



ANNUAL SURVEY ON MICE ASSOCIATIONS

INTERNATIONAL MICE ASSOCIATIONS AND THE CORONACRISIS

KONGRES
NEW EUROPE MEETINGS INDUSTRY MAGAZINE

TOLERANCA

POWERED BY TOLERANCA MARKETING RESEARCH DEPARTMENT

Survey dates: **20 May – 18 June 2021**

International MICE associations form the foundation and heart of the meetings industry. They stand by our side in good and bad. With the survey, we wanted to research the role that professional associations took on in the process of overcoming the epidemic, as well as their agility and responsiveness to change. In our opinion, without professional associations, it will be difficult to come out of the crisis stronger and better.

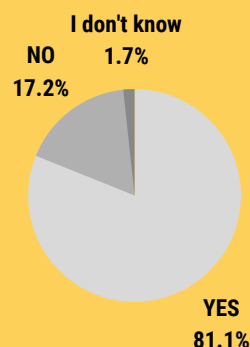
The survey consisted of 28 questions and took respondents an average of 23.6 minutes to complete. We would like to thank all respondents for submitting their answers.

NUMBER OF RESPONDENTS: 258

FROM THE FOLLOWING SECTORS:

- 22,56 % - Convention Bureau/DMO
- 19,51 % - Event Management Agency
- 15,85 % - Incentive Travel House
- 8,45 % - PCO - Professional Conference Organiser
- 6,71 % - Corporate
- 6,10 % - Association
- 6,10 % - Hotel
- 4,88 % - Other
- 3,66 % - Venue Finding Agency
- 2,44 % - Convention Centre
- 1,83 % - Marketing
- 1,22 % - Aviation
- 0,61 % - Technology

Are you a member of any meetings industry associations?



Compared to previous years, the number of respondents who are members of international associations has decreased. In 2020, 95.3% of respondents were members of associations, compared to 81.0% this year.

1. When you think of the meetings and events industry associations, what is the first that comes to mind?

TOP 20 IDEAS

POSITIVE

- Co-operation
- People (meeting new people, making new connections)
- Education
- Networking opportunities
- Community, sharing know-how, cooperation
- Coming back to normality. Meet people and friends in real events
- Belonging, professionalism and advocacy
- B2B meetings
- Associations are foundations to our all industry and healthy economy
- The power of associations is very powerful
- Leaving Legacy
- Support
- Federating the common needs and expectations of the sector

CHALLENGES

- Lack of power in crisis times
- I wish they could do better lobbying... weak point of MICE associations.
- Big Data is watching you around the globe! New technologies in seconds!
- A good network but not very agile.

WRAP-UP

An association is a club of professionals who are working in the MICE industry and are sharing the same interests, exchanging knowledge and experience and support each other. Meetings and events industry associations are a firm support to the progress of the human being, our relationships, the network, the exchange of knowledge, training, updates etc.

Together everyone achieves more!

2. If you are not a member of any associations, why not?

43.8 % - The subscription is too expensive

37.5 % - The Association does not fully represent my professional domain

31.3 % - The Association is not sufficiently relevant to my professional concerns and interests

31.3 % - Other

12.5 % - The Association is not effective in supporting meeting industry

12.5 % - The Association is not effective in responding to my professional concerns or issues

12.5 % - The Association is dominated by a self-perpetuating clique

12.5 % - I never qualified for a membership

Other:

- The current situation does not let us be a member of any associations.
- There are too many to choose from, with too little to distinguish them from each other.
- Did not find the right association for our CEE region

