Mapping the Event Industry

RESULTS

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Mapping the event industry

With 243,000 companies, roughly 81 billion in sales and 1.130 million employees, the event industry is one of the most important sectors of the German economy.

It is not only from the perspective of business and industry (in the context of trade shows, exhibitions, meetings, conventions and social events as well as marketing communication) that the event industry plays a special role.

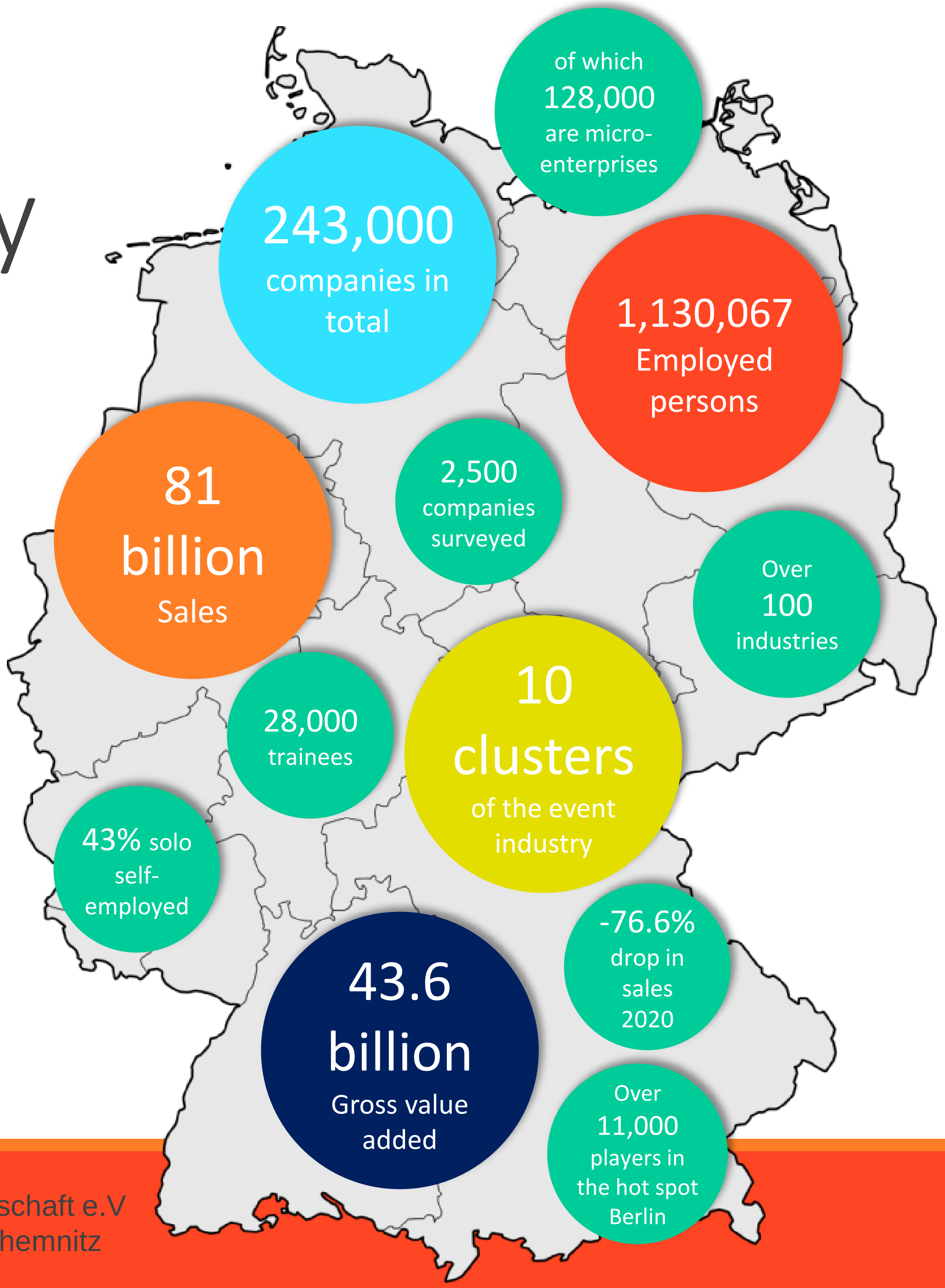
Rather, the last 18 months of the COVID-19 pandemic have revealed the value of the event industry for social and cultural life in Germany. Concerts, culture, music festivals, and clubs as well as private festivals and markets/showmen enrich and exert a formative influence on social life.

The event industry is very colorful and diverse. Artists, singers or musicians are prominently featured at events. Companies present themselves at trade shows or showcase their brand in the context of spectacular brand events.

Behind all this, however, is an important economic sector - diverse, extremely creative and with an incredibly broad field of activity characterized by a high level of division of labor, task sharing and networking.

For the first time, the study provides deep insights into the complexity of the industry and systematically identifies important value-adding partners and industry data.

At the same time, the study examines the current situation and for the first time opens up the prospect of providing a complex overview of the event industry. It thus represents an important step towards a uniform understanding of the industry.



The event industry in Germany

Study methodology

Level 1

The number of companies in the event industry was previously unknown. The present study is based on a qualified nationwide search for companies in the event industry. This included searching available databases and the evaluation of existing studies. In addition, detailed expert interviews were conducted with industry associations of the IGVW Interessengemeinschaft Veranstaltungswirtschaft e.V. (Event Industry Interest Group).

This became the foundation for the systematic cataloging of companies in the event industry based on the 2008 edition of the German Classification of Economic Activities (WZ 2008) and the sales tax statistics (German Federal Statistical Office, 2020). It revealed that companies in the event industry are active in more than 100 economic sectors. The results of this analysis define the population of event industry players - a total of 243,000 companies, 128,000 of which are micro-enterprises with less than 22,000 euros in sales per year.

Level 2

Quantitative survey of more than 2,500 companies in the event industry in Germany during the period April-May 2021. The invitation to participate in the survey was disseminated via a large-scale campaign on social media, the website ZÄHL DAZU (COUNT US IN (www.zaehl-dazu.de) and by personal invitation via the participating industry associations. The study was funded via a crowdfunding campaign that involved the entire event industry.

Level 3

The analysis and extrapolation of the data was based on the information on sales volume classes in the sales tax statistics (German Federal Statistical Office, 2020). See also the statistical appendix to the study.

The data on companies' sales and employees refer to the year 2019 in order to reflect the "normal state" of the event industry before the pandemic crisis.

The map of the event industry (attribution of the total population to individual federal states) was created using a defined distribution key of selected subsectors of the event industry based on sales tax statistics (German Federal Statistical Office, 2020).

The event industry in Germany

Study methodology

Classification of the results and differentiation from previous studies

This study focuses on the **core area of the event industry.** In doing so, it looks at key players who can initially be assigned to five basic subsectors. In other words, the study includes event organizers, venue operators, service providers, entertainment and creative professionals, and manufacturers who produce products and services for the event industry.

The study examines these players in their value creation network. The aim is to capture industry performance in its entirety. This includes a definition and delimitation of the event industry and requires a comprehensive view of the services offered by individual players. This view makes it possible to distinguish the diversity of the event industry compared to other industries, and reveals a high degree of complexity and networking within the event industry.

However, the study **does not consider spillover effects** on other industries. Yet at the same time it is known that the event industry - e.g. in the area of business-induced events, but also in the areas of the culture and music industries - generates considerable economic effects in other sectors. Travel/accommodation and catering costs, for example, play a major role in tourism and gastronomy.

In contrast to the meta-study "The macroeconomic significance of the event industry" (R.I.F.E.L, 2020), these spillover effects are not considered in the present study. Rather, the aim was first to systematize the core area of the event industry within narrow limits and, building on this, to conduct a comprehensive analysis of the industry's performance. Thus, the results of the two studies are not directly comparable, since the R.I.F.E.L. meta-study, for example, explicitly considered travel expenses, event-related expenses and exhibitor expenses.

The study presented here, on the other hand, looks primarily at players who are directly involved in the planning and production of events.

(1) Players and networking (Ten subsectors of the event industry)

Players and networking

Players in the event industry

In essence, the study first defines five central areas of activity in which the players in the event industry operate, supporting and characterizing these in terms of content.

- (Turquoise) Organizing companies
- (Red) Venues and spaces
- (Orange) Service provision
- (Blue) Entertainment and creatives
- (Yellow) Manufacturers

This makes it clear that although the actors have a broad field of activity overall, they often have a clear focus, which formed the basis for classifying them in central areas of activity. In addition to this focus, however, the players take on very different roles in order to provide their holistic range of services in the event industry. At the same time, the areas within the event industry are closely interlinked. The diversity and complex interdependencies are key characteristics of the industry.

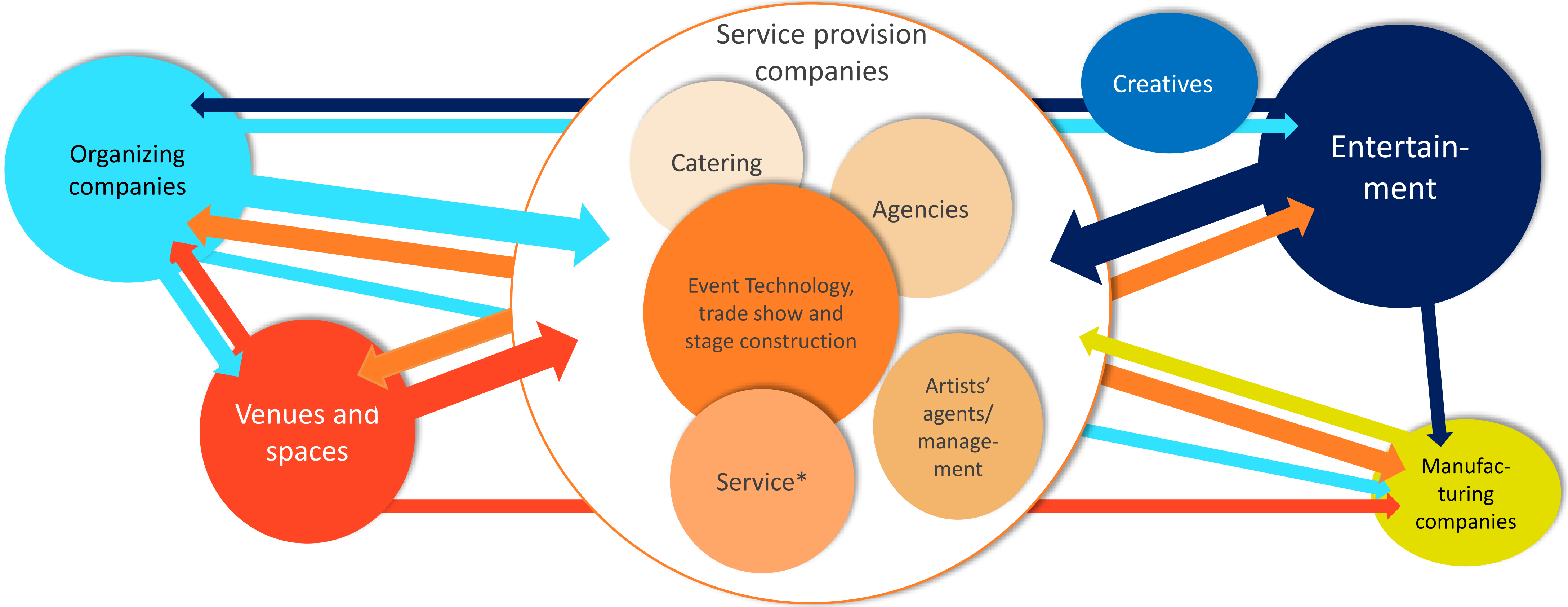
As a result of a cluster analysis, this study identifies a total of 10 clusters that facilitate a differentiated view of the activities in the event industry (subsectors).

These clearly delineated subsectors form the foundation for the development of a long-term, target-oriented definition of the event industry, which in particular enables differentiation from other sectors of the economy.

At the same time, this provides a basis for estimating the performance of the event industry as a whole.

Players and networking

Players in the event industry – Ten clusters in the event industry



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A study by Interessengemeinschaft Veranstaltungswirtschaft e.V
in co-operation with the R.I.F.E.L. e.V. and the TU of Chemnitz

The size of the clusters is based on their share of the total number of companies (sales/year >22,000 euros) in the event industry. For example, service providers account for 60 percent of the total number of companies.

*) Service includes the areas of security, personnel, ticketing, logistics.

Players and networking

Description of the foci of activity – 10 clusters of the event industry

Event Organizers are characterized as players whose main field of activity is the planning and execution of events. In the present study, this includes organizers of trade shows and exhibitions, conventions and meetings, music events (e.g. concerts, tours, festivals, clubs), cultural events (e.g. theater, opera, readings, etc.), private and social festivals or sports events. In addition, there are organizers of markets (e.g. Christmas markets, funfairs).

The ***venues and spaces*** subsector includes players who primarily offer different venues and spaces (e.g. trade show and exhibition halls, event and convention centers, local event facilities, meeting and convention hotels, event venues, stadiums, open spaces, guest rooms and clubs) and in some cases simultaneously act as organizers as well.

➔ Overlaps between event organizers and venues and spaces are fundamentally possible. However, each actor is assigned to exactly one cluster in the present study based on its activity focus.

The ***service provider*** subsector plays a special role in the event industry. In particular, the complexity of the sector becomes clear here and reveals the deep roots of the event industry in technical and service-oriented areas. Moreover, there is a broad (specialist) planning and creative expertise. The service provider subsector is therefore differentiated in greater depth.

Players and networking

Description of the foci of activity – 10 clusters of the event industry

Service providers as players in the event industry

The ***agencies*** subsector often forms the creative starting point in the event industry. We include here primarily event agencies, agencies for live communication, graphic and communication agencies, trade show construction agencies, management consultancies and the area of designers/architects. In addition, there is the digitalization subsector (online/hybrid, platforms for visitor management, etc.).

The subsector of ***trade show construction and event technology*** plays a key role in the implementation of events. This includes both the structural implementation in the area of trade show/stage/grandstand and bleacher construction as well as the technical planning and realization of events in the areas of lighting, sound, camera/video, AV media technology, stage technology, rigging as well as energy technology and special effects. At the same time, (technical) specialist planners (e.g. event and occupational safety, project and production management) as well as lessors of (technical) infrastructure and equipment can be found here.

The ***artists' agents and management*** subsector includes artist agents, organizers, booking, and artist and tour management.

Catering is another area of service provision in the event industry. This primarily includes event catering businesses as well as selected hotels and restaurants that focus on event catering. This area also includes market stalls that are particularly active in the context of festivals and markets (e.g. food trucks).

The ***service*** subsector includes companies which in turn act as service providers in the sector and provide important services (in some cases for other service providers). These include primarily providers of personnel services, security service providers for visitor and event security, as well as ticket service providers and logistics. However, other service areas, such as facility management or hygiene services, are also included in this subsector.

Players and networking

Description of the foci of activity – 10 clusters of the event industry

The ***entertainment*** subsector in the study includes musicians, singers, bands/DJs, actors, dancers, comedians, showmen and market traders, as well as moderators and speakers. In other words, all those who perform on stages and at markets during events and provide content.

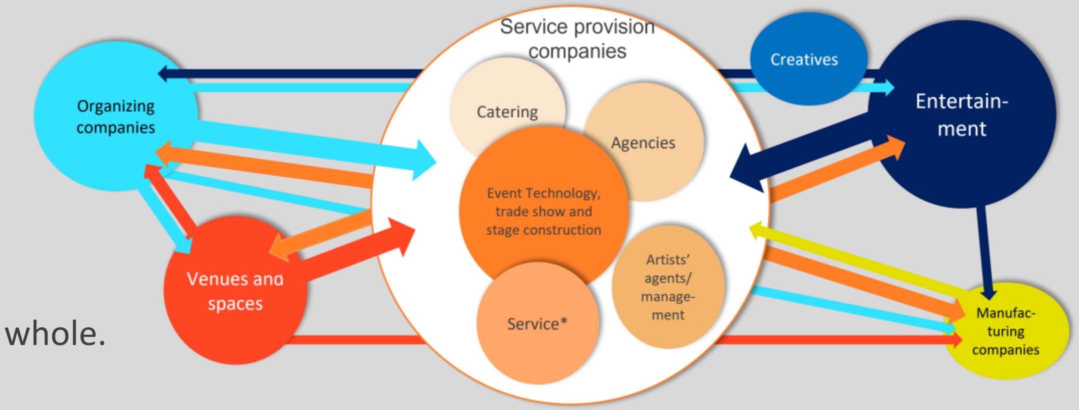
Creative professionals likewise fall into the artistic-creative subsector. This cluster includes players who work in the field of event management, particularly through creative technical work, which includes the areas of film/sound (e.g., directors, filmmakers, sound contributors), creatives in the area of design, graphics, designers, sound/lighting design, web design), and journalistic and photographic press work.

The ***manufacturers*** subsector consists of players who manufacture products for the event industry, particularly in the areas of technology (e.g. sound/lighting/camera/AV/stage technology) and infrastructure (e.g. furniture, equipment/tents/mobile infrastructure).

The graphic overview visualizes fundamental interdependencies and outlines the "ecosystem" of the event industry.

The results of the study help to assess the relevance of individual value creation partners and their significance in the value creation network.
The complexity and multidimensionality thus become visible.

This provides a basis for rendering the functioning of the event industry tangible for the first time and for establishing its significance for the German economy as a whole.



Players and networking

Definition of the event industry

The event industry includes all service areas involved in the planning, organization, realization and follow-up of events as self-employed persons, freelancers or employees. This includes event organizers, venue operators, all event-related services, entertainment and creative professionals as well as manufacturers of products for the event industry.

An event is defined as a business- or leisure-oriented function.

Business-oriented events (B2B) include trade shows, exhibitions, conventions, conferences, meetings and events of political players, as well as brand (experience) events, product presentations, and employee and customer events.

In contrast, **leisure-oriented events (B2C)** include concerts, festivals, music clubs, theater, opera, readings, comedy, sports events, private and social celebrations, as well as markets and funfairs.

2) Facts and figures at a glance (key results)

Facts and figures

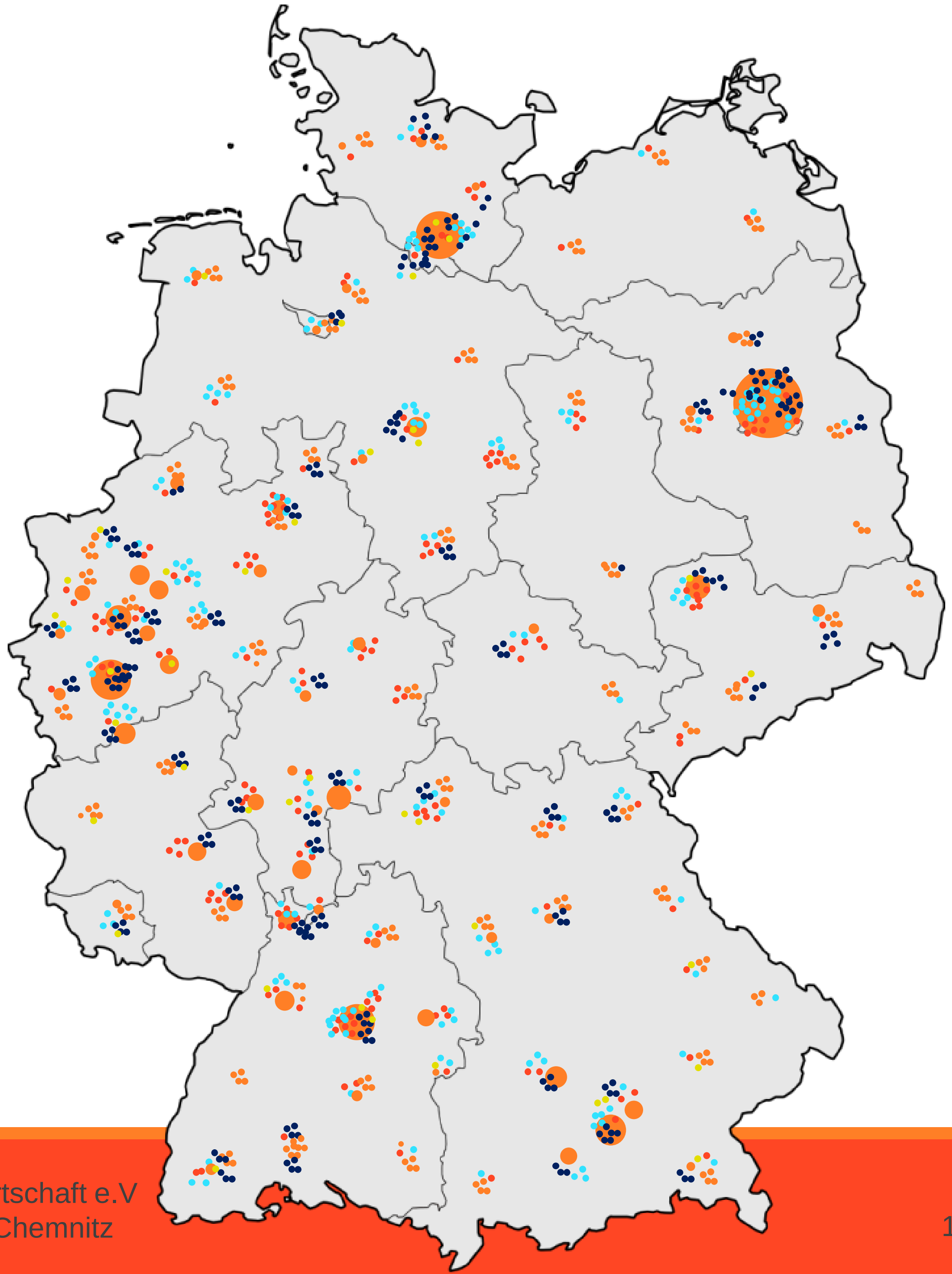
Mapping the event industry – hot spots

The event industry is an extraordinarily important sector of the German economy.

