The structural characteristics of the largest congress venues in Europe

Paola Bensi and Roberto Nelli
(Research Lab on the International Meeting Industry)

1. Methodology

Congresses and conferences are an important part of business tourism in Europe, both in quantitative and qualitative terms. Due to the importance of this industry, there is an increasing need for developing comparable and reliable statistics.

This analysis is the first step of an extensive research project, carried out by the *Research Lab on the International Meeting Industry* (LAMCI), aimed to deepen the knowledge concerning the supply side of the European congress industry as a necessary prerequisite to identify clusters of destinations with specific geographical, socio-economic and structural characteristics and evaluate strategies, performances and issues carried forward by congress venues' managements and involved local governments. A positive congress evaluation is influenced by both structural characteristics of congress venues and tourist related facilities of congress locations such as accommodations, transports, complementary services, climate, museums, leisure activities, etc.

This analysis is focused on the structural characteristics of the largest European congress venues with a minimum capacity of at least 2,000 seats in plenary space (theater style). It examines venues located in 35 European countries including Russian Federation and Turkey.

The analysis includes the following typologies of congress venues:

- congress centers;
- exhibition and congress centers;
- hotels with meeting facilities;
- municipal multipurpose halls;
- historical residences;
- large theaters and cinemas;
- arenas and sport centers capable of hosting congress activities and exhibitions;
- other venues such as university's halls, associations owned halls or television studios.

For each venue, the following variables were collected:

- location with reference to the hosting country, region (based on the European territorial statistics nomenclature NUTS 2) and city;
- the main aspects of the accessibility to the venue (proximity to an international airport and car parking space);

ASERI Working papers

– ownership structure of the congress firm (ultimate controlling shareholders);

– the number and the maximum capacity in theater style of congress halls, meeting rooms, auditoriums and arenas;

– the main characteristics of annexed exhibition areas (covered exhibition space, number of exhibition halls, number of multipurpose halls and their maximum capacity in theater style, maximum height of exhibition and multipurpose halls);

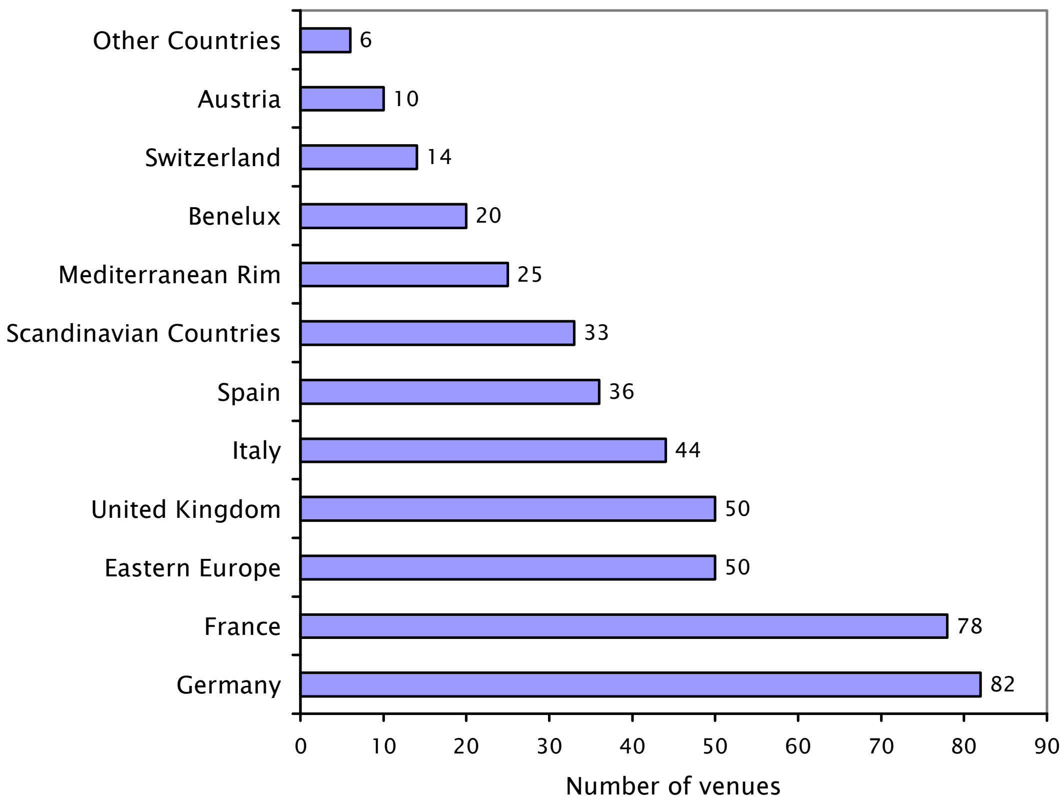
– the main characteristics of auditoriums and arenas (total meeting area);

