
East Asian MICE (Meeting/Incentive/Convention/ Exhibition) Travel

Based on the World Travel Monitor[®]

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Introduction

The objective of this report is to provide an overview of the demand seen for outbound and inbound MICE (Meeting/ Incentive/Convention/Exhibition) trips from / to East Asia, taken during the last year 2008.

The report is based on IPK's "World Travel Monitor[®]" data 2008. The "World Travel Monitor[®]" is a continuous survey measuring all overnight trips made by the adult inhabitants of up to 58 countries. For this purpose, respondents are representatively interviewed in more than 150 waves per year, regarding their trips during the last months. This totals to approximately up to 450.000 interviews per year. The results obtained from these polls representative of the population are extrapolated to the total population of each country. The "World Travel Monitor[®]" includes holiday trips, business trips, visits to friends and/or relatives and other private trips.

Please Note:

"World Travel Monitor[®]" data is for use exclusively within the client's company / organization. A different utilization or providing this data to people, organizations or to the media without the prior written permission of IPK International is not allowed.

1. East Asian Outbound Market Volume

1.1. Total Market Volume of East Asian MICE Outbound Travel

During 2008, East Asians (China, Korea, Japan, Taiwan, Singapore, Malaysia and Thailand) made a total of 65.5 million outbound trips of at least one overnight stay abroad.

The number of outbound business trips of at least one overnight stay abroad amounted to a total of 15.5 million (24% market share of all outbound trips) in 2008.

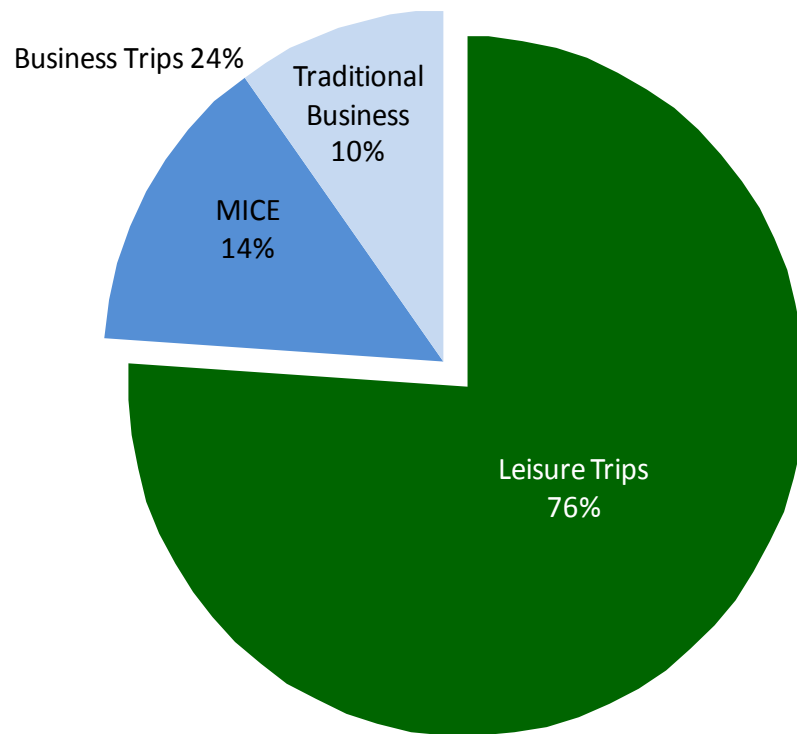
Of these outbound business trips, 8.9 million were MICE trips (Meeting/Incentive/Convention/Exhibition) and 6.6 million were so called traditional business trips (customer calls, visit of branch office, etc.).

Thus, the MICE segment comprises 14% and the traditional business segment 10% of all outbound trips taken by East Asians.

East Asian Outbound Travel	In million	In %
Total East Asian Outbound Trips	65.5	100%
Total East Asian Outbound Business Trips	15.5	24%
- MICE (Meeting/Incentive/Convention/Exhibition) Trips	8.9	14%
- Traditional Business Trips	6.6	10%

Source: World Travel Monitor® – 2008; IPK International, Munich

**East Asian Outbound Travel
Market Share of Business / MICE Trips**



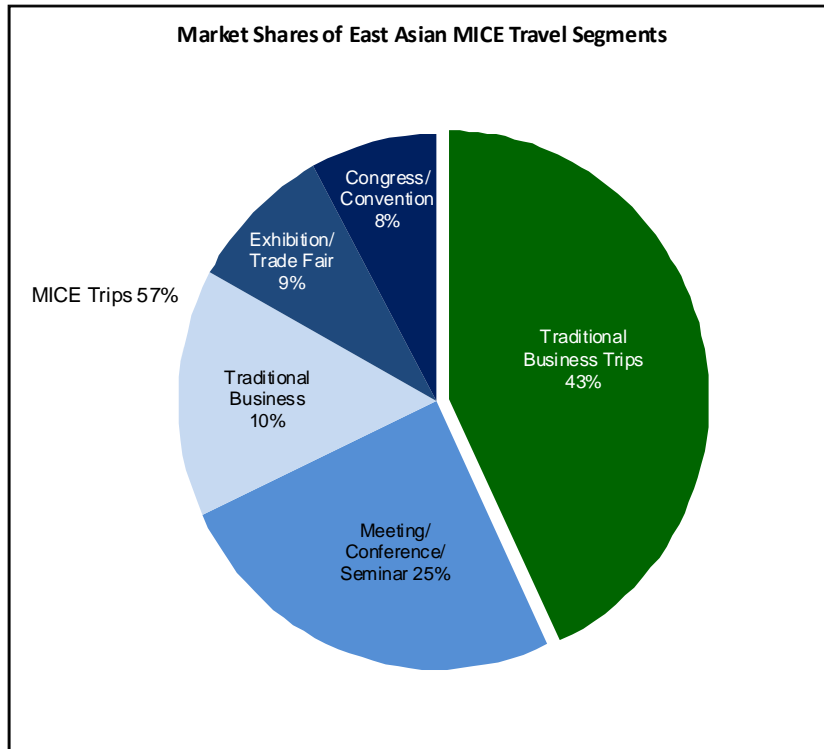
Source: World Travel Monitor® – 2008; IPK International, Munich