The chart shows regional concentrations of key players within two-digit zip code areas. The foci of activity are color-coded in each case.

- (Turquoise) Organizing companies
- (Red) Venues and spaces
- (Orange) Service providers
- (Blue) Entertainment and creatives
- (Yellow) Manufacturers

The size of the dots indicates the regional concentration for the service provider subsector (orange). For the other subsectors, the number of dots represents the number of players corresponding to the regional weighting.



Facts and figures

Mapping the event industry – the total number of companies

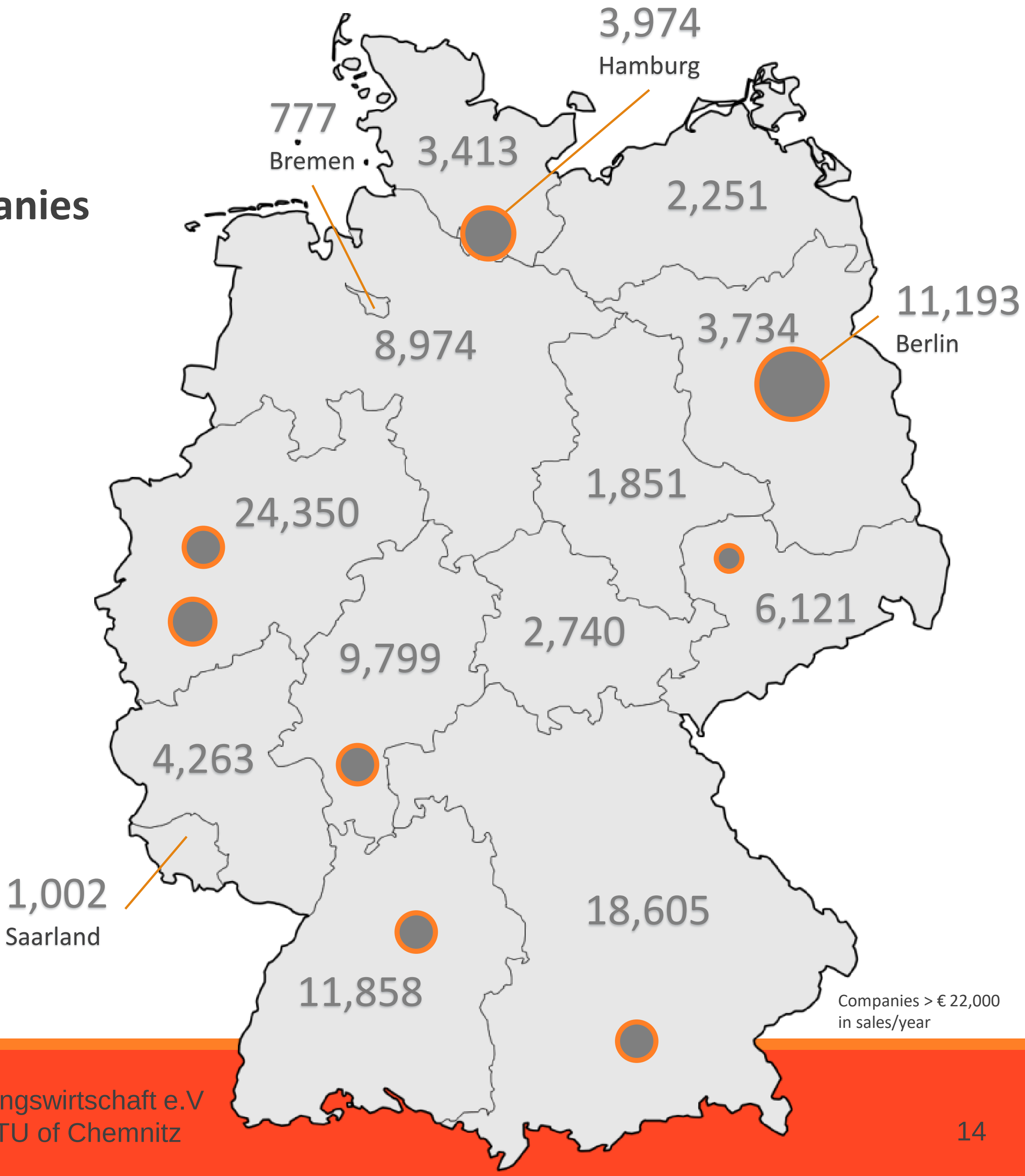
The map shows the number of companies in the event industry by federal state.

In Germany, almost **115,000 companies work as core players** in the event industry (sales/year > 22,000 euros). The main field of activity of these companies is in the area of business-oriented events (e.g. trade shows, exhibitions, conferences, meetings) as well as in the area of leisure events with a focus on music and cultural events but also private or social events.

The number of companies reflects the visualized aggregations. **Berlin, Hamburg, North Rhine-Westphalia as well as Munich, Frankfurt, Stuttgart and Leipzig represent important centers of the event industry.**

Solo self-employed persons account for about 43 percent of these companies.

In addition, there are **128,000 micro-enterprises** that generate sales of less than 22,000 euros per year. Thus, in total we are talking about **243,000 companies** that are active in the event industry in Germany and generate roughly **81 billion euros in sales**.



Facts and figures

Mapping the event industry – companies > 10 million

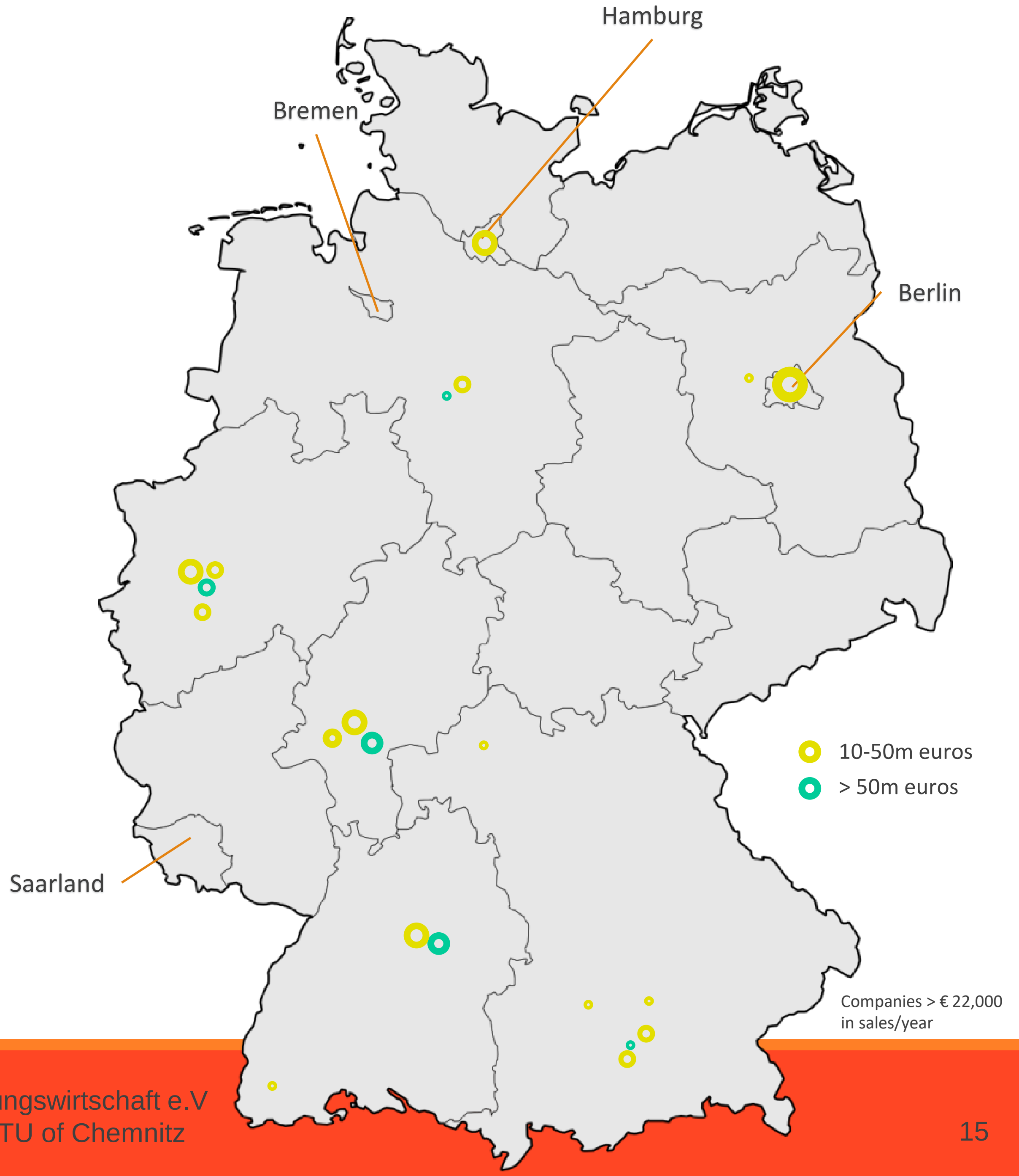
The map shows concentrations* of companies with more than € 10 million in sales per year.

It reveals that large companies in particular are located in hot spots of the event industry.

Berlin, Hamburg, North Rhine-Westphalia, Frankfurt, Stuttgart, and Munich are thus important centers of the event industry.

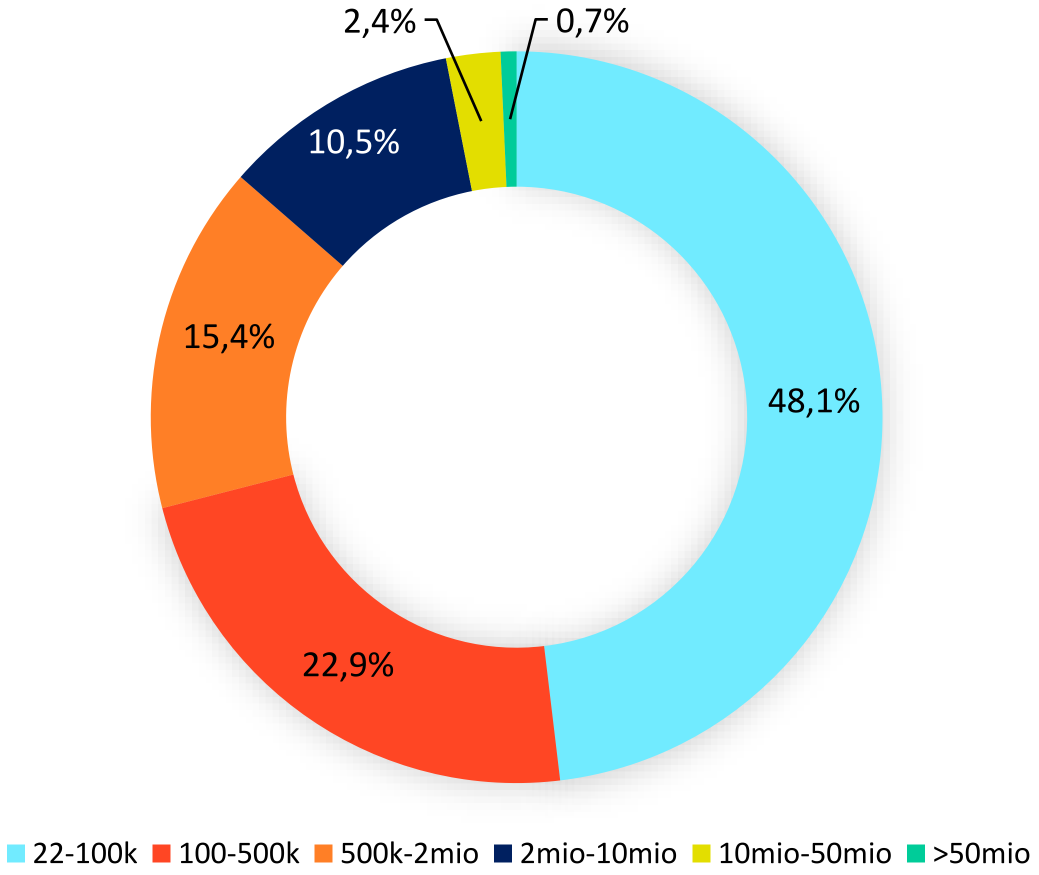
*) We are referring to clusters of companies with more than € 10 million in sales per year. This does not rule out the possibility that there are individual companies in a region that achieve these sales figures.

The size of the rings indicates the number of companies in the respective sales class.



Facts and figures

Total sales – sales volume classes



The map shows the sales volume of the companies in the event industry by sales volume class.

According to the study, almost half of the companies generated sales of between 22,000 - 100,000 euros per year in 2019.

Just under a quarter achieved sales of up to 500,000 euros, and one in six generated up to 2 million euros.

Around 10 percent achieved sales of up to 10 million euros. Only 3.1 percent achieved sales of more than 10 million euros.

Facts and figures

Key figures for the event industry

The key figures show sales of 80.7 billion euros for the event industry in 2019. Of this, the largest share of 27.7 billion euros was accounted for by the trade show stand construction and technology subsector. Organizers account for the second-largest share of sales at just under 14 billion.

The gross value added of the event industry amounted to 43.6 billion euros. The gross value added* indicates the added value created in the event industry in the process of service provision.

The event industry recorded a total of employed persons of 1.130 million for 2019. Of these, core employees accounted for about half (565,190). These included full-time and part-time employees subject to social insurance contributions as well as self-employed persons and freelancers (≙ number of companies). In addition, there is the category of marginally employed persons (564,877), consisting of marginally employed entities (≙ number of micro-enterprises with sales/per year <22,000 euros) and marginally employed workers.

By its very nature, the event industry is largely dominated by service provider companies. The number of marginally employed persons is particularly high, for example, in the catering and service provider subsectors (e.g. personnel and security services) - sectors that often rely on seasonal and temporary jobs.

In addition, around 28,000 people were in trainee positions in the event industry.

*) Gross value added is based on data from the National Accounts, Federal Statistical Office, 2021. Analogous to the sales volume classes, economic sectors relevant to the event industry were taken into account.

Facts and figures

Key figures for the event industry

Key figures for the event industry in 2019 – economic statistics

	Total	Organizing companies	Venues and spaces	Agencies	Trade show construction & event technology	Artists' agents/ Management	Catering	Service	Entertain-ment	Creatives	Manufac-turers
Companies/Self-employed											
Total companies	243,128	35,969	15,753	24,784	77,147	5,528	16,581	10,400	40,166	16,061	739
of these:											
Self-employed ≙ No. companies (owners/freelancers)	114,906	15,824	10,296	12,594	37,490	2,523	10,203	6,087	12,650	6,704	535
Microenterprises (< € 17,500)	128,222	20,145	5,457	12,190	39,657	3,005	6,378	4,313	27,516	9,357	204
Sales and gross value creation											
Total sales (in thousands)	80,708,043	14,064,266	6,829,372	8,840,871	27,972,701	909,389	5,925,237	6,004,492	4,596,234	2,213,634	3,351,848
of which sales (in thousands) of microenterprises	975,717	133,404	60,027	35,453	286,623	25,535	62,823	35,307	259,509	75,816	1,221
Total gross value added (in thousands)	43,623,781	8,342,922	3,787,570	4,604,325	15,435,336	460,151	2,867,815	3,013,054	2,763,715	1,202,224	1,146,667

Facts and figures

Key figures for the event industry

Key figures for the event industry in 2019 – employed persons

		Total	Organizing companies	Venues and spaces	Agencies	Trade show construction & event technology	Artists' agents/ Management	Catering	Service	Entertain-ment	Creatives	Manufac-turers
Employed persons total		1,130,067	188,785	201,902	70,669	237,741	7,296	114,110	218,603	53,206	19,715	18,040
Core employed persons		565,190										
Self-employed ≙ No. companies (owners/freelancers)		114,906	15,824	10,296	12,594	37,490	2,523	10,203	6,087	12,650	6,704	535
of which solo self-employed		42.8%	20.3%	0.8%	37.6%	55.1%	62.2%	27.0%	29.6%	70.4%	80.2%	19.4%
Employed persons subject to social insurance contribu-tions	Full-time	330,297	36,957	62,508	27,827	103,856	1,256	37,304	36,823	5,681	2,455	15,630
	Part-time	119,987	22,645	23,964	6,723	24,595	198	13,816	22,916	3,260	549	1,321
	Trainees	28,005	4,315	5,657	2,377	11,869	164	1,824	894	371	208	325
Marginally employed persons		564,877										
Microenterprise owners (< € 22,000)		128,222	20,145	5,457	12,190	39,657	3,005	6,378	4,313	27,516	9,357	204
Marginally employed entities		436,655	93,214	99,677	11,335	32,144	314	46,409	148,463	4,098	650	351

(3) Mapping the Event Industry (Results by subsector)

Mapping the event industry

Significance of the event industry in the German federal states

It is clear that the various clusters of event management are economically very significant for the respective state in which the company is located. For a great many companies, their own federal state is the most important location. Regional focal points and hot spots are evident, but so is the economic interdependence among the German federal states.

The **organizing companies** focus heavily on their respective state and/or neighboring states; only every fifth organizing company operates nationwide. In terms of international activities, one in four organizing company is active throughout Europe and only one in ten operates on a global basis.

As expected, the **venue operators** are active mainly in their own state. Only a small proportion also operate venues in other German states or abroad.

In line with their activity profile, the **service providers** have a much broader regional field of activity overall. Even if the focus of activity for many service providers is in their own federal state, they often operate in adjacent states as well. Just under 40 percent have no clear focus within Germany and are active throughout the country. One in two service providers is also active throughout Europe, and one in three operates worldwide. The data reveals that service providers from the event hot spots are particularly mobile.

The **entertainment and creative** cluster likewise has a very broad field of activity. Thirty-five percent are active throughout Germany in addition to their own and predominantly neighboring states. Another 40 percent are active throughout Europe and just under 30 percent worldwide.

More than 70 percent of the **manufacturers** of products focusing on the event industry are active throughout Germany. Business relationships are also strong internationally. More than half of the players are active in Europe and/or worldwide.

Mapping the event industry

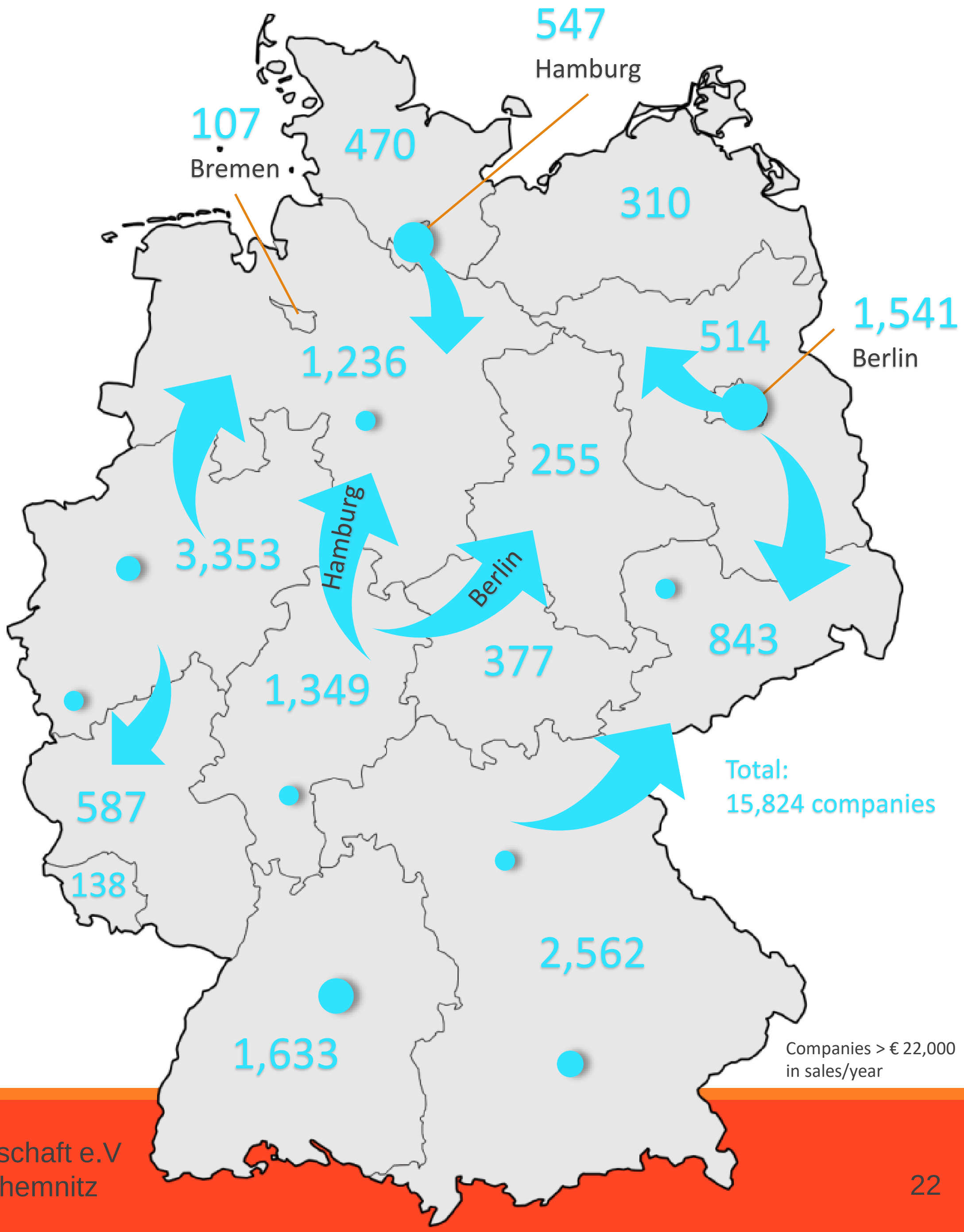
Mapping the event industry – organizing companies

The overview shows the number of organizing companies per state identified during the study (n=15.824).

