."




**Venue providers do not expect business events to become smaller and have fewer attendees.**

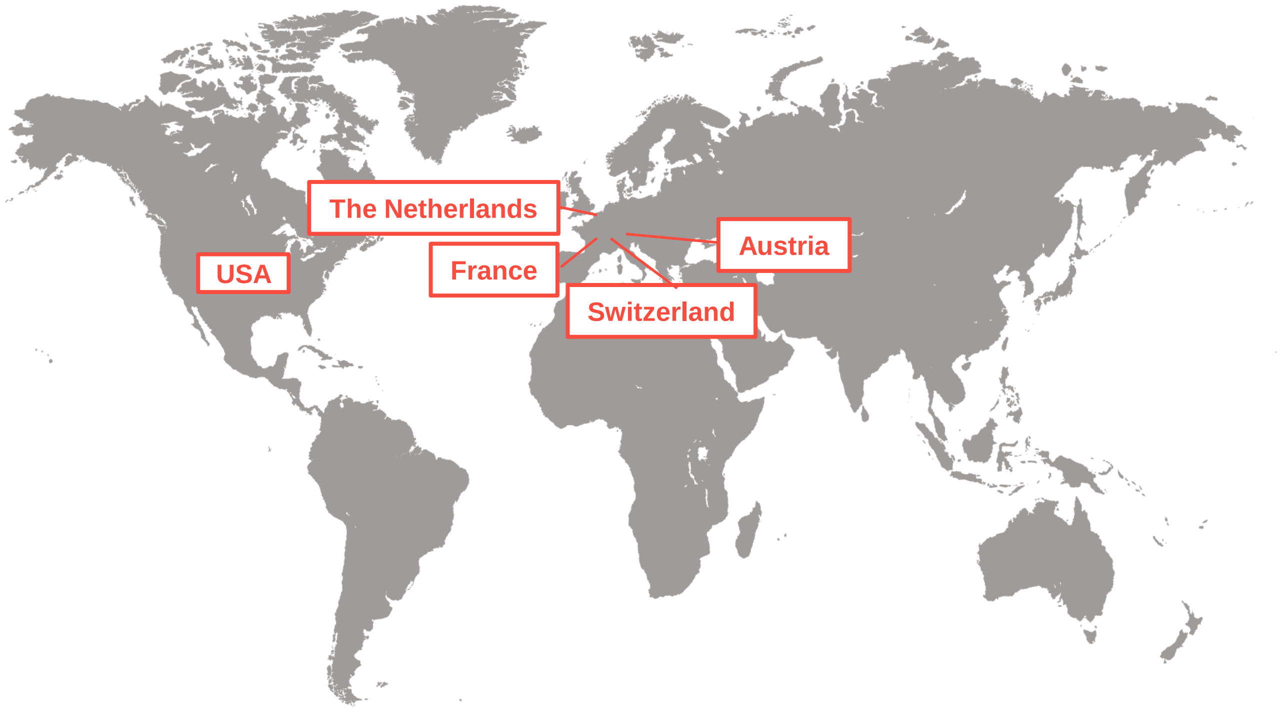
Basis: EITW, supplier & organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=190, organisers n=584

# 04

# Origin of Organisers

# Adjacent countries and USA among the most important source markets

## International source markets for venue providers



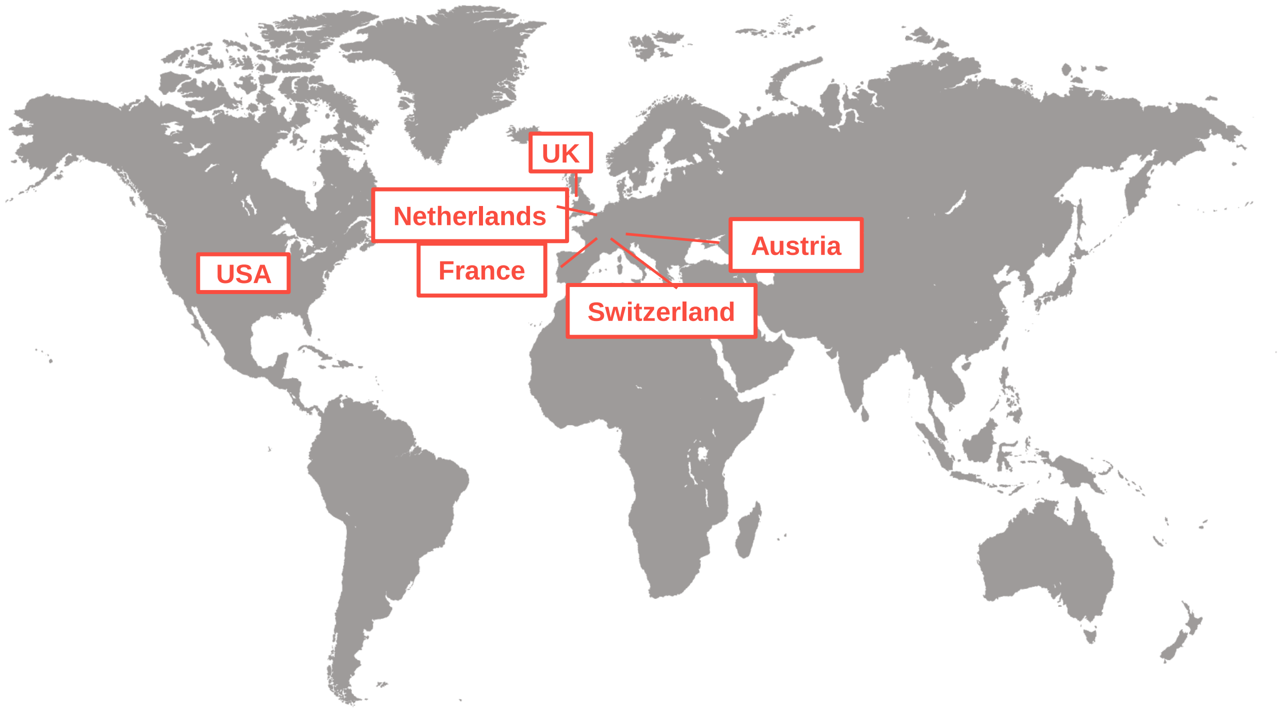

Germany's direct neighbours Austria and Switzerland once again came first and second in the ranking of the most important international source markets in 2022, followed by the USA.

Other neighbouring countries such as the Netherlands and France were also among the five source markets.

Basis: EITW, supplier surveys 2019-2023: Which international source markets are the most important ones for your event venue? Suppliers n=80

# Focus remains on European source markets

## Potential future source markets for venue providers




**For future marketing activities in international source markets, it is important to identify potential new markets.**

**The ranking of potential source markets lists the countries from which event enquiries were received, regardless of whether the events actually took place in the end.**

**The top three potential source markets were Switzerland, UK and Austria.**

Basis: EITW, supplier survey 2022: From which international source markets do you receive enquiries for future events? This also includes enquiries that are not yet confirmed or have not been confirmed.
Suppliers n=85

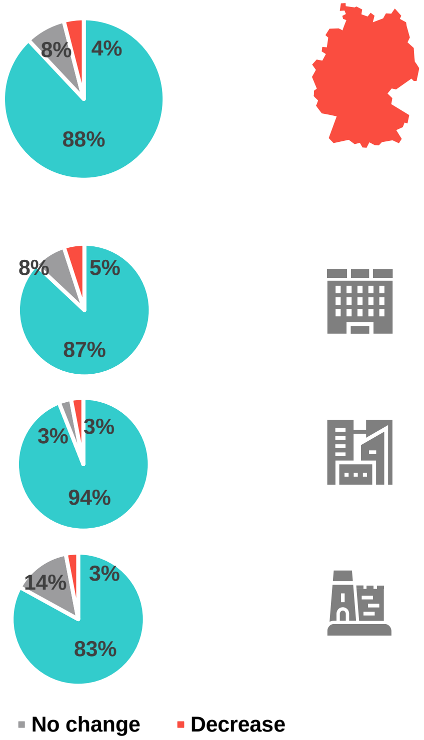
05

# Turnover & Budgets

# Suppliers: Changes in turnover in 2022 compared to 2021

## Changes in turnover in 2022 compared to 2021

(Breakdown of estimates)




## Changes in turnover in 2022 compared to 2021 in % (average)

+76.7%

+72.5%

+66.9%

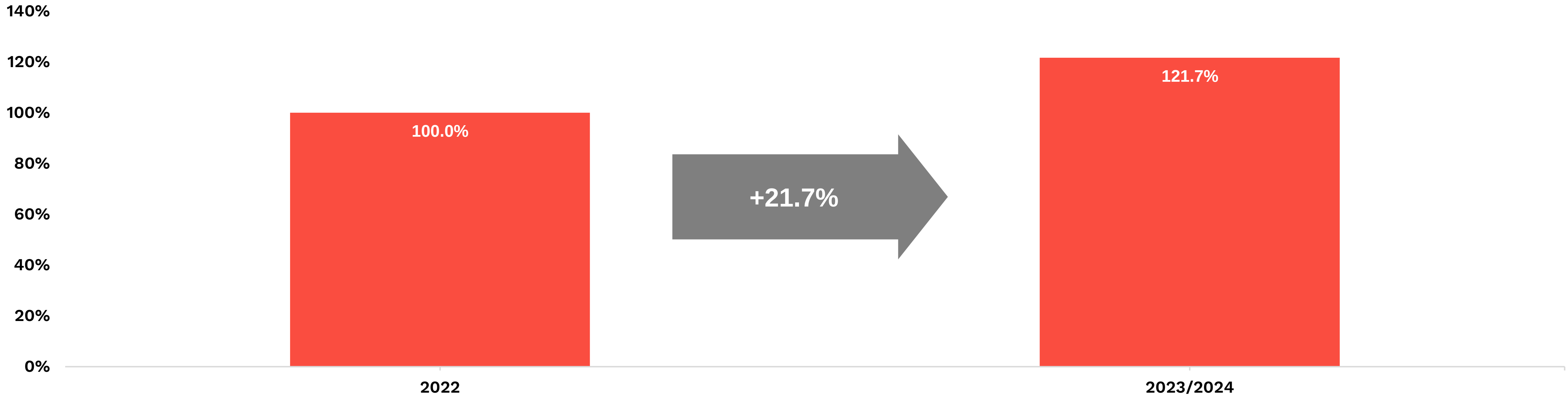
+93.0%

A comparison with the pandemic year 2021 shows that turnover in 2022 increased by 76.7% overall. An upward trend is clearly noticeable. Increasing turnover was true for the vast majority of suppliers (88%). For a few businesses turnover remained at the same level or decreased even further.

