

MICE Outbound Travel 2000

Special Evaluation of the
European Travel Monitor
on behalf of the
European Travel Commission

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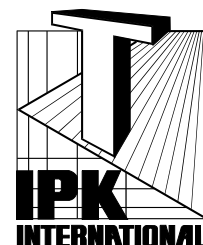
Tourism Research – Tourism Marketing – World Travel Monitor

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Introduction

Two additional modules were commissioned this year with respect to the ETC Pool. The first module was the “German Outbound Holiday Profile 2000”. This second additional module ordered within the context of the ETC Pool is entitled “MICE Outbound Travel 2000.”

The objective of this review is to provide an overview of the demand seen for MICE trips in Europe. These MICE trips encompass Conference/Congress/Seminar trips, Exhibitions/Trade Fair trips, and also Incentive trips.

The following analysis is based on the data of the European Travel Monitor 2000 and thus describes the so-called MICE trips taken by Europeans during travel year 2000. This review not only takes the markets of origin and destination regions for these MICE trips into consideration, but also compares the different MICE travel segments to all business and/or outbound trips taken by Europeans. In conclusion, a synopsis of the MICE market segment growth over the last five years is provided.

1. Market Volume in 2000

1.1. Total Market Volume of European Outbound Travel

During 2000, Europeans made a total of 343.6 million outbound trips of at least one overnight stay abroad.

1.2. Market Volume of European Outbound MICE Travel

During 2000, Europeans made a total of 20.1 million outbound MICE trips (Conference/Congress/Seminar, Exhibitions/Trade Fair, Incentive trips) of at least one overnight stay abroad.

Hence, the MICE segment comprises 6% of all outbound trips taken by Europeans.

Market Volume in 2000		
Total European Outbound Trips	343.6 million	100%
European Business Outbound Trips	62.2 million	18%
MICE European Outbound Trips	20.1 million	6%

Source: European Travel Monitor – 2000; IPK International, Munich



1.3. Volume of the Different MICE Segments

MICE Segments		
All Outbound MICE Trips	20.1 million	100%
- Conference/Congress/Seminar	9.7 million	48%
- Exhibition/Trade Fair	8.5 million	42%
- Incentive	2.0 million	10%

Source: European Travel Monitor – 2000; IPK International, Munich

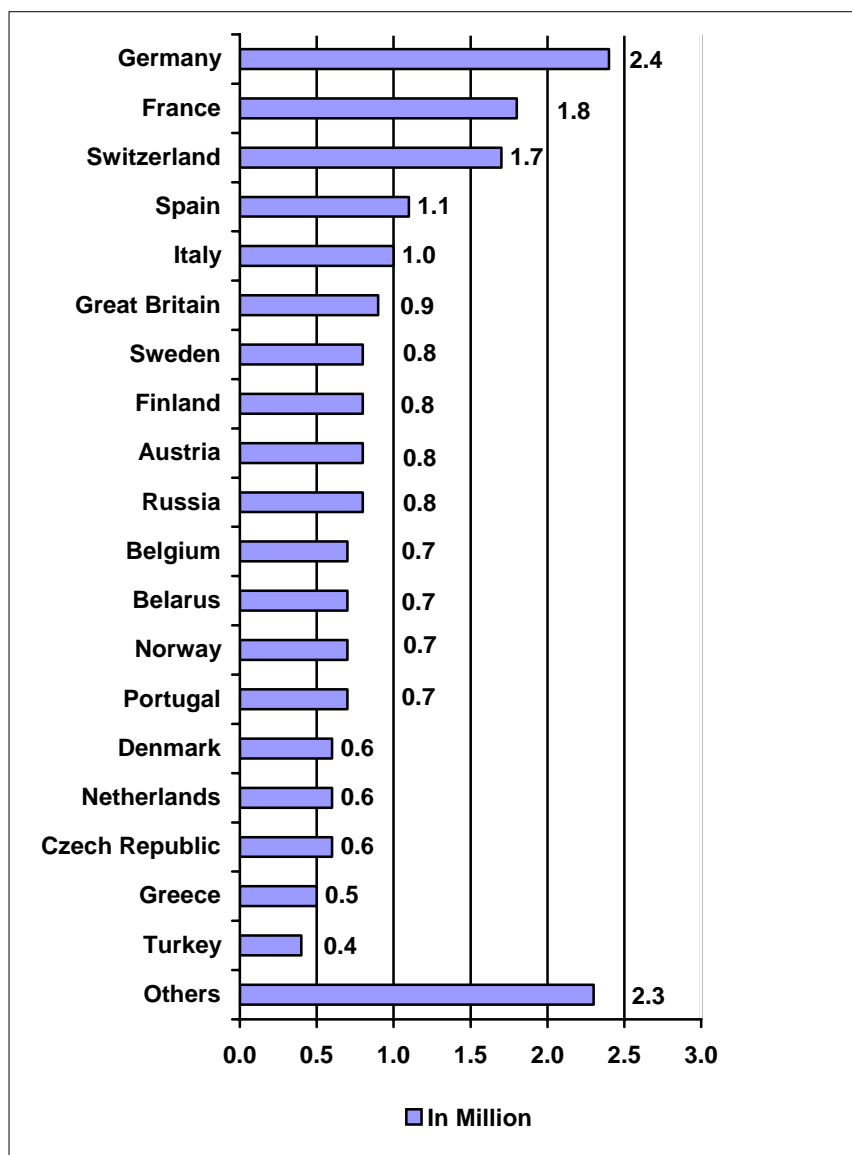
The largest segment within the MICE trip segment was those trips made for the purpose of visiting a conference, congress or seminar (9.7 million trips).

