

*Reference Deck:*

# **Incentive Travel Destination Preferences & Their Impact on Motivation**

**2022**

# Introduction

- In June 2021, the IRF fielded a study that examined attitudes and preferences toward incentive travel.
  - The results of the study showed that, despite lingering concerns about COVID-19, **incentive travel was still a highly motivating award, but the types of experiences and destinations participants preferred had changed since prior to the pandemic.**
  - The types of experiences participants preferred in 2021 reflected **a greater interest in outdoor spaces and greater separation from people, as contrasted with large cities and crowds.**
  - Not surprisingly, there was a **strong preference for staying within North American locations** rather than traveling abroad, particularly to Asia or Africa.
  - The 2021 study also showed **a strong interest toward greater flexibility and personalized experiences.** This is something previous studies showed began prior to the pandemic but was further accelerated by the impact of COVID-19.

# Introduction (continued)

- The study also examined the alignment between what participants preferred in their incentive travel experiences versus what travel planners were booking.
  - The findings showed, for the most part, good alignment between preferences and bookings, but considered the impact of compression and availability since previously planned trips had to be postponed and re-scheduled.
  - The findings also revealed opportunities for new destinations and experiences that may have been previously under-utilized.
- The current wave updates the 2021 findings and reveals whether the preference shifts have endured post-pandemic, or if there has been a shift toward other destinations which may have re-opened since the pandemic has somewhat subsided.

# Key Questions

- Have the shifts in preferences we observed in 2021 remained stable or are preferences once again shifting as the pandemic has receded?
- Which destinations are the most motivating in 2022?
- What features about the award trip are most motivating and important to participants?
  - Are these features the same as we observed in 2021?
- What's changed since the mid-June 2021 since the previous wave of the study was published?
- What differences exist between men and women? Those married and/or with children versus those who are single and/or without children?
  - Has there been any change in these groups since people are less isolated?

# Methodology

- 405 respondents
  - While the sample is limited to US residents in origin who work in a sales role, the study lays the foundation for further exploration with other diverse populations.
- 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	2021 Percent	2022 Percent
Retail/Wholesale	22%	38%
Manufacturing/Industrial	13%	4%
Banking/Financial Services/Insurance	12%	12%
IT/Technology	9%	12%
Professional Services	7%	6%
Automotive	6%	5%
Entertainment/Media	5%	1%
Health and Medicine	5%	2%
Hospitality/Travel/Leisure	4%	4%
Education	4%	2%
Pharmaceutical	3%	3%
Other	12%	10%

# Sample Characteristics

Gender	2021 Percent	2022 Percent
Male	54%	55%
Female	46%	43%

Marital Status	2021 Percent	2022 Percent
Married	64%	63%
Single	18%	24%
Living with a partner	9%	8%
Divorced/Separated	8%	3%
Widowed	2%	<1%

# Sample Characteristics

Children Living in Household	2021 Percent	2022 Percent
Have children under 5 living at home	20%	19%
Have children between 5-11 living at home	24%	36%
Have children between 12-18 living at home	24%	21%
Have children over the age of 18 living at home	9%	4%
Have no children living at home	44%	35%



# Sample Characteristics

Generation*	2022 Percent
Gen Z (21-25)	9%
Millennials (26-41)	61%
Gen X (42-57)	22%
Boomers (58-76)	8%

\* Not asked in 2021 study



# Key Findings

- The 2021 study showed a very high percentage (80%) who found incentive travel to be 'extremely' or 'very' motivating'.
  - This year, the reported percentage has risen to **91%**, with only 1% stating they did not find incentive travel to be 'motivating at all'.
  - This suggests that, currently, a group incentive travel award is a near universal sales incentive, with only rare exceptions to the rule.
- Like last year, both genders find group incentive travel highly motivating, with males being only slightly more enthusiastic.
- This year, there were no observed differences between those currently single compared to those married or living with a domestic partner on their enthusiasm toward group incentive travel.
- Like last year, those with children under the age of 18 living at home find group travel more motivating than those without children living at home, although the gap has narrowed.
- Younger sales professionals (Gen Z, Millennials) are especially enthusiastic about group incentive travel compared to their older counterparts (Gen X, Boomers) although all generations find group incentive travel appealing to a very large extent.

# Key Findings (continued)

- As positively as group incentive travel was rated, *Individual* incentive travel awards received even higher ratings for motivational appeal.
  - Ninety-six percent (96%) rated individual incentive travel as being 'extremely' or 'very' motivating, up from 84% last year.
  - Only one person out of 405 said that individual incentive travel was 'not motivating at all'.
- A new question was asked in 2022 as to whether the participants felt the award selection process was fair.
  - In this instance, 85% felt the award selection process was 'extremely' or 'somewhat' fair.
  - Only 2% felt the award selection process was not fair at all.