Looking at individual types of venues, mainly conference hotels posted increasing turnovers in 2022 (94% indicated an increase). However, in terms of the percentage increase in turnover, conference hotels were behind event centres and event venues. The latter saw the strongest change with an average increase of around 93%, although only 83% of event venues posted an increase in turnover.

Basis: EITW, supplier survey 2023: To what extent did the turnover generated with events change in 2022 compared to 2021? Please select the type of change in the drop-down menu and enter the value in % in the column next to it (if turnover remained the same, please enter 0).
Suppliers n=252

# Suppliers expect turnover to grow by more than 20%



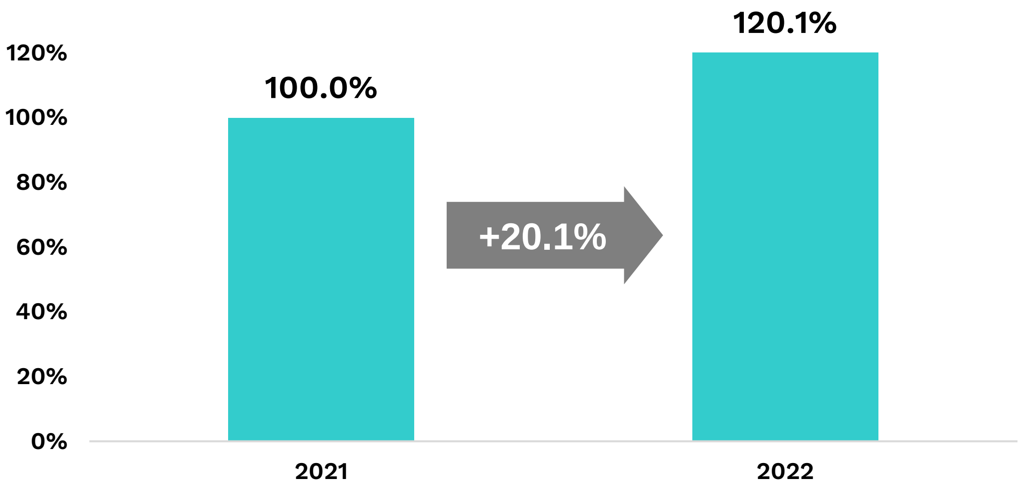

**This diagram shows the estimate of future turnover developments for 2023 and 2024 based on 2022 turnover.**
**Providers of all venue types expect positive turnover developments for the next two years, with growth of more than 20%.**

Basis: EITW, supplier survey 2023: What is your estimate for developments within the next two years? Please indicate by what percentage turnover will be changing compared to 2022.
Suppliers n=169

# Organiser budgets have increased and are rising by around 20%

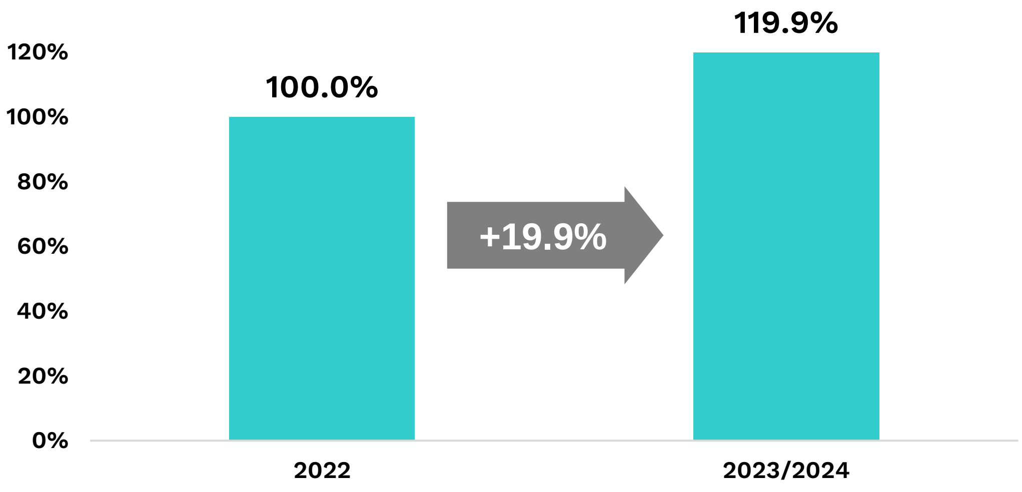
## Budget trends

### Status quo




In 2022, event organiser budgets were 20.1% higher than in 2021. The budget remained the same in 2022 for almost half of the respondents and increased for only 44%.

### Outlook



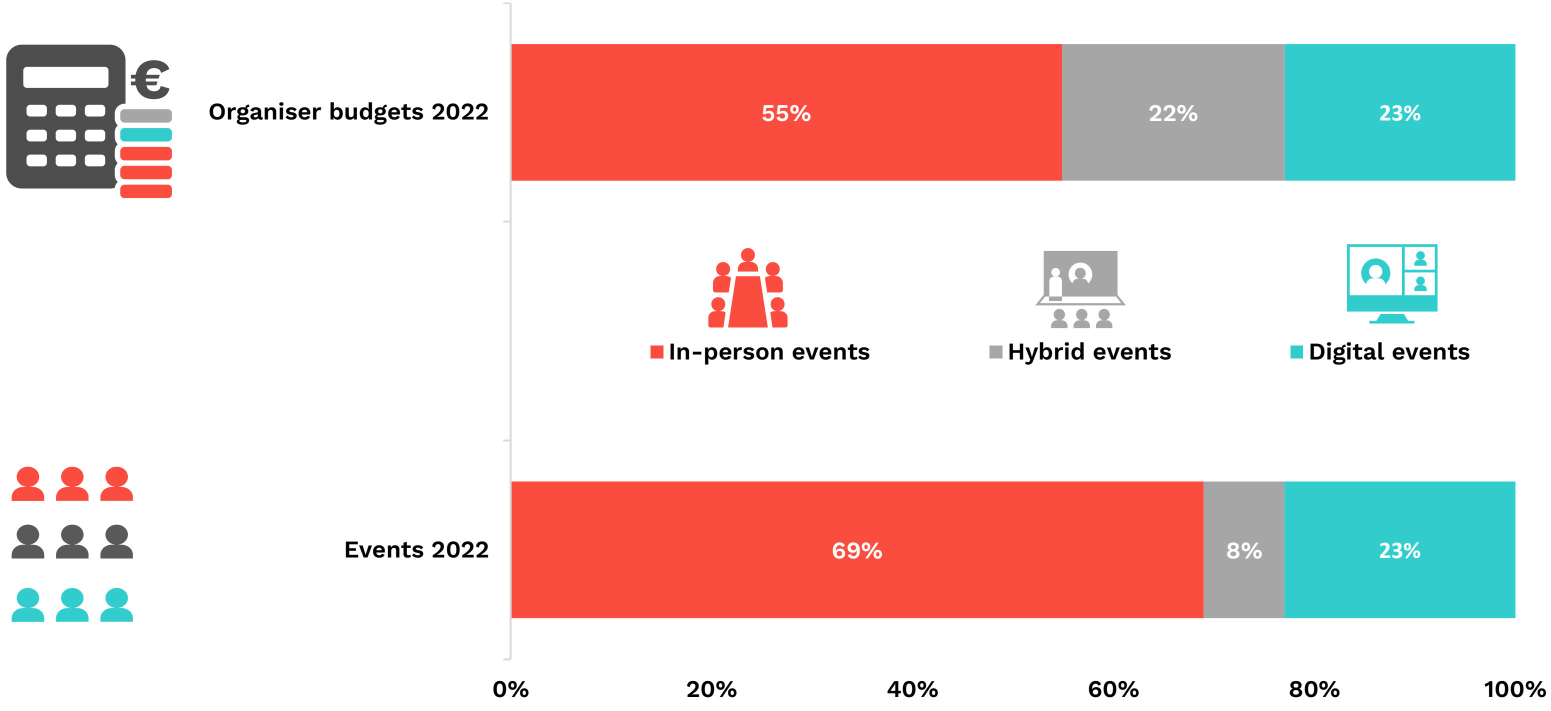

For the current year 2023 and the coming year, budget increases of around 20% are expected. For 2024, the share of those who expect the budget to increase is growing.

Basis: EITW, organiser survey 2023: How would you rate the development of your event budget compared to 2022? Please select the type of change in the drop-down menu and enter the value in % in the column next to it.
Organisers n=599

# More than half of the budget was allocated to in-person events

## Which event types account for the largest budget share?




In-person events took up just over half of organiser budgets in 2022, but accounted for over two-thirds of events.

