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ITB Berlin – The World's Leading Tourism Fair

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Abstract

MICE is a significant segment of tourism industry. It is of great interest for exhibitors and visitors, as well as for host cities and organizers. ITB Berlin represents the world's leading travel trade show. This paper analyses the key trends of this event in the last five year period (from 2004 until 2008). Analyzed data was annually gathered by Gelzus Messe-Marktforschung GmbH.

This research focused on exhibitors', trade visitors and private visitors' origin, age distribution of private visitors, exhibiting companies, exhibiting branches, interest for travel according to type and overall impression and outlook that was gathered through surveys at ITB Berlin. Data was collected in the period 2004-2008 and placed together to make a five year overview. The goal is to present a development of above mentioned values and to discover potential patterns and predict future trends for this tourism fair.

Key words: tourism, MICE, business tourism, exhibition, Berlin, fair

Introduction

The main purposes of exhibitions are to generate sales, promote new products, maintain or create industry contacts, and to act as places that facilitate the exchange of ideas and information between exhibitors, industry experts and visitors. Thus, from the point of view of those exhibiting at trade/consumer shows, these events are a key component of their communications and marketing mix.

Exhibitions are generally recognized to be a cost-effective way of communicating information between buyers and suppliers. Without this important form of two-way communication, the supporters of exhibitions maintain, the efficiency of trade would be diminished severely. As an advertising medium, exhibitions are said to play a vital role in the marketing of goods and services. In this way, they can be used to stimulate domestic trade and promote exports when they are attended by foreign visitors (Davidson, Cope, 2006).

The paper presents chronicles of ITB Berlin and analyzes and discusses key trends of this event in a time period between year 2004-2008. Statistical data was gathered and provided by Gelszus Messe-Marktforschung GmbH from Dortmund.

MICE[1] as a significant sector of tourism industry

Exhibitions are such events where on a regular basis those who produce the products or service can display them, explain them and sell them to potential customers. Generally speaking, exhibitions may be divided into two categories: trade fairs/shows and consumer fair/shows. The former are usually business-to-business events usually restricted to those seeking to purchase products or service for use in their business or professions.

Consumer fairs are generally open to the public, and feature any products or services that people are prepared to purchase. ITB Berlin can be placed in both of these categories, as it is an important event for both trade and private visitors.

[1] Acronym Meetings-Incentives- Events- Conferences

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It is open both for trade and public, but on separate days. The main purposes of exhibitions are to generate sales, promote new products, maintain and create industry contacts, and to act as places that facilitate the exchange of ideas and information between exhibitors, industry experts and visitors (Davidson, Cope, 2006).

Business results of a travel company depend largely on the satisfaction of customers. Returning costumers as well as established relationship of loyalty are sings that the company is doing well on the tourist market. successful marketing strategies based on the knowledge of potential tourist`s needs and wishes determine sales and profit of a particular travel company (Djeri, et al., 2007).

From the exhibitors' point of view, ITB Berlin is a key component of their communications and marketing mix. For visitors seeking to make a purchase or find out about a particular product, ITB Berlin bring together under one roof an extensive range of goods and services of direct interest to them. The economic benefits generated by ITB Berlin for Berlin as a tourist destination are considerable. Many of these benefits arise from the spending of the exhibition organizers, visitors and exhibitors on travel, accommodation, recreation and entertainment at the destination.

In common with other sectors in the business tourism industry, the demand for exhibitions tends to track the general state of the national and global economy. For exhibitors, participating in a trade fair or consumer show means investing substantially in preparation, promotion, stand design and build, as well as the many staff expenses incurred by their employees who work at the event. (Davidson, Cope, 2006)

According to survey, exhibitors, trade visitors and private visitors have an overall positive impression about ITB Berlin. This indicates that spending on exhibitions is bringing them a worthwhile return of investment.