# 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	2021	2022
Extremely motivating	48%	<b>57%</b>
Very motivating	32%	34%
Somewhat motivating	19%	8%
Not motivating at all	2%	1%

# 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	57%	59%	56%
Very motivating	34%	34%	32%
Somewhat motivating	8%	6%	11%
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 a group travel experience?*

Motivational Impact	Married or with a Partner	Currently Single	Kids under 18 at home	No kids under 18 at home
Extremely motivating	57%	58%	<b>60%</b>	52%
Very motivating	33%	33%	33%	31%
Somewhat motivating	9%	8%	6%	13%
Not motivating at all	1%	2%	<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 a group travel experience?*

Motivational Impact	Gen Z	Millennials	Gen X	Boomers
Extremely motivating	<b>76%</b>	<b>59%</b>	45%	53%
Very motivating	19%	34%	35%	41%
Somewhat motivating	5%	6%	17%	6%
Not motivating at all	0%	1%	3%	0%



# 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	2021	2022
Extremely motivating	53%	<b>61%</b>
Very motivating	31%	35%
Somewhat motivating	14%	4%
Not motivating at all	1%	<1%

# 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	61%	64%	57%
Very motivating	35%	33%	37%
Somewhat motivating	4%	3%	5%
Not motivating at all	<1%	0%	1%

# 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	Married or with a Partner	Currently Single	Kids under 18 at home	No kids under 18 at home
Extremely motivating	61%	61%	59%	66%
Very motivating	35%	34%	37%	30%
Somewhat motivating	3%	5%	4%	4%
Not motivating at all	1%	0%	<1%	0%

# 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	Gen Z	Millennials	Gen X	Boomers
Extremely motivating	68%	60%	58%	69%
Very motivating	27%	36%	37%	28%
Somewhat motivating	5%	4%	4%	3%
Not motivating at all	0%	<1%	0%	0%

# 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	2021	2022
A great deal of value	75%	80%
Some value	24%	19%
Little or no value	1%	<1%

# 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	80%	83%	77%
Some value	19%	17%	22%
Little or no value	<1%	0%	1%

# 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	Married or with a Partner	Currently Single	Kids under 18 at home	No kids under 18 at home
A great deal of value	80%	80%	79%	81%
Some value	19%	20%	20%	18%
Little or no value	1%	0%	<1%	1%

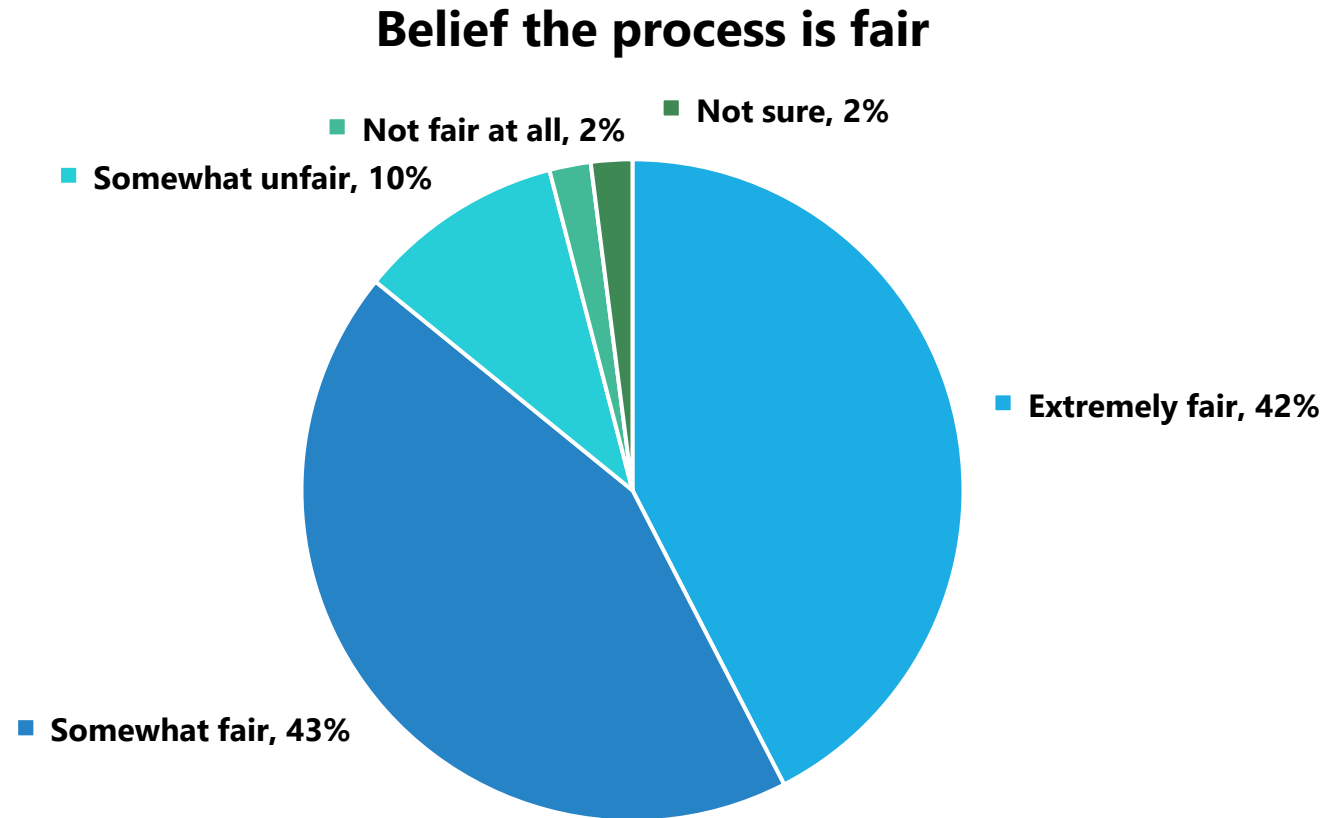
# Overall Appeal of Incentive Travel

*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	Gen Z	Millennials	Gen X	Boomers
A great deal of value	89%	78%	80%	88%
Some value	11%	21%	19%	13%
Little or no value	0%	<1%	1%	0%



# Do you believe the incentive travel award process for your company is fair?





# Key Findings

- The most important aspect of an incentive travel experience is **being given 'ample time to relax'** (87%).
  - This is a new attribute added to this year's study that was not included in the previous wave.
- Being able to take someone along , having the trip offer luxury accommodations and experiences, and being provided spending money to cover out-of-pocket expenses were also considered extremely important trip features in 2022 as they were in 2021.
- The largest shift in importance was **having the opportunity to be recognized in front of your peers**, which had an extremely large gain from 2021 when it was considered far less important.
  - This is likely reflective of being able to return to larger group events that better facilitate peer-wide recognition.