Basis: EITW, organiser survey 2023: What was the composition of your event budget in relation to the different types of events in 2022? Sum = 100%. How many events (with at least 20 attendees) did you organise in 2022?
Organisers n=515

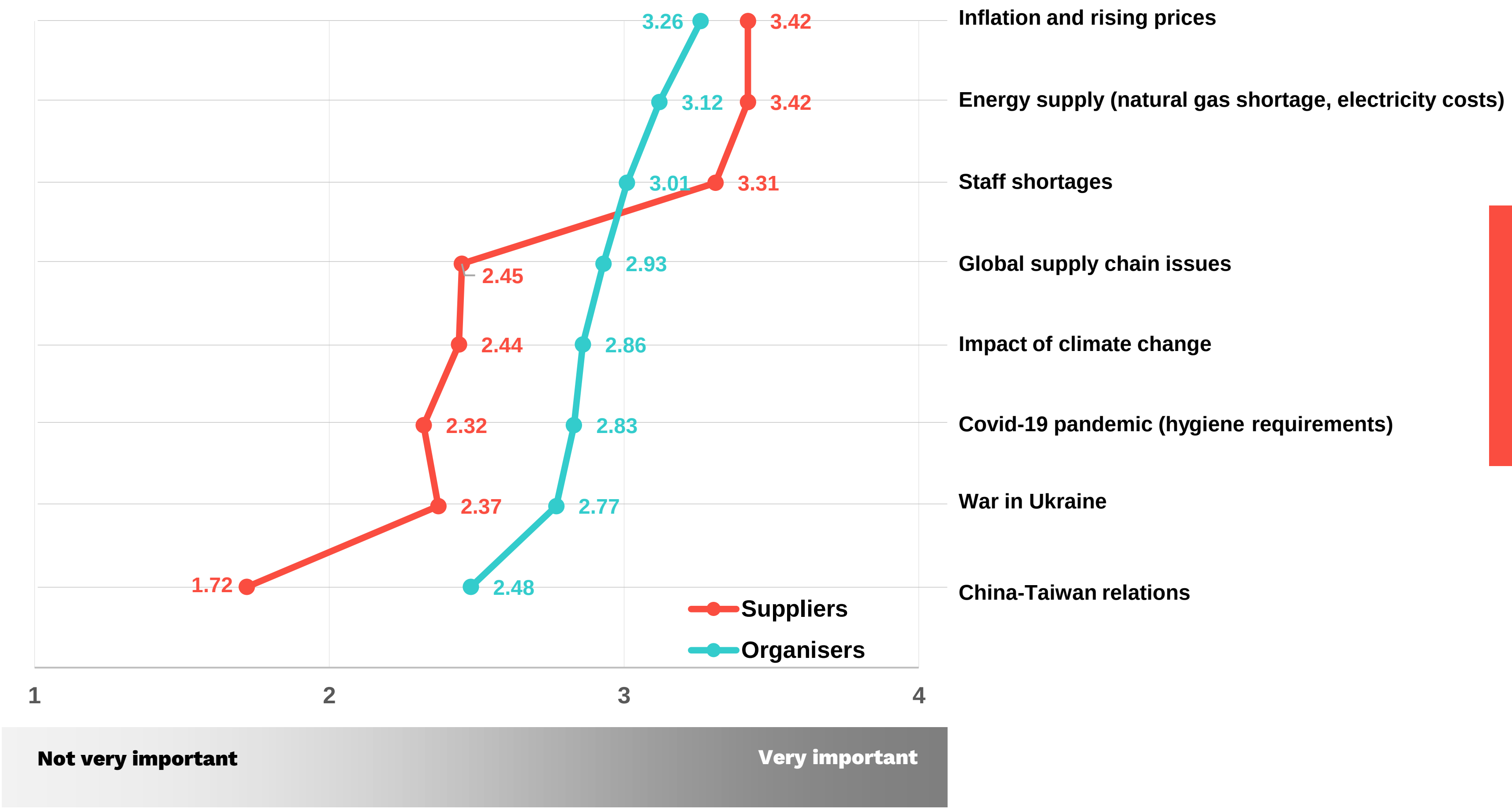
# 06 Focus Topics

*Focus topics*

# Inflation, energy and staff shortages are the biggest challenges

**Challenges are visualised with mean values**

**Respondents were asked to indicate the importance of different challenges in relation to their own businesses**




**Suppliers are more affected by inflation, energy issues and staff shortages than organisers.**

Basis: EITW, supplier and organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=213, organisers n=602

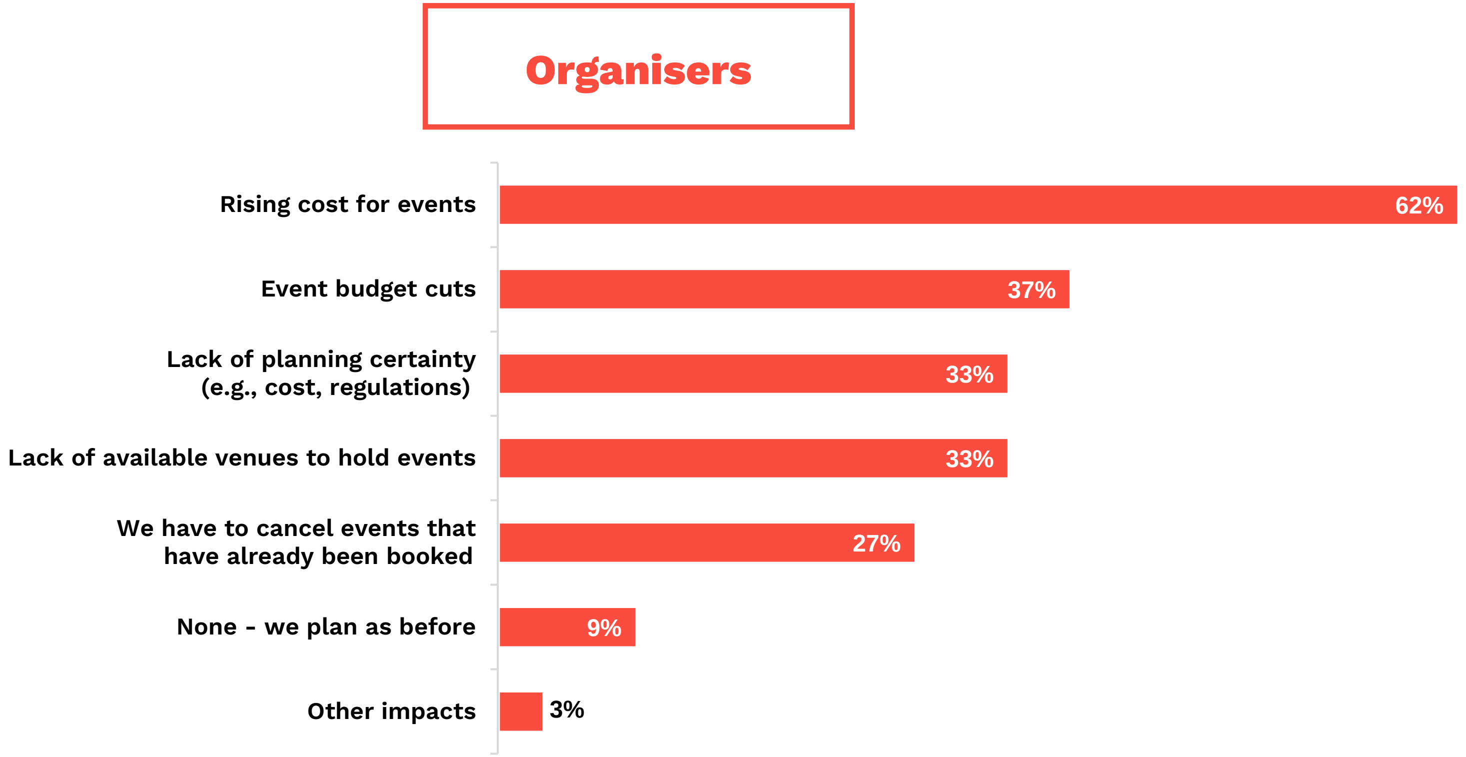
*Focus topics*

# How are suppliers impacted by the challenges?


Event venue providers are most affected by changes in the management of their buildings and price pressure from organisers. However, the lack of planning certainty and investments in energy-saving applicances are also important.

Basis: EITW, supplier surveys 2022 & 2023: Which of the following aspects impact your venue and current business? Please select the applicable answers, multiple answers possible.
Suppliers October 2022 n=77, suppliers MEBa 22/23 n=213

# How are organisers impacted by the challenges?




**Event planning is mainly affected by rising cost and budget cuts.**

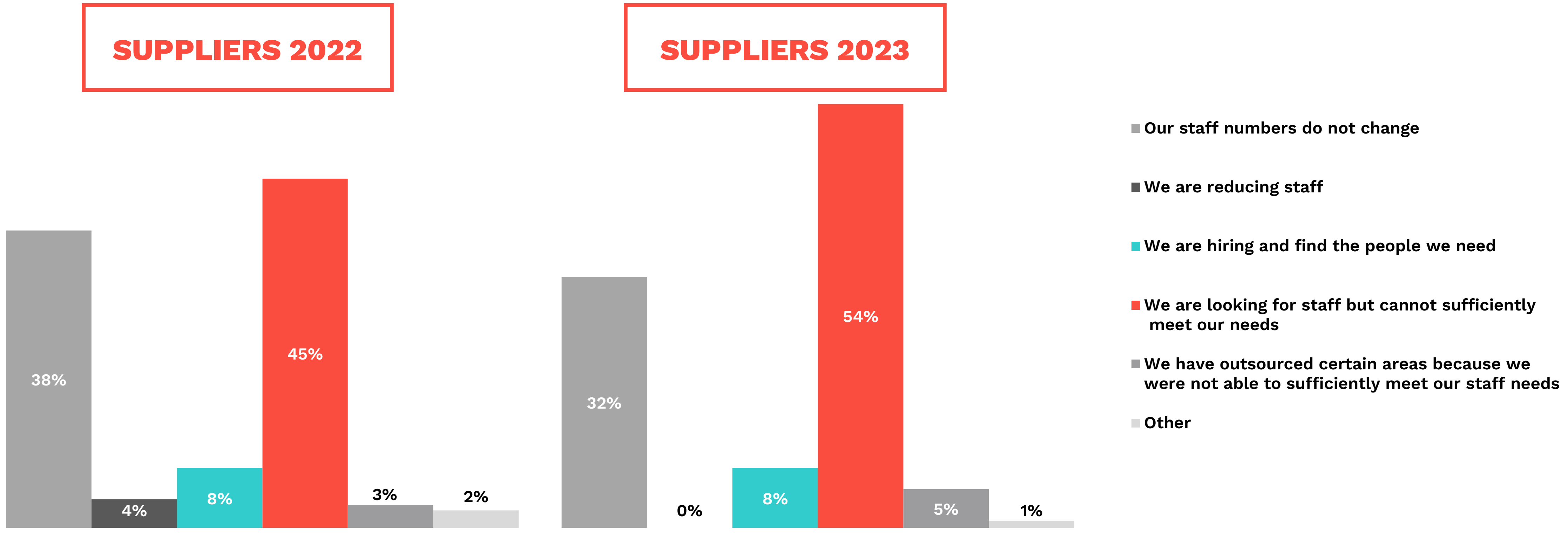
Organiser surveys 2022 & 2023: Which of the following aspects impact on your event planning? Please select the applicable answers, multiple answers possible.