1.2. Volume of the Different MICE Segments

MICE Segments	In million	In %
Total East Asian Outbound Business Trips	15.5	100%
- MICE Trips	8.9	57%
-- Conference/Meeting/Seminar	4.0	25%
-- Incentive	2.0	13%
-- Exhibition/Trade Fair	1.5	10%
-- Congress/Convention	1.4	9%
- Traditional Business Trips	6.6	43%

Source: World Travel Monitor® – 2008; IPK International, Munich

- Exhibiting a volume of 8.9 million trips (57% market share) the so called MICE (Meeting/Incentive/Convention/Exhibition) trips were the largest segment among East Asian outbound business trips. Thereof,
 - The majority of trips, 4.0 million (25%) were conference/meeting/seminar trips.
 - Followed by the incentive trips with 2.0 million (13%).
 - 1.5 million (10%) were made for the purpose of visiting an exhibition / trade fair.
 - And congress/convention trips were the smallest segment with 1.4 million trips (9%).
- 6.6 million (43%) of the East Asian outbound business trips were so-called traditional business trips.



Source: World Travel Monitor® – 2008; IPK International, Munich

2. East Asian MICE Outbound Source Markets

2.1. Outbound MICE Trips per Source Market

East Asian Source Markets	Total Outbound Trips (in million)	Total Outbound MICE	
		In million	in %
Japan	18.1	1.4	8%
Korea	11.5	1.5	13%
China	14.0	2.6	18%
Taiwan	9.3	1.7	19%
Singapore	5.7	0.4	8%
Malaysia	4.1	0.5	13%
Thailand	2.9	0.6	21%

Source: World Travel Monitor® – 2008; IPK International, Munich

- The average MICE trip share was 14%. Countries with an above average MICE trip share were Thailand, Taiwan and China.
- Below average MICE trip shares could be found for Korea, Malaysia, Japan and Singapore
- The highest share of MICE trips, applied to the total outbound trips, had Thailand with 21%, followed by Taiwan (19%) and China (18%)

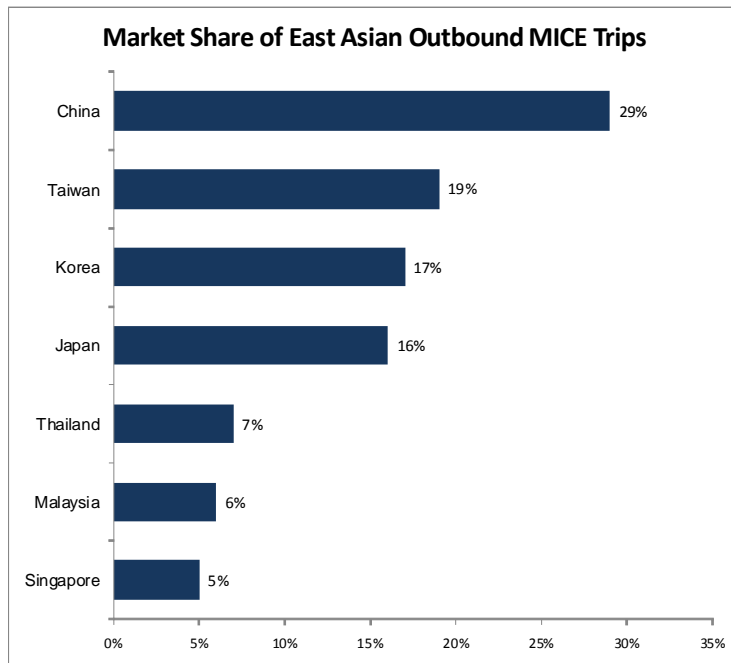
- Korea (13%) and Malaysia (13%) then follow the ranking
- With a share of fewer than 10% Singapore and Japan had the lowest number of MICE trips compared with their total outbound trips

2.2. Market Share of Outbound MICE Trips

The most important East Asian source markets for outbound MICE trips were:

East Asian Source Markets	Total Outbound MICE	
	In million	In %
Total East Asian Outbound MICE Trips	8.9	100%
China	2.6	29%
Taiwan	1.7	19%
Korea	1.5	17%
Japan	1.4	16%
Thailand	0.6	7%
Malaysia	0.5	6%
Singapore	0.4	5%

Source: World Travel Monitor® – 2008; IPK International, Munich
Deviations from 100% due to rounding



- **China** is the leading market for MICE trips in East Asia, with 2.6 million MICE trips corresponding to a market share of 29% of the overall East Asian outbound MICE market.
- Taiwan ranks second with 1.7 million outbound MICE trips, corresponding to a 19% market share.
- All together this two source markets alone account for about 50% of all East Asian outbound MICE trips.
- Korea (1.5 million trips) and Japan (1.4 million trips) also still count among the markets with a relatively high outbound MICE travel volume in East Asia.
- Thailand, Malaysia and Singapore, all with an amount of less than 1 million MICE trips, then follow in the ranking.