# Key Findings (continued)

- In addition to stating importance, the participants were asked to *rank order their priorities* on ten (10) aspects of their incentive experience with '1' being the most important and '10' being the least important.
- In 2021, the three highest ranked priorities were (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.
  - This year, the preceding priorities were still the most highly ranked, but **having additional expenses covered** virtually tied **being able to bring someone along** as the top ranked priority.
  - **Having 5-star luxury accommodations** virtually tied with **choosing an appealing destination** as the next most important priorities.

# Key Findings (continued)

- In 2021, Cvent data indicated the percentage that included luxury accommodations in their events had grown to 85%, mirroring the high priority placed on this facet of the experience.
  - In 2022, the percentage of luxury accommodation bookings **remains high at 84%**.

# Priorities and Drivers of Positive Incentive Trip Experiences

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

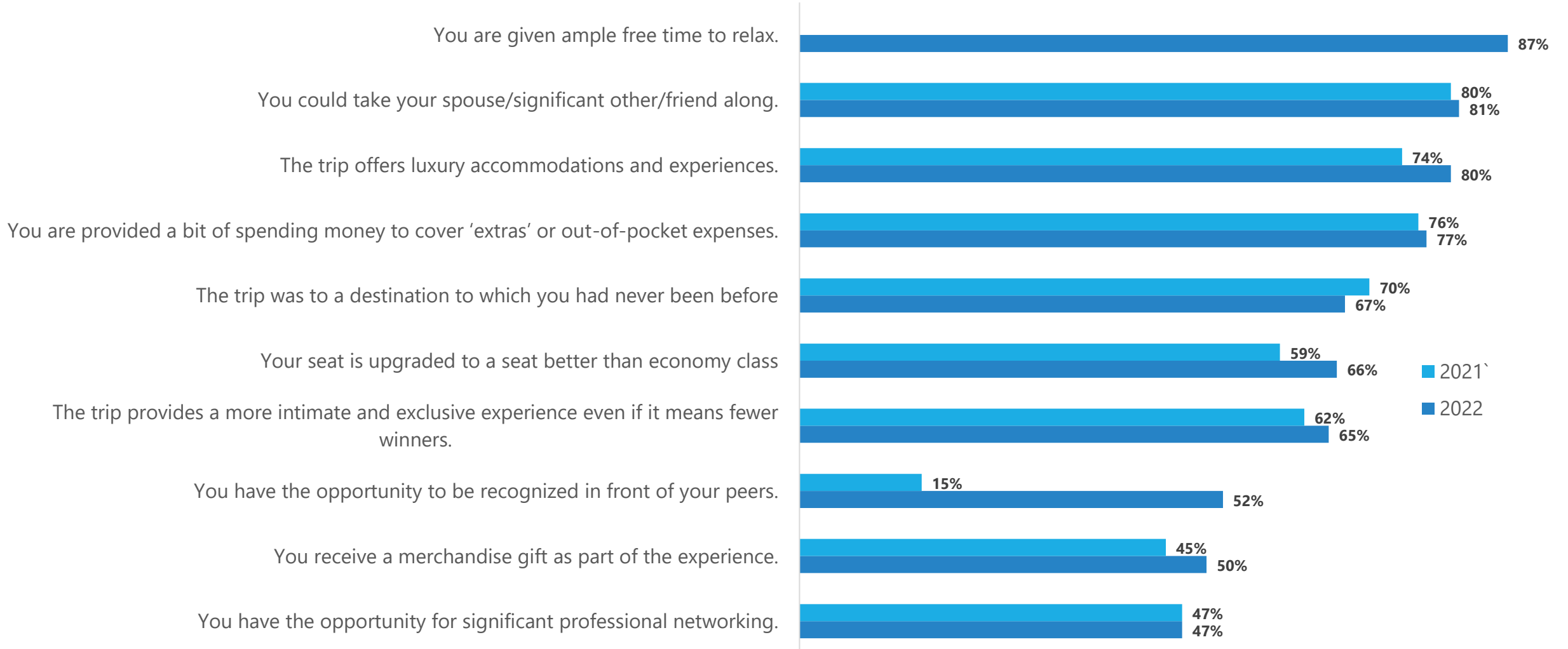
Area	% Extremely Important	'Somewhat' or 'Extremely' Important	'Somewhat unimportant' or 'Not important at all'	Net
You are given ample free time to relax.	54%	89%	2%	87%
You could take your spouse/significant other/friend along.	30%	85%	4%	81%
The trip offers luxury accommodations and experiences.	44%	84%	4%	80%
You are provided a bit of spending money to cover 'extras' or out-of-pocket expenses.	39%	82%	5%	77%
The trip was to a destination to which you had never been before.	31%	75%	8%	67%
Your seat is upgraded to a seat better than economy class	34%	74%	8%	66%

