



TRAVEL MARKETING FACTORY GMBH

TMF GmbH/IMEX Study 2005

**- current trends in the German outbound conference and
incentive market**

Johanna Fischer

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**stands for professional all-level Tourism & MICE
Marketing in the German speaking markets**

**TMF GmbH is a strategic partner for IMEX since
2003, running the advisory Marketing Clinic
at the show**

Companies founded:

TMF GmbH 1993
Piranha Presse & PR GmbH 2000
Work and Network GmbH 2003



Owners and Managing

Directors:
Johanna Fischer
Alfred Fischer

Travel Marketing Factory GmbH

- Complete representation of Tourist Boards and Convention Bureaus
- Data bank services
- Market research and monitoring
- Professional telemarketing/telesales for special segments/ sales support activities
- Directmarketing (faxmailing, emailing, etc.)
- Elaboration of individual marketing concepts
- Organisation of events und roadshows
- Representation on tradeshows
- Consulting services



Work and Network GmbH

- Complete representation services for convention centres, hotels and DMC's (Destination Management Companies) in the German speaking markets
- Individual marketing projects
- Data bank services
- Direct marketing (faxmailing, emailing, etc.)
- Organisation of sales visits

Piranha Presse & PR GmbH

- Press services (PR contact for journalists)
- Data bank services (targeted press mailings and information services)
- PR conceptional consulting (elaboration of individual concepts)
- Text work (research and elaboration of texts)
- Organisation of press events (press conferences, press fam trips)
- Controlling/Reporting (writing of monthlyreports, calculation of media value on the basis of press clippings)
- Crisis-PR (communication of unforeseen occurences)

Tourism & MICE related representation of national and regional Tourism Boards and Convention Bureaus

Professional marketing and representation of congress centres, hotels and DMC's (Destination Management Companies)

Full range of press & PR services for Tourism & MICE



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Available Databanks at TMF GmbH

- MICE agents
- Corporate planners all industries
- PCO's
- Special interest tour operators and travel agents
- All major tour operators in the German speaking market
- Travel agents in the German speaking market

Other countries of operation: Spain, Benelux, Italy, France



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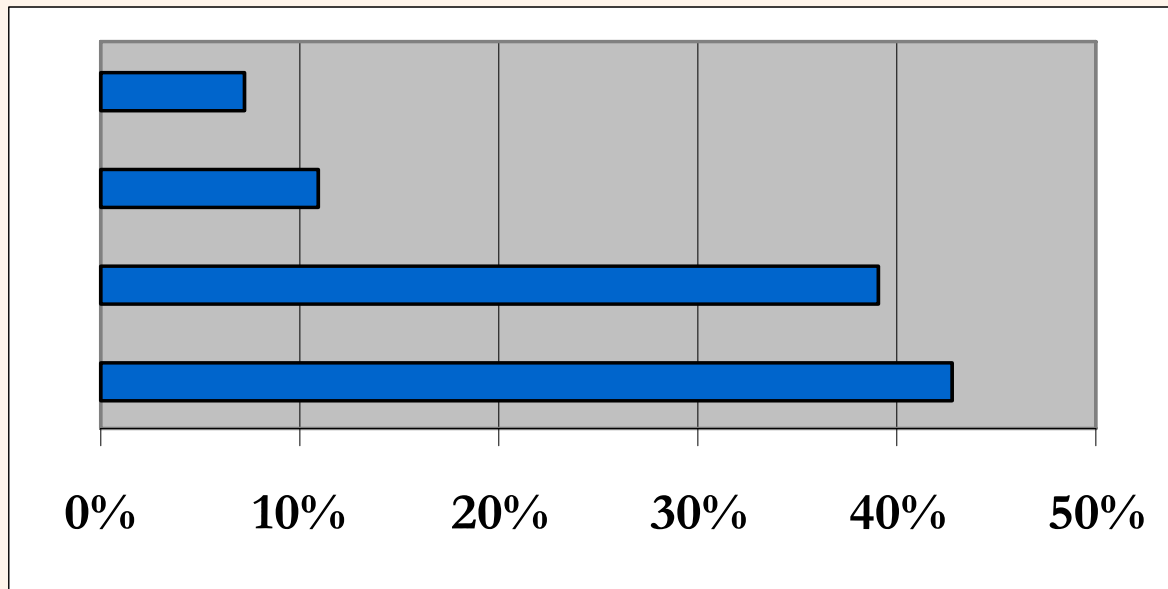
TMF/IMEX Study 2005 – Current trends in the German outbound conference and incentive market

