

The Impact of Destination Choice on Motivation



June 2021

- While the pandemic put incentive travel largely on hold, all indications are that people are anxious to travel again and that incentive travel is still a motivating award.
- Data from the Incentive Travel Index and the Rewards Preferences study suggest the pandemic may have changed travel preferences, either temporarily or long-term.
- The types of experiences participants prefer have also been impacted, with greater interest in health and wellness, less crowding, and outdoor spaces. Whether this shift in preferences is temporary, or here to stay for a longer term, is not yet known.
- The pandemic accelerated trends that had already begun. For example, offering greater flexibility and personalization is something we already saw rising in prominence that will undoubtedly continue after the pandemic subsides.
- This study is designed to examine both destination preferences and the nature of what incentive travel participants most want relative to features and activities in their programs.
 - While the sample is limited to almost exclusively US residents in origin who work in a sales role, the study lays the foundation for further exploration with other diverse populations.

Key Questions

- Which destinations are the most motivating?
- What features about the award trip are most motivating and important to participants?
- What's changed since the pandemic?
- What features/benefits/activities are people seeking in their incentive travel programs?
- What differences exist between men and women? Those married and/or with children versus those who are single and/or without children?

- 401 respondents, all but five US-based respondents (e.g., one each from Canada, Central America, Western Europe, Southeast Asia, and Northeast Asia)
 - Employed full-time in a sales role
 - Eligible for an incentive travel award sometime within the past three years
 - 18+ years of age
 - Cannot be self-employed, an independent contractor, or a temporary employee
- Panel supplied sample
- Approximately 10-minute survey

Sample Characteristics

Industry	Percent
Retail/Wholesale	22%
Manufacturing/Industrial	13%
Banking/Financial Services/Insurance	12%
IT/Technology	9%
Professional Services	7%
Automotive	6%
Entertainment/Media	5%
Health and Medicine	5%
Hospitality/Travel/Leisure	4%
Education	4%
Pharmaceutical	3%
Other	12%

Sample Characteristics

Gender	Percent
Male	54%
Female	46%

Marital Status	Percent
Married	64%
Single	18%
Living with a partner	9%
Divorced/Separated	8%
Widowed	2%

Sample Characteristics

Children Living in Household	Percent
Have children under 5 living at home	20%
Have children between 5-11 living at home	24%
Have children between 12-18 living at home	24%
Have children over the age of 18 living at home	9%
Have no children living at home	44%



Overall Appeal of Incentive Travel



Key Findings

- Overall, group incentive travel awards are considered 'very' or 'extremely' motivating by 80% of the respondents in the study.
 - Only 2% find no motivational value in group travel.
- While both genders find group incentive travel highly motivating, males are slightly more enthusiastic with 54% calling group incentive travel 'extremely' motivating compared to only 42% of females.
- Those who are either married or living with a domestic partner find group incentive travel more motivating than those who are currently single.
- Similarly, those with children under the age of 18 living at home find group travel much more motivating than those without children living at home.
- Individual incentive travel awards also received high ratings for motivational appeal. Eighty four percent (84%) say individual travel awards are 'very' or 'extremely' motivating, with only 1% saying individual travel opportunities do not motivate them.
- Over half of both men and women find individual travel experiences to be 'extremely' motivating.

Key Findings (continued)

- While both married and single participants value individual travel awards equally, those with children under 18 at home feel most positively about individual travel experiences.
- Overall, three out of four (75%) say incentive travel experiences have a great deal of value for them.
- Like some of the previous findings, males, those who are married, and those with children under 18 living at home, all find the most value in incentive travel experiences.

Overall Appeal of Incentive Travel

Assuming a group travel experience was designed and planned to a destination to which you'd find appealing, how motivating of a reward is an opportunity for a group travel experience?

Motivational Impact	Overall	Males	Females
Extremely motivating	48%	54%	42%
Very motivating	32%	27%	38%
Somewhat motivating	19%	19%	18%
Not motivating at all	2%	1%	2%

Overall Appeal of Incentive Travel

Assuming a group travel experience was designed and planned to a destination to which you'd find appealing, how motivating of a reward is an opportunity for a group travel experience?

