

# Interface MICE survey

## Buyer expectations & 2021 forecasts on the French MICE market

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# Context & features of the survey

Survey

## 80 buyers

MICE professionals who participated in the survey

## January 2021

Period of the survey



**MICE agencies (59%)**

**Corporate Meeting Planners (15%)**

Travel agencies with a MICE activity (10%)

Freelancers (8%)

International associations (5%)

Tour operators with a MICE activity (4%)



**CEOs (44%)**

**Project Managers (21%)**

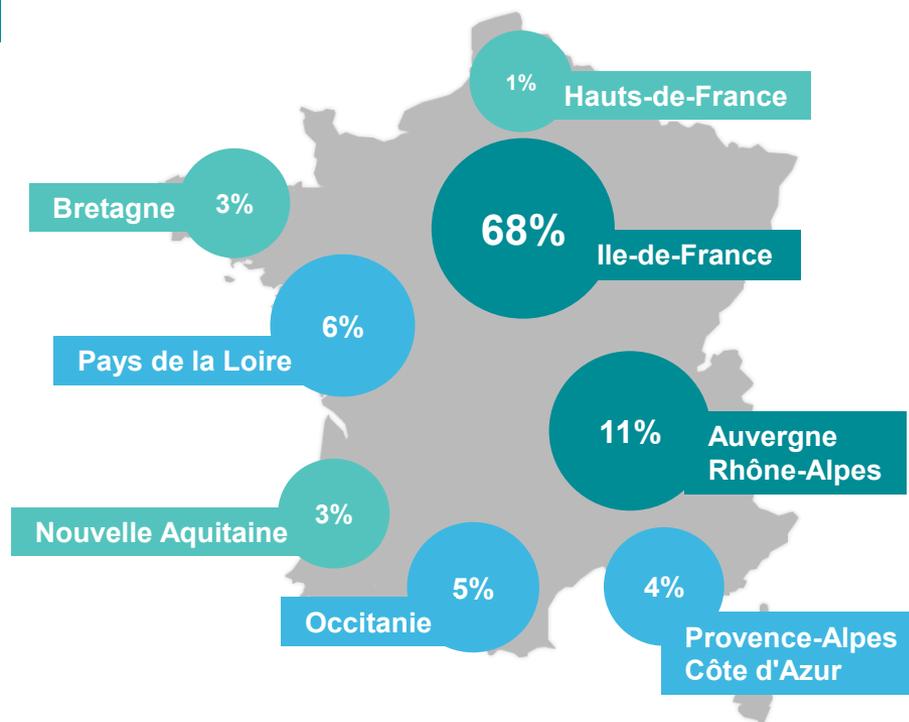
Event Directors (16%)

Corporate Event Managers (13%)

Freelancers (4%)

Association Event Managers (3%)

The standard profile of the sample is a CEO of a MICE agency based in Paris region





