



Interface MICE market study

Buyer expectations & 2024 forecasts in the French MICE market

Summary

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Context & features of the survey

Survey

80 buyers

MICE professionals who participated in the survey

January 2024

Period of the survey

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



MICE agencies (57%)

Travel agencies with MICE activity (25%)

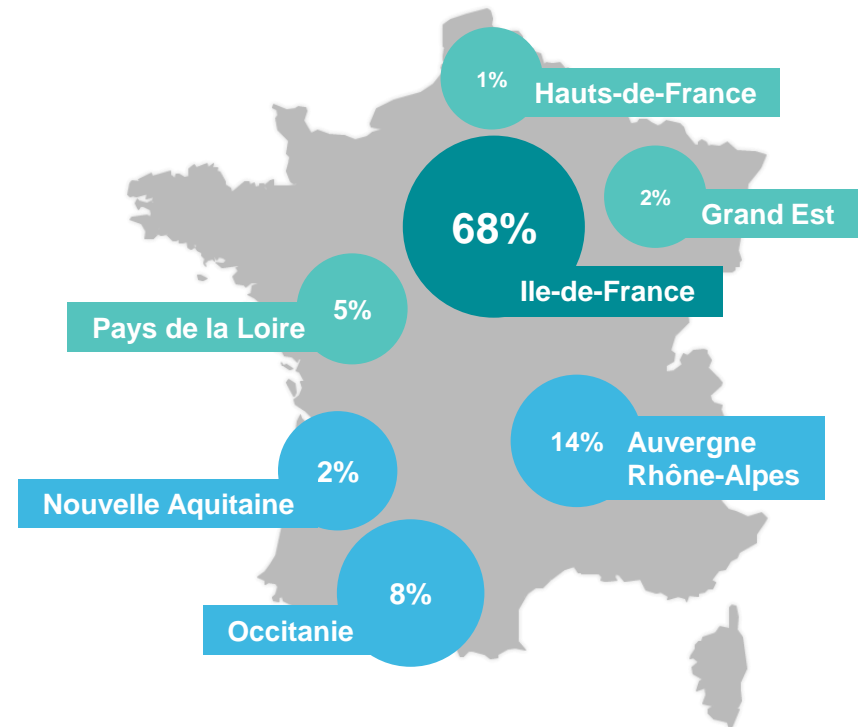
- Corporate Meeting Planners (8%)
- Freelancers (5%)
- Communication agency with MICE activity (2%)
- Tour operators with MICE activity (1%)
- PCO (1%)
- International associations (1%)



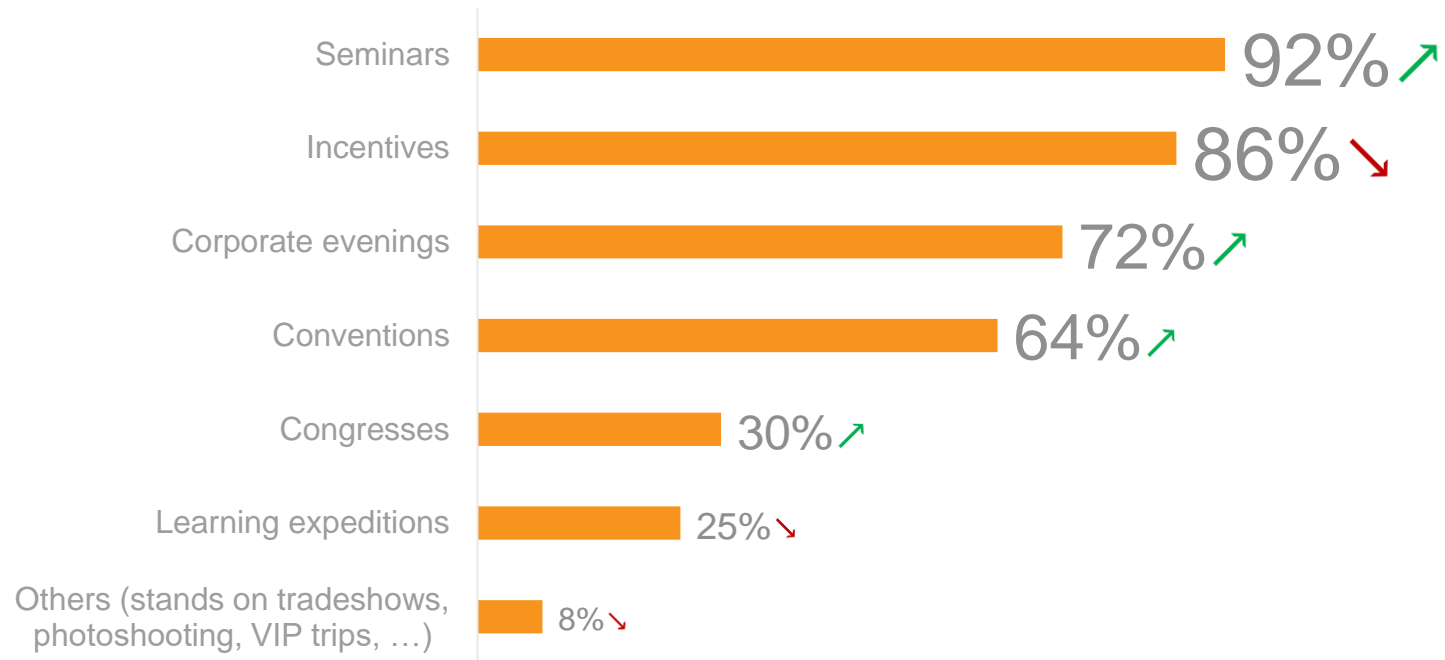
CEOs (39%)

Event Directors (28%)

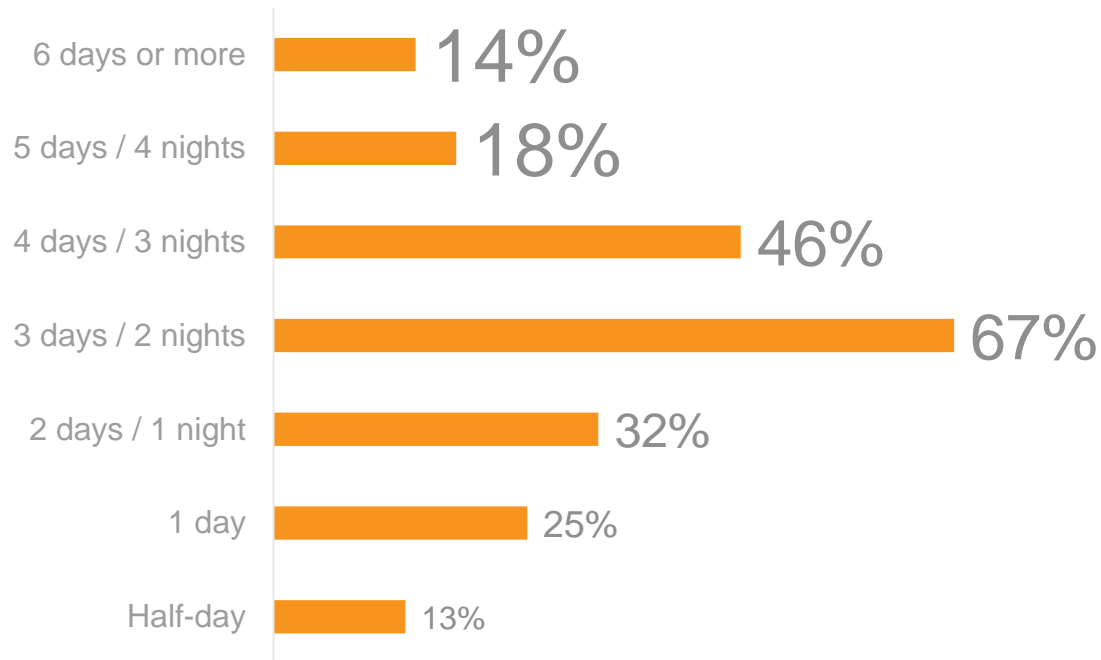
- Project Managers (20%)
- Corporate Event Managers (9%)
- Freelancers (4%)



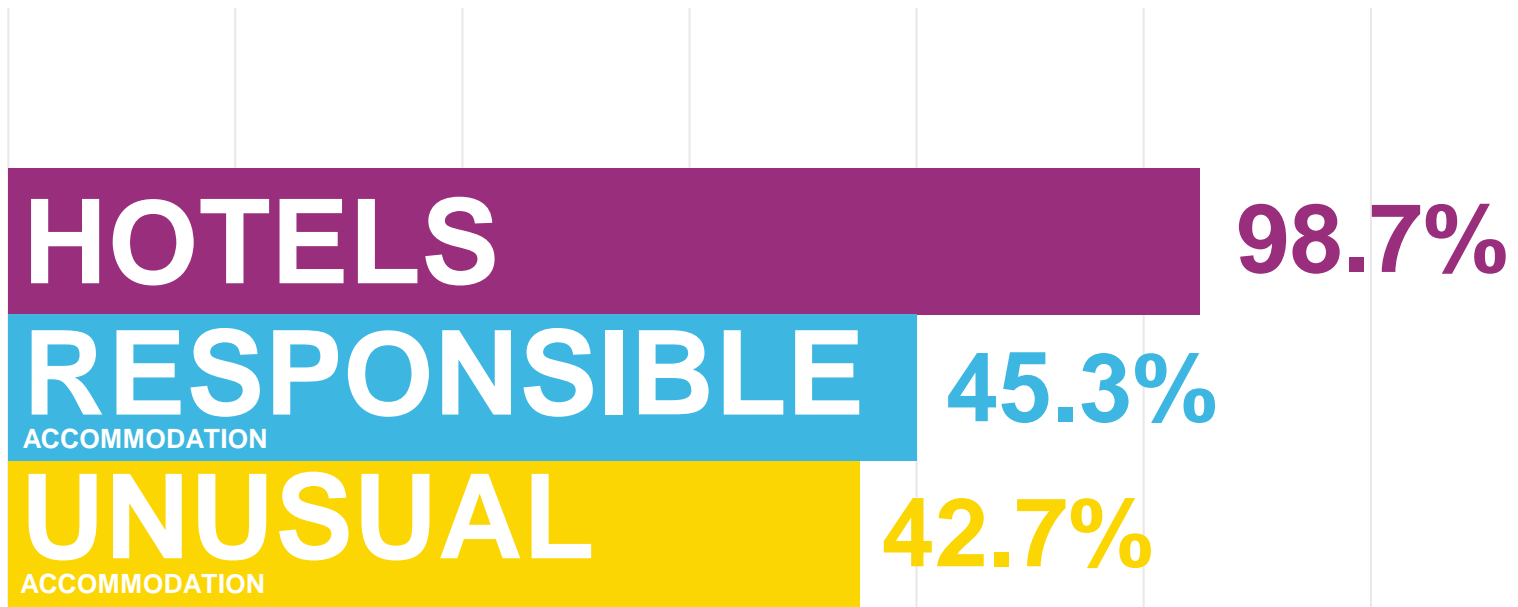
Type of events organized by the sample in 2023



The duration of events organized by the sample in 2023



Types of accommodation used most frequently by companies for their business events



Also mentioned by the panel: Accommodations with large meeting places (1%)