– maximum capacity of catering areas and number and maximum capacity of restaurants.

2. Main results

The research identified 448 congress venues with a minimum capacity of at least 2,000 seats in plenary space (theater style) in 33 European countries (Fig. 1).

Figure 1 – The number of congress venues



The analysis identified five different typologies of congress sites.

1. **Exhibition and congress centers** (43.3% of the total venues) offering not only conference rooms but also exhibition halls and very large multipurpose halls. This typology of sites characterizes the congress supply in Austria (accounting for 80% of total number of congress

venues), France (65.4%), Benelux (50%) and Switzerland (50%). This typology of sites have the largest total meeting area (an average of 19,166 m^2 per venue), an average maximum capacity of the catering area of 2,841 seats and an average parking lot capacity of 3,723 cars.

2. **Congress centers** (19.9%) characterized by a large number of congress halls with the highest average capacity and by auditoriums with the highest number of seats. This typology of sites characterizes the congress supply in Germany (accounting for 31.7% of total number of venues) and in Spain (25%). These venues have an average meeting area of 14,417 m^2 per venue and an average maximum capacity of the catering area amounting to 1,989 seats.

3. **Theaters and cultural centers** (5.1%), which characterize the congress supply in the United Kingdom and in Ireland, accounting for 16% of total number of venues. This typology of congress sites is, in more than half of cases, owned by governments both national and local and it offers a large number of auditoriums with an average surface amounting to 3,186 m^2 per venue.

4. **Arenas and sport centers** (22.3%), which characterize the congress supply in Eastern Europe countries (accounting for 38% of total number of venues) and in Scandinavian countries (36.4%). They are mainly under private ownership.

5. **Hotels with meeting facilities** (8.3%), mostly under private ownership, offering a large number of meeting rooms with the highest average capacity at the European level (300 seats in theater style). This typology of sites characterizes the congress supply in the Mediterranean Rim countries (acconting for 32% of total number of venues) and in Spain (13.9%).

With regard to the 239 congress venues offering at least one congress hall with a capacity of at least 2,000 seats (theater style), the analysis identified 14 venues (5.9%) offering congress halls with a capacity of more than 4,000 seats in plenary space (theater style) and 196 venues (82%) offering congress halls from 2,000 to 2,500 seats in plenary space (theater style). The application of cluster analysis to the typology of congress venues, the type of ownership, the total meeting area and the maximum capacity of the congress hall has identificated the following three different typologies of congress sites (six venues were not clusterized) (Table 1).

1. **'Multifunctional sites'**: 93 venues (39.9%) represented by exhibition and congress centers under public (59.1%) or private (38.7%) ownership. This cluster offers the highest number of multipurpose halls and exhibition halls per venue, the greatest maximum capacity of the largest room and the greatest capacity of multipurpose hall, the largest covered exhibition space, the greatest capacity of catering area and the largest car parking space. This typology of sites characterizes the congress supply in France, Spain, Eastern Europe, Austria and Switzerland.

2. **'Congress centers and auditoriums'**: 105 venues (45.1%) represented by congress centers (66.7%), arenas and sport centers (13.3%), theaters and cultural centers (8.6%) and exhibition and congress centers (11.4%) of small dimensions (with regard to exhibition area and number of multipurpose halls) compared to other exhibition centers. This cluster offers the highest number of congress halls and auditoriums per venue, the greatest capacity of

congress hall and the largest total area of auditoriums. This typology of sites characterizes the congress supply in Germany, the United Kingdom and Ireland, Italy and the Scandinavian countries; it is under public ownership in 44.8% of cases and under private ownership in 28.6% of cases.