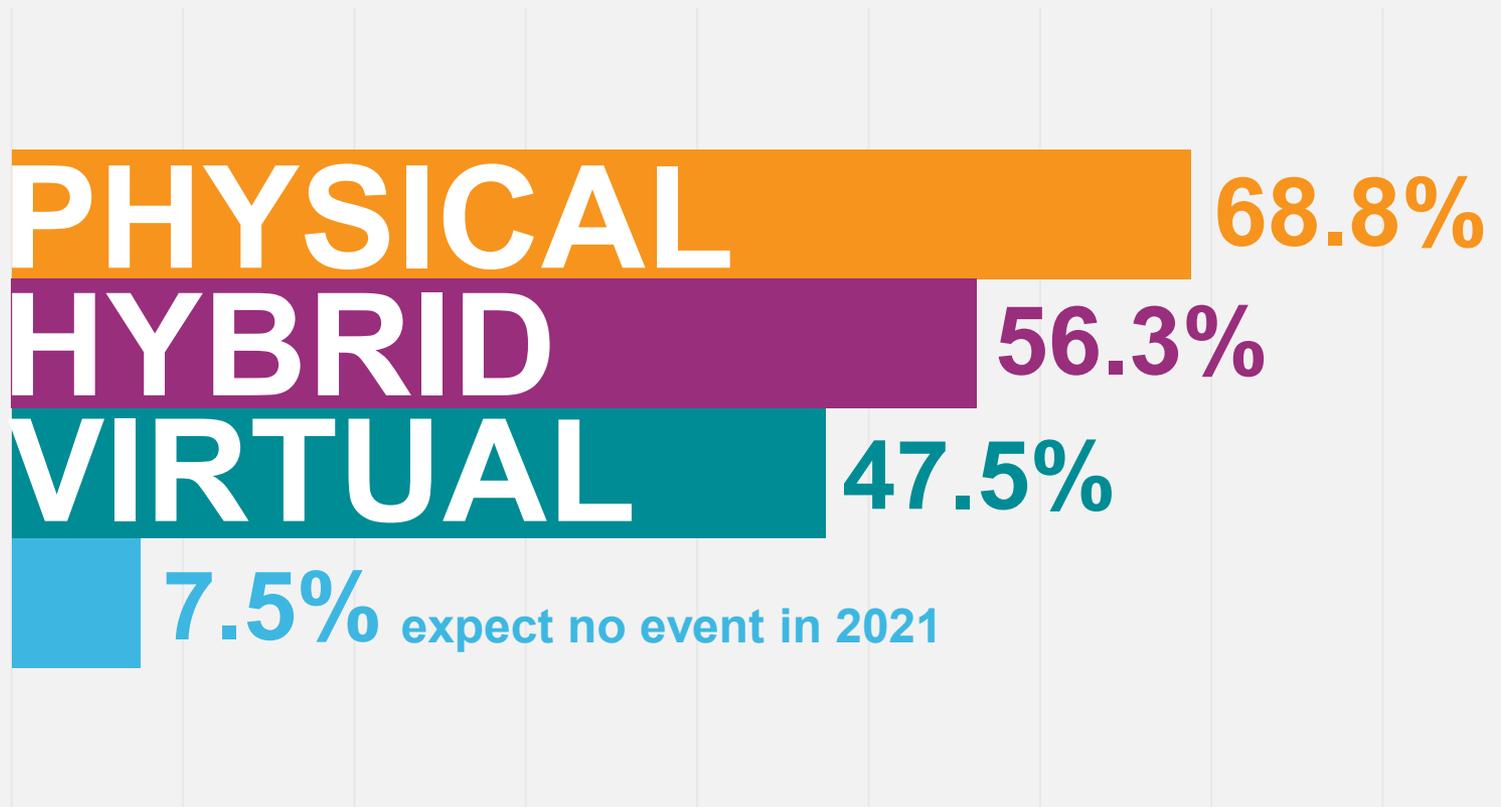
## 1. Physical vs. Virtual events

# Formats of events in 2021\*

Survey

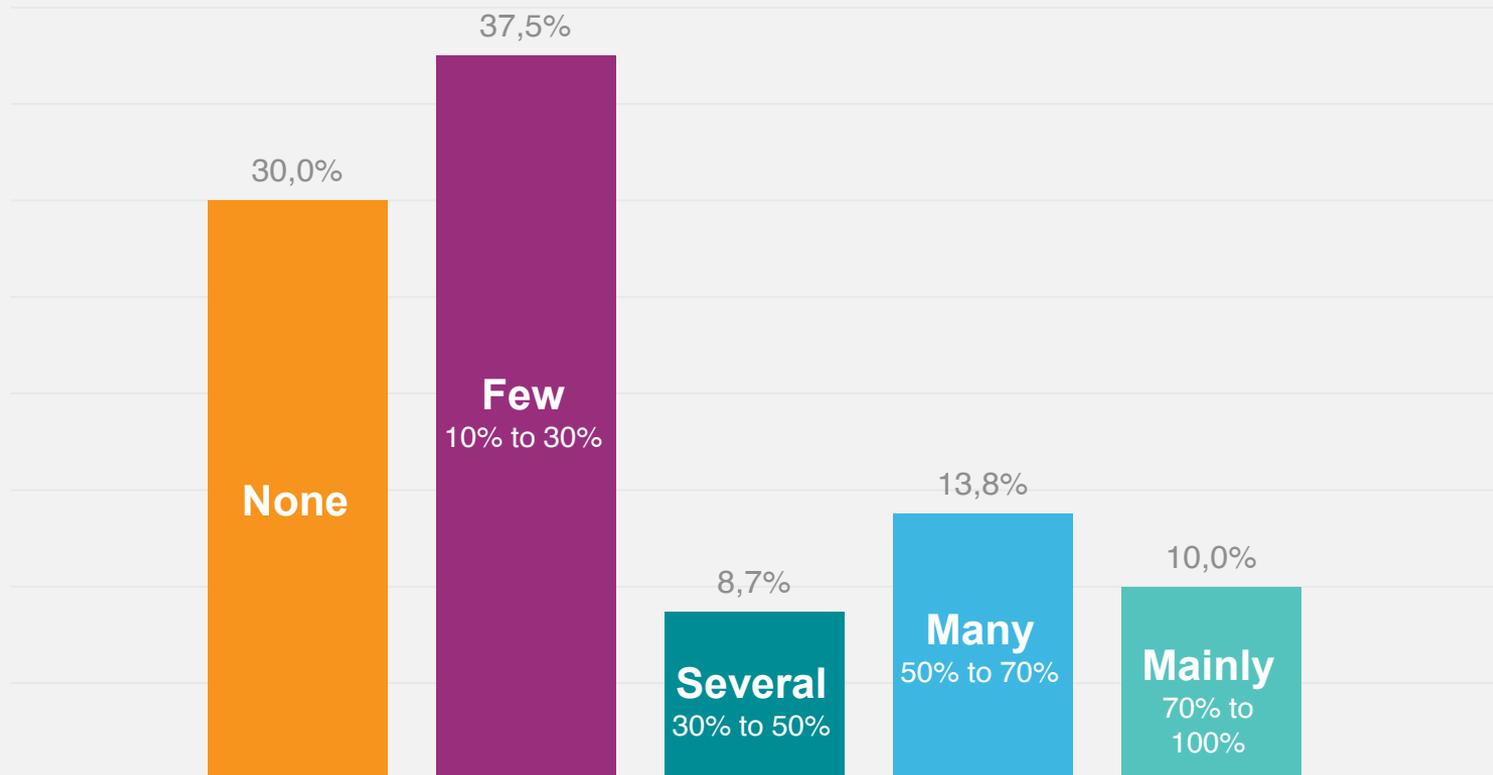
\* Considering the context in January 2021

## Formats of events

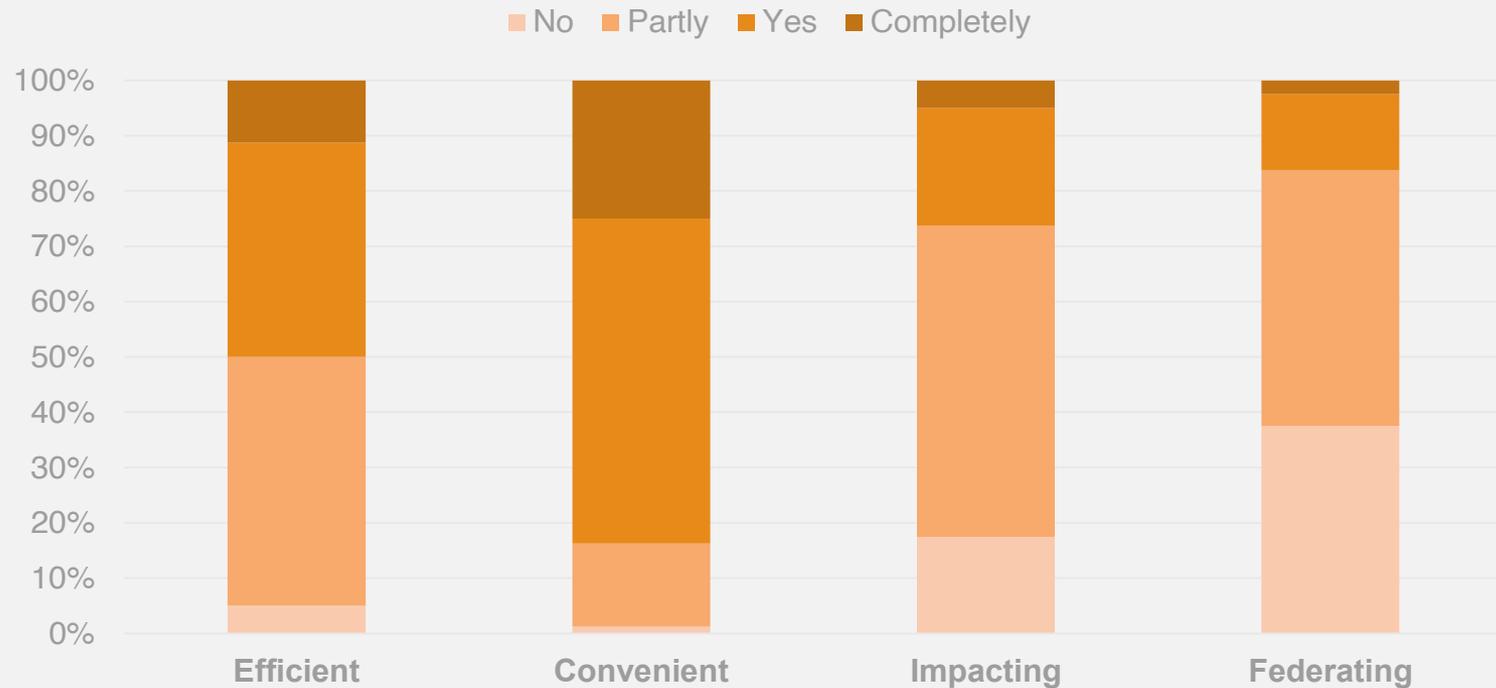


# Focus on hybrid and virtual events

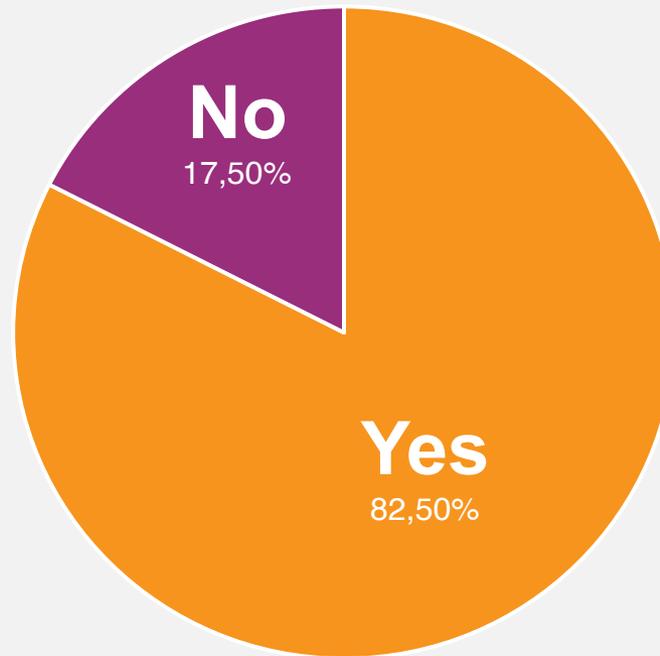
Hybrid and virtual events organized in 2020



## Perception of hybrid and virtual events compared to physical ones



Are physical events and meetings as relevant and still essential after 2020?