Motivational Impact	Currently Single	Married or with a Partner	Kids under 18 at home	No kids under 18 at home
Extremely motivating	43%	50%	60%	36%
Very motivating	28%	33%	26%	38%
Somewhat motivating	26%	16%	12%	24%
Not motivating at all	3%	1%	1%	3%

Overall Appeal of Incentive Travel

Assuming a group travel experience was designed and planned to a destination to which you'd find appealing, how motivating of a reward is an opportunity for an individual travel experience?

Motivational Impact	Overall	Males	Females
Extremely motivating	53%	55%	51%
Very motivating	31%	31%	32%
Somewhat motivating	14%	13%	15%
Not motivating at all	1%	1%	2%

Overall Appeal of Incentive Travel

Assuming a group travel experience was designed and planned to a destination to which you'd find appealing, how motivating of a reward is an opportunity for an individual travel experience?

Motivational Impact	Currently Single	Married or with a Partner	Kids under 18 at home	No kids under 18 at home
Extremely motivating	52%	54%	60%	46%
Very motivating	32%	31%	25%	38%
Somewhat motivating	15%	14%	13%	15%
Not motivating at all	2%	1%	1%	2%

Overall Appeal of Incentive Travel

Do you see an incentive travel award to an appealing destination as having a great deal of value, some value, or little or no value to you?

Value of Incentive Travel	Overall	Males	Females
A great deal of value	75%	78%	72%
Some value	24%	21%	26%
Little or no value	1%	1%	2%

Overall Appeal of Incentive Travel

Do you see an incentive travel award to an appealing destination as having a great deal of value, some value, or little or no value to you?

Value of Incentive Travel	Currently Single	Married or with a Partner	Kids under 18 at home	No kids under 18 at home
A great deal of value	69%	78%	80%	71%
Some value	28%	22%	19%	28%
Little or no value	3%	0%	1%	1%



Priorities and Drivers of Positive Incentive Trip Experiences



Key Findings

- Based on the prioritization exercise, the three most important aspects of creating a highly desirable incentive trip are (1) being able to invite a spouse/significant other/friend along; (2) going to an appealing destination; and (3) having additional expenses covered either by an all-inclusive package or additional spending money.
- For the most part, the rankings were consistent. There were no significant gender differences on priority rankings, and the only significant difference between marrieds and singles was the desire to bring a spouse.
 - Those with children under 18 living at home did, however, show several different priorities than those without children.
 - Although the order of priorities did not shift dramatically, it was more important for those with children under 18 at home to have both health and wellness and community service activities as part of their experience.
 - Having an appealing destination, being able to bring your spouse/significant other along, and having all expenses covered was especially important to those without children in the home.

- When asked to rate the importance of various aspects of the incentive travel experience, the data showed similar results to the prioritization exercise.
 - Easily the most important attribute of an incentive travel experience is being able to take your spouse/significant other/friend along.
 - Having expenses covered, going to a destination to which you've never been before, and having luxury accommodations were also ranked as highly important, mirroring the prioritization exercise.
 - Cvent data indicates the percentage who include luxury accommodations in their events has grown since last year, mirroring the high priority placed on this facet of the experience.
 - In 2019, 75% of all incentive RFPs included at least one Luxury Hotel in the hotels to which it was sourced. In 2021 YTD, that number has increased to 87%.

Priorities and Drivers of Positive Incentive Trip Experiences (continued)

Thinking about things that make an incentive travel experience a highly desirable award for achieving your target performance goals, please rank the following from '1' to '10' with '1' being the most important and '10' being least important

Area	% Ranked #1	% Ranked Top Three	% Ranked Bottom Three	Average Ranking
You can bring a spouse/significant other/friend.	22%	57%	15%	3.93
The trip is to a destination you really find appealing.	20%	49%	16%	4.16
All expenses are covered at all-inclusive or with spending money.	19%	53%	19%	4.26
The trip offers 5-star luxury accommodations and experiences (e.g., hotels, dining, etc.)	11%	41%	18%	4.63
There are some great activities planned that you really enjoy.	6%	22%	25%	5.58
The length of trip is most appropriate for your personal situation.	8%	21%	31%	5.80

Priorities and Drivers of Positive Incentive Trip Experiences (continued)

Area	% Ranked #1	% Ranked Top Three	% Ranked Bottom Three	Average Ranking
There are opportunities for excursions and sightseeing.	3%	18%	29%	5.87
There is an opportunity to interact with the locals and experience the true authentic culture.	5%	16%	38%	6.42
There are significant opportunities for health and wellness opportunities.	4%	12%	51%	7.00
There is an opportunity to participate in a community service project as part of the overall experience.	4%	12%	58%	7.35

Priorities and Drivers of Positive Incentive Trip Experiences (continued)

If you were awarded an incentive award trip, how important would it be to you that...?