- **54 corporate planners and 64 MICE agents –
118 interviews in total, split up in:
 55 VIP Group (detailed telephone interviews)
 5 Focus Group (personal interviews)**
- **First Study run in 2004 – to be continued in the future**



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Type of MICE agents represented in the study:



Tour operators/ travel agencies specialised in meetings & incentives

Professional Congress Organisers

Full service incentive houses

Event- & advertising agencies

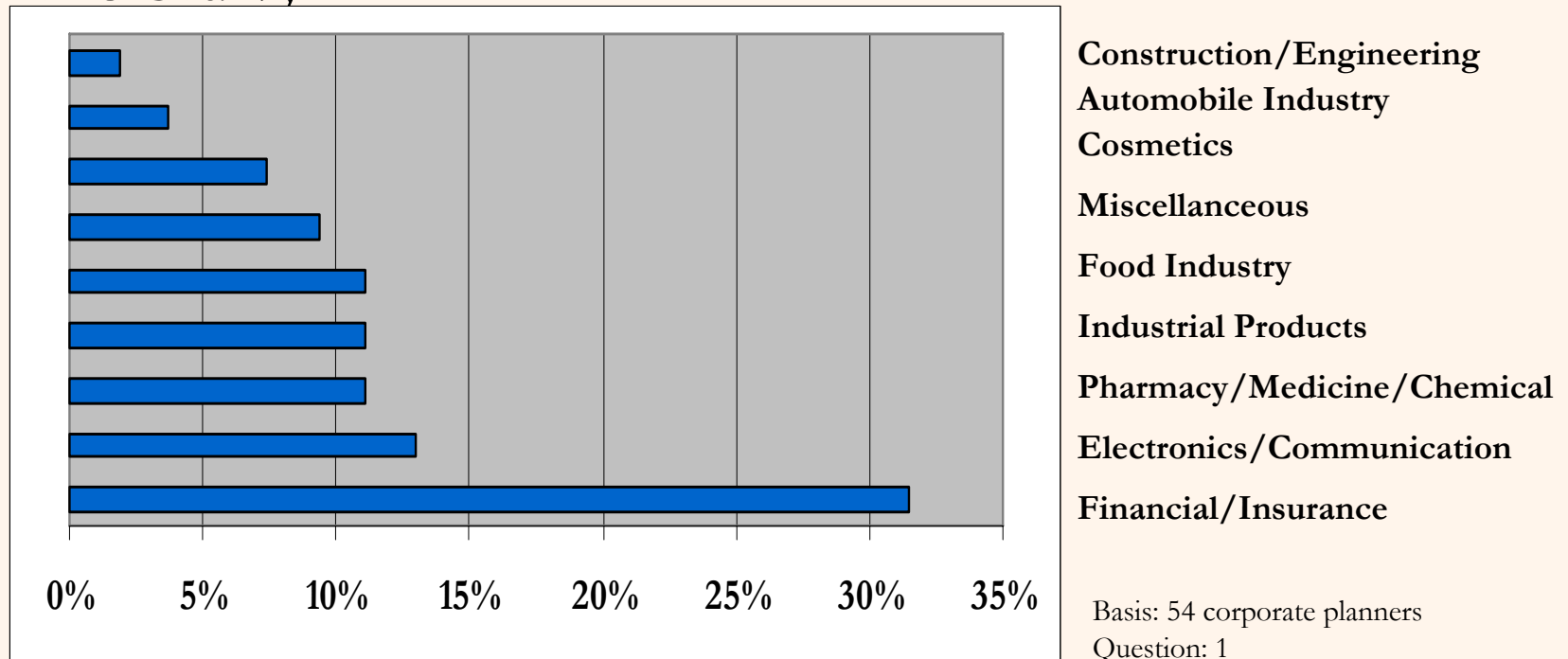
Basis: 64 MICE agents

Question: 1



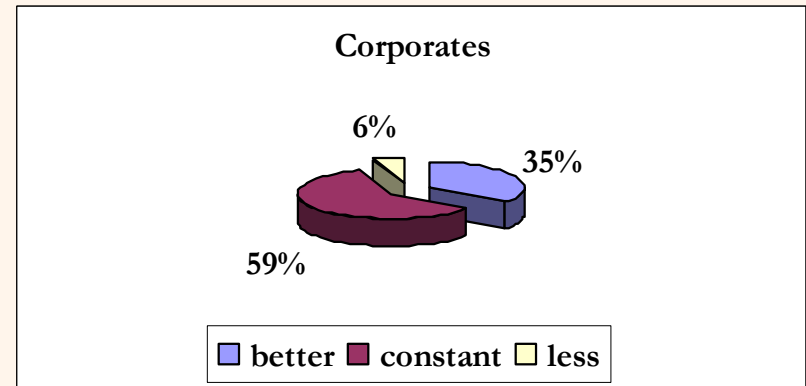
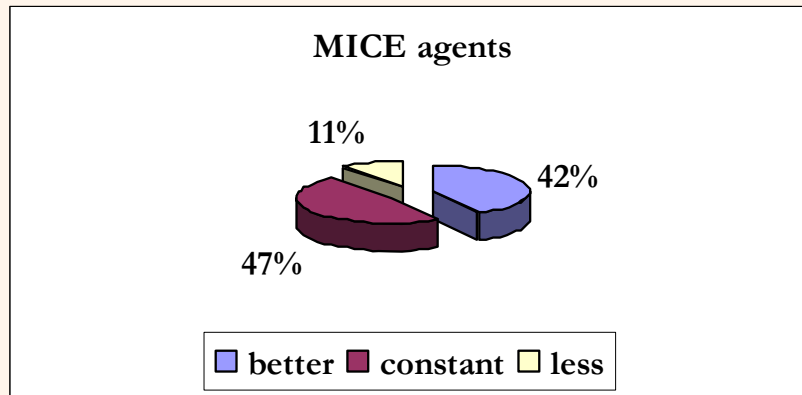
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Corporate planners by industries represented in the study





