



MICE market  
monitor | 08



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## 5 years MMM - MICE market monitor

### 5<sup>th</sup> survey on German-speaking MICE market breaks participation record and reveals important changes in destination trends!

Dry statistics? Mais non – if you want or need to know the latest trends for destinations, discover the needs and demands of German-speaking MICE buyers and find out how latest trends in the industry are influencing their decision making process – the MICE market monitor 08 is a must! For the 5<sup>th</sup> ongoing year the MICE destination marketing specialist tmf GmbH has conducted the MMM – MICE market monitor. The annual MMM is supported by IMEX Frankfurt and points out the trends and developments in the German-speaking outbound MICE market.

The successful market research project was initiated by tmf GmbH and IMEX in 2004 and is carried out each year since then. The monitor offers useful and comparative facts and figures about the developments and trends in the German-speaking outbound MICE market. In the study's fifth year a record number of decision makers answered the questionnaire. The interviewees - more than 500 MICE agencies and corporate planners – are all carefully selected and are known to carry out international MICE events. The monitor offers representative data and professional insights into one of the most important source markets for MICE business and thus supports international tourist boards, convention bureaus, venues, hotels and other suppliers of MICE related products in their decision making process.

All MMM results are looking both into the views of MICE agencies and corporate planners and into the source markets of Germany and Austria/Switzerland (treated as one market). Easy-to-read charts and English language help the international MICE community to use the data for their internal purposes. Annual indices provide easy overviews. An outlook into future developments helps international marketing strategists. The newly created indices enable a better overview on key trends and facilitate the comparison between the years since 2004.

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### In addition to the regular information on key issues such as ...

- Business mood and perception in the market
- Request for European and overseas destinations (ranking, trends, etc.)
- Hitlist of destinations past and future
- New trends for destinations
- 2008 focus: the regions UK/Scotland/Ireland, Scandinavia, Baltic States, their preferred destinations, types of events, seasons and "hot spots"
- Market structure and working patterns (origin of participants, shifting of event planning towards subsidiaries, budgets of MICE organisers etc.)
- Corporate Social Responsibility: relevance of CSR for MICE planners and suppliers, current requirements and requested services

The monitor highlights a different focus every year – in 2008 the MMM looks into the relevance of destinations in UK/Scotland/Ireland, Scandinavia and Baltic States for meeting and incentive planners from the German-speaking markets and the growing influence of Corporate Social Responsibility (CSR) issues on the planning of events.

With the feedback of over 400 interviews from Germany and over 100 from Austria/Switzerland, the survey was further upgraded and expanded. The high number of participants allows a unique analysis of the market scenario – German-speaking planners have been very co-operative and supportive to tmf in the findings. The benefit of reliable data about this important market segment is obvious for all involved in the planning and supplying for MICE. Planners will benefit from improved service, tailored information and support if better knowledge about their working patterns, needs and requests are known. Suppliers find assistance for their product shaping. The target is a continuous improvement for the partnership between destination marketing bodies and the clients in the market – one of the core issues in the daily work of tmf GmbH.