3. **'Hotels'**: 35 venues (15%) represented by hotels with meeting facilities under private ownership (97.1%). This cluster offers the highest number of meeting rooms per venue and the greatest maximum capacity of congress hall per venue. This typology of sites characterizes the congress supply in the Mediterranean Rim countries and in Italy.

Table 1 – Breakdown of typologies of congress sites by country

	Multifunctional sites	Congress centers and auditoriums	Hotels	Total	Multifunctional sites	Congress centers and auditoriums	Hotels	Total
France	21	12	2	35	22.6%	11.4%	5.7%	15.0%
Germany	17	23	4	44	18.3%	21.9%	11.4%	18.9%
Spain	12	11	4	27	12.9%	10.5%	11.4%	11.6%
Italy	7	14	5	26	7.5%	13.3%	14.3%	11.2%
United Kingdom and Ireland	6	12	2	20	6.5%	11.4%	5.7%	8.6%
Scandinavian Countries	3	10	3	16	3.2%	9.5%	8.6%	6.9%
Benelux	3	4	2	9	3.2%	3.8%	5.7%	3.9%
Eastern Europe	11	9	4	24	11.8%	8.6%	11.4%	10.3%
Mediterraneam Rim	5	5	8	18	5.4%	4.8%	22.9%	7.7%
Austria	4	0	1	5	4.3%	0.0%	2.9%	2.1%
Switzerland	3	3	0	6	3.2%	2.9%	0.0%	2.6%
Other countries	1	2	0	3	1.1%	1.9%	0.0%	1.3%
Total	93	105	35	233	100.0%	100.0%	100.0%	100.0%

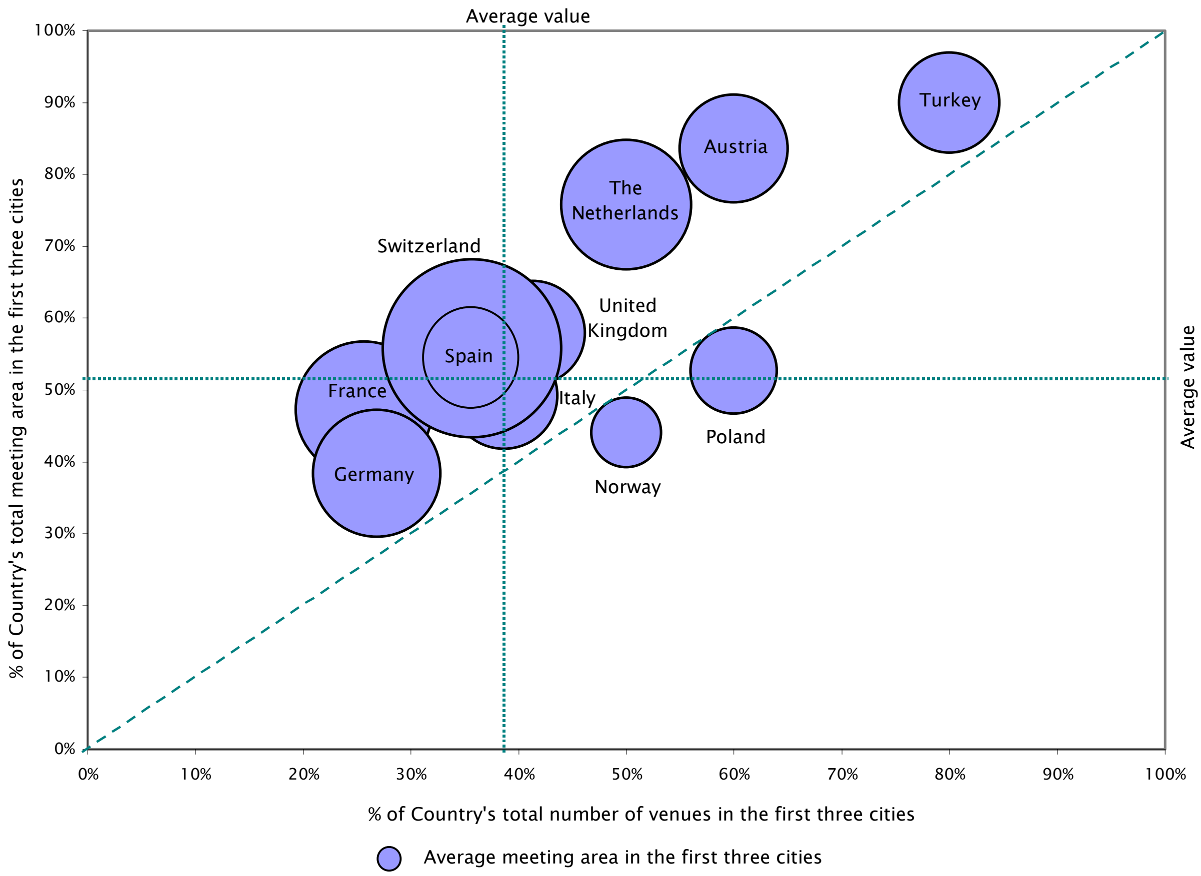
According to the analysis of congress venues' location, the cities with more than 10 venues are only 1.1% of total considered cities, while most of cities (68.8%) has only one venue (Table 2).