3. Which associations are you part of?

- 18,34 % - MPI - Meeting Professionals International**
- 17,90 % - SITE - The Society for Incentive Travel Excellence**
- 15,28 % - ICCA - The International Congress and Convention Association**
- 7,86 % - Other**
- 4,80 % ADMEI - Association of Destination Management Executives International Association Forum**
- 4,37 % ECM - European Cities Marketing**
- 4,37 % FICP - Financial & Insurance Conference Professionals**
- 3,49 % IAPCO - The International Association of Professional Congress Organisers**
- 3,06 % PCMA - Professional Convention Management Association**
- 2,18 % UNICEO - United Networks of International Corporate Event Organizers**
- 1,77 % MICE Club**
- 1,75 % ASAE - The American Society of Association Executives**
- 1,75 % UFI - The Global Association of the Exhibition Industry**
- 1,75 % UIA - The Union of International Associations**
- 1,31 % IATA - The International Air Transport Association**
- 1,31 % TAAI - Travel Agents Association of India**
- 0,87 % ABTA - The Association of British Travel Agents**
- 0,87 % DMAI - Destinations International**
- 0,87 % EVCOM - Event & Visual Communication Association**
- 0,87 % EVVC - The European Association of Event Centres**
- 0,87 % HBAA - Hotel Booking Agents Association**
- 0,87 % PATA - Pacific Asia Travel Association**
- 0,44 % AIPC - The International Association of Convention Centres**
- 0,44 % ALAGEV – Associação Latino Americana de Gestores de Eventos e Viagens Corporativas**
- 0,44 % DEGEFEST - Deutsche Gesellschaft zur Förderung und Entwicklung des Seminar und Tagungswesens**
- 0,44 % FAMAB - Integrated Brand Experiences**
- 0,44 % EEIA - The European Exhibition Industry Alliance**
- 0,44 % IACC - International Association of Conference Centers**
- 0,44 % Korea MICE Association**
- 0,44 % MICE Germany**

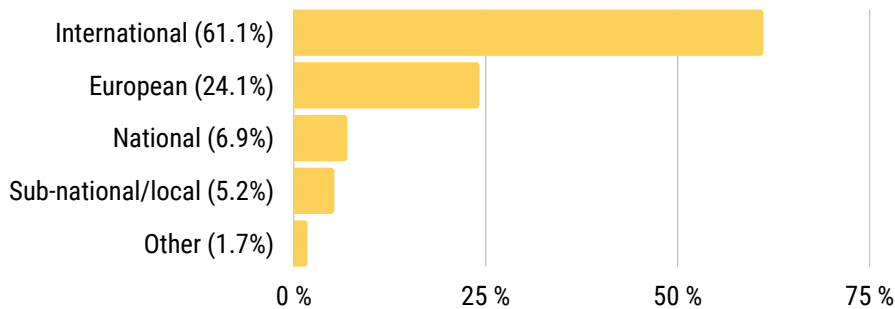
The study confirms the familiar pattern of research from previous years. Most of the respondents are members of international associations with individual membership. The pattern is the same over the years and does not change much. However, each year respondents add new associations to our list.

4. How long have you been a member?

- 63,8 % - Over 5 years**
- 15,5 % - 3-5 years**
- 12,1 % - 1-2 years**
- 8,6 % - Less than 6 months**
- 0,0 % - 6 months to a year**

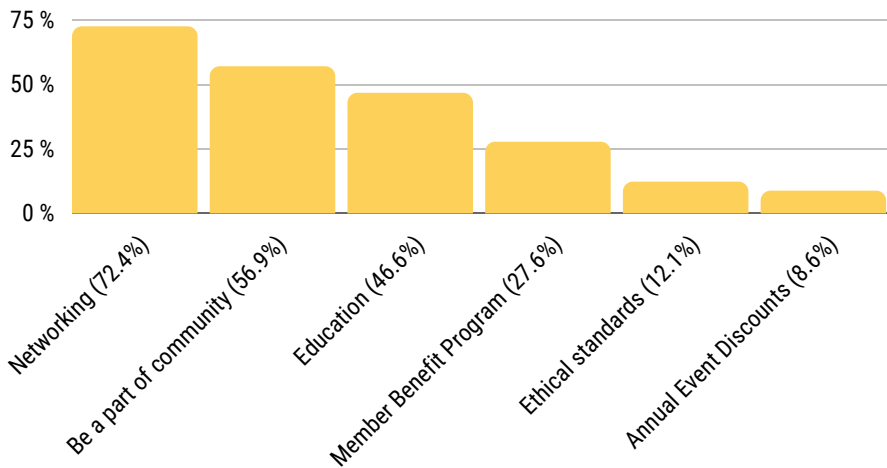
Respondents are loyal members of the associations, with 63.8% having been members for more than five years. The proportion of new fresh members is low, which in practice may mean that associations still have a lot of room to grow in terms of recruiting new members.

