

Incentive Travel Industry Survey Final

Final Q-by-Q analysis prepared by Oxford Economics

Complete surveys (n = 1,306) and incomplete surveys (n = 1,331)

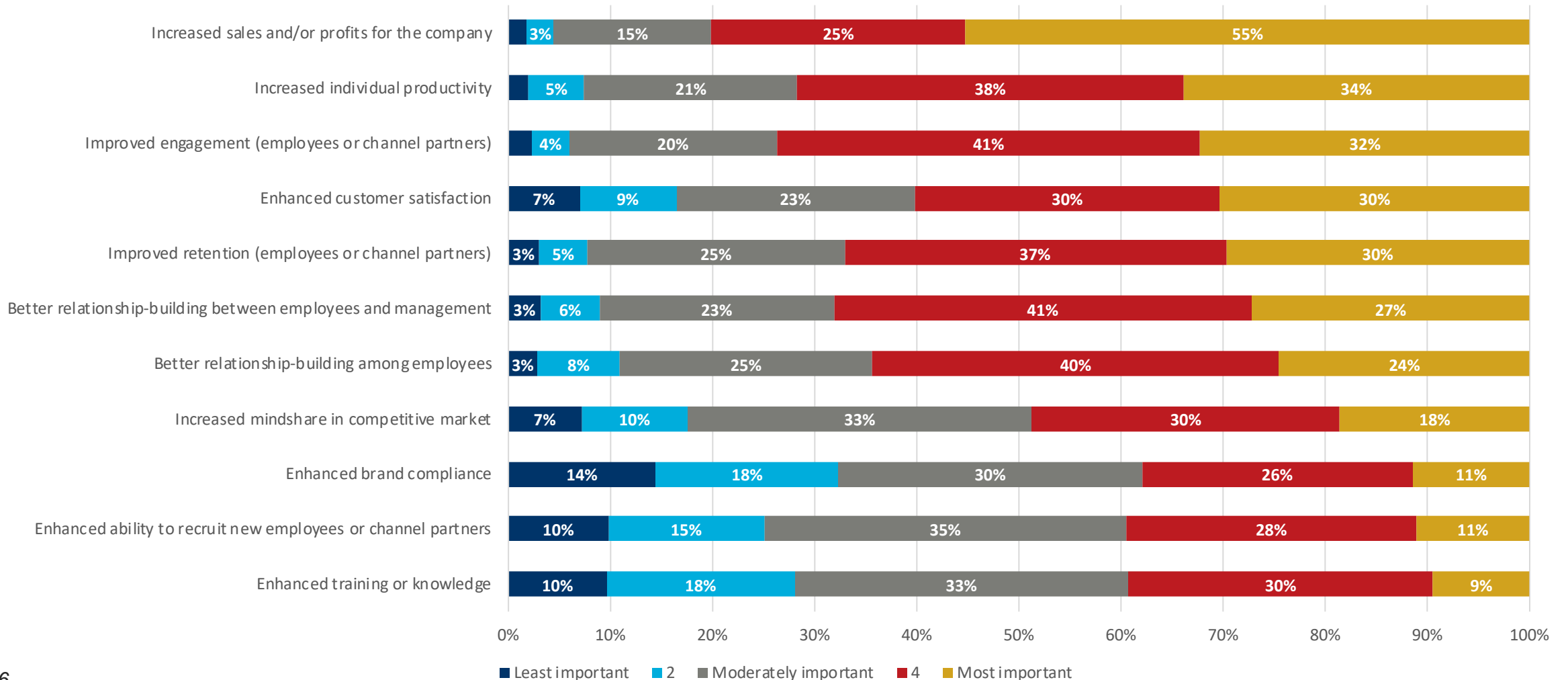
August 2019

Global survey results

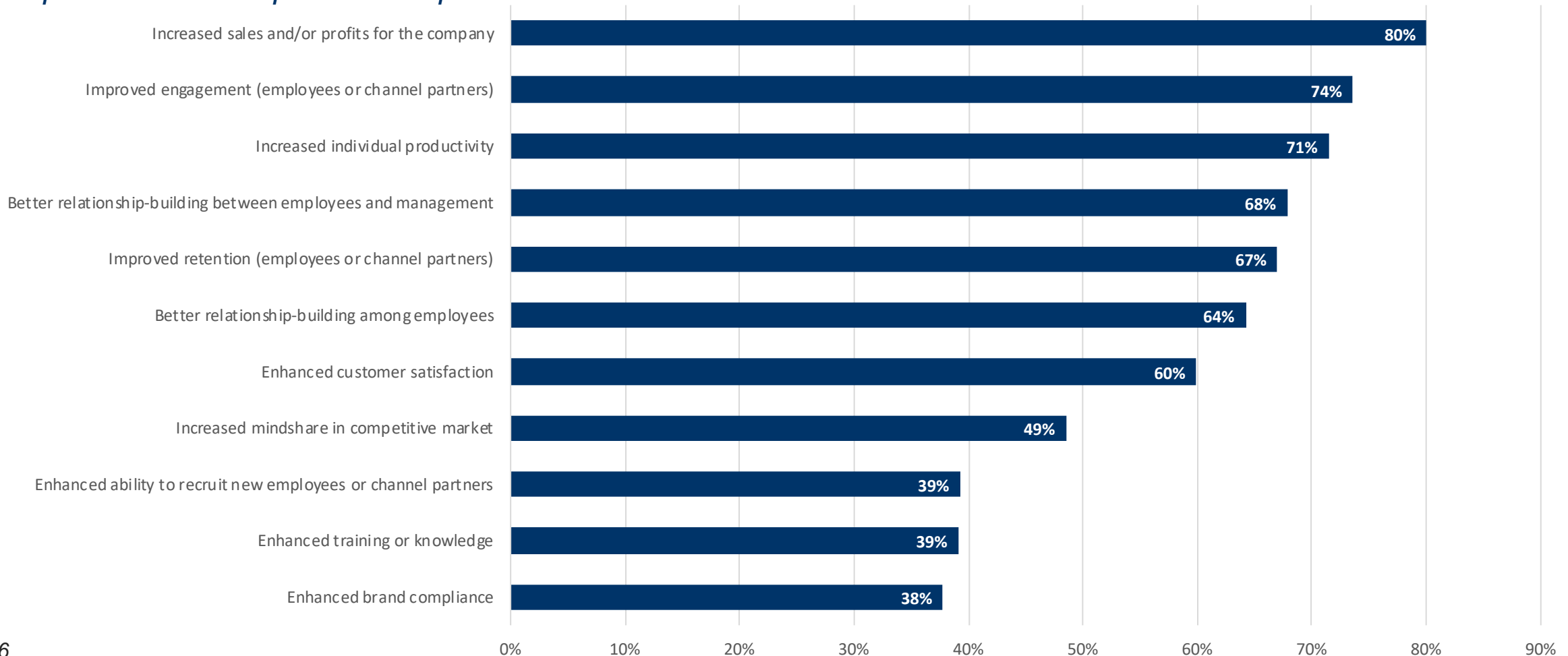


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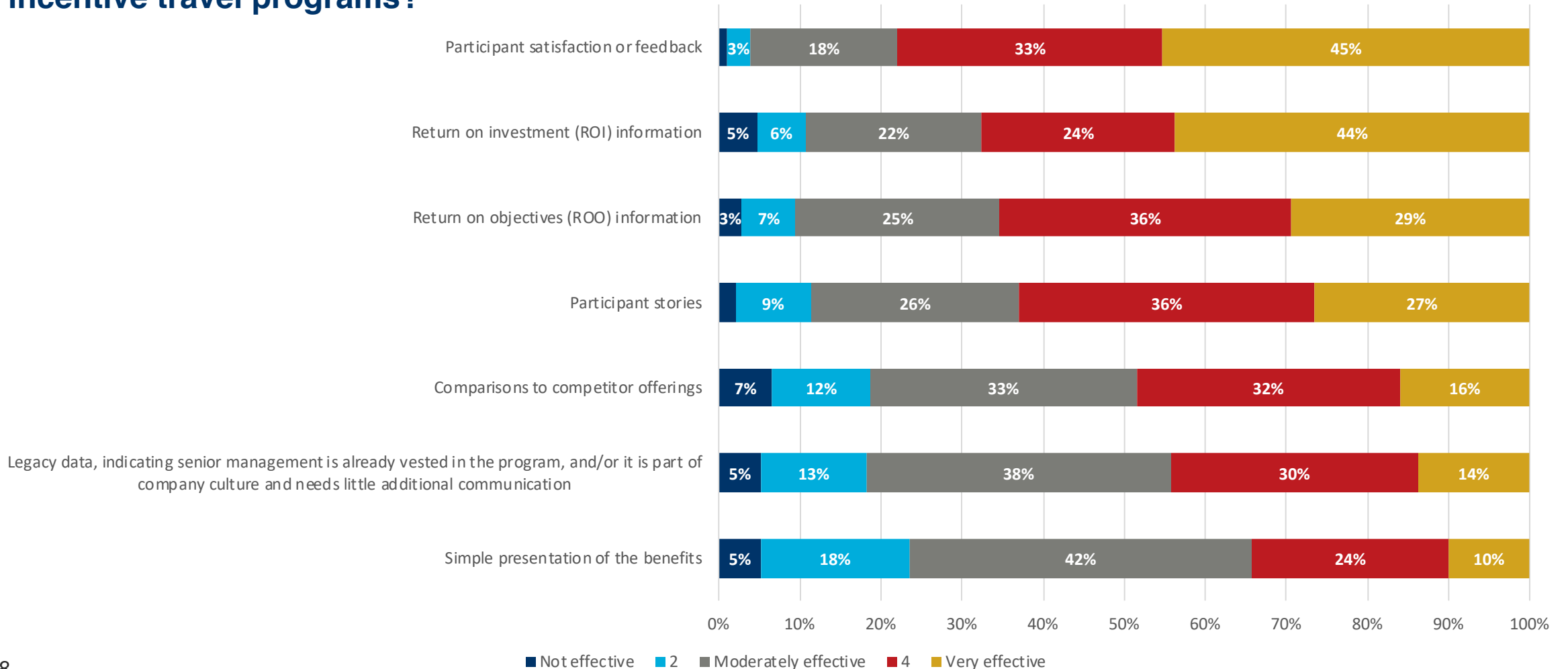
B1. What are the most important benefits your company receives from its incentive travel programs? Incentive travel agencies should answer from the perspective of their client companies.



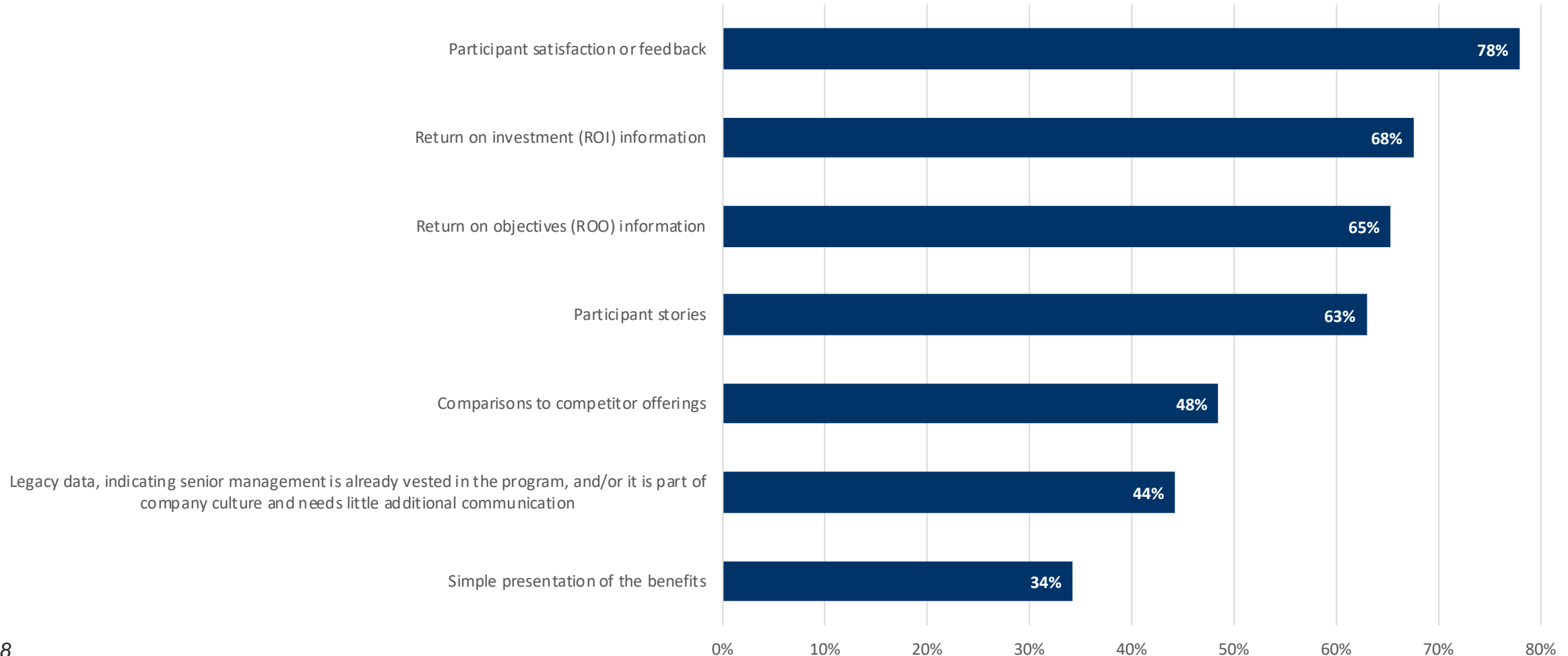
B1. What are the most important benefits your company receives from its incentive travel programs?
Incentive travel agencies should answer from the perspective of their client companies. “Most important” and “Important” responses



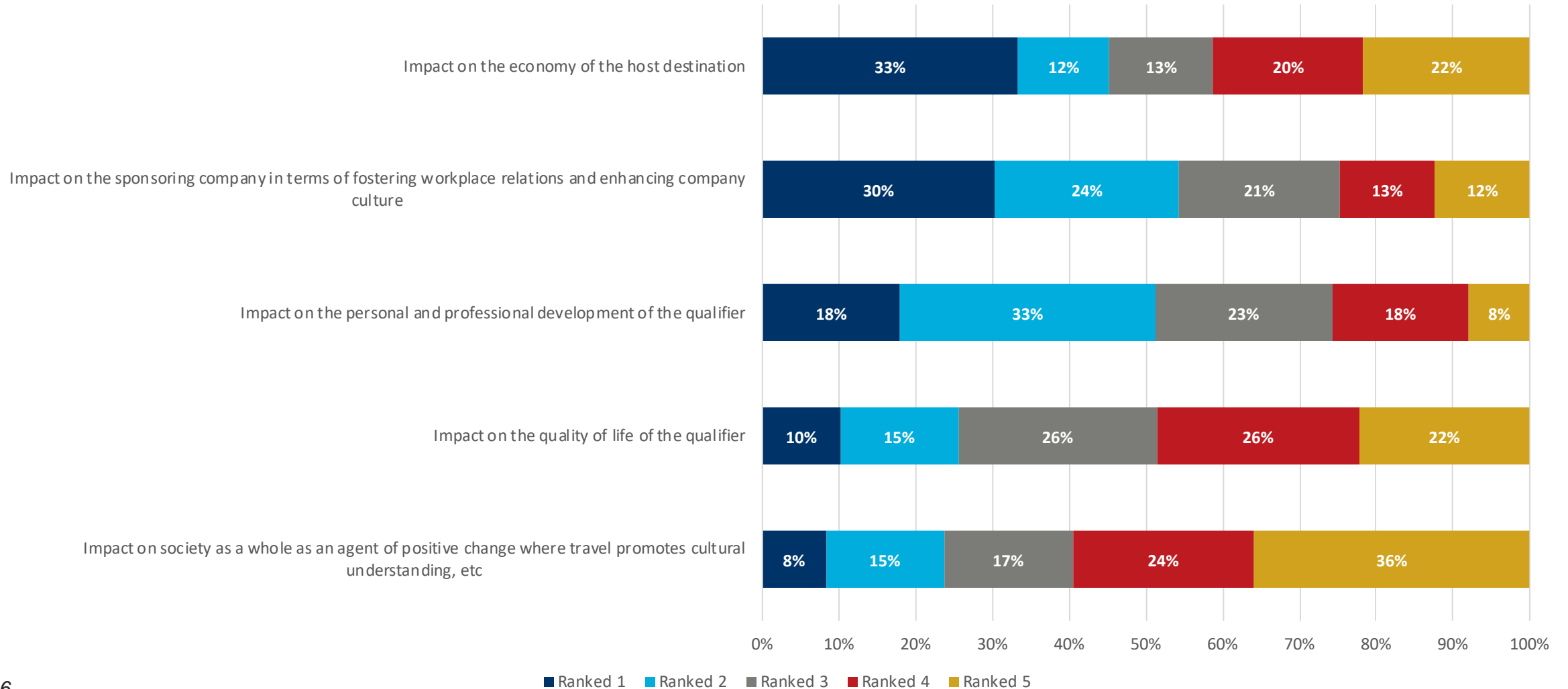
B2. Which types of information are most effective at demonstrating the value of the incentive travel program to senior management and other stakeholders at the corporations for whom you organize incentive travel programs?



B2. Which types of information are most effective at demonstrating the value of the incentive travel program to senior management and other stakeholders at the corporations for whom you organize incentive travel programs? “Very effective” and “Effective” responses

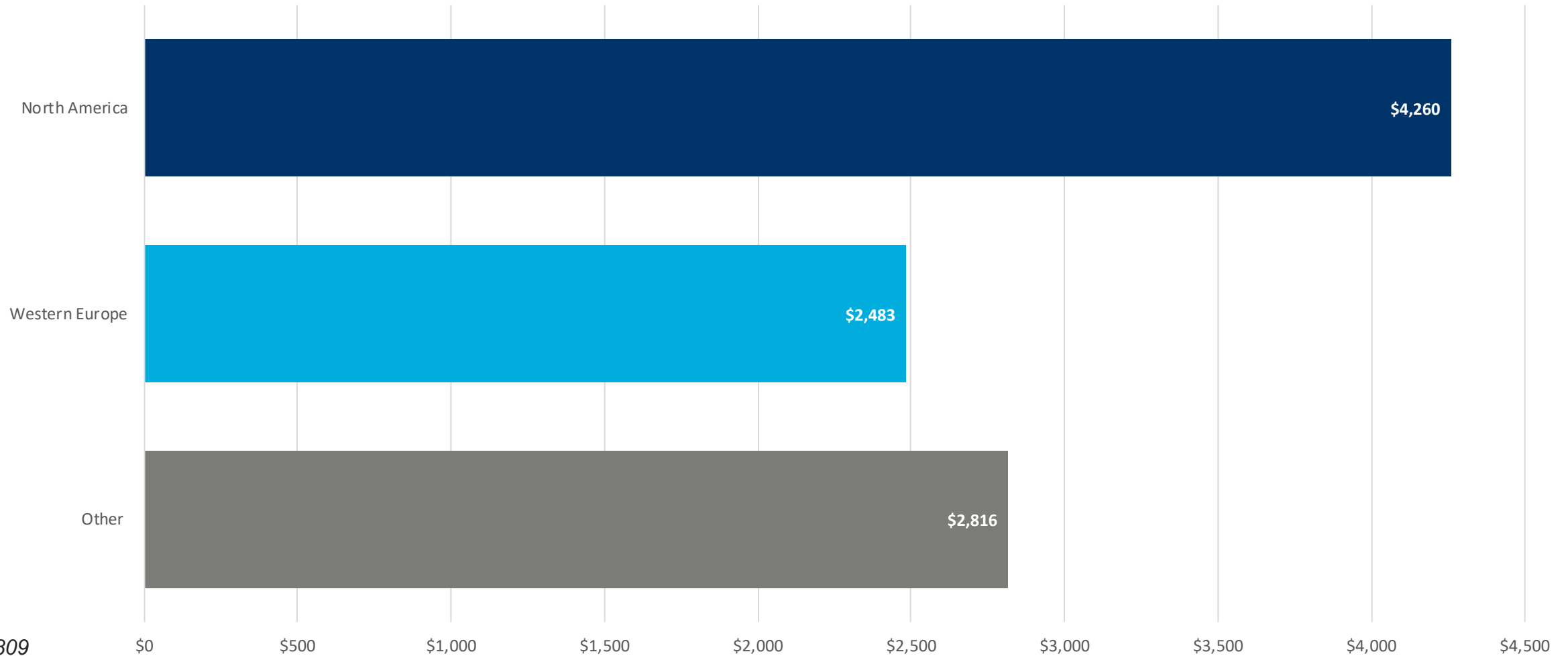


B3. Beyond the impact of the incentive travel program on the sponsoring company's bottom line, which additional impacts of incentive travel are most significant?