Exhibition/trade fair trips were seen to be the second largest segment (8.5 million).

And with a share of just 10%, the least important segment was that comprised by incentive trips (2 million).

2. MICE Markets of Origin in 2000

2.1. Number of MICE Trips per Country of Origin



Source: European Travel Monitor – 2000; IPK International, Munich



Germany ranked as the leading country of origin for the MICE trip segment. Germany's total of 2.4 million outbound MICE trips in 2000 comprises 12% of all 20.1 million outbound MICE trips taken by the Europeans in 2000.

France came in second in the MICE outbound segment. The 1.8 million French MICE outbound trips in 2000 corresponds to a 9% share of all European MICE outbound trips in 2000.

Switzerland ranked third with 1.7 million trips (8%). Nearly one third of the market is covered by these three originating countries.

2.2. Market Share of MICE Trips

2.2.1. The Market Share of MICE Trips in % of European Outbound Trips

Countries of Origin	MICE Outbound Trips		Market Share of MICE Trips in % of all Outbound Trips of Each Country
	In Million	In %	
Germany	2.4	12	3
France	1.8	9	7
Switzerland	1.7	8	13
Spain	1.1	5	12
Italy	1.0	5	6
Great Britain	0.9	4	2
Sweden	0.8	4	7
Finland	0.8	4	12
Austria	0.8	4	9
Russia	0.8	4	8
Belgium	0.7	4	6
Belarus	0.7	3	7
Norway	0.7	3	15
Portugal	0.7	3	16
Denmark	0.6	3	10
Netherlands	0.6	3	3
Czech Republic	0.6	3	10
Greece	0.5	2	15
Turkey	0.4	2	12
Others	2.3	11	6
Total	20.1	100	6

Source: European Travel Monitor – 2000; IPK International, Munich
 Deviations from 100% are due to rounding effects.



Garnering a total market share of just 6%, the MICE segment is a rather small segment within the total European outbound travel. The individual MICE markets also hold a rather small share compared against all the outbound trips taken.

The largest MICE market of origin, Germany, only recorded about 3% MICE trips compared within all outbound trips of the Germans. France recorded a 7% share and Switzerland 13% of all Swiss outbound trips.

The country with the highest share of MICE outbound trips was Portugal with 16% within all outbound trips of the Portuguese.