The vast majority of organizing companies operate within their respective states, with spillover effects particularly in neighboring states.

Roughly one in five organizing companies operates nationwide, whereby organizing companies from “hot spot” regions (e.g. Berlin, Hamburg) are more frequently active throughout Germany (up to 54%).

About one in four organizing companies (27.8%) operates throughout Europe. Ten percent operate worldwide.



Companies > € 22,000 in sales/year

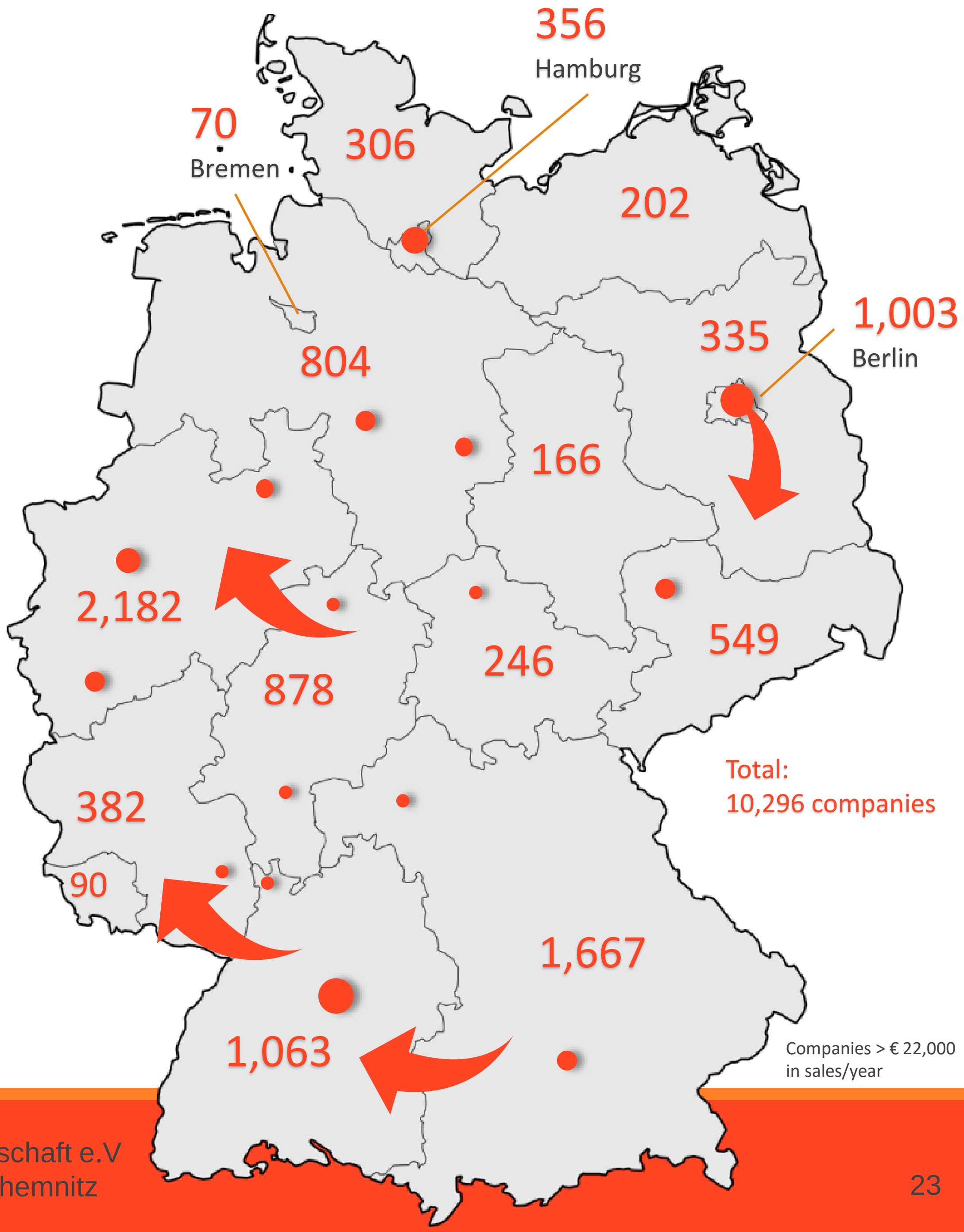
Mapping the event industry

Mapping the event industry – venues and spaces

The overview shows the number of venue operators per federal state identified in the study (n=10,296).

Even more than in the case of event organizers, the company's own state is particularly relevant for its activities. Spillover effects become relevant only if a company operates venues in other states.

Only a small proportion of venue operators are active throughout Germany. The proportion of companies operating throughout Europe (10%) and worldwide (4%) is lower than for event organizers.



Companies > € 22,000 in sales/year

Mapping the event industry

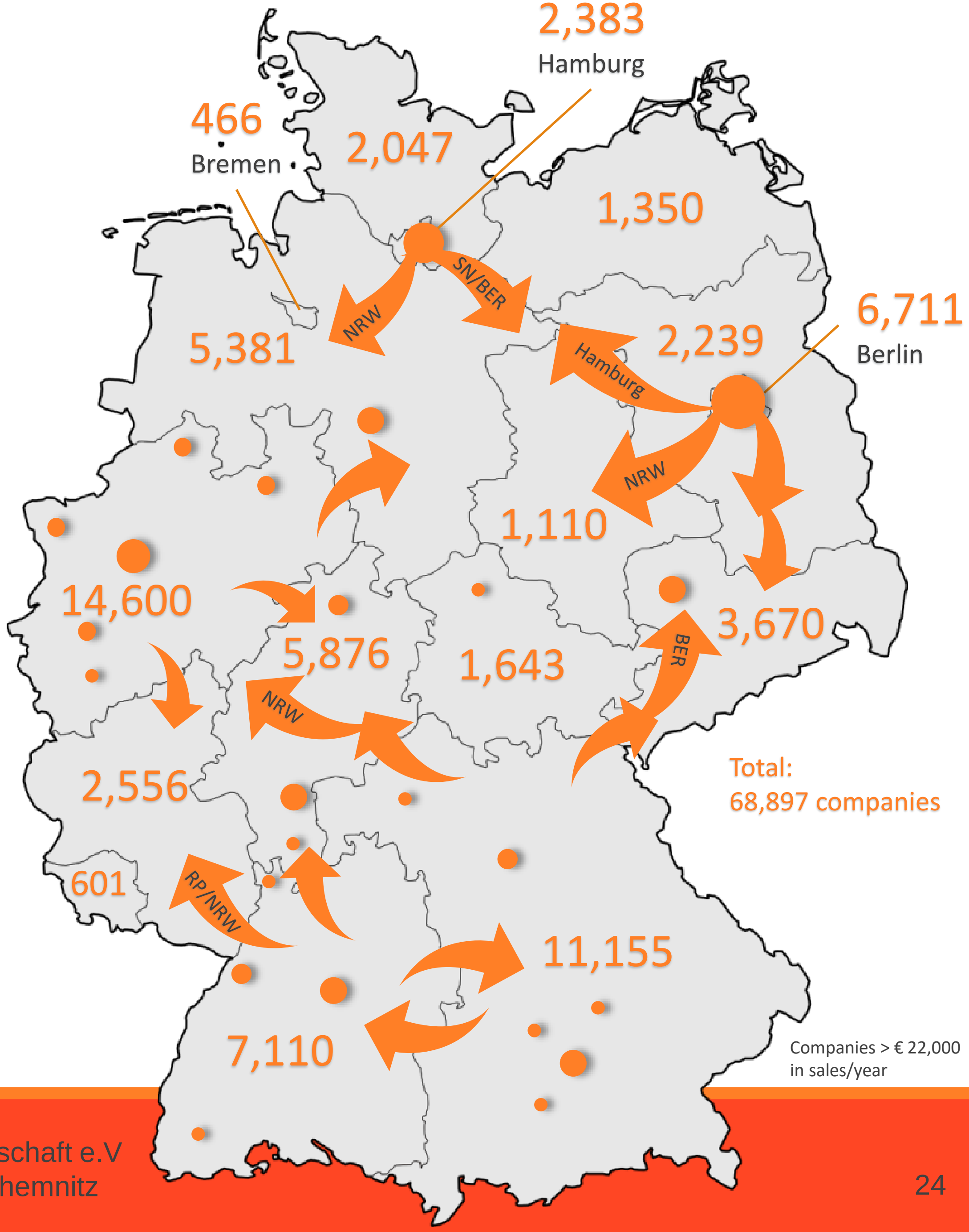
Mapping the event industry – service providers

Here, too, it is evident that service providers (n=68,897) in Germany often focus on their own state. Stronger spillover effects are found mostly in neighboring states or in event hot spots (e.g. Hamburg, North Rhine-Westphalia, Berlin or Bavaria).

Overall, however, just under 40 percent of service providers operate throughout Germany. Moreover, one in two is also active throughout Europe, and just under a third worldwide. This is more often the case for service providers from hot spot regions.

Service providers - numbers by subsector and federal state

	Agencies	Trade show construction and technology	Artists' agents/management	Catering	Services
Baden Württemberg	1.300	3.869	260	1.053	628
Bavaria	2.039	6.070	409	1.652	986
Berlin	1.227	3.652	246	994	593
Brandenburg	409	1.218	82	332	198
Bremen	85	254	17	69	41
Hamburg	436	1.297	87	353	211
Hesse	1.074	3.197	215	870	519
Mecklenburg-Western Pomerania	247	735	49	200	119
Lower Saxony	984	2.928	197	797	475
North Rhine-Westphalia	2.669	7.945	535	2.162	1.290
Rhineland Palatinate	467	1.391	94	378	226
Saarland	110	327	22	89	53
Saxony	671	1.997	134	544	324
Saxony-Anhalt	203	604	41	164	98
Schleswig-Holstein	374	1.114	75	303	181
Thuringia	300	894	60	243	145



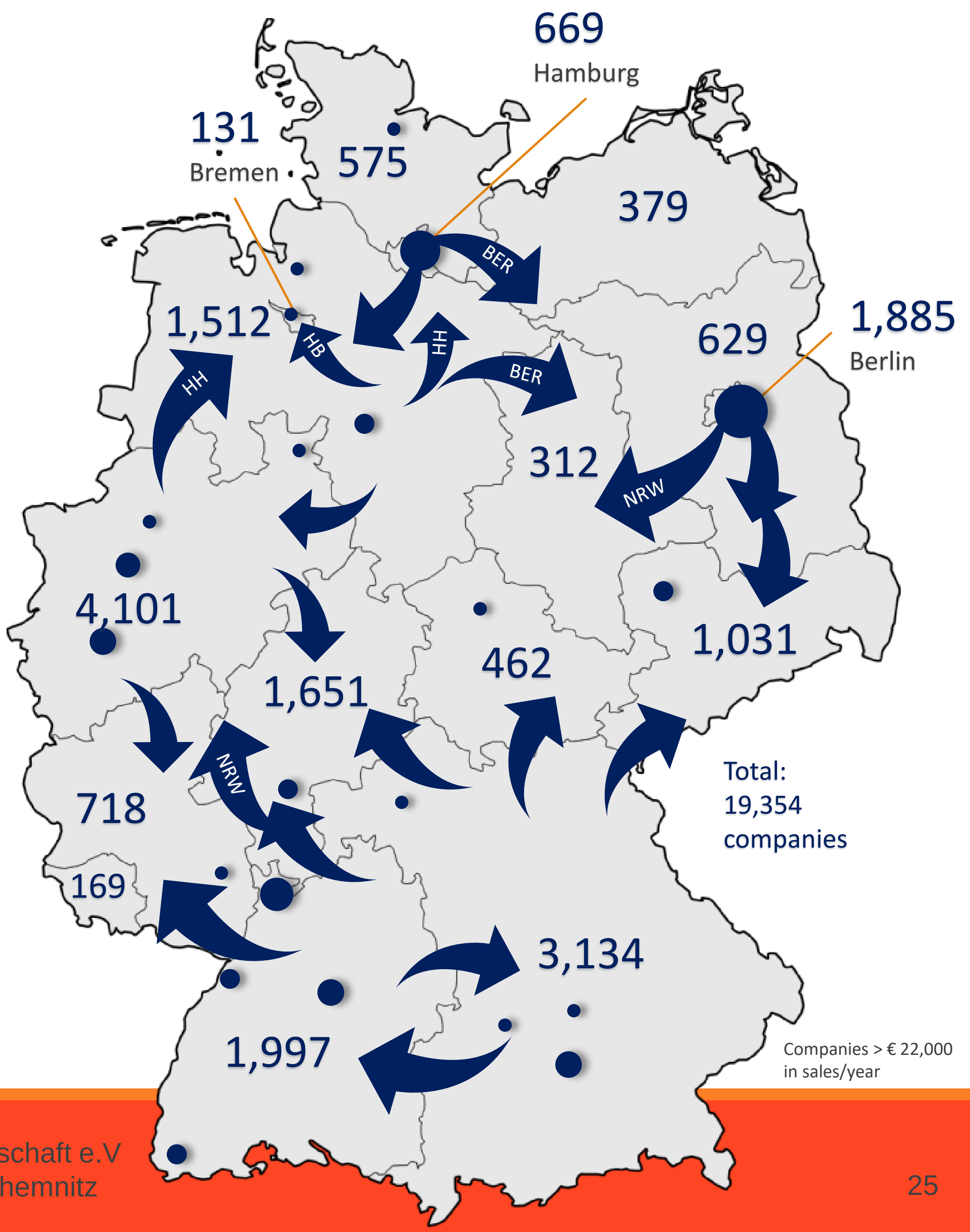
Mapping the event industry

Mapping the event industry – entertainment and creatives

The overview shows the number of entertainment and creative professionals identified per state in the study (n=19,354).

In this cluster, the focus of activity is also initially on the company's own state. Overall, however, the field of activity is more extensive, similar to that of the service providers.

Here as well, there are many supra-regional activities - about 35 percent are active throughout Germany. In addition, 40 percent operate throughout Europe and almost one in three is active worldwide.



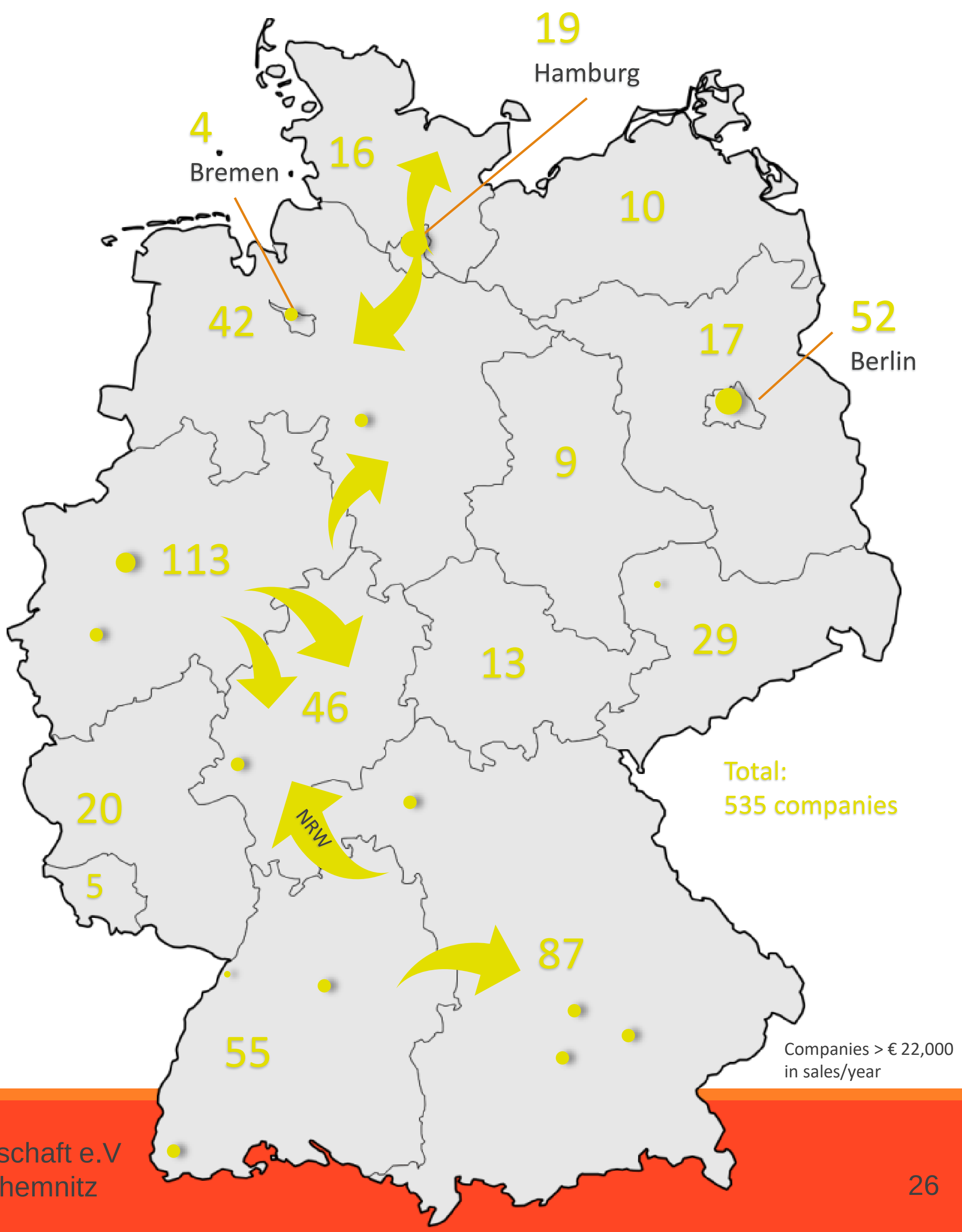
Mapping the event industry

Mapping the event industry – manufacturers

The overview shows the number of manufacturers identified in the study, i.e., companies that manufacture products for the event industry, particularly in the areas of technology and infrastructure, per German state (n=535).

A high proportion of manufacturers are active throughout Germany (72 percent). Thus, their activity focuses largely on companies in the event industry. Here, too, there are concentrations in event hotspots.

More than half of the players are also active in Europe and worldwide.



(4) Event subsectors and activity profiles

Event subsectors of the players

Event areas – General overview

The players included in the study work in different event areas. In particular, the broad spectrum in which the players are active is also evident here.

Around 40 percent work for both business- and leisure-oriented events. This is particularly evident in the venues cluster and in the trade show construction and technology cluster. Accordingly, both subsectors operate largely as generalists.

Business-oriented events include on the one hand trade shows and exhibitions, conventions, meetings, etc., and are thus classified as business events. On the other hand, marketing events are included as well, i.e., the players produce brand events, product presentations and employee events.

Leisure-oriented events include cultural (e.g., theater, opera, readings, etc.) and music events (concerts, tours, festivals, music clubs), sports events, private and social celebrations, and markets and funfairs.

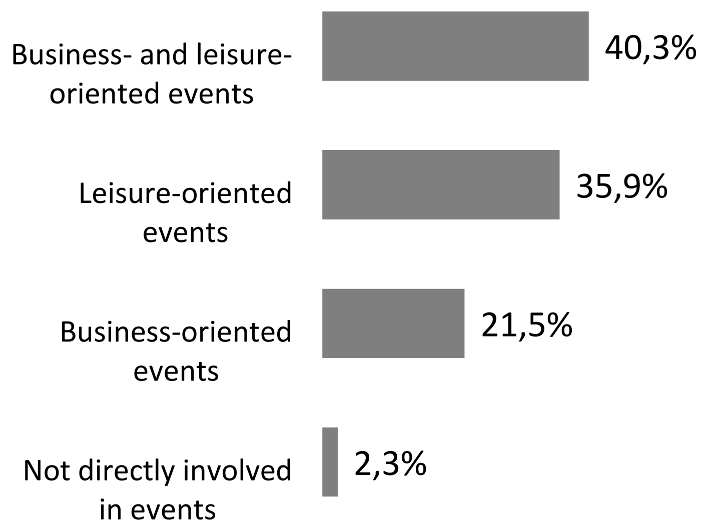
More than a third of respondents said they work exclusively for recreational events. This is particularly pronounced in the subsectors of event organizers, entertainment, and artists' agents/management. For example, the study shows that organizers of concerts, tours and festivals as well as artists' agents/management naturally work in these leisure-oriented areas. The same applies to artists (musicians, singers, actors or bands/DJs).

In contrast, agencies in particular often work exclusively in the field of business-oriented events. Trade shows, exhibitions and brand experience events are important fields of activity in which a large proportion of revenues are generated.