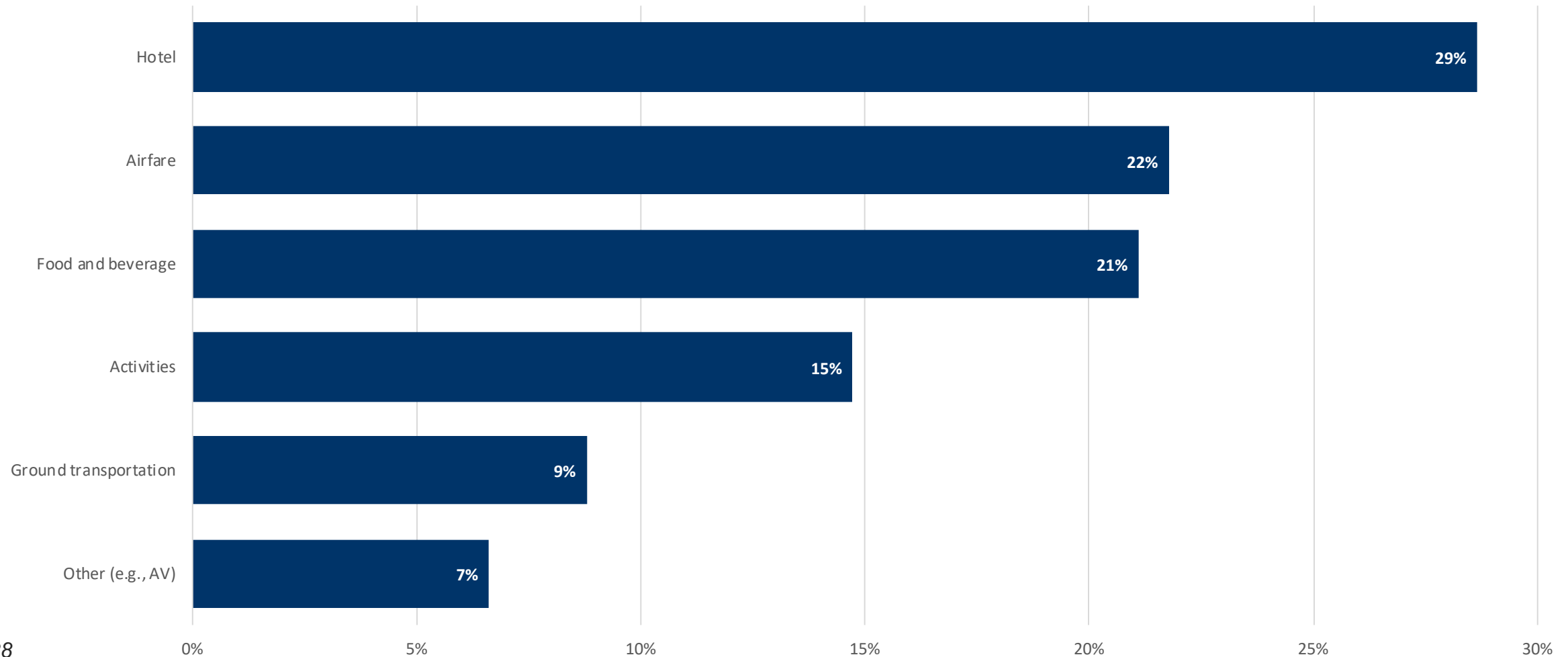


G1A. What is the approximate spend per person (total program cost divided by number of people, including qualifiers, guests and other participants in the count of people) for incentive travel programs occurring this year (2019) for which your team was responsible?

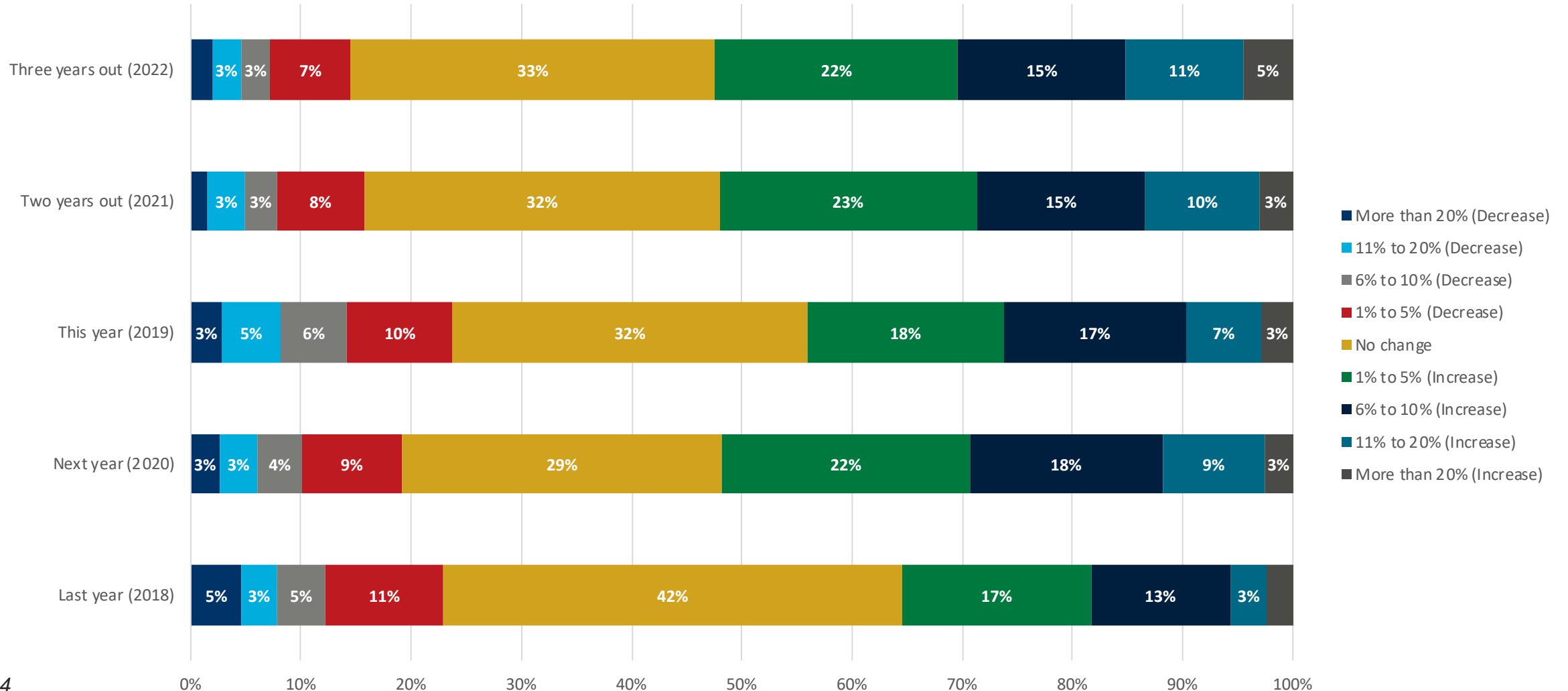




G2. While mindful that no two programs are the same, please indicate the average program budget allocation for incentive travel programs occurring this year (2019) for which your team was responsible.



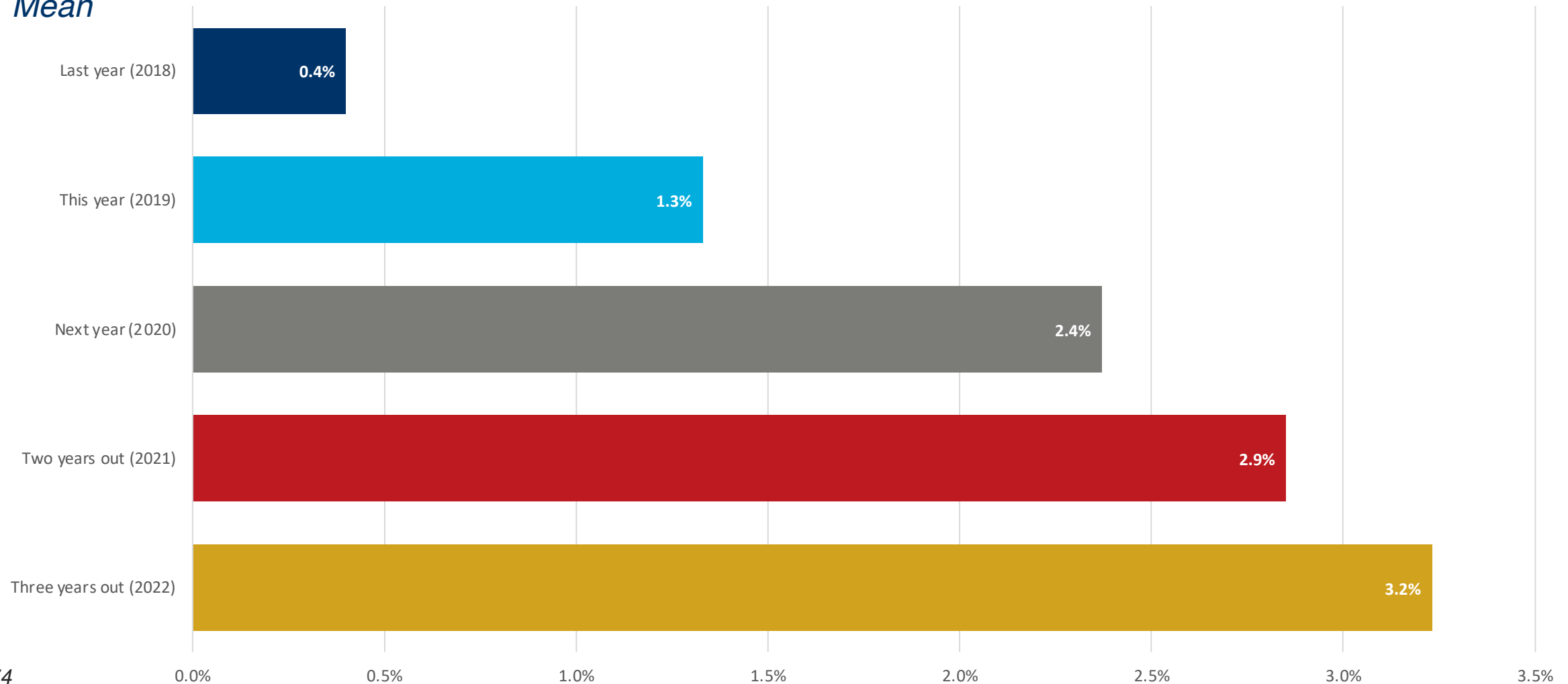
G3. How has the number of people (qualifiers, guests and other participants) in your team's incentive travel programs changed recently? How do you expect it to change this year and in future years?



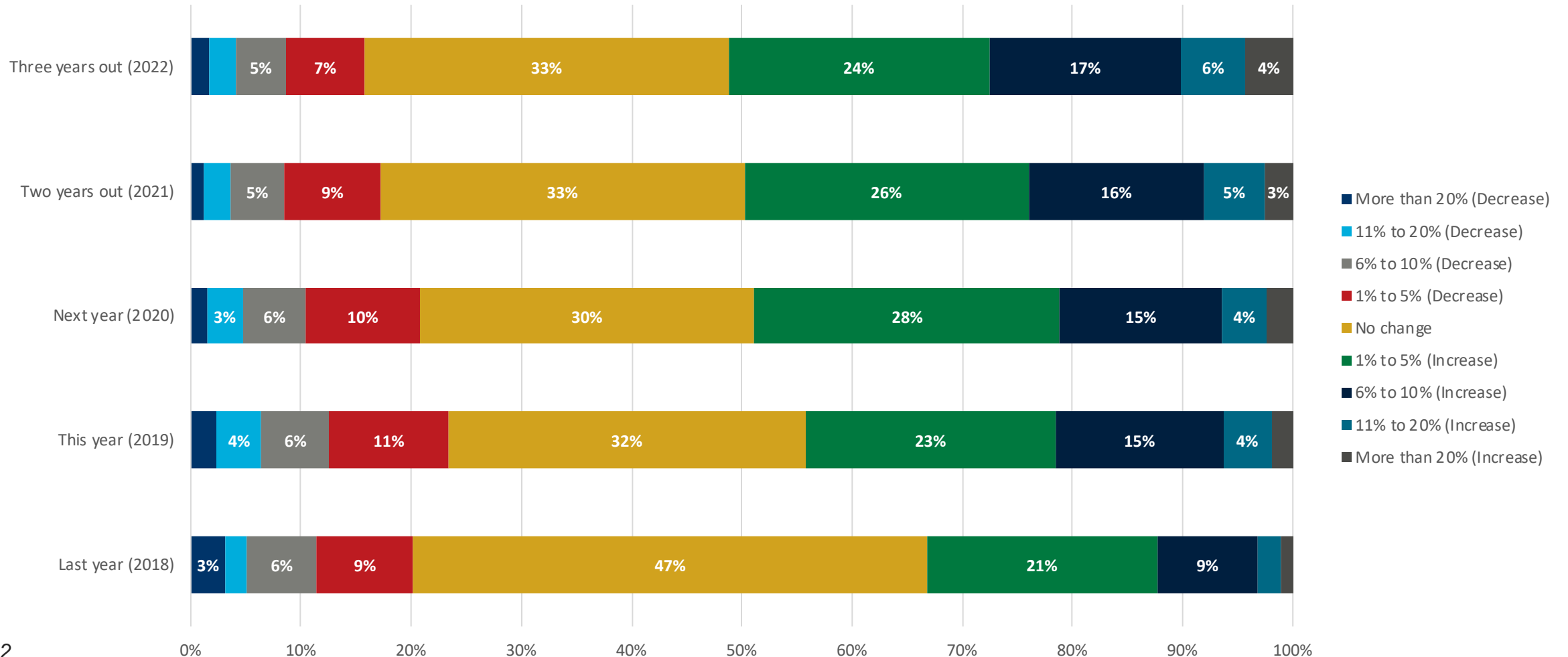


G3. How has the number of people (qualifiers, guests and other participants) in your team's incentive travel programs changed recently? How do you expect it to change this year and in future years?

Mean

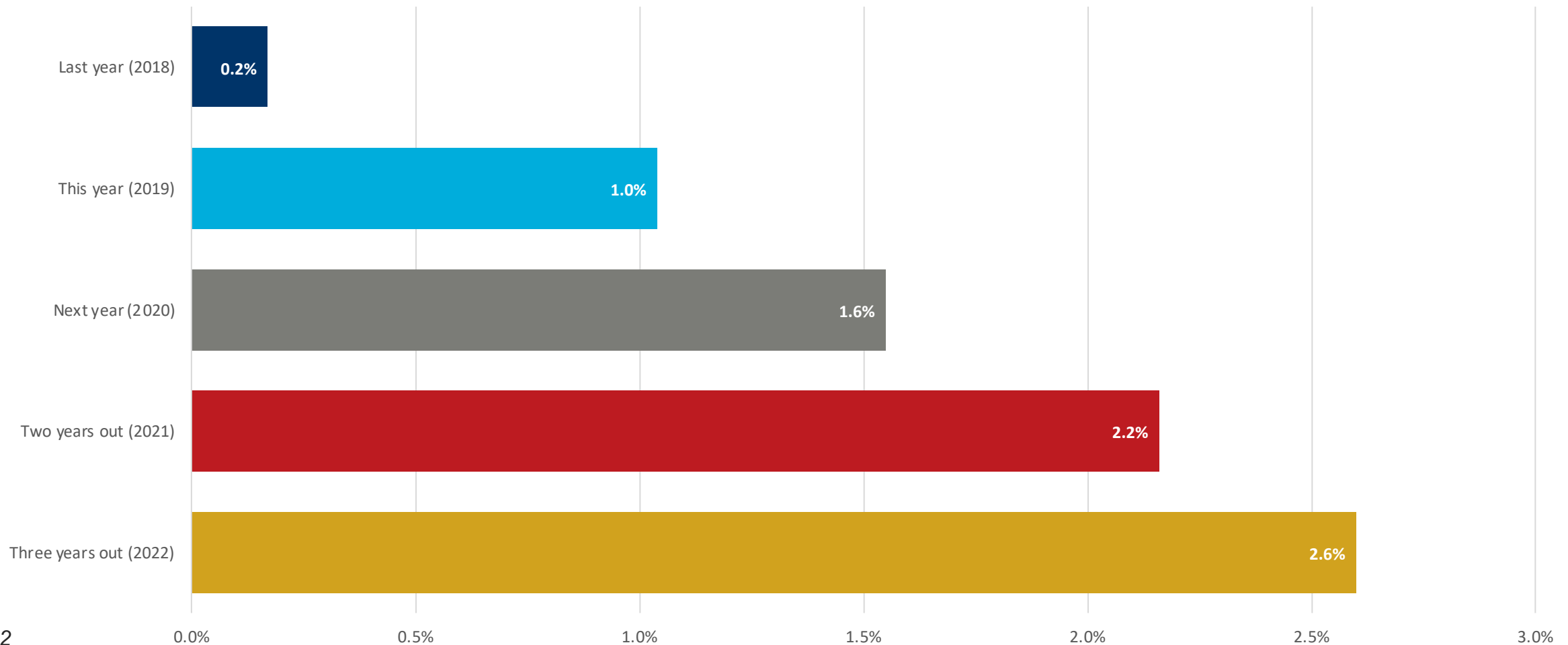


G4. How has spending per person (total program cost divided by number of people, including qualifiers and guests in the count of people) in your team's incentive travel programs changed recently? How do you expect it to change this year and in future years?