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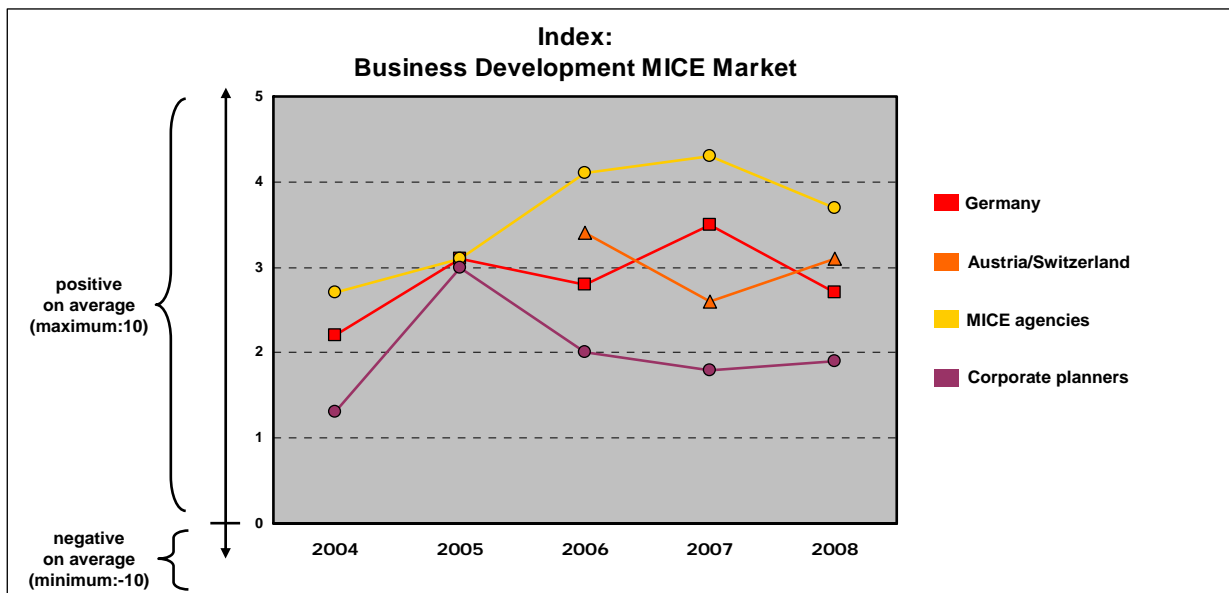


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Some samples of results can give you an idea of the contents:

### Business development for outbound corporate events – potential of the German-speaking MICE markets remains huge

According to the MMM 08 the overall positive development of the previous years further continues and consolidates on a high level. About 90% of the MICE planners in the German-speaking countries report a constant or an even higher demand for MICE events in 2008 compared to 2007. The index shows the positive business development and the high potential of the German-speaking outbound markets for international destinations and suppliers.



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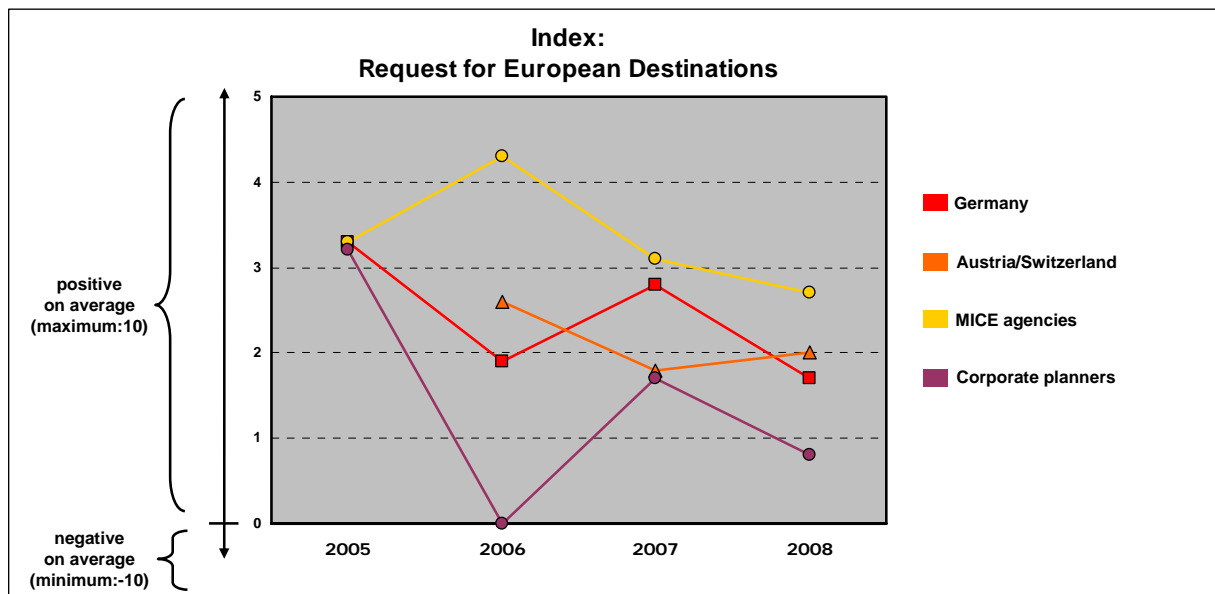
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## Request for European destinations