2.3. Top East Asian Source Markets by Different MICE Segments

Different MICE Segments	Top Source Markets		
	1.	2.	3.
Conference/Meeting/Seminar	China 1.32 million	Korea 0.99 million	Japan 0.88 million
Congress/Convention	China 0.27 million	Japan 0.25 million	Taiwan 0.25 million
Exhibition / Trade Fair	China 0.24 million	Korea 0.17 million	Japan 0.14 million
Incentive Trips	China 0.73 million	Taiwan 0.59 million	Japan 0.37 million

Source: World Travel Monitor® – 2008; IPK International, Munich

- For all MICE segments the most important source markets are China, Japan, Korea and Taiwan.
- China is the key source market for conference/meeting/seminar trips, congress/convention trips and for the trips which were made for the purpose of visiting an exhibition / trade fair.
- China is also the top source market for incentive trips closely followed by Taiwan. Incentive trips seem to be a popular attraction and motivation for employees in the Chinese business culture.

3. MICE Destination Countries

3.1. Number of Outbound MICE Trips per Destination Country

With a look on the different destination areas for MICE trips, the following allocation can be found:

Destination Areas	In million	In %
Asia / Pacific	6.2	70%
Europe	1.8	20%
America	0.8	9%
Africa	0.1	1%

Source: World Travel Monitor[®] – 2008; IPK International, Munich
 Deviations from 100% due to rounding

The most important outbound destinations for MICE trips of the East Asians were:

Destination Countries	MICE trips to...	
	In million	In %
China	2.47	28%
Japan	0.74	8%
USA	0.71	8%
Thailand	0.51	6%
Korea	0.40	4%
Germany	0.39	4%
Hong Kong, Macao	0.33	4%
Singapore	0.33	4%
Malaysia	0.30	3%
Russia	0.25	3%
Middle East Asia	0.24	3%

Vietnam	0.22	2%
Italy	0.21	2%
France	0.19	2%
Others	1.58	18%
Total	8.9	100%

Source: World Travel Monitor[®] – 2008; IPK International, Munich
Deviations from 100% due to rounding

- China is not only the leading source market for outbound MICE trips in East Asia but also the leading destination: about 2.5 million East Asian MICE trips, corresponding to a 28% market share of the overall East Asian MICE trips were made to China in 2008.
- Japan (0.74 million trips), USA (0.71 million trips) and Thailand (0.51 million trips) then follow the ranking.
- All together these four destinations alone attract 50% of all East Asian MICE trips made in 2008.

3.2. Top Destination Countries by Different MICE Segments

Different MICE Segments	Top Destination Countries		
	1.	2.	3.
Conference/ Meeting/Seminar	China 1.4 million	USA 0.42 million	Japan 0.34 million
Congress/ Convention	USA 0.13 million	China 0.13 million	Hong Kong, Macao 0.06 million
Exhibition / Trade Fair	China 0.27 million	Japan 0.15 million	Germany 0.14 million
Incentive Trips	China 0.67million	Japan 0.23 million	Thailand 0.21 million

Source: World Travel Monitor[®] – 2008; IPK International, Munich

- For all MICE segments the most important outbound destinations were China, USA, Japan, Hong Kong, Thailand and Germany.
- As for all MICE trips, China is also the leading outbound destination for conference/meeting/seminar trips, for the trips which were made for the purpose of visiting an exhibition / trade fair and for the incentive trips.
- USA is the top destination for congress/convention trips closely followed by China.

4. East Asian MICE Outbound Travel Characteristics

4.1. Mode of Transportation

For their outbound MICE trips the East Asians used the following main means of transportation:

Means of Transportation	East Asian Outbound MICE Trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trips
Plane	78%	84%	87%	71%	62%
Car	13%	13%	5%	24%	13%
Coach / Bus	5%	3%	4%	2%	12%
Train	3%	1%	2%	2%	6%
Others	2%	*	2%	2%	7%

Source: World Travel Monitor[®] - 2008, IPK International, Munich
Deviations from 100% due to rounding

- The majority (78%) of all East Asian outbound MICE trips in 2008 were made by plane. Another 13% of the trips were made by car.
- In comparison thereto, all other means of transportation (train as well as bus, etc.) only have a minor significance regarding the East Asian outbound MICE trips
- With a look at the different MICE segments, with a share of more than 60%, the plane is also the most important mode of transportation, followed by the car
- With a market share of 12%, coach/bus played a major role in the segment of incentive trips

4.2. Preferred Accommodation/Category

On their outbound MICE trips the East Asians stayed at the following types of accommodation:

Accommodation Used	East Asian Outbound MICE trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Hotel	85%	87%	86%	80%	83%
- First Class (4/5 stars)	46%	49%	44%	34%	46%
- Mid-Grade (3 stars)	31%	29%	41%	38%	27%
- Budget (1/2 stars)	8%	9%	2%	8%	9%
Other Paid Accommodation	10%	7%	9%	16%	12%
Private Accommodation (unpaid)	4%	5%	5%	2%	1%
Other	2%	1%	*	1%	4%

Source: World Travel Monitor® - 2008, IPK International, Munich

- On 85% of their outbound MICE trips, the East Asians stayed overnight at hotels, primarily at 4/5-star hotels (46%) but also at 3-star hotels (31%).
- All other accommodation types are of less importance for the East Asians on their outbound MICE trips.
- With respect to the different MICE segments the following accommodation preferences can be found:
 - Hotel accommodations clearly prevailed for all segments, with a share of more than 80%