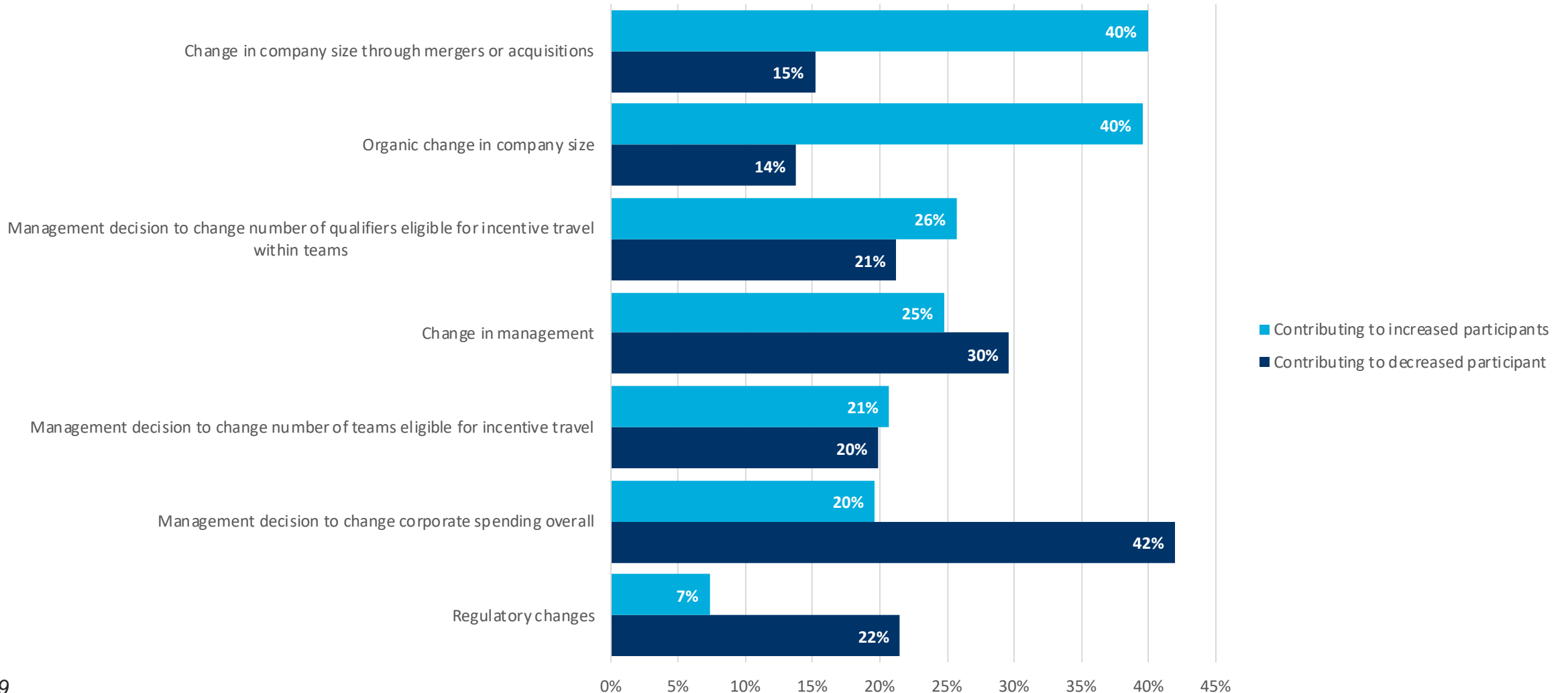




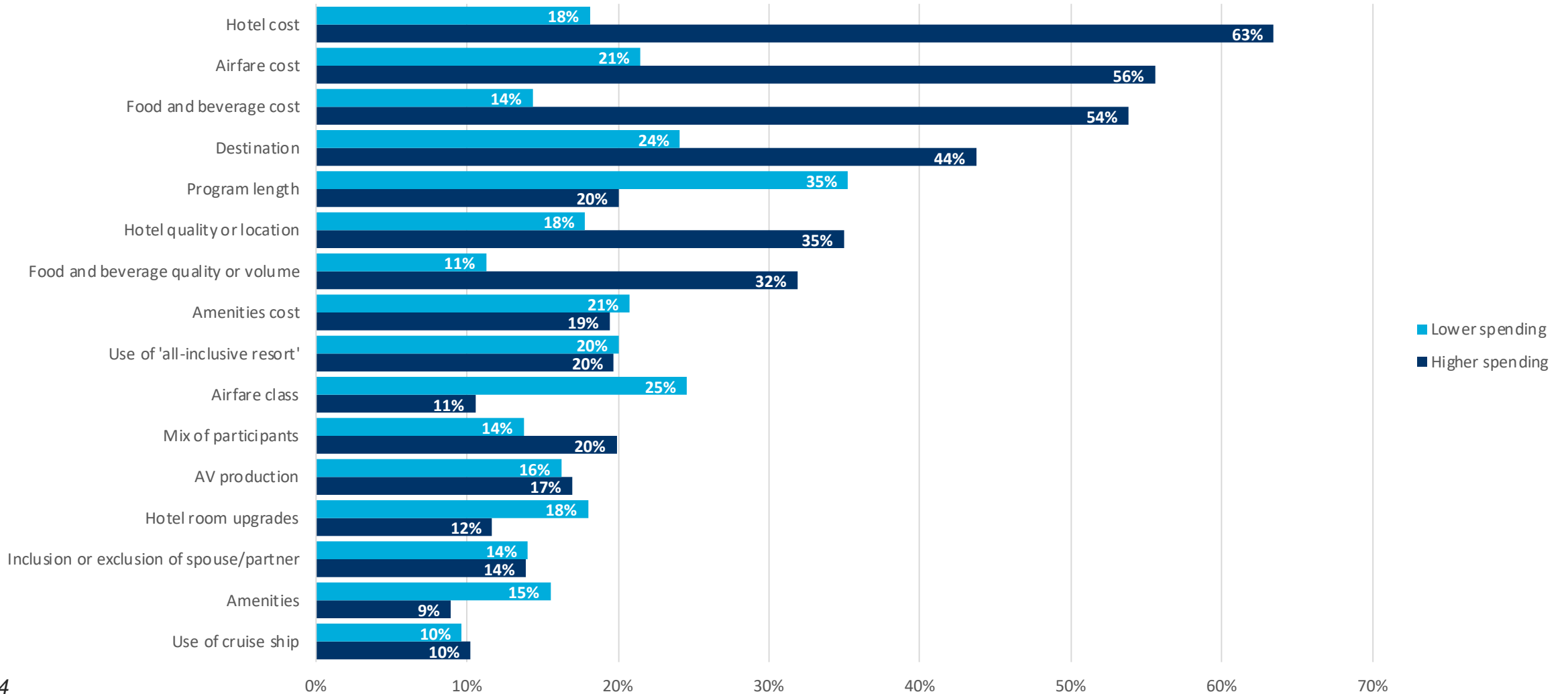
G4. How has spending per person (total program cost divided by number of people, including qualifiers and guests in the count of people) in your team's incentive travel programs changed recently? How do you expect it to change this year and in future years? *Mean*



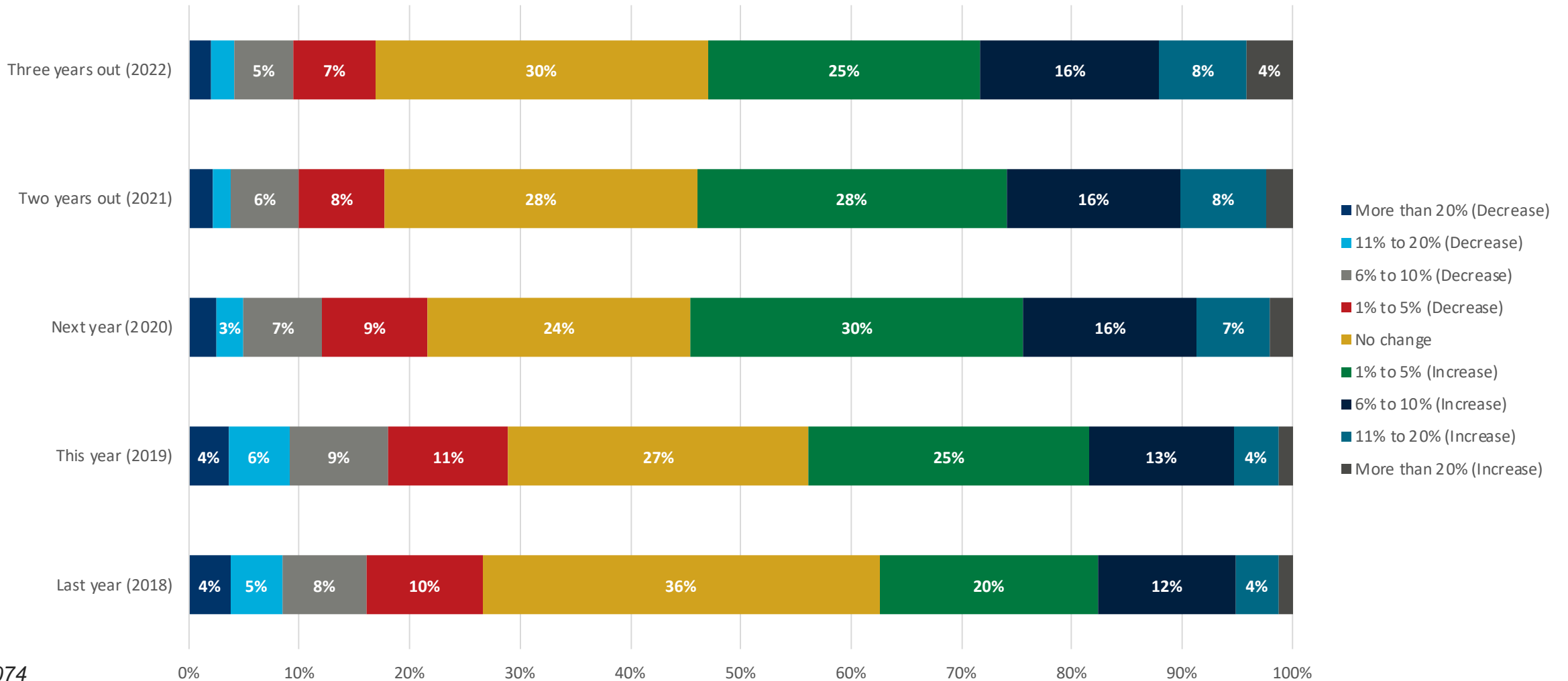
G5. What are the key trends impacting the number of people (qualifiers, guests and other participants) in your team's incentive travel programs over the next 2 years (2020 and 2021)?



G6. What are the most important trends impacting spending per person in your team's incentive travel programs over the next 2 years (2020 and 2021)?

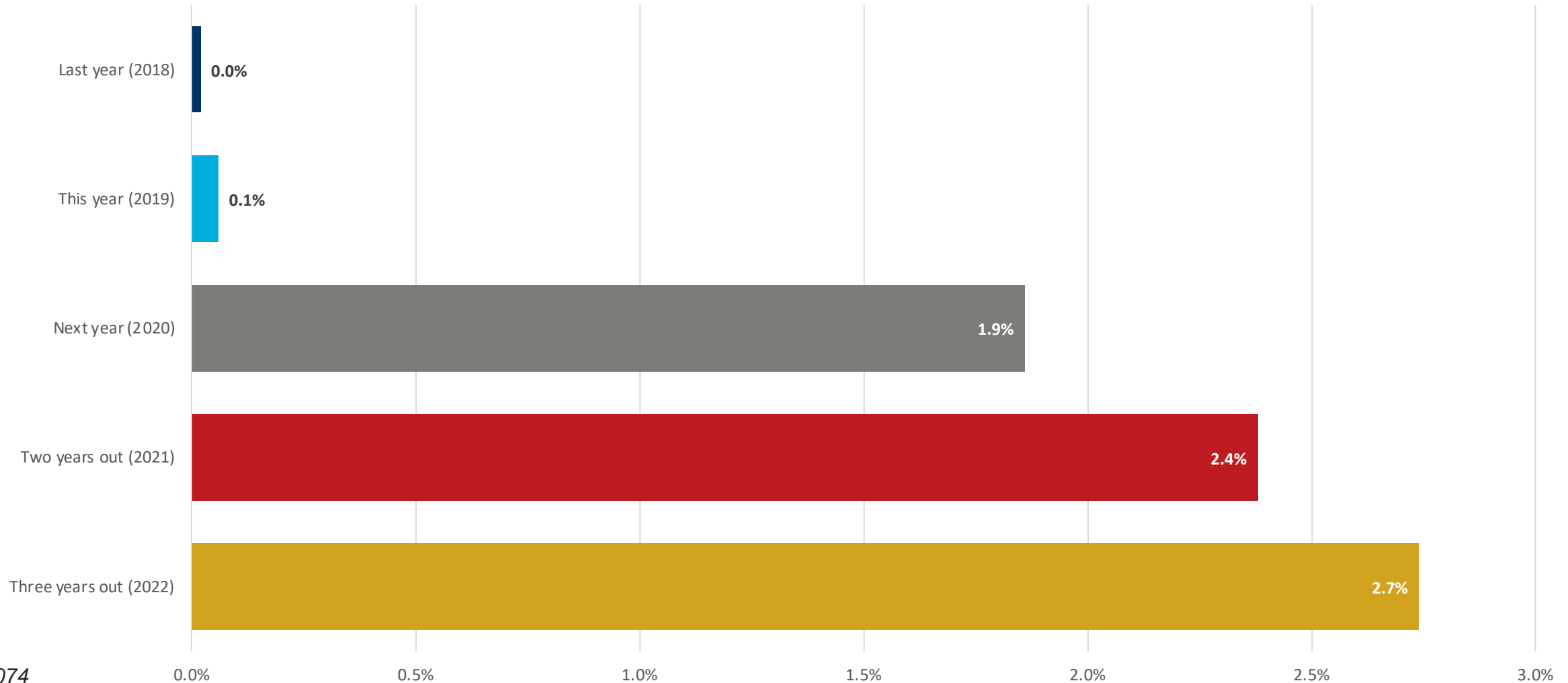


G7. How did incentive travel budgets change for programs in which your team was involved last year? How do you expect budgets to change in future years?

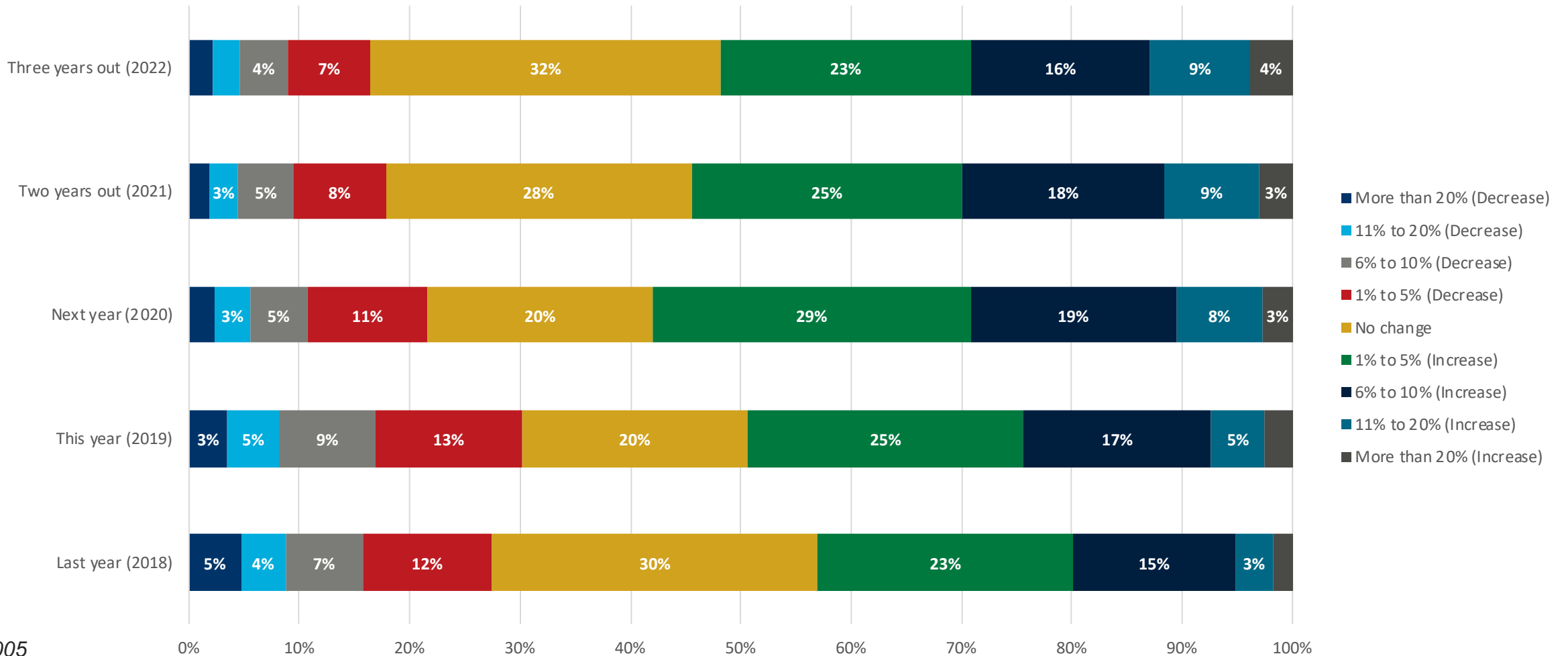




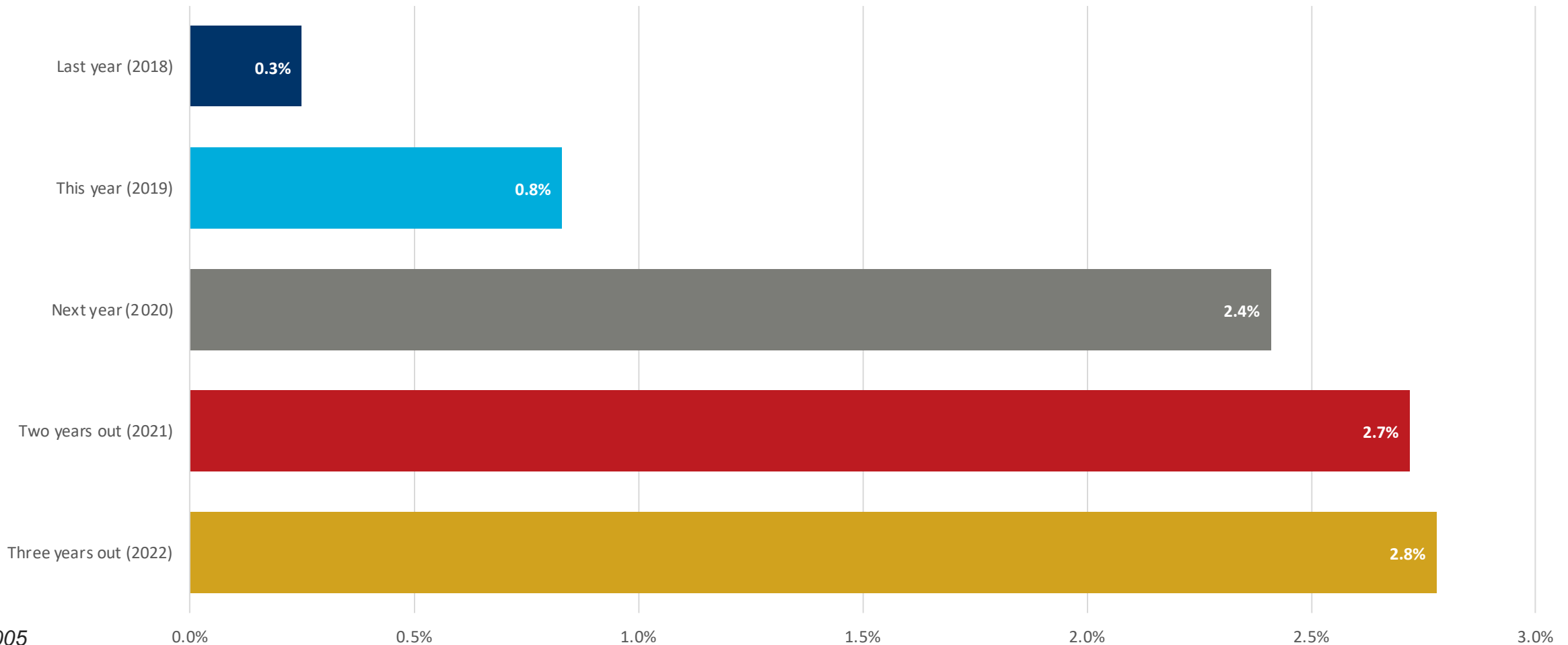
**G7. How did incentive travel budgets change for programs in which your team was involved last year?
How do you expect budgets to change in future years? *Mean***



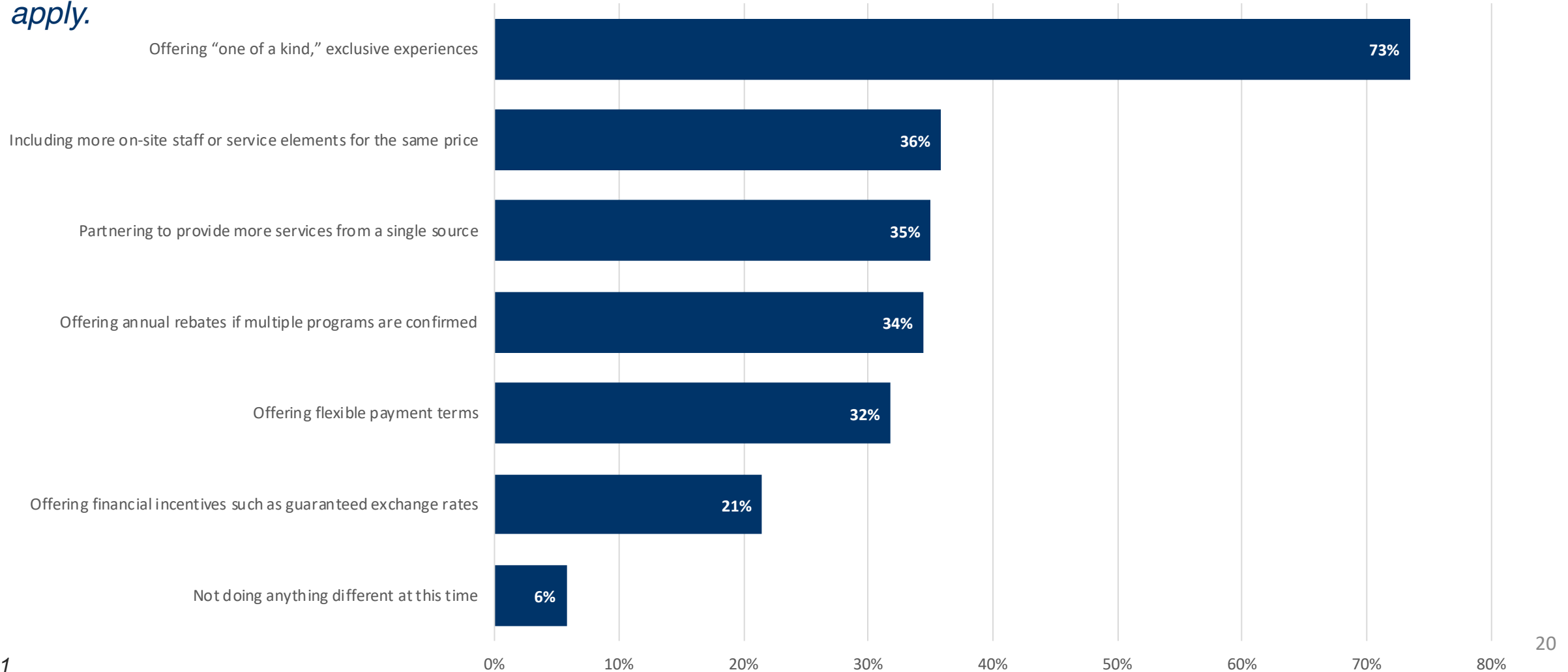
G8. How has the volume of RFPs for incentive travel programs changed in the most recent 2 years (2018 and 2019)? How do you expect that to change for programs occurring over the next 3 years (2020 – 2022)?