The massive use of European destinations from the German-speaking source market is in accordance with the general market trends for shorter length of stays and direct airlinks - and with the fact that the companies want to use their time available for events in an optimal way. The demand is huge, the trends for the destinations are changing from year to year in waves and need to be monitored. Proper marketing, presence in the relevant media and a product/destination presentation in accordance with the lifestyle trends help branding, re-launching or generally raising interest amongst a highly competitive planning community. The demand for European destinations has been monitored over the last four years and is shown in the index below.



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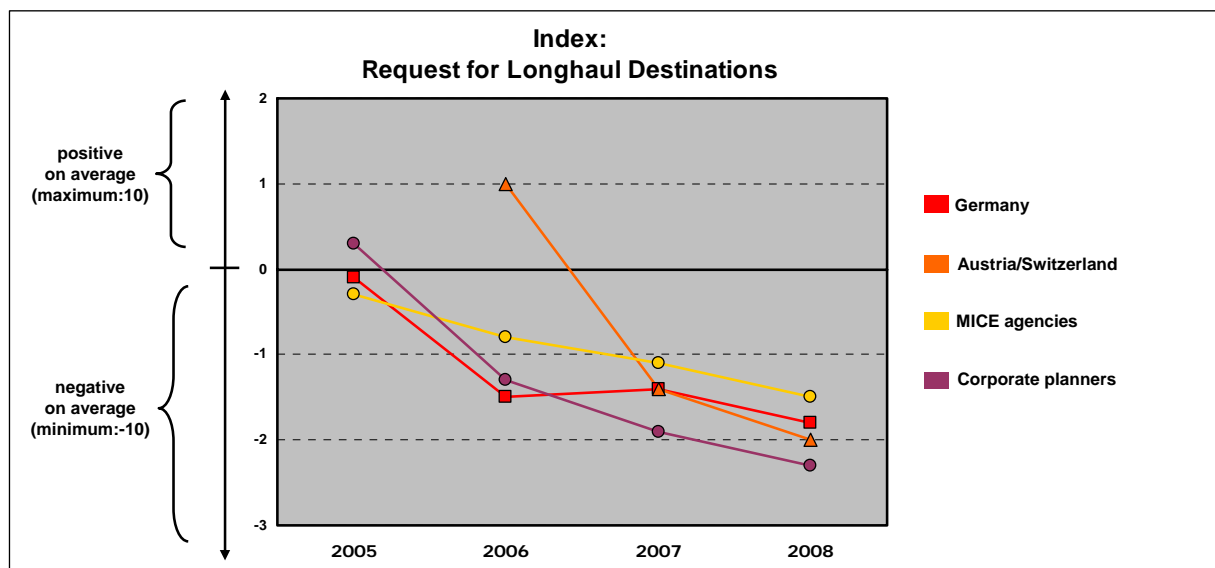
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## Request for long-haul destinations

The third index of the MMM shows the development of the demand for long-haul destinations. In accordance with the overall trend for shorter stays the use of longhaul destinations is slightly decreasing continuously over the last years. Besides the tendency for shorter and faster events, another reason for the decrease can in parts be seen in the de-centralisation of event planning in globally acting companies. But also here in the long-haul segment we see 2 destinations continuously picking up - the newcomers China (2008: 5%, 2007: 3%) and India (2008: 3%, 2007: 2%) are gaining shares and need special attention! The market share for long-haul is definitely worth marketing efforts – 14 % of the survey participants report an increasing request for long-haul destinations in 2008. The percentage of the overall share of the market for longhaul MICE might look small at first sight, but considering the massiveness of the total market potential we talk about a significant number of events going into overseas destinations. China, India and other Asian destinations are mentioned frequently but there are some surprises to be found for the use of other continents.