Area	% Extremely Important	'Somewhat' or 'Extremely' Important	'Somewhat unimportant' or 'Not important at all'	Net
You could take your spouse/significant other/friend along.	60%	87%	7%	+80%
You are provided a bit of spending money to cover 'extras' or out-of-pocket expenses.	42%	82%	6%	+76%
The trip offers luxury accommodations and experiences.	43%	82%	8%	+74%
The trip was to a destination to which you had never been before.	28%	77%	7%	+70%
The trip provides a more intimate and exclusive experience even if it means fewer winners.	27%	71%	9%	+62%

Priorities and Drivers of Positive Incentive Trip Experiences (continued)

If you were awarded an incentive award trip, how important would it be to you that...?

Area	% Extremely Important	'Somewhat' or 'Extremely' Important	'Somewhat unimportant' or 'Not important at all'	Net
Your seat is upgraded to a seat better than economy	29%	70%	11%	+59%
You have the opportunity for significant professional networking.	18%	56%	9%	+47%
You receive a merchandise gift as part of the experience.	26%	61%	16%	+45%
You have the opportunity to be recognized in front of your peers.	16%	46%	31%	+15%

Key Findings

- In terms of prioritization, the four top destination experiences are (1) beach/sunshine; (2) adventure travel; (3) mountains; and (4) historical locations.
- Once again, the prioritized rankings are consistent between the genders, with the exception of females rating wellness/spa experiences as significantly higher in preference than males.
- The data reveal a few differences between those with children under 18 and those without.
 - Those without kids have a higher preference for the beach and primary English-speaking destinations; while those with kids under 18 have a higher preference for cruises and shopping. While the ranking differences are statistically significant, they are not dramatic enough to draw any firm conclusions and may simply reflect the participants sampled in the study.

Key Findings (continued)

- The data show that over half (52%) would most prefer an incentive trip lasting between 6-9 days, with only 27% (one-in-four) preferring something less than six days in duration.
- While Cvent data on duration of the experiences being booked are different than the categories we used in the study, their data validates that trips are being planned for a greater duration than in the past.

Priorities and Drivers of Positive Incentive Trip Experiences (continued)

Beyond geographic location, please rank the following types of destinations/experiences in order of preference with '1' being your most preferred and '12' being your least preferred.

Experience type	% Ranked #1	% Ranked Top Three	% Ranked Bottom Three	Average Ranking
Beach/sunshine	30%	55%	9%	4.11
Adventure travel	8%	32%	15%	5.54
Mountains	11%	32%	16%	5.81
Historical location	7%	29%	16%	5.88
Primarily English-speaking	9%	25%	25%	6.46
Wooded/nature area	5%	22%	23%	6.50
Cultural importance	8%	21%	24%	6.54
Smaller city	4%	15%	26%	7.05
Shopping	4%	18%	31%	7.28