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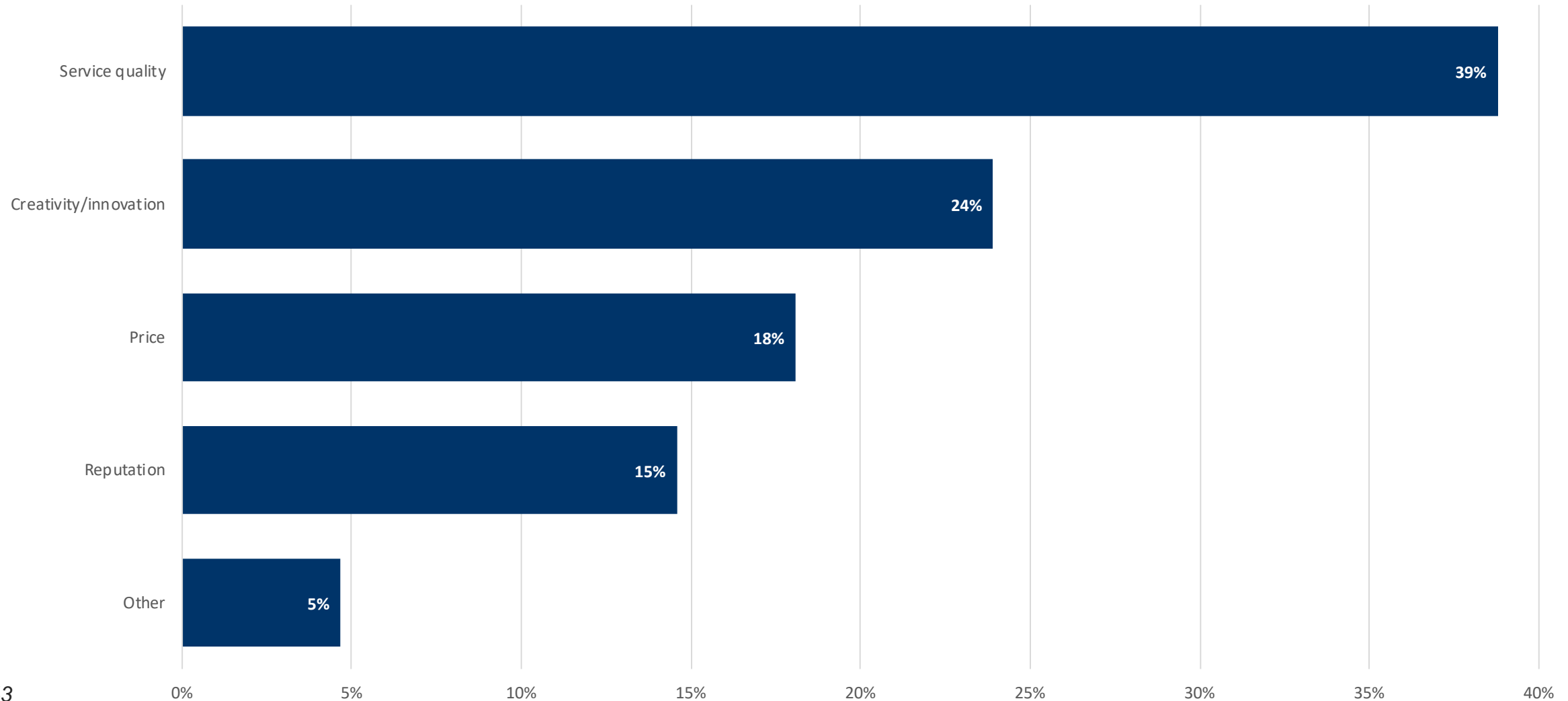


G9. When competing for contracts for incentive travel programs occurring during the next 2 years (2020 and 2021), what actions are your team taking to add value and win business? *Select all that apply.*



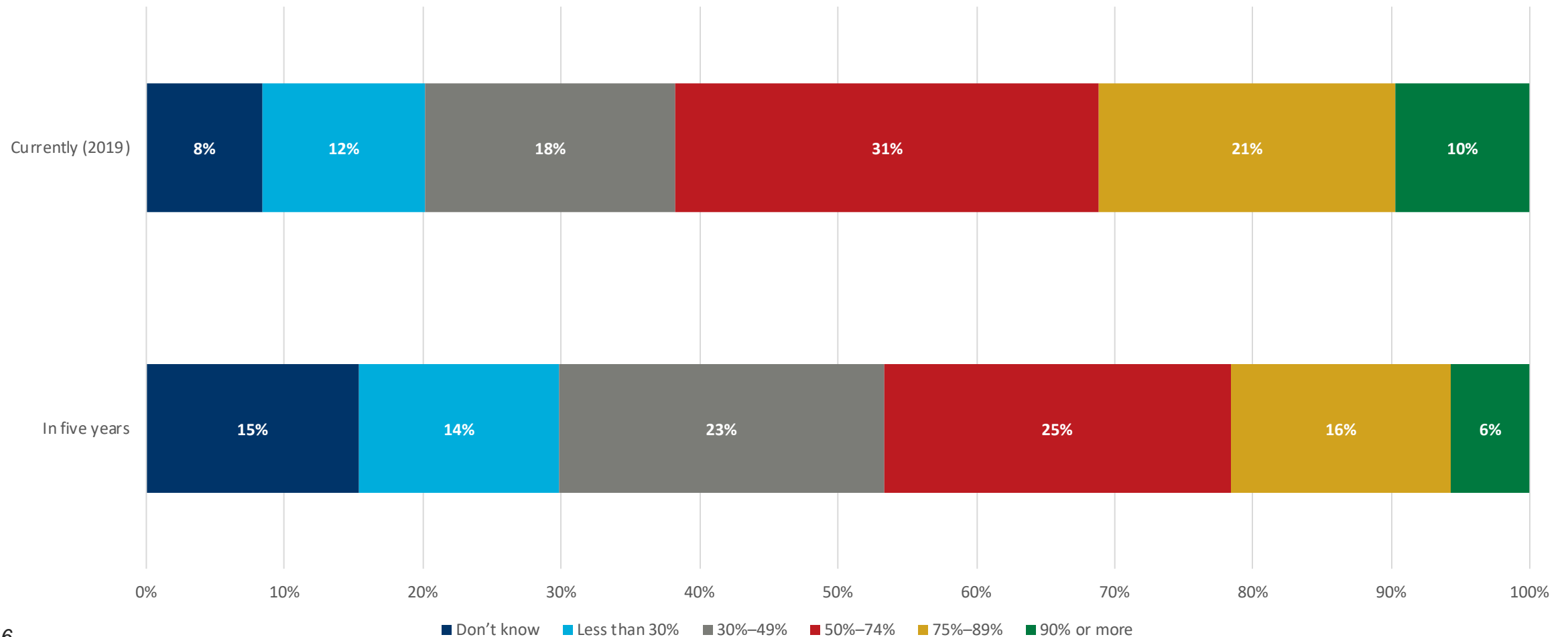


G10. What factor do you consider your strongest differentiator to win incentive travel program business?



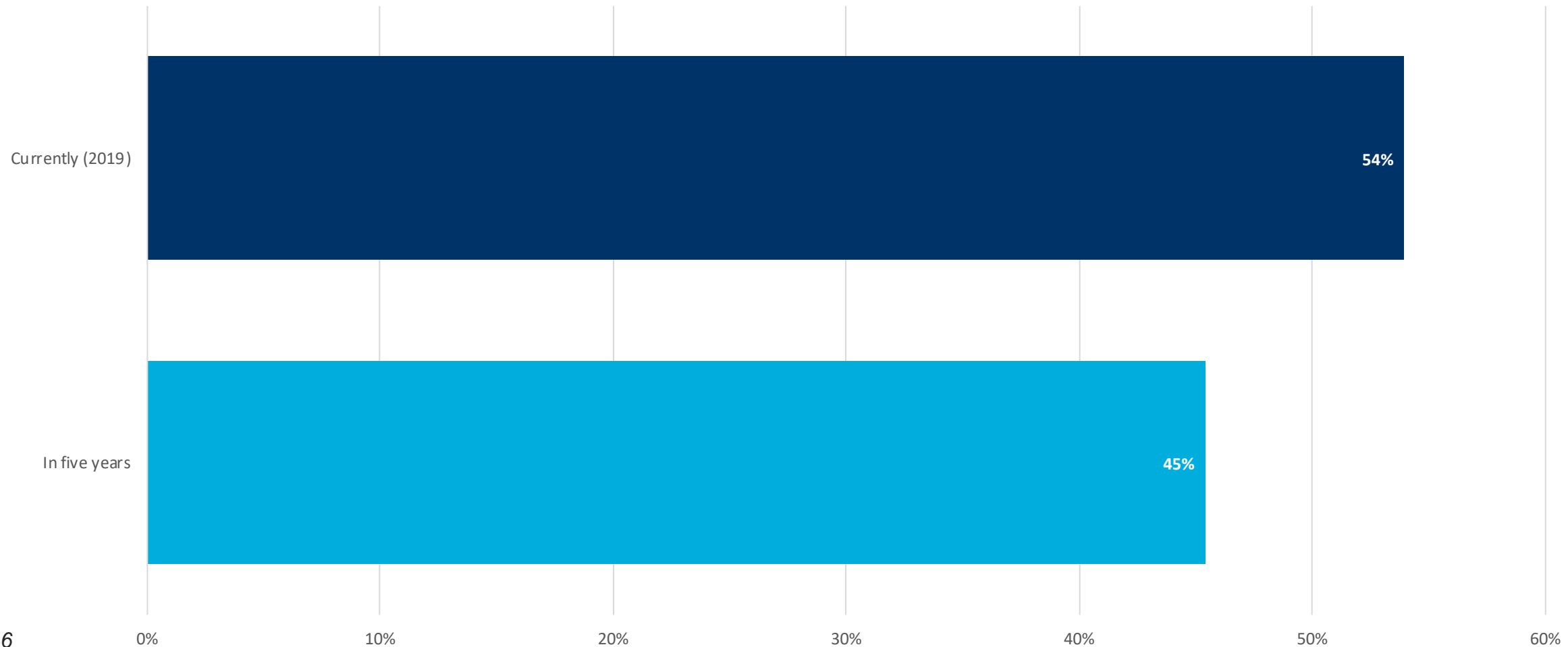


G11. What percentage of the overall spend per person in the destination (transportation, hotel, off-site functions) do you estimate is channeled through a DMC currently (2019)? How much will be channeled through a DMC in five years?





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G12. Which of the following factors are having the greatest positive and/or negative impact on your team's plans for incentive travel programs occurring over the next 2 years (2020 and 2021)? Indicate the impact of the 3 most important factors.

Increasing importance of corporate social responsibility (CSR), sustainability and being "green"

Increased tendency to combine business and leisure

An increased focus on the importance of company culture

Public perceptions of incentive travel

Financial outlook of the company

National economy

Changes to incentive programs offered by the company's competitors

Internal stakeholder perceptions of the program

Global economy

Air travel costs

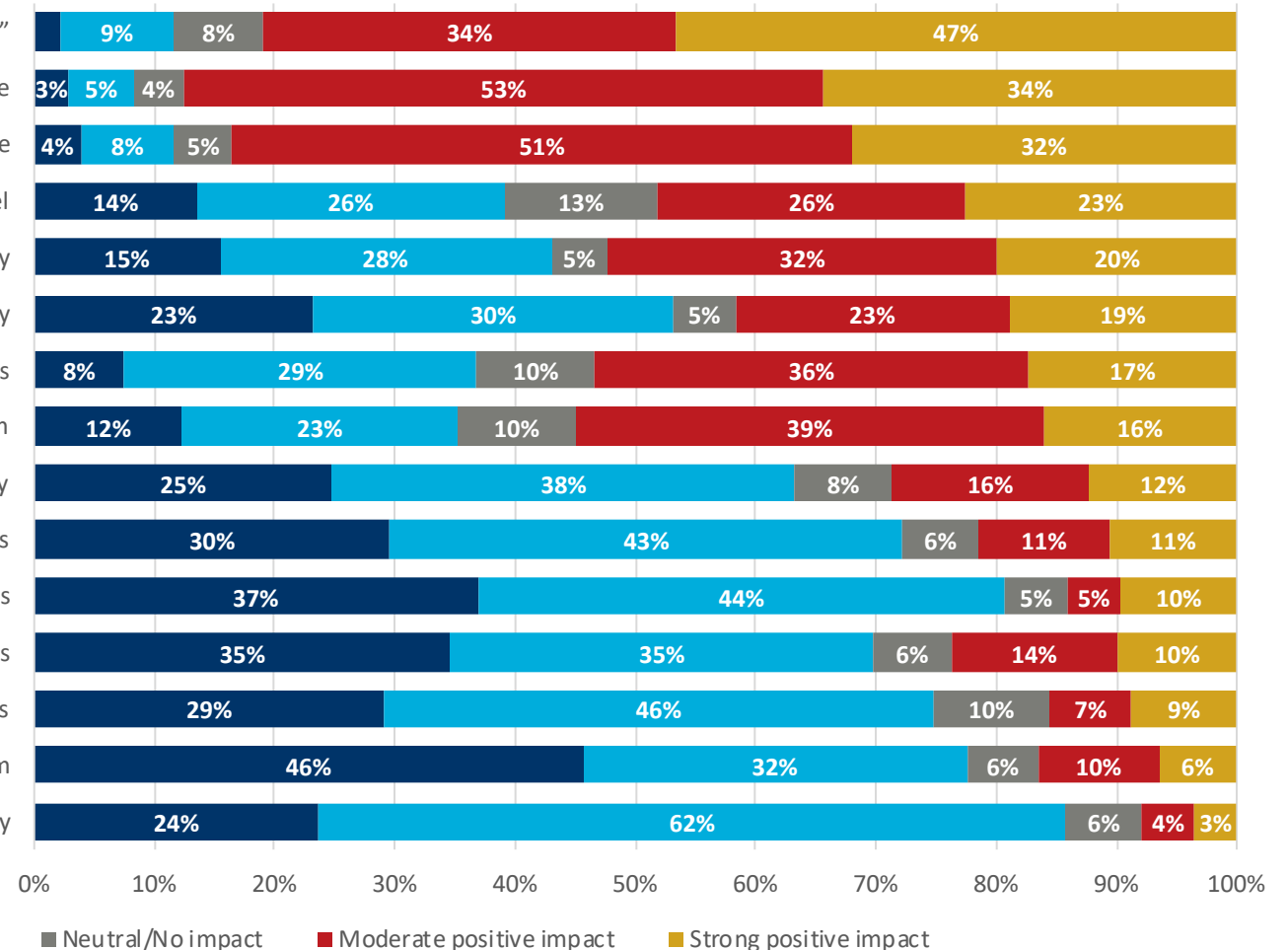
Natural disasters

Government policies or other regulations

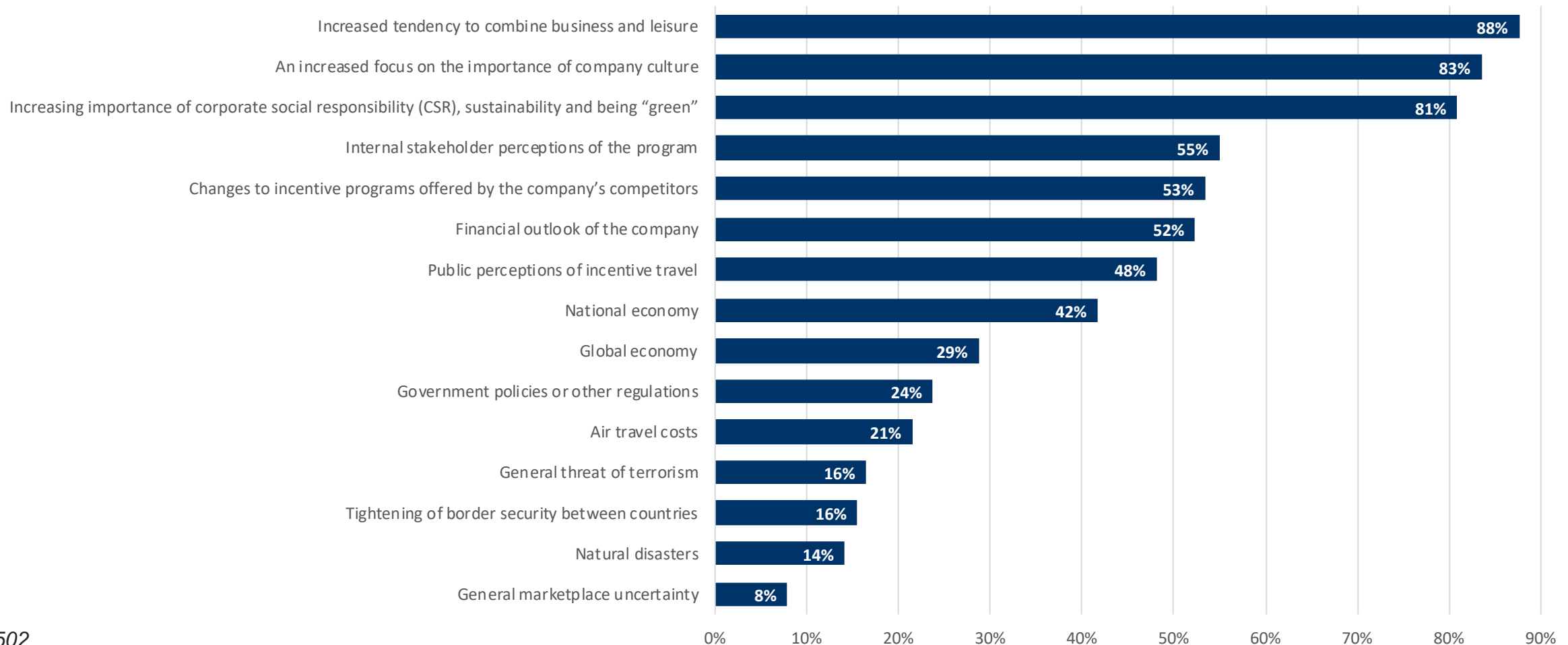
Tightening of border security between countries

General threat of terrorism

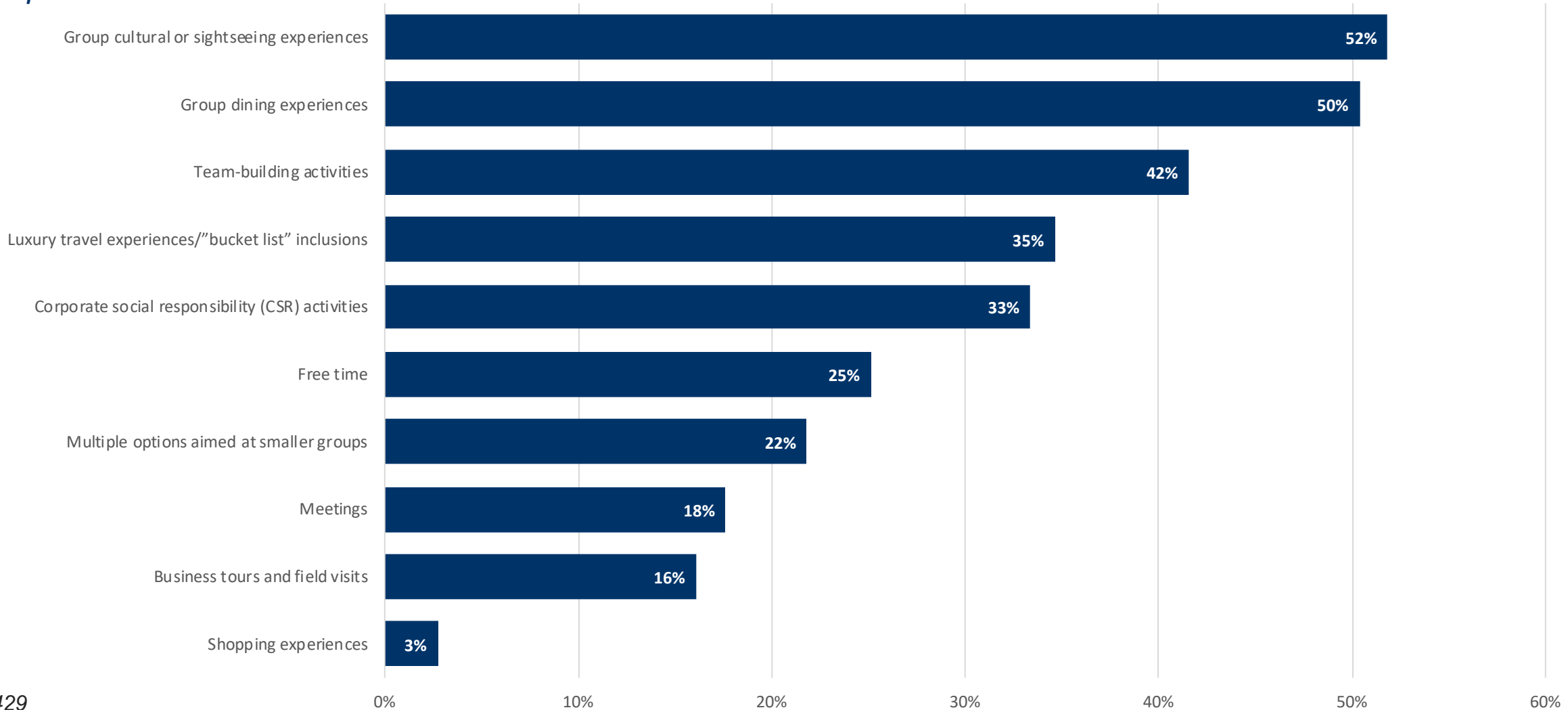
General marketplace uncertainty



G12. Which of the following factors are having the greatest positive and/or negative impact on your team's plans for incentive travel programs occurring over the next 2 years (2020 and 2021)? *Indicate the impact of the 3 most important factors. "Strong positive impact" and "Moderate positive impact" responses*