How is the situation of your actual business for meetings and incentives in 2005 compared to 2004?



- **One third of the corporates and more than 40% of the MICE agents report an improvement of their business situation for 2005**
- **89% of the MICE agents and 94% of the corporate planners say that their business is same or better in 2005 compared to 2004**



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Same question, compared to the results of the study 2004 - how is the situation of your actual business for meetings and incentives compared to previous year?

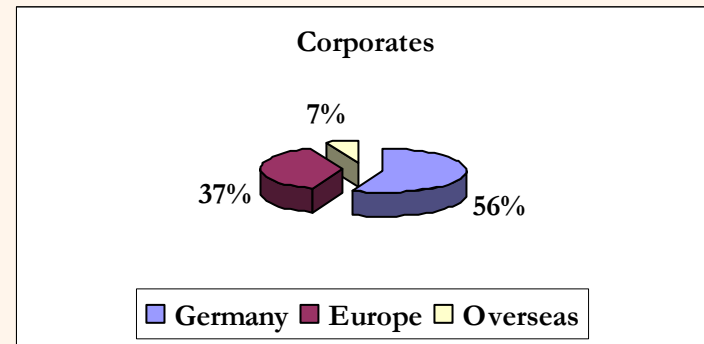
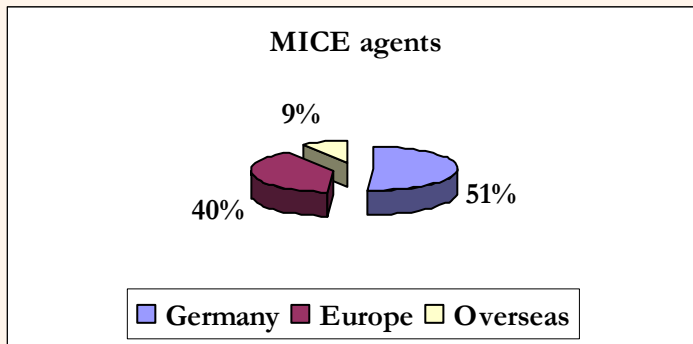
- corporates 2005: 35% have better business (since 2004)
- corporates 2004: 26% have better business (since 2003)