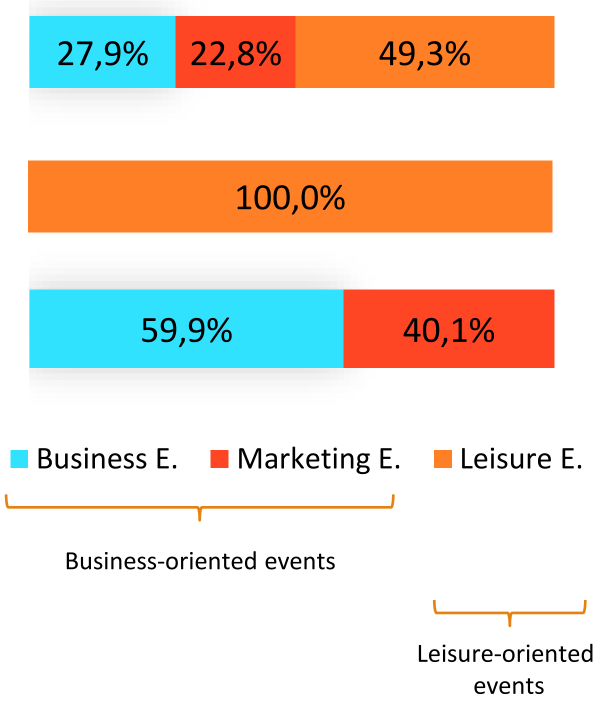
Event subsectors of the players

Event areas – General overview

Percentage of the event subsectors



Share of sales in percent in the event subsectors



Approximately 40 percent of the players in the event industry are active in both business- and leisure-oriented events, and can thus be considered "generalists" in the event industry. Roughly half of their sales are generated in the business and half in the leisure sector.

A good third of the players are active exclusively in the field of leisure-oriented events, generating 100 percent of their sales in this area.

Every fifth player works exclusively for business-oriented events. They generate just under 60 percent of their revenue from business events, while 40 percent is generated by marketing events.

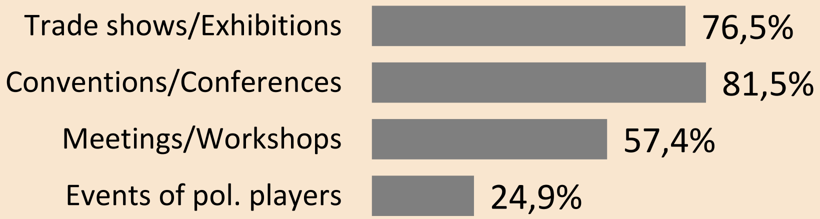
A small proportion of the companies surveyed are not active in events themselves. This applies to manufacturers, for example.

Event subsectors of the players

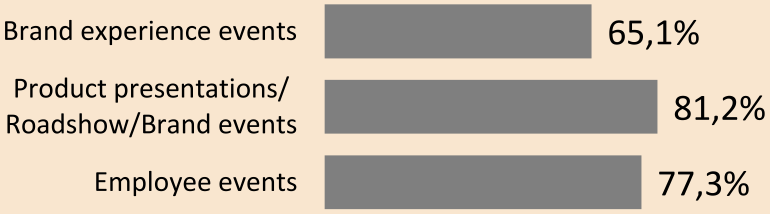
Event subsectors – General overview

Business-oriented

Business events
(multiple responses)

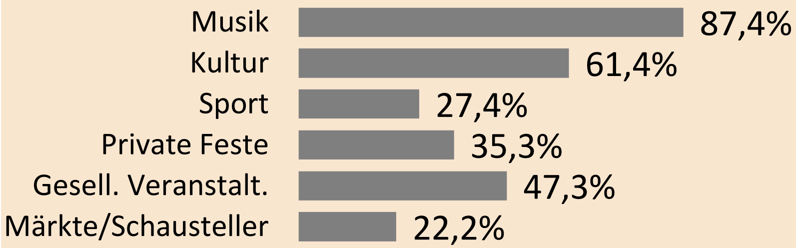


Marketing events
(multiple responses)



Leisure-oriented

Leisure events
(multiple responses)



The overview shows types of events associated with business- or leisure-oriented events.

For example, players active in the field of business events work in particular for trade shows/exhibitions (76.5%) as well as for conventions and conferences (81.5%).

Marketing events, on the other hand, are dominated by product presentations/roadshows, brand events (81.2%) and employee events (77.3%).

In the leisure events segment, music (e.g. concerts, festivals, tours, music clubs) dominates with 87.4%, followed by cultural events (e.g. theater, opera, readings and the like) with 61.4%.

Activity profiles of the players

Foci of activity and interdependencies in other areas of activity

The following charts provide a detailed look at the main activities of the clusters identified in the study. They are to be understood as an illustration of the activity profiles of the clusters and show a very clear activity focus in relation to the players.

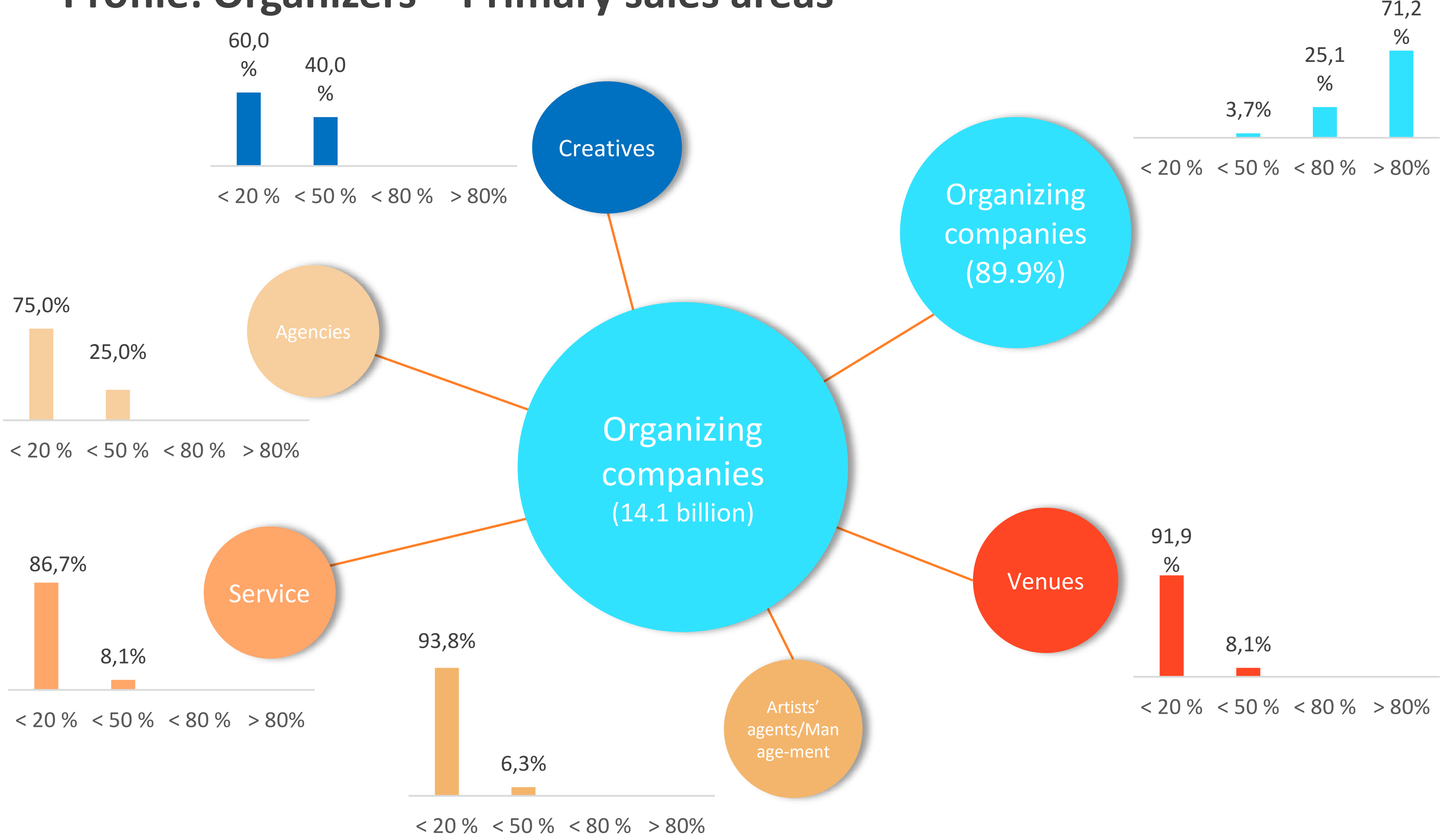
For the 10 identified clusters of the event industry, this confirms above all the clear demarcation in the fields of activity. At the same time, however, the broad range of activities is also apparent, which clearly shows the industry's interdependencies. The range of activities is clearly shown by the areas in which the players generate sales in addition to their focus of activity.

In addition to the activity focus (primary sales area), up to five other important sales areas of great significance to the players in the cluster are indicated in the charts. These vary individually, in some cases considerably. As a result, the individual shares of sales in other fields of activity may be relatively high (e.g., 20 %), but appear low when viewed across all players in this cluster. For this reason, the sales shares for these areas are not shown in relation to the cluster as a whole. Instead, the individual sales shares of those who actually work in this field of activity are given (frequency distribution in the bar chart).

In addition, the charts show the overall contribution of the cluster to industry sales in the event industry.

Activity profiles of the players

Profile: Organizers – Primary sales areas*



The organizing companies' broad field of activity is reflected in the areas in which the players generate sales.

On average, around 90 percent of sales are generated as organizing companies. Over 70 percent of organizing companies generate more than 80 percent of their revenues in this field.

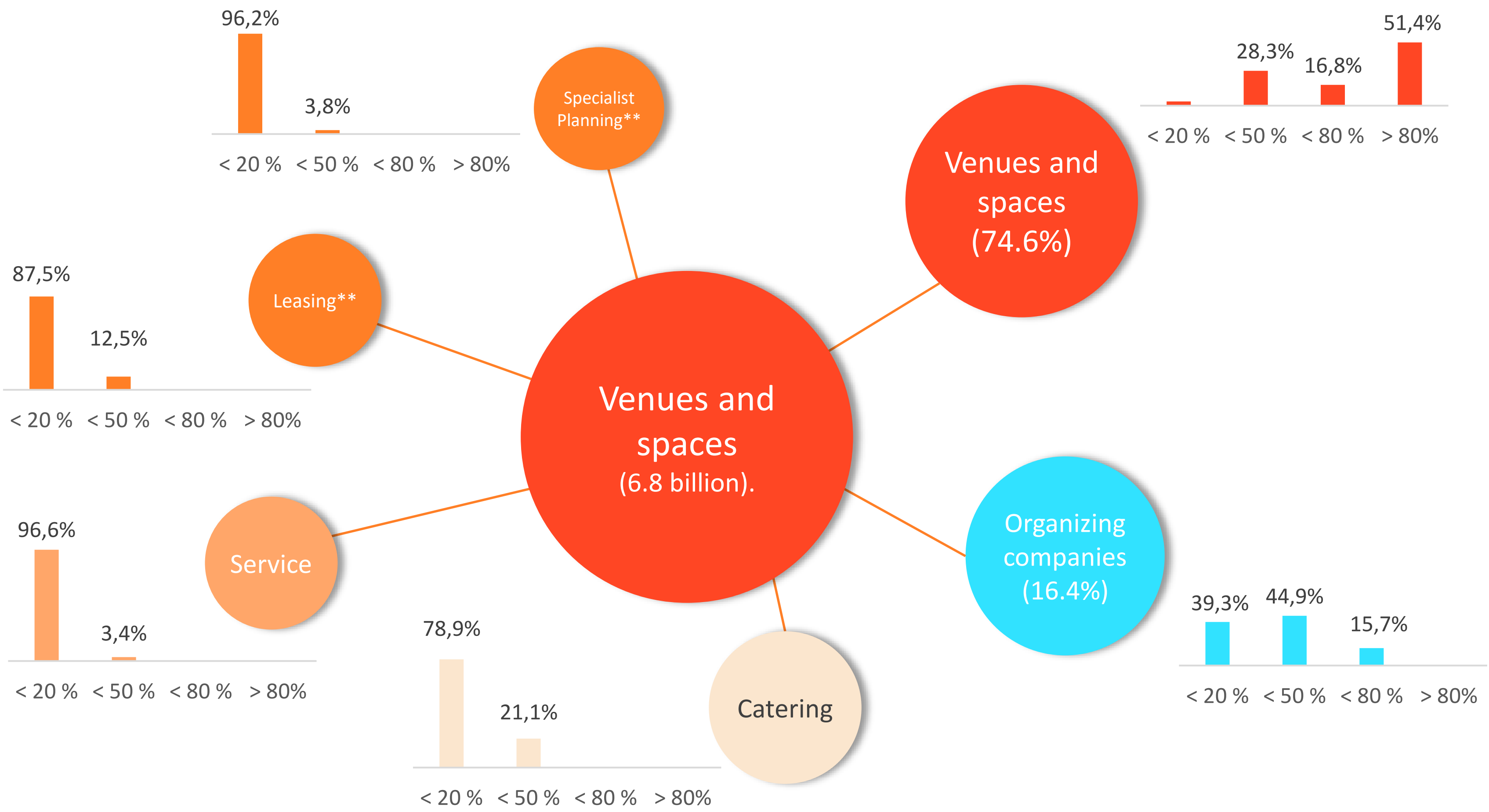
The overview shows five other primary sales areas for organizing companies.

According to this, event organizers often also generate sales in the areas of venues, artists' agents and management, and services (e.g. personnel and security services). Activities in the agency and creatives subsectors are often equally relevant. However, these shares of sales usually remain below 20 percent.

*) Please note that the activity profiles vary greatly from one individual to another, so we have not provided sales shares for individual sales areas.

Activity profiles of the players

Profile: Venues and spaces – Primary sales areas*



Venue operators generate three quarters of their sales from their venues and spaces (74.6%). More than half of them generate over 80 percent of their sales in this area.

However, in the venue subsector it is also clear that there is substantial overlap between venue operators and event organizers. This is reflected in the fact that 16.4 percent of sales are generated as organizing companies. One in six venue operators even generates up to 80 percent of its sales in this area.

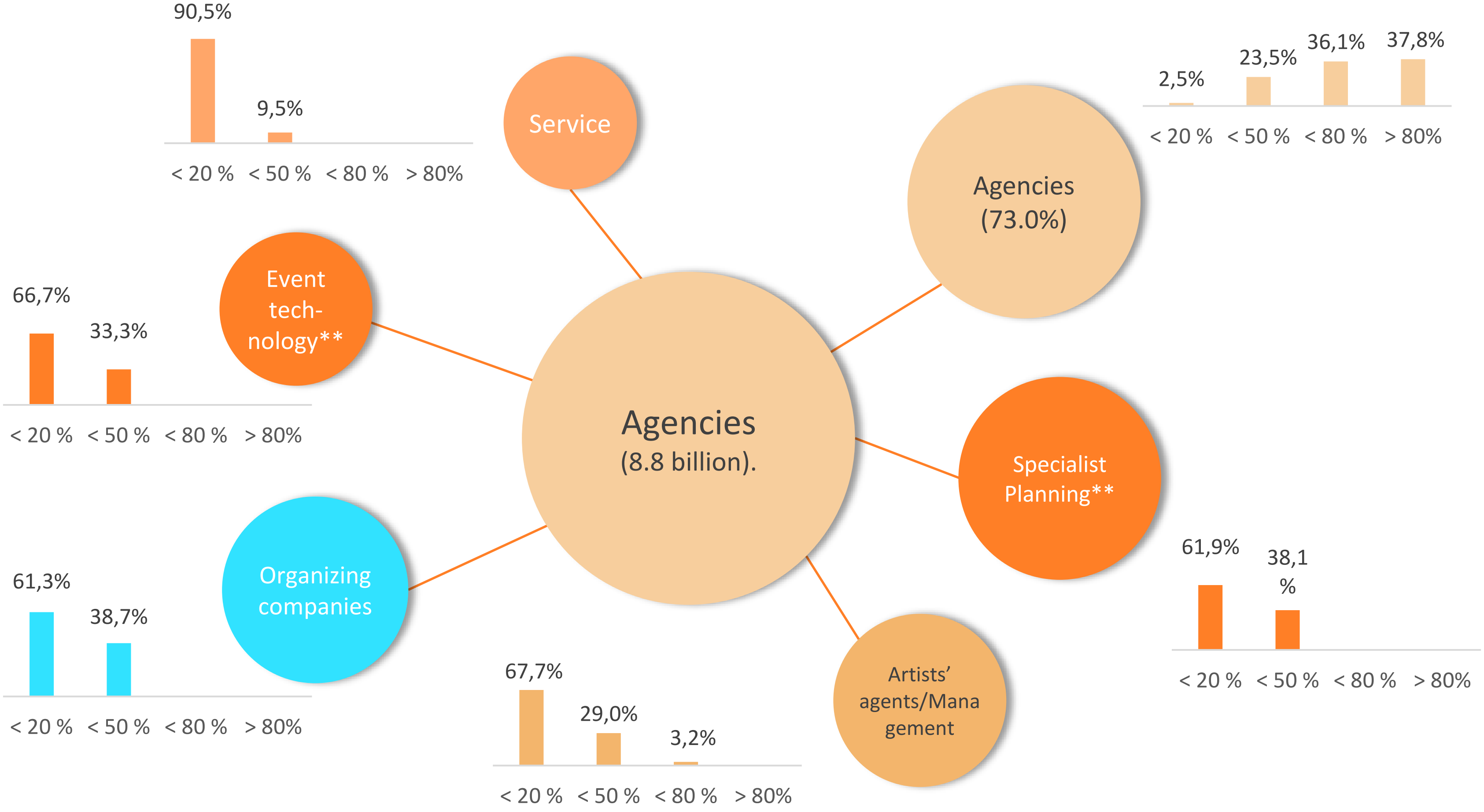
Moreover, there are interlinkages with other areas of activity. For example, catering, technology/equipment leasing, personnel/security services and specialist planning (e.g. event planning) play important roles for individual venue operators.

*) Please note that the activity profiles vary greatly from one individual to another, so we have not provided sales shares for individual sales areas.

) Specialist planning as well as leasing are subsegments of the **trade show construction and event technology cluster and are part of the service provider subsector.

Activity profiles of the players

Profile: Service providers – Agencies – Primary sales areas*



As expected, agencies generate nearly three-quarters of their sales (73%) from essential agency work.

However, agencies have also opened up other sales channels. The most significant areas of activity with regard to sales are specialist planning, artists' agents/management and independent activities as event organizers.

But agencies also provide technical services as well as other services. This must be viewed primarily in the context of the increasing full-service offerings of agencies.

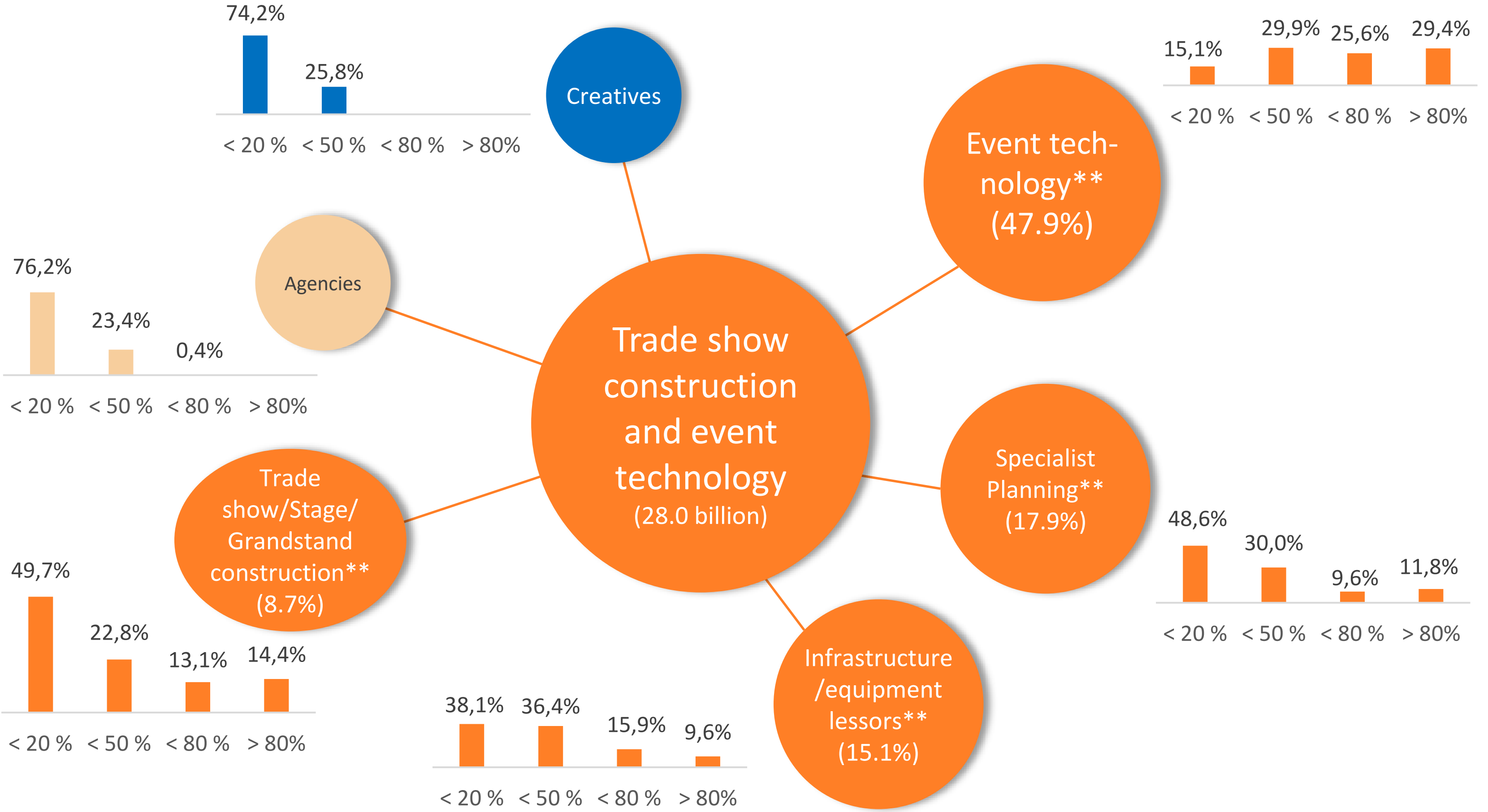
Almost half of the agencies stated event agency (43.1%) as their core focus of activity. One quarter are agencies for live communication, and just under 10 percent are management consultancies.