The image shows a close-up, low-angle view of the Arc de Triomphe in Paris, France. The monument is made of light-colored stone and features intricate carvings and sculptures. A large archway is visible in the center. The sky is a clear, bright blue. In the foreground, there are some green leaves from a tree on the left. At the bottom of the monument, there is a list of cities. The text is overlaid on the image with a white background and a black border.

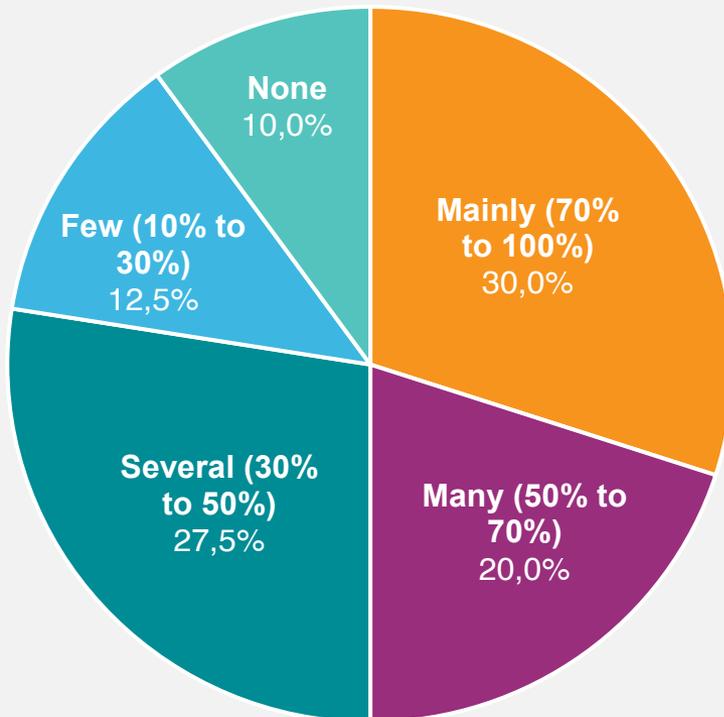
## 2. French MICE market recovery projections

PRENTZLOW  
LUBECK  
PULTUSK  
EYLAU  
OSTROLENKA  
DANTZIG  
HEILSBERG  
LANDSHUT  
ECKMULH  
RATISBONNE

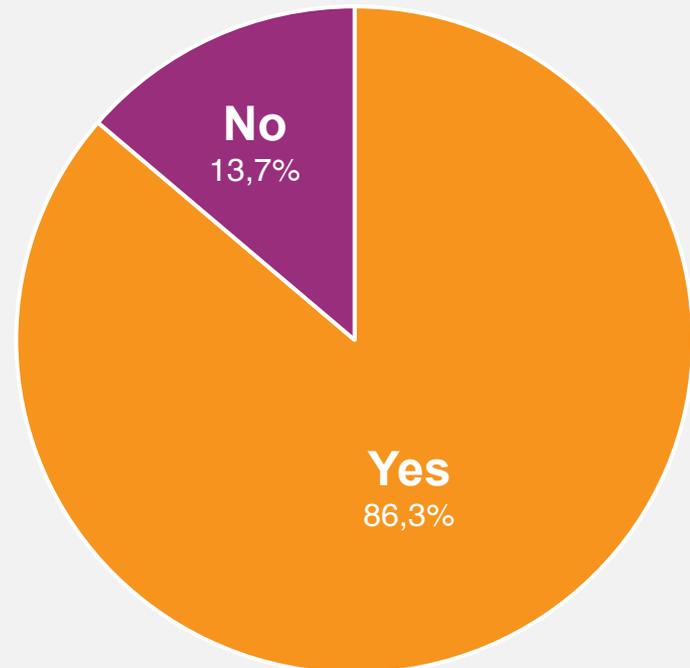
# Events abroad\*

\* Considering the context in January 2021 and forecast of a potential recovery assumed at the moment