2.2.2. The Market Share of MICE Trips in % of European Business Outbound Trips

Countries of Origin	MICE Outbound Trips		Market Share of MICE Trips in % of all Outbound Business Trips of Each Country
	In Million	In %	
Germany	2.4	12	35
France	1.8	9	40
Switzerland	1.7	8	63
Spain	1.1	5	74
Italy	1.0	5	34
Great Britain	0.9	4	9
Sweden	0.8	4	32
Finland	0.8	4	48
Austria	0.8	4	51
Russia	0.8	4	19
Belgium	0.7	4	65
Belarus	0.7	3	14
Norway	0.7	3	54
Portugal	0.7	3	72
Denmark	0.6	3	48
Netherlands	0.6	3	35
Czech Republic	0.6	3	41
Greece	0.5	2	51
Turkey	0.4	2	57
Others	2.3	11	23
Total	20.1	100	32

Source: European Travel Monitor – 2000; IPK International, Munich
 Deviations from 100% are due to rounding effects.



32% of all European outbound business trips are MICE trips.

Taking a look at the market share of the different countries of origin as regards the total business trip segment, Germany has a share of 35% of MICE trips compared with all German outbound business trips. France has a slightly higher share of 40% and Switzerland has a share of 63%.

Portugal was again the country with the highest share: 72% of their outbound trips were MICE trips in the year 2000 compared with all outbound business trips of the Portuguese.

2.3. The Most Important Markets of Origin by Different MICE Segments

2.3.1. Markets of Origin for Conference/Congress/Seminar Outbound Trips

Countries of Origin	Conference/Congress/Seminar	
	In Million	In %
Germany	1.7	17
Switzerland	0.9	9
France	0.7	8
Norway	0.6	6
Sweden	0.5	6
Finland	0.5	5
Denmark	0.4	5
Great Britain	0.4	4
Austria	0.4	4
Italy	0.4	4
Others	3.1	32
Total	9.7	100

Source: European Travel Monitor – 2000; IPK International, Munich
 Deviations from 100% are due to rounding effects.

Germany is the leading country as far as Conference/Congress/Seminar outbound trips are concerned. 1.7 million of the total 9.7 million trips in 2000 were made by the Germans. This is equivalent to a share of 17%.

Switzerland recorded the second highest number of trips in this segment. 9% of all European Conference/Congress/Seminar outbound trips (=0.9 million) were made by the Swiss in 2000, closely followed by the French who account for 8% (=0.7 million) of the trips in this segment.

2.3.2. Markets of Origin for Exhibition/Trade Fair Outbound Trips

Countries of Origin	Exhibition/Trade Fair	
	In Million	In %
France	1.0	12
Switzerland	0.8	9
Belgium	0.6	7
Spain	0.6	7
Portugal	0.5	6
Russia	0.5	6
Great Britain	0.4	5
Belarus	0.4	5
Greece	0.4	4
Austria	0.4	4
Others	2.8	33
Total	8.5	100

Source: European Travel Monitor – 2000; IPK International, Munich
Deviations from 100% are due to rounding effects.

In the Exhibition and Trade Fair segment, France is the most important source market. Of all 8.5 million Exhibition/Trade Fair outbound trips taken by the Europeans the French made 1.0 million which corresponds to a share of 12%.

Switzerland came in second at 9% (0.8 million). Belgium and Spain both held a 7% share (=0.6 million) of all Exhibition and Trade Fair outbound trips made by the Europeans.

2.3.3. Markets of Origin for Incentive Outbound Trips

Countries of Origin	Incentive	
	In Million	In %
Germany	0.4	22
Italy	0.3	17
Spain	0.1	6
Croatia	0.1	5
Turkey	0.1	5
Denmark	0.1	5
Others	1.0	41
Total	2.0	100

Source: European Travel Monitor – 2000; IPK International, Munich
 Deviations from 100% are due to rounding effects.