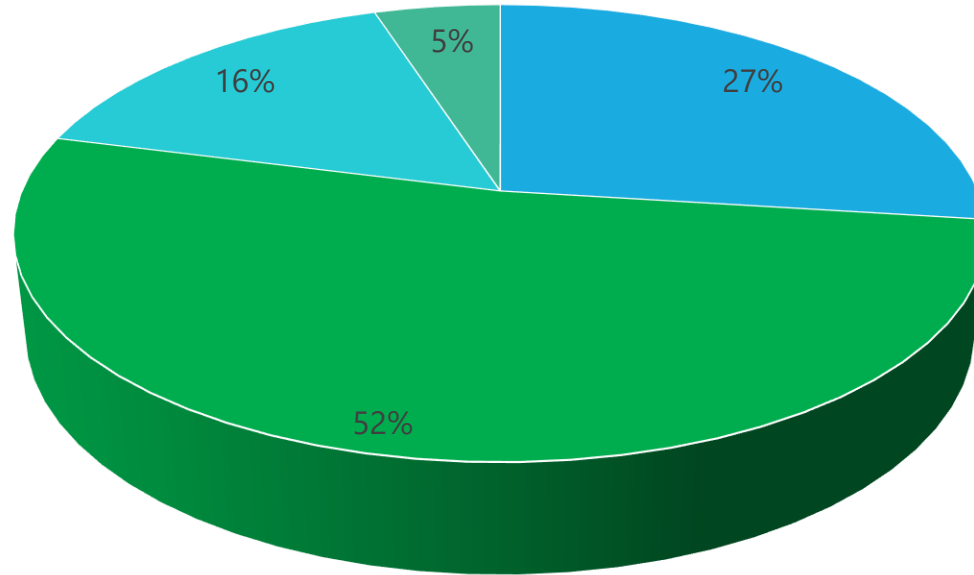


Priorities and Drivers of Positive Incentive Trip Experiences (continued)

Experience type	% Ranked #1	% Ranked Top Three	% Ranked Bottom Three	Average Ranking
Large metropolitan area	5%	17%	35%	7.48
Wellness spa	3%	16%	35%	7.55
Cruise	9%	18%	44%	7.79

More than half (52%) say that 6-9 days is the ideal length of an annual incentive travel award trip

What is the ideal length of an annual incentive travel award trip?



■ 3-5 days ■ 6-9 days ■ 10 days ■ Over 10 days

Event data on the duration of booked trips 2019-2021

The percentage of trips planned for a week or longer has grown each year, now representing 27% of all experiences

	2019	2020	2021
1 - 3 days	26%	22%	16%
4 - 6 days	52%	54%	57%
7 - 13 days	20%	22%	25%
14+ days	2%	3%	2%



Changes Since the Pandemic



- The data show some fairly large shifts in the incentive travel experiences participants want since the pandemic.
 - Nearly two-thirds have increased their interest in...
 - An incentive trip where you stay in a private unit that is part of a larger resort
 - An incentive travel experience that closely follows COVID protocols
 - An individual travel experience where you stay in a private vacation residence with only your spouse/significant other
 - An incentive trip to the mountains or other remote area
 - An incentive trip where you stay at a luxury hotel
 - Over half have increased their interest in...
 - An incentive trip where you stay at an all-inclusive resort
 - An incentive trip to which you can drive

Key Findings (continued)

- Half the participants have decreased their interest in...
 - An incentive trip involving a cruise ship
 - An incentive travel experience involving mingling with large groups of people
- Sentiment regarding taking an incentive trip that involves air travel was more mixed, with 42% having an increased interest in trips by air and 31% having a decreased interest in a trip with air travel.

Changes Since the Pandemic

Since the COVID-19 pandemic, please indicate whether your interest in receiving each of the following as an award gift has significantly increased, somewhat increased, somewhat decreased or significantly decreased.

Area	% 'Significantly' Increased	% Increased (Total)	% 'Significantly' Decreased	% Decreased (Total)	Net
An incentive trip where you stay in a private unit that is part of a larger resort	28%	63%	6%	16%	+47%
An incentive travel experience that closely follows COVID protocols	35%	64%	8%	18%	+46%
An individual travel experience where you stay in a private vacation residence with only your spouse/significant other	30%	61%	7%	16%	+45%
An incentive trip to the mountains or other remote area	28%	61%	5%	16%	+45%

Changes Since the Pandemic (continued)

Area	% 'Significantly' Increased	% Increased (Total)	% 'Significantly' Decreased	% Decreased (Total)	Net
An incentive trip featuring a stay at a luxury hotel	31%	61%	6%	20%	+41%
An incentive trip where you stay at an all-inclusive resort	32%	56%	9%	20%	+36%
An incentive trip to which you can drive	29%	54%	6%	20%	+34%
An incentive travel experience involving a flight	20%	42%	13%	31%	+11%
An incentive trip involving a cruise ship	16%	31%	27%	50%	-19%
An incentive travel experience involving mingling with large groups of people.	12%	28%	28%	53%	-25%



Destination Preferences



Destination Preferences

- Participants were presented with 23 regional options from which to choose their most and least preferred destinations.
- Each person in the study was first asked to identify their three most and least preferred destinations.
- Once selected, participants were then asked to choose their next most preferred and least preferred destinations.
- Destination ranking were evaluated by gender, relationship status, and whether the participant currently has children living at home. While there are a number of statistically significant differences in the rankings, these differences may or may not simply be a reflection of those participating in this study.