- Regarding the hotel category: First-class hotels (4/5-stars) were more frequently used than 3-star hotels, excepting the exhibition / trade fair trips
- Budget hotels were generally rarely frequented.
- There was a somewhat higher share of other paid accommodation use for exhibition / trade fair trips and incentive trips than for conference/meeting/seminar and congress/convention trips

4.3. Booking Behavior

4.3.1. Booking Sites

The East Asians booked their outbound MICE trips as follows:

Booking Sites	East Asian Outbound MICE Trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Booking at a travel agency	48%	41%	38%	51%	62%
Booking via internet	23%	23%	26%	30%	19%
Via an Implant (corporate travel department)	15%	18%	8%	5%	17%
Direct booking with a hotel / accommodation	11%	13%	11%	15%	6%
Direct booking with a transport carrier	9%	9%	9%	10%	7%
Other booking sites (club, newspaper, church, etc.)	5%	4%	6%	3%	6%
<i>Total pre-booking</i>	<i>90%</i>	<i>90%</i>	<i>96%</i>	<i>88%</i>	<i>90%</i>
<i>Non pre-booking</i>	<i>10%</i>	<i>10%</i>	<i>4%</i>	<i>12%</i>	<i>10%</i>

Source: World Travel Monitor® - 2008, IPK International, Munich
Multiple answers possible

- In 2008, the East Asians made advance bookings for 90% of their outbound MICE trips, whereby:
 - Bookings at a travel agency were made for 48% of the trips.
 - Bookings via internet were made for 23% of the trips.

- Thus, travel agencies and the internet are the most important booking sites for East Asian MICE travel, with the travel agency already having a higher importance than the internet.
- Regarding the MICE segments following booking preferences can be found:
 - Booking at a travel agency and via internet are also the most important booking sites.
 - The corporate travel department was also made to a quite frequent degree, somewhat more for conference/meeting/seminar trips and incentive trips than congress/convention trips and exhibition/trade fair trips.
 - And direct booking with an accommodation also had some importance as a booking site for the MICE segments.

4.3.2.Booking Products

East Asians with pre-bookings booked the following products / services for their outbound MICE trips in 2008:

Booking Products / Services	East Asian Outbound MICE Trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Flight	85%	85%	87%	83%	85%
Accommodation	77%	75%	75%	75%	85%
Travel insurance	46%	38%	44%	41%	65%
Bus / Coach	30%	25%	28%	22%	45%
Ticket(s) for an event	22%	17%	19%	14%	36%
Rental car	18%	18%	10%	18%	20%
Train	11%	11%	6%	6%	14%
Other	6%	6%	5%	5%	5%

Source: World Travel Monitor[®] - 2008, IPK International, Munich
Multiple answers possible

- In relation to MICE trips the most frequently booked products were flights (85%) and accommodations (77%). Thereby, the following were above all combined:
- Accommodation and flight booked: 70%
- Accommodation and other transport booked: 5%
- Accommodation only booked: 2%
- And flight only booked: 12%.

- As regards the MICE segments, the following shows:
 - Flights and accommodations are most frequently booked products
 - Followed by the travel insurance
 - Remarkable is the high share of bus/coach (45%) and of tickets for an event (36%) regarding the incentive trip segment.
 - Rental cars and train were also booked to a somewhat fewer degree.

4.3.3.Booking Period

Pre-bookings for the outbound MICE trips were made as follows:

Booking Period	East Asian Outbound MICE Trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Up to 1 month in advance	79%	82%	64%	73%	81%
2-3 months in advance	19%	17%	31%	26%	17%
4-6 months in advance	1%	1%	0%	*	1%
7 or more months in advance	*	0%	5%	*	*

Source: World Travel Monitor® - 2008, IPK International, Munich
Deviations from 100% due to rounding

- The East Asians made the following advance bookings for their MICE trips in 2008:
 - Short term (up to 1 month before departure): 79%
 - medium term (2-3 months before departure): 19%
 - long term (4 months and longer before departure): 1%
 - 7 or more months in advance: <0.5%
- Thus, the by far most frequent booking period was “short term”.
- This allocation applies even to the particular MICE segments, whereas 5% of the congress/convention trips were booked 7 or more months in advance.

4.4. Length of Trip

In 2008, the duration of East Asian MICE trips was as follows:

Length of Trip	East Asian Outbound MICE Trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
1-3 nights	26%	26%	30%	21%	27%
4-7 nights	56%	54%	48%	52%	63%
8-11 nights	8%	8%	15%	10%	4%
12-15 nights	7%	6%	4%	14%	4%
16+ nights	4%	6%	3%	4%	1%
Mean length (nights)	6.8	7.4	5.9	7.0	5.7

Source: World Travel Monitor® - 2008, IPK International, Munich
Deviations from 100% due to rounding

- The mean length of all East Asian MICE trips in 2008 was 6.8 nights.
- For all MICE trips as well as all segments, trips between four and seven nights duration were the most frequent, with a market share of about 50%.
- With a share between 20% and 30%, trips due to three nights were the second frequent type of trip.
- As regards the exhibition/trade fair, trips between 12 and 15 nights duration, with a market share of 14% were also an important sector.
- With a mean length of 7.4 conference/meeting/seminar trips had the longest duration in 2008.