### Events organized abroad in 2019



### Plan to organize event abroad in 2021

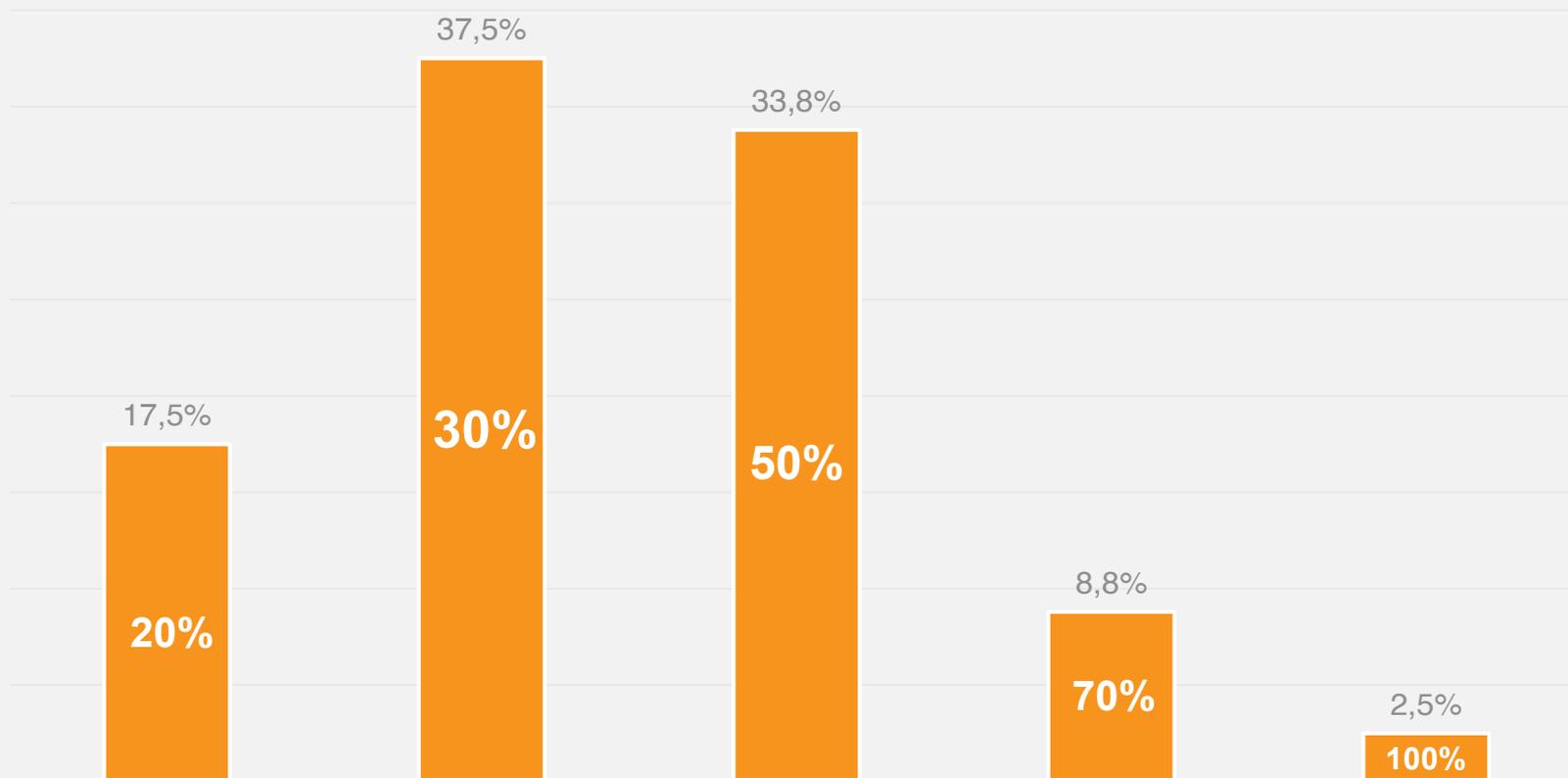


# Business recovery estimate in 2021\*

Survey

\* Recovery compared to 2019

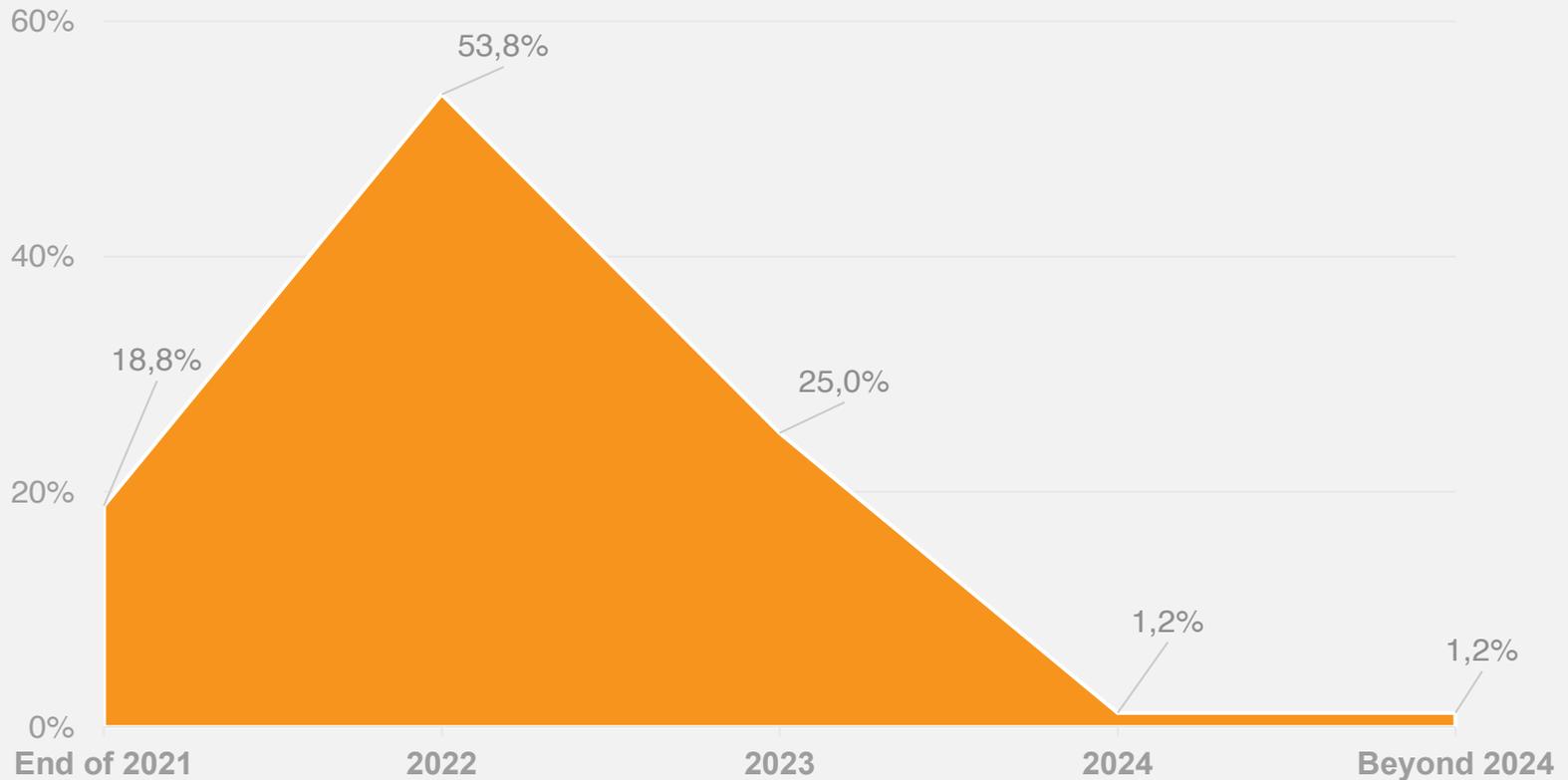
## Proportion of business estimated in 2021 compared to 2019



# Prospects for business recovery

Survey

Period when the MICE industry will recover the pre-crisis level (2019)



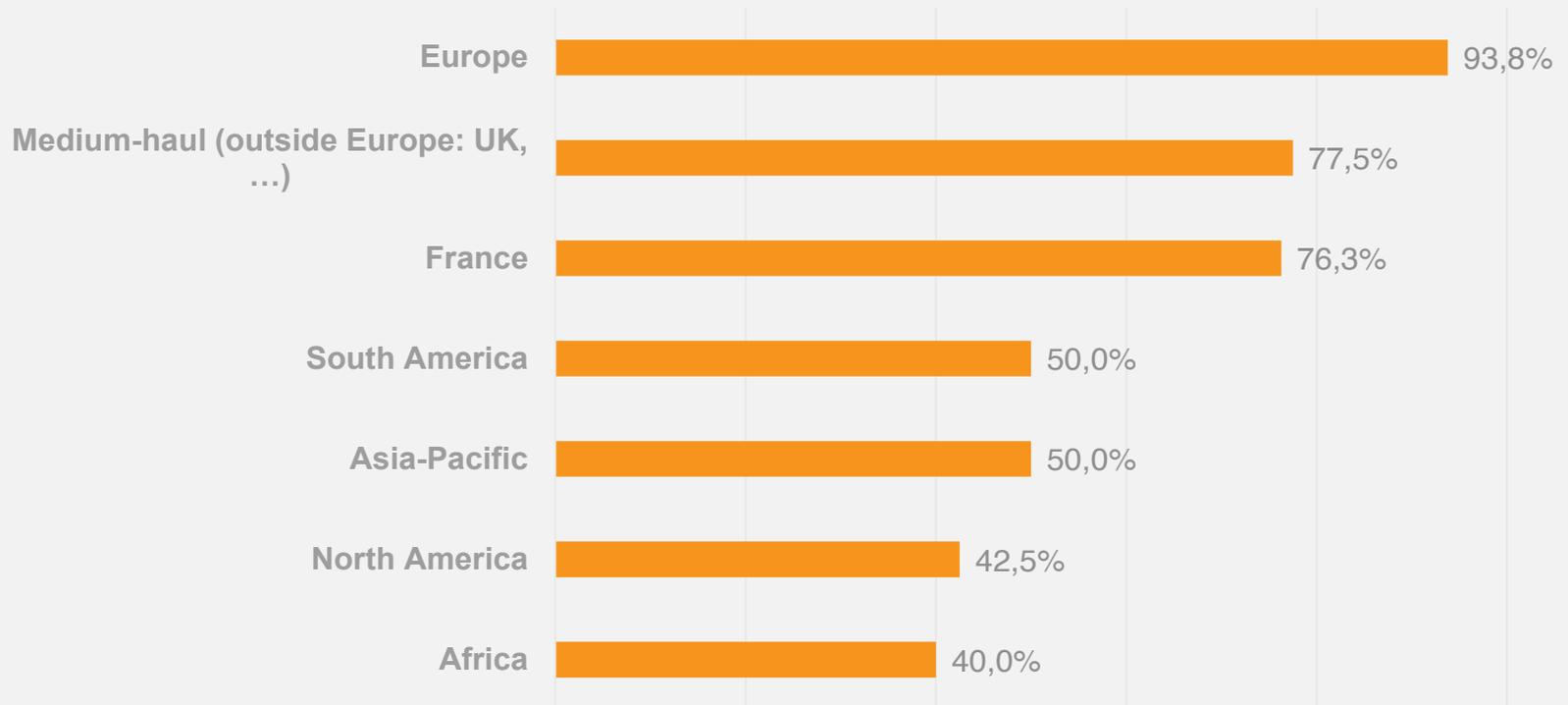
A hand reaches down from the top of the frame, and another hand reaches up from the bottom. The background is a blue sky with scattered white clouds. The text is centered in the middle of the image.