Chronicle of ITB Berlin

From 1945 until 1990 Berlin was a divided city. Following the defeat of the Nazi regime in World War II (1939-1945), the victorious Allied Powers—the United States, Britain, France, and the Union of Soviet Socialist Republics (USSR)—divided Germany into four zones, each occupied by one of the Allied Powers. They also divided Berlin, which was in the Soviet sector, into similar zones. East-West tension began its steady climb in late 1946 (Kotowski, 1990) and increased significantly with the approval of the Marshall Plan and the Soviet veto of anti-communist Ernst Reuter's (Social Democratic Party of Germany SPD) election as Mayor of Berlin in June 1947. Within months, the Socialist Unity Party (SED) changed its self-depiction from participant in the 'anti-fascist front' to leader of the 'battle for German unity' against the Western forces. The failure of the London Conference in December 1947 and the onset of the Blockade of Berlin in June 1948 all but sealed the fate of the city. Finally, separate East and West Berlin governments emerged in late 1948 and the GDR was founded on 7 October 1949.(Hillgruber, Langguth, Klessmann, 1995) The Soviet-controlled sector of the city became known as East Berlin, and the Western-occupied sector became known as West Berlin. In 1949 East Berlin became the capital of the German Democratic Republic (known as East Germany), one of two successor states established in Germany after the war. That same year the capital of West Germany, the other successor state, was established in the city of Bonn. West Berlin remained an urban island surrounded by Communist East Germany. The city became a focus of Cold War tensions between Communist countries led by the USSR and anti-Communist states led by the United States. In the 1950s West Berlin was rebuilt as a showplace of Western prosperity in the heart of a Communist state. The standard of living in West Berlin rose above that of East Germany and East Berlin. Between 1949 and 1961 about 2.7 million people left East Germany by way of West Berlin to take advantage of greater economic opportunities and political freedom. In 1961, in order to stop the outward flow of some of its most educated and well-trained citizens, East Germany unexpectedly constructed a barrier of barbed wire and concrete around West Berlin. Where a wall was not possible, buildings were bricked-up. The only openings in the wall were two closely guarded crossing points. Although the GDR announced that the wall was needed to prevent military aggression and political interference from West Germany, the East German government built tank traps and ditches along the eastern side of the wall, suggesting that it was constructed to keep East German citizens in. The newly constructed Berlin Wall angered the Western Allies, but they were unwilling to risk a major international confrontation over the issue. The Berlin Wall was standing until 1989. Berlin became a venue of political competition between East and West during the Cold War. (Stangl, 2006) While citizens of East Berlin were "walled in" and travel was virtually impossible as a consequence of Soviet isolationism policy, in West Berlin that was not the case. Although an enclave in East Germany, West Berlin was a part of West Germany, there for all the citizens of West Berlin could enjoy rights as same as other citizens of West Germany. On the other hand, due to their specific geographical position deep in East German territory, their travel options were restricted. That is one more reason why Berlin was chosen as venue of tourism fair. Separated city was the scene were east and west were competing and showing their achievement- weather it is Alexanderturm TV tower in east as symbol of communist architecture or Kurfürstendam shopping street in capitalist manner in west. Apart from economical benefit for a city, tourism fair was also making a clear political statement, demonstrating tourism and free travel against isolation.

In 1965, a year before the first event took place, the German tourist authorities were far from enthusiastic about the idea of establishing a trade show of this kind in Berlin. The Berlin Fair archives contain correspondence in which the idea of staging a "tourism exchange" is described as "utterly futile" and advised against in no uncertain terms. The "Berliner Morgenpost" newspaper, meanwhile, described the idea of a "travel exhibition" as "ingenious", particularly in the light of West Berliners' restricted travel options.

But it gave far better chances to a Germany-only trade show than an international exhibition. Not one to be put off by the detractors, Prof. Dr. Manfred Busche launched the first event in 1966. It was part of an overseas imports trade show: Nine exhibitors from five countries – Brazil, Egypt, the Federal Republic of Germany, Guinea and Iraq – presented their products and services to 250 trade visitors in a display area of 580m². "New holiday destinations in new continents" was the subject of a discussion with 24 Central and West African states at a seminar in the Tiergarten convention center. The sharp increase in options available to holiday-makers and mushrooming travel companies and organizations in the 1960s conspired to make the second event in 1968 a tremendous success, too. The "2nd International Tourism Exchange" was held at the same time as the Berlin International Boating and Leisure Exhibition. The temporary "Mega Travel Agency", now spanning 4,700m2, had grown to accommodate 1,250 trade visitors. 123,500 Berliners came to learn about foreign holiday destinations.

It was the time of the "Cold War", and yet two Eastern bloc countries, Romania and Hungary, were also represented. The ITB Berlin was to remain a presentation platform transcending political boundaries over the following years also, during which exhibitors from the GDR and the Soviet Union, Egypt and Israel showcased their respective countries in a spirit of peaceful coexistence – even, for instance, in the direct aftermath of the 1967 Six-Day War between Israel and the Arab states of Egypt, Jordan and Syria.

The ITB Berlin's display area grew at a dizzying pace: In 1972 it reached a five digit amount, measuring 13,400m2. In 1974 the exhibition area exceeded the 20,000m2 mark. By 1976, 35,500m² were available to exhibitors. Five conference rooms for events and press conferences were inaugurated and used for such events until the opening of the ICC Berlin conference center in 1979. The Association of German Travel Journalists (Verband Deutscher Reisejournalisten) presented the first of its annual awards for deserving recipients in the field of tourism. In 1980, the ITB Berlin covered almost 52,500m2 and became independent of the boating exhibition. Today, all 26 halls in the venue under the radio tower, with a total area of around 150,000m2, are used to capacity.

ITB Berlin always keeps the pace with ever changing trends in tourism industry. The ITB Berlin is both a catalyst for success and a barometer of trends for the entire industry. It is marked indelibly in the events' calendars of the major international tourism associations PATA, WTO, WTTC, COTAL and ASTA and in the marketing schedules of tourism firms. The world's largest travel show anticipates new market trends and is constantly implementing new concepts.

The arrangement of halls according to country and the introduction of trade show segments has improved presentation, making it easier for visitors to find their way around the exhibition. Social trends and economic developments are reflected at the show.

In the 1980s, critical voices were raised concerning problematic aspects of tourism, paving the way for new, alternative travel options. Trends such as "soft" tourism and health tourism in the 1990s and the subsequent "wellness" wave were all addressed at ITB Berlin, developed further, and placed on the market as sure-fire product ranges.

Business travel was already a key topic at ITB Berlin as early as 1985. Since 2006, the trade show has covered all aspects of this segment, including a wide range of professional development options. New products and services for every kind of customer, from young people, senior citizens and the disabled through to families and hikers, cater to an increasingly diversified demand.