5. Please specify the geographic coverage of your association:



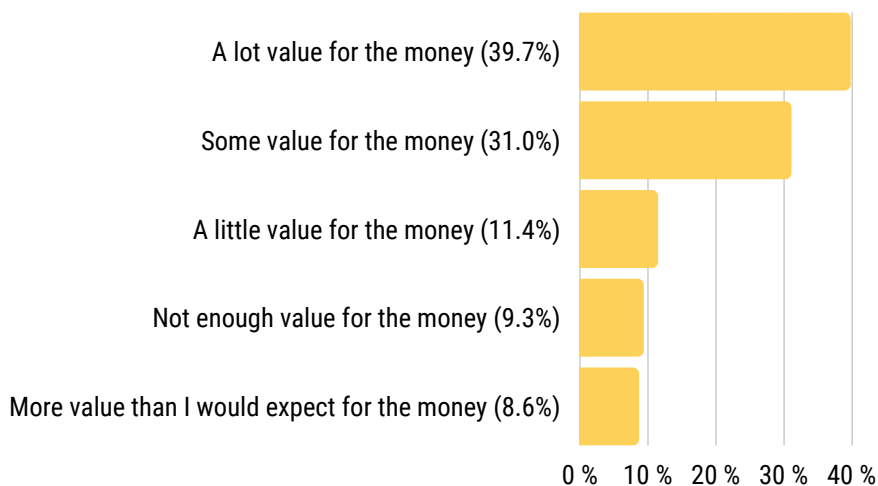
The majority of respondents (85.2%) are members of global organisations or are members of major European associations.

6. What was your primary reason for joining the association?



Particularly interesting are the answers to the question what is the main reason for joining the association. These data tell us a lot about the areas to which associations should pay particular attention.

7. How does the annual Association membership cost compare with the value that you derive from the membership?



The value for money of membership fees in international associations is rated good. 48.3% (a lot of value and more value) rated the value positively. There is also a high proportion of neutral (31.0%). However, associations still have a lot of room for improvement in the area of communicating their added value.

8. How likely would you recommend an association membership to a colleague?

- 53.4 % - Very likely
- 27.6 % - Moderately likely
- 19.0 % - Slightly likely
- 0.0 % - Very unlikely

The level of trust in the associations of which the respondents are members is high. As many as 81% of respondents would more or less recommend the association to their colleagues.

9. Did you change your membership in the association during the epidemic?

- 89.7 % - We stayed loyal members
- 8.6 % - We temporarily cancelled our membership due to the crisis
- 1.7 % - We permanently cancelled our membership due to the crisis

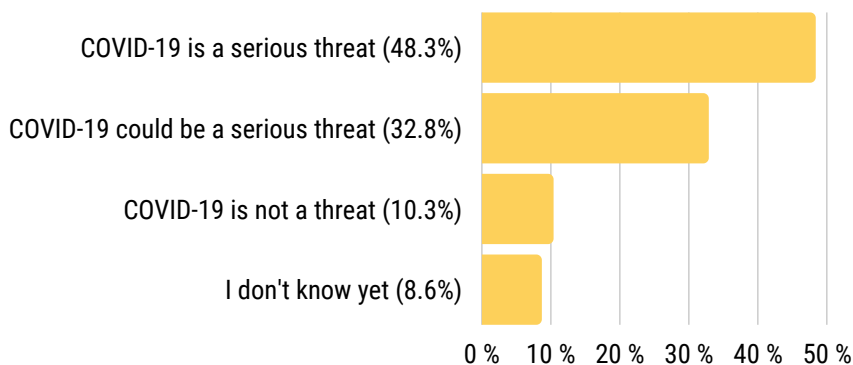
Respondents remained loyal to the associations even in times of crisis. Only a minority of 10.3% of respondents had to temporarily freeze their membership. The level of loyalty to associations is extremely high regardless of the crisis.