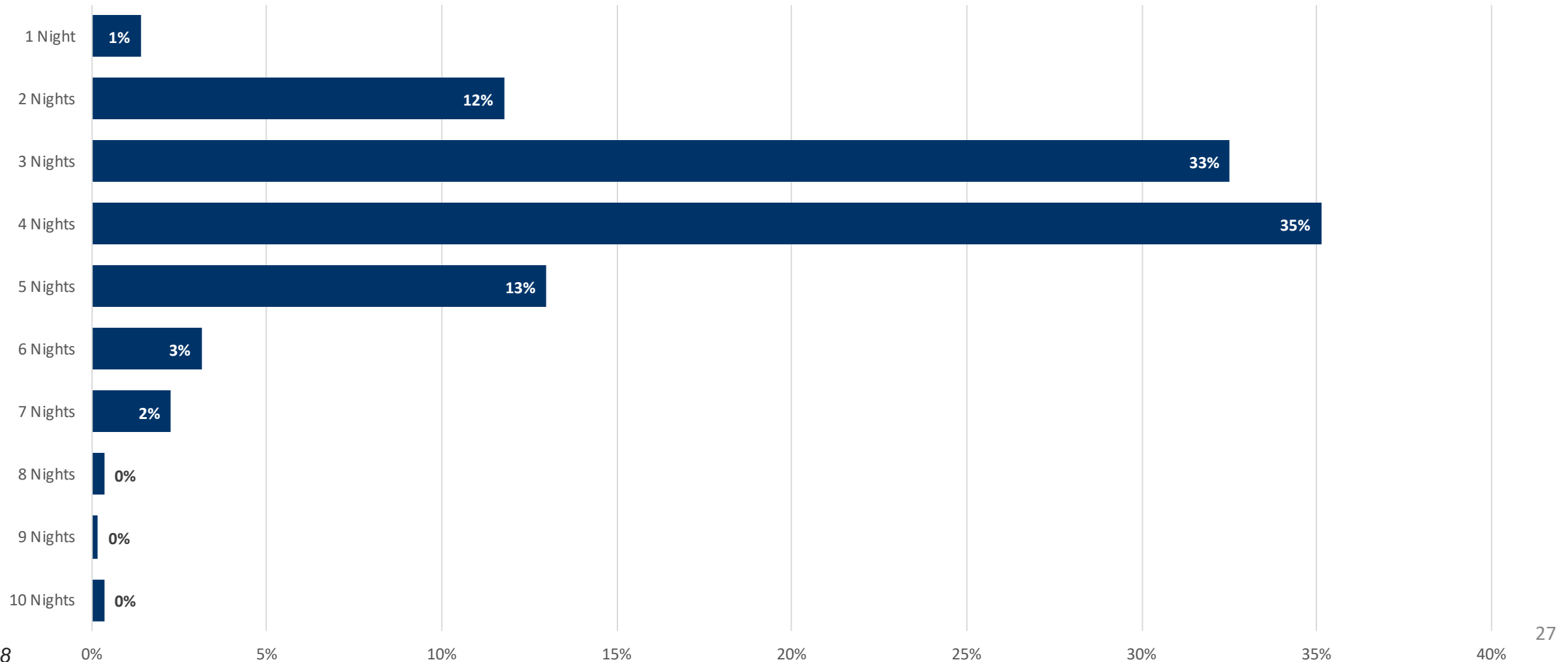


P1. What activities do you consider most important for a successful incentive travel program? *Select up to 3.*



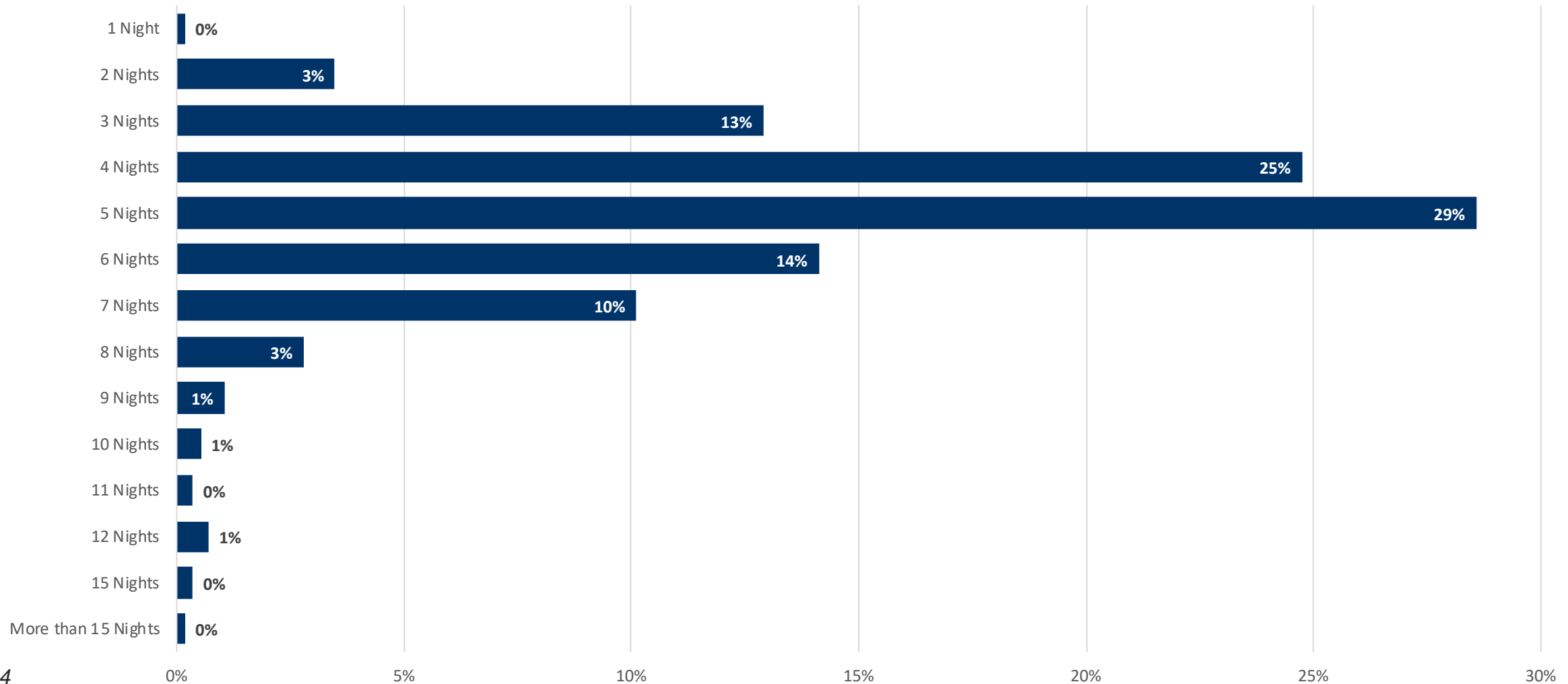


P2. What is the usual length of stay for incentive travel programs occurring in the next 2 years (2020 and 2021) that require 4 hours or less of travel time (one way)?



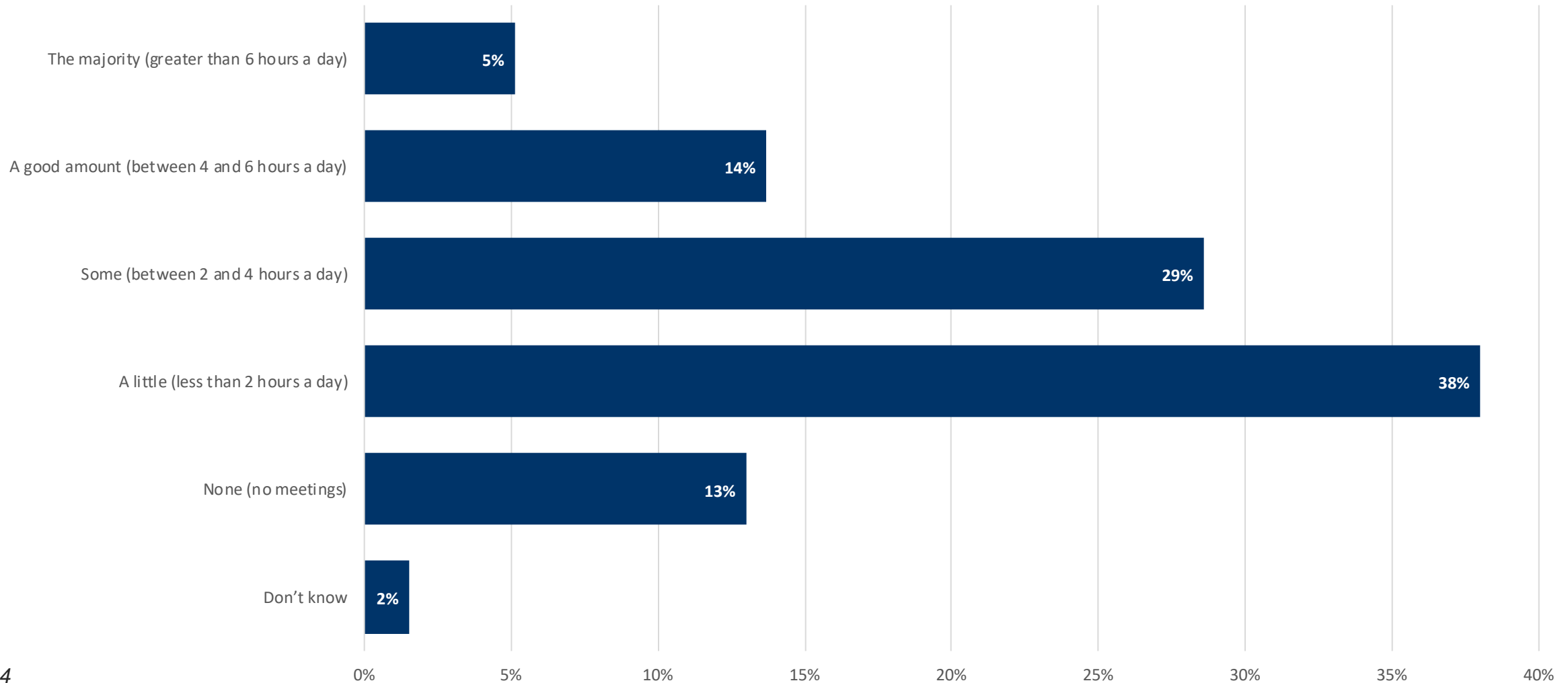


P3. What is the usual length of stay for incentive travel programs occurring in the next 2 years (2020 and 2021) that require more than 4 hours of travel time (one way)?

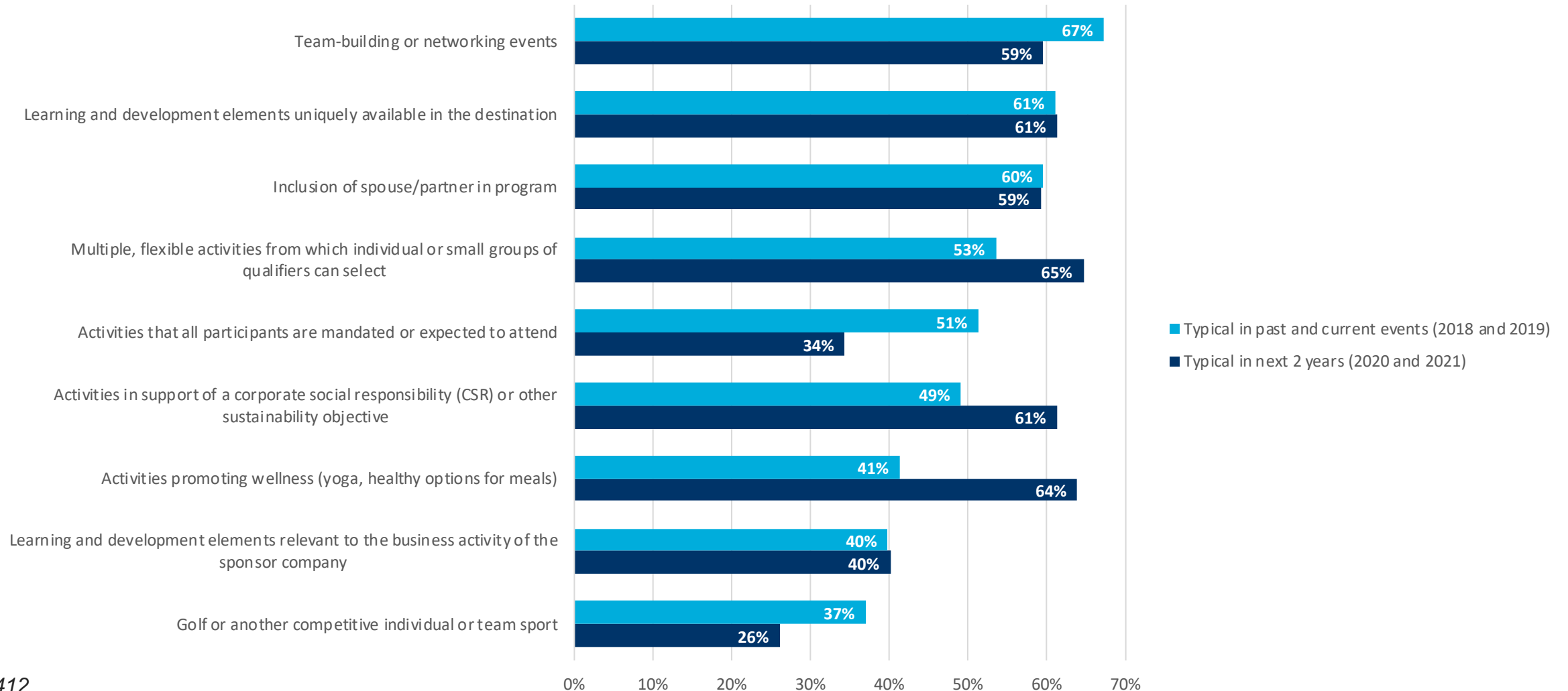




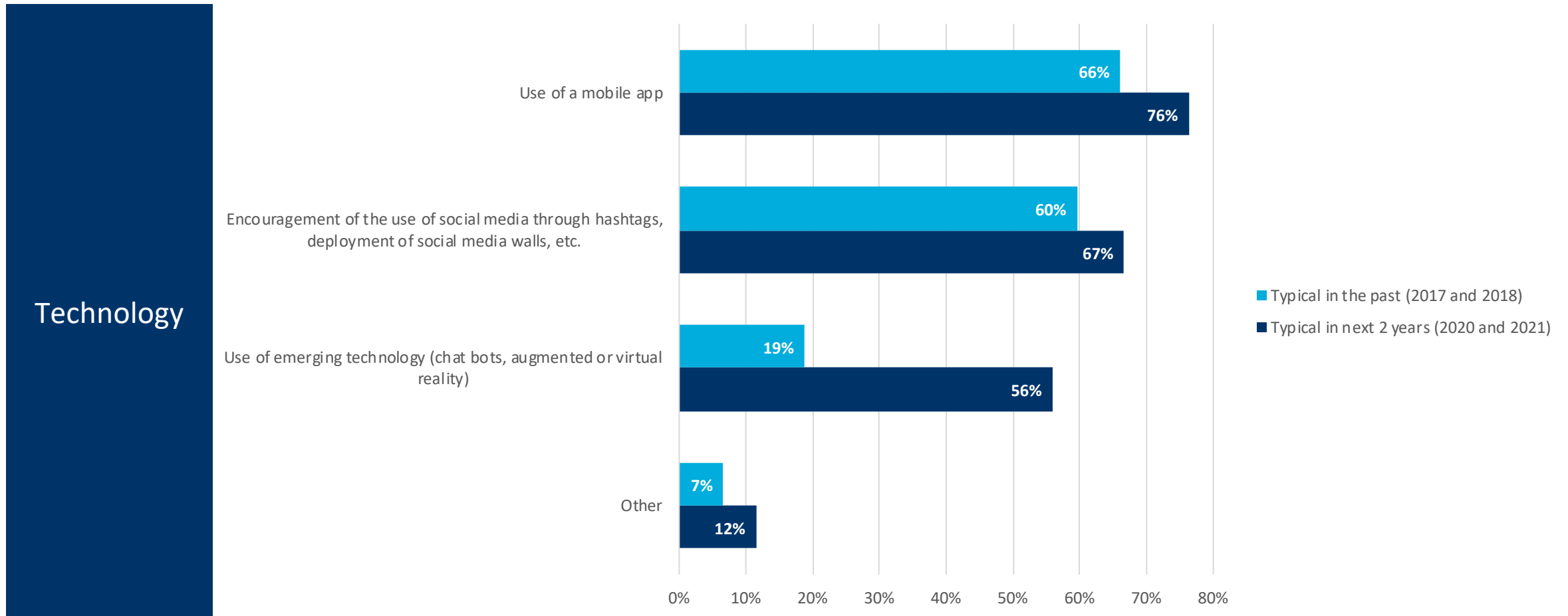
P4. What amount of time on-site will be spent in meetings for programs occurring the next 2 years (2020 and 2021)?



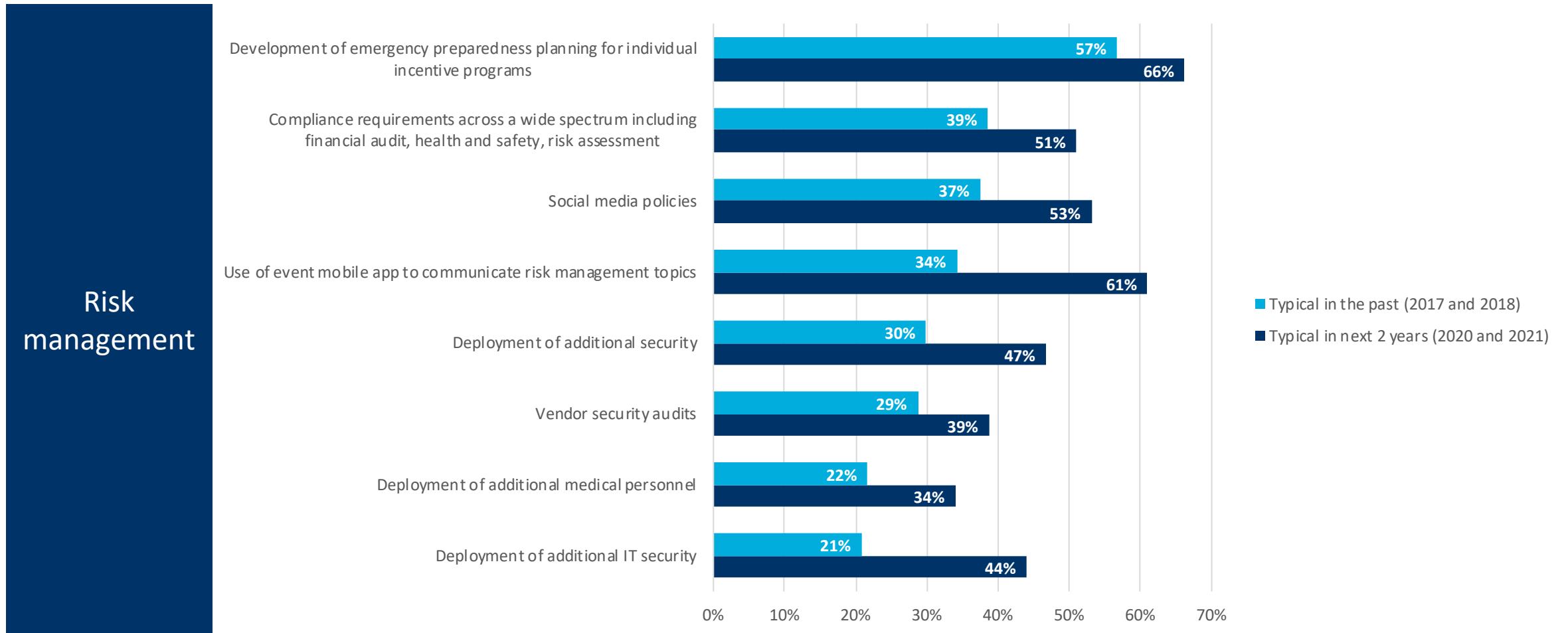
P5. Which program activities and inclusions have been typical in past and current events? What is expected to be typical in future events?