4.5. Travel Expenditure

East Asian travel spending on outbound MICE trips was as follows in 2008:

Travel Spending*	East Asian Outbound MICE Trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Mean spending per trip / person (Euro)	1694	1860	1903	1658	1342
Mean spending per night / person (Euro)	249	251	323	237	235

Source: World Travel Monitor® - 2008, IPK International, Munich

*Travel spending includes transportation, accommodation, meals and other incidental costs

- In 2008, the East Asians spent about 1694 Euro per MICE trip on average. This corresponds to an average per-night expenditure of 249 Euro.
- Segments with an above average travel spending are congress/convention trips with a travel spending of 1903 Euro and conference/meeting/seminar trips with a travel spending of 1860 Euro.
- Exhibition/trade fair trips and incentive trips have a somewhat below average travel spending.

4.6. Socio-demographic Characteristics of the Travelers

The following socio-demographic characteristics define the East Asians who went on outbound MICE trips in 2008:

Socio-Demographic Characteristics	East Asian Outbound MICE Trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Gender					
Male	68%	73%	60%	68%	61%
Female	32%	27%	40%	32%	39%
Age					
15-24 years	10%	7%	6%	15%	12%
25-34 years	33%	34%	30%	39%	30%
35-44 years	31%	32%	26%	30%	32%
45-54 years	17%	20%	21%	13%	15%
55-64 years	7%	5%	12%	3%	10%
65+ years	2%	3%	4%	0.5%	*
Mean age (in years)	37.6	38.4	40.5	34.4	37.3
Education					
Lower level	6%	5%	8%	8%	5%
Middle level	26%	25%	28%	19%	35%
Upper level	68%	70%	64%	73%	60%

Source: World Travel Monitor® - 2008, IPK International, Munich
Deviations from 100% due to rounding

Socio-Demographic Characteristics	East Asian Outbound MICE Trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Household Income					
Lower Income	8%	9%	2%	5%	9%
Lower Middle Income	16%	15%	16%	14%	19%
Upper Middle Income	35%	37%	33%	36%	34%
Upper Income	41%	39%	49%	45%	39%
Children in household (under 15 years)					
Yes	47%	48%	43%	50%	44%
No	53%	52%	57%	50%	56%
Size of household					
Single	9%	12%	3%	1%	9%
2 persons	12%	13%	19%	7%	10%
3-4 persons	58%	60%	46%	64%	55%
5+ persons	21%	16%	32%	28%	26%
Working Status					
Working	94%	93%	91%	86%	100%
Non-Working	6%	7%	9%	14%	0%
Area of Residence					
Rural Area	4%	2%	7%	2%	9%
Small Town	17%	18%	22%	18%	14%
Large Town	79%	80%	71%	80%	77%

Source: World Travel Monitor[®] - 2008, IPK International, Munich
 Deviations from 100% due to rounding

The East Asians who went on outbound MICE trips exhibited the following characteristics:

- More men than women
- Above all belonging to the age groups 25-54 and 35-44 year-olds, corresponds to an mean age of about 38 years
- Higher education levels
- Primarily upper but also upper middle income groups
- About 50% with children (under 15 years) living in the household
- Most of them live in a household within 3-4 persons
- Approximately 90% are working people
- And about 80% live in a large town

5. East Asian Inbound Market Volume

5.1. Total Market Volume of East Asian MICE Inbound Travel

The number of international business trips of at least one overnight stay to East and Southeast Asian destinations, amounted to a total of 17.3 million in 2008.

Of these business trips, 9.6 million were traditional business trips and 7.7 million were MICE trips.

Hence, the traditional business segment comprises 55% and the MICE segment 45% of all international business trips taken to East Asia.

International Business Travel to East Asia	In million	In %
Total International Business Trips to East Asia	17.3	100%
- Traditional Business Trips	9.6	55%
- MICE Trips	7.7	45%

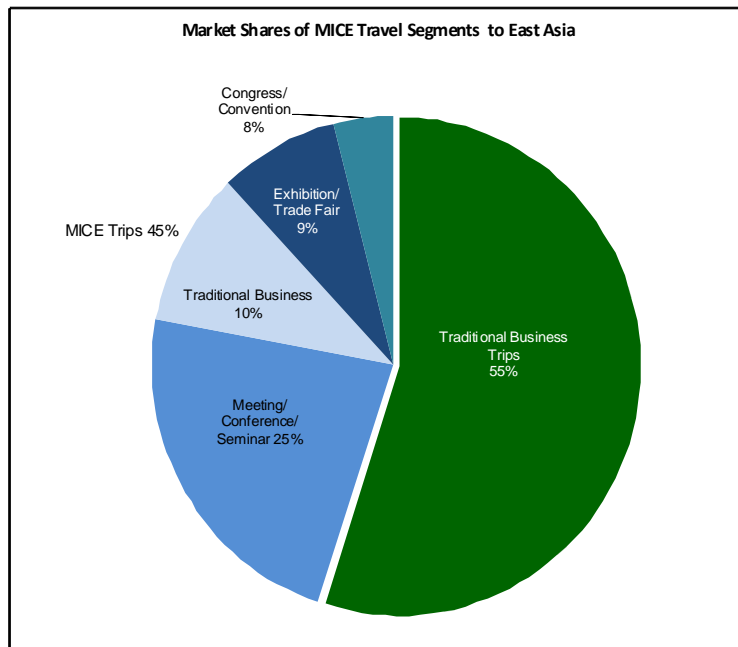
Source: World Travel Monitor[®] – 2008; IPK International, Munich