10. How satisfied are you with the work of the association that you are a member of during Covid-19 crisis?

- 31.0 % - Totally Satisfied
- 25.9 % - Neutral
- 19.0 % - Somewhat Satisfied
- 17.2 % - Somewhat Dissatisfied
- 6.9 % - Very Dissatisfied

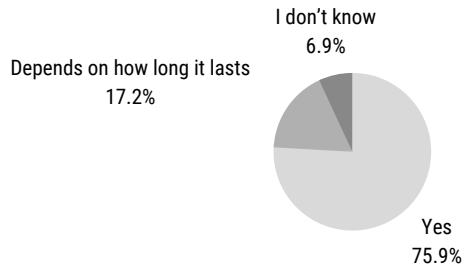
Half of the respondents are satisfied with the work that associations are doing during the coronacrisis. However, it is worrying that a relatively high proportion is neutral and that 24.1% of respondents are dissatisfied with the work of the associations. The crisis has raised members' expectations and it is clear that associations will have to find the right answers to the new challenges of members.

11. What kind of threat does the COVID-19 crisis represent for MICE associations?



Most respondents see the current situation as a glass half empty. Indeed, 81.1% of respondents consider the corona to be a serious problem for associations. Only a handful remain optimistic.

12. Do you think your association will be able to survive the social and economic impacts of the pandemic?



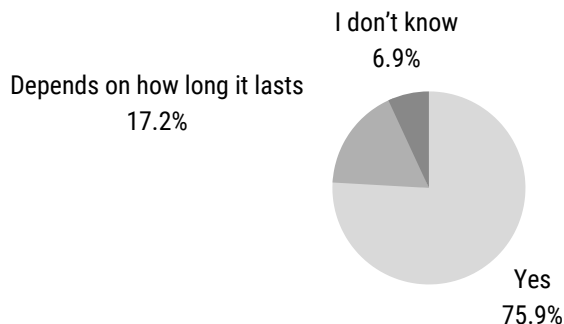
The answers to this question show that the loyalty of the congress community to associations is strong and that the majority of respondents have confidence in the return of international associations.

13. Based upon what you have seen, heard and experienced, please rank the following associations according to their reliability and power of communication during COVID-19?

MPI - Meeting Professionals International	11.7
SITE - The Society for Incentive Travel Excellence	11.3
ICCA - The International Congress and Convention Association	11
AIPC - The International Association of Convention Centres	9.8
PCMA - Professional Convention Management Association	9.6
IAPCO - The International Association of Professional Congress Organisers	8.6
ASAE - The American Society of Association Executives	8.3
ECM - European Cities Marketing	7.1
DMAI - Destinations International	6.5
AACVB - The Asian Association of Convention and Visitor Bureaus	5.2
EVVC - The European Association of Event Centres	4.5
UIA - The Union of International Association	4.2
UFI - The Global Association of the Exhibition Industry	3.7
UNICEO - United Networks of International Corporate Event Organizers	3.7

In this year's survey, we also measured how respondents perceive associations based on their reliability and power of communication. The answers depend on the membership structure of the respondents. Nevertheless, it is still the holy trinity of MPI, SITE and ICCA that tops the charts.

14. Do you think your association will be able to survive the social and economic impacts of the pandemic?



The answers to this question show that the loyalty of the congress community to associations is strong and that the majority of respondents have confidence in the return of international associations.

15. How many Association LIVE events did you attend annually BC - Before the Corona Crisis?

Before the coronacrisis, the majority attended **2 to 4 live events** (39.7%).