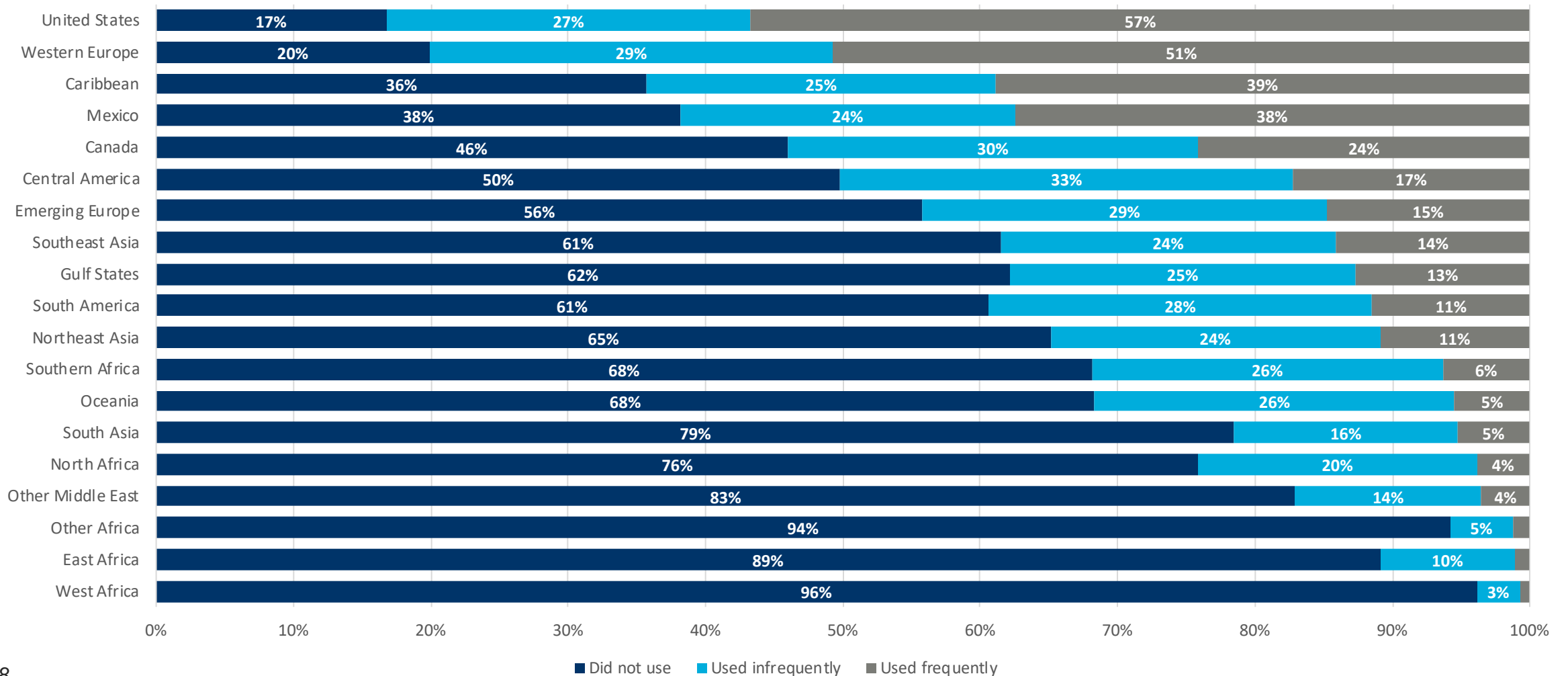
P6. What technology and risk management steps have been typical in past and current events? What is expected to be typical in future events?



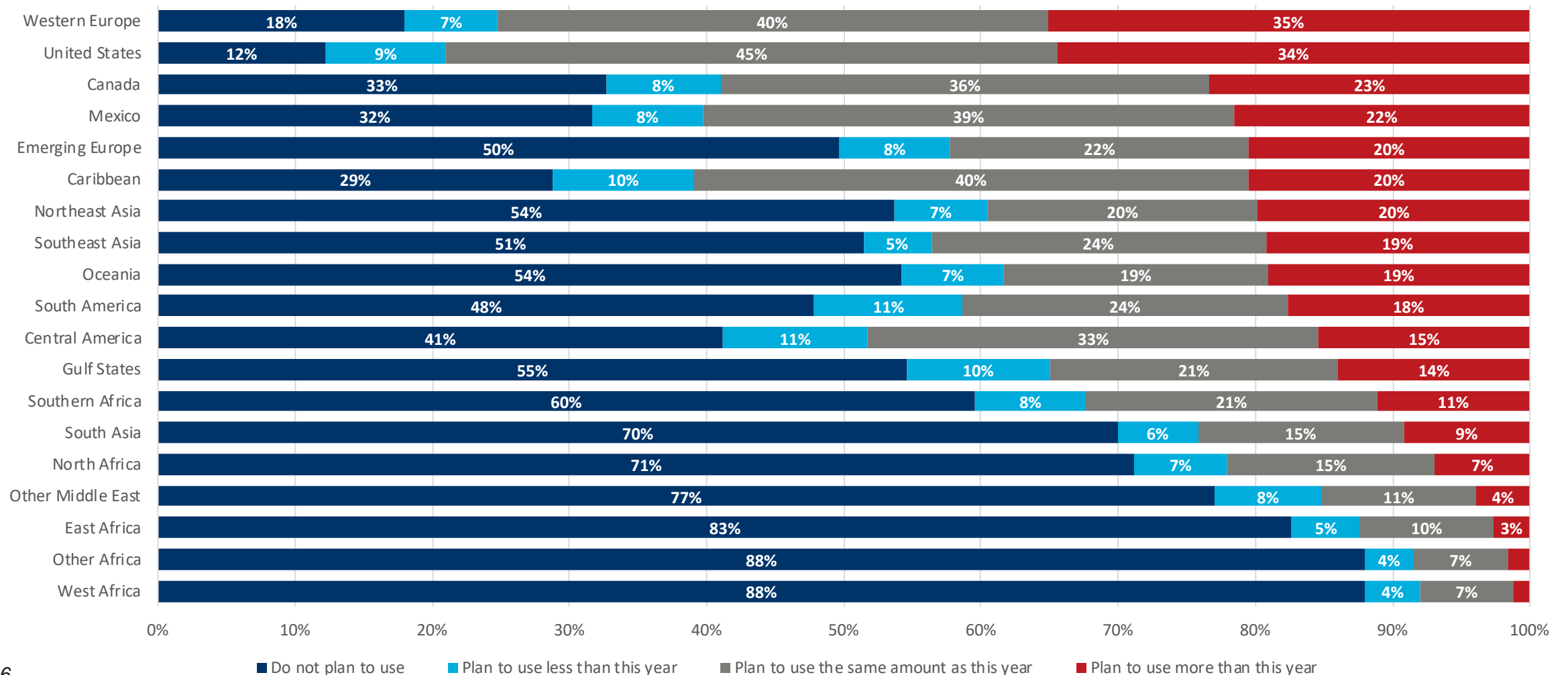
P6. What technology and risk management steps have been typical in past and current events? What is expected to be typical in future events?



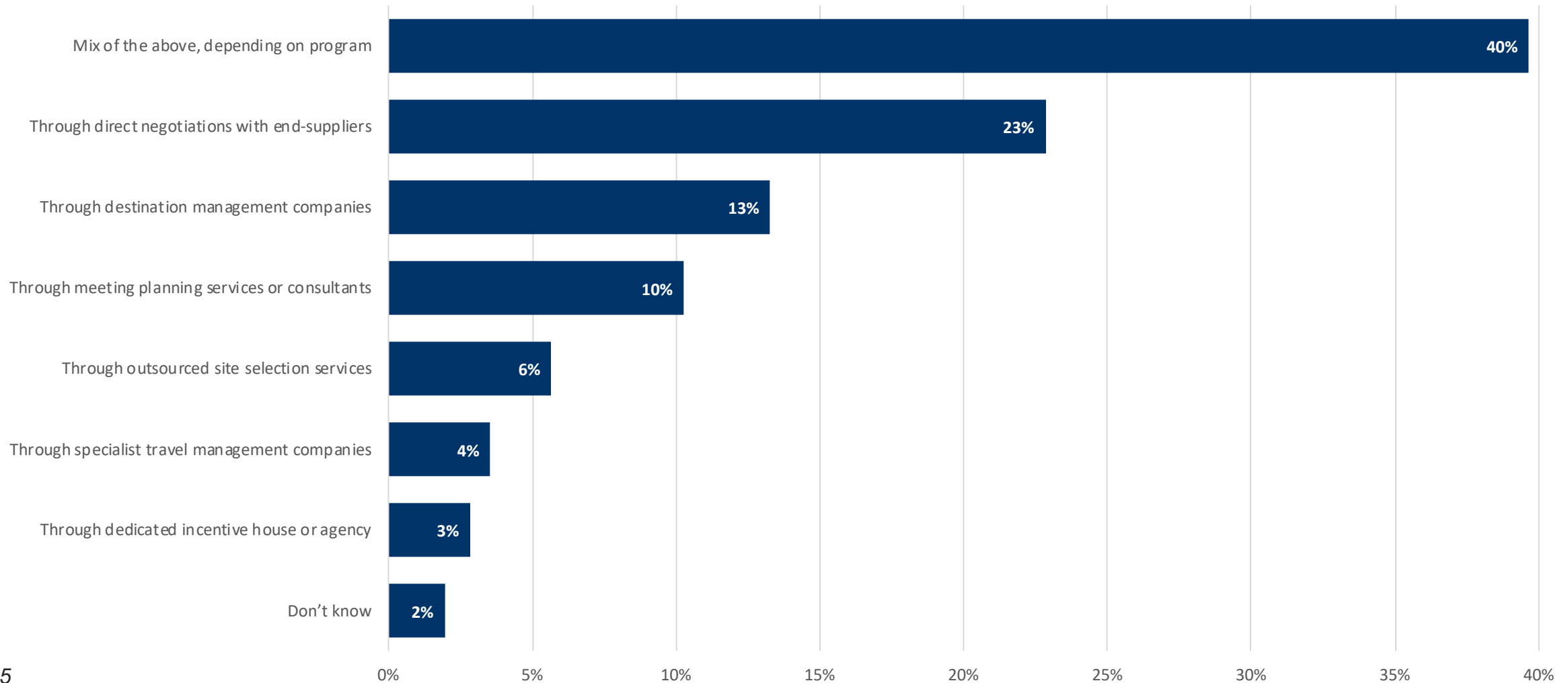
VD1. Which destinations did your team use or plan to use for incentive travel programs that are occurring this year (2019)?



VD2. Which destinations does your team plan to use for incentive travel programs occurring during the next 2 years (2020 and 2021), and how does that use compare to this year (2019)?

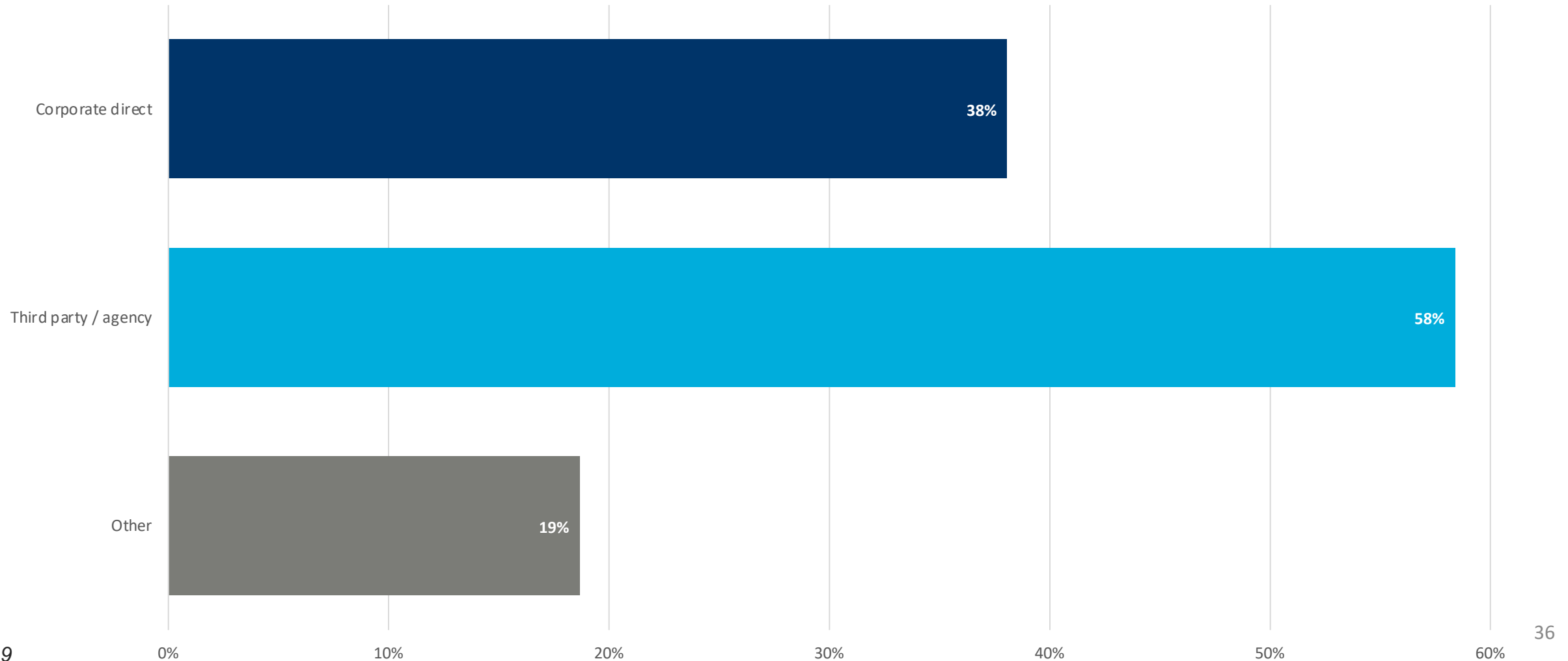


VD3. How is your team contracting for, or planning to contract for, incentive travel programs occurring over the next 2 years (2020 and 2021)?





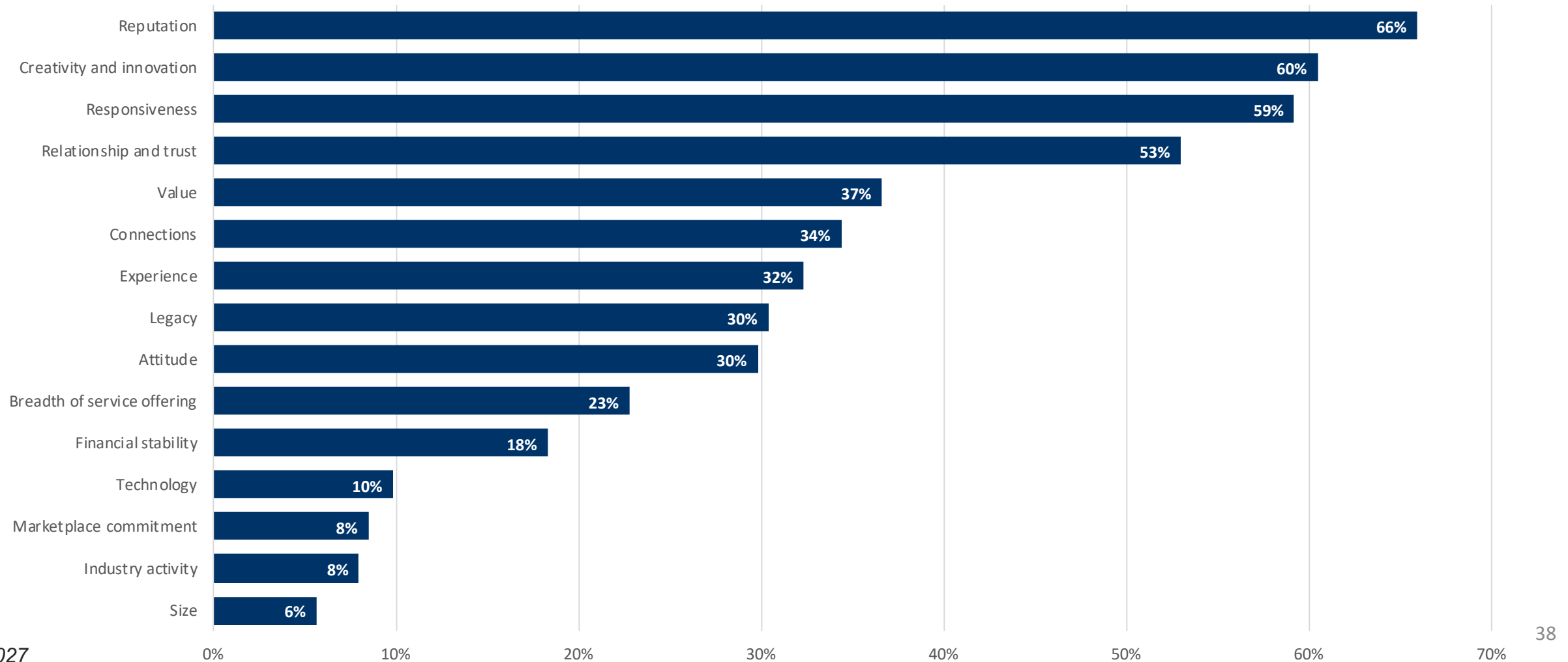
VD4. For programs occurring during the next 2 years (2020 and 2021), what share of your team's business is generated by each type of client?



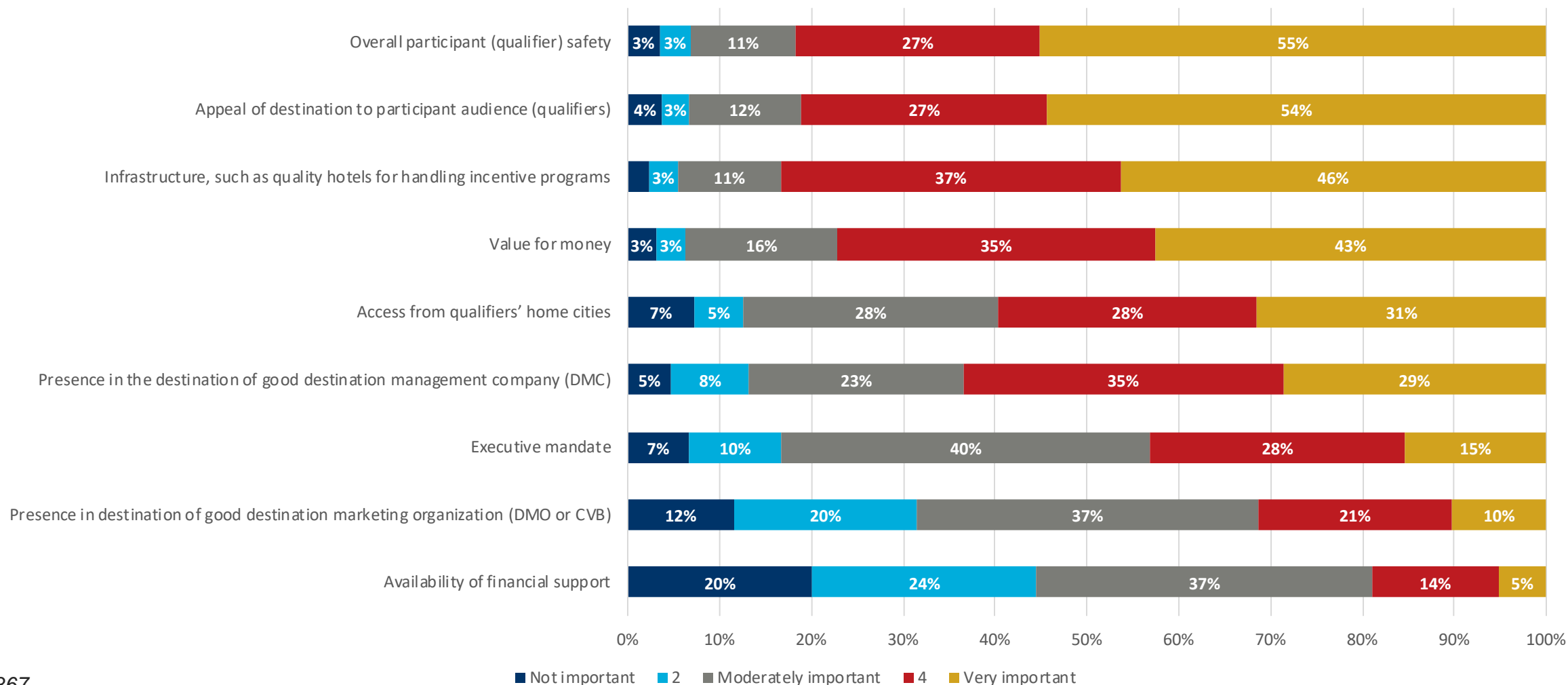
VD5. Considering the origin of RFPs for the next 2 years (2020 and 2021), please indicate which sources are most important for your team (e.g., by number and quality of leads). *Select up to 3.*