The ITB Berlin has consistently presented new technologies. Since 2000, a separate exhibition area has been devoted to "Travel Technology". For some years now, digitalization has been changing the face of the travel industry more than almost any other business segment. Today, the entire branch meets at ITB Berlin. Since 2004, ITB Berlin takes place in parallel to the tourism industry's leading convention– the ITB Convention Market Trends & Innovations. Events addressing topics such as aviation, hospitality or tourism marketing are held to discuss current trends and their impact on the international tourist trade (www.itb-berlin.com).

Analysis, results and discussion of ITB Berlin key trends

As ITB Berlin is the worlds' leading tourism fair, it was of interest to analyze its actors- exhibitors, trade visitors and private visitors. Period analyzed is between year 2004 and 2008, to get an overview and discover a pattern in a five year period with most recent data. Results and discussion of the statistical data follows.

Analysis, results and discussion of ITB Berlin Exhibitors 2004-2008

The table 1. shows exhibiting companies in a time period 2004-2008. Multiple citations were permitted and extract of denominations N>5%.

In order to get a better overview, data from table 1 is imported in figure 1.

Figure 1 clearly presents that majority of ehibiting companies are from sectors of tourist board, hotel business and travel organizers. These three are the most significant stakeholders of tourism industry, thus they are exhibiting in highest ratio. For most of these companies, ITB Berlin is the most important exhibition, both because of it's date and other participants.

Table 2. contains data about origin of exhibitors.

Most of the exhibitors are domestic (Germany). The following two largest groups are exhibitors from the rest of the European Union and from the rest of Europe. Conclusion is that most exhibitors are Europeans. Europe represents the biggest in-coming and out-going tourism market in the world. Germany is one of the most significant single out-going travel industry markets, therefor these figures make perfect sence.

***Table 1** Exhibiting companies, %*

Category / Year	2004	2005	2006	2007	2008
Tourist Board	23.90	22.90	18.90	20.70	20.90
Hotel business	22.70	26.00	21.60	23.50	21.00
Travel organizer	20.10	18.80	18.00	17.80	18.40
Travel agency	11.30	12.30	8.70	8.80	10.10
Traffic carrier (bus, railway,shipping, airline company)	10.80	10.00	7.80	7.60	6.80
Tourist association/organization	9.30	10.00	6.10	6.10	8.00
Travel Technology/information and reservation systems	5.50	5.40	8.60	6.80	7.50

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

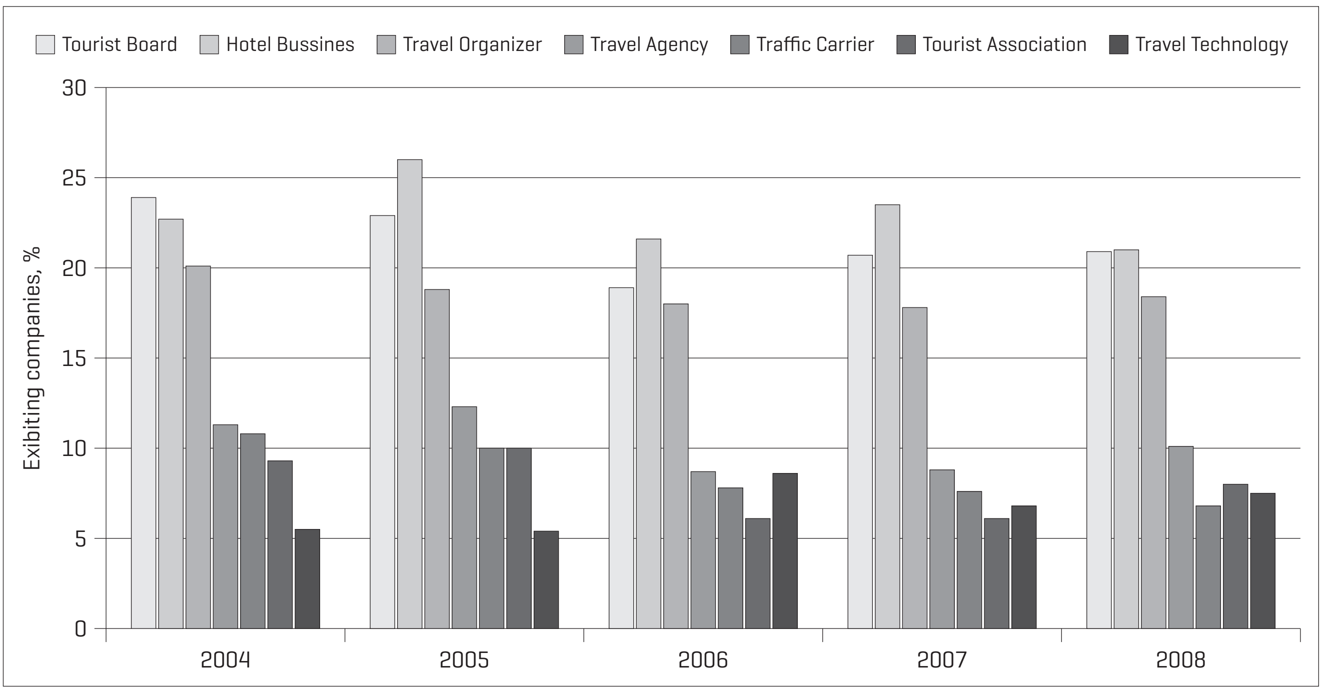

Figure 1 Exhibiting companies
Source: Gelszus Messe-Marktforschung GmbH, Dortmund