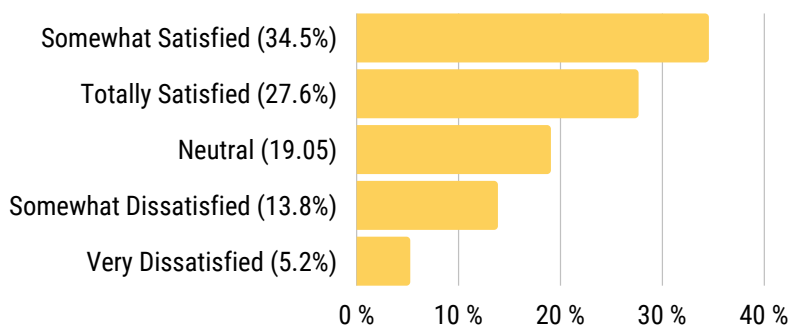
- 39.7 % - 2-4 events
- 24.1 % - 5-7events
- 22.4 % - More than
- 13.8 % - 1 event
- 0.0 % - 8-10 events

16. How many Association DIGITAL events have you attended annually DC - During the Corona Crisis?

More than 50 percent of respodents attended more than five digital events.

- 32.8 % - More than 10
- 20.7 % - 5-7 events
- 19.0 % - 8-10 events
- 14.8 % - 2-4 events
- 13.7 % - 1 event

17. How satisfied are you with MICE associations as a source of trustful information and news during COVID-19?



There is a consensus among respondents (62.1%) that international associations are a source of reliable information. As with most issues, however, doubt also arises and there is room for improvement, as always.

18. How well do you think associations use social media networks?









62.1% - Satisfactory and in line with expectations

22.4% - Not well enough, they do not communicate well

15.5% - Excellent, I get most of my information from them through social media

Most respondents are satisfied with how associations use social networks. Nevertheless, a good 22 percent of respondents are critical towards their communication.

19. Through which social networks do you want the association to communicate with you?

-  89.3 % LinkedIn
-  45.4 % Facebook
-  27.1 % Instagram
-  19.0 % Twitter
-  15.5 % YouTube
-  8.6 % Clubhouse
-  3.4 % Pinterest
-  3.4 % TikTok

The structure of answers matches our past research. The most popular trio are LinkedIn, Facebook and Instagram with a convincing lead by LinkedIn.

20. Please rank the following activities through which international MICE associations are responding to the corona crisis in order of importance to you:

News, updates and information	11.6
Free, no cost education	11.4
Replaced In-Person Events with Virtual Events	9.5
Developed New Products or Services	8.6
Cancelled In-Person Events	8.4
Created Forums for Virtual Events	7.7
Exchanging best practices for crisis	7.4
Postponed In-Person Events	7.1
Delayed Membership Dues Collection	5.6
Charitable activities	4.6
Reduced the Number of Employees	4.3
Reduced Membership Dues	4.0

21. How INNOVATIVE and CREATIVE do you think your main association is?



Number of stars 7.2/10

22. How well does the association ADVOCATE on your behalf?

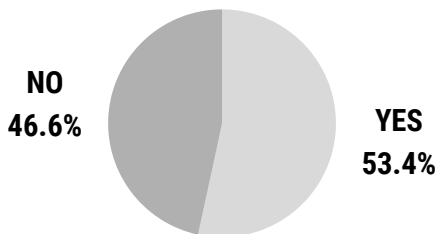


Number of stars 6.5/10

23. What types of events would you like for the association to organise more in the future?

- 63.8 % - Live networking events
- 58.6 % - Live conferences
- 46.6 % - Live seminars
- 37.9 % - B2B trade shows
- 36.2 % - Online webinars
- 36.2 % - Multi-hub events
- 27.6 % - Leadership events
- 22.4 % - Teambuildings
- 15.5 % - Virtual events
- 15.5 % - Exclusive VIP events
- 13.8 % - Online conferences
- 8.6 % - Fundraising events

24. Does the association provide you with education and certification programmes that enable you to further your career as a professional?



*If YES, what kind of programmes?