1. French MICE market

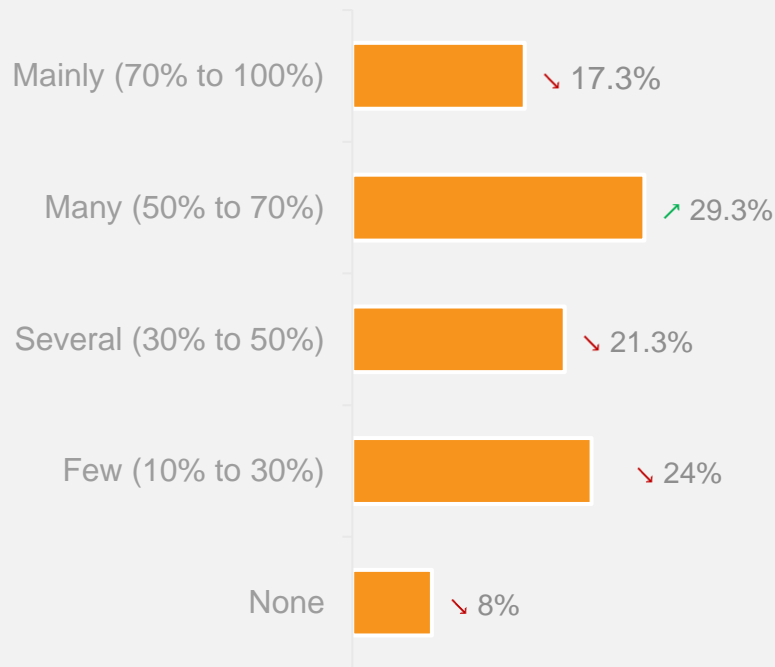
**2023 figures
& projections in 2024
and beyond**

Events outside France*

* Considering the context in January 2024

Events organized outside France in 2023

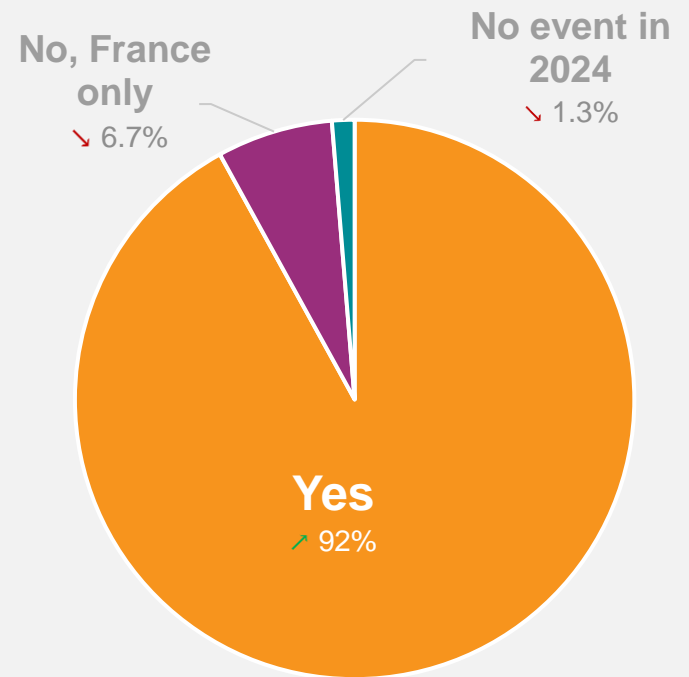
2
0
2
3



↑ ↓ compared with 2022

Plan to organize events outside France in 2024

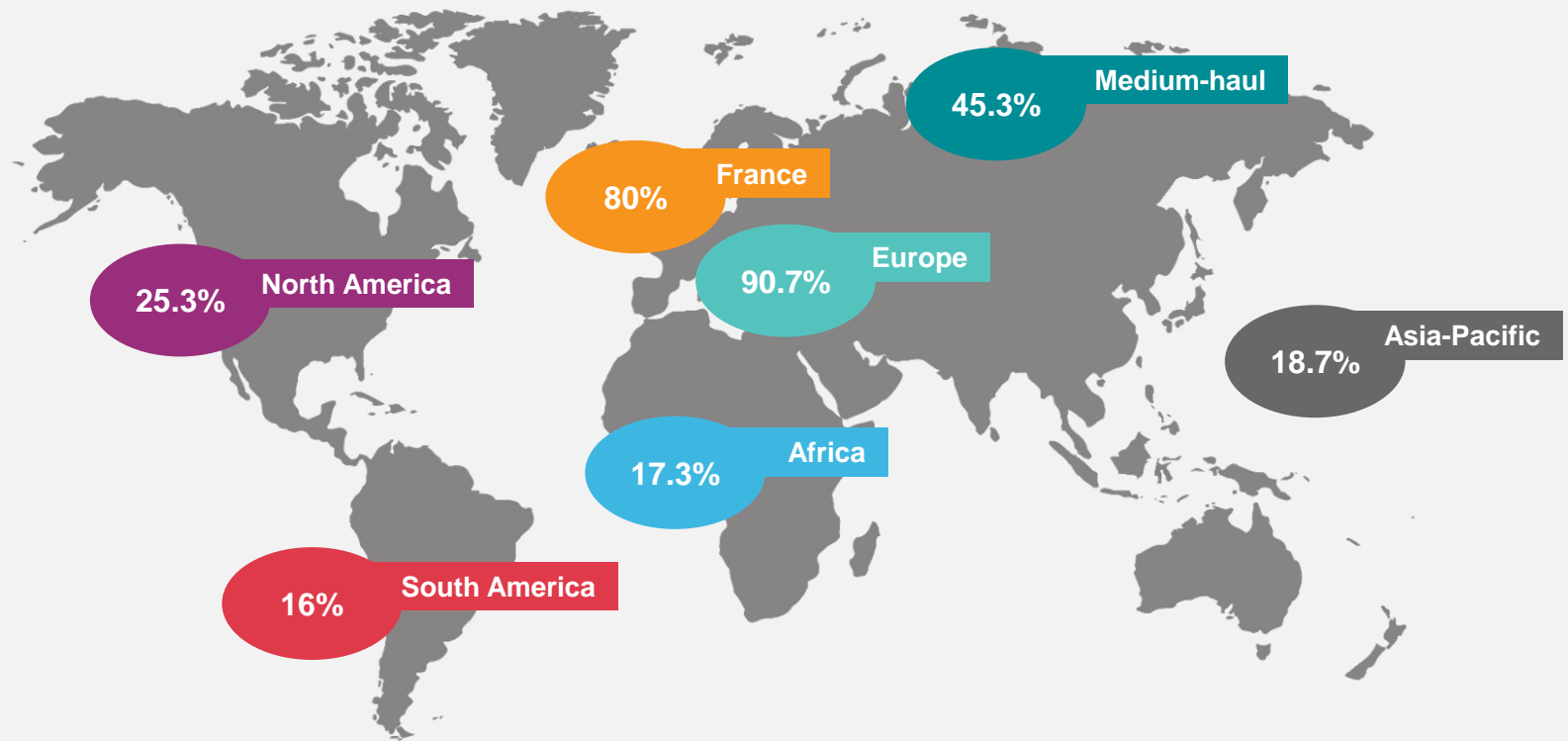
2
0
2
4



↑ ↓ compared with 2023

Chosen destinations for 2023 events

Survey



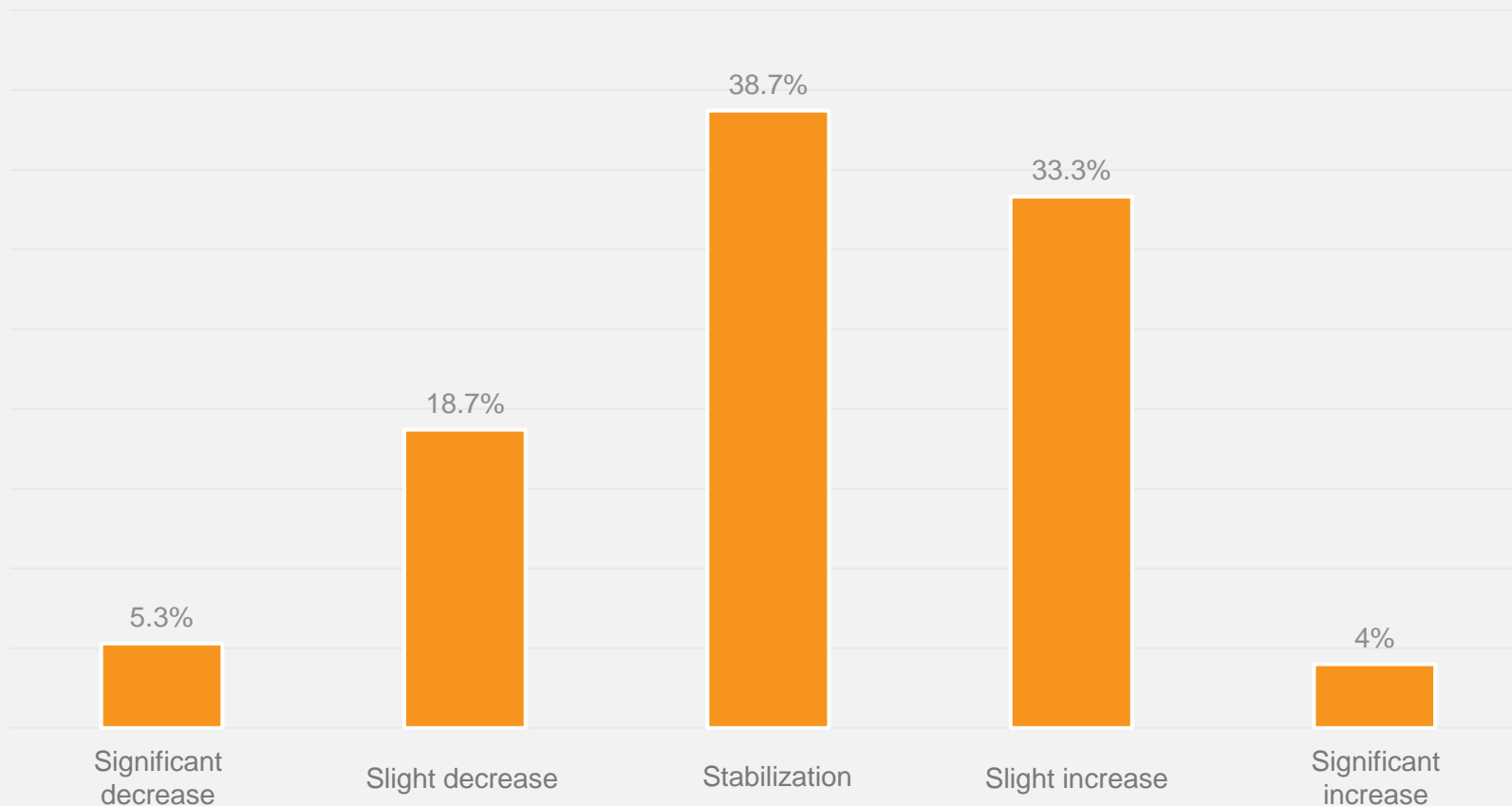
Comparison with 2022 events

France ↗ (80% vs 78.8%), Europe ↘ (90.7% vs 90.9%), and Medium-haul ↘ (45.3% vs 51.5%). Other destinations were not included in the 2023 survey.