- MICE agents 2005: 42% have better business (since 2004)
- MICE agents 2004: 40% have better business (since 2003)





Amount of your events in Germany, Europe and Overseas in 2005



- Around 4 out of 10 events take place in Europe in 2005
- Share of longhaul destinations in 2005:
 - 7% amongst the corporates
 - 9% amongst the MICE agents



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Same question, comparing the results of 2004 and 2005 - amount of events in Germany, Europe and Overseas

- Demand for European destinations

2004:

MICE agents 28%

Corporates 25%

2005:

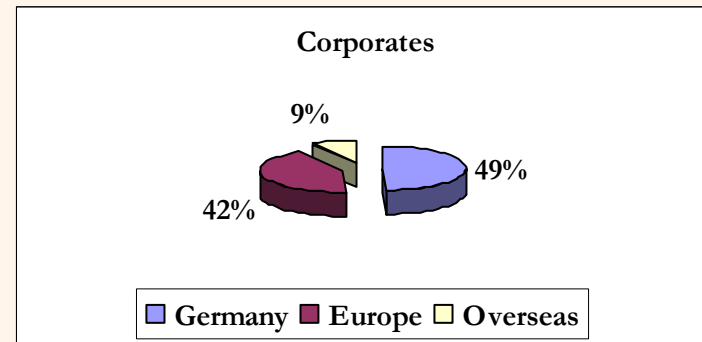
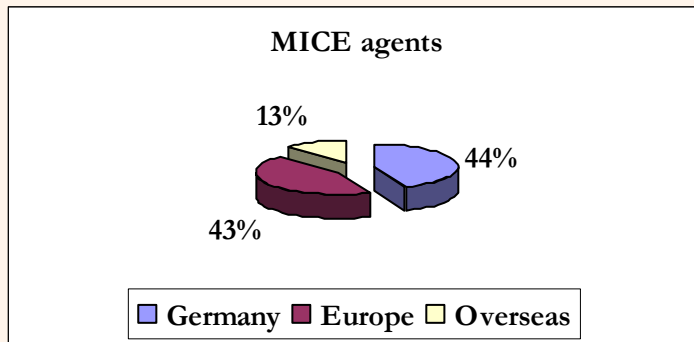
MICE agents 40%

Corporates 37%

Median results
Question: 3



Percentage of turnover (budgets!) for events in Germany, Europe and Overseas



More than 40% of the total turnover of the interviewees refers to events in Europe, which is more or less equivalent to the share of turnover for events in Germany, despite more events taking place in Germany



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Further information can be obtained from the TMF/IMEX Study 2005 about:

- General demand for longhaul destinations in comparison to 2004
- Trends amongst long-haul destinations

- General demand for European destinations in comparison to 2004
- Trends amongst European destinations



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Preferred sources of information (more choices in the study)

MICE agents

Fam Trips

Events already took place

Recommendation of colleagues

Information at exhibitions

Roadshows and presentations

Corporates

Fam Trips

Information at exhibitions

Recommendation of colleagues

Roadshows and presentations

Trade Press



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Foresight: Estimation of development of incentives and conferences abroad in the next 2-3 years (agents – visible trends)

- 60% of the MICE agents see an **increase** of conferences and incentives **abroad** in the next years
- In 2004 it was only 34% with the same anticipation