Table 2 *ITB Berlin exhibitors origin 2004-2008, %*

Region or Country/ Year	2004	2005	2006	2007	2008
Germany	38.30	34.00	37.50	32.20	35.10
Rest of European Union	17.20	30.60	20.10	21.30	22.90
Rest of Europe	17.10	9.70	8.00	9.20	10.10
North America	11.00	8.40	7.50	5.40	4.00
The Near East and Central Asia	7.60	5.30	4.10	6.60	4.90
Africa	7.30	7.70	6.30	6.90	7.30
Eastern Asia	6.10	5.90	7.10	4.70	5.40
Central America/ the Caribbean	3.40	3.40	2.40	3.20	2.10
South America	2.60	1.70	1.40	2.30	2.50
Australia/ New Zealand/ Oceania	1.50	1.20	0.30	0.70	0.50

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

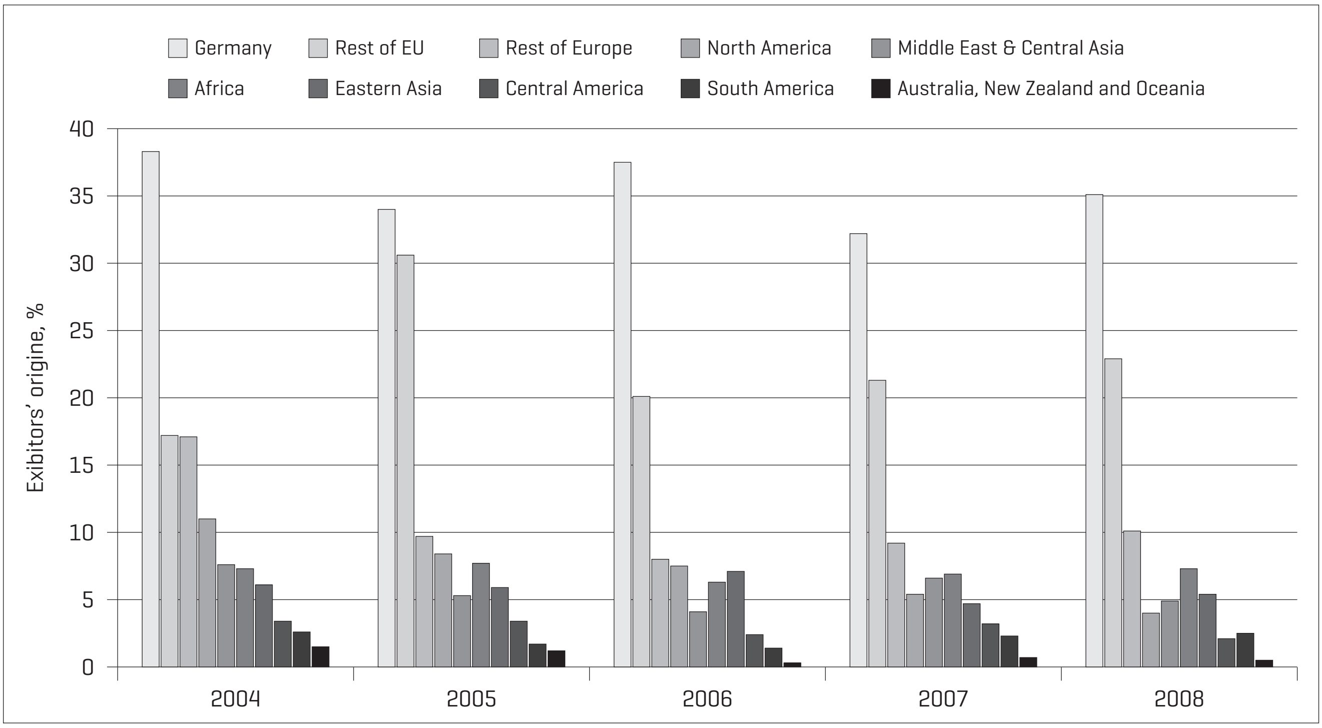

Figure 2 ITB Berlin exhibitors origin 2004-2008
Source: Gelszus Messe-Marktforschung GmbH, Dortmund

Figure 2. presents a chart of exibitors' origin of ITB Berlin 2004-2008.

Analysis, results and discussion of ITB Berlin trade visitors 2004-2008

Second group that was analyzed were trade visitors of ITB Berlin. Table 3. presents data of exhibiting branches.

Biggest groups of exhibiting branches are travel organizers, travel agencies and hotel business. Comparing these results with exhibiting companies, there is a clear connection. In exhibiting branches, travel agencies play a more significant role.

This is probably the result of business contact of small and medium travel agencies and retail agencies that are looking for business opportunities and cooperation with travel organizers.

Figure 3. graphically presents information from table 3.

Origin of trade visitors are shown in table 4.

From figures in table 4. it is clear that most of ITB Berlin trade visitors, around 2/3 in the last five year period, were Germans. Foreigners make roughly 1/3 of all trade visitors, out of which around 80% are Europeans. Origin of trade visitors is related to origin of exhibitors at ITB Berlin on the same basis as mentioned above.

