

## How international decision-makers view Germany as a destination for meetings and incentive travel

(Note: comparative figures for an August 2005 poll are italicised and included in brackets)

### 1. Background

- 43% (61%) of replies were from men; 57% (39%) from women
- Replies were received from MICE buyers in 18 countries: 12 in Europe and Scandinavia; plus China, India, South Africa, USA, Russia and Ukraine
- The five most mentioned job titles of respondents are: Executive Vice-President; Project Manager; Conference and Events Manager; Chairman; Meeting Planner
- The range of job descriptions of respondents includes (top five): conference placement agency; PCO; DMC; business travel agent; marketing communications
- Of the buyers a total of 46% (34%) organise up to 10 international events annually; 34% (52%) organise from 11-50 events; and 20% (14%) organise over 50 events a year. On average, around 8% - 10% (10% - 15%) of these international events were staged in Germany.

### 2. (i) Which German destinations are ranked highest for meetings and training events by international buyers?

In order (2006): Berlin; Munich; Frankfurt; Hamburg; Dusseldorf; Cologne

*In order (2005): Frankfurt; Berlin; Munich; Hamburg; Dresden; Cologne*

### (ii) Which German destinations are ranked highest for incentive travel and corporate hospitality by international buyers?

In order (2006): Berlin; Munich; Cologne; Frankfurt; Hamburg; Dusseldorf

*In order (2005): Berlin; Frankfurt; Munich; Cologne; Hamburg; Dusseldorf*

### 3. Which other smaller, or less well known cities/destinations in Germany are favourites among international organisers?

The 10 mentioned most often are (alphabetical): Baden-Baden; Bonn; Essen; Freiburg; Heidelberg; Krefeld; Lubeck; Potsdam; Trier; Wurzburg.

(Note: Also recommended are Aachen; Augsburg; Dortmund; Duisburg; Garmisch; Petersberg; Rothenburg ob der Tauber)

**4. (i) In what ways do international buyers consider that business tourism destinations in Germany are superior to those in other countries in Europe?**

The 10 most frequently mentioned factors are:

- Well organised, efficient, and punctual
- Quality of public services
- Multi-cultural and tolerant society
- Reputation as a business-oriented destination
- Experience
- Reliability of transport
- Major airports
- International outlook
- Professionalism of destination marketers and PCOs
- Technical know-how

**(ii) In what ways do international buyers consider that business tourism destinations/venues in Germany can learn from the standards and services offered in other countries in Europe?**

The 10 most frequently mentioned are:

- More competitive pricing/better price-quality ratio
- Be more friendly and better mannered
- More glamour needed
- Added creativity and flair required in incentive programmes
- Better, more international cuisine, and improved restaurant service
- Can be boring compared to 'gorgeous' countries like France, Italy or Spain
- Need for more congress centres at lower prices

- Poor regional airport structure
- Growing image as an expensive destination
- Enhance language skills: English needs to be more/better spoken; and French more widely spoken

**5. (i) According to international buyers, what is the most important message to communicate when marketing Germany for business tourism: that the country has old-fashioned charm and hospitality; or is characterised by high-tech efficiency?**

- 54% (61%) say: 'concentrate on charm'
- 39% (26%) say: 'highlight the high-tech efficiency'
- 7% (13%) say: 'it's best to promote both'

**(ii) Typical comments:**

- 'Focus on high-tech because business trips are short and charm is time-wasting'
- 'Charm is the key to repeat business'
- 'High-tech efficiency adds to the image of Germany as a quality destination'
- 'Protect and promote your charm – try not to go for the American copy-cat culture of offering standardised facilities'
- 'If there is no charm, no-one will care about high-tech'
- 'You need to emphasise both to stay competitive'
- 'High-tech for meetings. and charm for incentives'

**6. Which other countries in Europe, or within reach, represent the biggest threat to the continued success of inbound business tourism to Germany, and why?**

Replies included:

- Central European cities (e.g. Budapest or Prague) because they offer better value
- Baltic countries – novel experiences, and cheaper
- 'Sexier' cities like Amsterdam, Barcelona, Paris, Rome
- Southern Europe countries – for weather
- France and UK – because of their aggressive destination marketing

- France – for its food, wine, and regional cooking traditions
- Austria and Switzerland – for their superior hospitality values

**7. Did staging the World Cup help improve the international image of Germany as a destination for business tourism?**

(i) 36% answered no; 64% replied yes

(ii) Typical comments are:

- \* 'Yes, because it confirmed the country's reputation as an efficient and well-run destination'
- \* 'Yes, people could 'taste' Germany from the media coverage'
- \* 'The best advertising ever'
- \* 'No, because the emphasis was not on MICE tourism and it was viewed by the wrong audience'
- \* 'Yes – it highlighted so many positive things about Germany: good organisation, sport, image, human success ....'
- \* 'Yes – it showed the personal qualities of Germany and not just the standards of high-technology'
- \* 'No – because Germany is already well-known as a serious and well-established MICE destination'
- \* **'Yes – it added to Germany's reputation as ruthlessly efficient, but also as a more hospitable destination'**

Ends.