- MPI Certificate Programmes
- IAPCO online trainings for the members
- WebEDGE from IAPCO
- CITP cis
- ICCA Skills programme
- MEETING & EVENT MANAGER, ITALY
- CPD
- MICE MEDICAL
- MEM - Meeting and Event Manager

The answers to this question show how strong and intense the desire to participate in live events is. Despite all the possibilities offered by digital solutions, it is clear that live events are extremely important and will continue to be so in the future.

25. How would you prefer to meet members of the association in future?

- 51.7 % - In-person networking events
- 25.9 % - Annual events live
- 8.6 % - Via digital events
- 5.2 % - Via online social communities
- 5.2 % - Social/cultural events social communities
- 1.7 % - Monthly meetings

26. What suggestions do you have to help improve the work of associations, to include more people and expand membership?

- Cut costs, decrease the fee... since many left for financial reasons
- Better communication with the MICE industry
- Involve both suppliers and clients in activities
- Quality before quantity, also for membership!
- Keep membership dues affordable and keep education relevant
- Don't expand. Focus on your / one specific area
- Be much more present on the social media
- Innovative campaign with programme of association benefits
- Beside the general large events, it may be more efficient to do regional events as well for the real benefits of the members
- Just be completely global, inclusive - interaction between chapters, but that is already starting now
- Stick to experienced and known staff
- Develop new membership models that address the local context. A one size fits all approach with membership fees and benefits is problematic to reach the potential new and future professionals.

27. How can the Association make events more valuable to you during crisis?

COMMUNICATION

- Talk to you members
- Providing information on the current situation in the world, what are the trends in the industry
- Hearing the voice of the client. Case studies. Discussion forums with a range of voices from the industry sharing ideas. Not too many online events though, less is more. Not having sessions that are too long either, as working from home doesn't allow for much time away from day to day duties.
- More communication related to actual problems of the members

CONTENT

- Interesting topics, great speakers
- Organise very specific events with very specific solutions/experiences
- Giving an international vision and sharing new trends and best practices

STRATEGIC

- Try to organise anything that is at no cost - We experienced with MPI, that they are only doing dozens of payable online courses with some discounts to the members, and did 1 free online networking/informative event. The industry collapsed, we do not have incomes, cannot spend on anything, not even on the membership fee. During bad times, the support is everything, and this we did not feel. Maybe in US they did more support, it did not reach Europe.
- It would be helpful to look into consolidation, and less duplication of initiatives especially in the education provision sphere. It is no longer viable and affordable to be a member of so many different associations as membership tiers to not address entry to market tiers and the difference between established and emerging/developing destinations.

OTHER

- Understanding our needs as a policy maker and be our voice on governmental levels
- More geo-political power and lobbying
- Go virtual and then hybrid
- Provide access to education, act as an advocate with the government, maintain the community
- Bring more specialists and hold educational webinars , live conferences and B2B networking events

28. Please specify any other concrete actions that could be helpful in ensuring a greater legacy of international associations?

- Associations should not go into the direction they want, they should go into the direction of the needs and the sector
- More pressure for governmental institutions
- More mentorship & networking programmes
- Build and enhance the community approach!
- Better at government advocacy for an underrepresented industry
- Agree with all the others what members are your focus and don't overlap.
- Personal contact with us as stakeholders
- Keep sharing knowledge and experiences
- Acting as a hub for regional informations not only for US, rather worldwide, including EU, Asia region. Having a sub board beside US board members for Europe and try offering benefits for EU members as well. If they call themselves international, please act really international, not US driven international
- Be frank, transparent and provide value to your members

Kongres Magazine's Surveys

POWERED BY TOLERANCA MARKETING RESEARCH DEPARTMENT

Ever since the epidemic started, the editorial board of Kongres Magazine has been carrying out in-depth research on the impacts of COVID-19 for the meeting industry, studying the ever-changing needs and expectations of meeting planners. As the owner of Kongres Magazine, Toleranca Marketing agency was entrusted with the logistics of carrying out the research.

Need an in-depth market research?

Get in touch with our team of creative thinkers

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We would like to thank everyone, who has taken part in the research so far. With your contribution, we are one step closer to overcoming the new pandemic reality.