### **3. French MICE buyers and DMOs**

# Destinations with more interest from French buyers in 2021

Survey

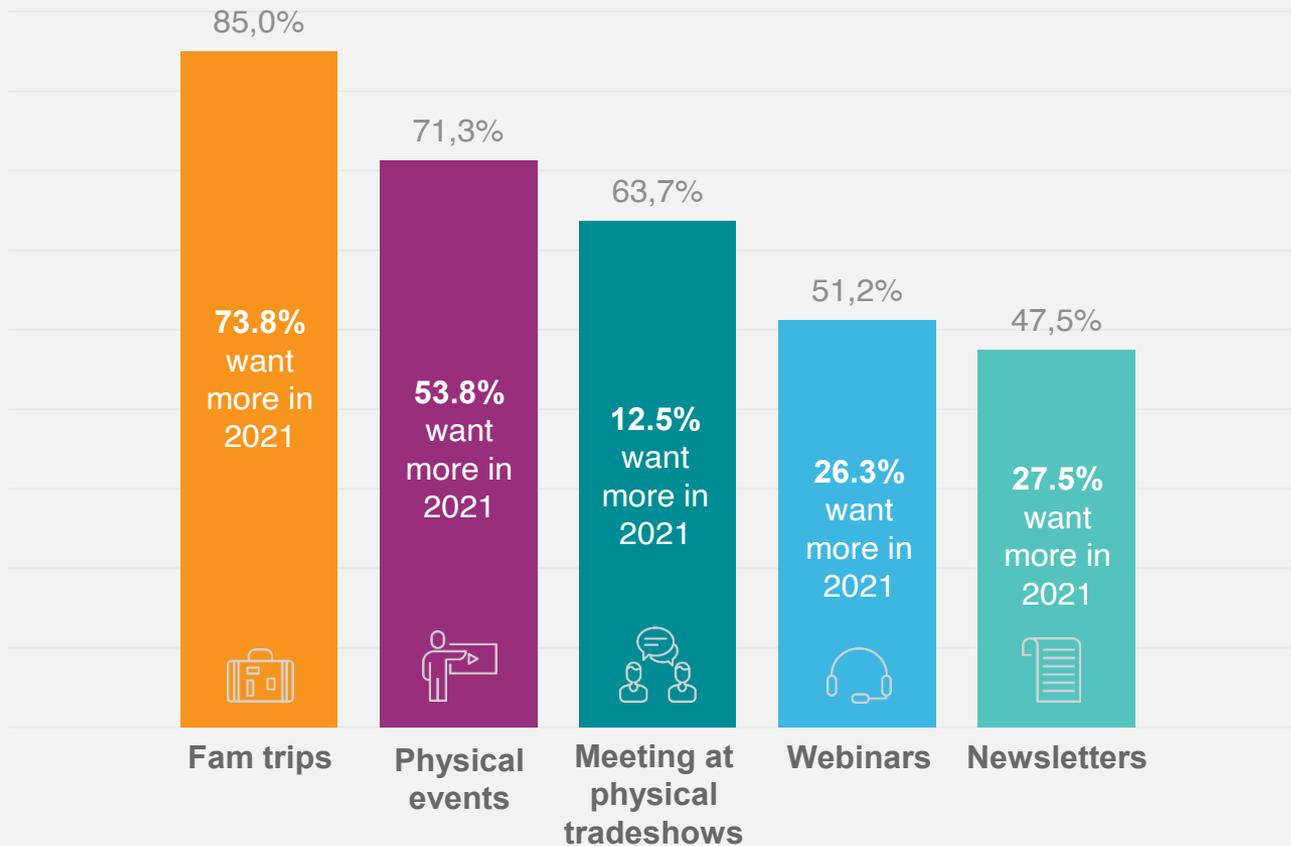
## Request for information and updates in 2021



# Buyers' favorite marketing actions

Survey

## Top 5 of favorite actions set up by DMOs



## Other actions

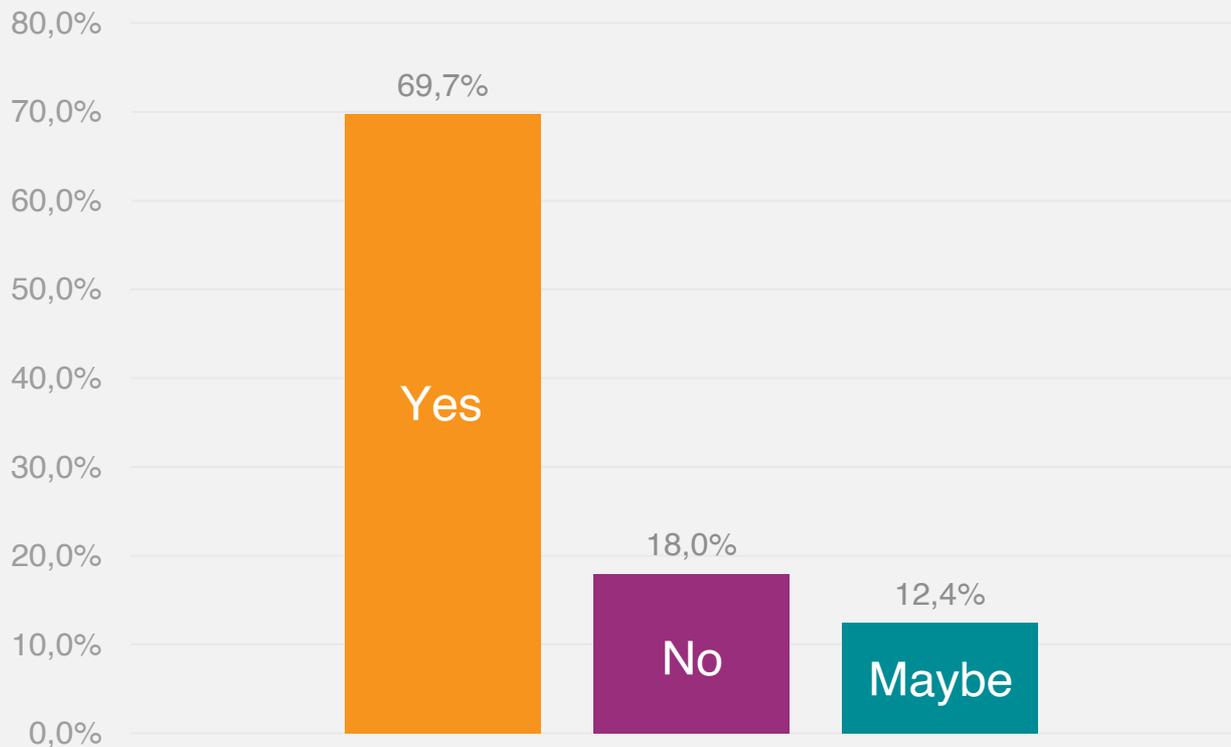
appreciated by buyers:

**30%** - Individual virtual meeting (e.g. via Zoom, Teams, ...)

**30%** - Individual physical meeting (sales call at the buyer office)

**20%** - Meeting on virtual tradeshows

## Will you use DMOs services in 2021?



## Why yes?

**45.9%** - Request for general information

**16.4%** - Research for providers (hotels, venues, ...)

**16.4%** - Updates about local providers after the crisis

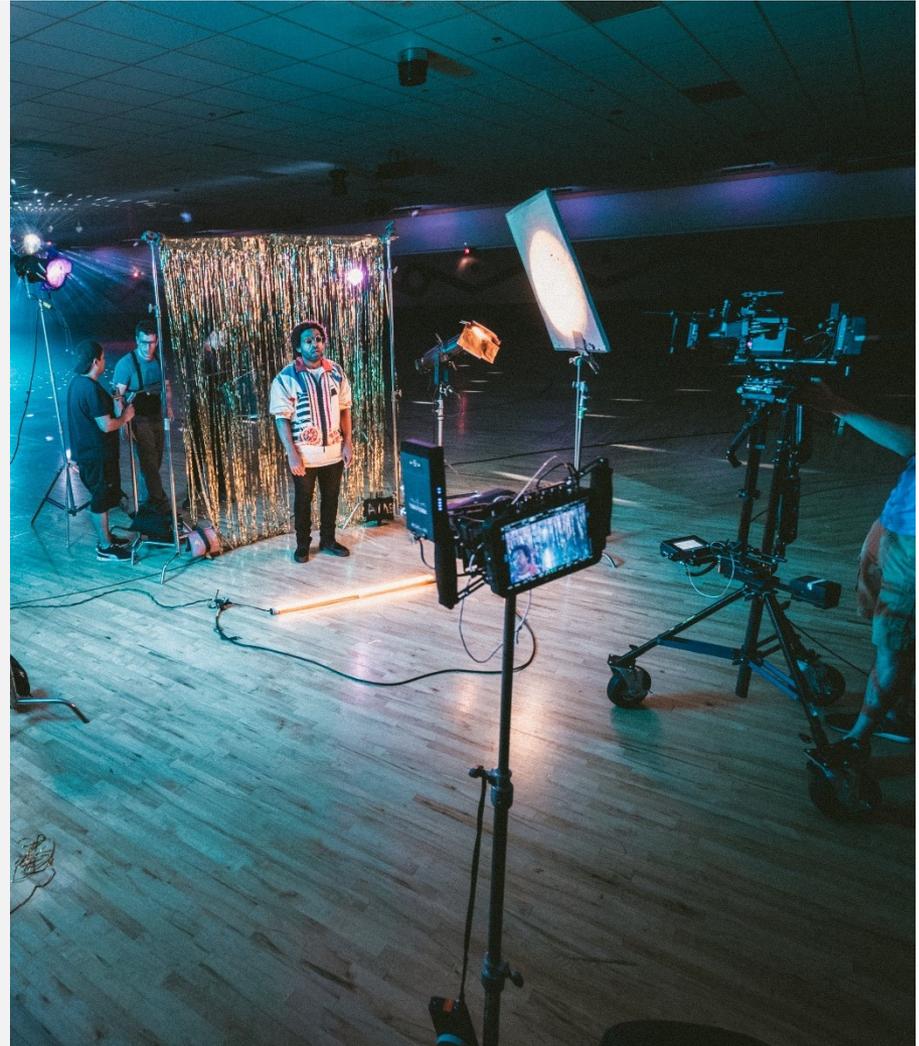
**14.8%** - Sanitary regulation updates

**3.3%** - Support programs and grants

**3.3%** - Collect new ideas for events (format, thematic, ...)

## Physical or virtual events? (1/2)

- Hybrid and virtual formats have been a direct and logical response to the sudden restrictions caused by the pandemic, for French event organizers to continue their activity in a different way. However, these digital formats have not been considered as a sufficient long-term alternative to physical events. According to the sample, they can be efficient and convenient, but not as impacting and federating as a physical one.
- Half of the sample has organized less than 50% of their events in virtual in 2020, including 30% that organized no digital event at all.



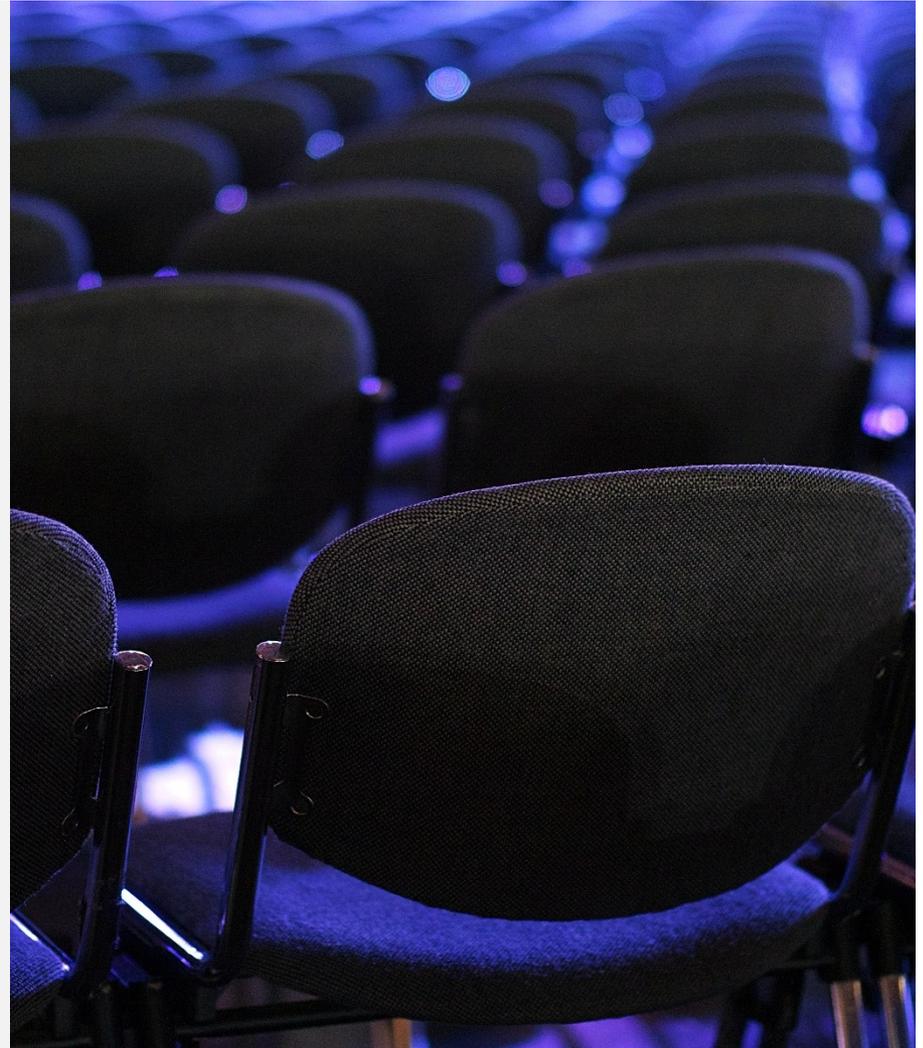
## Physical or virtual events? (2/2)

- Physical events will recover as soon as a sustainable and safe context will allow it. But the recovery will happen in two phases: in a short and medium term (2021), virtual, and especially hybrid formats, will cohabit with physical ones, the time for the governments and event stakeholders to initiate and set up an effective process to guarantee a safe environment for event participants.
- 68.8% of the sample plan to organize physical events in 2021, 56.3% hybrid ones, and a great part of them plan to do both.