# 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
The trip provides a more intimate and exclusive experience even if it means fewer winners.	26%	73%	8%	65%
You have the opportunity to be recognized in front of your peers.	29%	65%	13%	52%
You receive a merchandise gift as part of the experience.	26%	65%	15%	50%
You have the opportunity for significant professional networking.	28%	61%	14%	47%

# Net Change in Importance 2021-2022







# 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 Top Three 2021	% Ranked Top Three 2022	Average Ranking 2021	Average Ranking 2022
All expenses are covered at all-inclusive or with spending money.	53%	47%	4.26	4.33
You can bring a spouse/significant other/friend.	57%	48%	3.93	4.37
The trip is to a destination you really find appealing.	49%	40%	4.16	4.77
The trip offers 5-star luxury accommodations and experiences (e.g., hotels, dining, etc.)	41%	39%	4.63	4.78
The length of trip is most appropriate for your personal situation.	21%	26%	5.80	5.48
There are some great activities planned that you really enjoy.	22%	25%	5.58	5.50

# Priorities and Drivers of Positive Incentive Trip Experiences (continued)

Area	% Ranked Top Three 2021	% Ranked Top Three 2022	Average Ranking 2021	Average Ranking 2022
There are opportunities for excursions and sightseeing.	18%	24%	5.87	5.66
There is an opportunity to interact with the locals and experience the true authentic culture.	16%	18%	6.42	6.44
There are significant opportunities for health and wellness opportunities.	12%	16%	7.00	6.57
There is an opportunity to participate in a community service project as part of the overall experience.	12%	15%	7.35	7.10



# 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
All expenses are covered at all-inclusive or with spending money.	18%	47%	20%	4.33
You can bring a spouse/significant other/friend.	20%	48%	19%	4.37
The trip is to a destination you really find appealing.	15%	40%	21%	4.77
The trip offers 5-star luxury accommodations and experiences (e.g., hotels, dining, etc.)	12%	39%	19%	4.78
The length of trip is most appropriate for your personal situation.	9%	26%	29%	5.48
There are some great activities planned that you really enjoy.	8%	25%	31%	5.50

# 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.	5%	24%	24%	5.66
There is an opportunity to interact with the locals and experience the true authentic culture.	4%	18%	44%	6.44
There are significant opportunities for health and wellness opportunities.	3%	16%	45%	6.57
There is an opportunity to participate in a community service project as part of the overall experience.	5%	15%	56%	7.10

# Key Findings

- Participants were asked to rank order their preferred destination experiences from '1' (most preferred) to '12' (least preferred).
  - In terms of prioritization, the **three top destination experiences** are (1) **beach/sunshine**; (2) **adventure travel**; (3) **mountains**.
  - These are the same three top rated priorities from the previous year.
- Several experiences shifted significantly in the rankings from 2022.
  - Visiting **a wellness spa**, which ranked near the bottom of preferred experiences in 2021, moved up to the overall fourth ranked experience preference.
  - **Cruising**, which ranked last as a preferred experience in 2021, rose significantly in rankings in 2022.
  - **Larger metropolitan areas** also showed increased prioritization.
- **The lowest ranked experiences** in 2022 were **visiting smaller cities**, going to primarily **English-speaking areas**, and going to **wooded/nature areas**.
- **Half (50%)** indicated their ideal length of an incentive trip was **between 4-6 days**.

# 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 Top Three 2021	% Ranked Top Three 2022	Average Ranking 2021	Average Ranking 2022
Beach/sunshine	55%	55%	4.11	4.16
Adventure travel	32%	37%	5.54	5.56
Mountains	32%	22%	5.81	6.42
Wellness spa	16%	26%	7.55	6.45
Cultural importance	21%	24%	6.54	6.51
Cruise	18%	27%	7.79	6.63
Large metropolitan area	17%	22%	7.48	6.65
Historical location	29%	20%	5.88	6.73
Shopping	18%	22%	7.28	6.97

# Priorities and Drivers of Positive Incentive Trip Experiences (continued)

Experience type	% Ranked Top Three 2021	% Ranked Top Three 2022	Average Ranking 2021	Average Ranking 2022
Wooded/nature area	22%	16%	6.50	7.00
Primarily English-speaking	25%	16%	6.46	7.33
Smaller city	15%	12%	7.05	7.58



# 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	33%	55%	11%	4.16
Adventure travel	11%	37%	18%	5.56
Mountains	5%	22%	19%	6.42
Wellness spa	5%	26%	25%	6.45
Cultural importance	6%	24%	24%	6.51
Cruise	8%	27%	30%	6.63
Large metropolitan area	8%	22%	25%	6.65
Historical location	5%	20%	22%	6.73
Shopping	8%	22%	32%	6.97