5.2. Volume of the Different MICE Segments

MICE Segments	In million	In %
Total Inbound Business Trips to East Asia	17.3	100%
- Traditional Business Trips	9.6	55%
- MICE Trips	7.7	45%
-- Conference/Meeting/Seminar	4.0	23%
-- Incentive	1.7	10%
-- Exhibition/Trade Fair	1.3	8%
-- Congress/Convention	0.7	4%

Source: World Travel Monitor® – 2008; IPK International, Munich

- The most important segment of business trips to East Asia are traditional business trips. About 9.6 million (55%) of all business trips were for traditional business purposes, such as customer calls, visit of branch office etc.
- Approximately 7.7 million (45%) of the international business trips to East Asia were MICE trips. Thereof,
 - 4.0 million (23%) were made for the purpose of visiting a conference/meeting/seminar
 - Followed by the incentive trips with 1.7 million (10%)
 - 1.3 million (8%) were made for the purpose of visiting an exhibition / trade fair
 - And congress/convention trips were the smallest segment with 0.7 million trips (4%).



Source: World Travel Monitor[®] – 2008; IPK International, Munich

6. MICE Inbound Source Markets for East Asia

6.1. Number of MICE Trips per Source Market

With a look on the different source regions for MICE trips, the following allocation can be found:

Source Region	In million	In %
Asia / Pacific	6.3	82%
Europe	0.8	10%
America	0.7	9%

Source: World Travel Monitor® – 2008; IPK International, Munich
Deviations from 100% due to rounding

International Source Markets for East Asia	Total OutboundTrips (in million)	Total MICE trips to East Asia	
		In million	in %
Taiwan	9.3	1.4	15%
Korea	11.5	1.2	10%
China	14.0	1.0	7%
Japan	18.1	0.9	5%
India	5.5	0.7	12%
Thailand	2.9	0.5	16%
USA	63.8	0.5	1%
Malaysia	4.1	0.4	9%
Singapore	5.7	0.3	6%
Russia	20.7	0.3	1%

Source: World Travel Monitor® – 2008; IPK International, Munich

- Thailand has the highest share (16%) of MICE trips to East Asia applied to its total trips, followed by Taiwan (15%), India (12%) and Korea (10%).
- By contrast, Russia and USA have, with 1%, a very low share of MICE trips to East Asia.

6.2. Market Share of Inbound MICE Trips to East Asia

Most important source markets for all MICE trips to East Asia are:

Source Markets for East Asia	Total inbound MICE	
	In million	In %
Total Inbound MICE Trips to East Asia	7.7	100%
Taiwan	1.4	18%
Korea	1.2	16%
China	1.0	13%
Japan	0.9	11%
India	0.7	9%
USA	0.5	7%
Thailand	0.5	6%
Malaysia	0.4	5%
Singapore	0.3	4%
Russia	0.3	4%
Other international markets	0.5	6%

Source: World Travel Monitor® – 2008; IPK International, Munich



- Taiwan ranked as leading source market for MICE trips to East Asia, comprising 18% of all MICE trips to East Asia.
- Korea (16%), China (13%) and Japan (11%) follow.
- Together these four source markets account for about two third of all MICE trips taken to East Asia.

6.3. Top international Source Markets by Different MICE Segments

Different MICE Segments	Top Source Markets		
	1.	2.	3.
Conference/Meeting/Seminar	Korea 0.85 million	Taiwan 0.5 million	China 0.48 million
Congress/Convention	USA 0.2 million	Taiwan 0.11 million	Japan 0.06 million
Exhibition / Trade Fair	India 0.19 million	Taiwan 0.15 million	China 0.13 million
Incentive Trips	Taiwan 0.63 million	China 0.37 million	Japan 0.3 million

Source: World Travel Monitor® – 2008; IPK International, Munich

- For all MICE segments the most important international source markets are Taiwan, China and Japan.
- Followed by Korea, USA and India.

7. MICE Destination Countries

7.1. Number of Inbound MICE Trips per Destination Country

The most important destinations for MICE trips to East Asia are:

Destination Countries	MICE trips to...	
	In million	In %
China	3.1	40%
Japan	0.89	12%
Thailand	0.66	9%
Hong Kong, Macao	0.65	9%
Singapore	0.54	7%
Korea	0.46	6%
Malaysia	0.44	6%
Vietnam	0.25	3%
Other South East Asian Countries: Brunei, Burma, Cambodia, Lao	0.2	3%
Indonesia	0.17	2%
Taiwan	0.13	2%
Philippines	0.09	1%
Total	7.7	100%

Source: World Travel Monitor® – 2008; IPK International, Munich
Multiple answers possible

- China is the leading destination for inbound MICE trips to East Asia. 3.1 million inbound MICE trips, corresponding to a 40% market share of the international MICE trips to East Asia were made to China in 2008.
- Japan (0.89 million trips), Thailand (0.66 million trips) and Hong Kong / Macao (0.65 million trips) then follow the ranking.

- All together, China and Japan alone attract 50% of all international MICE trips to East Asia made in 2008.