07

# Focus topic: Staff

*Focus topic: staff*

# Staff shortages remain a challenge



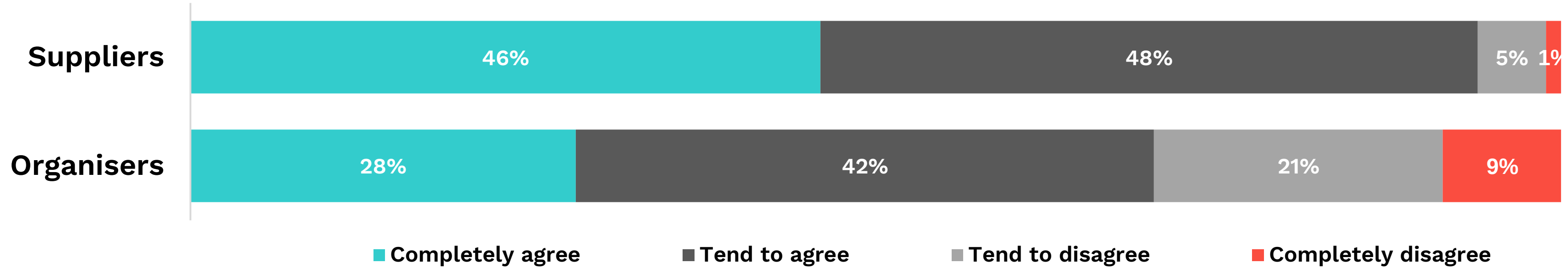

**The majority of suppliers is looking for staff. 62% of venues would like to recruit staff (up from 53% in 2022) but only 8% of them find sufficient staff and 54% cannot sufficiently meet their needs.**

Basis: EITW, Supplier surveys 2022 & 2023: How do you assess your situation regarding staff? Organisers 2021/2022 n=259, organisers 2022/2023 n=214

# Crises make recruitment more difficult

**Statement: “Recruitment is made even more difficult by the crises."**

Opinion on the statement




**94% of suppliers confirm that recruitment is made even more difficult by various crises. Organisers are less affected.**

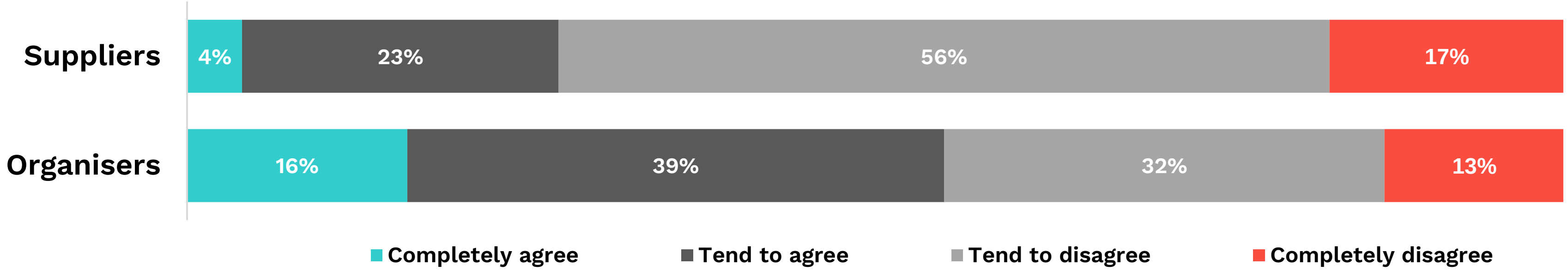
Basis: EITW, supplier and organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=184, organisers n=584

*Focus topic: staff*

# Suppliers: majority of staff is tech-savvy

## Statement: “Staff cannot keep up with tech development anymore."

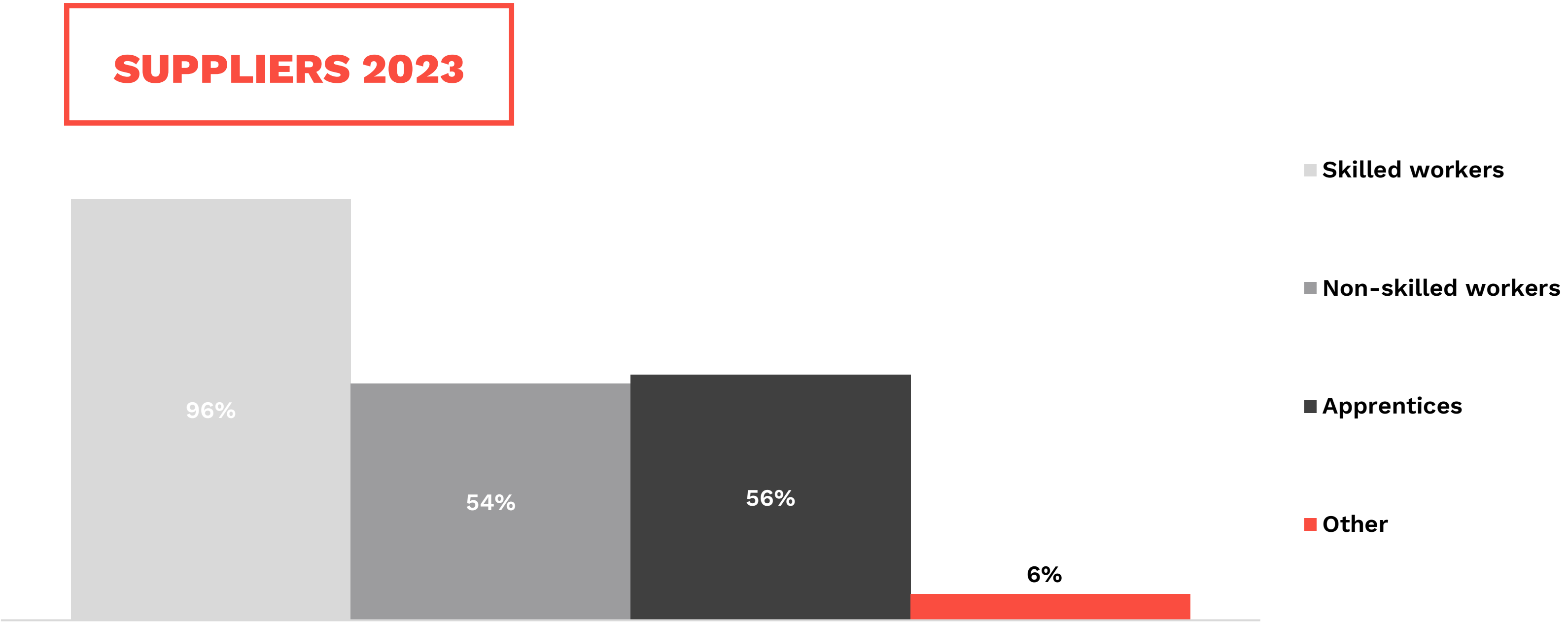
Opinion on statement




**Almost three quarters of suppliers think that their staff is tech-savvy. Among organisers, opinion is divided. Slightly more than half have the feeling that they are not keeping up anymore with tech developments.**

Basis: EITW, supplier and organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=169, organisers n=568

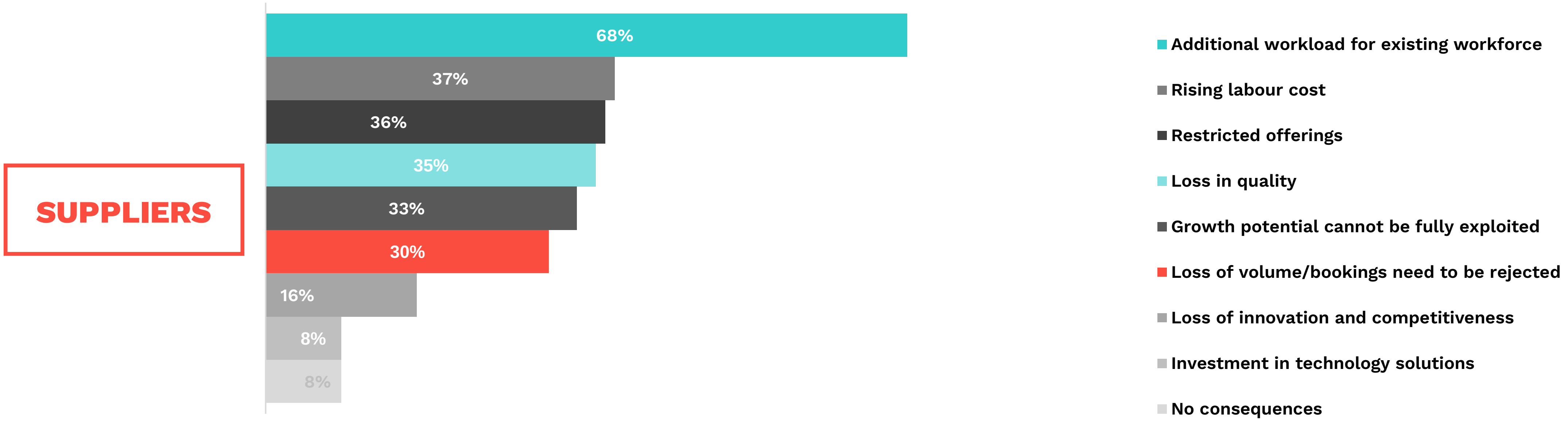
# Venues mainly need skilled workers




**Of the suppliers currently recruiting (cf. 62% from p. 46), by far the most of them are looking for skilled workers, followed by apprentices and non-skilled workers.**