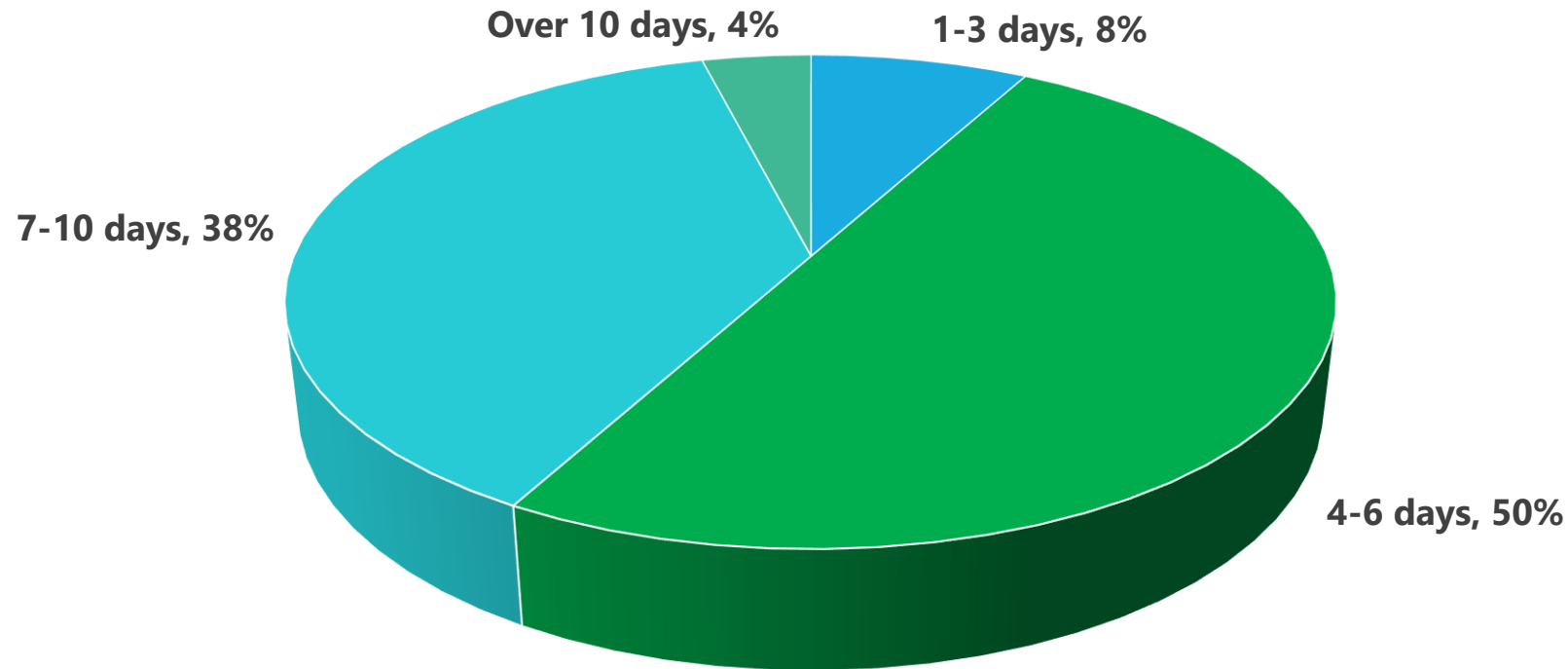


# Priorities and Drivers of Positive Incentive Trip Experiences (continued)

Experience type	% Ranked #1	% Ranked Top Three	% Ranked Bottom Three	Average Ranking
Wooded/nature area	3%	16%	27%	7.00
Primarily English-speaking	5%	16%	34%	7.33
Smaller city	3%	12%	34%	7.58

# Ideal Length of an Incentive Trip

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



# Event data on the duration of booked trips 2019-2022

Slightly more than half (53%) of booked trips falls into the 4-6 day range.

	2019	2020	1 <sup>st</sup> part 2021	2 <sup>nd</sup> part 2021-2022
1 - 3 days	32%	26%	24%	23%
4 - 6 days	47%	50%	51%	53%
7 - 13 days	18%	23%	23%	21%
14+ days	3%	3%	2%	3%



# Key Findings

- The survey asked participants how their interest in various aspects of incentive trips have changed since June 2021, the point at which the last survey was conducted to see if pandemic trends have continued, subsided, or reversed themselves.
- In June 2021, the last study found significantly greater 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
  - An incentive trip where you stay at an all-inclusive resort
  - An incentive trip to which you can drive
- The previous wave of the study also showed a significant decrease in interest for cruising and incentive travel experiences that involved mingling with large groups of people.

# Key Findings (continued)

- Since June 2021, the largest increase in interest has involved staying at luxury hotels, as well as all-inclusive resorts.
  - In both cases, 70%+ expressed greater interest since last year, with only small numbers reporting decreased interest for a net gain of +66%.
- Two experiences that have continued to trend upward since the pandemic are staying in private vacation residences and staying in private units at large resorts.
- Cruising and mingling with large groups of people showed nice rebounds from last year where people are once again show greater interest in these experiences.

# Changes Since June 2021

***Since mid-2021, please indicate whether your interest in receiving each of the following as an award gift has significantly increased, somewhat increased, stayed the same, somewhat decreased or significantly decreased.***

Area	% 'Significantly' Increased	% Increased (Total)	% 'Significantly' Decreased	% Decreased (Total)	Net
An incentive trip featuring a stay at a luxury hotel	34%	70%	1%	4%	+66%
An incentive trip where you stay at an all-inclusive resort	35%	71%	1%	5%	+66%
An individual travel experience where you stay in a private vacation residence with only your spouse/significant other	32%	67%	1%	4%	+63%
An incentive trip where you stay in a private unit that is part of a larger resort	28%	67%	1%	5%	+62%