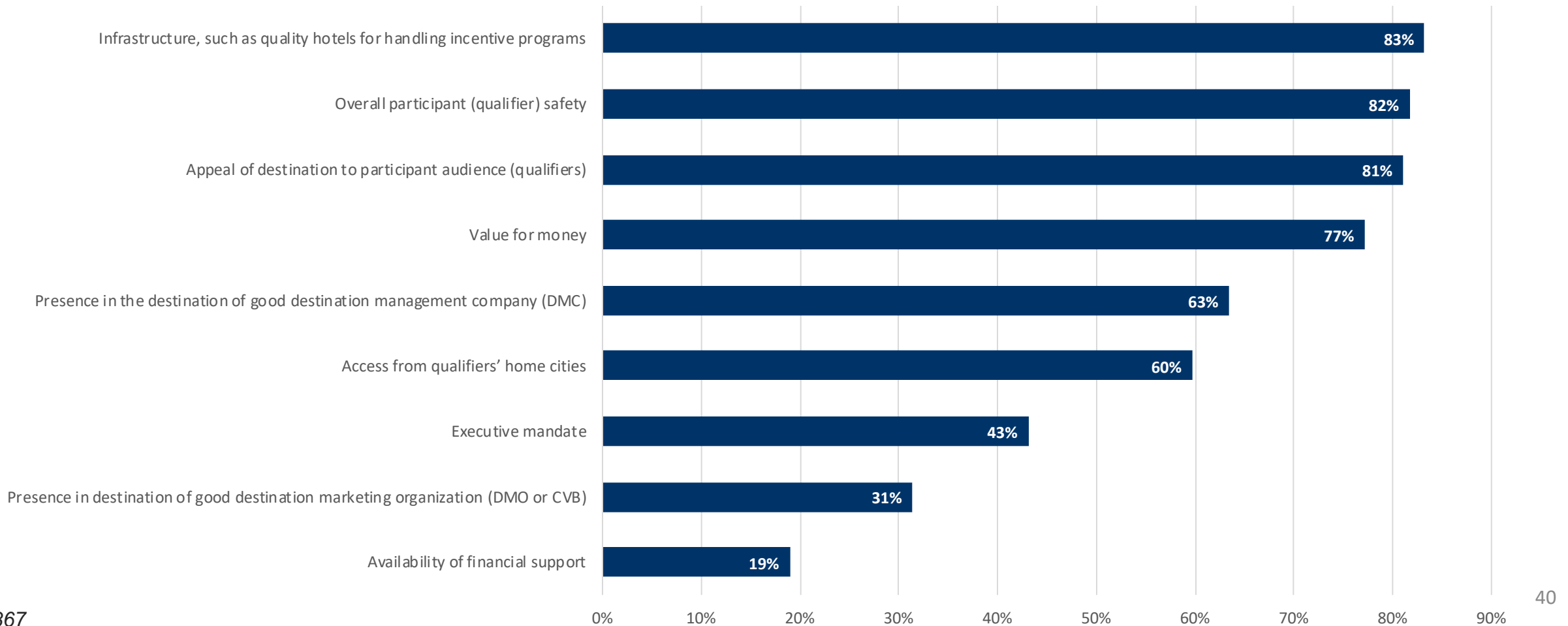
VD6. What do your clients identify as the key factors that influence their choice of partner-suppliers, such as incentive houses, DMCs or other agencies? *Select up to 5.*



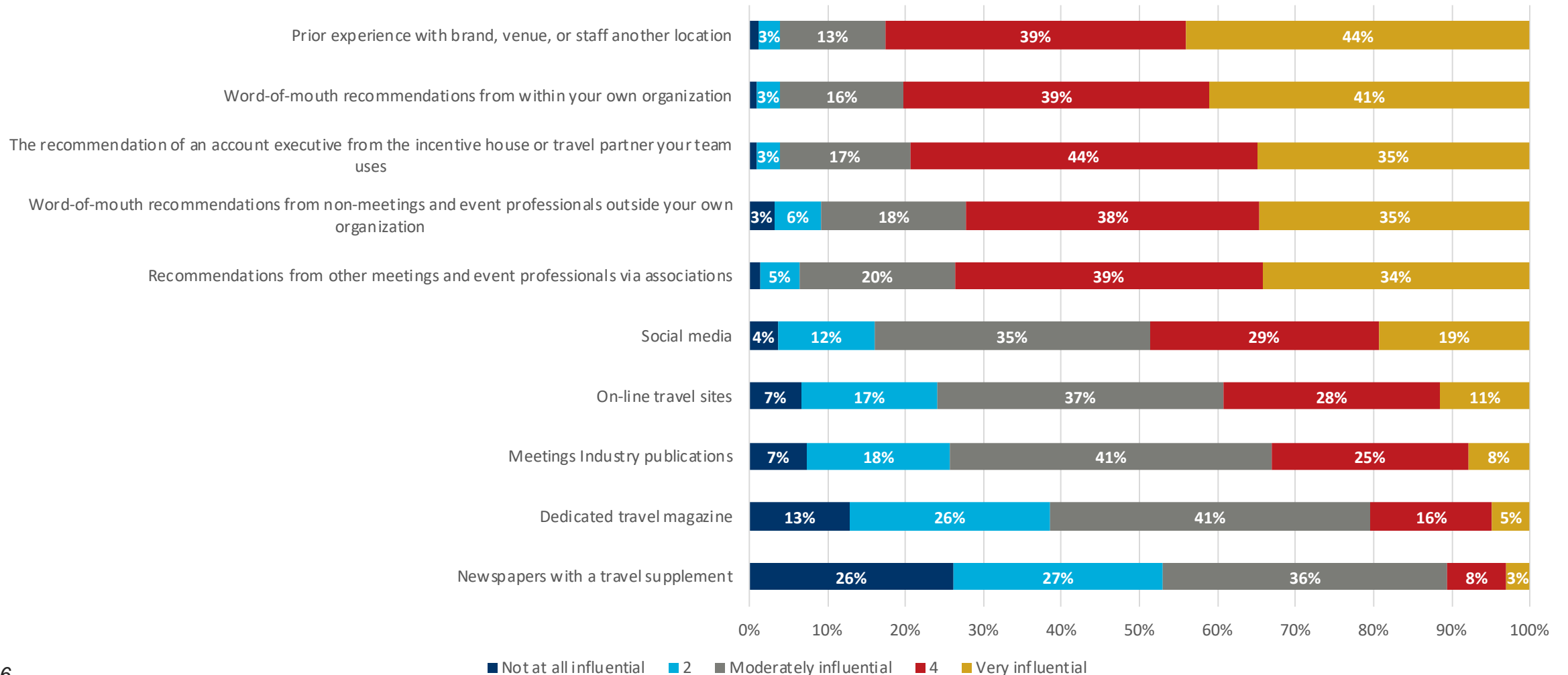
VD7. What are the most important considerations in selecting a destination for incentive travel programs? Please answer based on your experience with these programs.



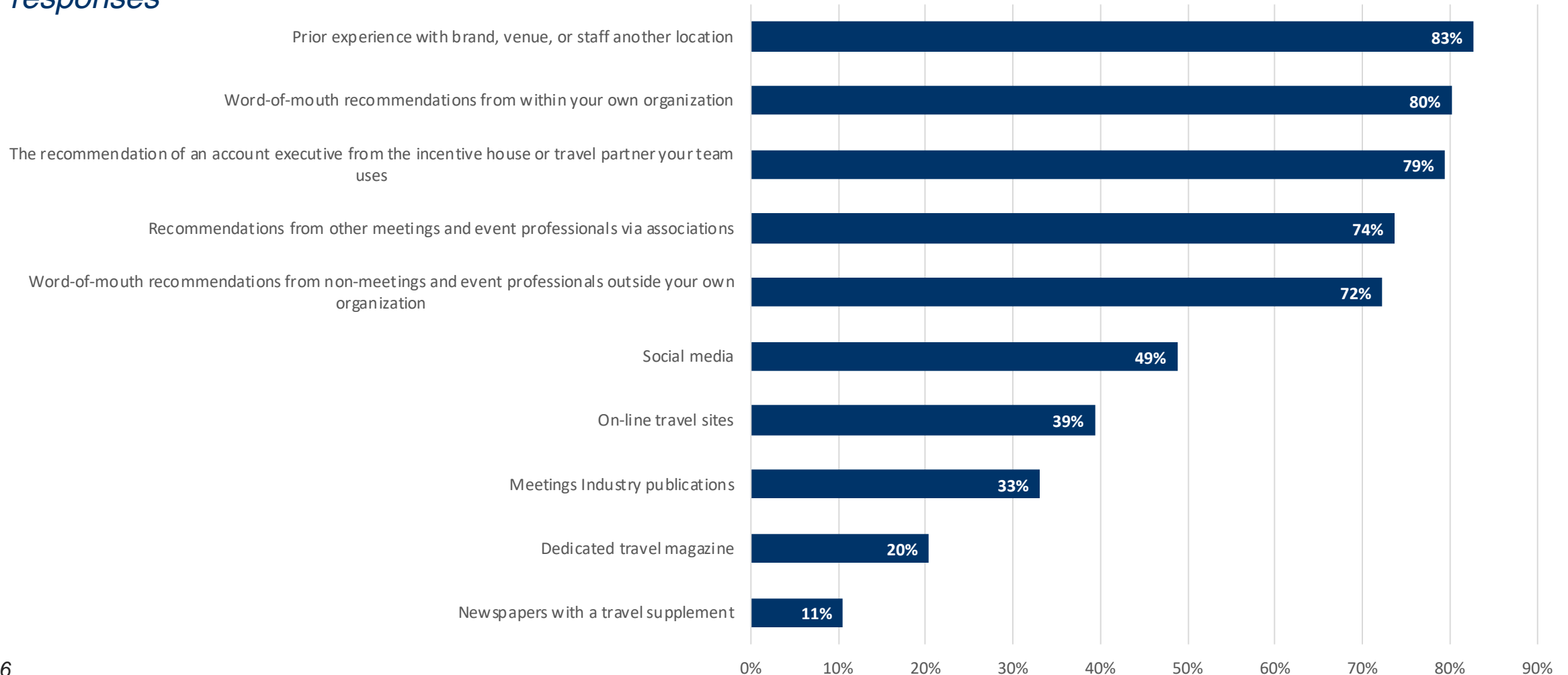
VD7. What are the most important considerations in selecting a destination for incentive travel programs? Please answer based on your experience with these programs. “Very important” and “Important” responses



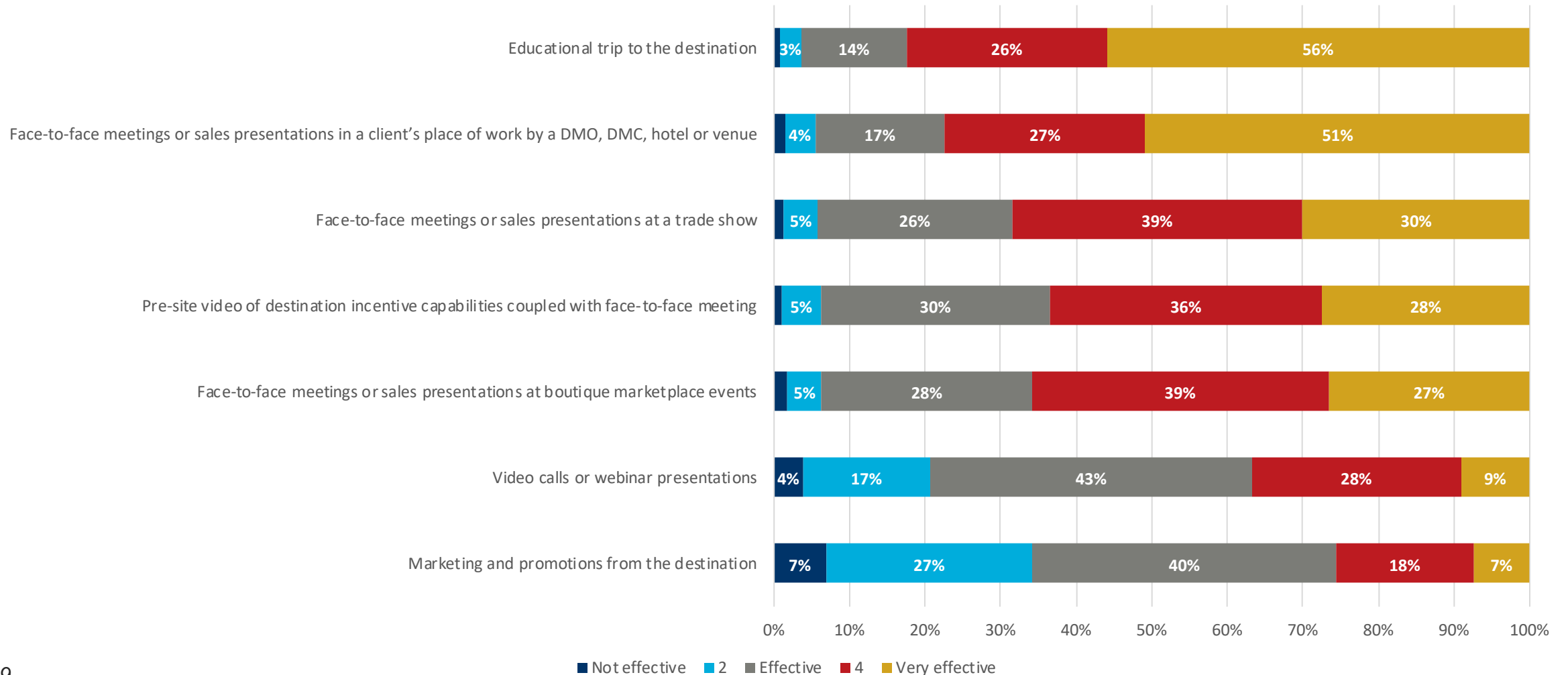
VD8. Based on conversations with your clients, when they are selecting a new destination for an incentive travel experience, how influential are the following factors?



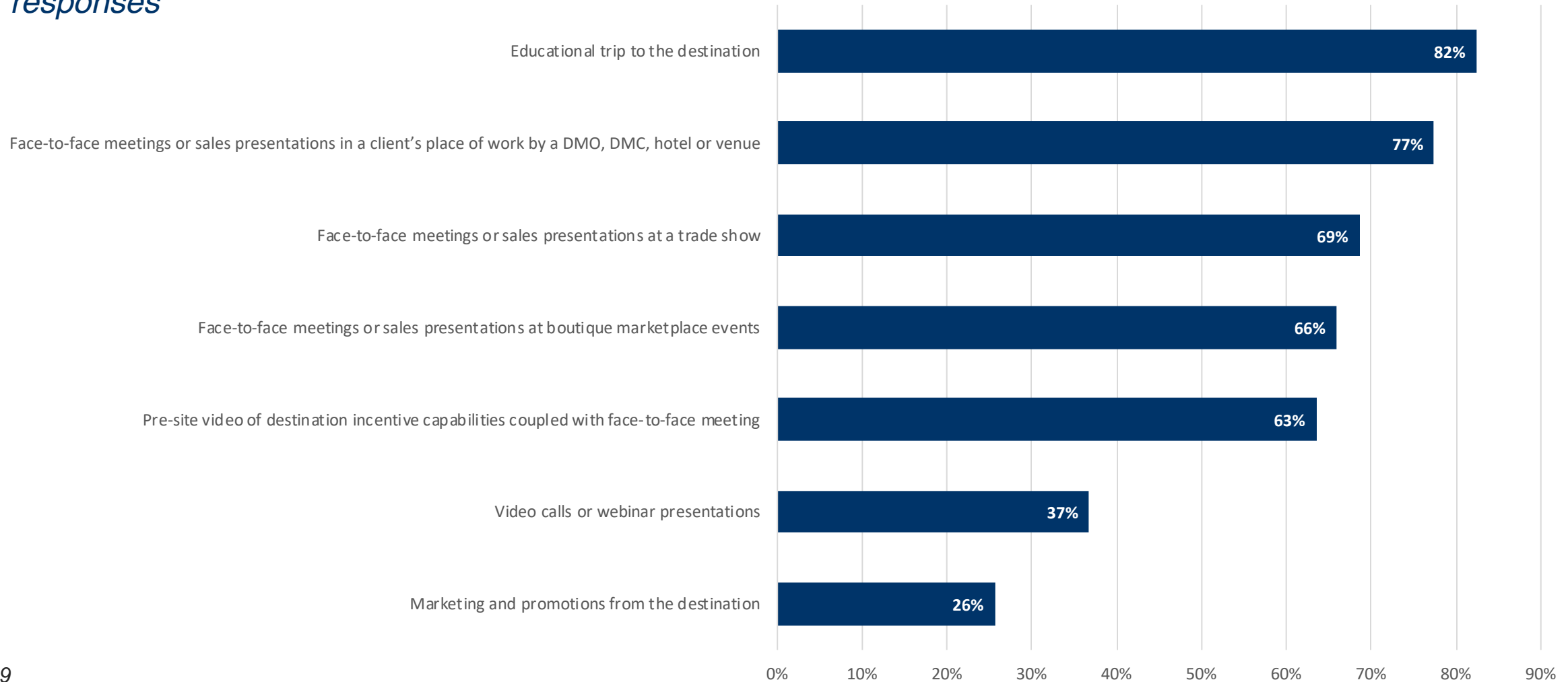
VD8. Based on conversations with your clients, when they are selecting a new destination for an incentive travel experience, how influential are the following factors? “Very influential” and “Influential” responses



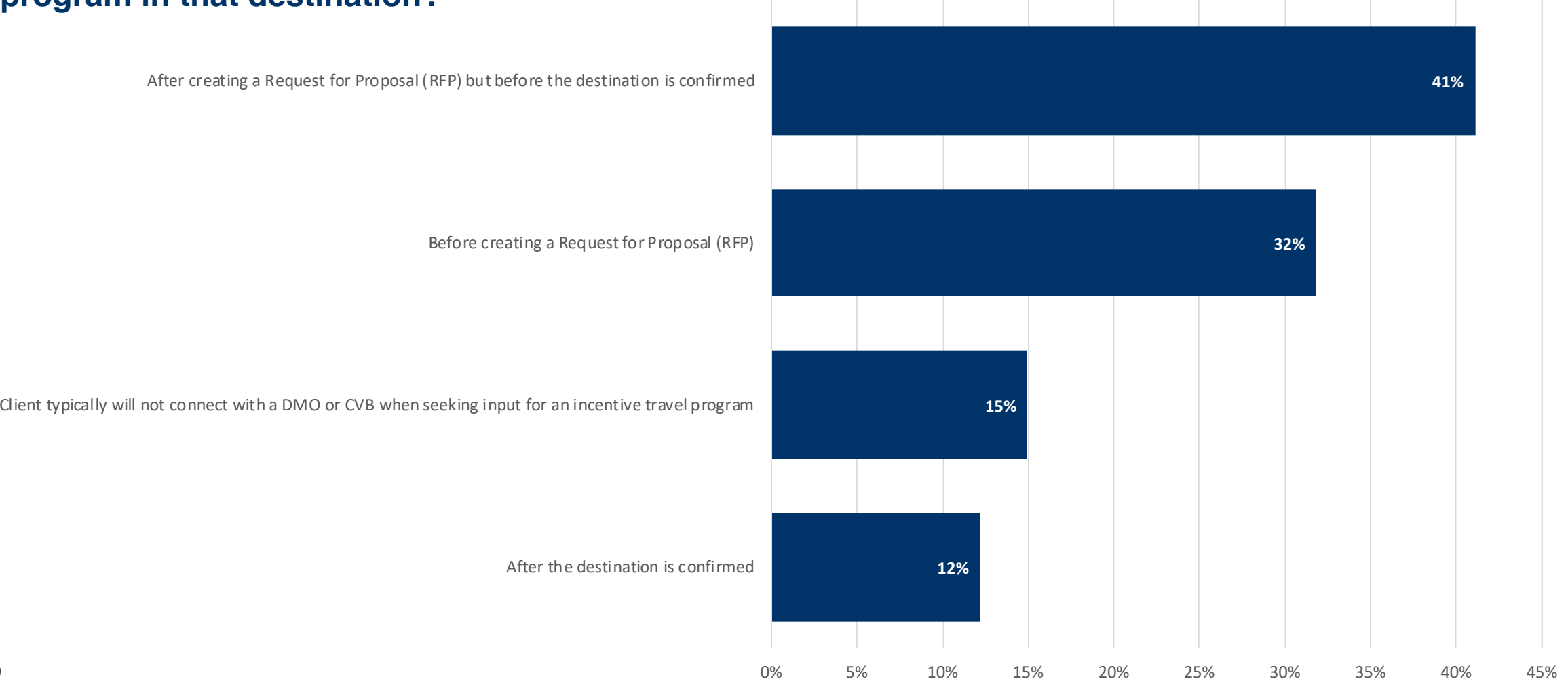
VD9. Based on conversations with your clients, when they are learning about new destinations for incentive travel, how effective are the following outreach methods?