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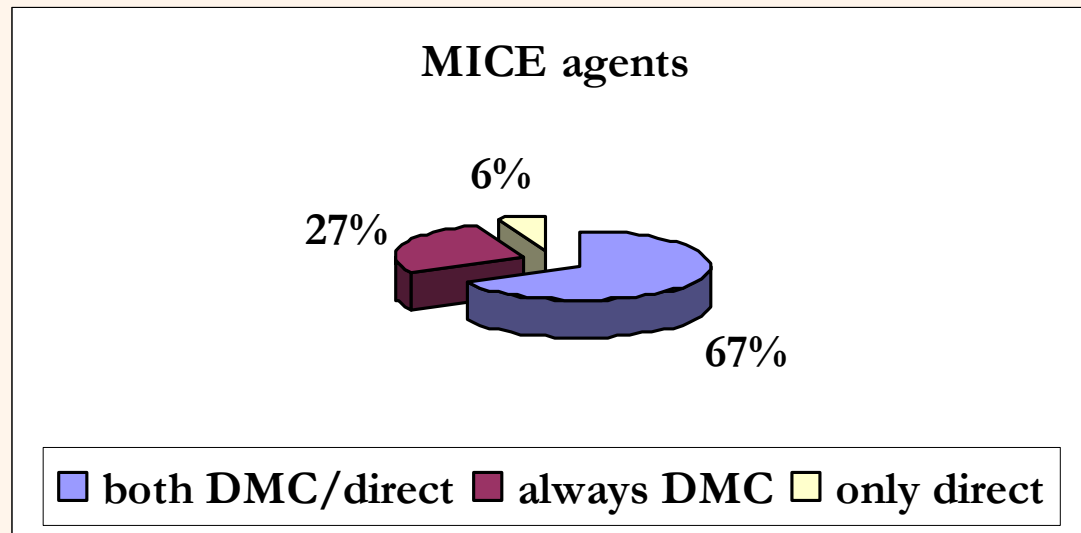
Corporate planners: use of incentive houses

- **Similar to 2004 around 61% of the interviewed corporate planners use a German incentive house**



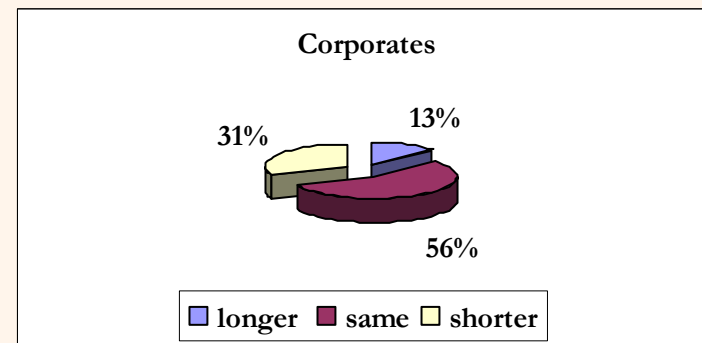
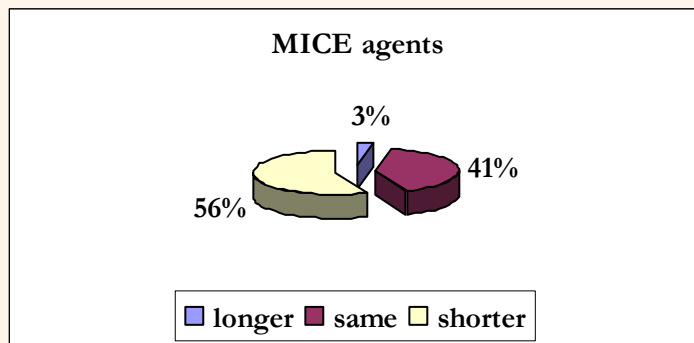
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MICE agents: use of DMC's





Has the planning period changed compared to previous years?



- The trend goes continuously to shorter planning periods as it is visible since a few years



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Further reasons for the selection of a destination

- **Access**
- **Facilities have a high standard**
- **High professional standards**
- **Value for money**
- **Destination is politically safe**



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Decision makers in German corporations, departments i.e.:

- Staff development
- Public and brand communication
- Seminar organising or educational units
- Purchasing dept. (for hotel negotiations)
- Distribution and Sales
- PR departments



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Trends for incentive travel:

- Always include meetings
- Always in line with targets of the department in charge
- Incentives are presently mainly used to increase sales, other motivational aspects are less important



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Trends for conferences and meetings:

- Rates are crucial
- Accessibility
- Daylight facilities
- Min. 4 Star hotels
- Shorter conferences



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Johanna Fischer
Managing Director
Munich, May 2005