Level of business in 2024 compared with 2023

Survey

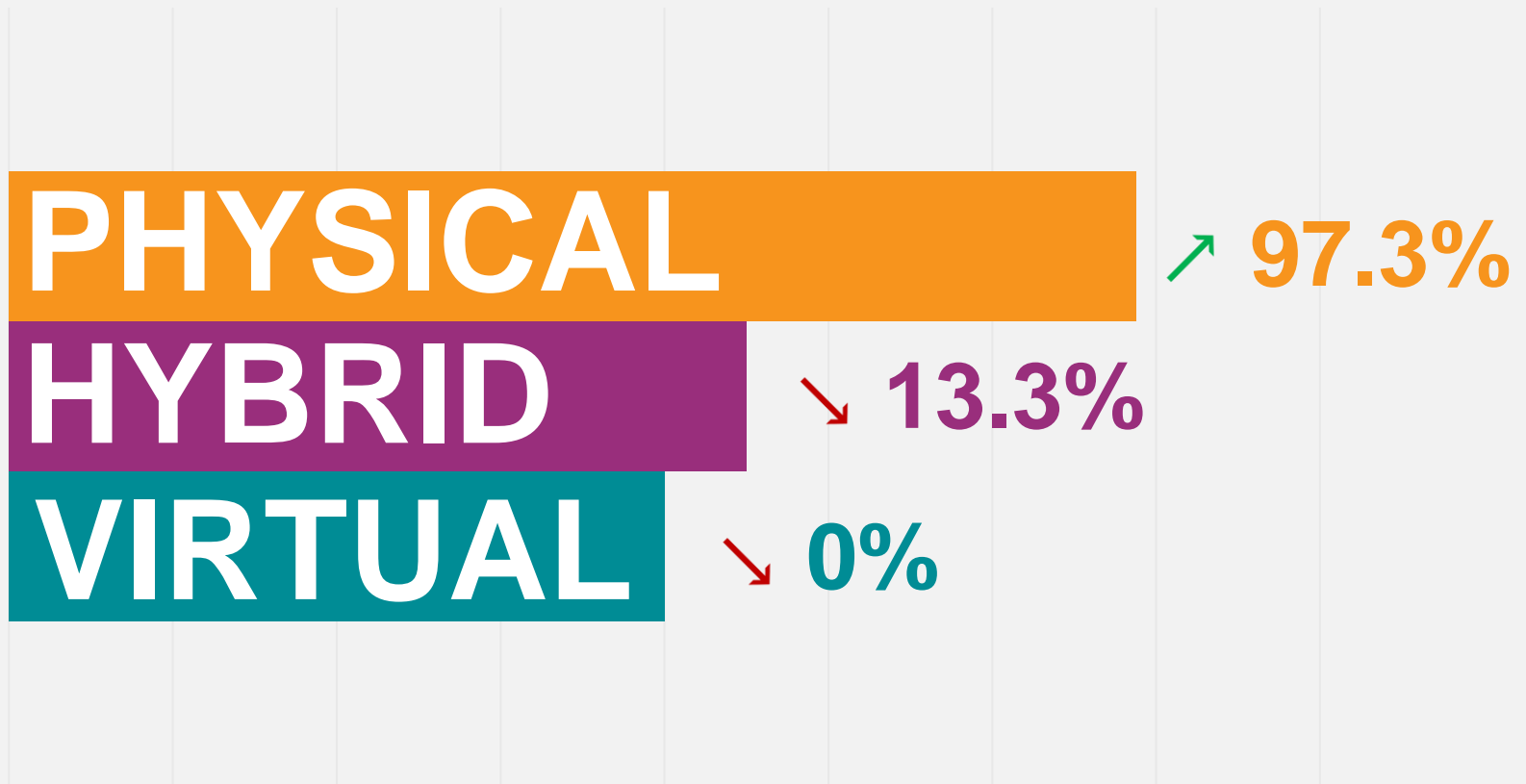
Evolution of business in 2024 (projection) vs. 2023



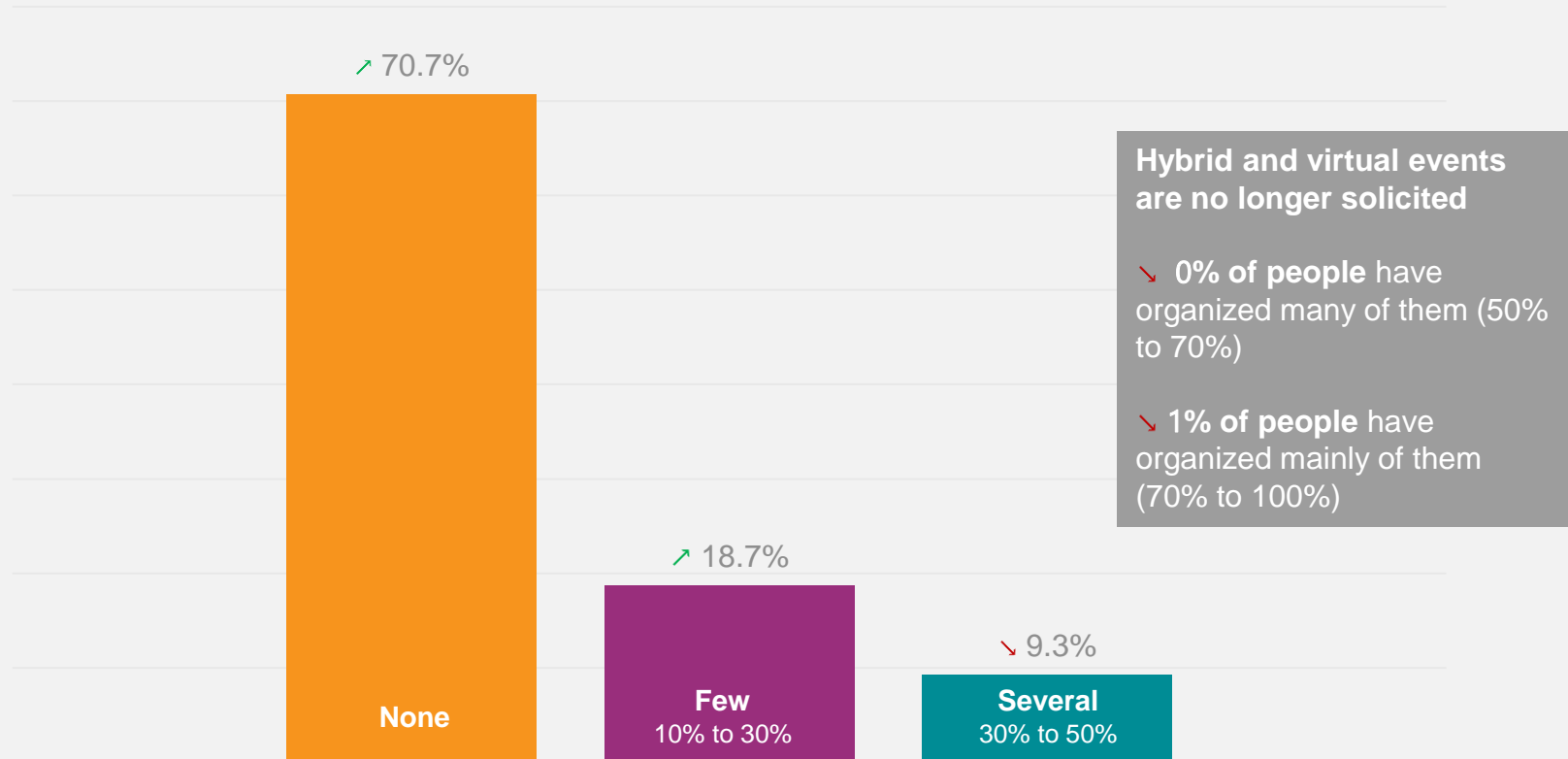
Event formats in 2024 (projection)

Survey

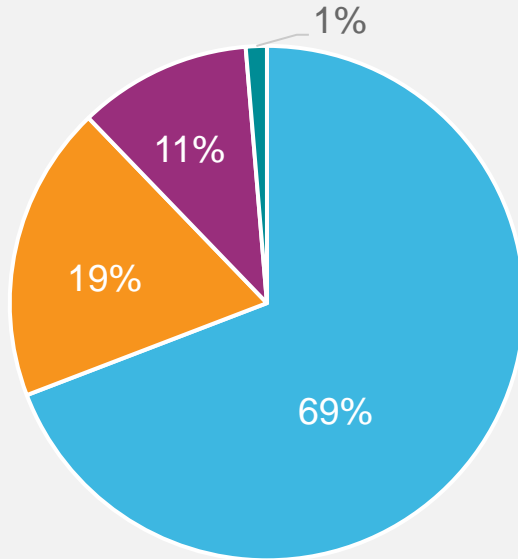
Event formats



Hybrid and virtual events organized in 2023



According to you and your clients (if agency), why physical events and meetings are still useful and essential?



Getting together / enjoying shared moments



Easier communication / better brainstorming



Team-building / bonding a team



Face-to-face meetings are not always essential

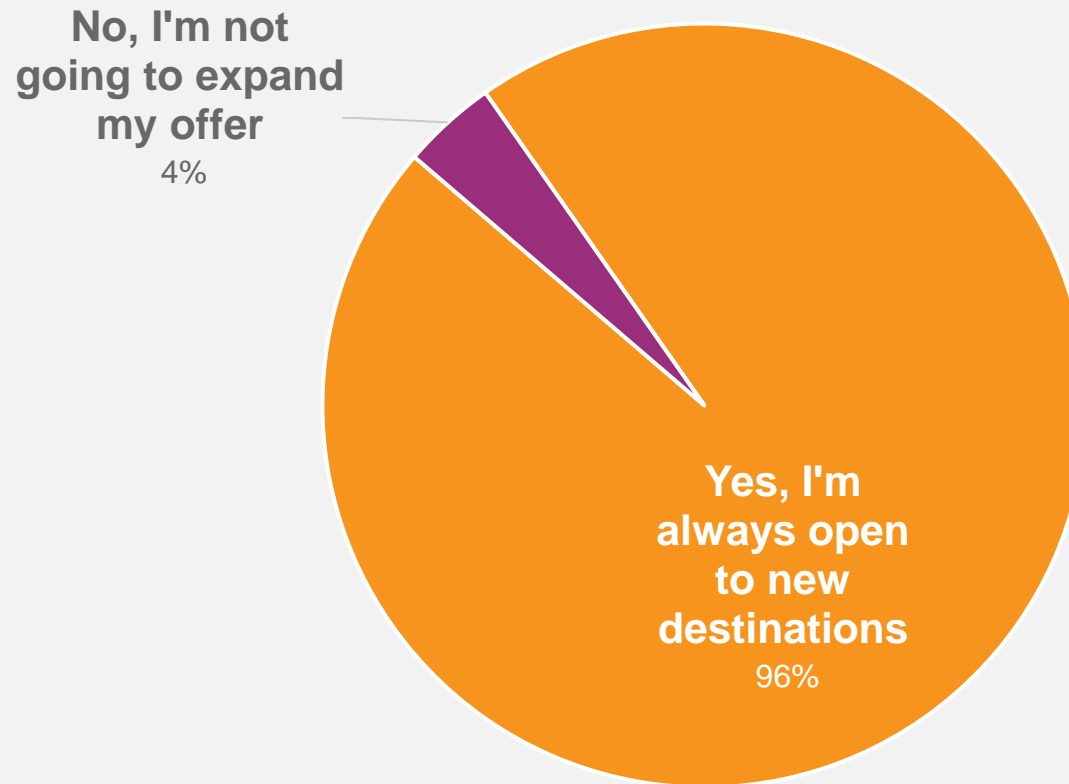
Also mentioned by the panel: Meet new recruits during Covid (1%)



2. Which destinations

for business events
in 2024?