Basis: EITW, supplier survey 2023: What kind of staff are you looking for? (multiple answers possible)
Suppliers n=124

# Existing workforce absorbs additional workload



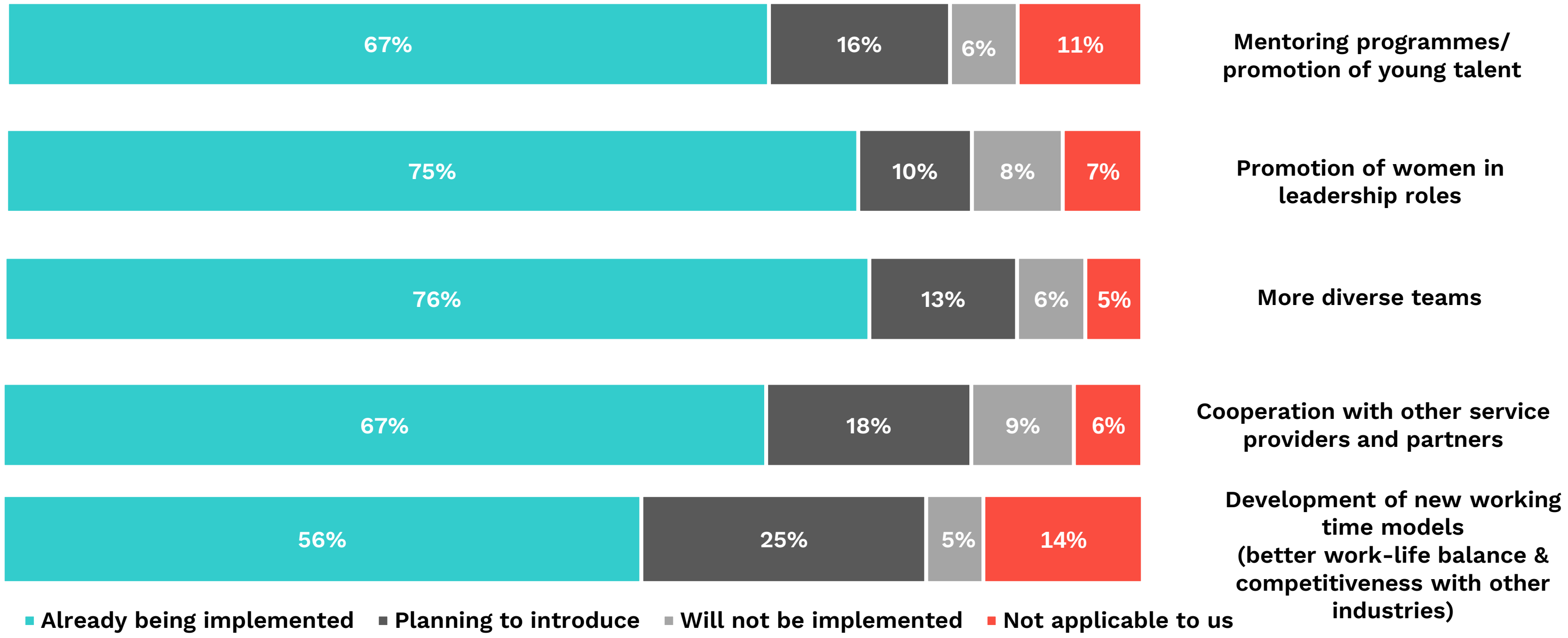

**For suppliers, the additional workload for the existing workforce is the key consequence of the shortage of skilled workers/staff.**

**This is followed by rising labour costs, restrictions of offerings, loss of quality and the fact that the growth potential cannot be exploited.**

Basis: EITW, suppier survey 2023: What consequences does the ongoing shortage of skilled workers/staff already have for your company? (muliple answers possible)
Suppliers n=214

# What is done to solve the issue of staff shortages?

## SUPPLIERS



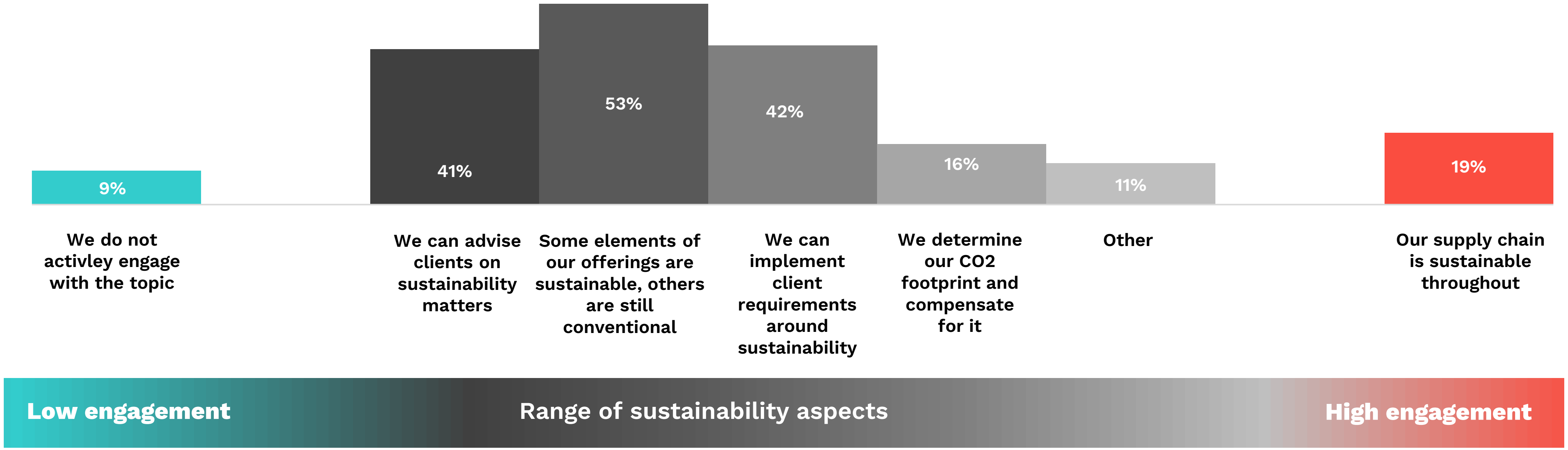

**Current approaches to solve the problem are promoting women, diversity and young talent.**

Basis: EITW, supplier survey 2023: What is your company doing to solve the shortage of skilled workers in the long term? (multiple answers possible)
Suppliers n=214

# 08

# Focus topic: Sustainability

# Suppliers working on sustainability measures

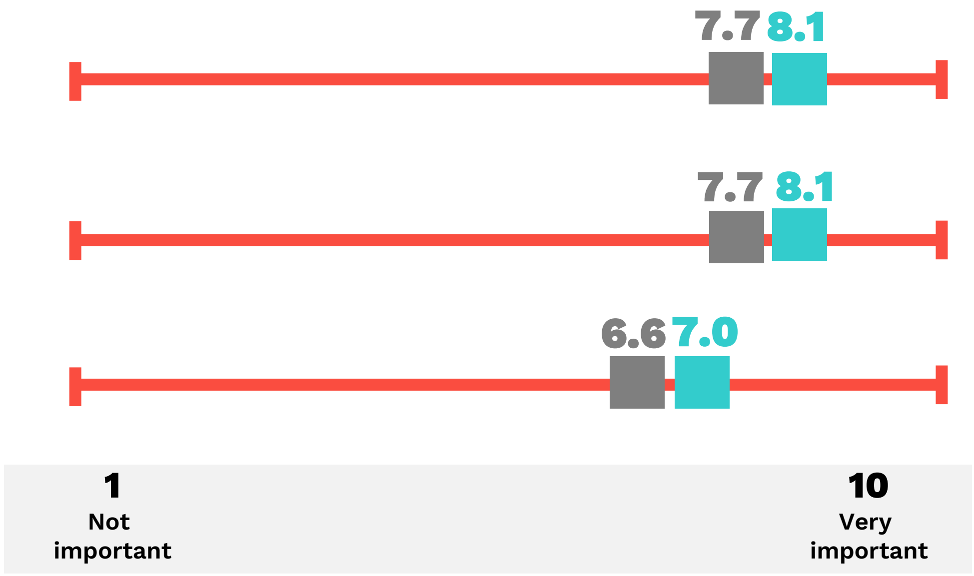



**Around one fifth of suppliers has their supply chain already organised sustainably throughout. The vast majority of surveyed companies can fulfil various sub-areas of sustainability while less than 10% of respondents are not actively addressing the issue at all.**

Basis: EITW, supplier survey 2023: What are you doing in terms of sustainability? (multiple answers possible)
Suppliers n=220

# Sustainability is gaining in importance

**Suppliers 2022 & 2023**



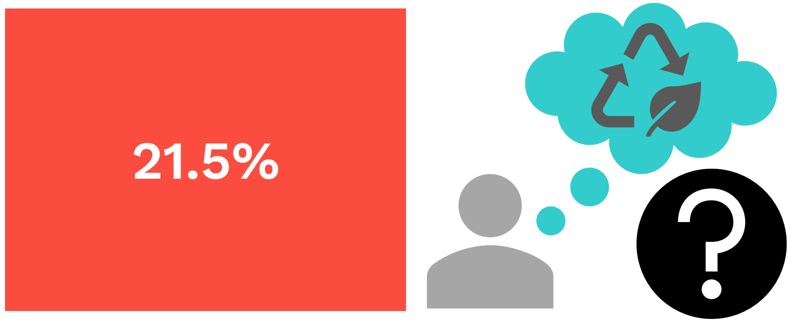

**For suppliers, implementing sustainability measures and corresponding communication around these actions are more important than official sustainability certificates. Overall, the importance of sustainability has increased since 2022.**

**Depending on venue type, the ratings differ: In general, conference hotels provide the highest ratings and event venues the lowest.**

Basis: EITW, supplier surveys 2022 & 2023: Please rate the importance of the following criteria when it comes to sustainability. (Please provide your rating on a scale of 1 to 10: 1 = not important; 10 = very important)
Suppliers n=220

# More interest in sustainable events than actual bookings

**Interest in sustainable events (enquiries)**




Approximately a fifth of all clients are interested in sustainable events. This share has tended to increase in 2022 compared to previous years (43% of suppliers reported a slight increase, 13% a strong increase, and 38% of businesses saw no change in interest). This indicates that organisers are more interested in sustainability which goes hand in hand with an increased awareness.