*) Please note that the activity profiles vary greatly from one individual to another, so we have not provided sales shares for individual sales areas.

) Specialist planning and technology are subsegments of the **trade show construction and event technology cluster and are part of the service provider subsector.

Activity profiles of the players

Profile: Service providers – Trade show construction and technology – Primary sales areas*



The trade show construction and technology cluster includes several technically oriented sales areas.

In the trade show construction and technology subsector, the technology subsegment represents the primary sales area with 47.9%. Moreover, (technical) specialist planning (17.9%), infrastructure and equipment leasing (15.1%) as well as trade show, stage and grandstand/bleacher construction (8.7%) are also important sales areas.

To a lesser extent, companies in this service subsector also provide agency services as well as services from creative professionals.

Since the trade show construction and technology cluster is very diverse, the following overview differentiates important fields of activity in greater detail.

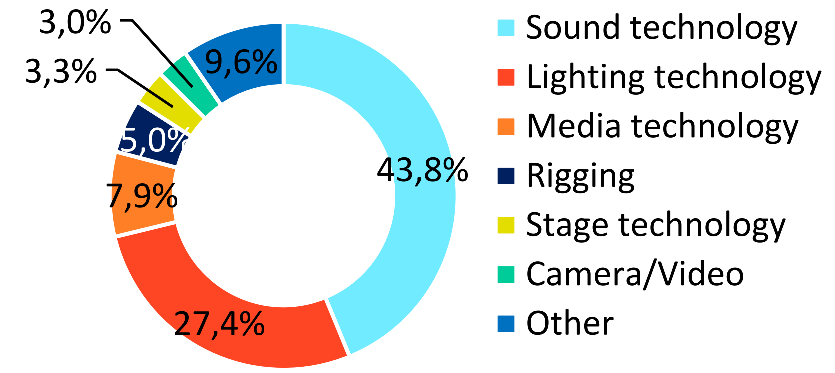
*) Please note that the activity profiles vary greatly from one individual to another, So we have not provided sales shares for individual sales areas outside of subsegments of the trade show construction and technology cluster.

) Technology, specialist planning, lessors and trade show stand, stage and grandstand/bleacher construction are subsegments of the **trade show construction and event technology cluster and are part of the service provider subsector.

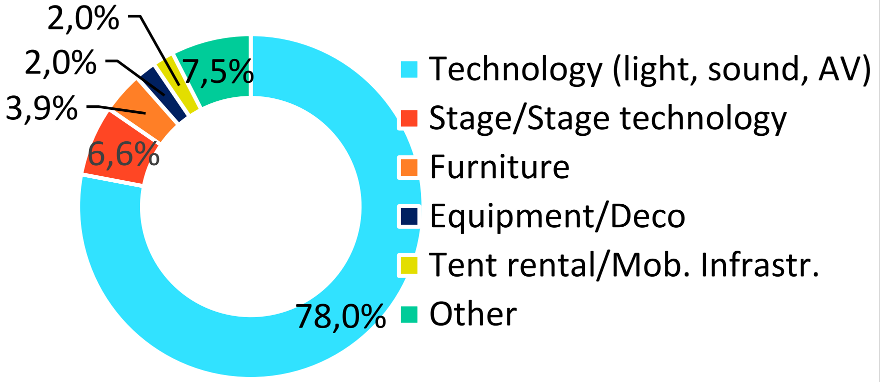
Activity profiles of the players

Profile: Service providers – Trade show construction and technology – Foci of activity of the players

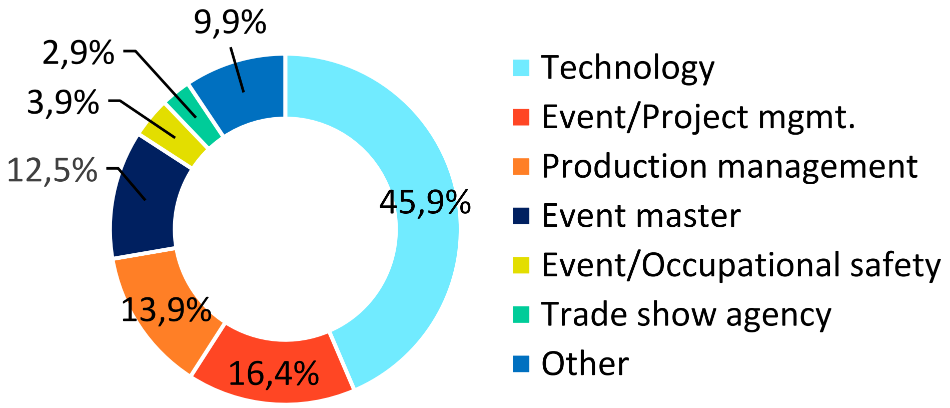
Event technology



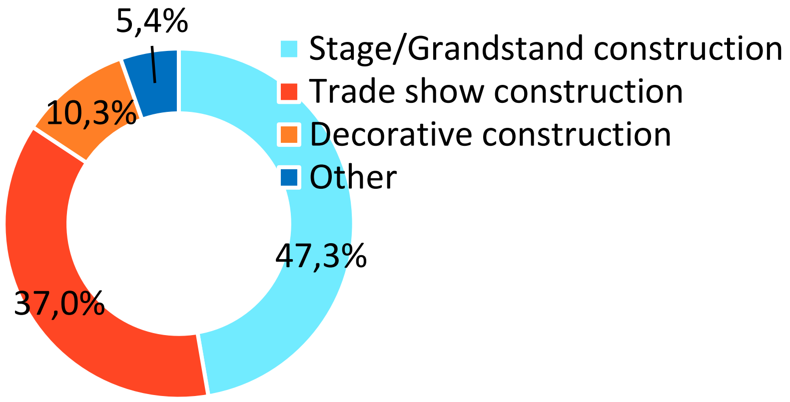
Infrastructure and equipment leasing



Specialist Planners



Trade show/Stage/Grandstand construction



The fields of activity in the event technology subsector are very diverse. Although the respondents often work in several areas, we asked the actors to indicate their main area of activity.

Thus, the majority of actors in the field of event technology work in sound technology (43.8%) and lighting technology (27.4%).

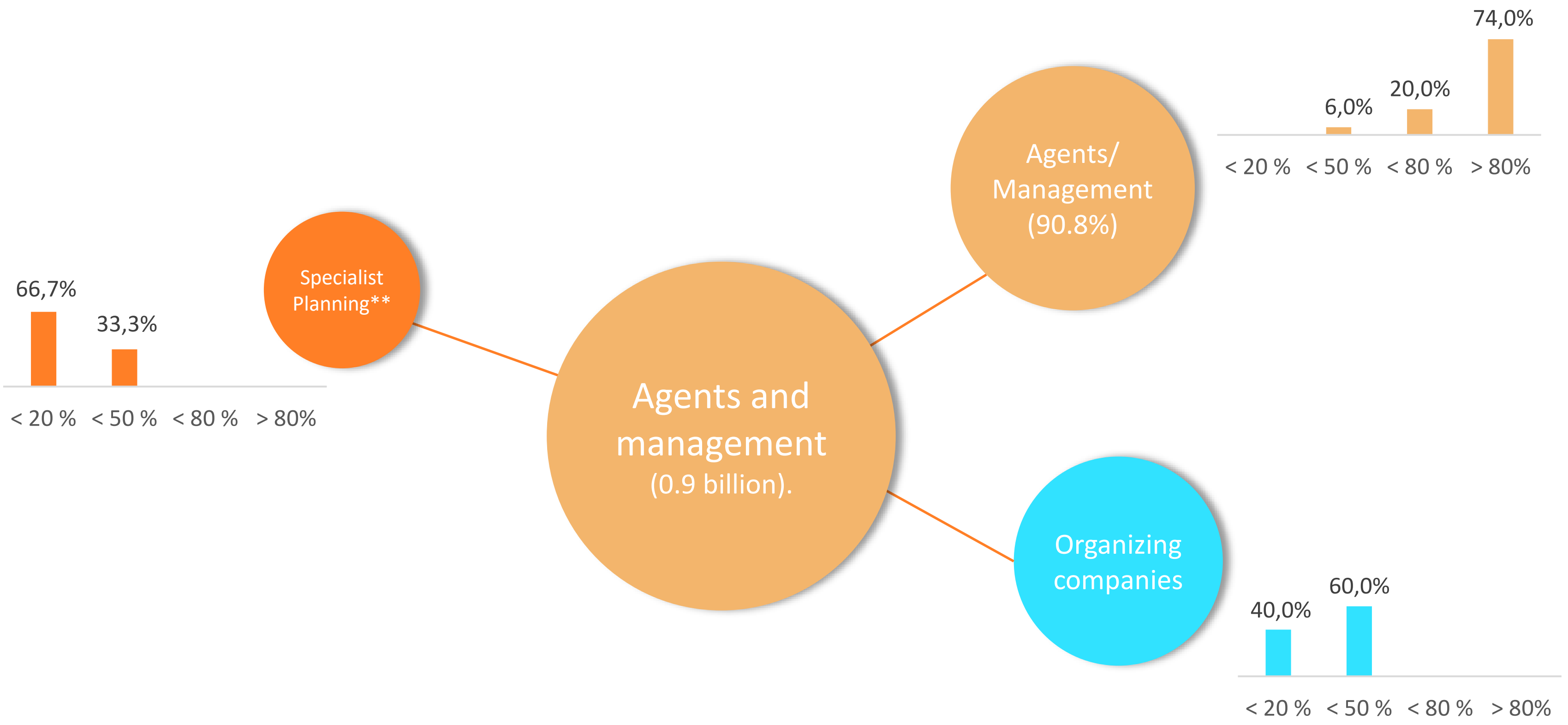
Specialist planners are particularly active in technical planning. Other important fields include event, project and production management.

Infrastructure/equipment lessors frequently focus on lighting, sound and AV.

Almost half of the players in the trade show stand, stage and grandstand/bleacher construction segment work in stage and grandstand construction and a good third in trade show stand construction.

Activity profiles of the players

Profile: Service providers – Artists' agents and management – Primary sales areas*



The majority (90.8%) of the players active in the field of artists' agents and management specialize in this activity and generate their sales in this area.

However, some of the players also function as organizing companies. Sixty percent of the artists' agents who work directly as organizing companies generate up to 50 percent of their total sales in this segment.

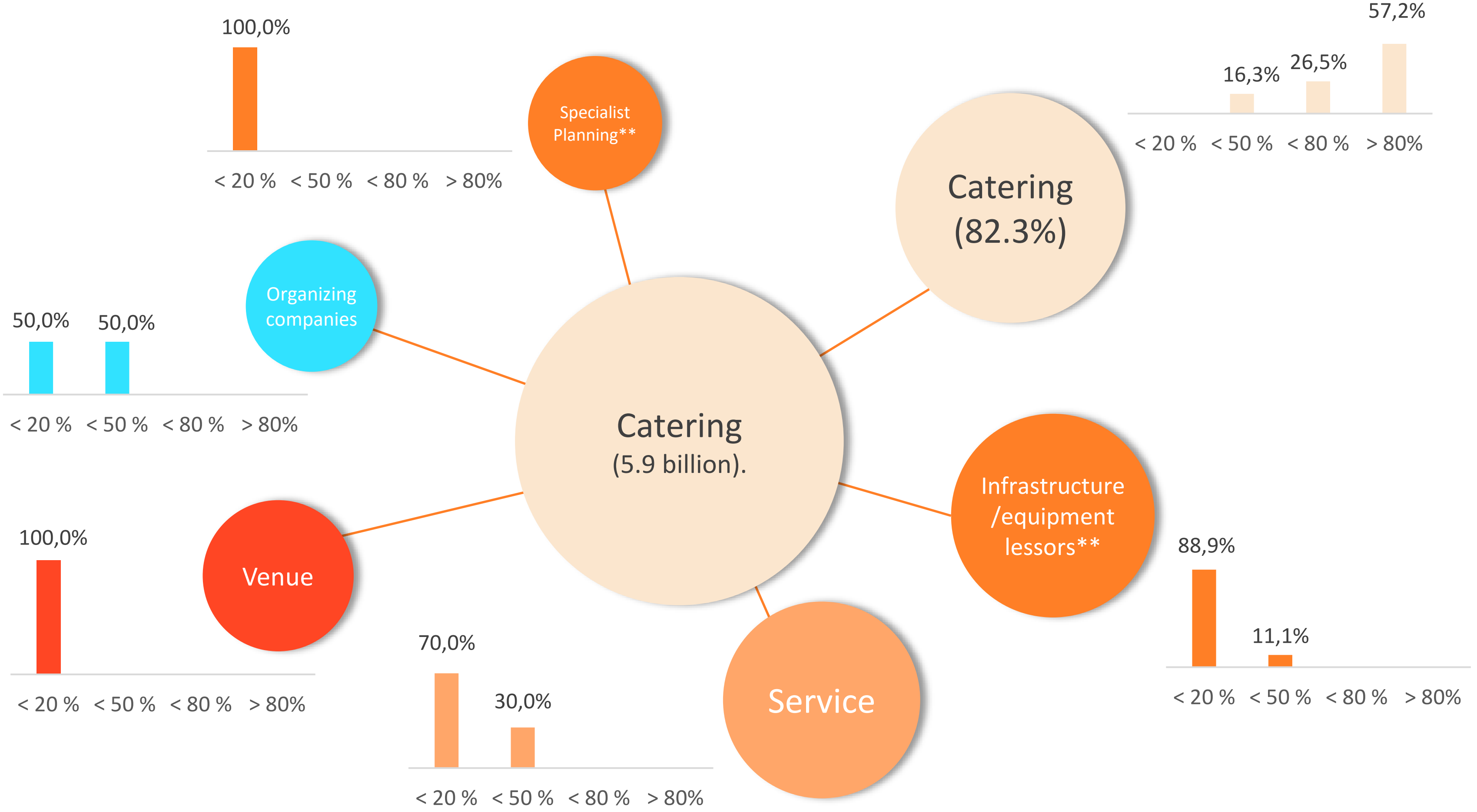
To a lesser extent, agents also work as specialist planners. This applies primarily to the areas of event and project management.

*) Please note that the activity profiles vary greatly from one individual to another, so we have not provided sales shares for individual sales areas.

) Specialist planning is a subsegment of the **trade show construction and event technology cluster and is part of the service provider subsector.

Activity profiles of the players

Profile: Service providers – Catering – Primary sales areas*



In the catering subsector, the companies generate 82.3% of their sales in this core business. More than half generate over 80% of their sales in this area.

However, caterers are also particularly active in the areas of infrastructure and equipment leasing and in the service sector. This is not surprising, since the rental of equipment (e.g., tableware) and the provision of service personnel are important subsegments of catering.

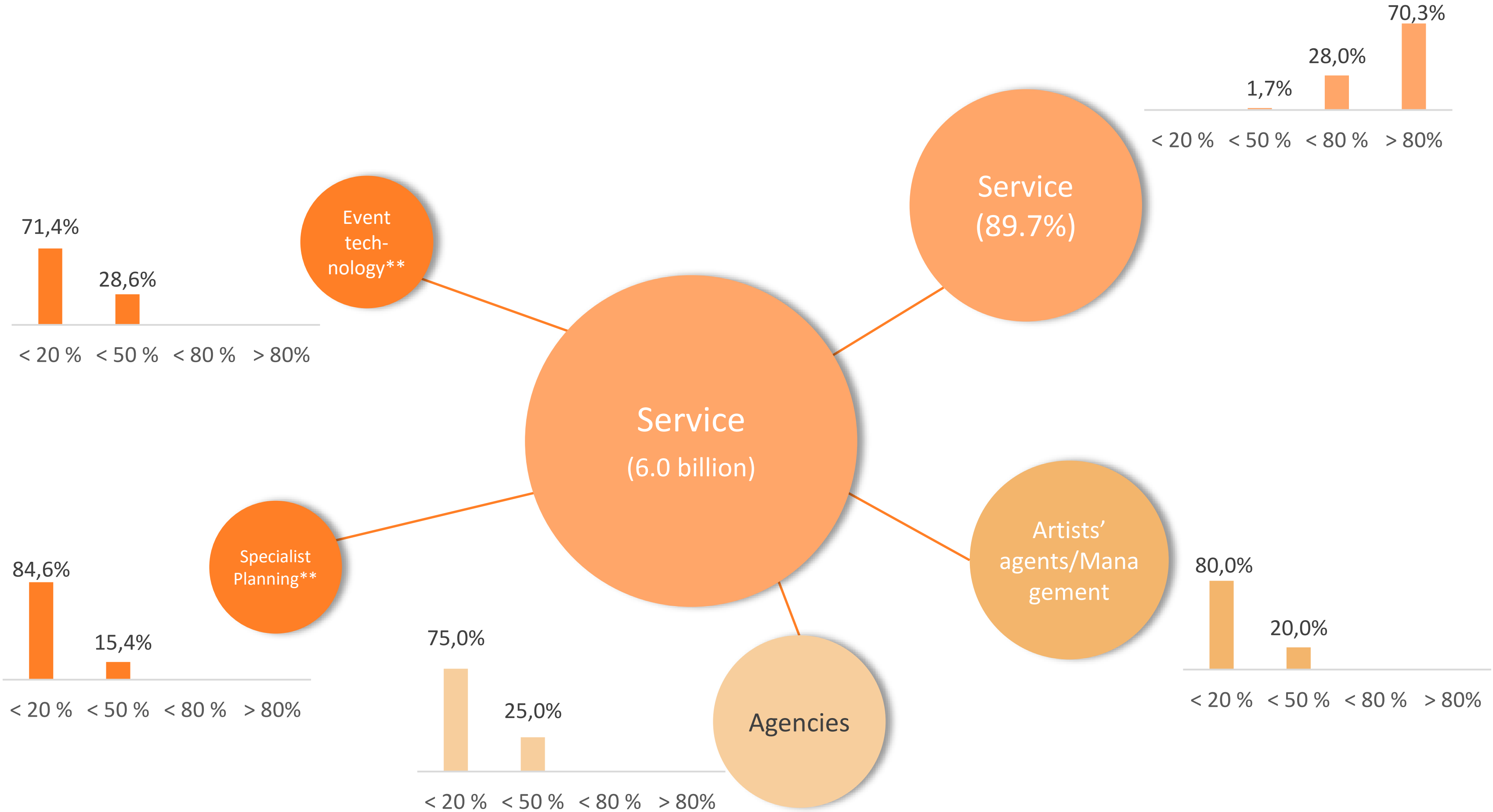
In addition, lower shares of sales are generated in value creation processes as event organizers, specialist planners or venue operators.

*) Please note that the activity profiles vary greatly from one individual to another, so we have not provided sales shares for individual sales areas.

) Specialist planning and leasing are subsegments of the **trade show construction and event technology cluster and are part of the service provider subsector.

Activity profiles of the players

Profile: Service providers – Service – Primary sales areas*



Service companies work in a focused manner and generate almost 90% of their sales in this area. Over 70 percent generate more than 80 percent of their sales here.