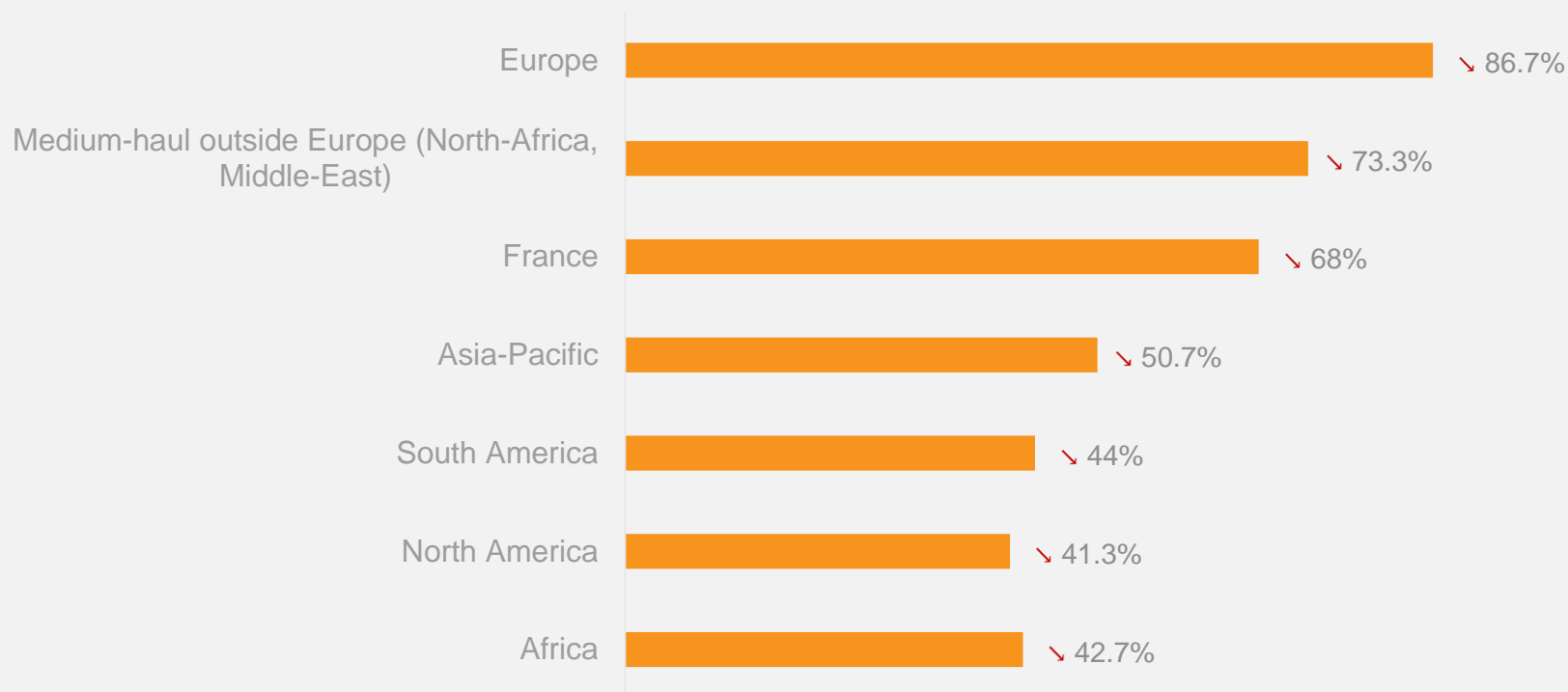
Are you planning to explore new destinations in 2024?



Destinations with more interest from French MICE buyers in 2024

Survey

Request for information and updates in 2024



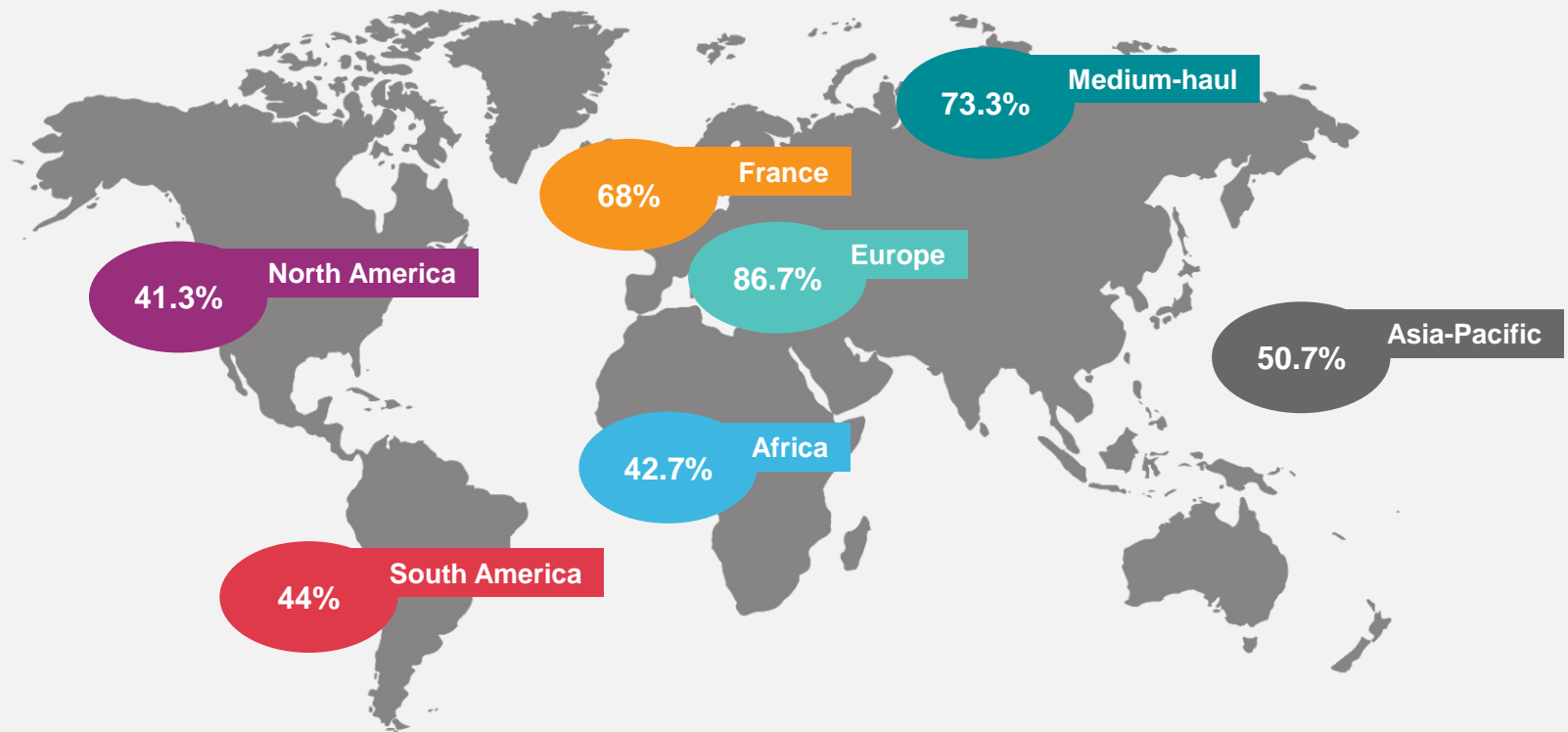
Comparison with 2022 events

↘ Every destination is in decrease, but it is linked to the global interest to travel internationally and not only in France and Europe anymore.

Destinations with more interest from French buyers in 2024

Survey

The same data as the previous page but presented in a different way



Comparison with 2022 events

↘ Every destination is in decrease, but it is linked to the global interest to travel internationally and not only in France and Europe anymore.

A person wearing a blue jacket, a pink beanie, and an orange backpack is walking away from the camera on a wooden bridge. The bridge spans a river and is surrounded by a dense forest with trees in various shades of green and yellow, indicating autumn. The scene is captured from a low angle, looking down the length of the bridge.

3. Destination selection criteria and CSR aspects

Importance of destination selection criteria

Survey

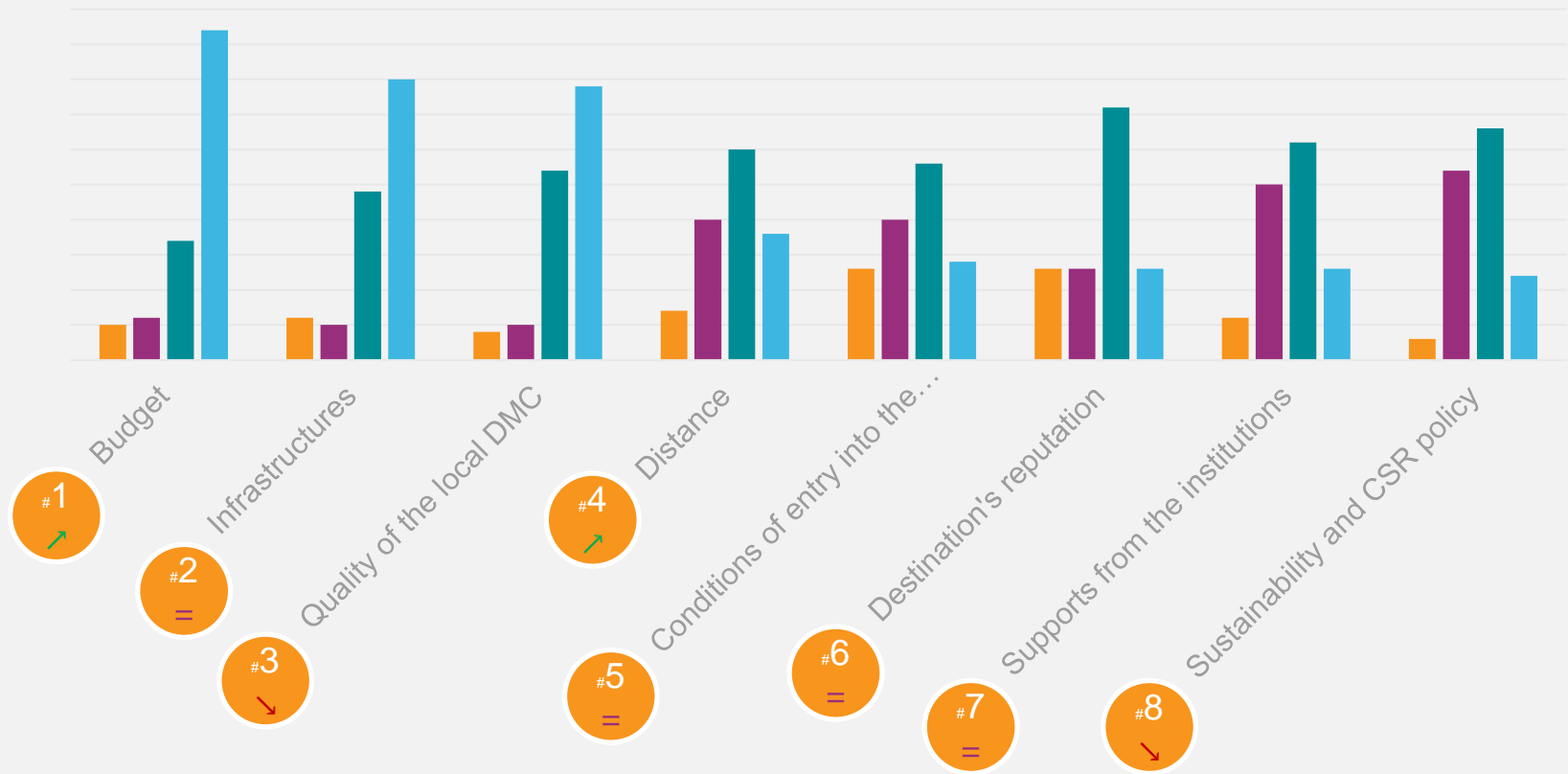
The degree of importance of criteria in the process of selecting a destination

↗ ↘ = rank compared with 2023

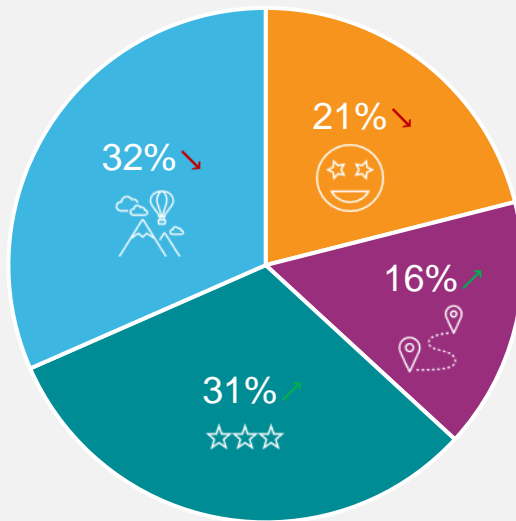
Less important

1 2 3 4

Decisive



Other criteria mentioned by the sample



Uniqueness / originality / MICE exclusivity of the destination



Attractiveness of the destination (climate, nature, etc.)