**Sustainable event bookings**

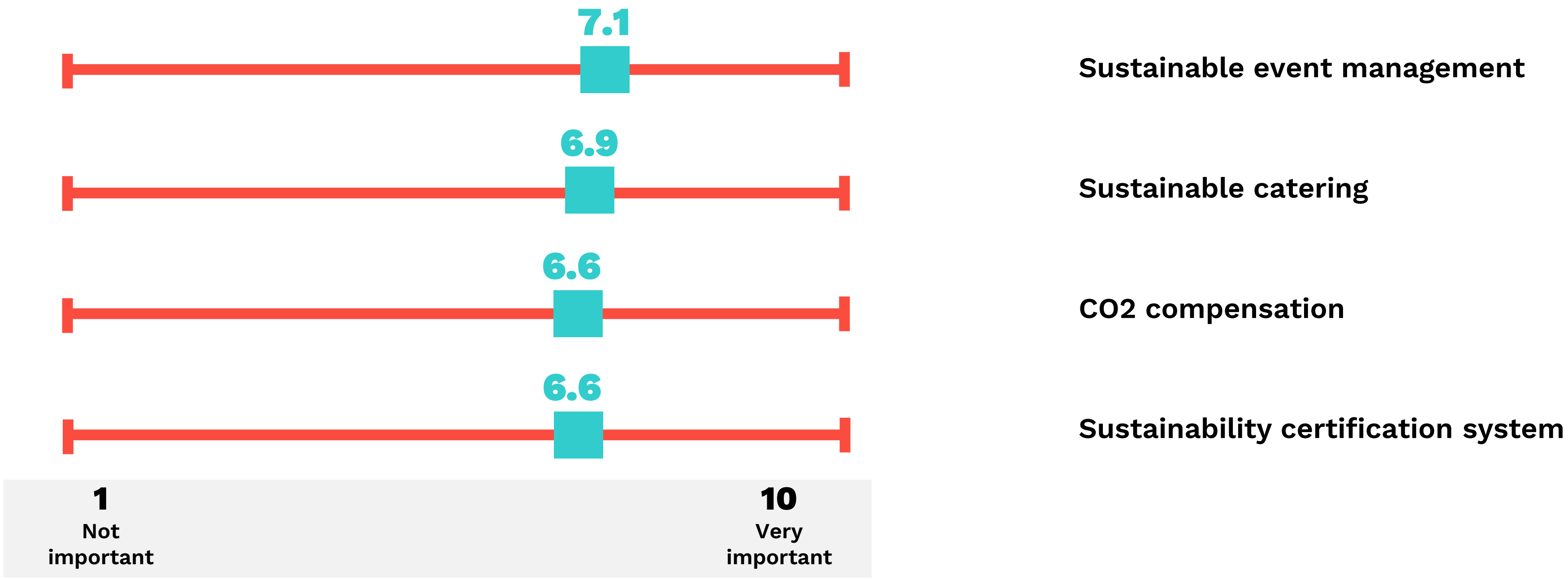

The share of clients who actually book a sustainable event is 13%, which is below the number of corresponding enquiries. This share has not increased in 2022 compared to previous years. For 62% of suppliers the share of sustainable event bookings has not changed, for 26% it has increased slightly while 10% report a strong increase.

**Event organisers are more interested in sustainable events, however, corresponding bookings have not gone up.**

Basis: EITW, supplier survey 2023: What percentage of your clients is interested in or books sustainable events? Please indicate the percentage and if or how this has changed in 2022 compared to previous years. Suppliers n=220

# Evaluation of various sustainability aspects

**Organisers 2023**




**On a scale of 1 of 10, organisers rate sustainable event management in general highly (7.1). Catering is just ahead of CO2 compensation and also beats sustainability certification systems. However, the importance of these aspects is considered as not as important in each case as sustainable event management in general.**

Basis: EITW, supplier survey 2023: How important is sustainability for you when planning events? (Please provide your rating on a scale of 1 to 10: 1 = not important; 10 = very important)
Organisers=625

# Saving resources and meeting client expectations are the most important reasons for sustainable events

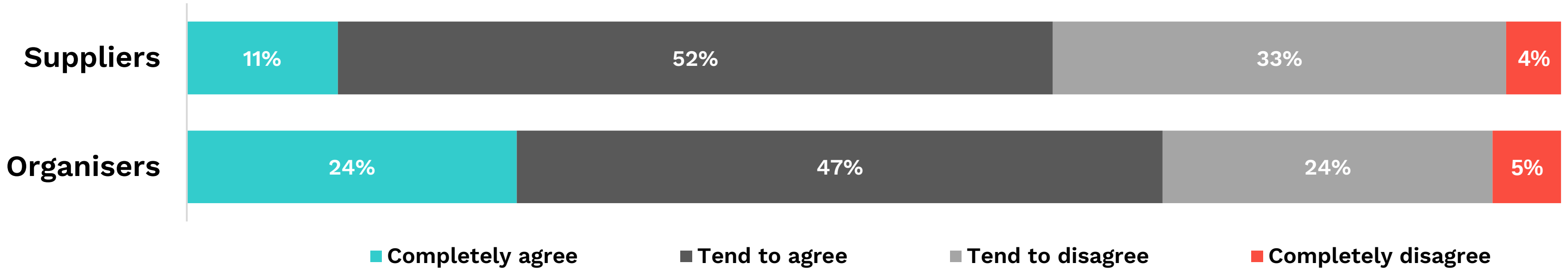

**Saving resources and attendee/client expectations were named as the most important reasons for planning sustainable events.**

**Basis: EITW, organiser survey 2023: For what reasons do you plan your events with sustainability in mind? (multiple answers possible)**
**Organisers n=622**

# Sustainability considerations influence event planning

**Statement: "Corporate decisions and thus event planning are more influenced by sustainability."**

Opinion on the statement




**More than 70% of organisers believe that sustainability will have a greater influence on corporate decision-making, which will also change event planning. Organisers are more convinced of that than suppliers.**

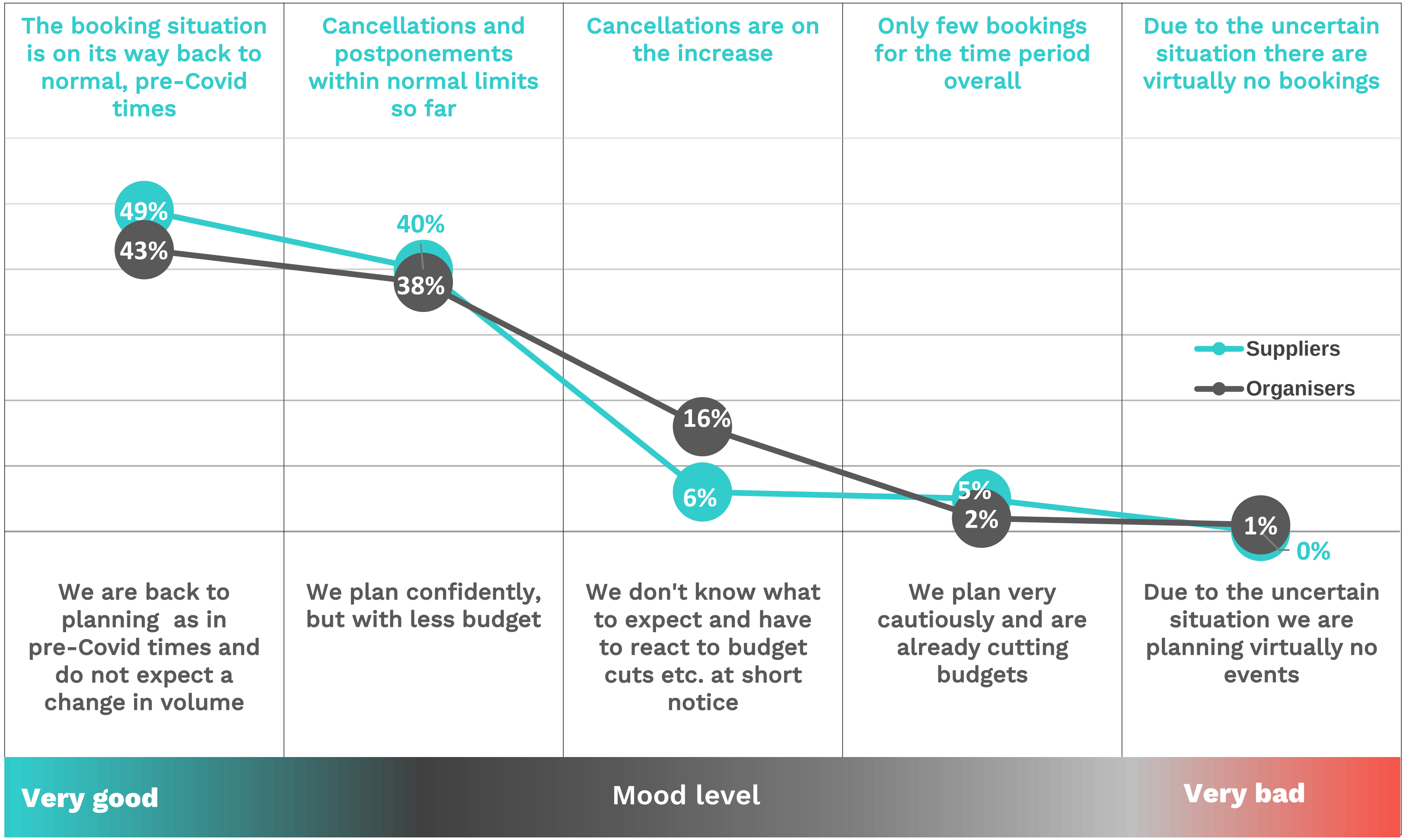
Basis: EITW, supplier and organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=176, organisers n=570