***Table 3** Exhibiting branches at ITB Berlin 2004-2008, %*

Category / Year	2004	2005	2006	2007	2008
Travel organizer	17.60	16.70	19.70	20.90	21.00
Travel agency	14.10	13.70	13.40	15.10	14.60
Hotel business	7.60	8.40	11.20	10.60	8.60
PR / consulting / advertising agency	5.10	5.40	5.20	5.50	5.70
Traffic carrier (bus, railway, shipping, airline company)	5.00	3.90	4.70	5.20	5.10
Tourist association/ organization	4.50	3.80	4.50	4.80	5.00
Tourist Board	4.30	3.70	4.30	4.50	
Travel Technology/ information and reservation systems	3.00	3.30	4.30	4.50	2.70
Research institute/ educational institution	2.90	2.90	3.50	4.00	3.80
Publishing house/ press	2.70	2.70	2.90	3.20	
Conference and convention organizers	2.50	1.80	2.60	2.30	2.30
Amusement parks	0.80	0.80	0.70	0.90	0.70
Other	9.30	12.20	10.20	17.60	18.10

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

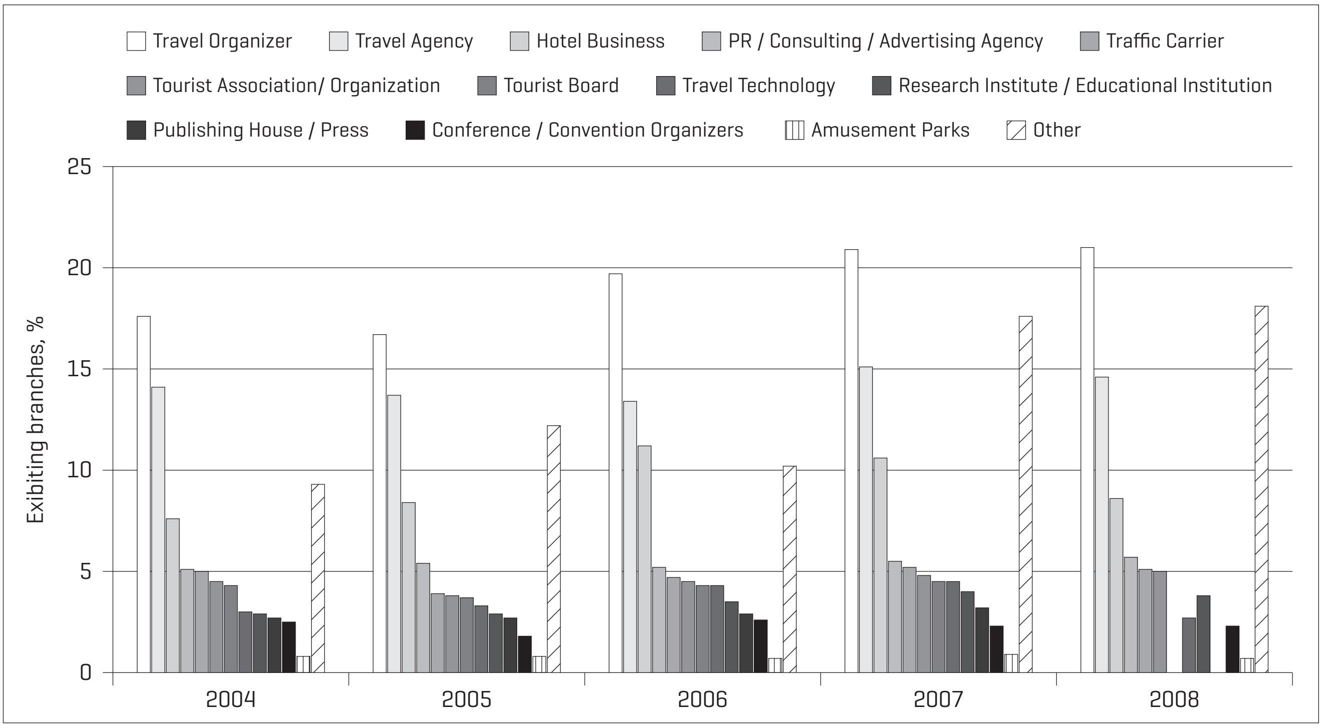

Figure 3 Exhibiting branches at ITB Berlin 2004-2008
Source: Gelszus Messe-Marktforschung GmbH, Dortmund

***Table 4** The origin of ITB Berlin trade visitors 2004-2008, %*

Continent or Region / Year	2004	2005	2006	2007	2008
Germany	68.30	66.40	63.70	65.40	65.70
Abroad	31.70	33.60	36.30	34.60	34.30
EU	33.30	76.60	67.00	66.20	67.10
Other European countries	50.70	9.00	11.70	10.30	12.00
Africa	7.90	4.40	7.60	7.40	7.20
Asia	4.50	4.60	7.70	10.80	8.90
The Americas	3.40	5.20	5.60	4.60	4.50
Australia	0.20	0.20	0.50	0.70	0.20

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

Analysis, results and discussion of ITB Berlin private visitors 2004-2008

Table 5. shows interest for travel according to type among private visitors in period 2004-2008. Multiple citations were permitted and extract of denomination is >4%.

The biggest interest according to travel type is for holiday trips and pleasure trips. These are traditional 3S pack tours. Interest for selective types of tourism is significantly lower. However, as there are many types of selective tourism, when put together, they make fairly the same percentage as holiday trips and pleasure trips. Although the interest for selective tourism has a positive growth, still traditional forms are the most popular. Private visitors have shown the lowest interest for student and youth travel. Origin of private visitors is given in table 6.