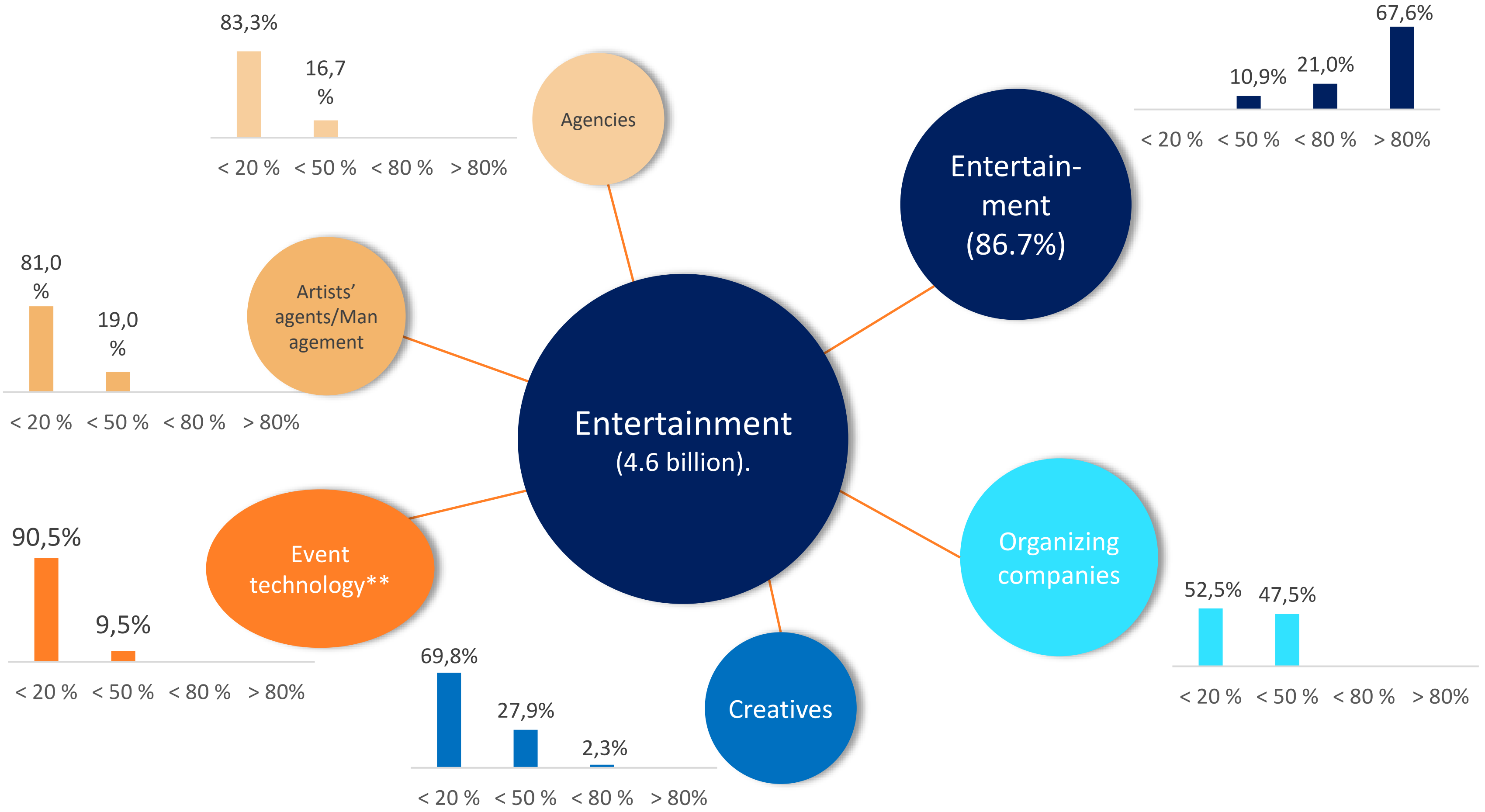
They engage in other areas of activity such as those of artists' agents and management or provide planning, technical and agency services. This, too, should be viewed in the context of a full-service offering.

*) Please note that the activity profiles vary greatly from one individual to another, so we have not provided sales shares for individual sales areas.

) Specialist planning and technology are subsegments of the **trade show construction and event technology cluster and are part of the service provider subsector.

Activity profiles of the players

Profile: Entertainment and creatives – Entertainment – Primary sales areas*



Sales generation in the entertainment subsector is largely concentrated on this core business (86.7%). Two thirds of the players generate more than 80 percent of their sales here.

Moreover, a large proportion of companies, freelancers and self-employed individuals in this sector also operate as event organizers. Almost half of them generate up to 50 percent of their sales in this area.

However, the players also generate further sales from creative, technical or agency services as well as from acting as artists' agents and management.

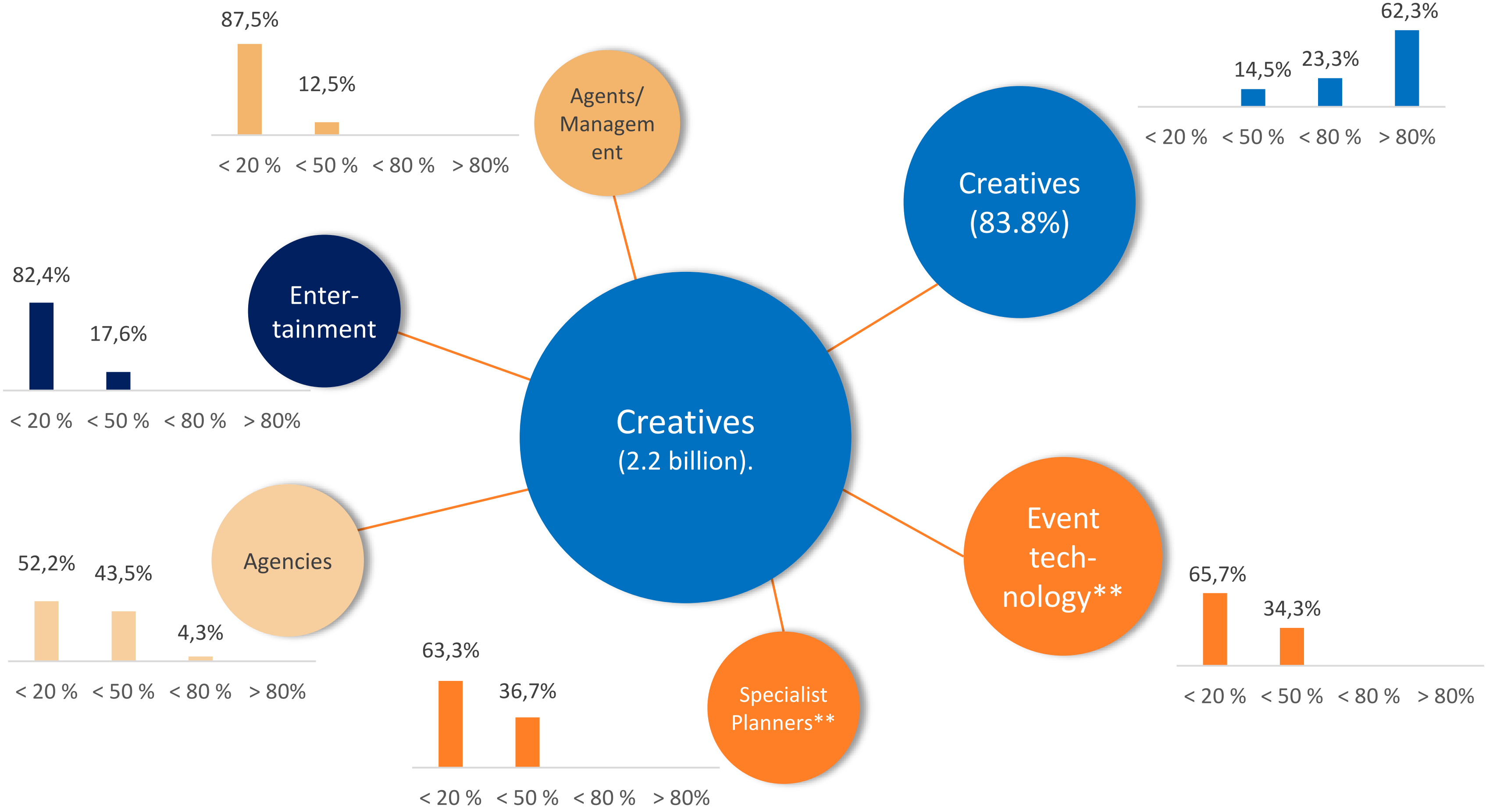
More than a third of the players in the entertainment sector stated that their main activity was working as a musician (36.2%), band/DJ (21.1%) and one in ten as singers or market traders/showmen.

*) Please note that the activity profiles vary greatly from one individual to another, so we have not provided sales shares for individual sales areas.

) Technology is a subsegment of the **trade show construction and event technology cluster and is part of the service provider subsector.

Activity profiles of the players

Profile: Entertainment and creatives – Creatives – Primary sales areas*



Creatives generate 83.8 percent of their sales in this area. Nearly two-thirds of them generate more than 80 percent with creative services (e.g. lighting/sound design, design, design work).

Individually, the technology area represents an additionally important share of sales, highlighting the technical-creative services for this cluster in particular. For example, lighting/sound designers work in this subsegment. Some of the players are active as artists/entertainers themselves (e.g. DJs).

This area also includes specialist planning services. Production management and technical planning/implementation, which are provided as services, are particularly relevant.

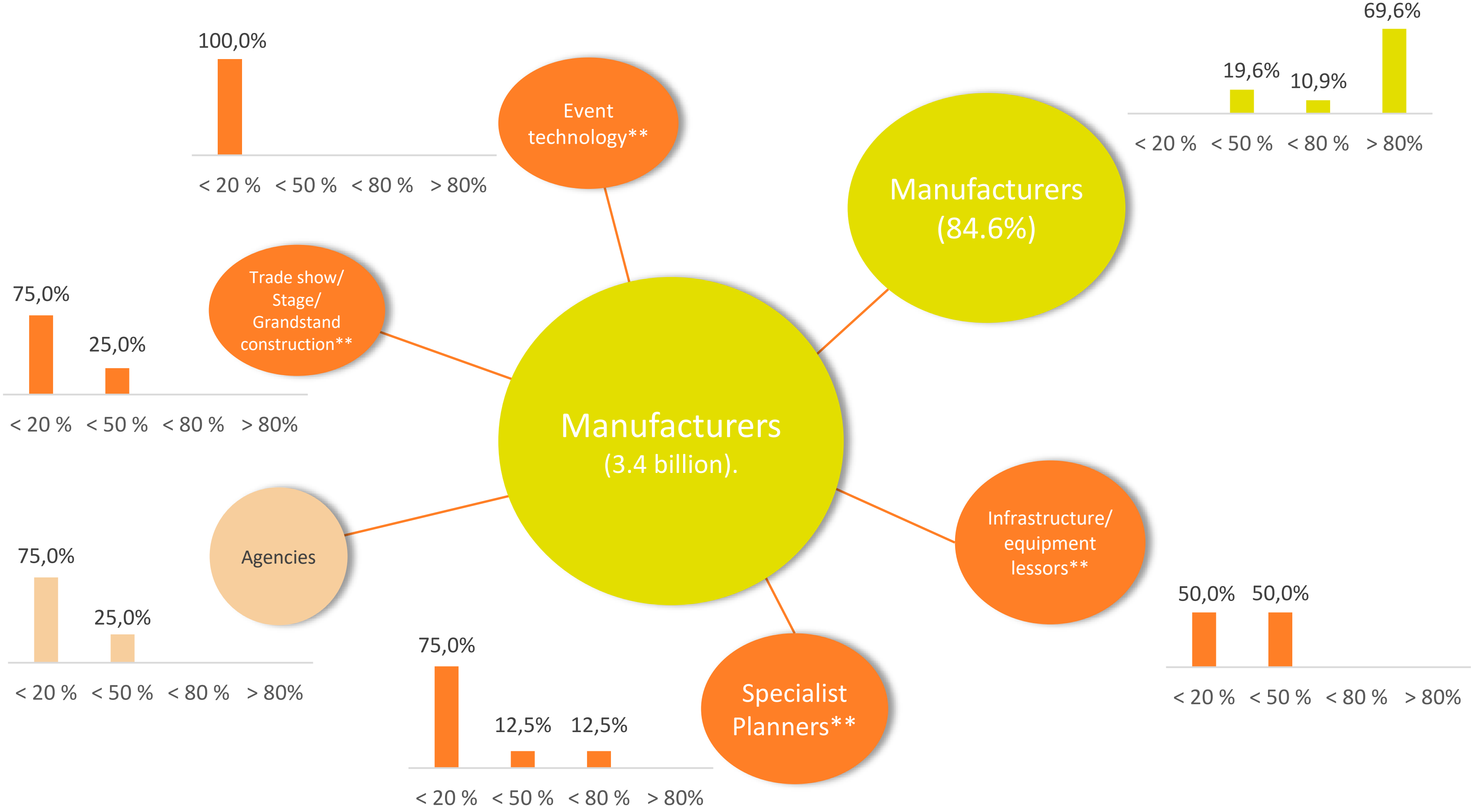
Likewise, creative services from event agencies, graphics/communication agencies or designers can also be provided here.

*) Please note that the activity profiles vary greatly from one individual to another, so we have not provided sales shares for individual sales areas.

) Technology and specialist planning are subsegments of the **trade show construction and technology cluster and are part of the service provider subsector.

Activity profiles of the players

Profile: Manufacturers – Primary sales areas* (small number of cases)



Manufacturers of products for the event industry generate nearly 85 percent of their sales in this field of activity.

However, there are numerous interconnections with other areas of activity in the event industry. This applies to fields such as leasing (of technology), the provision of specialist planning services and agency services.

Trade show and stage construction as well as on-site technical implementation also account for smaller shares of sales.

*) Please note that the activity profiles vary greatly from one individual to another, so we have not provided sales shares for individual sales areas.

) Leasing companies, specialist planning, trade show/stage/grandstand/bleacher construction and technology are subsegments of the **trade show construction and event technology cluster and are part of the service provider subsector.

(5) Working in the value creation network (general overview)

Work in the value creation network

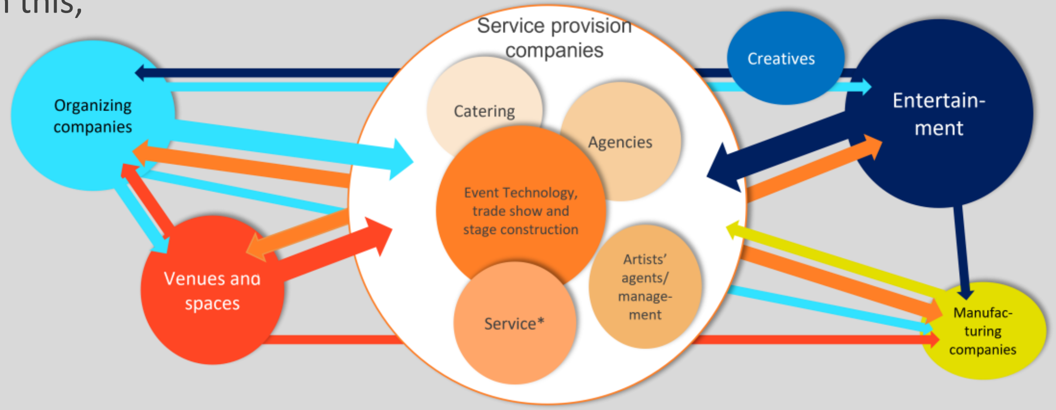
Value creation partners of the players at a glance

The aim of the study is to identify important value creation partners of the players in the event industry and to depict them in a structured manner. This process revealed that the interrelationships within the industry are very diverse. The study initially focuses on the immediate core area of the event industry. Starting with organizing companies and venue operators as well as companies and private individuals, who often act as organizers or clients at the beginning of event planning, service providers work directly with these clients in the realization and implementation of events. They act as technical, creative or service-oriented players.

For the analysis of important value creation partners, the respondents initially indicated the clients and contractors that were most important to them. This information shows in particular the multi-layered networking within the industry.

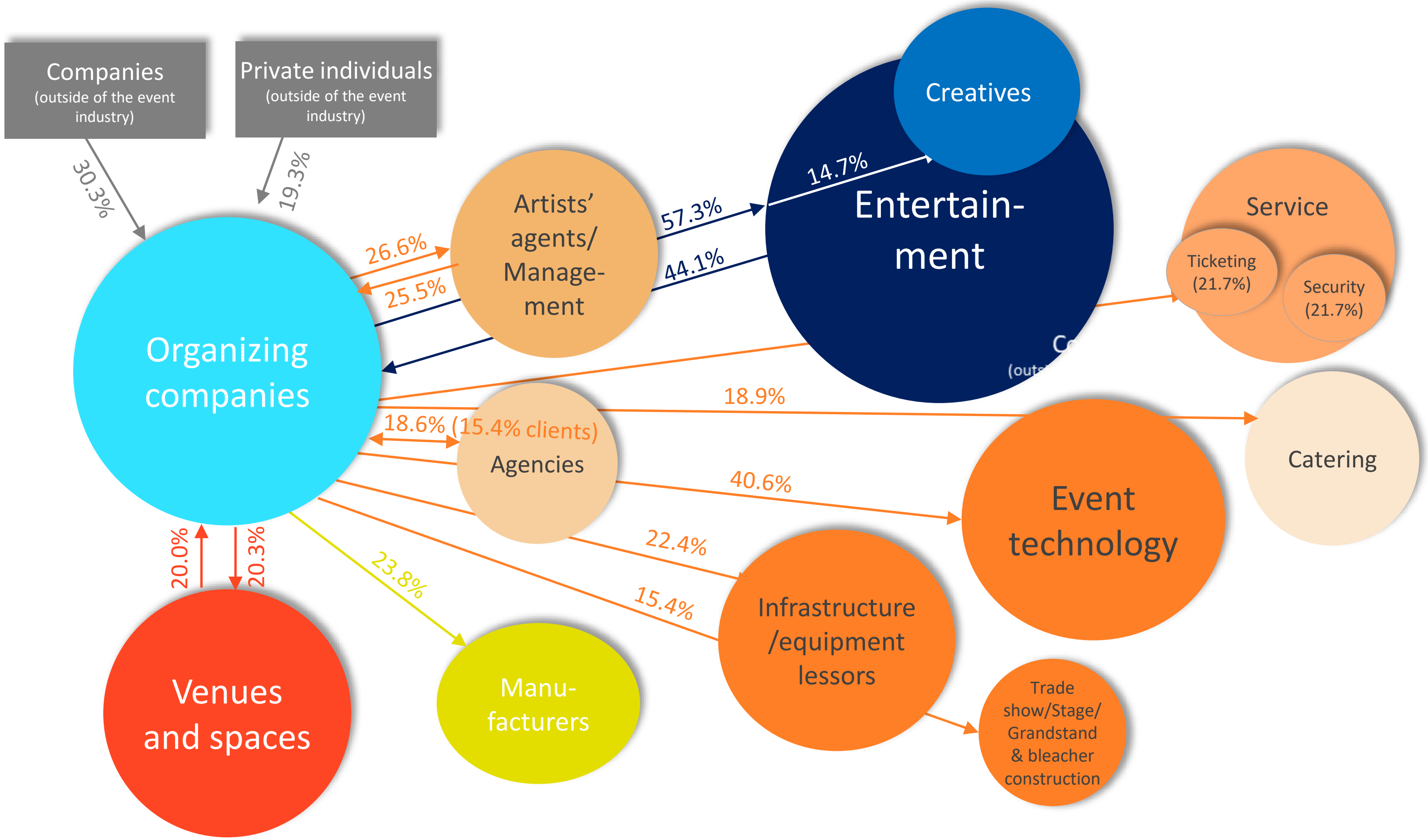
The following charts show the results individually for the five central areas of activity in the event industry (organizing companies, venue operators, service providers, entertainment/creative professionals, and manufacturers). Based on this, an initially simplified network was created. However, it shows particularly relevant interrelationships for the central areas of activity. The adjacent diagram essentially visualizes the interconnections of the entire industry, but does not evaluate the relationships for the sake of clarity.

In contrast, the following individual illustrations for the five main clusters also show the significance of the relationships. The frequency with which up to five of a player's most important customers or contractors are named is shown.



Work in the value creation network

Important value creation partners – organizers



The key contractors of event organizers are found primarily in the entertainment subsector. According to 57.3% of the organizing companies surveyed, artists - especially musicians, singers, bands/DJs, actors or market traders and showmen - are important partners. On the other hand, these actors are also important clients for event organizers (44.1%).

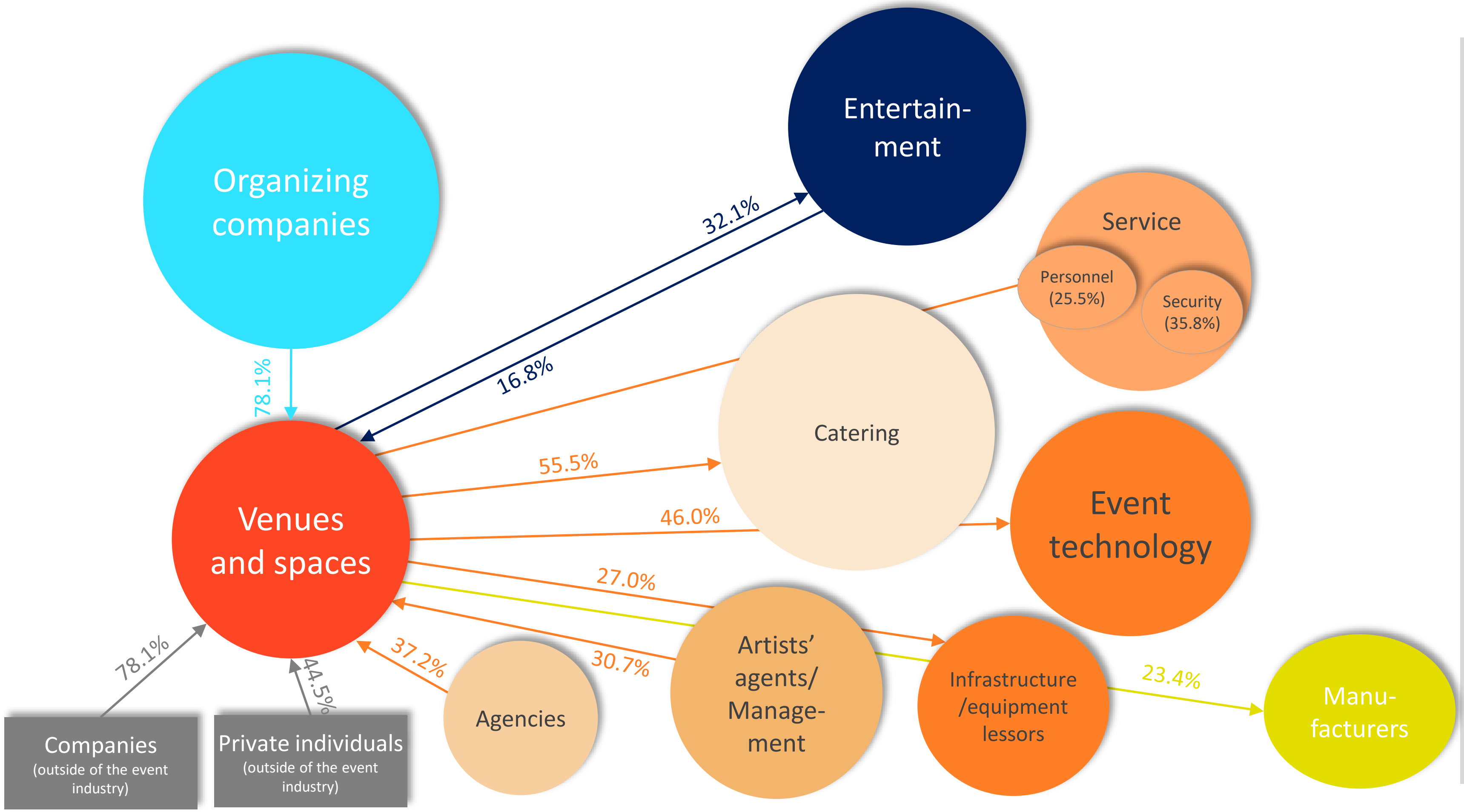
Other partners (in a reciprocal relationship) are found in artists' agents and management, venues and spaces, and agencies.