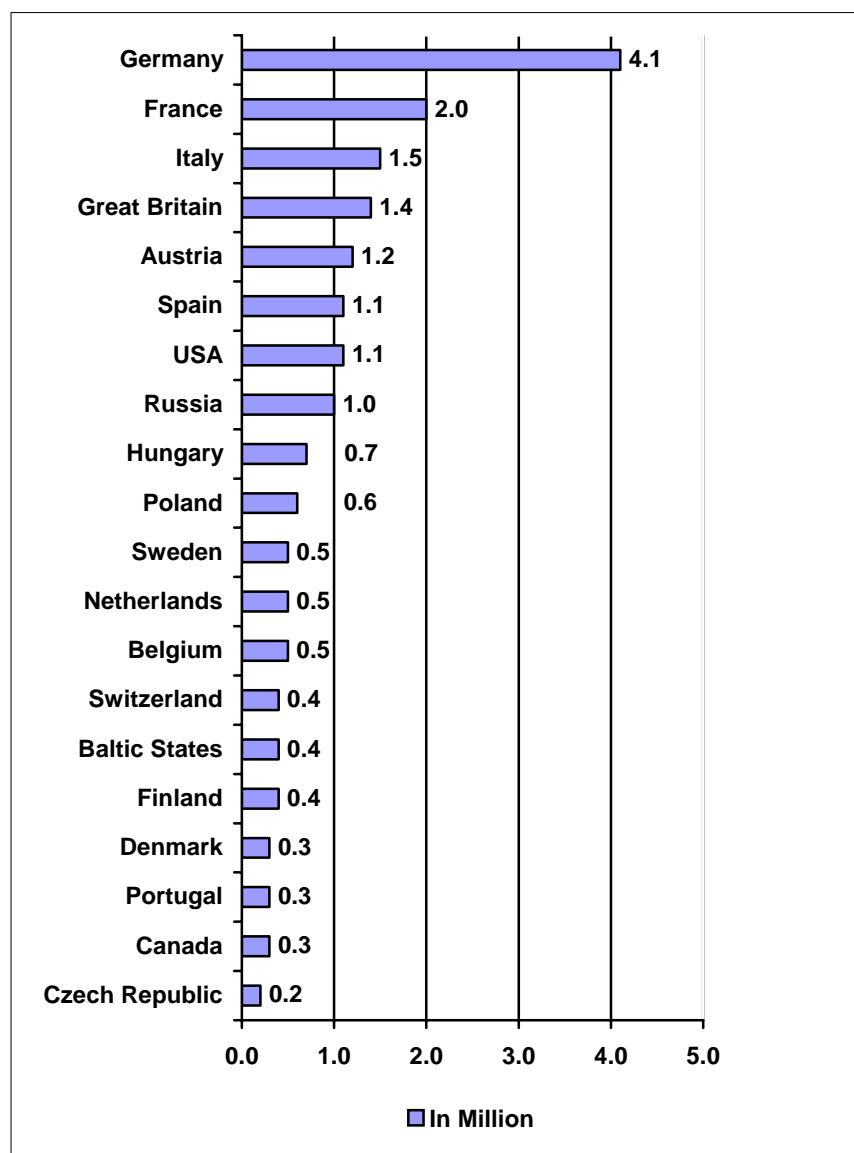
Germany was the most important source market for outbound incentive trips with a total of 0.4 million or 22% of all 2.0 million European Incentive outbound trips.

Italy also recorded higher numbers, namely 0.3 million or 17% of all European Incentive outbound trips.

These two countries together accounted nearly 40% of the entire market. All other countries had lower shares on the Incentive market.

3. MICE Destination Countries in 2000

3.1. Number of MICE Trips per Destination Country



Source: European Travel Monitor – 2000; IPK International, Munich



Germany not only ranked first among the countries of origin for the MICE trip segment but also as a MICE destination country. There were a total of 4.1 million European MICE trips to Germany in 2000. Meaning Germany welcomed twice as many MICE trips to its homeland than Germans themselves took as outbound MICE trips. The 4.1 million MICE trips to Germany comprise 20% of the total 20.1 million outbound MICE trips made by the Europeans in 2000.

