
Results MICE market monitor 2010 – IMEX presentation

tmf's annual survey on the German-speaking MICE market: Current market development, destination trends and marketing requirements

Understanding the situation and the mind of meetings' organisers in one of the most important markets - the 2010 mmm keeps track with the German, Austrian and Swiss outbound meetings' market.

tmf GmbH is a specialist in dialogue marketing for global MICE markets and offers assistance in market research, branding, successful strategies and all communication (sales, marketing and pr). tmf's delivery of all aspects of dialogue marketing is built on substantial market expertise paired with excellent databanks.

Since 2004 tmf GmbH carries out the mmm – MICE market monitor, a now well-established study offering representative data and professional insights into the most important developments of the German-speaking outbound market. With the findings of the mmm 2010 international tourist boards, convention bureaus, venues, hotels and other suppliers of MICE related products get the right information for amending their marketing strategies.

The 2010 mmm focusses on:

- General business development within the German-speaking MICE market
- Impact of the financial crisis
- Request for European and overseas destinations
- Destination rankings - past and current
- Outbound budgets
- Sources of information to select a destination
- Top and flop for successful fam trips
- Performance measurement of events
- Restrictions and legal issues

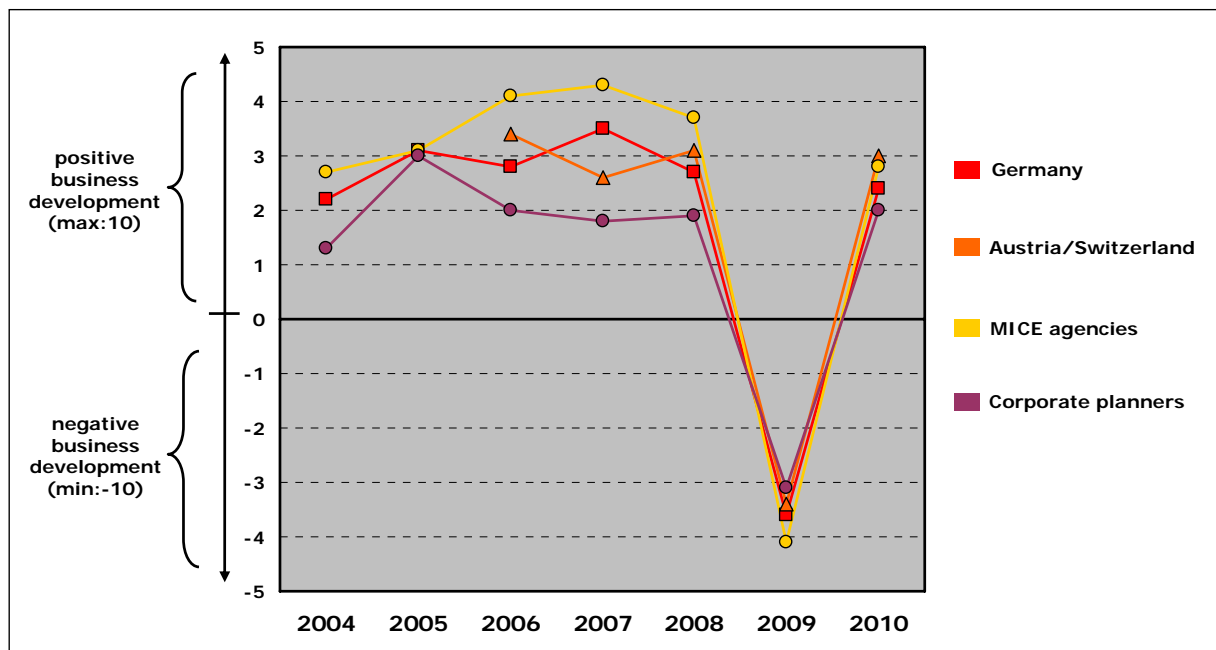
The approx. 440 participants in the survey are all known to carry out international MICE events and are planners from MICE agencies/intermediaries and from corporations in Germany and Austria/Switzerland,. As this year's mmm is a total population survey with a total response rate of 6%, results can be regarded as statistically representative for the German-speaking outbound MICE market. The benefit of reliable data about this important market segment is obvious for all involved in the planning and supplying for the MICE market. On the other hand planners will also benefit from improved service, tailored information and support through suppliers if better knowledge about their working patterns, needs and requests are known.