Further important contractors for organizing companies are the sub-sectors of event technology (40.6%), service (especially ticket service and security services with 21.7% each), leasing companies (22.4%) and catering (18.9%).

Manufacturers are also important direct customers of organizing companies, with 23.8% indicating this connection as relevant.

Work in the value creation network

Important value creation partners – venues and spaces



More than three quarters of the venue operators named event organizers as key clients. Over a third also named agencies as important clients.

In addition, catering (55.5%), even technology (46.0%), artists' agents and management (30.7%), as well as infrastructure and equipment leasing (27.0%) are considered important contractors in the value creation network.

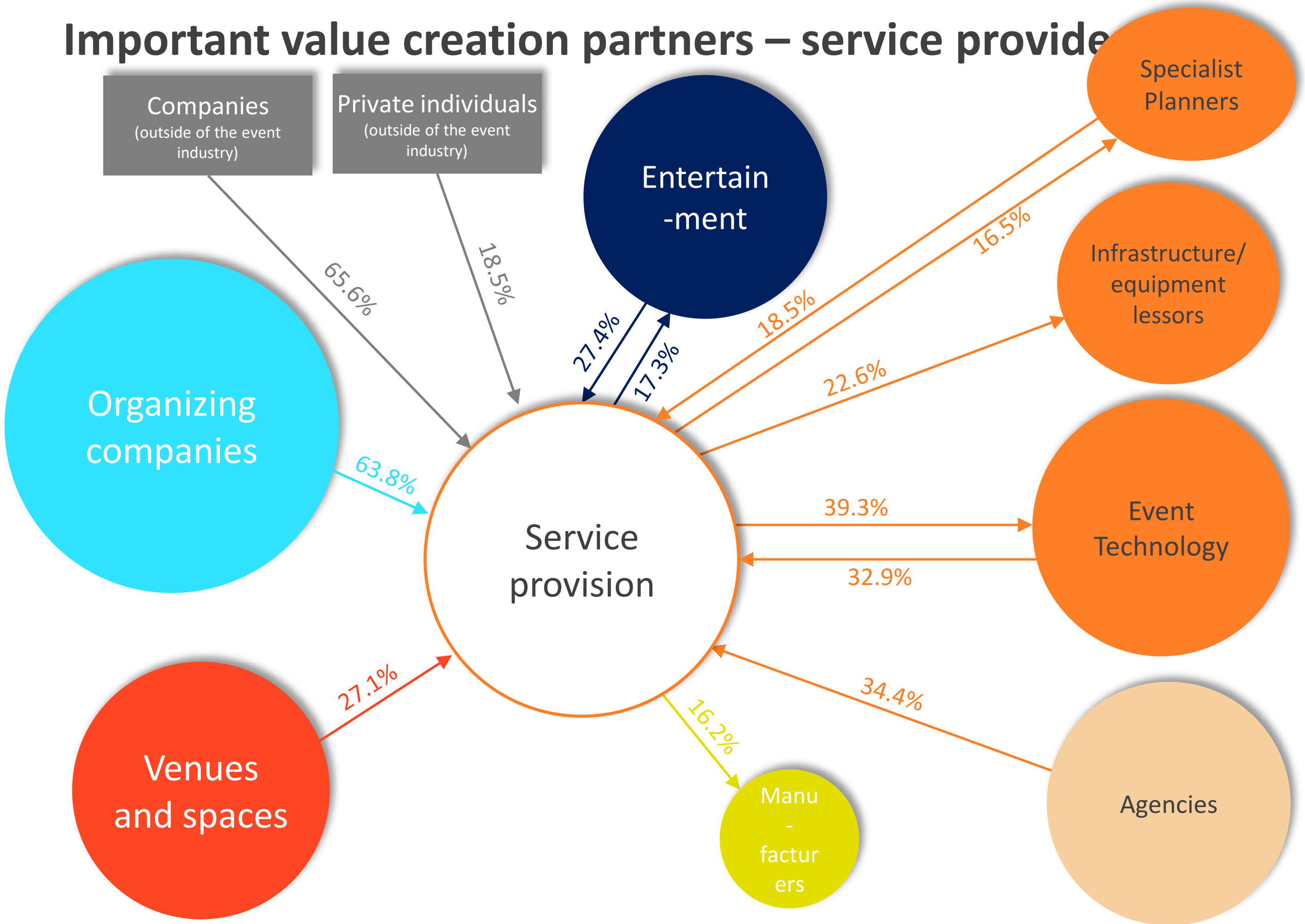
Likewise, service providers, in particular for personnel (25.5%) and security services (35.8%), are by nature key contractors for venue operators.

The same applies to the entertainment subsector – almost a third name artists as important contractors.

Companies and private individuals make a significant direct contribution to sales as well.

Work in the value creation network

Important value creation partners – service providers



The overview shows important interrelationships in the service provider subsector.

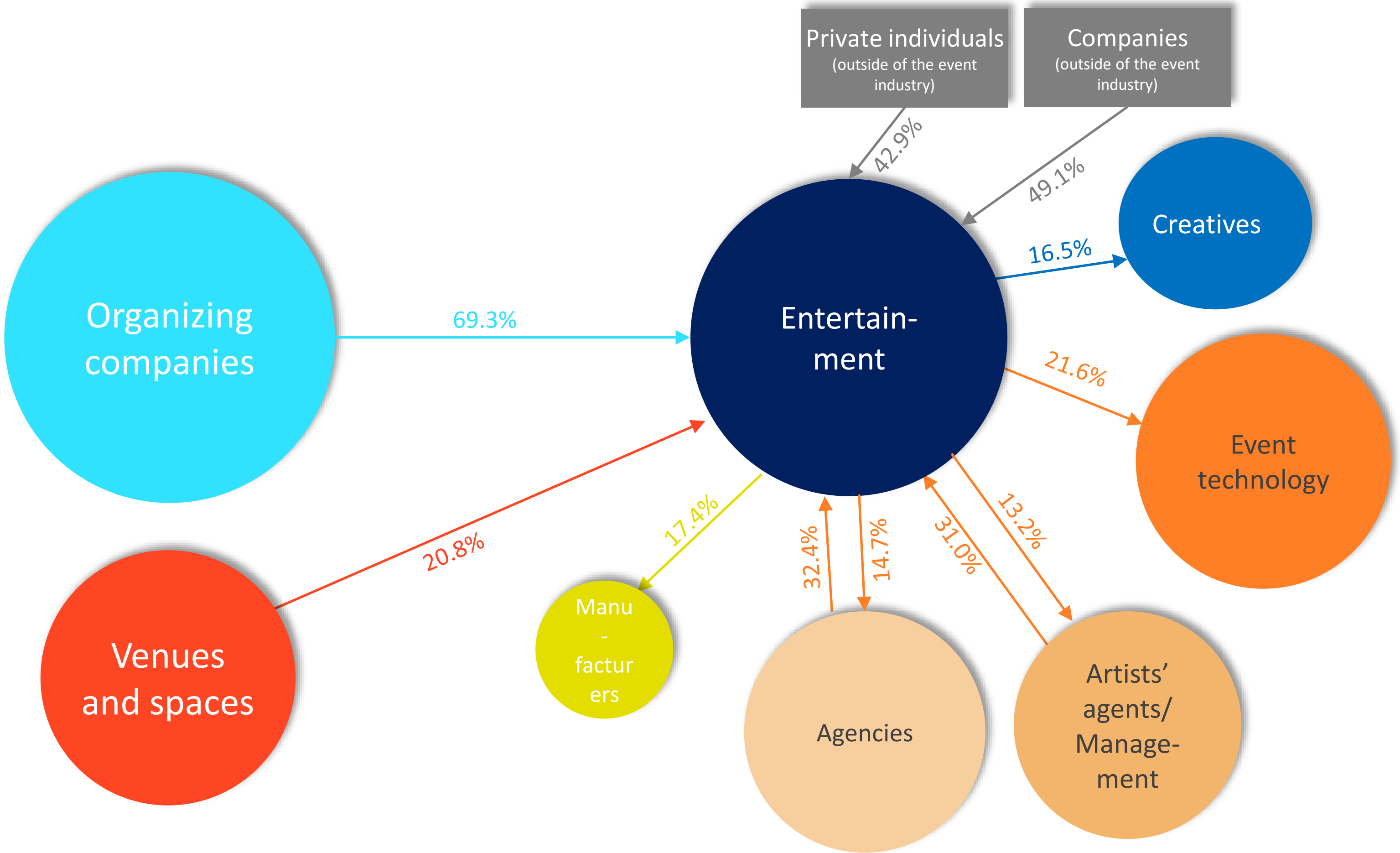
For two-thirds of the service providers, companies are key partners, both as direct clients and as organizers. The same applies to agencies. More than a third of the service providers named agencies as important clients.

In addition, the areas of event technology (reciprocally important relationship), lessors of infrastructure and equipment, and specialist planners (reciprocally) are relevant.

The entertainment cluster also shows important links with the service provider subsector. More than a quarter of the service providers named artists directly as relevant clients (27.4%).

Work in the value creation network

Important value creation partners – entertainment and creatives

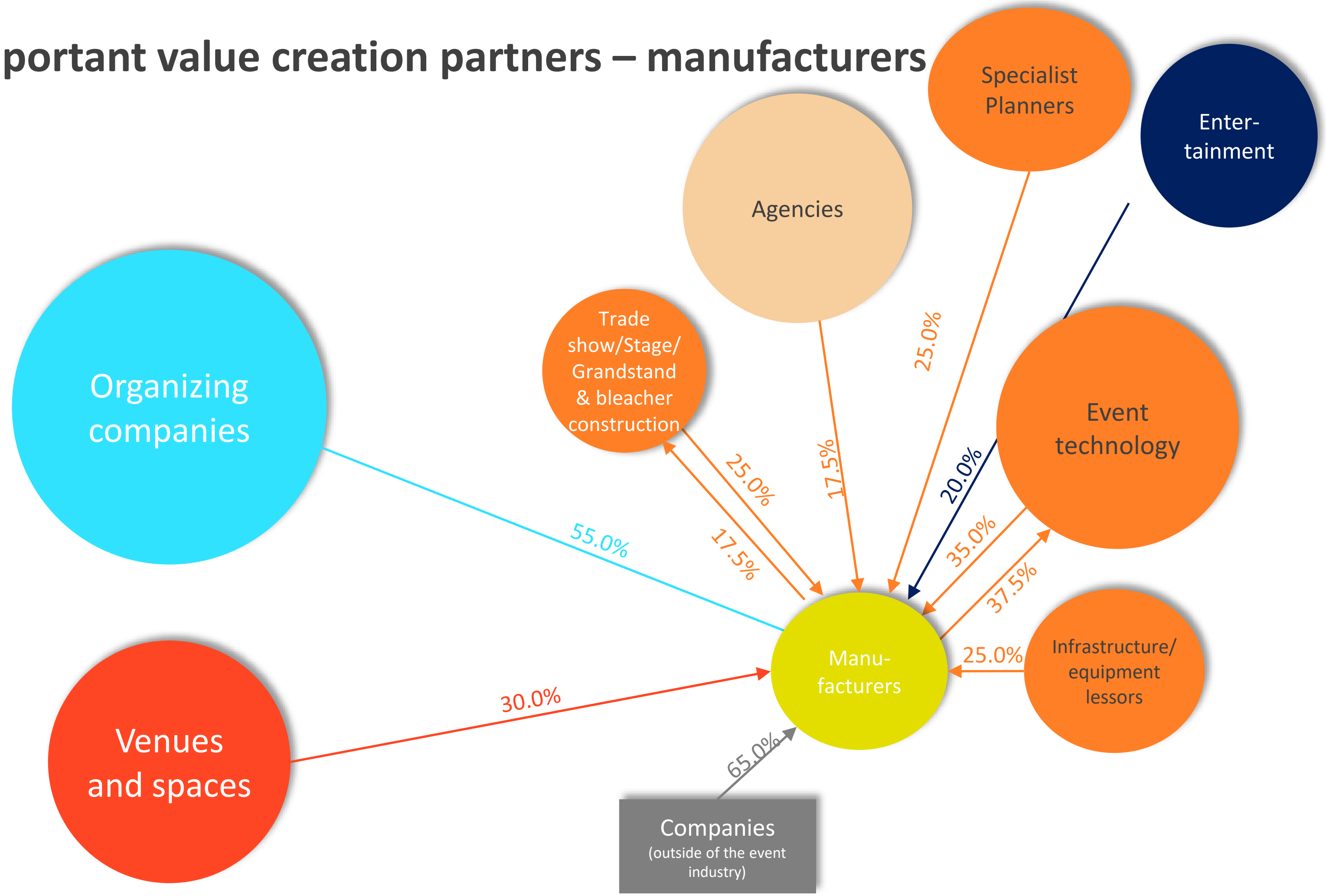


Looking at the entertainment subsector, one can see that more than two thirds of these professionals consider organizing companies important clients. The same applies to companies (49.1%), private individuals (42.9%), agencies (32.4%), and artists' agents and management (31.0%).

Important contractors, on the other hand, include event technology (21.6%), creatives (16.5%), manufacturers (17.4%), and agencies, as well as artists' agents and management.

Work in the value creation network

Important value creation partners – manufacturers



For manufacturers, organizing companies (55.0%) and venue operators (30.0%) are equally important clients. Companies as direct organizers of business-oriented events (e.g. employee/customer events) also play a very important role.

Reciprocal relationships with the event technology sector and the trade show, stage and grandstand/blecher construction subsector are particularly relevant.

Specialist planners (25.0%), infrastructure and equipment leasing companies (25.0%), and agencies (17.5%) form an important group in the value creation network as well.

The entertainment sector (20.0%) is also interesting for manufacturers as direct clients.

(6) The current situation and perspectives (General overview)

The current situation and perspectives

The impact of the COVID-19 pandemic on the event industry

It should be noted at the outset that the primary aim of this study, entitled "Veranstaltungslandkarte Deutschland" (Mapping the Event Industry in Germany), was not to examine how the event industry is affected by the COVID-19 pandemic and what its prospects are.

Nevertheless, several questions were asked in this regard, which provide some interesting insights due to the representativeness of the study for the event industry.

The average loss of sales in the 2020 pandemic year was 76.6% in the events industry. While only 2% of companies perceived no change, 17.8% of event industry respondents experienced a near-total loss of revenue due to the pandemic.

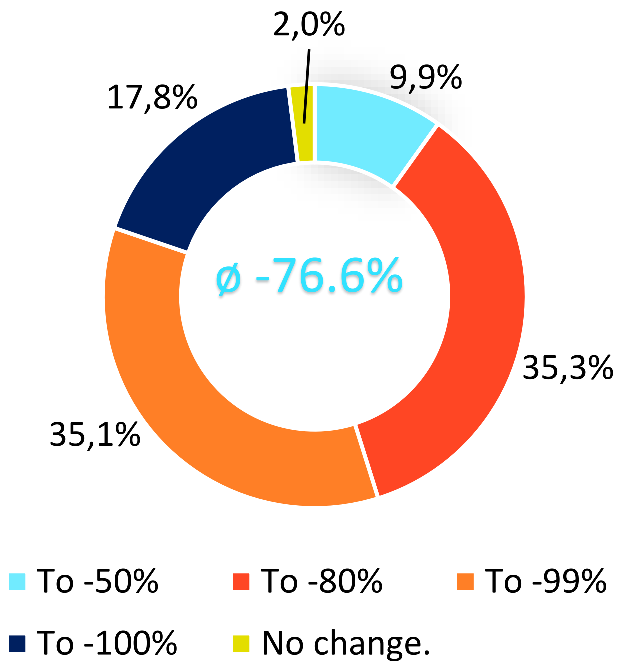
Moreover, 61.6% of the companies surveyed had no opportunities in 2020 to compensate for the resulting loss of revenue through other activities. By contrast, 32.5% of the companies were often very creative in their search for new areas of business. However, these efforts frequently only compensated for less than a third of the losses. For example, artists and creatives switched to education or other formats, some of which were digital (e.g., online teaching). For creatives in particular, there were numerous opportunities in film/TV, photography, graphic design or in developing digital formats. Service providers and service companies took on other activities in construction, logistics or care. Agencies very often developed new offerings in digital and hybrid formats. Other communication tools such as advertising and consulting and coaching services were also important areas of activity. Organizing companies and venue operators, on the other hand, were able to generate sales in part by setting up training and examination rooms or testing and vaccination centers.

The mood in the industry as a whole is cautiously optimistic: 72.7% of the companies do not expect their own area of activity to return to the level prior to the COVID-19 pandemic before 2023. However, 12.4% of the companies currently see no opportunities for their own area of activity. Accordingly, they tend not to believe that the industry will be able to recover fully.

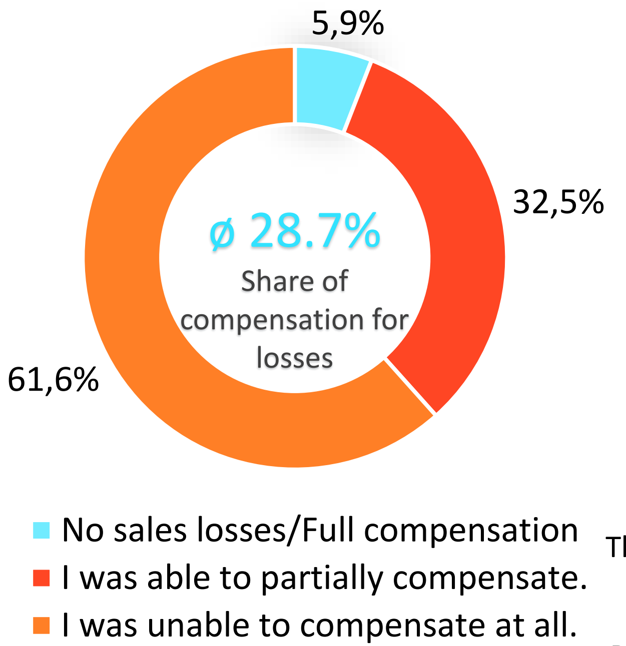
The current situation and perspectives

Current situation – General overview

How the Covid-19 pandemic affected sales



Compensation for sales losses



Industries/New business areas

Event organizers/venue operators were able to offset sales in particular by setting up testing/vaccination centers as well as training and examination facilities.

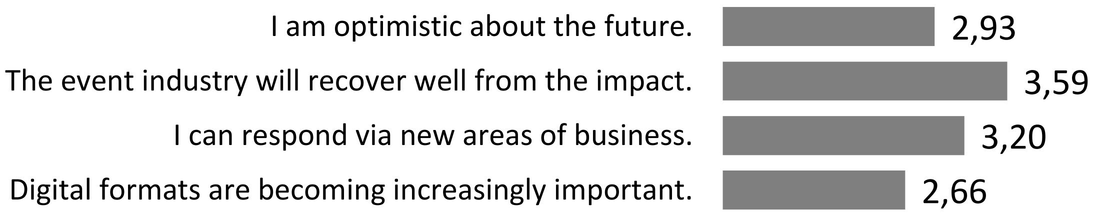
For service providers, activities in the security/personnel and service provider subsectors were relevant (e.g. agriculture, care and maintenance, building cleaning, construction/construction trade/construction workers, store fittings, repair work, small jobs, logistics, facility management, house/garden services).

Consulting, advertising, marketing/advertising services, coaching, digitalization/hybrid (technical support/digital consulting), IT services/web design, music production, and management consulting also played key roles for event agencies or event management.

Artists and creatives found new fields of employment particularly in the training/education sector (e.g. music lessons, lecturing, online teaching). However, TV formats, digitalization, event design for digital events, streaming, film/TV, graphic design, photography, web design, design/layout, IT, media design, media consulting and music productions were important fields of activity.