According to table 6. domestic visitors are an absolute majority in private visitors of ITB Berlin 2004-2008. Same can be seen on figure 5.

Table 5 *Interest for travel according to type among private visitors 2004-2008, %*

Tourism activities / Year	2004	2005	2006	2007	2008
Holiday trips and pleasure trips	84.40	73.60	69.20	73.60	74.40
Adventure trips	26.30	28.90	21.90	26.50	29.00
Cultural tourism	22.50	30.50	33.50		
Educational trip/study trip	20.40	21.40	23.70	26.40	25.20
Trips made for health reasons/health cure	13.10	12.30	12.20	19.00	19.60
Sporting trips	12.70	12.00	11.90	13.10	15.90
Student and youth travel	5.40	3.70	5.20	5.60	8.70

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

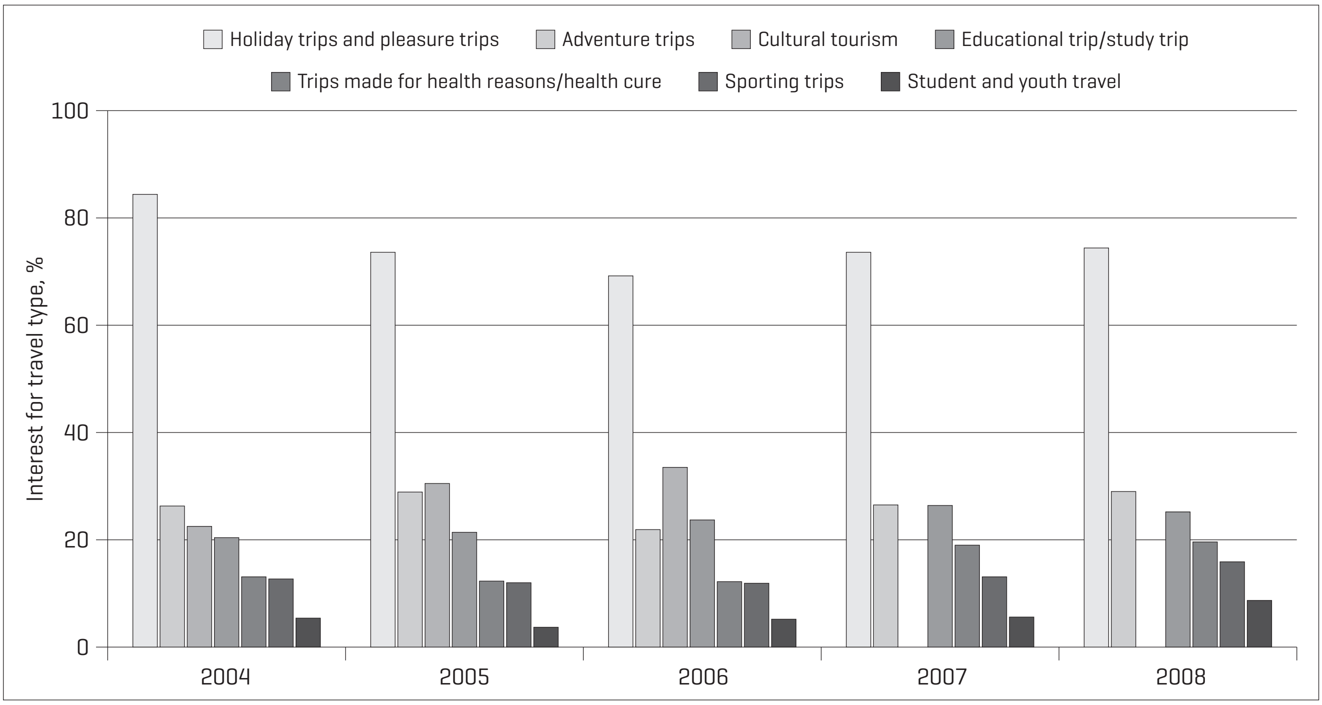

Figure 4 Interest for travel according to type among private visitors 2004-2008, %
Source: Gelszus Messe-Marktforschung GmbH, Dortmund

Table 6 *Origin of private visitors of ITB Berlin 2004-2008, %*

Category visitors / Year	2004	2005	2006	2007	2008
Visitors from Berlin	58.50	57.60	60.40	61.50	59.50
Visitors from the ‚new' states of Germany	26.40	26.60	26.10	24.10	24.50
Visitors from the ‚old' states of Germany	12.00	11.40	10.30	11.80	11.60
Visitors from abroad	3.10	4.40	3.20	2.60	4.30

