**How German and international buyers view meetings and incentive travel options in Germany – 2008**

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*Germany's premier meetings and incentive travel cities of Berlin, Frankfurt, Hamburg and Munich are being challenged harder by other top 10 MICE destinations in the country, as well as by emerging smaller centres that are winning a bigger share both of domestic and international demand. This is a key finding in the 2008 IMEX exhibition poll examining buyer attitudes towards Germany. The research attracted over 150 replies from overseas (10 European and Scandinavian countries; plus others in Australia, Brazil, Canada, China, Dubai, India, Mexico, Pakistan, Turkey and Vietnam); together with a further 110 specialists based in Germany. Participants typically are senior figures within the industry with job titles including: executive secretary, professor; managing director; pco; dmc; executive VP; chief administrative officer; key account director; owner; international development director; purchasing manager; and congress division director. Characteristic areas of work include: venue research; incentive planning; association management; destination selection; programme buying; integrated marketing for events; teambuilding; and global online marketing.*

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**top destinations**

International buyers have sprung several surprises this year in their ranking of favoured destinations in Germany. First, they have voted Dresden as their number one incentive option (replacing Munich, the top 2007 selection), with Cologne second, followed by Berlin and Munich; and for meetings their preferred hierarchy is Hamburg, Dresden, Frankfurt and Berlin (compared to the order of Frankfurt, Berlin, Munich in 2007). Second, the gap between the premier cities and the next category has significantly lessened, with prominence for incentive appeal now also offered (in sequence) to Dusseldorf, Leipzig, Nuremberg, Stuttgart and Hannover; and within the meetings market to Hannover, Dusseldorf, Leipzig, Stuttgart and Nuremberg.

Similarly German buyers have confounded previous patterns by replacing the 2007 incentive travel sequence (Berlin/Hamburg/Munich/Dresden) with Dresden, Cologne, Hamburg and Berlin; and the meetings sector line-up last year of Berlin/Frankfurt/Munich/Hamburg by Dusseldorf/Frankfurt/Dresden/Stuttgart.

What is also noticeable in 2008 is the greater prominence and extra awareness associated with so-called 'less well-known' MICE destination. The international and German buyers jointly identified a record 30 locations, namely (alphabetical order): Bad Neuenahr; Bad Reichenhall; Baden-Baden; Bamberg; Bavaria; the Black Forest region; Bonn; Bremen; Erfurt; Essen; Freiburg; Heidelberg; Ingolstadt; Kassel; Leipzig; Lubeck; Mainz; Mannheim; Passau; Potsdam; Regensburg; Rheingau; Rostock; Rottenburg ob der Tauber; Rudesheim; Sylt; Weimar; Wiesbaden; Wolfsburg; and Wurtzburg;

Furthermore, the specialists single out Bayreuth, Leipzig and Nuremberg as key destinations to watch – but still to realise their full potential!

**charm v efficiency**

A further change in emphasis within the findings sees a return amongst German buyers to more balanced views of what emphasis matters most when marketing Germany – *'old-fashioned charm and hospitality'* versus *'the country's reputation for high-tech efficiency'.*

The specialists have been moving in earlier polls towards an accent on efficiency when it comes to meetings planning (51% in 2007; 41% in '06; 32% in '05) as against declining proportions highlighting the importance of charm (27%; 36%; 41% respectively). The balance of responses in each successive survey felt each advantage mattered equally. However, in 2008 this latter grouping has suddenly surged ahead, to 35% of buyers (up from 12%) many using phrases such as *'these are not alternatives – both matter' ...*and *'the answer is to combine both'.* In contrast, the more polarised opinions argue that *'uniqueness and interest value matter – hence the importance of charm and hospitality, because technology is the same everywhere else'* versus *'Germany's USP is its efficiency and high-tech is a differentiation that ensures business success'.* Others argue that what overrides this debate is the intended purpose of the event, meetings tending towards a more businesslike approach, and incentives towards a more historic and experiential location. Munich and Nuremberg are quoted as examples where these two key dimensions to an event are considered as being of equal standing.

On the other hand, the views of international buyers continue to weigh more strongly on the side of traditional character instead of efficiency, the 2008 proportion of 57% only slightly down on 62% last year, and 54% in 2006. Their verbatim views include: *'my middle-age clients love the heritage and sense of welcome'; 'warmth and hospitality add memorability to an event'; 'charm gets the destination selected in the first place, but efficiency is the basis of a successful event'.*

**German superiority**

Reasons why Germany can be considered 'superior' for business tourism in comparison with other European countries are broadly the same whether for international or domestic planners. Characteristic comments highlight the country's reputation for punctuality; skilful organisation; excellent public transport; efficient airports; ease of access and centrality within Europe; professional event handlers; and all-round reliability. Typical comments are: 'you know what you are getting' …. 'high standards' … and 'disciplined and well-behaved people'. At the same time, buyers also acknowledge that the country can learn from its competitor destinations, notably in terms of *'offering more flexibility to meet customer needs'; 'focus more on gastronomy'; 'enhance service standards still further';* and *'do more to demonstrate amiability and your sense of humour'.*

A dozen countries seen as major challenges to Germany within the international marketplace include: Spain, Italy and Greece ('predictable weather'); East European countries – Bulgaria, Czech Republic and Hungary ('for good value'); Netherlands and Switzerland ('excellent MICE marketing); Austria ('same feel, but cheaper'); UK and Ireland ('no language barriers'); and Belgium ('historic atmosphere and culture'). However, domestic buyers remain highly loyal to Germany as their prime destination, and especially emphasise the advantages of ease of travel and good choice of venues.

**ideas**

Both categories of buyers offered bold ideas for political and destination leaders to consider when marketing Germany as a MICE destination. Some are very specific, for example *'improve childcare support for delegates attending association meetings'; 'train restaurant staff in English'; 'make visa entry easier for non-EU participants';* and *'provide more signage in more languages'.* More general recommendations focus on '*the need to promote Germany's seaside destinations';* *'facilitate VAT refunds on business expenses'; 'organise even more fam trips around the IMEX exhibition each year';* and *'never underestimate the importance of providing security'.* Long-haul planners (e.g. Australia, USA) suggest that Germany should do more to promote incentives (as opposed to meetings) in their markets, and particularly to highlight the appeal of smaller 'unknown' historic cities.

**environmentally-aware**

Finally, there was considerable support for the proposition that the underlying strength of the German economy will continue to underpin the MICE sector. Caveats include the continuing uncertainties of the global economy and the weak purchasing power of the dollar, but in general the country's reputation for financial stability and its upwards trend in growth are seen as desirable advantages. No doubt also of lasting significance is a view that the country is notably environmentally-aware and that the carbon footprint of MICE events therefore will be tackled seriously. This can only do Germany's MICE image a great deal of good.

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**Note:**

- Of **German buyers** in this poll: 29% arrange under 10 events a year; 54% arrange from 11-50 events a year; and 17% arrange over 51 events annually. Typically around three-quarters (72%) of these events are staged within Germany.

- Of **International buyers** in this poll: 29% arrange under 10 events a year; 46% arrange 11-50 events a year; and 25% arrange of 51 events a year. Typically between 10 and 12% of these events are staged within Germany.

***IMEX would like to thank all those buyers who responded so thoroughly and professionally to this research.***