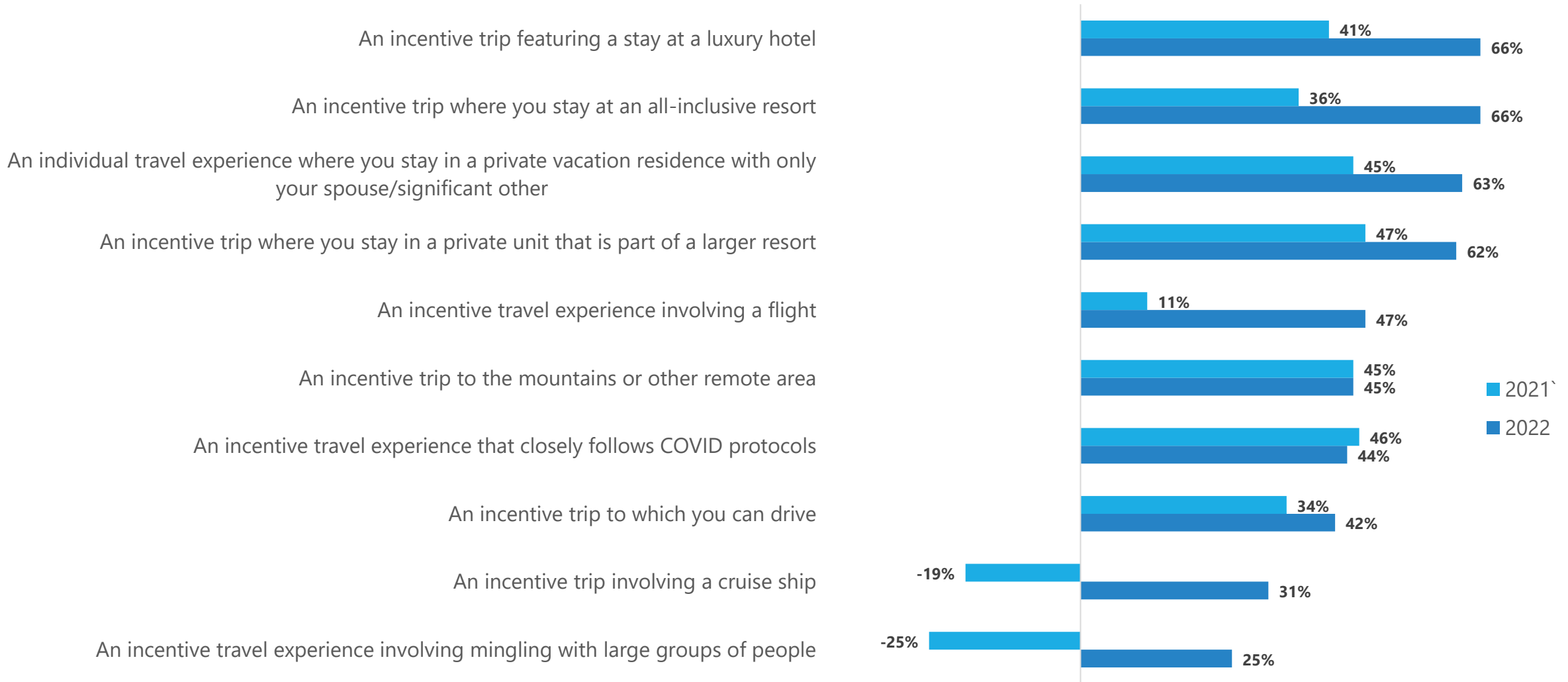
# Changes Since June 2021 (continued)

Area	% 'Significantly' Increased	% Increased (Total)	% 'Significantly' Decreased	% Decreased (Total)	Net
An incentive travel experience involving a flight	21%	55%	3%	8%	+47
An incentive trip to the mountains or other remote area	18%	55%	3%	10%	+45%
An incentive travel experience that closely follows COVID protocols	26%	56%	4%	12%	+44%
An incentive trip to which you can drive	19%	53%	3%	11%	+42
An incentive trip involving a cruise ship	23%	53%	9%	22%	+31
An incentive travel experience involving mingling with large groups of people.	20%	47%	7%	22%	+25





# Net Change in Interest (Increase/Decrease) 2021-2022





# Key Findings

- 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.
  - The study compares 2021 preferences to 2022 preferences to show increases/decreases in prioritized rankings.
- The same four destinations that were ranked at the top in the 2021 study remained at the top in 2022, (1) **Hawaii**, (2) the **Caribbean**, (3) the **Western United States** and (4) **Western Europe**.
  - Participants showed an even stronger preference for the Caribbean and the Western United States than they did in 2021.
- **Mexico**, which ranked low in the 2021 study, rebounded and made the top 10 in 2022, as the 'biggest riser'.

# Key Findings (continued)

- While **Alaska** was still a Top 10 destination, it showed a significant decline from 2021.
  - The largest decline from 2021 was **Southeast Asia**, which is likely due to continuing COVID concerns from the region as well as political unrest in Hong Kong.
  - Most of the significant declines in interest came from regions that were already ranked low in 2021.