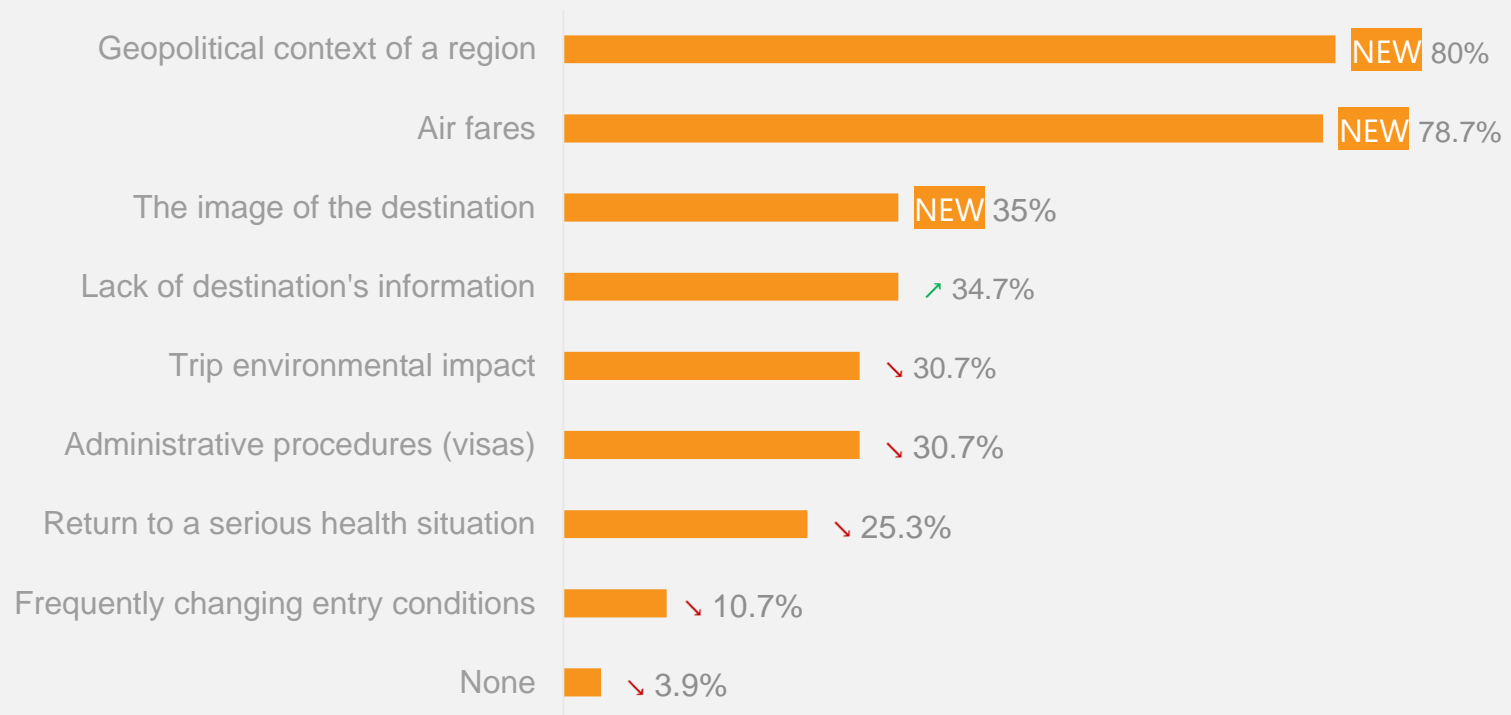
Accessibility of the destination



Service quality of the destination

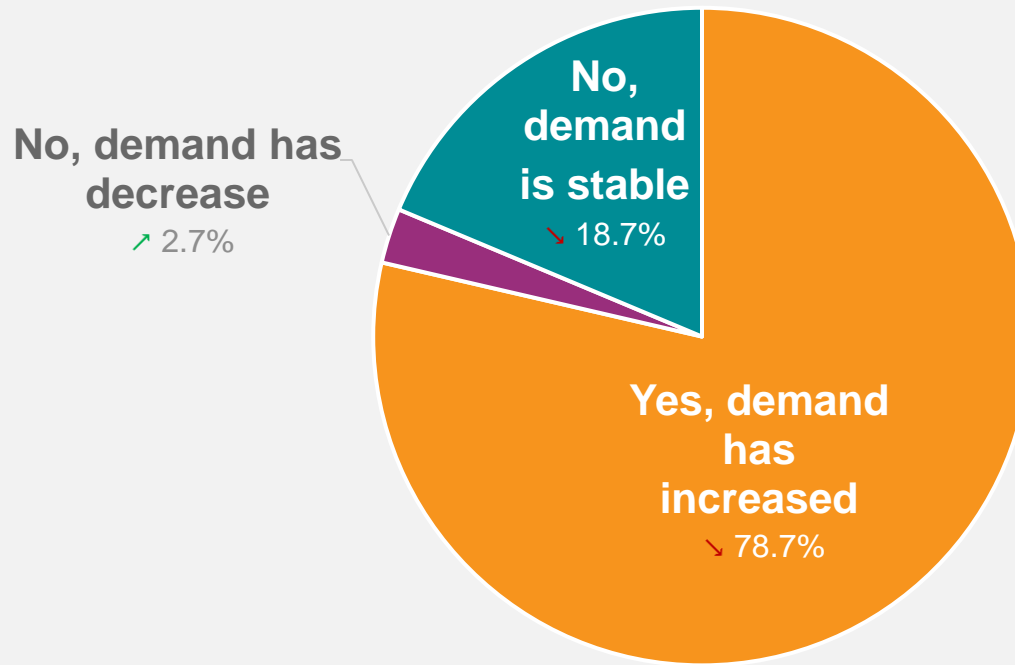
Important criteria for selecting a destination / the discouraging factors

Conditions that discourage events abroad in 2024



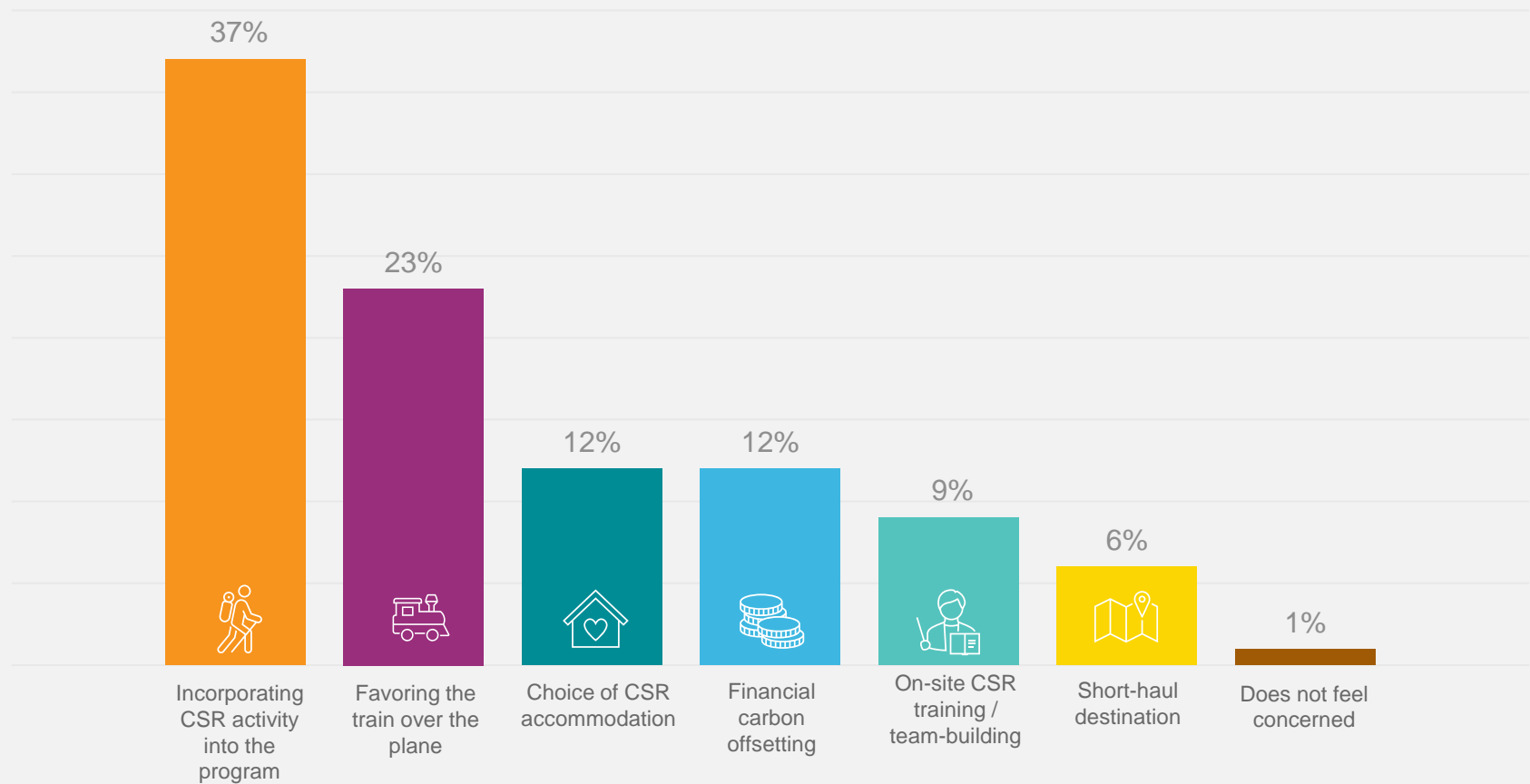
Important criteria for selecting a destination / the CSR impact

CSR aspects are increasingly in demand in events and corporate travel. Do you agree with this information?



Important criteria for selecting a destination / the CSR impact

How do you integrate CRS initiatives into your business events?

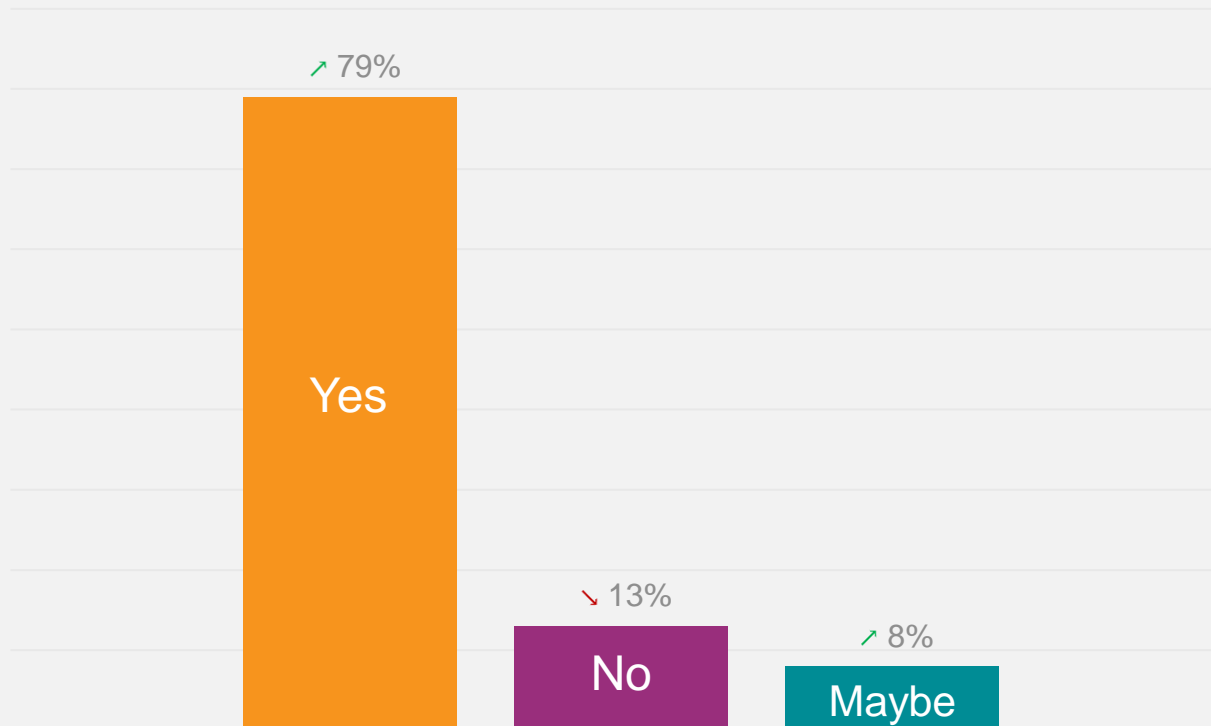




4. The French MICE buyers and DMOs*

*Destination Management Organization

Will you use DMOs services in 2024?