Table 2 – Number of cities according to the number of congress venues

	Cities		Meeting area (m^2)	
	N.	%	Total	Average per city
More of 10 venues	3	1.1%	945,730	315,243
From 9 to 5 venues	6	2.3%	890,842	148,474
4 venues	6	2.3%	587,583	97,931
3 venues	24	9.0%	1,023,572	42,649
2 venues	44	16.5%	1,223,726	27,812
1 venues	183	68.8%	1,769,727	9,671
Total	266	100.0%	6,441,180	24,215

With regard to the countries with 10 or more large conference venues the research shows a strong concentration of the number of venues and of the total meeting area in the first three cities (Fig. 2), especially in the capital city.

Figure 2 – Concentration of the number of venues and the total meeting area in the first three cities



Conclusions

The structural analysis of the largest conference venues in Europe shows a remarkable concentration in the first five countries (Germany, France, United Kingdom, Italy and Spain) with regard to (Tables 3-4 and Fig. 3):

- total number of venues (63.8%),
- total number of congress centers (73%),
- total number of rooms (63.2%),
- total number of auditoriums (74%),
- total meeting area (65.4%).

The same five countries have an overall high level of concentration of the congress supply in terms of number of cities with the largest conference venues (167 cities); France and Germany emerge with respectively 20.7% and 15.9% of the total.

Table 3 – Congress supply in the first five European countries

	Congress venues		Meeting area (m^2)		Total number of rooms					
	N.	%	Total	Average per venue	Multifunctional halls	Conference rooms	Meeting rooms	Auditoriums	Arenas	Total
Germany	82	18.3%	1,289,623	15,727	129	146	1.208	23	23	1,529
France	78	17.4%	1,096,670	14,060	114	96	954	61	14	1,239
United Kingdom	46	10.3%	492,147	10,699	57	38	548	35	12	690
Italy	44	9.8%	554,388	12,600	64	81	469	18	15	647
Spain	36	8.0%	587,893	16,330	57	68	506	37	6	674
Total Europe	448	100%	6,150,350	13,728	674	690	5.832	235	126	7,557