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

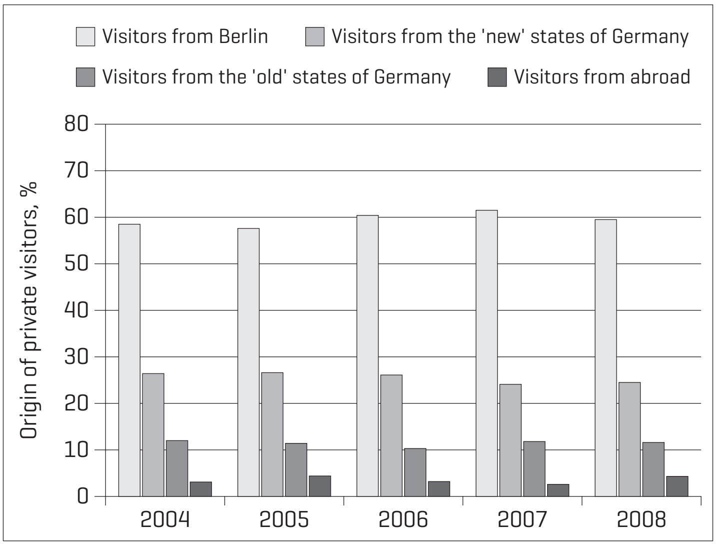

Figure 5 Origin of private visitors of ITB Berlin 2004-2008, %
Source: Gelszus Messe-Marktforschung GmbH, Dortmund

Table 7 *Age of private visitors at ITB Berlin 2004-2008, %*

Category / Year	2004	2005	2006	2007	2008
0-20	8.10	7.50	6.60	6.30	4.80
21-30	18.10	20.90	13.40	16.00	12.40
31-40	18.00	18.60	16.10	13.90	15.90
41-50	21.10	22.40	22.60	20.80	24.90
51-60	16.90	14.70	18.40	20.60	20.80
Over 60	17.70	15.90	22.90	22.40	21.10

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

Age of private visitors is presented in table 7. and in figure 6.

Most of private visitors are age between 21-60 without a clear pattern in the last five years. Only thing obvious is the lower ration of visitors aged 0-20. This is the reason why private visitors show such a low interest for student and youth travel.

Evaluation

Question of return on investments is always raised when it comes to participation in a fair. ITB Berlin uses only rough metods of measuring the effectiveness of participation in this event. Exibitors, trade visitors and private visitors filled an evaluation survey with three categories: „overall positive impression", „would recommend" and „intend to participate again". The results of evaluation are presented in table 8, 9, and 10 and figure 7, 8 and 9.

Only in 2004 and 2008 did exhibitors' overall positive impression about ITB Berlin lower than 90%. Both trade and privare visitors evaluated this category higher than 90% in analyzed time period. Pivate visitors would recommend ITB Berlin with ratio higher than 90% in all five years, while exhibitors had a slightly lower percentage in the last three years. As for trade visitors, it was such a case in 2007. Significance of ITB Berlin for exhibitors is proven by results of the evaluation where 90% of them in the last five years stated that they intend to participate again. Same results are seen at trade and private visitors with lower percentage. Over-

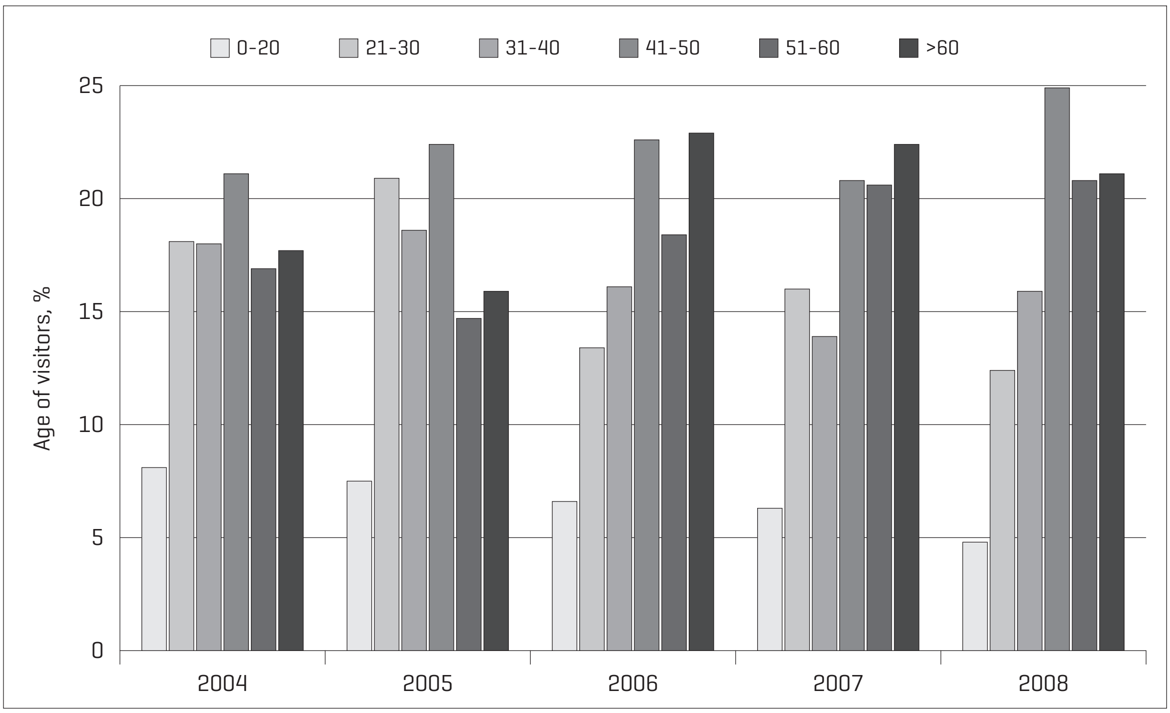

Figure 6 Age of private visitors at ITB Berlin 2004-2008
Source: Gelszus Messe-Marktforschung GmbH, Dortmund