Destinations Included in the Study

- Western United States (e.g., California, Las Vegas)
- Southwest United States (e.g., Arizona, New Mexico, Texas)
- Eastern United States (e.g., New York, Maine, Vermont, Massachusetts)
- Southern United States (e.g., Florida, Louisiana)
- Midwest United States (e.g., Chicago)
- Canada (e.g., Ontario, British Columbia, Quebec)
- Hawaii
- Caribbean (incl Puerto Rico)
- Mexico
- Alaska
- Oceania (e.g., Polynesia, Micronesia)
- Central America (e.g., Costa Rica, Panama)
- Western Europe (Germany, France, Italy)
- Middle East (e.g., Dubai, Egypt)
- East Africa (e.g., Kenya, Madagascar)
- North Africa (e.g., Morocco)
- West Africa (e.g., Nigeria, Senegal)
- South Asia (e.g., India, Maldives)
- Southern Africa
- Emerging Europe (e.g., Hungary, Romania)
- South America (Chile, Brazil)
- Southeast Asia (e.g., Singapore, Vietnam)
- Northeast Asia (e.g. Hong Kong, Macau)

Top Ranked Destinations

Destination	Notes
Hawaii	Top ranked destination; tops on everyone's list
Caribbean (incl Puerto Rico)	Preferred most by those without children under 18 at home
Western United States (e.g., California, Las Vegas)	Ranked equally by everyone
Western Europe (Germany, France, Italy)	Preferred most by those without children under 18 at home
Alaska	Preferred most by those without children under 18 at home
Southern United States (e.g., Florida, Louisiana)	Preferred most by females

'Upper Middle' Ranked Destinations

Destination	Notes
Canada (e.g., Ontario, British Columbia, Quebec)	Ranked similarly by all groups
Oceania (e.g., Polynesia, Micronesia)	Preferred by those without children under 18 living at home
Southwest United States (e.g., Arizona, New Mexico, Texas)	Preferred by females
South America (Chile, Brazil)	Preferred by those who are not married or with a domestic partner
Eastern United States (e.g., New York, Maine, Vermont, Massachusetts)	Preferred by those with children under the age of 18 living at home
Central America (e.g., Costa Rica, Panama)	Ranked similarly by all groups

'Lower Middle' Ranked Destinations

Destination	Notes
Southeast Asia (e.g., Singapore, Vietnam)	Ranked similarly by all groups
South Asia (e.g., India, Maldives)	Ranked similarly by all groups
Mexico	Preferred by those with children under 18 living at home
Emerging Europe (e.g., Hungary, Romania)	Ranked similarly by all groups
Northeast Asia (e.g. Hong Kong, Macau)	Preferred by males
North Africa (e.g., Morocco)	Preferred by females

Lowest Ranked Destinations

Destination	Notes
Middle East (e.g., Dubai, Egypt)	Preferred by those with children under 18 living at home
Southern Africa	Ranked similarly by all groups
Midwest United States (e.g., Chicago)	Preferred by those with children under 18 living at home
East Africa (e.g., Kenya, Madagascar)	Preferred by those who are single
West Africa (e.g., Nigeria, Senegal)	Ranked similarly by all groups

Destination Preferences--Ranked

Region	Top 3	Top 7	Bottom 3	Bottom 7	Top/Bottom 3 Net	Top/Bottom 7 Net
Hawaii	47%	74%	3%	9%	44%	65%
Caribbean (incl Puerto Rico)	26%	53%	5%	16%	21%	37%
Western United States (e.g., California, Las Vegas)	39%	57%	12%	20%	27%	37%
Western Europe (Germany, France, Italy)	29%	53%	4%	19%	25%	34%
Alaska	14%	43%	10%	20%	4%	23%
Southern United States (e.g., Florida, Louisiana)	19%	39%	18%	28%	1%	11%
Canada (e.g., Ontario, British Columbia, Quebec)	13%	38%	15%	29%	-2%	9%
Oceania (e.g., Polynesia, Micronesia)	9%	30%	8%	24%	1%	6%
Southwest United States (e.g., Arizona, New Mexico, Texas)	20%	36%	19%	31%	1%	5%
South America (Chile, Brazil)	7%	26%	9%	24%	-2%	2%
Eastern United States (e.g., New York, Maine, Vermont, Massachusetts)	15%	34%	22%	34%	-7%	0%
Central America (e.g., Costa Rica, Panama)	6%	30%	9%	30%	-3%	0%
Southeast Asia (e.g., Singapore, Vietnam)	10%	24%	15%	32%	-5%	-8%
South Asia (e.g., India, Maldives)	7%	20%	9%	30%	-2%	-10%
Mexico	10%	28%	17%	39%	-7%	-11%
Emerging Europe (e.g., Hungary, Romania)	5%	17%	10%	32%	-5%	-15%
Northeast Asia (e.g. Hong Kong, Macau)	4%	18%	13%	34%	-9%	-16%
North Africa (e.g., Morocco)	3%	14%	12%	31%	-9%	-17%
Middle East (e.g., Dubai, Egypt)	9%	24%	21%	45%	-12%	-21%
Southern Africa	2%	9%	8%	32%	-6%	-23%
Midwest United States (e.g., Chicago)	4%	19%	27%	43%	-23%	-24%
East Africa (e.g., Kenya, Madagascar)	3%	10%	19%	47%	-16%	-37%
West Africa (e.g., Nigeria, Senegal)	2%	5%	19%	47%	-17%	-42%