Figure 3 – Concentration of meeting area in Europe

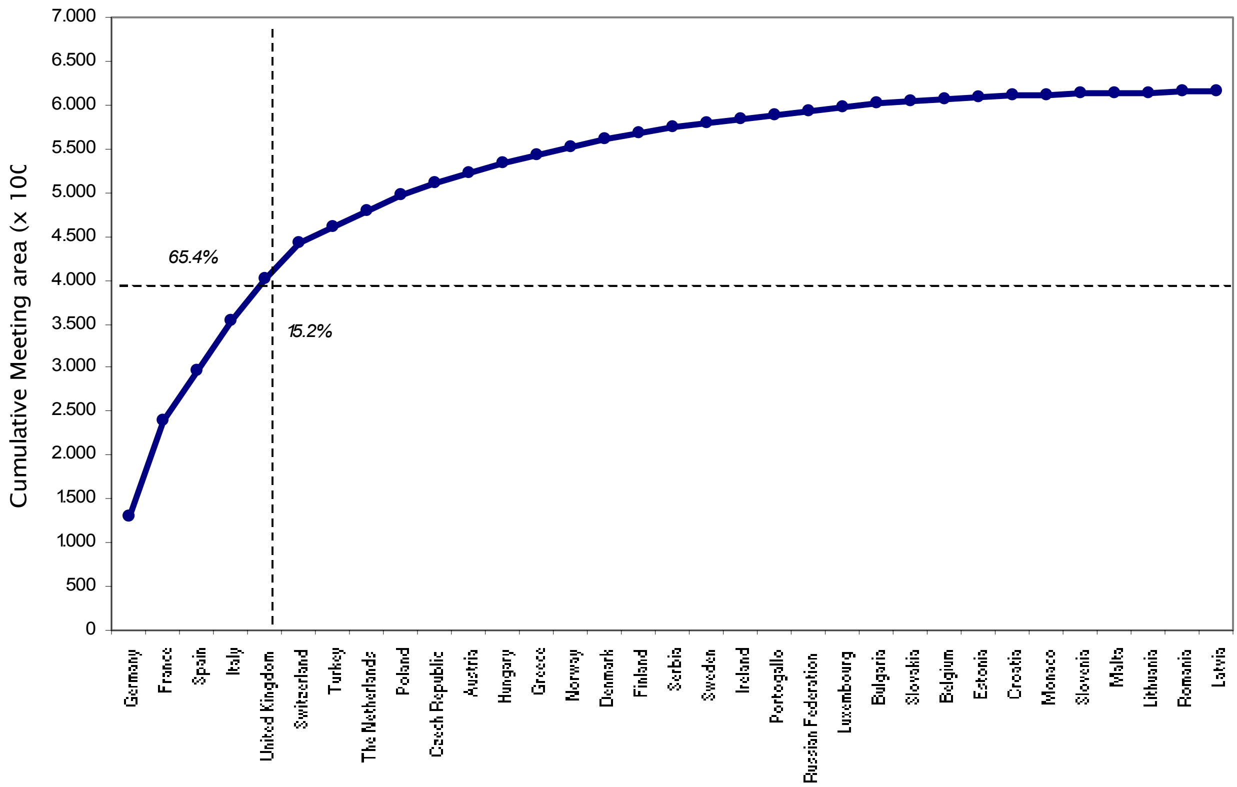


Table 4 – The typologies of congress venues in the first five European countries

	Exhibition and congress centers	Congress centers	Theaters and cultural centers	Arenas and sports centers	Hotels	Others	Total
Germany	32	26	0	17	5	2	82
France	51	13	1	10	2	1	78
United Kingdom	18	8	8	11	1	0	46
Italy	13	9	4	13	5	0	44
Spain	15	9	3	4	5	0	36
Total Europe	194	88	23	100	38	5	448

The level of concentration of the congress supply is very high with regard to cities too, because only five cities (Paris, Berlin, London, Madrid and Milan) represent 11.2% of total number of the largest European conference venues and 21.4% of total meeting area (Table 5 and Fig. 4).