Why yes?

- ↗ 48% - Request for general information
- ↘ 24% - Research for providers (hotels, venues, ...)
- ↘ 15% - Collect new ideas for events (format, thematic, ...)
- NEW** 5% - Potential financial assistance
- NEW** 4% - Help with organization and time saving

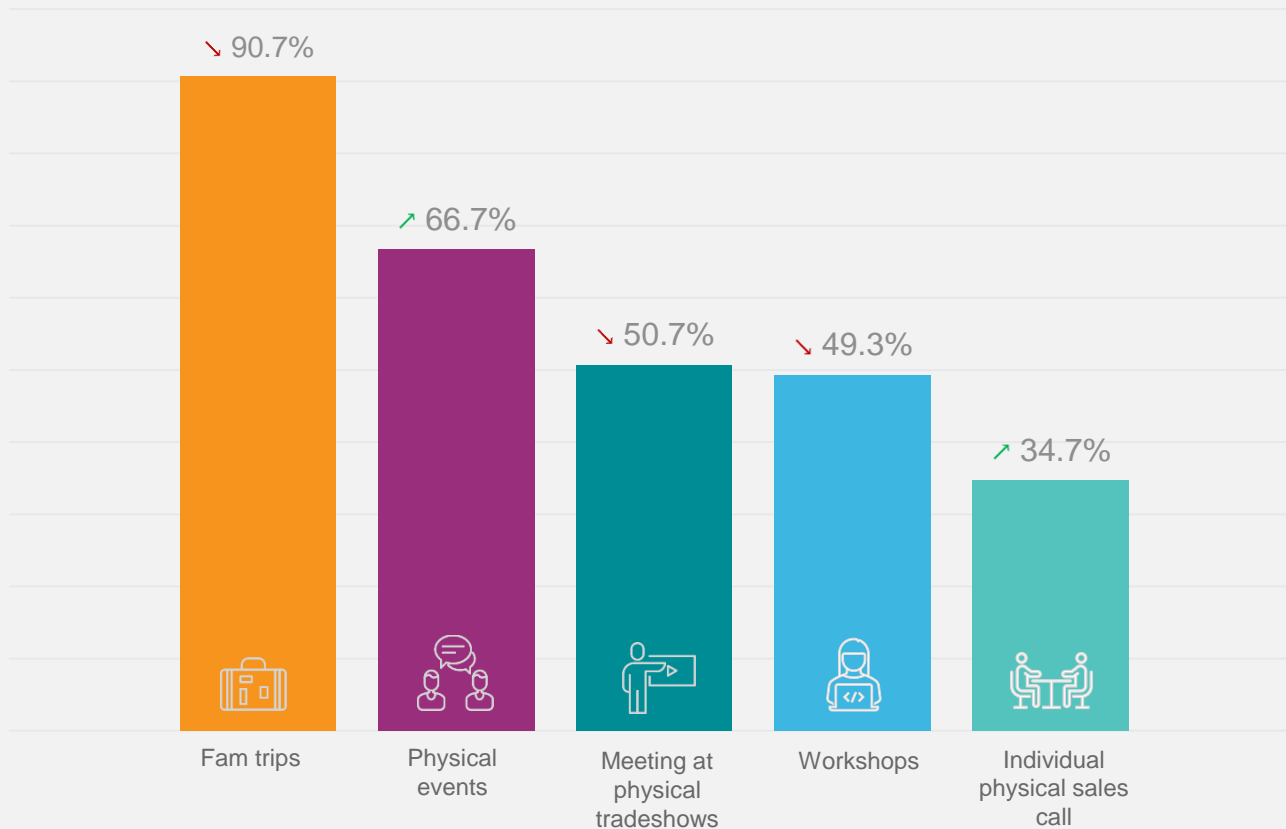
Important criteria mentioned by the sample who answered “No” or “Maybe”



The marketing actions most appreciated by French MICE buyers

Survey

Top 5 of favorite actions set up by DMOs



Other actions

appreciated by buyers:

- ↑ 33.3% - Newsletters
- ↑ 20% - Webinars
- ↓ 10.7% - Individual virtual sales call

French MICE buyer preferences

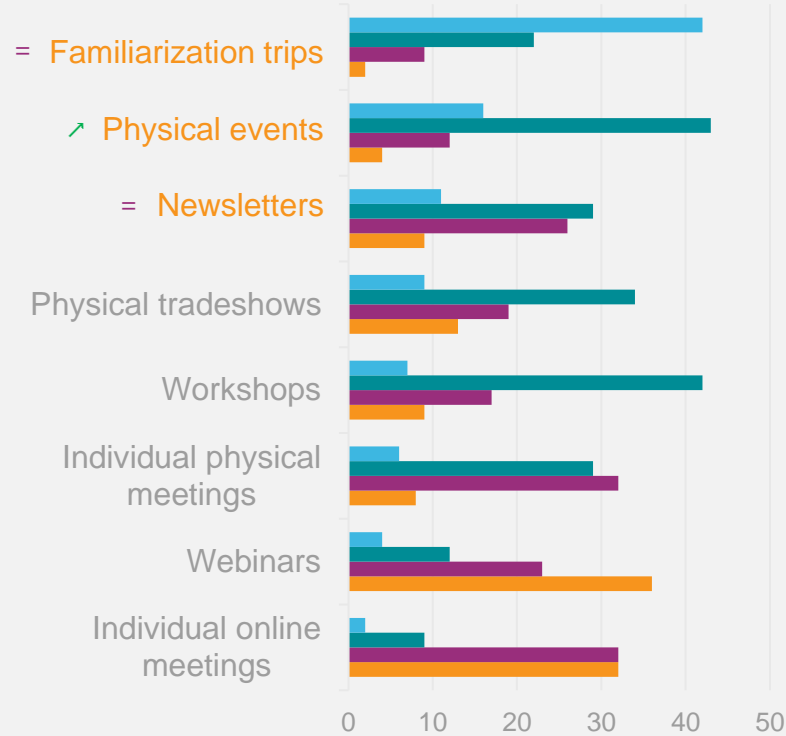
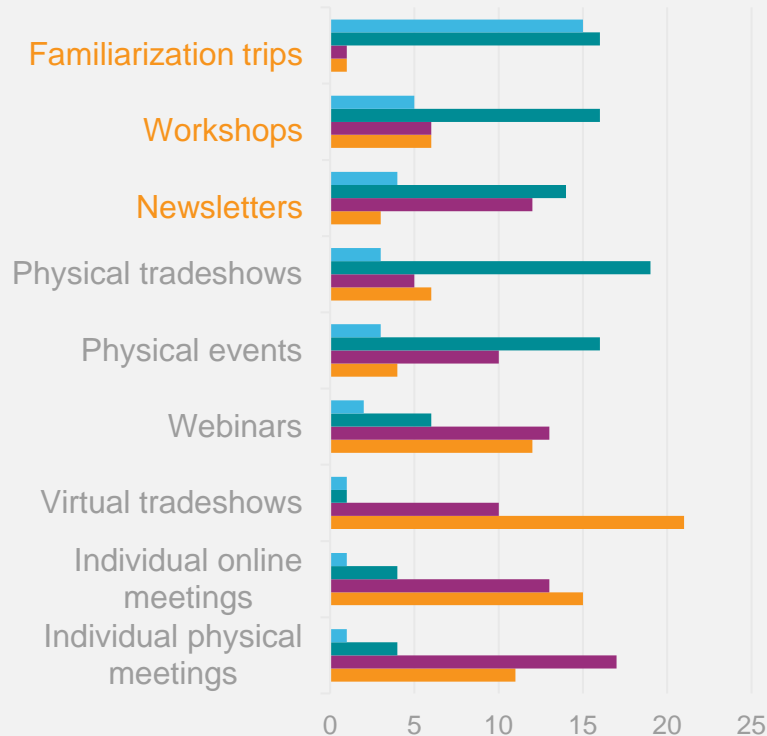
Survey

In 2023

In 2024

Buyers wanted **more...**

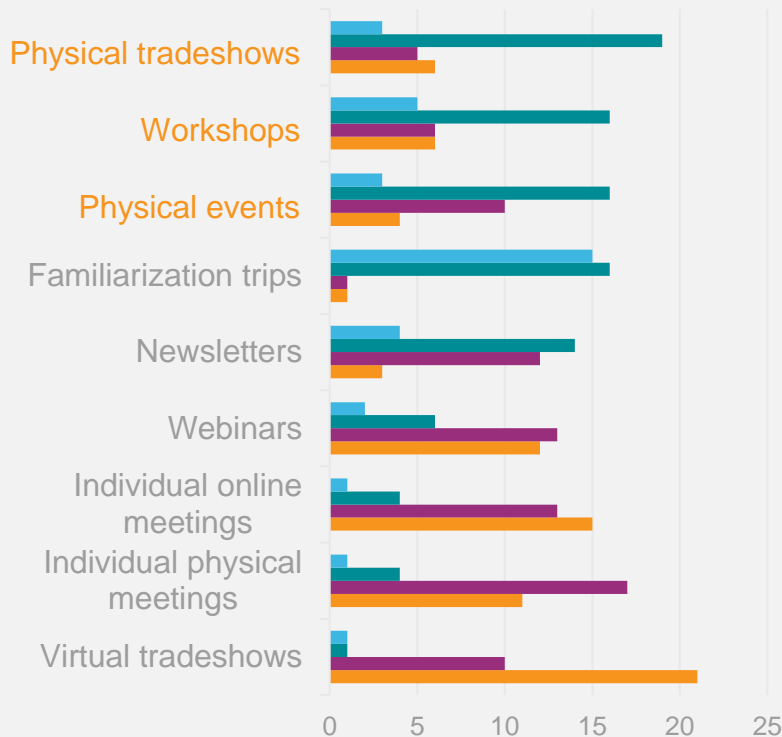
Buyers want **more...**



■ I want more! ■ I like it ■ Why not ■ Not interested anymore

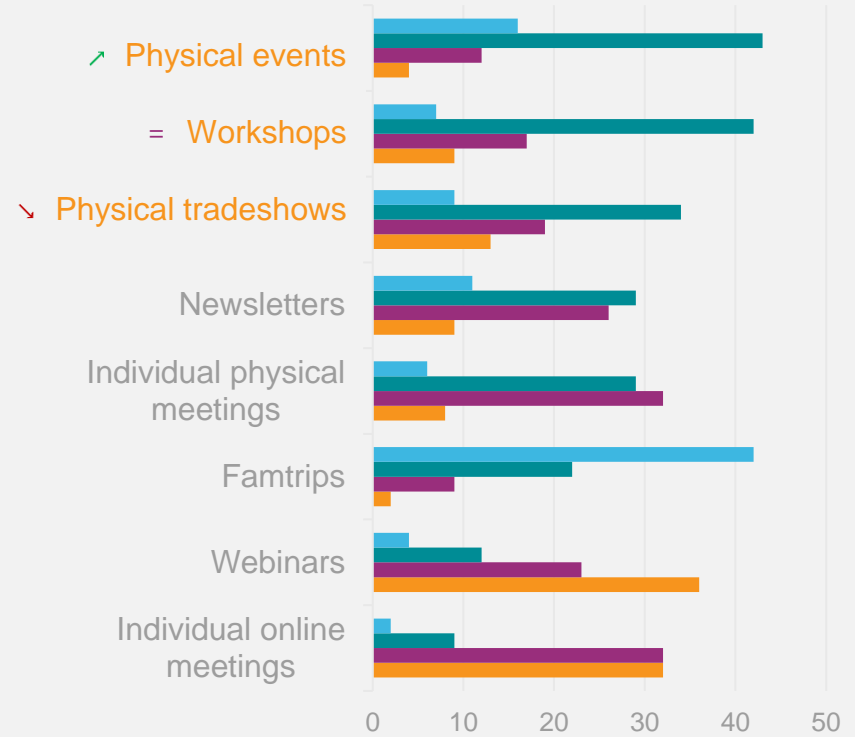
In 2023

Buyers liked...