09

# Outlook & forecast

# The booking situation is moving towards "normal"

## Supplier and organiser outlook



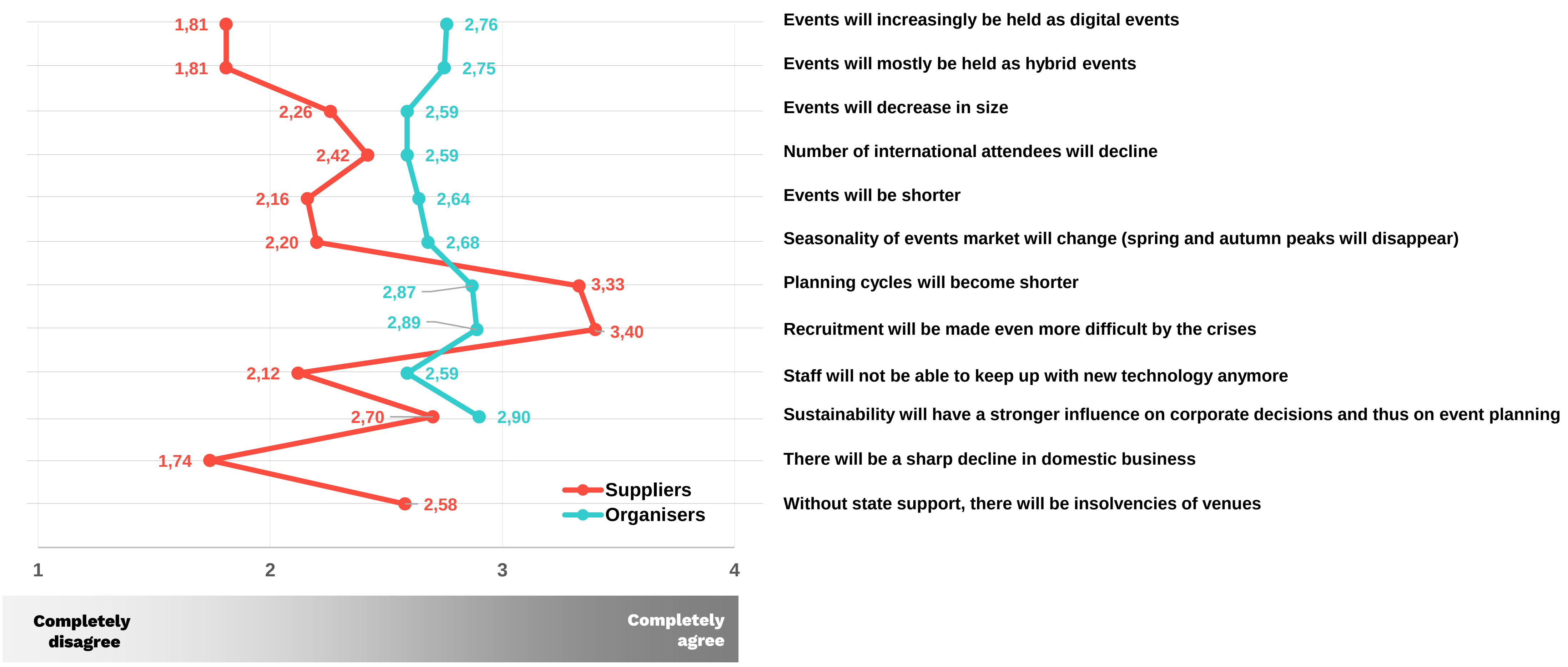

**The market is moving towards "back to normal". Suppliers and organisers are equally confident.**

**For the coming months, suppliers are somewhat more optimistic than organisers.**

Basis: EITW, supplier survey 2023: How do you assess the booking situation (both bookings and enquiries) at present and for the coming months?
Suppliers n=197
Organiser survey 2023: How do you assess the event planning situation in your organisation or at your clients' at the moment and in the coming months?
Organisers n=586

# Suppliers and organisers have different future outlook

## What is most likely to change with regard to business events in the future?

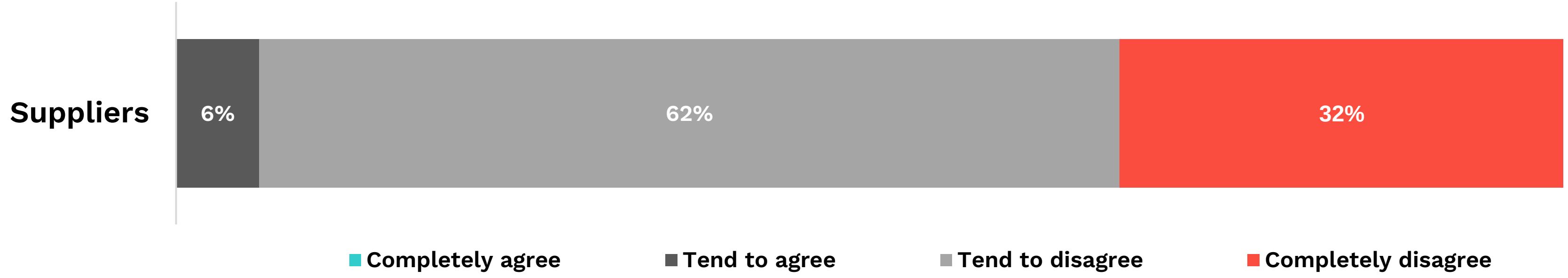



Basis: EITW, supplier and organiser 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=182, organisers n=590

# Suppliers are confident that domestic event market will remain stable

**Statement: "There will be a sharp decline in domestic business."**

**Opinion on the statement**

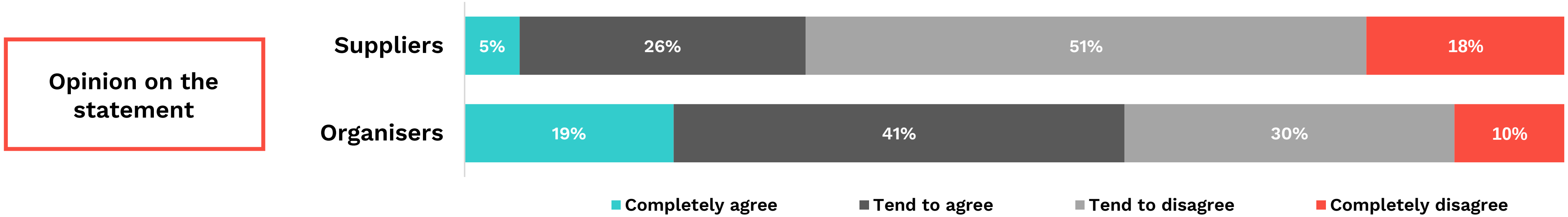



**More than 90% of suppliers do not expect a decline in domestic business, i.e., the events business in Germany will remain stable.**

Basis: EITW, supplier and organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=173

# Suppliers expect the seasonal nature of the market to remain the same

## Statement: "Seasonality of events market will change (spring and autumn peaks will disappear)"



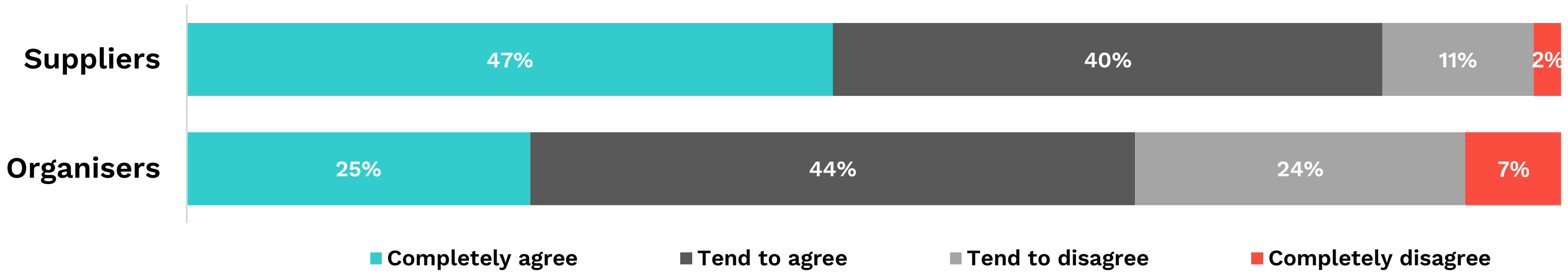

**Almost 70% of suppliers do not expect a shift in seasonality in the conference market. Organisers tend to agree with the statement.**

Basis: EITW, supplier and organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=165, organisers n=581