Table 5 – The first five cities by total meeting area

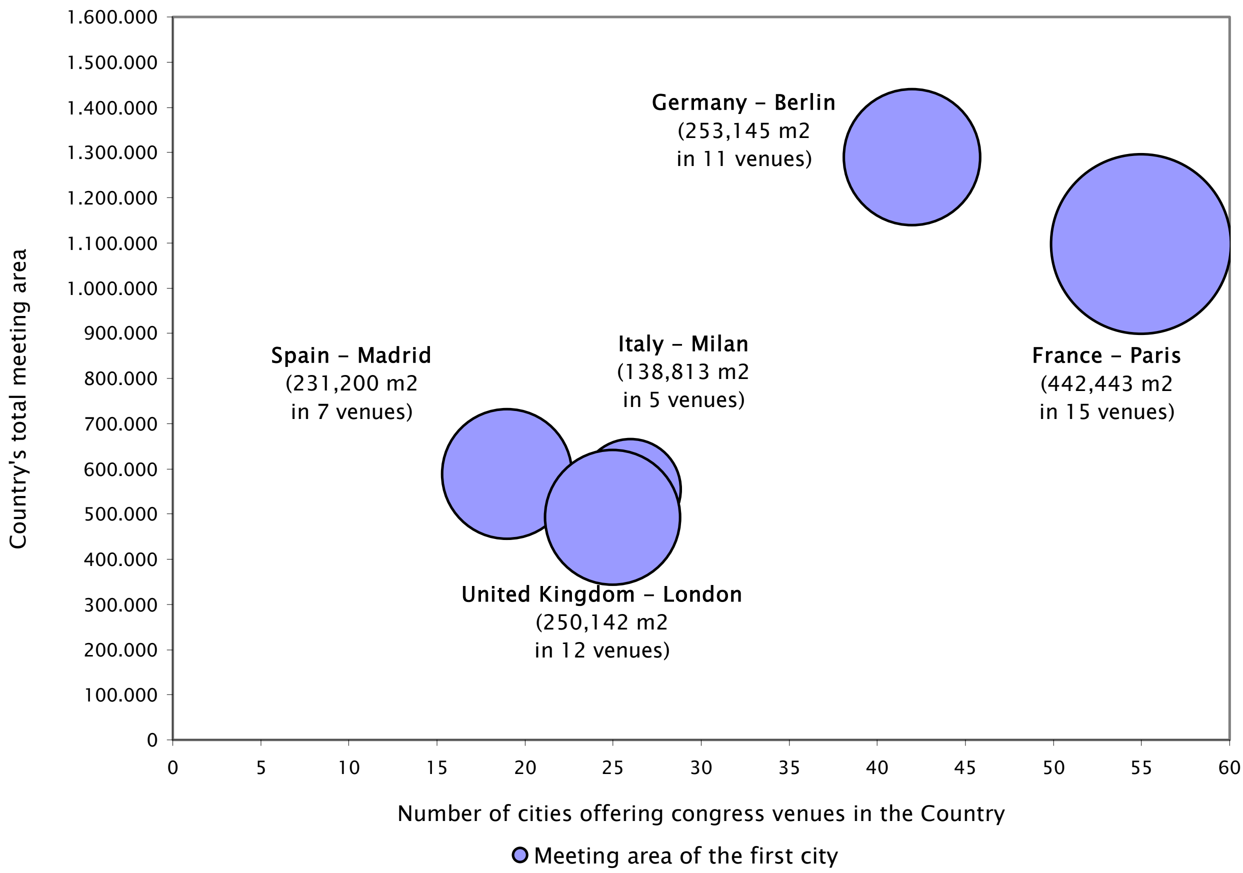
	Number of cities	First city	Number of venues	Total meeting area (m^2)
France	55	Paris	15	442,443
Germany	42	Berlin	11	253,145
United Kingdom	19	London	12	250,142
Spain	26	Madrid	7	231,200
Italy	25	Milan	5	138,813
Total Europe	266		448	6,150,350

In particular, among the top five European countries, the United Kingdom and Italy have the highest concentration of venues and total meeting area in the first three cities:

– London, Birmingham and Belfast account for an high percentage of congress supply in the United Kingdom (41.3% of number of venues and 57.9% of total meeting area); London in particular concentrates 26.1% of venues and 50.8% of total meeting area in the United Kingdom;

– Rome, Milan and Turin account for 38.6% of total number of the largest venues in Italy and 49.2% of total meeting area, with Rome accounting for 18.2% of venues, but only 16,4% of total meeting area in Italy, and Milan accounting for 25% of total meeting area even if it hosts only 11.4% of Italian venues.

Figure 4 – Concentration of congress supply in the main European countries



Research Lab on the International Meeting Industry (LAMCI) is an initiative developed in Italy by ASERI, *Postgraduate School of Economics and International Relations* of the *Università Cattolica del Sacro Cuore*, in collaboration with *Fiera Milano Congressi*