In 2024

Buyers like...



■ I want more! ■ I like it ■ Why not ■ Not interested anymore

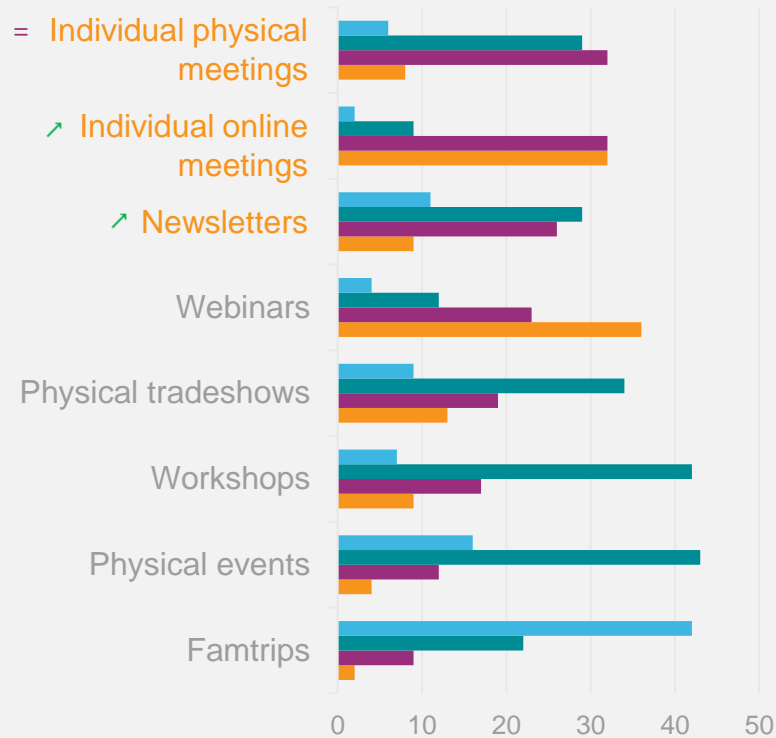
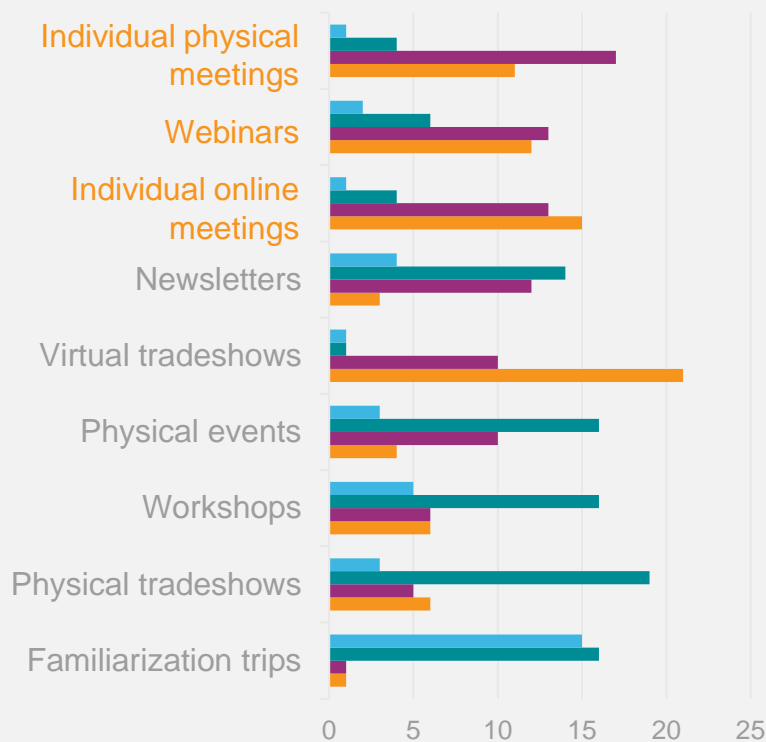
French MICE buyer preferences

Survey

In 2023

In 2024

Buyers were **ok** with... Buyers are **ok** with...



■ I want more! ■ I like it ■ Why not ■ Not interested anymore

French MICE buyer preferences

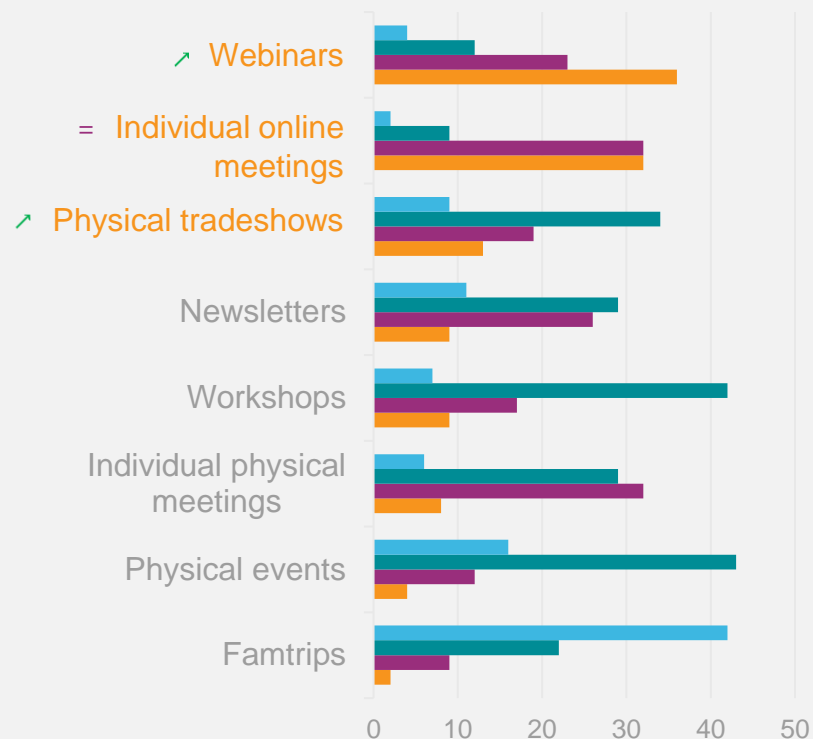
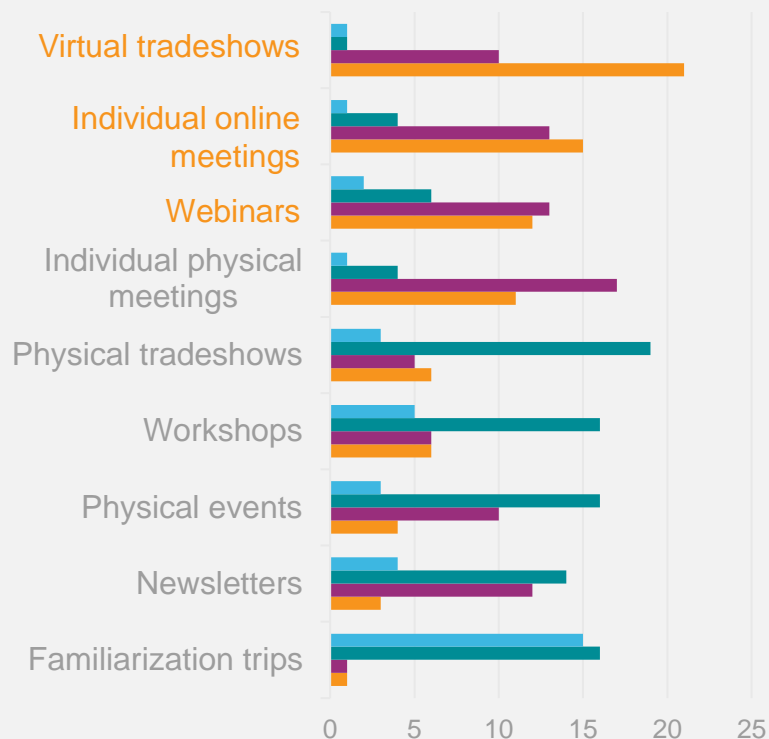
Survey

In 2023

In 2024

Buyers wanted **less...**

Buyers want **less...**



■ I want more! ■ I like it ■ Why not ■ Not interested anymore

In conclusion...



Meetings in person has never been so important ^{1/2}

- After a strong increase of online and hybrid events due to the Covid-19 health crisis, this trend is **slowing down** and the desire to get together continues to grow.
- This desire is reflected in our study, which again shows a very slight increase in face-to-face events (from 97% to 97.3%), but above all a **significant decrease in hybrid and virtual events**, from 21.2% to 13.3% and from 9.1% to 0% respectively in the 2024 projections. The results for past 2023 events are also **in the same line**.