7.2. Top Destination Countries by Different MICE Segments

Different MICE Segments	Top Destination Countries		
	1.	2.	3.
Conference/ Meeting/Seminar	China 1.8 million	Japan 0.41 million	Singapore 0.33 million
Congress/ Convention	China 0.16 million	Hong Kong, Macao 0.14 million	Japan 0.08 million
Exhibition / Trade Fair	China 0.51 million	Hong Kong, Macao 0.18 million	Japan 0.18 million
Incentive Trips	China 0.67 million	Japan 0.23 million	Thailand 0.21 million

Source: World Travel Monitor® – 2008; IPK International, Munich

- For all MICE segments the most important destinations are China, Japan, USA, Hong Kong, Thailand and Singapore.
- China is the most important destination for all MICE segments regarding the international MICE trips to East Asia

8. International MICE Inbound Travel Characteristics

8.1. Mode of Transportation

For the inbound MICE trips to East Asia the following main means of transportation were used:

Means of Transportation	Inbound MICE Trips to east Asia				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trips
Plane	73%	74%	87%	76%	59%
Car	16%	16%	8%	20%	18%
Coach / Bus	6%	7%	3%	1%	13%
Train	1%	1%	1%	1%	1%
Others	4%	2%	2%	3%	9%

Source: World Travel Monitor® - 2008, IPK International, Munich
 Deviations from 100% due to rounding

- The majority (73%) of all international MICE trips to East Asia in 2008 were made by plane. Another 16% of the trips were made by car.
- In comparison thereto, all other means of transportation (train as well as bus, etc.) only have a minor significance regarding the international MICE trips to East Asia.
- With a look at the different MICE segments, with a market share of more than 50%, the plane is also the most important mode of transportation, followed by the car

- With a market share of 13%, coach/bus has a considerable market share in the segment of incentive trips

8.2. Preferred Accommodation/Category

On the MICE trips to East Asia the following types of accommodation were preferred:

Accommodation Used	Inbound MICE trips to East Asia				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Hotel	84%	84%	91%	84%	81%
- First Class (4/5 stars)	54%	54%	62%	54%	50%
- Mid-Grade (3 stars)	25%	24%	28%	29%	22%
- Budget (1/2 stars)	6%	6%	1%	2%	9%
Other Paid Accommodation	10%	8%	9%	10%	13%
Private Accommodation (unpaid)	4%	6%	*	5%	2%
Other	3%	2%	*	1%	5%

Source: World Travel Monitor® - 2008, IPK International, Munich

- On 84% of the inbound MICE trips to East Asia, the guests stayed overnight at hotels, primarily at 4/5-star hotels (54%) but also at 3-star hotels (25%).
- All other accommodation types are of less importance for the inbound MICE trips to East Asia.

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- With respect to the different MICE segments the following accommodation preferences can be found:
 - Hotel accommodations clearly prevailed for all segments, with a market share of more than 80%
 - Regarding the hotel category: First-class hotels (4/5-stars) (about 50% market share) were more frequently used than 3-star hotels (about 30% market share),
 - Budget hotels (less than 10% market share) were generally rarely frequented.
 - There was a somewhat higher share of other paid accommodation use for exhibition / trade fair trips and incentive trips than for conference/meeting/seminar and congress/convention trips

8.3. Booking Behavior

8.3.1. Booking Sites

The international inbound MICE trips to East Asia were booked as follows:

Booking Sites	Inbound MICE Trips to East Asia				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Booking at a travel agency	49%	45%	44%	44%	65%
Booking via internet	24%	21%	34%	36%	19%
Direct booking with a hotel / accommodation	13%	13%	16%	21%	5%
Via an Implant (corporate travel department)	12%	13%	2%	2%	18%
Direct booking with a transport carrier	7%	7%	14%	12%	3%
Other booking sites (club, newspaper, church, etc.)	4%	6%	5%	5%	6%
<i>Total pre-booking</i>	<i>86%</i>	<i>84%</i>	<i>96%</i>	<i>88%</i>	<i>87%</i>
<i>Non pre-booking</i>	<i>14%</i>	<i>16%</i>	<i>4%</i>	<i>12%</i>	<i>13%</i>

Source: World Travel Monitor® - 2008, IPK International, Munich
Multiple answers possible

- In 2008, the inbound MICE trips to East Asia were advance bookings for 90%, whereby:
- Bookings at a travel agency were made for 49% of the trips.
- Bookings via internet were made for 24% of the trips.

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- Thus, travel agencies and the internet are the most important booking sites for MICE travel to East Asia, with the travel agency already having a higher importance than the internet.
 - Regarding the MICE segments following booking preferences can be found:
 - Booking at a travel agency and via internet are also the most important booking sites.
 - Direct booking with an accommodation was also made to a quite frequent degree, in exception the incentive trips (5% market share)
 - Regarding the conference/meeting/seminar trips and the incentive trips booking via an implant also had some importance.

8.3.2.Booking Products

Regarding the pre-bookings the following products / services for the inbound MICE trips to East Asia were booked in 2008:

Booking Products / Services	Inbound MICE Trips to East Asia				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Flight	84%	77%	90%	89%	92%
Accommodation	81%	75%	92%	79%	92%
Travel insurance	44%	37%	43%	28%	72%
Bus / Coach	25%	21%	28%	9%	45%
Ticket(s) for an event	20%	13%	19%	11%	40%
Rental car	17%	16%	9%	16%	22%
Train	7%	9%	7%	4%	6%
Other	6%	6%	5%	5%	5%

Source: World Travel Monitor® - 2008, IPK International, Munich
Multiple answers possible

- In relation to inbound MICE trips to East Asia the most frequently booked products were flights (84%) and accommodations (81%). Thereby, the following were above all combined:
 - Accommodation and flight booked: 74%
 - accommodation and other transport booked: 3%
 - accommodation only booked: 4%
 - And flight only booked: 8%.

- As regards the MICE segments, the following shows:
 - Flights and accommodations are most frequently booked products
 - Followed by the travel insurance (especially regarding the incentive trips)
 - Remarkable is the high share of bus/coach (45%) and of tickets for an event (40%) in the incentive trip segment.
 - Rental cars and train were also booked to a somewhat fewer degree.