# Suppliers see a "last-minute enquiries" trend

**Statement: “Planning cycles will become shorter."**

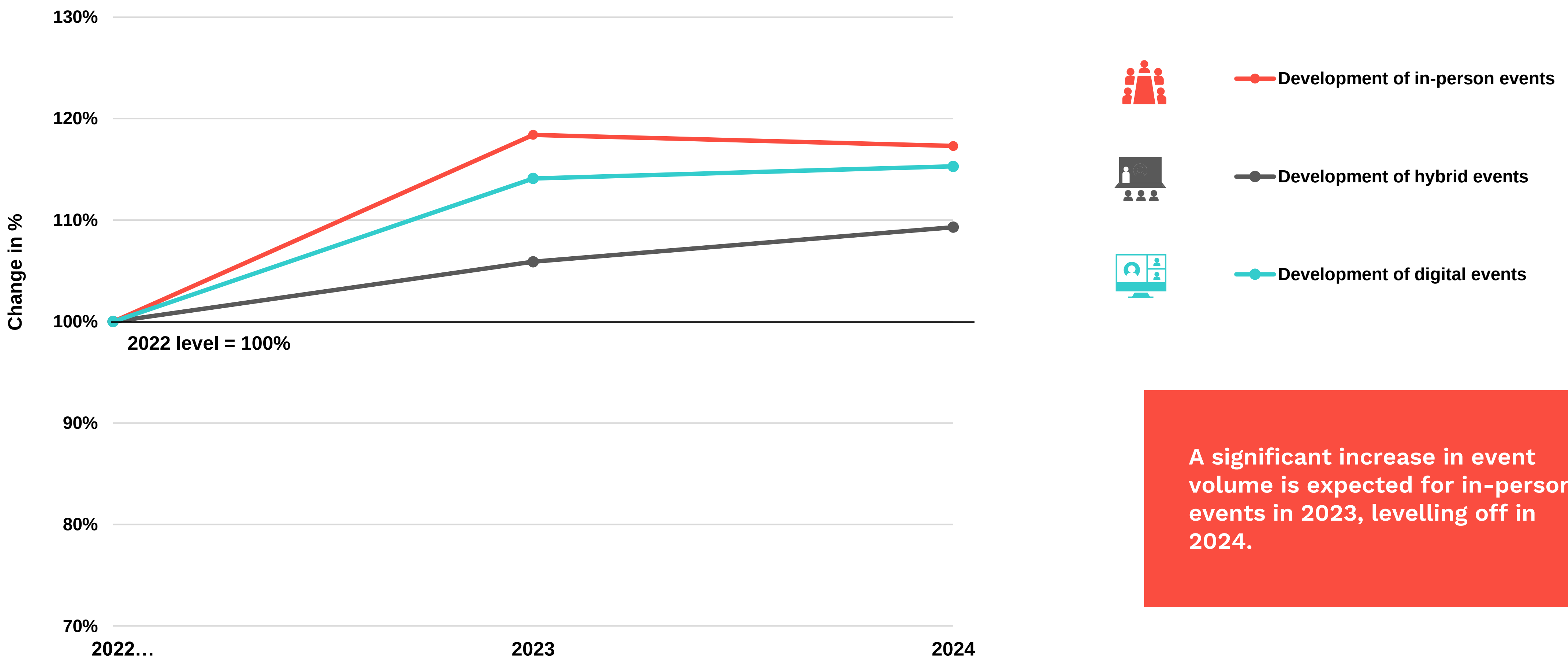
Opinion on the statement




**Over 80% of suppliers agree with the statement that event planning cycles are becoming shorter. This requires a high degree of flexibility.**

Basis: EITW, supplier and organiser survey 2023: How do you think the developments described will affect business events and event attendance in general?
Suppliers n=188, organisers n=576

# Suppliers and organisers expect more events in 2023




A significant increase in event volume is expected for in-person events in 2023, levelling off in 2024.

Basis: EITW, surveys 2023: What is your forecast for developments on the event market for the next two years? Please indicate by what percentage the number of events and attendees (online and in person) will change compared to 2022. If you cannot enter exact values, please indicate a tendency, if possible. Please select the expected change in the drop-down menu and enter the value in % in the column next to it (if the volume remains the same, please enter 0).

# 10 Project design

# ABOUT

**The annual Meeting- & EventBarometer is the only study analysing the German conference market as well as the country‘s event sector.**

**It was initiated by the GCB German Convention Bureau, the European Association of Event Centres (EVVC) and the German National Tourist Board (DZT). For the 17th time, the three partners have commissioned the European Institute for the Meetings Industry (EITW) to carry out the corresponding research.**

**For the third time, the Meeting- & EventBarometer 2022/2023 also surveys service providers for digital events (e.g., streaming studios, event platforms) alongside suppliers (venues) and event organisers. This takes into account the ongoing digitalisation, which has been given a boost by the Covid-19 pandemic, and makes the study more comprehensive.**

# Timeline of research

**October to December 2022:**
Preparation of questionnaires

**December 2022:**
Conducting tests to check feasibility

**January to March 2023:**
Surveying the different target groups:

- Suppliers, i.e. venues (online survey)
- Organisers (online survey)
- Service providers for digital events (interviews)

**March 2023:**
Auswertung der Befragungen

**March/April 2023:**
Projections

**April/May 2023:**
Reporting and presentation

1 2 3 4 5 6

Autumn 2022 — May 2023

A total of around 3,400 event venues throughout Germany with a capacity of at least 100 seats in their largest space (capacity information does not consider specific spacing requirements) were surveyed in an online survey from January to March 2023. In addition, around 2,300 event organisers worldwide were surveyed via a selected mailing list and around 5,000 event organisers via a pre-selected panel (companies with at least 100 employees that have either held an event in Germany in the last three years or are planning to hold such an event in 2023 or in the next two years for the source markets Germany, USA, United Kingdom, Austria, Switzerland, Netherlands and Belgium). Eight telephone interviews were conducted for the digital event service providers. In addition, links to the survey were distributed via trade publications and social networks in order to generate further responses.

The supplier survey represents the volume and structure of the event market while the current opinion of clients from Germany and abroad is represented by the organiser survey. The service providers for virtual events round off the overall picture.

**Please note**: All data (for events and attendees) relates to 2022 while forecasts relate to the current year 2023 and the future. The year 2021 was chosen as the reference point for changes regarding events, attendees and turnover.

Basis: EITW 2023

## SUPPLIERS

| |
|---|
| 44% |
| 33% |
| 23% |

n=506

**506 valid responses**

## ORGANISERS

| | Own distribution list | Panel |
|---|---|---|
| Germany | 69% | 20% |
| Europe | 16% | 60% |
| Rest of world | 15% | 20% |
| | n=231 | n=507 |

| | |
|---|---|
| 52% | Corporates |
| 18% | Associations |
| 10% | Agencies |
| 9% | Scientific institutions |
| 11% | Other |

**738 valid responses**

## Service prodivers for digital events

**8 interviews**

From the supplier side, there is sufficient data from all three types of event venues (event centres, conference hotels, event venues) to make valid statements.

Organisers can, on the one hand, be differentiated by origin (Germany, Europe, rest of world), and on the other, they can also be differentiated by their organisational form (companies, associations, agencies). Thus, the research captures different perspectives on what is happening in the meetings market.

For further details, please see the [EITW website].

# Projections (since 2021)

1

Establishing the number of in-person attendess and of events via the difference to the previous year

Basis: supplier survey
Rationale: same survey basis as in previous years
Differentation: by venue types

Further details on the EITW website.

2

Establishing the number of  digital and hybrid **attendees** and **events** via the distribution of attendees & events across the different formats (proportions)

Basis: German organiser survey

Rationale: organisers provide an overview of all events that took place (not just the ones in venues)

Differentiation: by organiser types

3

Checking the figures by comparing the data in the different surveys
Basis: all surveys
Rationale: Is the information provided in the surveys plausible?

# GLOSSARY

## Venue types

| | |
|---|---|
| EC = event centres | Event centres include congress centres, sports and multipurpose halls, arenas as well as community centres that were built to host events and do not offer accommodation. |
| CH = conference hotels | Alongside meeting facilities, conference hotels also offer accommodation. |
| EV = event venues | Event venues are special event spaces that have originally been built for purposes other than events. These include, e.g., palaces/castles, museums, factory buildings, studios, leisure parks, universities, airports, etc. |

## Event formats

| | |
|---|---|
| In-person events: | Events where attendees can only participate in person and on site (simple digital elements such as live Twitter reporting do not make events hybrid). |
| Hybrid events: | Events where attendees can choose between personally taking part on site (i.e., in person) or online, e.g. by joining live streams of sessions and/or webinars. These events simultaneously combine in-person events with virtual elements. |
| Digital events: | Events where attendees can only participate via stream/video conferencing or webinar software. There is no possibility to attend on site. The event can be produced in and broadcast from a studio or a venue with studio facilities (temporary or fixed). The staff on site are, however, not attendees in the actual sense. No further distinction between digital and virtual events is being made and the terms are to be understood as synonyms. |

# GLOSSARY

## Types of events:

| | |
|---|---|
| Seminars, meetings, congresses: | Business events for the purposes of knowledge exchange |
| Exhibitions/Presentations: | E.g., product presentations, smaller trade shows |
| Sports and cultural events : | Pop concerts, sport tournaments, etc. |
| Social events: | Events that are part of a larger event (e.g., a congress), such as drinks receptions, dinners, etc. |
| Local events: | Meetings of local associations and groups, e.g., charitable organisations |
| Festivities: | E.g., anniversaries, banquets, weddings, office or other parties (stand-alone events that are not related to another event) |
| Business events: | Business-related meetings and events, e.g., congresses, meetings, seminars and workshops but also university events, corporate PR events or corporate galas. |
| Events: | Entertainment and leisure events, such as social and cultural events, sports events and festivities, banquets and anniversaries |
| International events: | In-person or hybrid events with at least 10% of attendees from abroad attending on-site |
| (In-person) Attendees from abroad/International attendees: | Event attendees who live outside Germany |

## Abbreviations:

| | |
|---|---|
| DZT: | Deutsche Zentrale für Tourismus e.V. (German National Tourist Board) |
| EVVC: | Europäischer Verband der Veranstaltungs-Centren e.V. (European Association of Event Centres) |
| GCB: | German Convention Bureau e.V. |
| MEBa: | Meeting- & EventBarometer (Germany study) |
| MICE: | Meetings, Incentives, Conventions, Events |

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**Frankfurt/Wernigerode, May 2023**

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