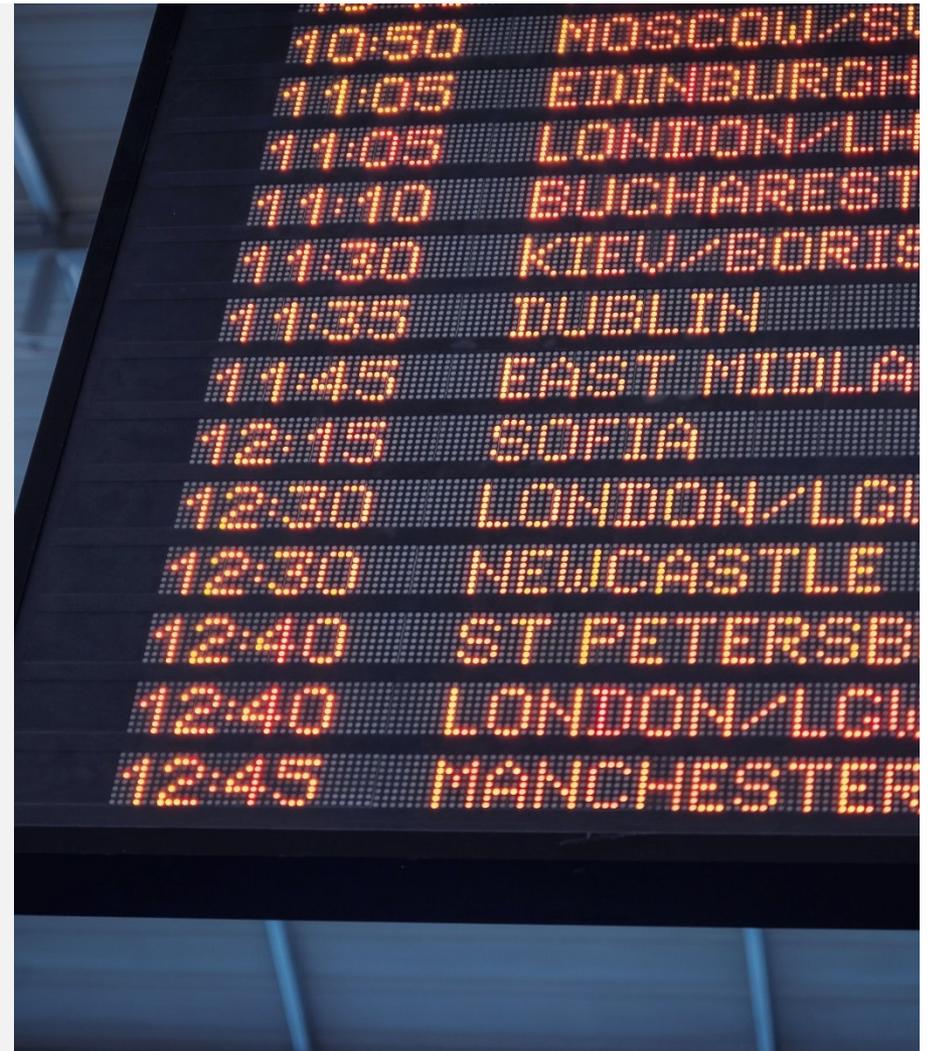
## The recovery

- A great majority of the sample forecasts a business recovery to the pre-crisis level not before 2022, with a first partial return of 30%-50% of their activity in 2021.
- Despite the lack of visibility about the end of the pandemic, and so about the reopening of international borders, French MICE buyers still plan to organize events abroad in 2021 (86.3%). This optimism has been reinforced with the arrival of the vaccine.
- Nevertheless, almost 20% of the sample foresee a full business recovery by the end of 2021.



## International destinations (1/2)

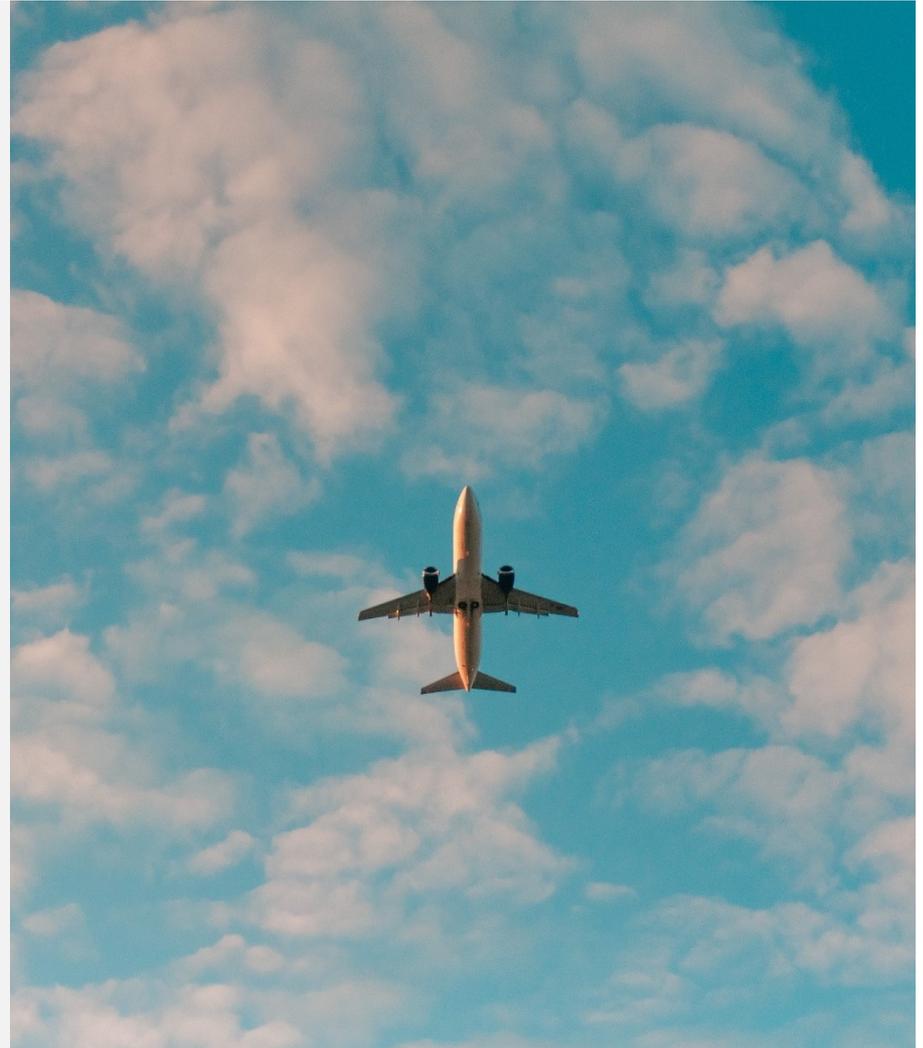
- As highlighted in the 2020 April survey\*, the international events will happen in two steps: first, events will be held in national scale and in short and medium-haul destinations, mainly in Europe thanks to the proximity and the potential future EU travel policies and agreements that will probably ease the exchanges between EU members, especially business trips. That is one of the reasons why more than 9 interviewed buyers out of 10 will request information and updates about European destinations in 2021, and 77.5% about other medium-haul ones.