Ideal Destination

- The final question of the study asked participants to name the one destination they would find most motivating as an incentive travel award.
- Hawaii was easily the most mentioned 'ideal' destination with 75 unique mentions.
 - Western Europe got the second highest number of regional mentions with 52.
- A complete list of specific destinations that were mentioned are presented in the following tables in alphabetical order.

Ideal Destination

Region	Specific area if mentioned	# of mentions
Africa (non-specific)		8
Alaska		10
Antarctica		1
Bahamas		4
Bali		2
Bermuda		1
Canada (non-specific)		5
Canada	Ontario	1
Canada	Vancouver	1
Caribbean	Aruba	1
Caribbean	Belize	1
Caribbean (non-specific)		12
Caribbean	Jamaica	1
Caribbean	Puerto Rico	1
Caribbean	Turks and Calicos	2
Central America (non-specific)		1
Central America	Costa Rica	3
Central America	Panama	1
Central Asia	Kazakhstan	1
Central US (non-specific)		1
China		1

Ideal Destination

Region	Specific area if mentioned	# of mentions
East Asia	Japan	7
Eastern US	Appalachian trail	1
Eastern US	New York	1
Emerging Europe	Croatia	1
Emerging Europe	Czech Republic	1
Europe (non-specific)		11
European Union (non-specific)		1
Hawaii (non-specific)		73
Hawaii	Maui	1
Hawaii	Honolulu	1
Ibiza		1
Iceland		1
Mexico	Cabo San Lucas	1
Mexico	Cancun	1
Mexico (non-specific)		7
Middle East	Dubai	11
Middle East	Egypt	3
Middle East (non-specific)		1
Middle East	Israel	1
Northeast Asia (non-specific)		1
Northern Africa	Morocco	3

Ideal Destination

Region	Specific area if mentioned	# of mentions
Oceania	Micronesia	1
Oceania	New Zealand	6
Oceania	Polynesia	1
Oceania	Tahiti	3
Russia		1
South Africa		2
South America	Argentina	1
South America	Straits of Magellan	1
South America	Brazil	7
South America	Guyana	1
South Asia	Maldives	15
South Asia	India	1
South Asia (non-specific)		1
South Asia	South Korea	1
South United States	Florida	5
Southeast Asia	Thailand	2
Southeast Asia	Singapore	3
Southeast Asia	Vietnam	1
Southern United States	Louisiana	1

Ideal Destination

Region	Specific area if mentioned	# of mentions
Southeast Asia	Mount Everest	1
Southeast Asia (non-specific)		1
Southwestern US	Arizona	1
Southwestern US	Texas	1
Spain		3
Western Europe	Italy	8
Western Europe	Ireland	4
Western Europe	Greece	4
Western Europe	France	16
Western Europe	Germany	5
Western Europe	London	3
Western Europe	Monaco	3
Western Europe	England	3
Western Europe	Scotland	1
Western Europe	Switzerland	2
Western Europe	United Kingdom	1
Western Europe (non-specific)		1
Western United States	California	5
Western United States	Colorado	1



Comparing Booking Data to Participant Preferences



Comparing Booking Data to Participant Preferences

- A final aspect of the study is to compare the degree to which participant preferences align with where incentive trips are actually being booked in 2021.
- Cvent provided data on the most popular destinations chosen by incentive trip planners in 2021, along with the destinations that are the biggest 'risers' and 'fallers' from the previous year.
- Specific destinations were recoded into the broader regions used in the participant study.
- The following table shows the most popular regional destinations as reported by Cvent, along with whether participants showed 'high' preference (top quartile), 'upper middle' preference, 'lower middle' preference or 'low' preference (bottom quartile).