***Table 8** Exhibitors' evaluation of ITB Berlin 2004-2008*

Category evaluation / Year	2004	2005	2006	2007	2008
Overall positive impression	86.90	91.40	91.80	92.10	85.80
Would recommend	91.90	92.70	86.90	84.50	87.60
Intend to participate again	94.50	95.60	92.00	90.30	91.40

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

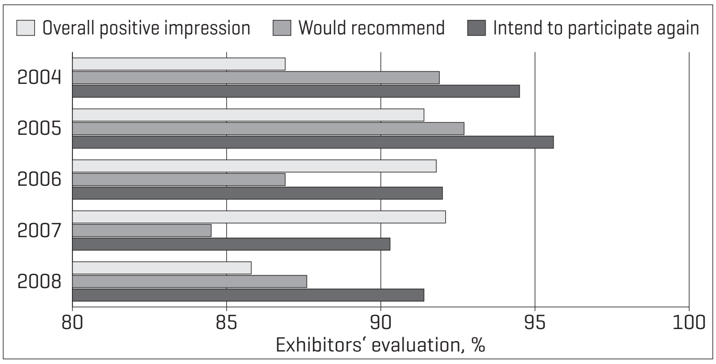

Figure 7 Exhibitors' evaluation of ITB Berlin from 2004 to 2008
Source: Gelszus Messe-Marktforschung GmbH, Dortmund

***Table 9** Trade visitors'evaluation of ITB Berlin 2004-2008*

Category evaluation / Year	2004	2005	2006	2007	2008
Overall positive impression	95.00	95.10	94.50	92.10	93.00
Would recommend	95.40	94.20	96.70	84.50	92.50
Intend to participate again	87.70	85.90	87.30	90.30	91.80

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

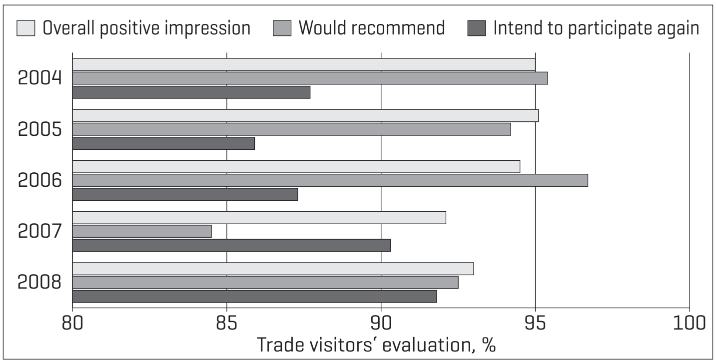

Figure 8 Trade visitors'evaluation of ITB Berlin 2004-2008
Source: Gelszus Messe-Marktforschung GmbH, Dortmund

***Table 10** Private visitors'evaluation of ITB Berlin 2004-2008*

	2004	2005	2006	2007	2008
Overall positive impression	95.60	95.70	95.40	95.40	95.90
Would recommend	92.10	93.90	92.90	92.10	94.30
Intend to participate again	82.70	84.10	86.00	91.30	95.00

Source: Gelszus Messe-Marktforschung GmbH, Dortmund

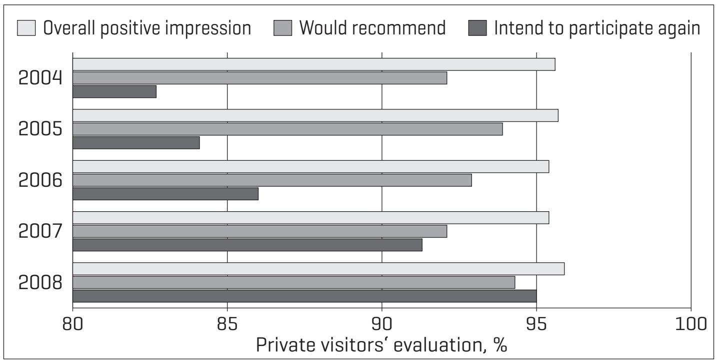

Figure 9 Private visitors'evaluation of ITB Berlin 2004-2008
Source: Gelszus Messe-Marktforschung GmbH, Dortmund

all, the results of evaluation are extremely positive with minimal changes in the last five years, where all categories have result around 90%.

Conclusion

As ITB Berlin is the worlds' leading tourism fair, it was of interest to analyze its actors- exhibitors, trade visitors and private visitors. Period analyzed is between year 2004 and 2008, to get an overview and discover a pattern in a five year period with up-to-date data.

Most of exhibitors are from tourism board, hotel industry and travel organizers. Exhibiting braches of trade visitors are travel organizers, hotel business and travel agencies. This result indicates a high level of B2B significance of ITB Berlin.

Origin of exhibitors and trade visitors is roughly 2/3 European, while others are from other continents. Reason for this is significance of Europe as both in-coming and out-going travel market. Most of private visitors come from Germany, which might indicate a lower B2C value of ITB Berlin on international scale.

Age analysis of ITB Berlin shows lack of visitors aged 0-20. Reason for this is that they are not decision makers when it comes to purchasing a travel product or service. Most significant result is a steady annual satisfaction of all three key actors of ITB Berlin with approximately 90% positive overall impression and outlook at ITB Berlin in the past five years.

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