8.3.3.Booking Period

Pre-bookings for the inbound MICE trips to East Asia were made as follows:

Booking Period	Inbound MICE Trips to East Asia				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Up to 1 month in advance	80%	85%	51%	75%	82%
2-3 months in advance	12%	12%	13%	9%	15%
4-6 months in advance	2%	1%	4%	8%	2%
7 or more months in advance	0.8%	*	3%	2%	*

Source: World Travel Monitor® - 2008, IPK International, Munich
Deviations from 100% due to rounding

- The following advance bookings for the inbound MICE trips to East Asia in 2008 were made:
 - Short term (up to 1 month before departure): 80%
 - medium term (2-3 months before departure): 12%
 - long term (4 months and longer before departure): 2%
 - seven or more months in advance: 0.8%
- Thus, the by far most frequent booking period was “short term”.
- This allocation applies even to the particular MICE segments, whereas 3% of the congress/convention trips and 2% of the exhibition/trade fair trips were booked seven or more months in advance.

8.4. Length of Trip

In 2008, the duration of the inbound MICE trips to East Asia was as follows:

Length of Trip	Inbound MICE Trips to East Asia				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
1-3 nights	32%	33%	26%	31%	33%
4-7 nights	52%	51%	34%	48%	62%
8-11 nights	7%	6%	23%	8%	3%
12-15 nights	5%	4%	11%	7%	1%
16+ nights	4%	5%	6%	5%	1%
Mean length (nights)	6.4	6.8	8.1	6.3	5.2

Source: World Travel Monitor® - 2008, IPK International, Munich
Deviations from 100% due to rounding

- The mean length of all inbound MICE trips to East Asia in 2008 was 6.4 nights.
- The duration of the congress/convention trips, with a mean length of 8.1 nights, is somewhat longer than the duration of all MICE trips to East Asia
- For all MICE trips as well as all segments, trips between four and seven nights duration were the most frequent.
- With a share between 25% and 35%, trips due to three nights were the second frequent type of trip.
- As regards the congress/convention segment, trips between eight and eleven nights and between 12 and 15 nights duration, with a market share of 23% and 11% were also an important segment.

8.5. Travel Expenditure

The travel spending on inbound MICE trips to East Asia was as follows in 2008:

Travel Spending*	Inbound MICE Trips to East Asia				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Mean spending per trip / person (Euro)	1165	1122	1658	1331	1005
Mean spending per night / person (Euro)	182	165	205	211	193

Source: World Travel Monitor® - 2008, IPK International, Munich

*Travel spending includes transportation, accommodation, meals and other incidental costs

- In 2008, the guests spent about 1165 Euro per MICE trip to East Asia on average. This corresponds to an average per-night expenditure of 182 Euro.
- Segments with an above average travel spending are congress/convention trips with a travel spending of 1658 Euro and exhibition/trade fair trips with a travel spending of 1331 Euro.
- Conference/meeting/seminar trips and incentive trips have a somewhat below average travel spending.

8.6. Socio-demographic Characteristics of the Travelers

The following socio-demographic characteristics define the people who went on MICE trips to East Asia in 2008:

Socio-Demographic Characteristics	Inbound MICE Trips to East Asia				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Gender					
Male	70%	69%	72%	74%	67%
Female	30%	31%	28%	26%	33%
Age					
15-24 years	8%	6%	4%	7%	12%
25-34 years	29%	29%	17%	35%	29%
35-44 years	34%	32%	32%	32%	38%
45-54 years	19%	23%	19%	13%	14%
55-64 years	7%	6%	13%	10%	6%
65+ years	4%	4%	16%	3%	1%
Mean age (in years)	39.4	40.3	45.4	38.1	36.7
Education					
Lower level	5%	5%	6%	4%	4%
Middle level	25%	21%	18%	25%	32%
Upper level	70%	74%	76%	71%	64%

Source: World Travel Monitor[®] - 2008, IPK International, Munich
Deviations from 100% due to rounding

Socio-Demographic Characteristics	East Asian MICE Trips				
	MICE	Conference/ Meeting/ Seminar	Congress/ Convention	Exhibition/ Trade Fair	Incentive Trip
Household Income					
Lower Income	9%	11%	1%	6%	11%
Lower Middle Income	18%	15%	18%	14%	24%
Upper Middle Income	34%	37%	24%	33%	33%
Upper Income	39%	37%	57%	47%	32%
Children in household (under 15 years)					
Yes	50%	51%	42%	56%	45%
No	50%	49%	58%	44%	55%
Size of household					
Single	9%	8%	6%	10%	9%
2 persons	15%	18%	23%	14%	8%
3-4 persons	54%	57%	41%	51%	54%
5+ persons	22%	17%	30%	25%	29%
Area of Residence					
Rural Area	4%	1%	9%	3%	9%
Small Town	17%	16%	23%	17%	16%
Large Town	79%	82%	67%	81%	76%

Source: World Travel Monitor® - 2008, IPK International, Munich
 Deviations from 100% due to rounding

The persons who went on MICE trips to East Asia exhibited the following characteristics:

- Clearly more men than women
- Above all belonging to the age groups 25-54 and 35-44 year-olds, corresponds to an mean age of about 39 years
- Higher education levels
- Primarily upper but also upper middle income groups
- About 50% with children (under 15 years) living in the household
- Most of them live in a household within 3-4 persons
- And about 80% live in a large town