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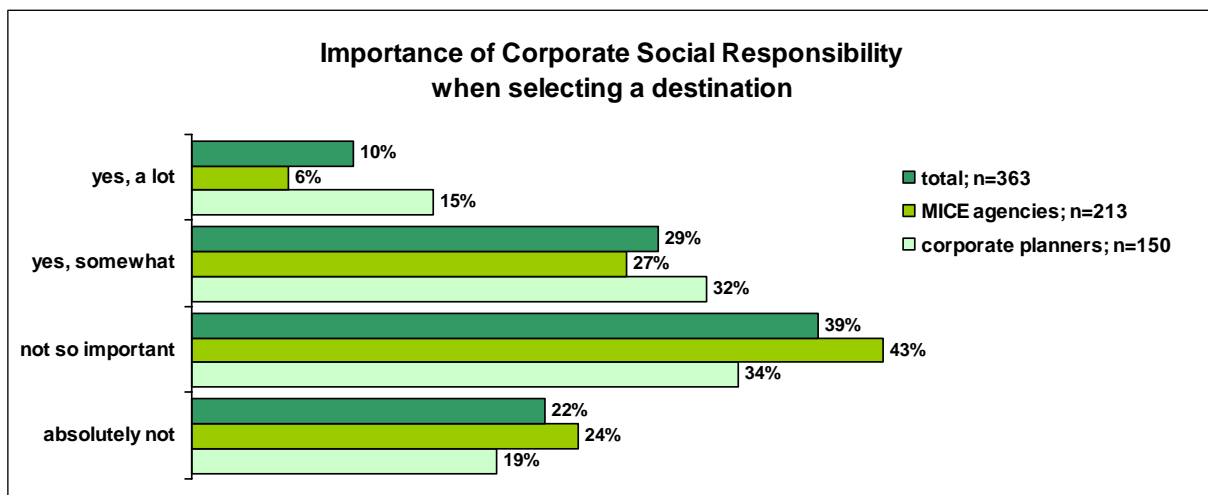


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## Special topic – Corporate Social Responsibility (CSR)

One of the MMM 2008 focus questions has been the influence of the CSR on business decisions in our marketplace. The term of CSR stands for the acceptance of responsibility by the economic players in social, environmental and economic aspects.

Being a buzz word and an area discussed by everybody we think it is essential to watch the market carefully, but also to distinguish between the different understandings of the term. Suppliers need attention to the subject – a trend for more purpose in business life is strongly visible in the German and German-speaking society, going hand-in-hand with the overall growing awareness for environmental and social matters – however costs are a major issue here at the moment. Creativity and understanding of the subject is needed – vision and personal attitude can only help the matter! The second focus field of the MMM 08 is on several European destinations and trends amongst cities and places there – we look into UK/Scotland/Ireland, Scandinavia and the Baltic States.



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## A thriving and fast-changing marketplace

The MMM 08 is ideally used in combination with last year's issue, where the focus was on **best practice for marketing and sales** and on the **expectations of buyers regarding famtrips and sales calls** – some of the most favourable marketing tools used to convince buyers. A favourable combination rate is available.

Both the data collected through questionnaires as well as the personal discussions with industry experts reveal surprises as well as confirm established developments. tmf wants to share those information with all colleagues being responsible for marketing decisions in the German-speaking market. The scenario is hugely competitive, it is important to stay focussed and give buyers what they really need. The mood is not in favour of getting out more and more information but rather to pick very carefully what works and what does not. Marketing efforts from the side of the destinations need to be more strategic, better co-ordinated and with consideration in order to avoid an "overkill" of different suppliers roaming in the market – tmf and other service providers in the marketplace will be happy to assist with advise here.

The MMM – MICE market monitor 08 is printed in English language and can be ordered directly at tmf GmbH. Please contact Johanna Fischer of tmf GmbH at phone 0049 – (0)89 – 330 567 60 or [j.fischer@tmf-gmbh.de](mailto:j.fischer@tmf-gmbh.de) for any further information.

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