Has the crisis been overcome?

Due to the financial crisis in 2009 the MICE business experienced a serious setback in overall development. However, in 2010 a recovery to the level of before the crisis can be observed. Incentive travel still is affected the most, but not as strong as in 2009 and also on the way back to "normal". The bottom of the valley was reached in spring 2009, where nearly half of the buyers had claimed a negative impact of the financial crisis on their MICE business. Now a third of the buyers sees their situation as rather positive and unaffected by the crisis.

Index "Current Business Development"

("How will the order situation this year develop (MICE agencies)/ How is your status of plans this year (corporate planners) in comparison to last year?")



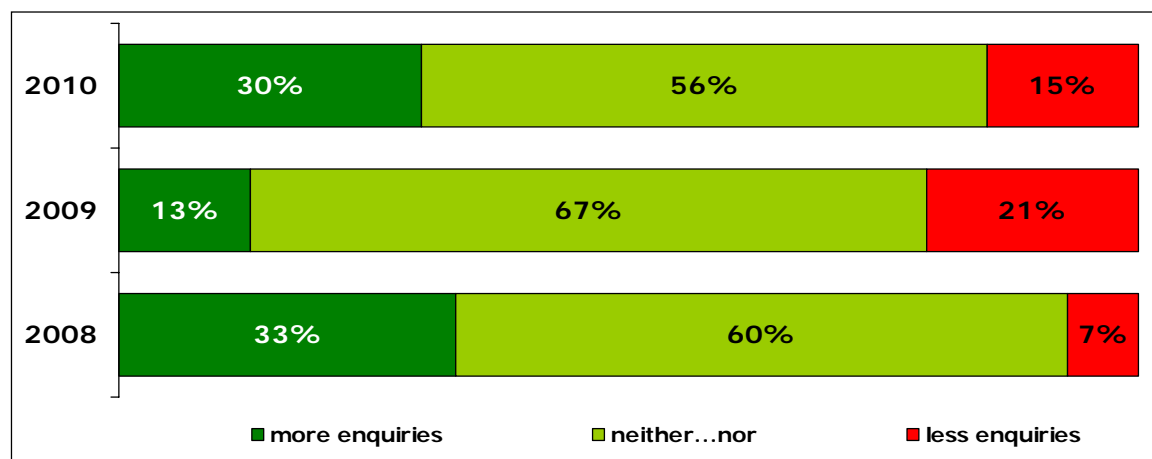
(2010: n=436; 2009: n=438; 2008: n=529)

European destinations remain popular

The overall market recovery of the MICE industry becomes apparent by looking at the demand for European destinations increasing again this year and almost reaching the pre-crisis level of 2008. In accordance with general market trends to shorter distances and less time for events, the demand for longhaul destinations is still not at the level as before 2009 but has also caught up compared to the previous year 2009.

Index: "Demand for European destinations - current year"

("How strong is the demand for European destinations in this year?" (in comparison to last year))



(2010: n=434; 2009: n=435; 2008: n=529)