# 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: Top Tier

Destination	Comparison to 2021
#1 Hawaii	Top ranked destination in 2021, with no change in preference or ranking
#2 Caribbean (incl Puerto Rico)	Also ranked #2 in 2021, <b>increase</b> in preference share in 2022
#3 Western United States (e.g., California, Las Vegas)	Also ranked #3 in 2021, with a slight <b>increase</b> in preference share in 2022
#4 Western Europe (Germany, France, Italy)	Also ranked #4 in 2021, with no significant change in preference share

# Top Ranked Destinations: 2<sup>nd</sup> Top Tier

Destination	Comparison to 2021
#5 Southern United States (e.g., Florida, Louisiana)	Ranked #6 in 2021, no significant change in preference share
#6 Southwest United States (e.g., Arizona, New Mexico, Texas)	Ranked #9 in 2021, <b>increase</b> in preference share
#7 Eastern United States (e.g., New York, Maine, Vermont, Massachusetts)	Ranked #11 in 2021, <b>increase</b> in preference share
#8 Alaska	Ranked #5 in 2021, <b>decrease</b> in preference share
#9 Mexico	Ranked #15 in 2021, <b>increase</b> in preference share
#10 Canada (e.g., Ontario, British Columbia, Quebec)	Ranked #7 in 2021, no significant change in preference share
#11 Central America (e.g., Costa Rica, Panama)	Ranked #12 in 2021, <b>increase</b> in preference share



# 3<sup>rd</sup> Tier Destinations

Destination	Comparison to 2021
#12 South America (Chile, Brazil)	Ranked #10 in 2021, no change in preference share
#13 Oceania (e.g., Polynesia, Micronesia)	Ranked #8 in 2021, <b>decrease</b> in preference share
#14 Middle East (e.g., Dubai, Egypt)	Ranked #19 in 2021, <b>increase</b> in preference share
#15 South Asia (e.g., India, Maldives)	Ranked #14 in 2021, <b>decrease</b> in preference share
#16 Midwest United States (e.g., Chicago)	Ranked #21 in 2021, <b>increase</b> in preference share
#17 Northeast Asia (e.g., Hong Kong, Macau)	Also ranked #17 in 2021, <b>decrease</b> in preference share
#18 North Africa (e.g., Morocco)	Also ranked #18 in 2021, <b>decrease</b> in preference share
#19 Emerging Europe (e.g., Hungary, Romania)	Ranked #16 in 2021, <b>decrease</b> in preference share



# Lowest Ranked Destinations

Destination	Comparison to 2021
#20 Southeast Asia (e.g., Singapore, Vietnam)	Ranked #13 in 2021, <b>decrease</b> in preference share
#21 Southern Africa	Ranked #20 in 2021, <b>decrease</b> in preference share
#22 East Africa (e.g., Kenya, Madagascar)	Also ranked #22 in 2021, no significant change in preference share
#23 West Africa (e.g., Nigeria, Senegal)	Also ranked #23 in 2021, <b>decrease</b> in preference share

# Biggest 'Risers'

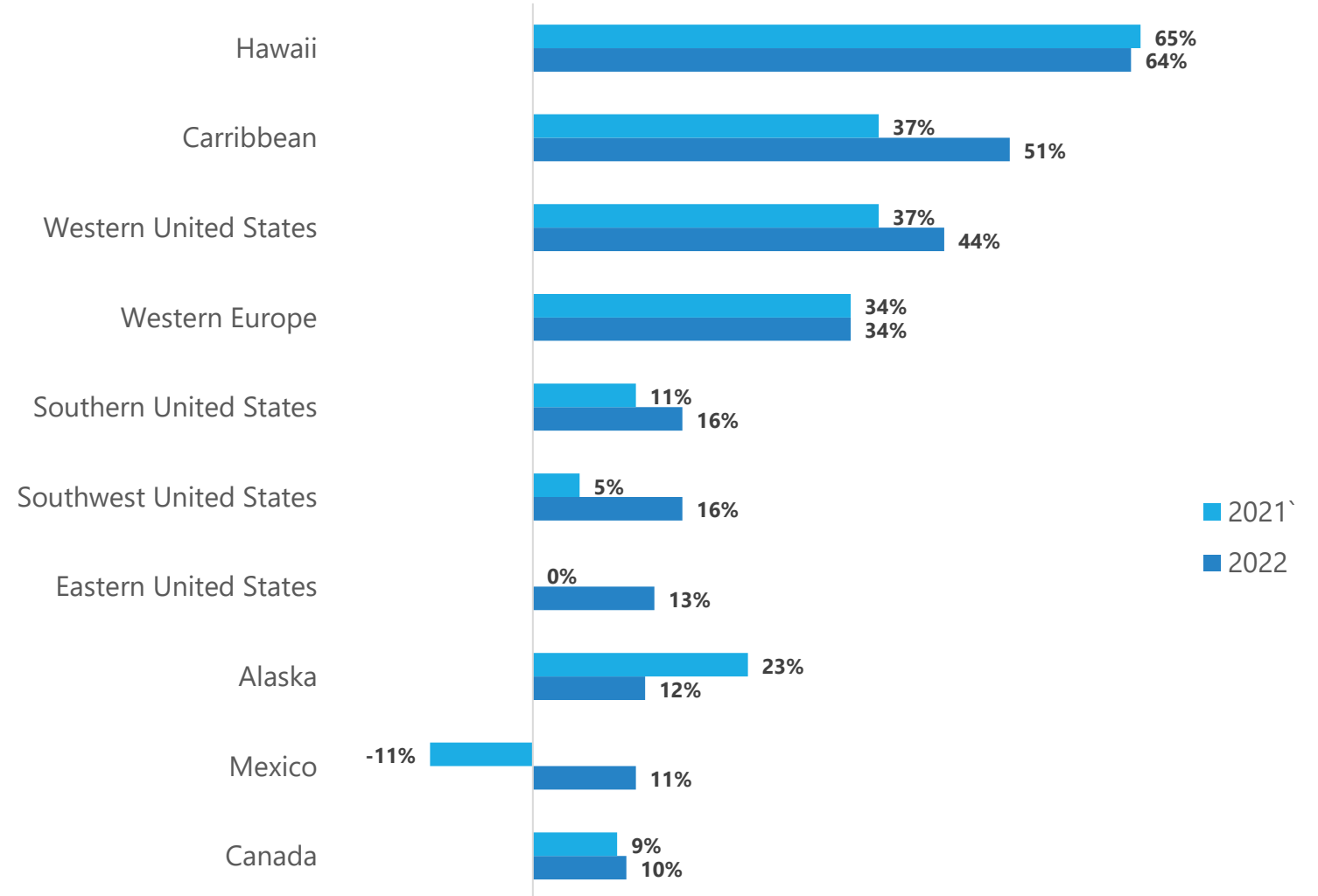
Destination	Net increase
Mexico	+22%
Caribbean	+14%
Middle East	+13%
Eastern United States	+12%
Southwest United States	+11%
Central America	+8%
Western United States	+7%
Midwest United States	+6%