France also held the second position not only in outbound but also for incoming. A total of 2.0 million MICE trips were made to France within the European MICE outbound segment in 2000, equaling a share of 10%. This figure is only slightly higher compared to the outbound MICE trips taken by the French.

Italy ranked third with 1.5 million (8%) incoming MICE trips in 2000. Great Britain was on rank four with 1.4 million trips (7%). These four destination countries together accounted for about half of the total MICE market.

3.2. The Most Important Destination Countries by Different MICE Segments

3.2.1. Destination Countries for Conference/Congress/Seminar Trips

Destination Countries	Conference/Congress/Seminar	
	In Million	In %
Germany	1.5	16
France	1.0	10
Great Britain	0.9	9
Italy	0.7	7
Spain	0.6	7
USA	0.6	7
Austria	0.6	6
Russia	0.4	4
Sweden	0.3	3
Poland	0.3	3
Others	2.6	27
Total	9.7	100

Source: European Travel Monitor – 2000; IPK International, Munich
 Deviations from 100% are due to rounding effects.

Germany is the leading destination country for Conference/Congress/Seminar trips in 2000. 16% of all European Conference/Congress/Seminar outbound trips (9.7 million) were made to Germany.

At 10% of all Conference/Congress/Seminar trips, France recorded the second highest trip volume in this segment, closely followed by Great Britain with a market share of 9%.

3.2.2. Destination Countries for Exhibition/Trade Fair Trips

Destination Countries	Exhibition/Trade Fair	
	In Million	In %
Germany	2.4	29
France	0.8	9
Italy	0.7	8
Russia	0.5	6
Great Britain	0.4	5
Spain	0.4	4
Austria	0.3	4
USA	0.3	3
Poland	0.3	3
Belgium	0.2	3
Others	2.1	25
Total	8.5	100

Source: European Travel Monitor – 2000; IPK International, Munich
 Deviations from 100% are due to rounding effects.

In the Exhibition and Trade Fair segment, Germany again came out on top. 29% of all Exhibition and Trade Fair outbound trips made by the Europeans led to Germany. This corresponds to an incoming volume of 2.4 million trips.

At 9%, France's share of incoming Exhibition and Trade Fair trips by Europeans was considerably lower. Italy follows closely behind, commanding an 8% share of all Exhibition and Trade Fair trips taken by the Europeans.

3.2.3. Destination Countries for Incentive Trips

Destination Countries	Incentive	
	In Million	In %
Austria	0.3	14
France	0.2	9
Germany	0.2	9
Italy	0.2	8
USA	0.1	6
Netherlands	0.1	5
Sweden	0.1	4
Finland	0.1	4
Russia	0.1	4
Great Britain	0.1	3
Others	0.6	32
Total	2.0	100

Source: European Travel Monitor – 2000; IPK International, Munich
 Deviations from 100% are due to rounding effects.

During travel year 2000, Austria turned out to be the leading country for incoming incentive trips taken by the Europeans. 14% (=0.3 million trips) of all European Incentive outbound trips were made to Austria.

France and Germany were the number two destination spot for European Incentive trips at 9% each. All other countries (with the two exceptions of Italy and the USA) recorded shares of 5% or less.

4. MICE Trend compared to Total Outbound Growth

Year	Outbound Trips of Europeans (in Million)	Growth of Outbound Trips (compared to previous year in %)	MICE Outbound Trips of Europeans (in Million)	Growth of MICE Outbound Trips (compared to previous year in %)
1996	263.4	-	13.6	
1997	269.8	+2	14.8	+9
1998	291.7	+8	16.9	+14
1999	324.4	+11	18.9	+12
2000	343.6	+6	20.1	+7

Source: European Travel Monitor – 1996-2000; IPK International, Munich

As regards total outbound trips as well as MICE outbound trips there has been a continuous growth since 1996.

The growth rate for MICE trips were in general above the growth rate for the total outbound market in all these years. This concerns above all the years 1997 and 1998.