VD9. Based on conversations with your clients, when they are learning about new destinations for incentive travel, how effective are the following outreach methods? “Very effective” and “Effective” responses



VD10. Based on your experience, at what stage does an incentive travel program organizer typically approach a destination marketing organization (DMO or CVB) to seek advice about operating a program in that destination?



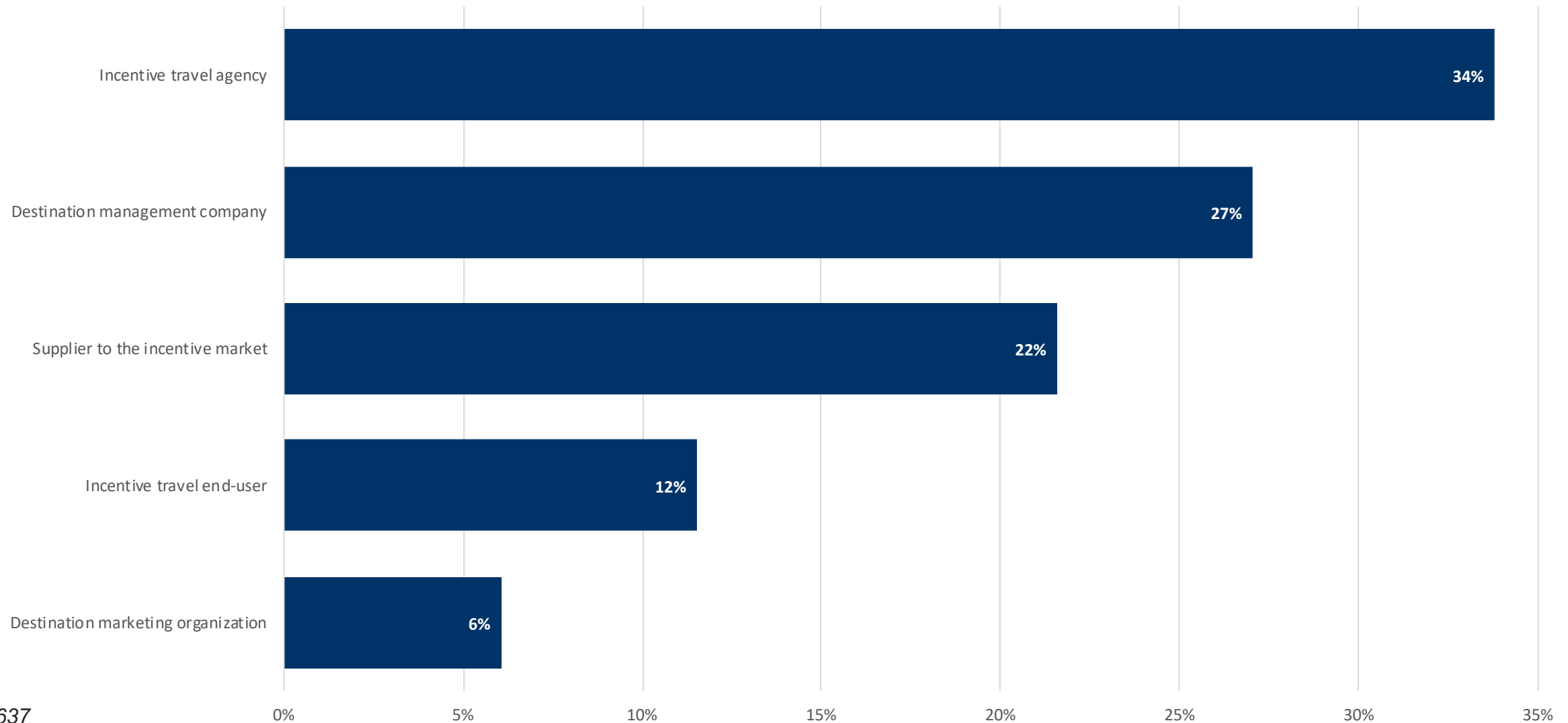
Survey demographics



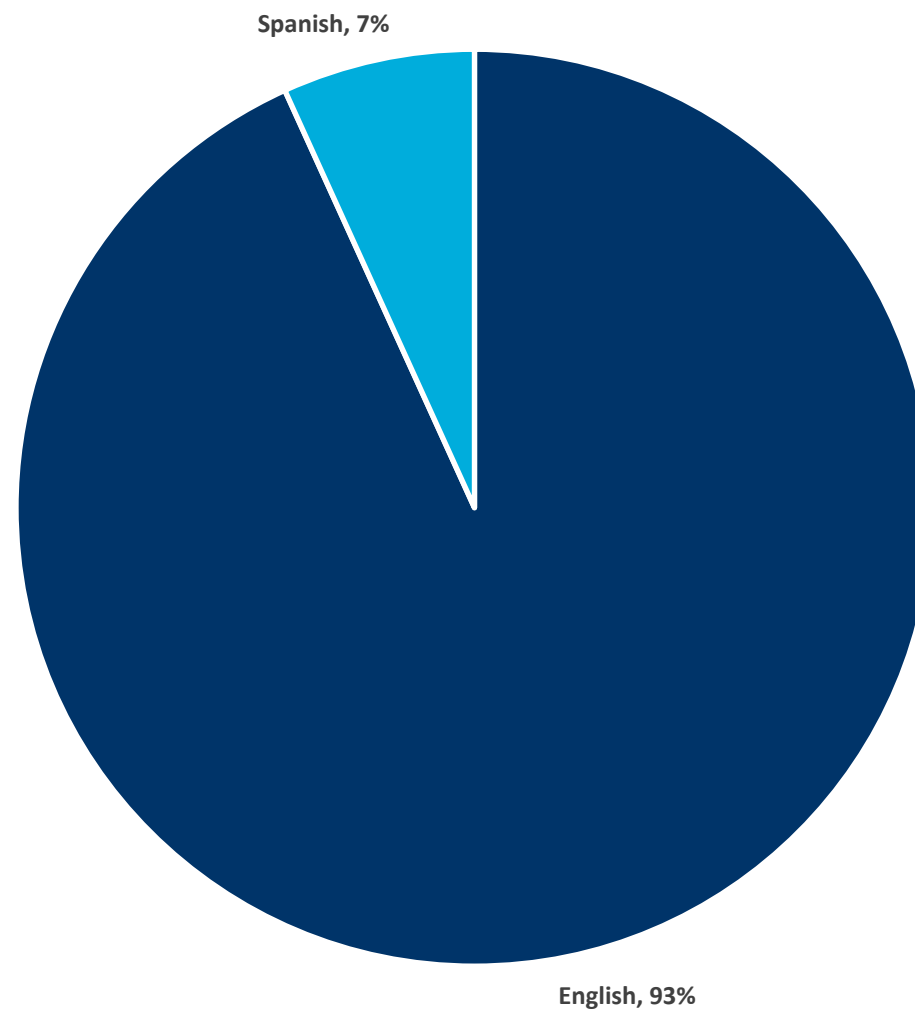
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I1. Please select the role that best describes your involvement in incentive travel

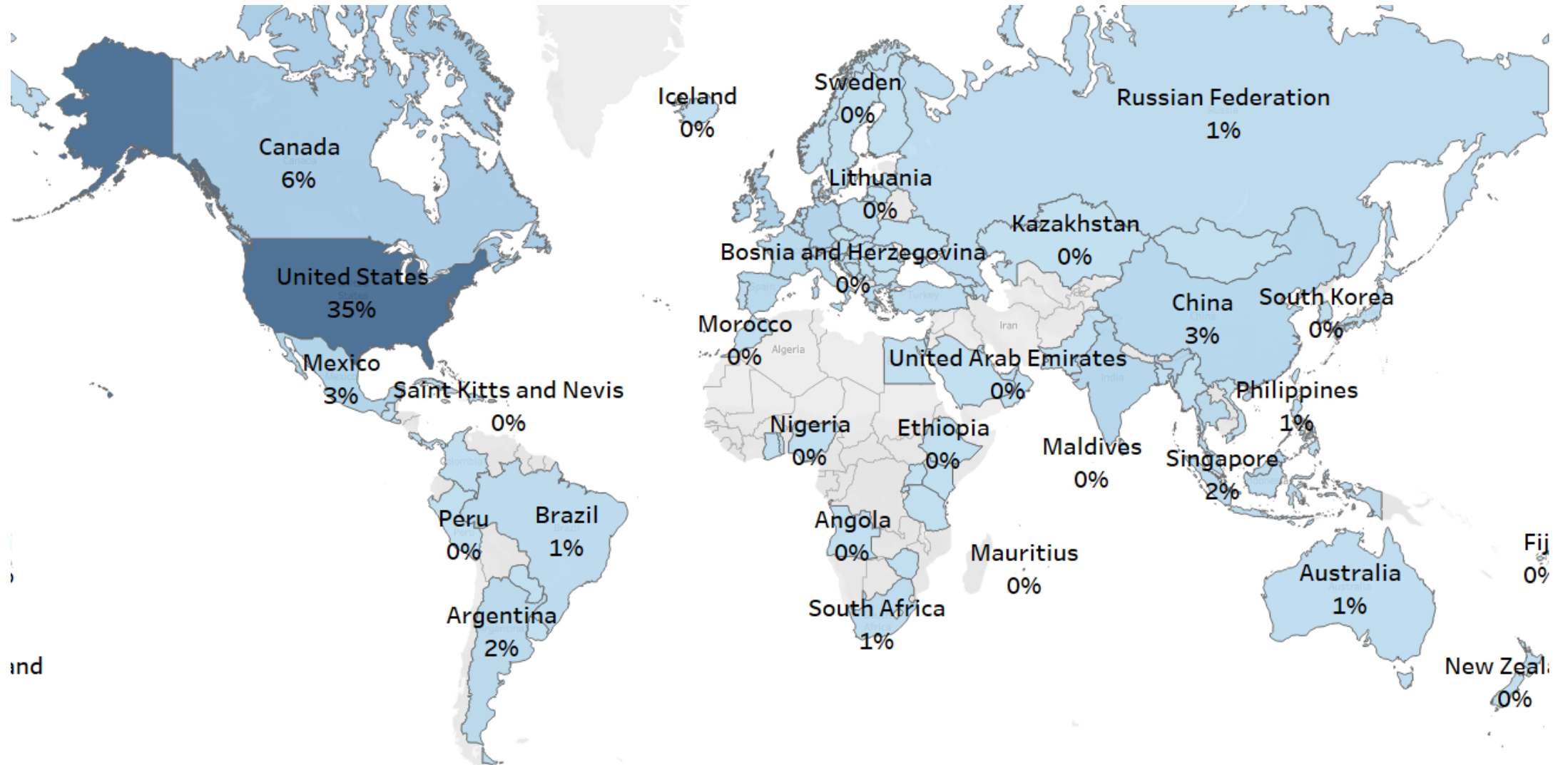


I2. In what language would you like to take the survey?



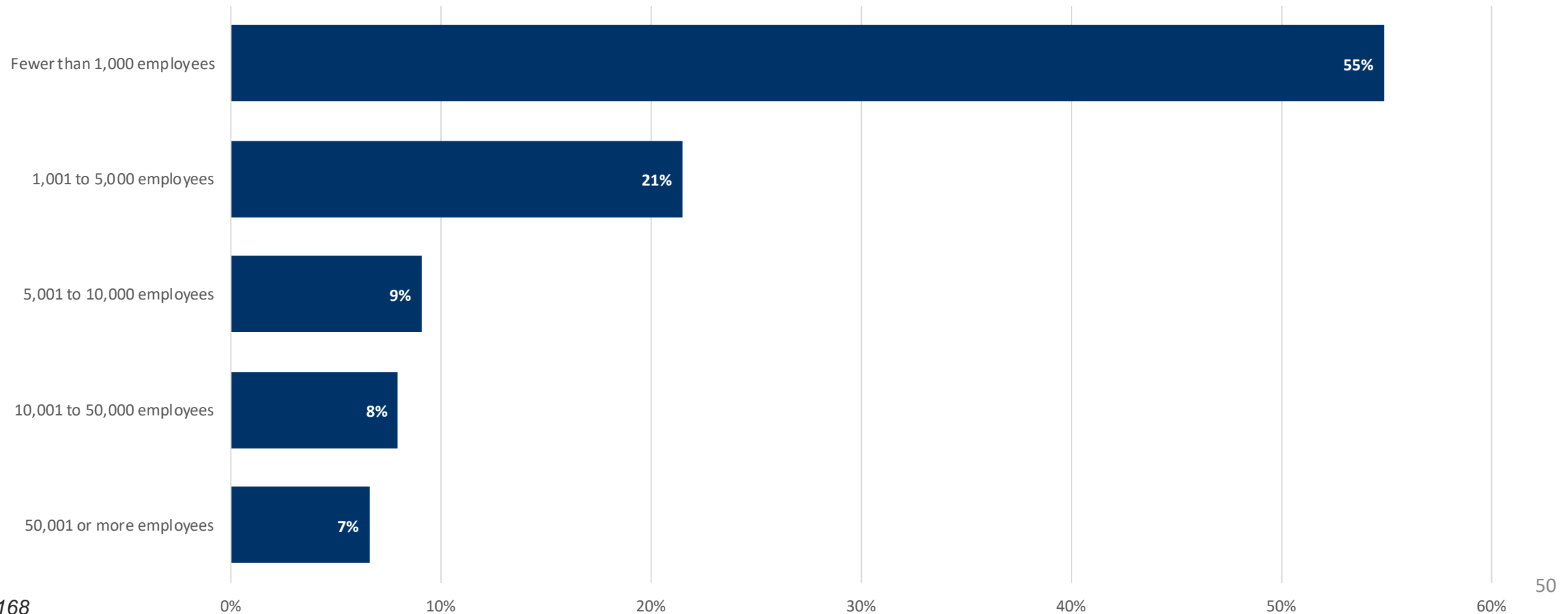


I3. In which country is the organization for which you work based?



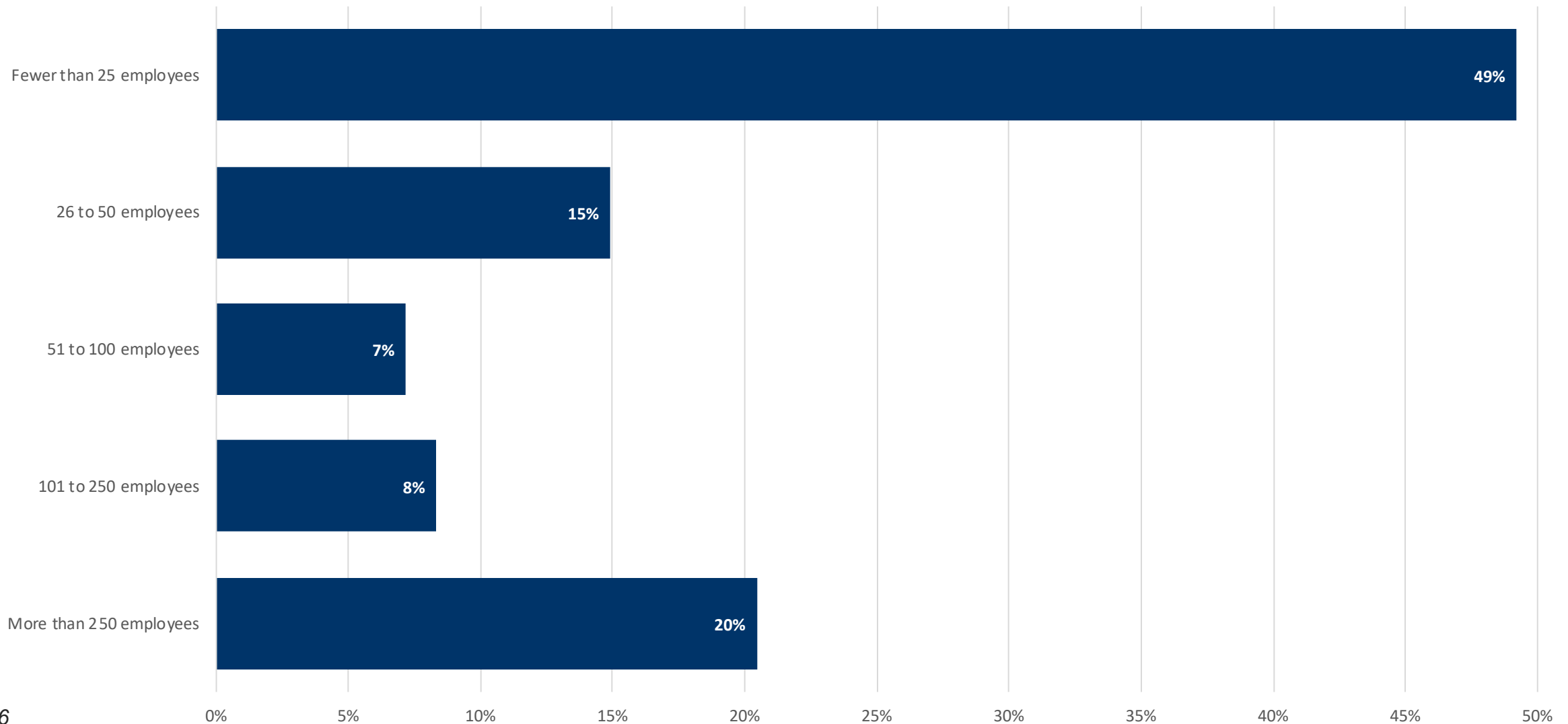


I4. Which of the following best describes the size of the company for which your team is organizing incentive travel programs (i.e., the size of the parent company, all employees)? Incentive travel agencies should answer from the perspective of their typical client companies.

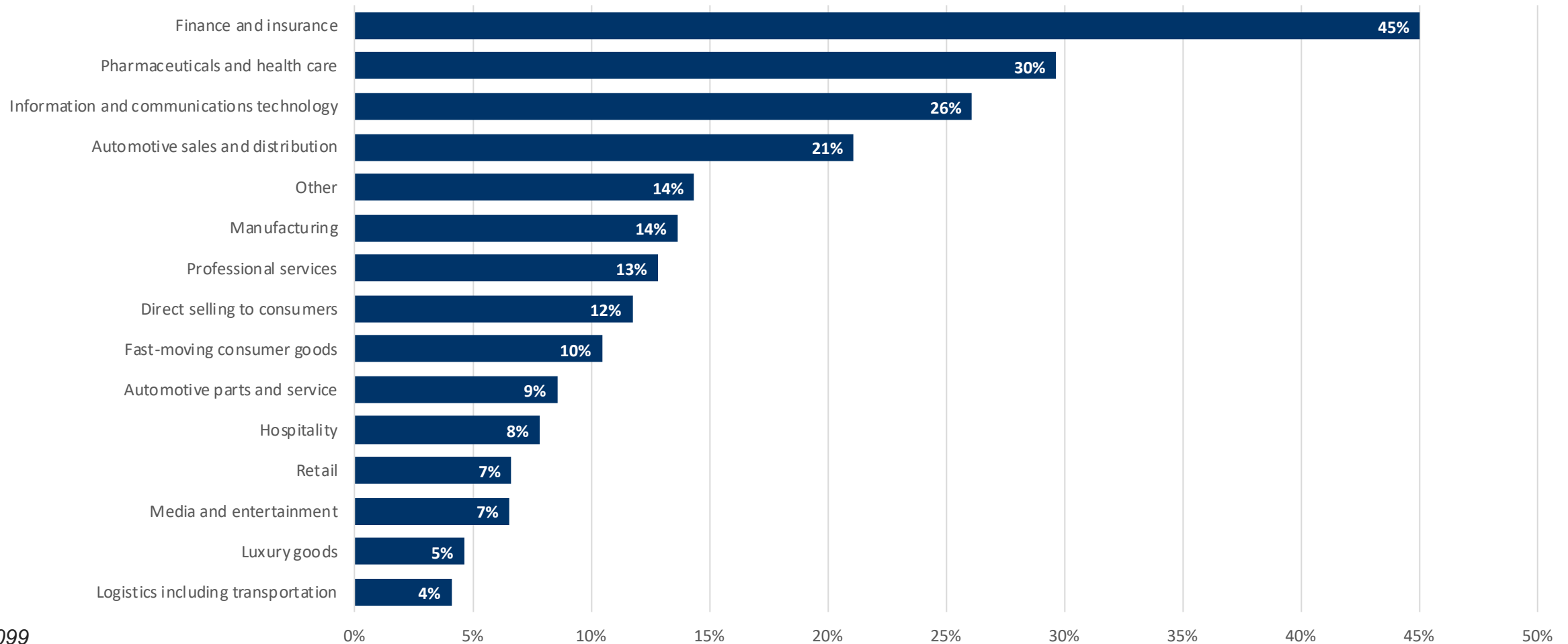




I4a. Which of the following best describes the size of your company?



I5. Which of the following best describes the industry for which your team is organizing incentive travel programs (i.e., the industry of the company or business units using incentive travel)? Incentive travel agencies should indicate the client industry they work with most frequently.





I6. Which of the following best describes the company for which you work?