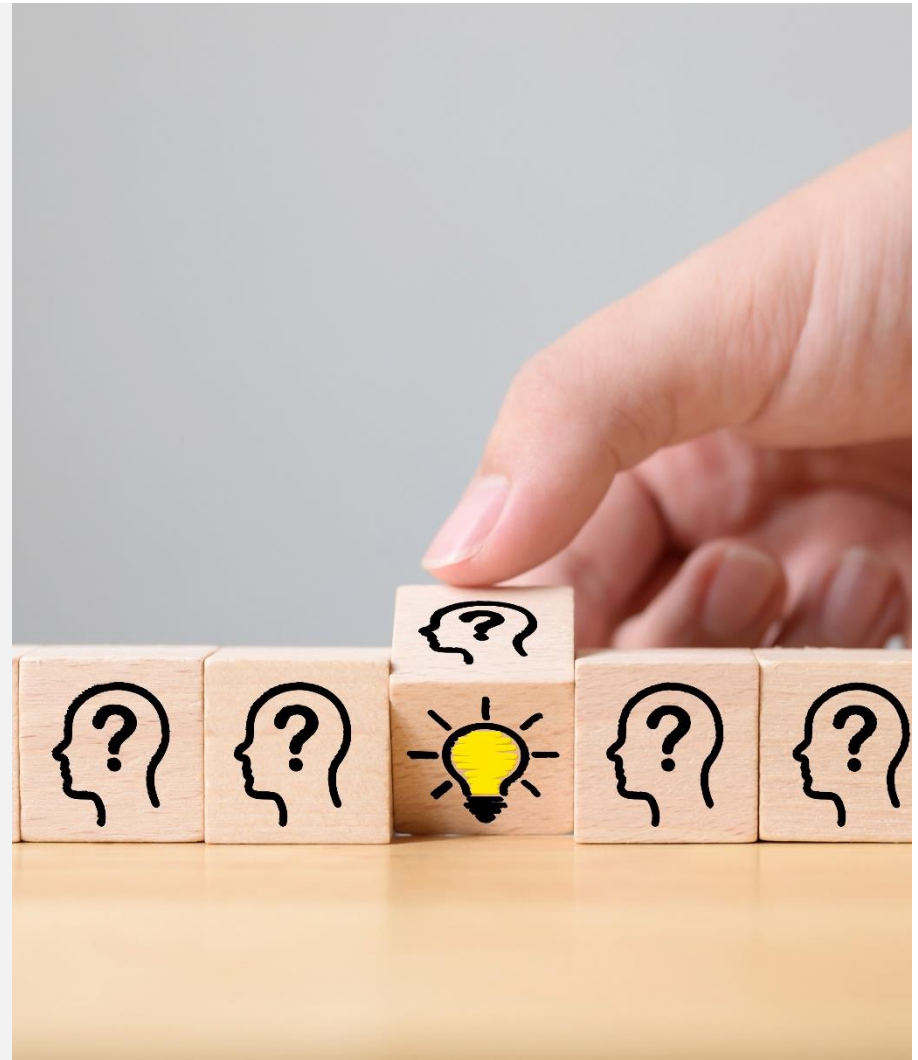
Meetings in person has never been so important ^{2/2}

- **Physical events and meetings** remain useful and essential for many reasons: getting together and enjoying shared moments (69%), easier communication / better brainstorming (19%), team-building / bonding a team (11%) and meet new recruits during covid (1%). For only 1% of the panel, face-to-face meetings are not always essential.
- The **digital withdrawal** is also evident in buyer's favorite marketing actions, with individual virtual sales calls dropping from 15.2% to 10.7%.



DMOs need to reinvent and challenge themselves ^{1/3}

- French MICE buyers still expect a great deal of support from their DMOs, as we highlighted in our previous study. **DMOs** need to be inventive, reactive, anticipatory and **ahead of the game**.
- 79% of those surveyed **plan to use DMOs in 2024**, particularly for destinations they know little or nothing about and for which they need general information (48%). Putting them in touch with providers and providing inspiration for new event formats are also essential.



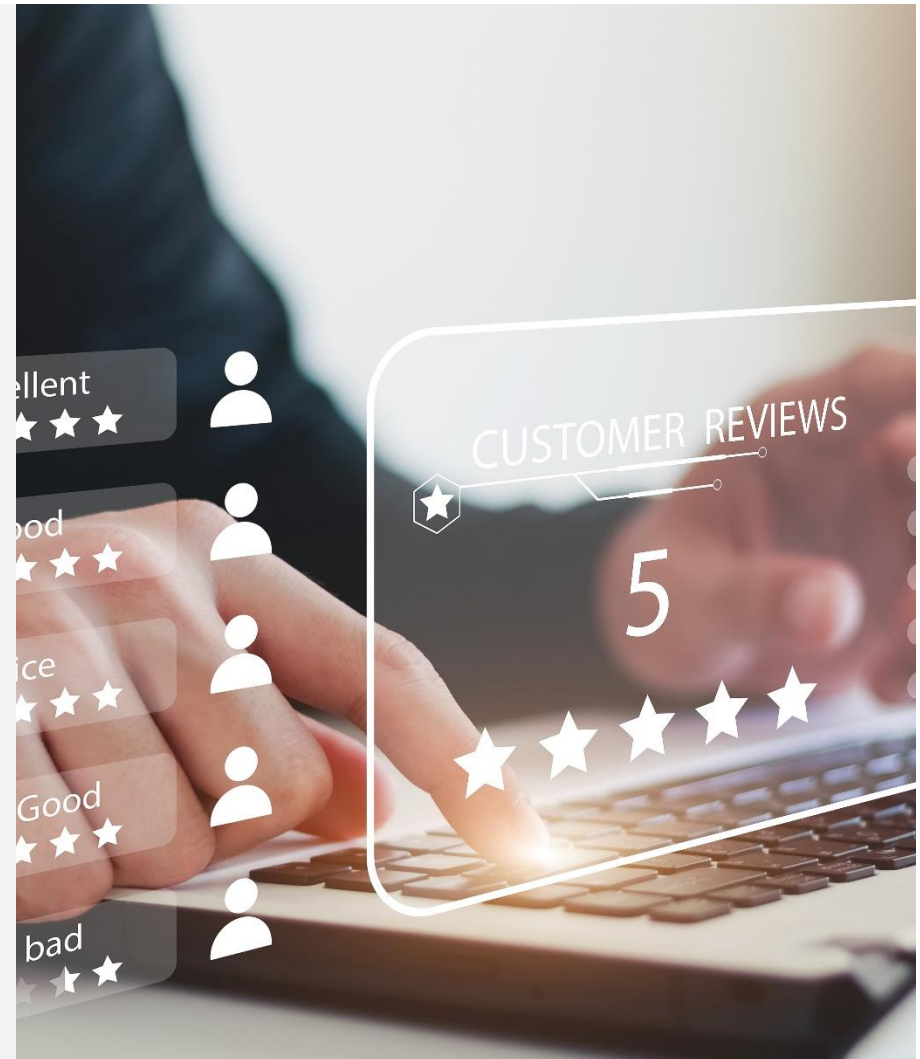
DMOs need to reinvent and challenge themselves ^{2/3}

- Two new points emerged during this study: potential **financial assistance** and help with organization are necessary.
- It's essential to **innovate and inspire**, especially for destinations with a low awareness rate in the targeted MICE market. Differentiating from the other destinations and offering an alternative, something different, new, and unique are necessary to generate interest from French event organizers and French MICE agencies.



DMOs need to reinvent and challenge themselves ^{3/3}

- According to the surveys, respondents who do not or rarely use DMOs have had **negative past experiences** such as a lack of qualified staff / irrelevant information on their part (58%), no personalized / original and exclusive products for MICE (17%) and too long a response time (9%). Only 16% of respondents do not use DMOs **because they already know the destination well**.
- A major effort will therefore have to be made to **improve service quality** by 2024.



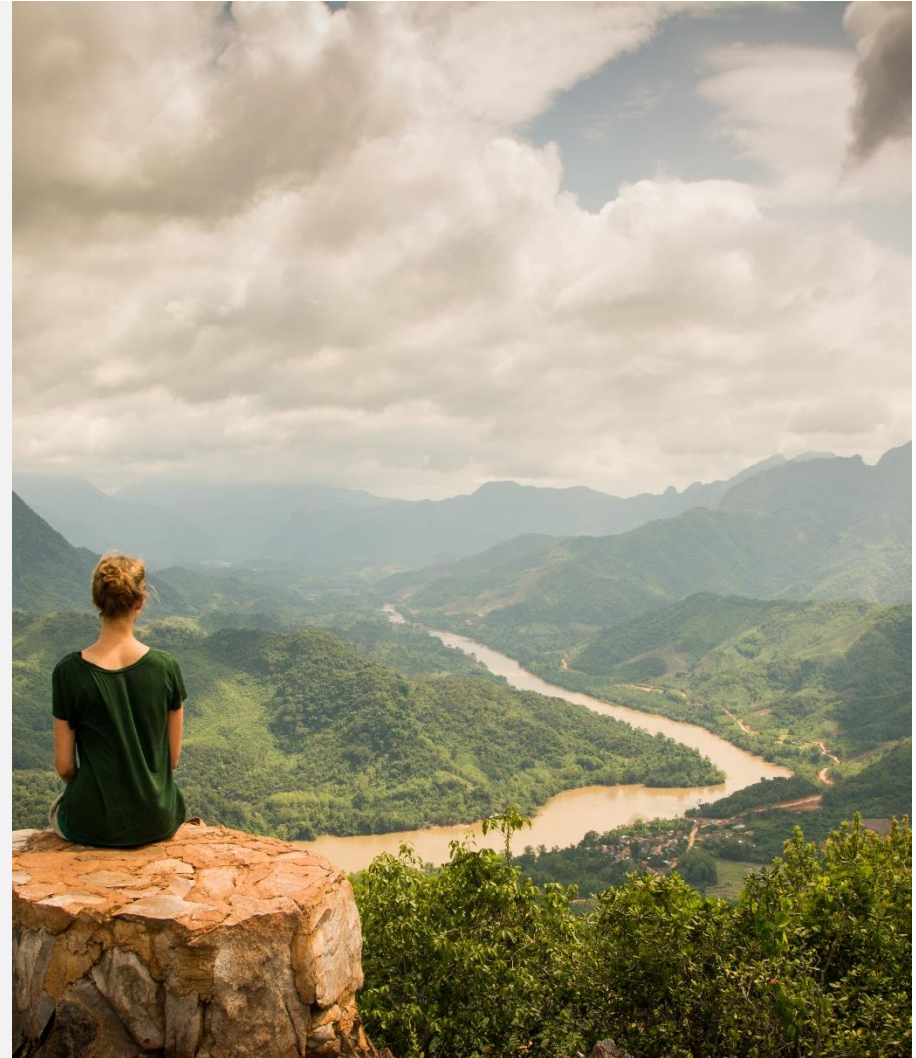
CSR has taken its place in the MICE ecosystem ^{1/2}

- After a meteoric rise to prominence, CSR is set to make its mark on events and business travel in 2023. Today, it is taking its rightful place and should become an **automatic feature** for destinations.
- This is reflected in the choice of accommodation, with one in two respondents choosing **CSR accommodation** rather than another.



CSR has taken its place in the MICE ecosystem ^{2/2}

- Sustainability and CSR policy are also important criteria when choosing a destination. It can represent a discouraging element from choosing an initially considered destination. So, for long-haul destinations, for example, it is crucial to **offer responsible alternatives** once the group is on the ground.
- The most frequent initiatives to limit this aspect include incorporating **CSR activity** into the program (37%), **favoring the train** over the plane (23%), and financial **carbon offsetting** (12%), as well as **accommodation** choice.



2024 trends: all destinations have equal opportunities

- In 2023 we have returned to pre-Covid levels, which have even been exceeded for a significant part of French MICE agencies. We therefore expect a stabilization or even a slight increase for the coming year.



2024 trends: all destinations have equal opportunities

- In recent years, **France and Europe** have regained a large share of the market due to the inaccessibility of many destinations. Buyers' interest in the 2024 events will focus more on **short-haul** (86.7% Europe) and **medium-haul** (73.3% North Africa and the Middle East). **Long-haul** destinations continue to be of interest (41.3% to 50.7%).
- This shows real potential to **make the most of the situation**, as demand is widespread, and respondents are open to new destinations (96%).





1 Offer exclusive and high-quality MICE activities

Quality of service is crucial when choosing a destination, as are exclusive MICE activities. To meet needs as effectively as possible, destinations and partners need to develop an exclusive, top-of-the-range destination offering specifically for MICE, with a range of unique venues, activities and experiences. The end customer must feel privileged!

2 Improve the quality of the processing of requests

DMO's should be a real support for event organizers. This study has highlighted a real need in the world of tourism, an industry where it is essential to provide very high-quality services. Destinations and partners need to be more responsive, innovative and helpful.



3 Think CSR on every trip

After several years of growing demand, CSR is now a matter of course for most customers. So, destinations and partners need to make a point of including this trend in events in a variety of formats, such as activities, hotels and service providers making a special effort on CSR.

4 Continuing to prioritize in-person activities

Fam trips, workshops, events, and meetings at trade fairs: these are the actions preferred by the respondents, and they are all in person. So, destinations and partners need to capitalize on these kinds of opportunities for discussion, while giving digital a smaller role. It should be noted, however, that virtual individual sales calls are still popular because they save time and allow to meet prospects in other geographical areas.

Contact us!



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