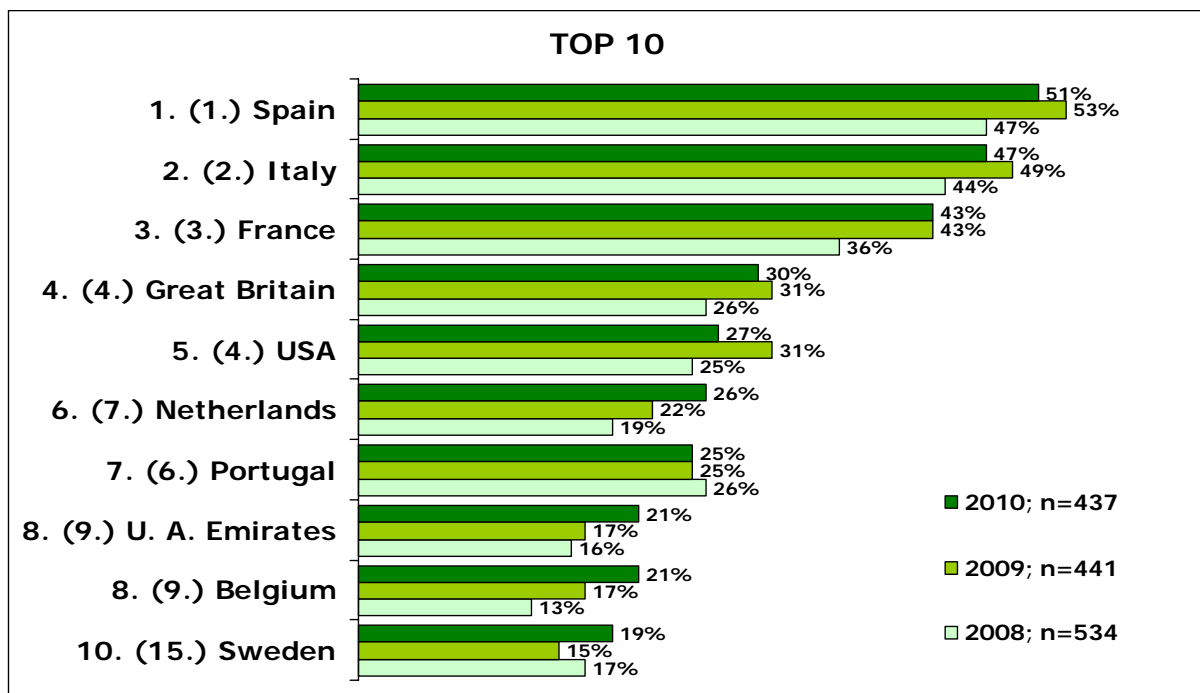
Preferred destinations: some top players and some catching up

The top destinations for the German-speaking outbound MICE market are again Spain, Italy and France. About half of the MICE organisers have carried out events in these three countries within the last three years. Other strong destinations for the market are Great Britain, the USA, the Netherlands and Portugal. Especially the Netherlands, the United Arab Emirates, Belgium and Sweden record a growth of some percentage points in popularity. All of them with the exception of the UAEmirates are not far from Germany, Austria and Switzerland and profit from the direct and/or short travel connections. Both, a good accessibility and a short travel time, count a lot in the present MICE business.

The market shares of about **50 outbound destinations**, selected by German-speaking planners in 2010 - are shown in the report.

“Ranking of favorite destinations – past 3 years”

(“In which countries did your events take place in the last 3 years?”)



(ranks of 2009 in brackets)

Conclusions

The outbound German-speaking MICE market is shifting back to it’s pre-crisis volume and meaning for international suppliers and destinations. A truly global scenario of the marketplace with regards to the origin of clients and business handled by German-speaking organizers requires high focus and updated skills of suppliers. In particular for the marketing of destinations it is essential to know how to reach out and identify those target groups and event categories that are established in the marketing strategies.

Competition among suppliers in the German-speaking market continues to increase – and the market itself gets more complex and challenging to work with. If a product presented to this market wants to be successful and goal-driven in sales, marketing and PR, a very considered and professional approach is needed.

tmf GmbH is encouraging all leading destinations and suppliers to engage themselves in this research by becoming sponsors of the project and advisors in our discussions, so we jointly will be able to get the full picture of new aspects and future tasks to comply with

in this challenging marketplace. The unique expertise of this research will help achieving goals.

mmm 2010 by tmf GmbH, with support of IMEX Frankfurt



We hereby acknowledge the support of the sponsors of the 2010 research:

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