Optimism in the industry after Covid-19

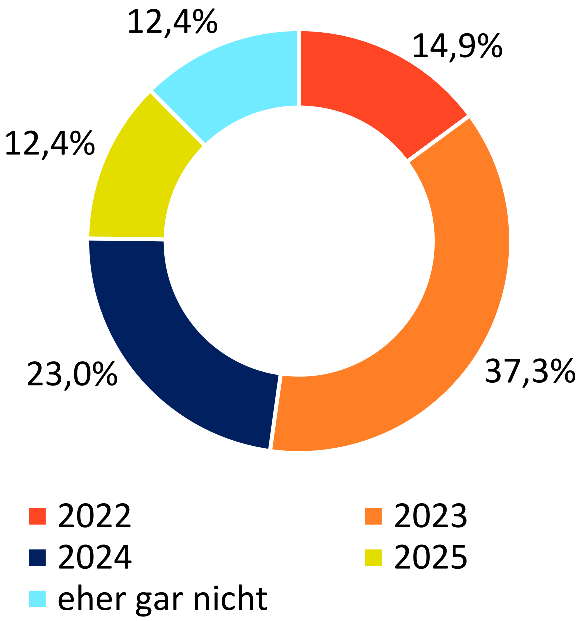
(1 – Do not agree at all - 5 – Agree entirely)



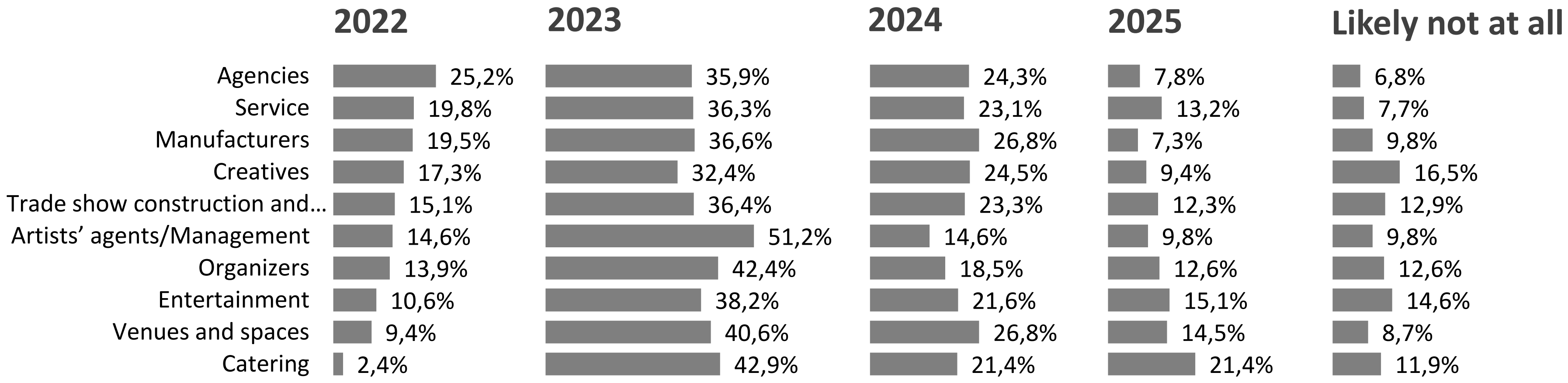
The situation during the COVID-19 pandemic

Prospects for the event industry

Recovery of their own area of activity to pre-COVID-19 pandemic levels



By area of activity (clusters)



At the time of the April/May 2021 survey, only a small proportion of respondents believed that their area of activity would recover in the coming year. The majority of players expect a return to pre-COVID-19 pandemic levels in 2023 or 2024.

Creative professionals along with the entertainment, trade show construction and technology subsectors as well as event organizers and catering services are less confident overall about a general recovery.

(7) Structures and sociodemographics

Structures and sociodemographics

Overview of the structure and sociodemographics of the present study

The figures below provide an overview of the structure and sociodemographics of the present study.

In terms of legal form, almost two-thirds of companies in the event industry operate as sole proprietorships. Other prominent legal forms include corporations and partnerships. Approximately one third of the companies are entered in the commercial register.

Five out of six players pursue their primary occupation in the event industry. Over 80 percent of those persons who hold a second job in the event industry are salaried employees (and half of these work outside the event industry).

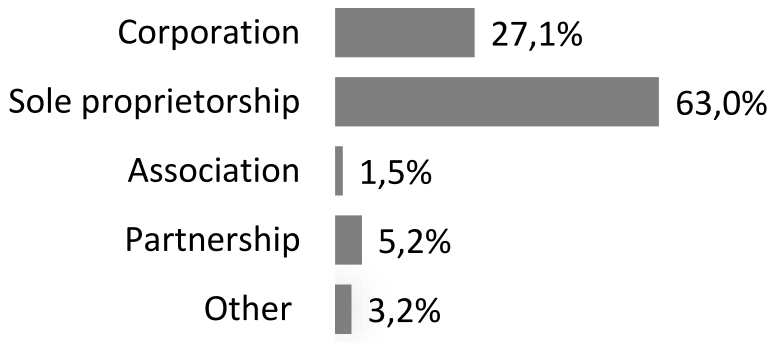
In the study, companies organized in associations are overrepresented compared to actual membership. This is due in particular to the fact that the invitation to participate in the survey was issued primarily via the participating industry associations, as well as through other communication channels. On average, the companies surveyed stated that they belonged to 1.4 industry associations.

The study shows a high proportion of male players in the events industry (84 percent). The average age of the respondents was 44 years, and the vast majority have been working in the event industry for nearly 20 years, reflecting their deep roots in this industry.

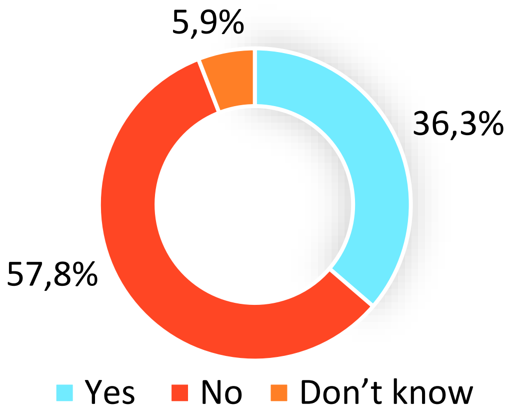
Structures and sociodemographics

Legal forms, structures and memberships – general overview

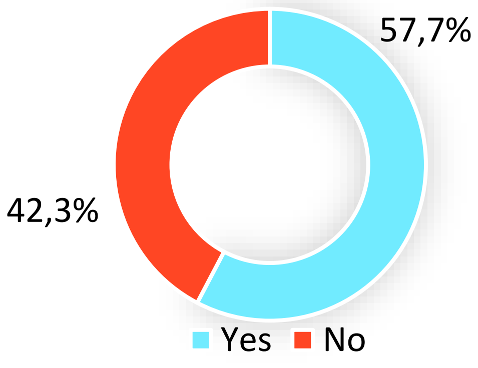
Legal forms



Commercial register



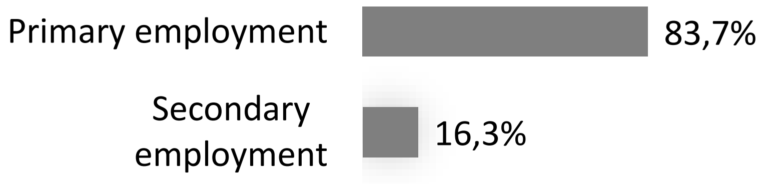
Association member



(Multiple responses)

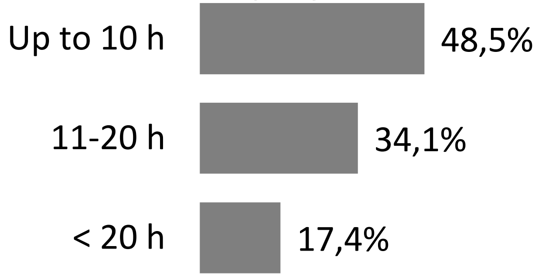
isdv	34.6%
VPLT	18.3%
EVVC	9.0%
DTHG	7.1%
FAMAB	6.7%
vdt	6.1%
DEHOGA	5.5%
BDKV	5.1%
VLLV	3.2%
LIVEKOMM	2,0%
APWPT, AUMA, BAVBT, BVB, bvvb, Deutscher Bühnenverein, DTHG, FAMA, IgPV, InThega, VDVO	8,8%
Further entries: (e.g. BSM, BuTiöR, VGSD)	36,8%

Employment



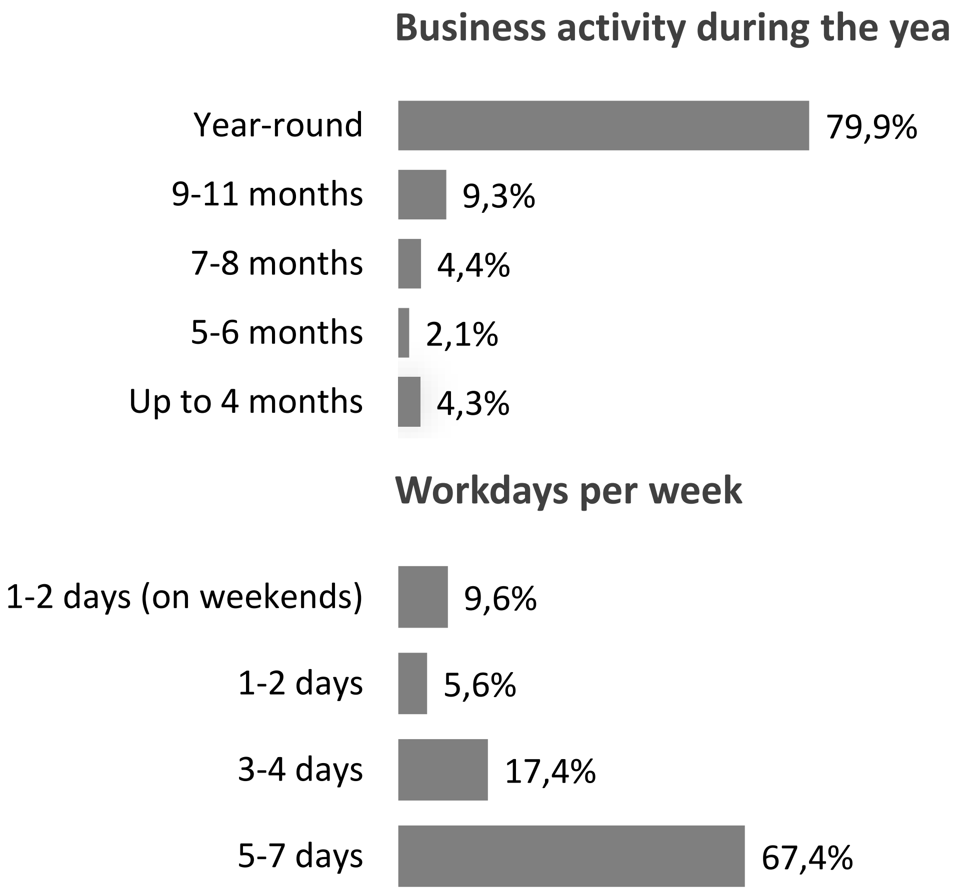
Primary activity with secondary employment

Working hours in secondary employment



Structures and sociodemographics

Business activity during the year and workdays per week



Looking at the business activities of the players over the course of the year, it is evident that almost 80 percent are active throughout the year.

Only a small percentage of respondents are actively involved in the events industry for 6 or fewer months of the year.

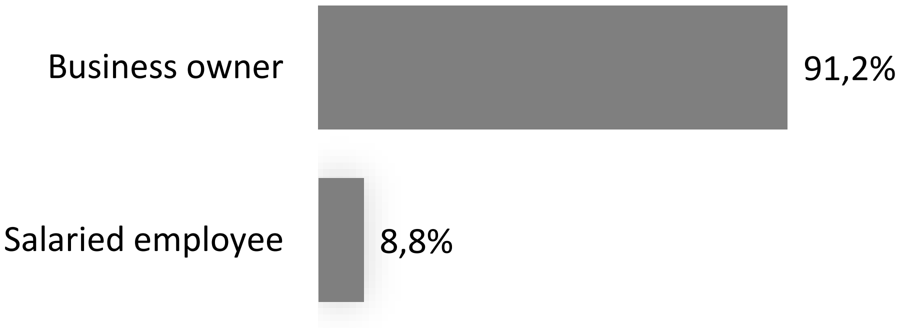
In addition, two-thirds of players work 5 or more days a week. About a quarter have a 7-day week (27.5%).

About 10 percent of the players work exclusively on weekends.

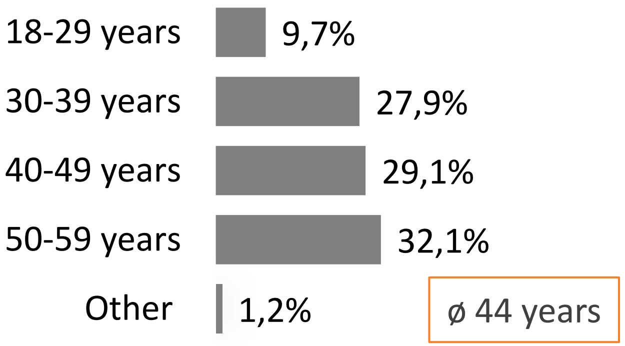
Structures and sociodemographics

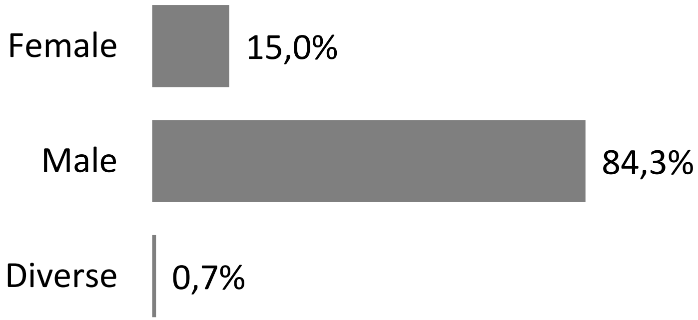
Sociodemographics

Responder



Age and gender of the business owners





Over 90 percent of the respondents were the owners of the companies themselves.

The average age of the respondents was about 44 years.

A look at the gender distribution reveals a preponderance of male players in the event industry (84.3%).

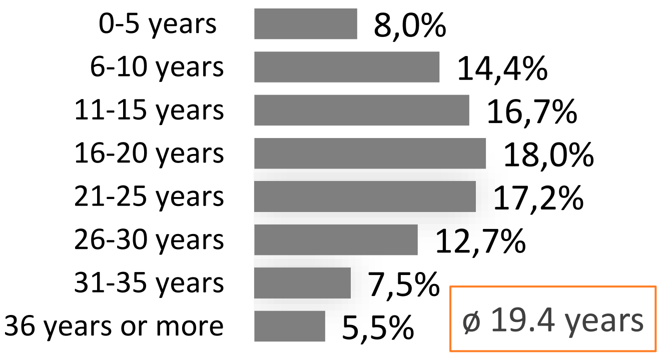
This can be attributed primarily to a high proportion of technical service providers in the events industry. Here, the proportion of women is less than 10 percent.

All other subsectors of the event industry have an average share of women of around 25%.

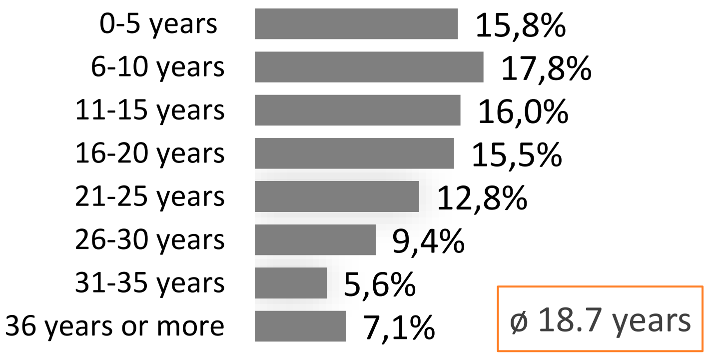
Structures and sociodemographics

Sociodemographics

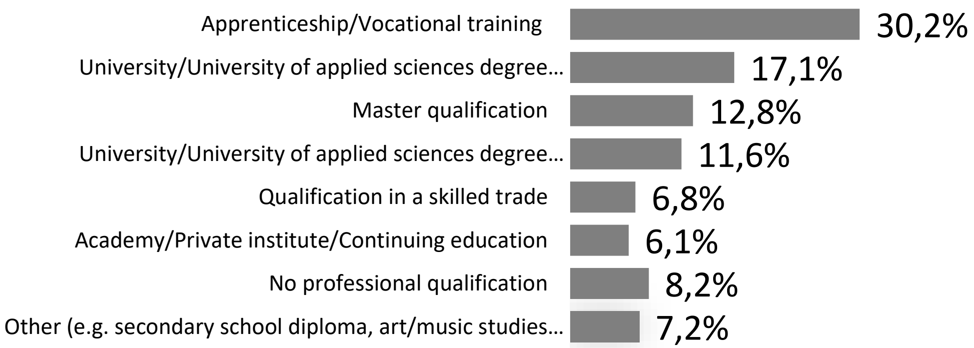
Length of tenure in the company (of the business owner)



Length of time in business (company)



Business owner qualifications



The sample shows an excellent distribution with regard to the length of time the business owner has been in business. In addition to people who have been with the company for a very short time and "old hands", the majority of respondents have several to many years of experience in the industry.

Likewise, there is a balanced result with regard to the duration of the business activity (How long has the company been active in the event industry?). In addition to newly founded companies, it was also possible to reach companies that have been in existence for many years.

On average, business owners have been active in the industry for somewhat longer. This suggests that some players are initially gaining industry experience outside of self-employment.

The information on the professional qualifications of the business owners shows the breadth of the qualification spectrum.

(8) Appendix: Methodology and terminology

The event industry in Germany

Representativeness of the study – appendix on methodology

Survey participants by sales volume class (based on sales tax statistics)

The overview shows the structure of the survey participants in comparison to the sales volume classes of the sales tax statistics (German Federal Statistical Office, 2020). In particular, economic sectors that are significant for the event industry were taken into account.

Structure of the survey participants

	€ 22,000 - 100,000	€ 100,000 – 500,000	€ 500,000 - 2 million	€ 2-10 million	€ 10–50 million	> € 50 million
Respondent sample	48.06%	22.91%	15.40%	10.47%	2.38%	0.78%
Sales tax statistics	49.88%	31.49	11.88%	4.72%	1.50%	0.54%

Overall, the sample shows a good distribution across the sales volume classes. However, medium-sized (from €500,000) and large companies (from €10 million) are overrepresented in the sample overall. This picture is even more pronounced in individual subsectors, such as organizers and venue operators. Here, major trade show and event centers distort the picture in some cases. By contrast, the picture is reversed in the entertainment and creative sectors. Major artists and creative professionals are missing here. The sample achieved a good distribution for the service provider subsector, so that the distribution by sales volume class according to the sales tax statistics (German Federal Statistical Office 2020) was used for the extrapolation.

With regard to the distribution across federal states as well, the sample achieves a good fit to available data from the sales tax statistics. For the creation of the maps, the data from the sales tax statistics were likewise used in order to avoid minor distortions for individual subsectors.

The event industry in Germany

Definition of terms and classification of clusters in the event industry

Organizing companies/ Event organizers

Trade shows and exhibitions; conventions, conferences, meetings, workshops, seminars; Music (tours, concerts, festivals); culture (theater, opera, classical concerts, comedy, readings); celebrations (markets, private celebrations/social events); sports (tournaments, championships, sports events, public viewing)

Venues and spaces

Trade show/exhibition halls; event centers, convention halls (convention centers, multi-purpose halls, local event facilities; conference and convention hotels; event venues (industrial/factory halls, palaces/castles, museums, studios, universities); stadiums, sports halls, arenas; open spaces, open-air/festival grounds, parks; halls, guest rooms, clubs

Service providers

Agencies		(live communication agency, graphics and communication agency, event agency, IT/web agency, trade show stand construction agency, management consultancy, design/architecture)
Trade show construction and technology		
	Specialist planning	(safety/work safety/event safety, technology, stage/grandstand/bleacher construction, event technician, event/project management, production management, logistics and process planning)
	Event Technology	(lighting technology, sound equipment, camera and video, A/V media technology, special effects, stage technology, rigging, energy technology)
	Infrastructure and equipment leasing	(seating, furniture, technology (e.g. lighting, sound, A/V media), stage/stage technology, equipment and decoration, tent rental and mobile infrastructure)
	Trade show/stage/ grandstand construction	(trade show, stage/grandstand/bleacher construction, decoration construction, carpentry)
Artists' agents and management		(artist agents, organizers, artist and tour management, booking)
Catering		(backstage/guest catering, mobile kitchens)
Services		(security and personnel service providers, ticketing, logistics [warehousing, forwarding, event trucking, tour buses])

The event industry in Germany

Definition of terms and classification of clusters in the event industry

Entertainment and creatives		
Entertainment		
	Artists	(musicians, singers, bands/DJs, actors, dancers, comedy, showmen/market traders)
	Moderators/Speakers	
Creatives		
	Film/Sound	(directors, filmmakers, audio contributors)
	Creatives	(designers, graphic designers, sound/lighting designers, web designers)
	Press	(journalists, photographers)
Manufacturers		
Event technology		(lighting technology, sound technology, camera and video, A/V media technology, special effects, stage technology, rigging, energy technology)
Infrastructure		(furniture, stage/stage technology, equipment and decoration, tents and mobile infrastructure)

(9) Supporters

The event industry in Germany

Supporters

"ZÄHL DAZU (COUNT US IN) is the investment we are all making in the reboot. A study from the event industry from each and for each of the very cogs that keep it going."

Nicole Behr, IGVW board member

The study was funded via a crowdfunding campaign that involved the entire event industry and further underscores the tremendous cohesiveness of the industry.

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The Event Industry in Germany

Participating associations

The Event Industry in Germany

Company information and legal notice

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Interessengemeinschaft Veranstaltungswirtschaft e. V.
Wohlenbergstrasse 6
30179 Hannover
Germany

in cooperation with

Technical University of Chemnitz

and

R.I.F.E.L. Research Institute for Exhibition and Live-Communication e.V.

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Dr. Cornelia Zanger, TU Chemnitz

Dr. Kerstin Klaus

August 2021