- The Cvent data show that, for the most part, there is good alignment between destination demand and participant destination preferences.
 - Hawaii, Florida, and California are all within the 'top' preferred regions and are also seeing enormous RFP activity. If you're interested in any of these, you will (a) likely struggle to find any level of inventory at this point or (b) find costs to be very high.
 - Guanacaste and Scottsdale also have high demand, although these destinations would be considered 'second tier'.
 - Other 'second tier' options such as Canada or the Eastern United States should be considered if budget or availability become an issue.
- The biggest 'miss' between preference and demand seems to be Mexico.
 - Mexico has limited motivational value to program earners, but we're seeing significant RFP activity by program owners.
- The highest 'risers' are Florida and California destinations, both of which have high motivational value, along with Cap Cana, Kailua and Phoenix/Scottsdale, which falls into the 'second tier' of preferences.

Key Findings (continued)

- While the Caribbean remains an appealing region, some specific destinations are falling in demand (e.g., Grand Cayman, Oranjestad, Aruba, and Montego Bay.)
 - It's possible that these destinations have been consistently used so that new Caribbean destinations are being explored.

Most Booked Destinations for 2021

Region	Specific Destinations	Participant Preference
Caribbean	Nassau	High
Caribbean	St. Thomas	High
Caribbean	Grand Cayman	High
Caribbean	Punta Cana	High
Central America	Guanacaste	Upper Middle
Hawaii	Maui	High
Hawaii	Kohala Coast	High
Hawaii	Honolulu	High
Hawaii	Hawaii	High
Hawaii	Wailea	High
Mexico	Playa del Carmen	Lower Middle
Mexico	Cancun	Lower Middle
Mexico	San Jose del Cabo	Lower Middle
Mexico	Los Cabos	Lower Middle
Mexico	Cabo San Lucas	Lower Middle
Southern US	Palm Beach	High
Southern US	Miami Beach	High
Southern US	Naples	High
Southwest US	Scottsdale	Upper Middle
Western US	San Diego	High

Biggest Risers for 2021

Region	Specific Destinations	Participant Preference
Caribbean	Cap Cana	High
Hawaii	Kailua	High
Southern US	Manalapan	High
Southern US	Boca Raton	High
Southern US	Key Biscayne	High
Southern US	Naples	High
Southern US	Ameillia Island	High
Southern US	Marco Island	High
Southern US	Orlando	High
Southern US	Miami Beach	High
Southern US	Key Largo	High
Southern US	Key West	High
Southwest US	Scottsdale	Upper Middle
Southwest US	Phoenix	Upper Middle
Western US	Laguna Beach	High
Western US	Rancho Mirage	High
Western US	Santa Barbara	High
Western US	Dana Point	High
Western US	Newport Beach	High
Western US	San Diego	High

Biggest 'Fallers' for 2021

Region	Specific Destinations	Participant Preference
Caribbean	Grand Cayman	High
Caribbean	Oranjestad	High
Caribbean	Aruba	High
Caribbean	Montego Bay	High
Central America	Guanacaste	Upper Middle

Cruise Line Bookings

- While the cruise industry is getting back on its feet, a sample of cruise line destination requested quotes for 2020-21 breaks down like this:

Destination	Number of Quotes 2020-21	Number of Quotes 2021
Caribbean	381 (42%)	62 (31%)
Europe (Mediterranean)	290 (32%)	91 (44%)
Europe (River)	166 (18%)	27 (13%)
Alaska	52 (6%)	17 (8%)
South Pacific	13 (1%)	3 (1%)
Hawaii	8 (1%)	6 (3%)

Key Findings

- While sunny destinations are highly motivating and highly popular for cruise line bookings, the cruise data shows that European River and Mediterranean cruises account for almost six-in-ten (57%) of requested quotes so far in 2021.
 - So far, the proportional shift of cruises in 2021 seems to favor Europe over the Caribbean.
 - Demand for Europe is increasing, which is great news given the high motivational appeal of Europe.

The following companies shared their booking data to support this study:

Cvent
3-D Cruise Partners

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