\* Interface MICE survey, "Impact of Covid-19 on the French MICE market - April 2020"

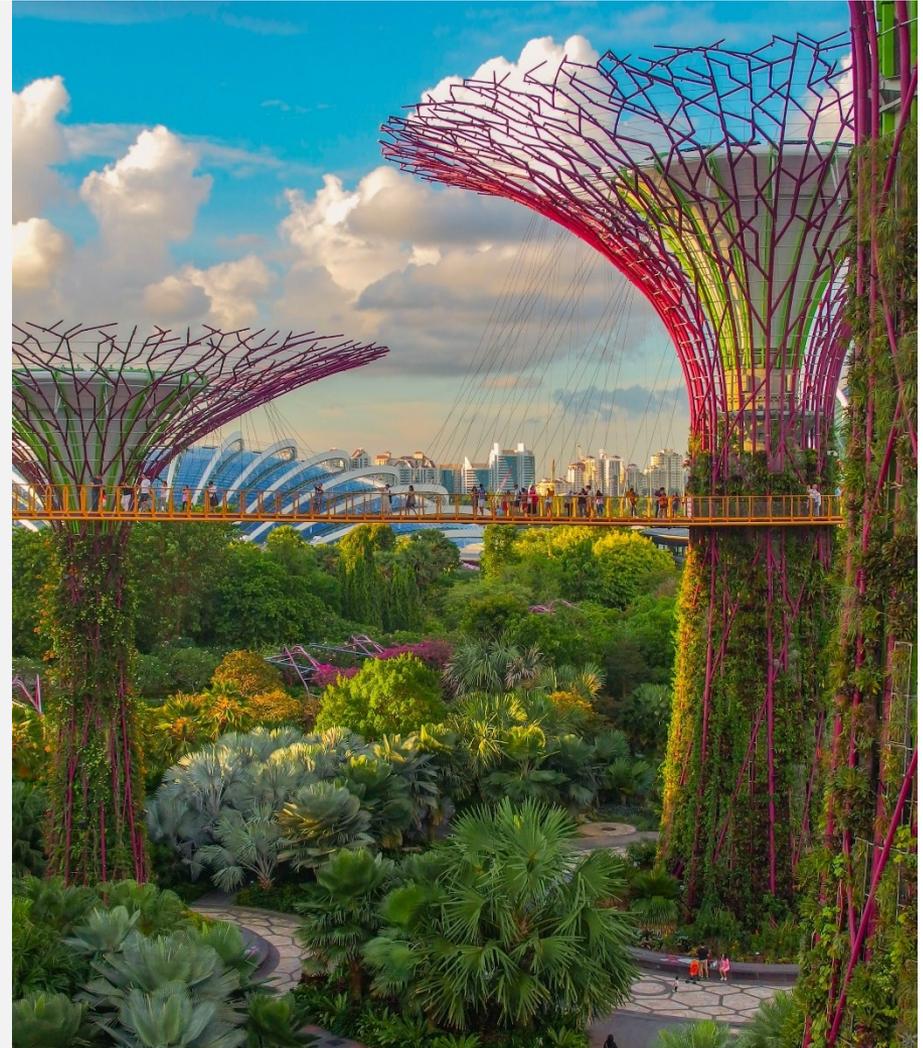
## International destinations *(2/2)*

- Long-haul destinations will be considered in a second hand, probably by early 2022, when the activity will return to its pre-crisis level, as expected by 25% of the sample. Nevertheless, French buyers need to anticipate and prepare these events from 2021. Therefore, information and updates about these destinations will still be welcomed and useful.
- Asia-Pacific and South America have been the most mentioned long-haul destinations by the sample.



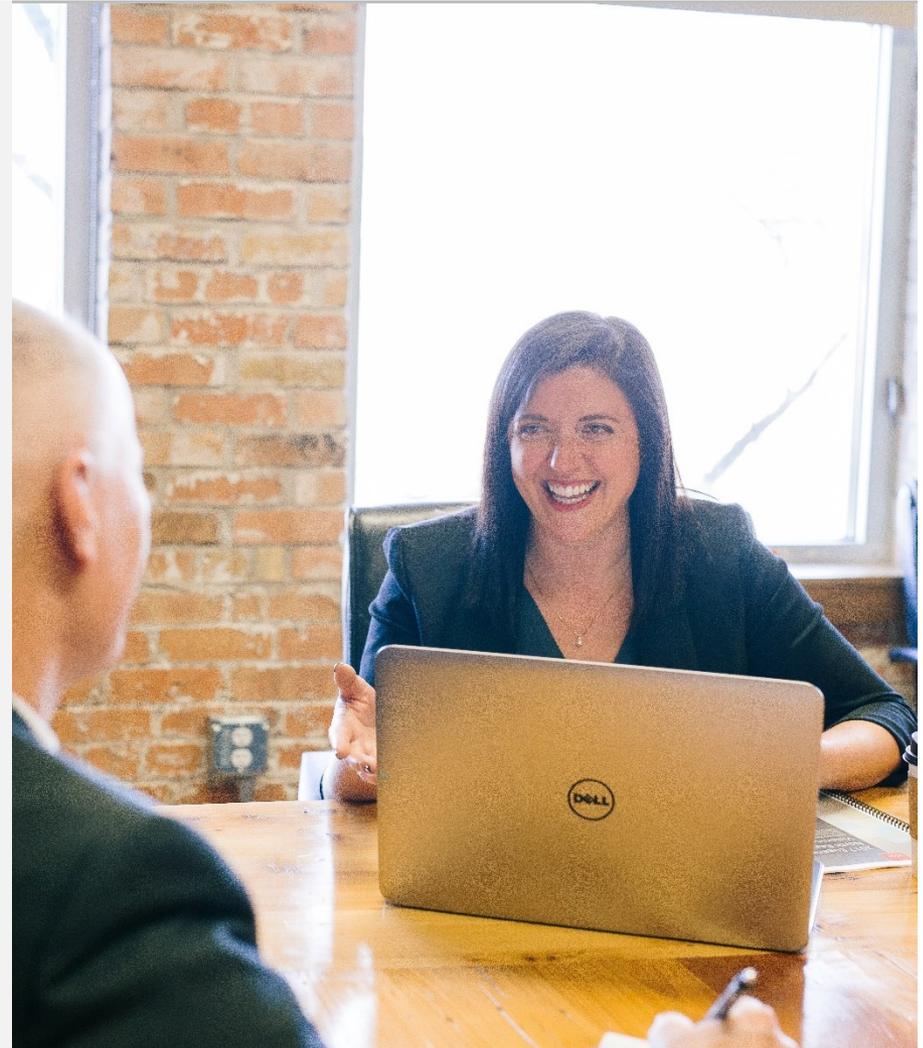
## French buyers' expectations (1/2)

- 70% of the sample will contact and use DMOs services in 2021. With all the changes due to the pandemic, buyers will request information about the destinations, especially about sanitary regulations and local initiatives.
- Furthermore, French event organizers will need more than ever updates about local providers (hotels, venues, transports, DMCs, ...), particularly about those that have been affected by the crisis, and potentially the new ones. They will need to identify new potential local partners, and in some cases rebuild a certain relationship of trust with their current providers.



## French buyers' expectations (2/2)

- After months of virtual actions such as webinars, virtual meetings and tradeshows, French MICE buyers look forward to attending again physical events. The most expected actions are the familiarization trips and physical events, including networking meetings, lunch sessions and afterworks.
- Webinars and newsletters remain in the Top 5 of buyer's favorite actions because they are still a valuable source of information and doesn't require a considerable time for buyers. 2020 showcased the benefits and possibilities that virtual events can bring, and these formats should subsist in the future.





## 1 Let's meet again!

Build and strengthen the relationship with buyers through networking events, after months of exchanges through screens. Share again some convivial moments to re-connect with French event organizers and spread a positive and optimistic image of the destination. To set up as soon as it's allowed again.

## 2 Back to the familiarization trips

Showcase the local initiatives to guarantee the safety of delegates. Demonstrate how a destination has been able to adapt its MICE offer to the new world. Experience the new welcome conditions of a destination. Reassure event organizers for them to project their future events there.



### 3 Webinar 3.0

Innovate, attract and surprise buyers with new and original formats of webinars. Incorporate interactive animations to involve as much as possible the buyer. No more “passive” presentation. Possibility to adopt the hybrid format as well. Let’s explore new ideas!

### 4 More collaborations

Diversify partners, involve a greater diversity of local providers in DMOs promotional actions to show the solidarity of all MICE stakeholders of a destination, and to promote a wide range of complementary services and products. Reduce the number of solicitations from many different providers to optimize the time allowed by the buyers, and especially to avoid exhausting them.

# Contact us!



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