# Biggest 'Decliners'

Destination	Net increase
Southeast Asia	-24%
Alaska	-11%
Southern Africa	-11%
Oceania	-10%
West Africa	-10%
South Asia	-8%
Northeast Asia	-7%
North Africa	-6%
Emerging Europe	-9%

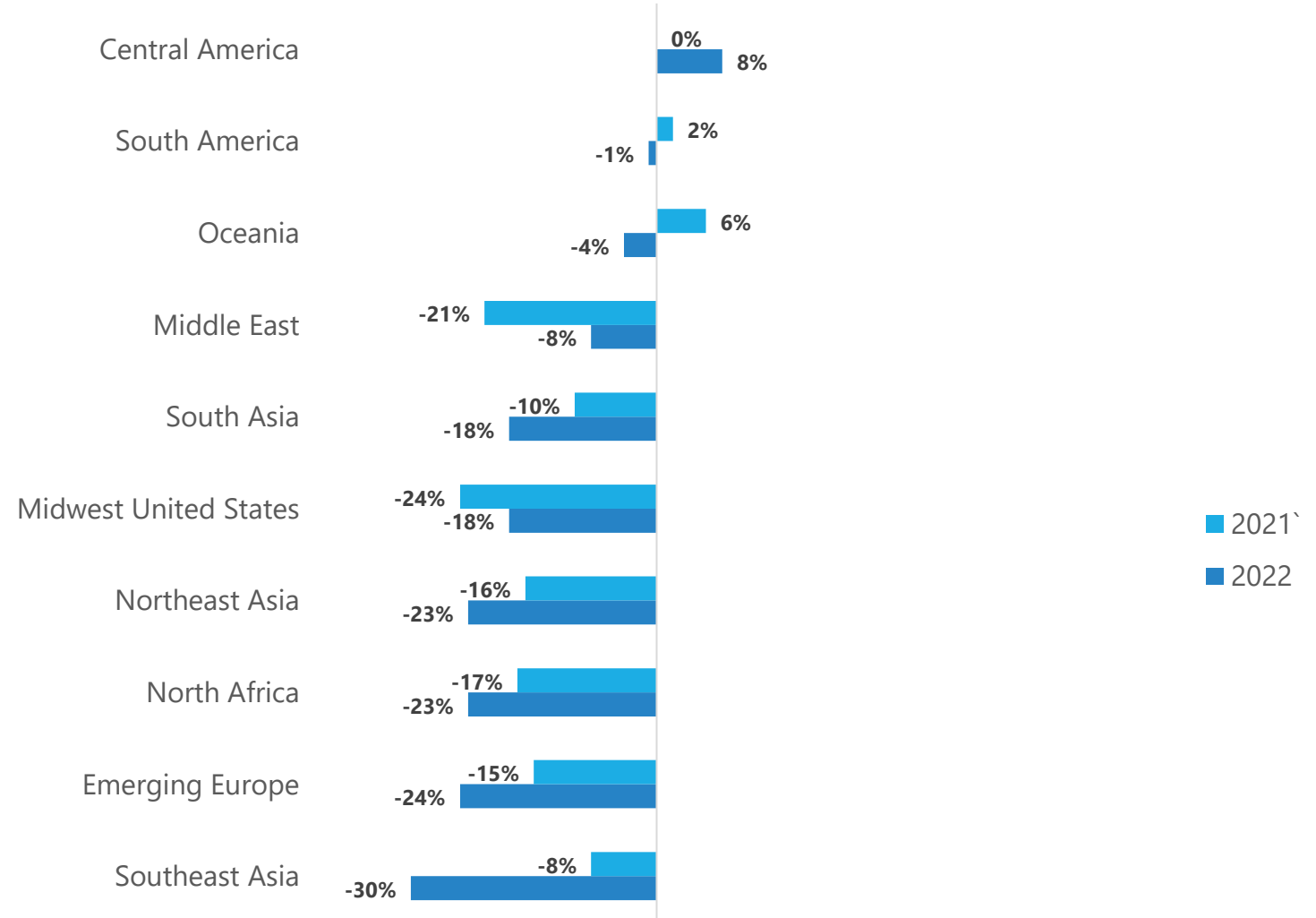


# Net Change in Destination Preferences (Top 7/Bottom 7) 2021-2022

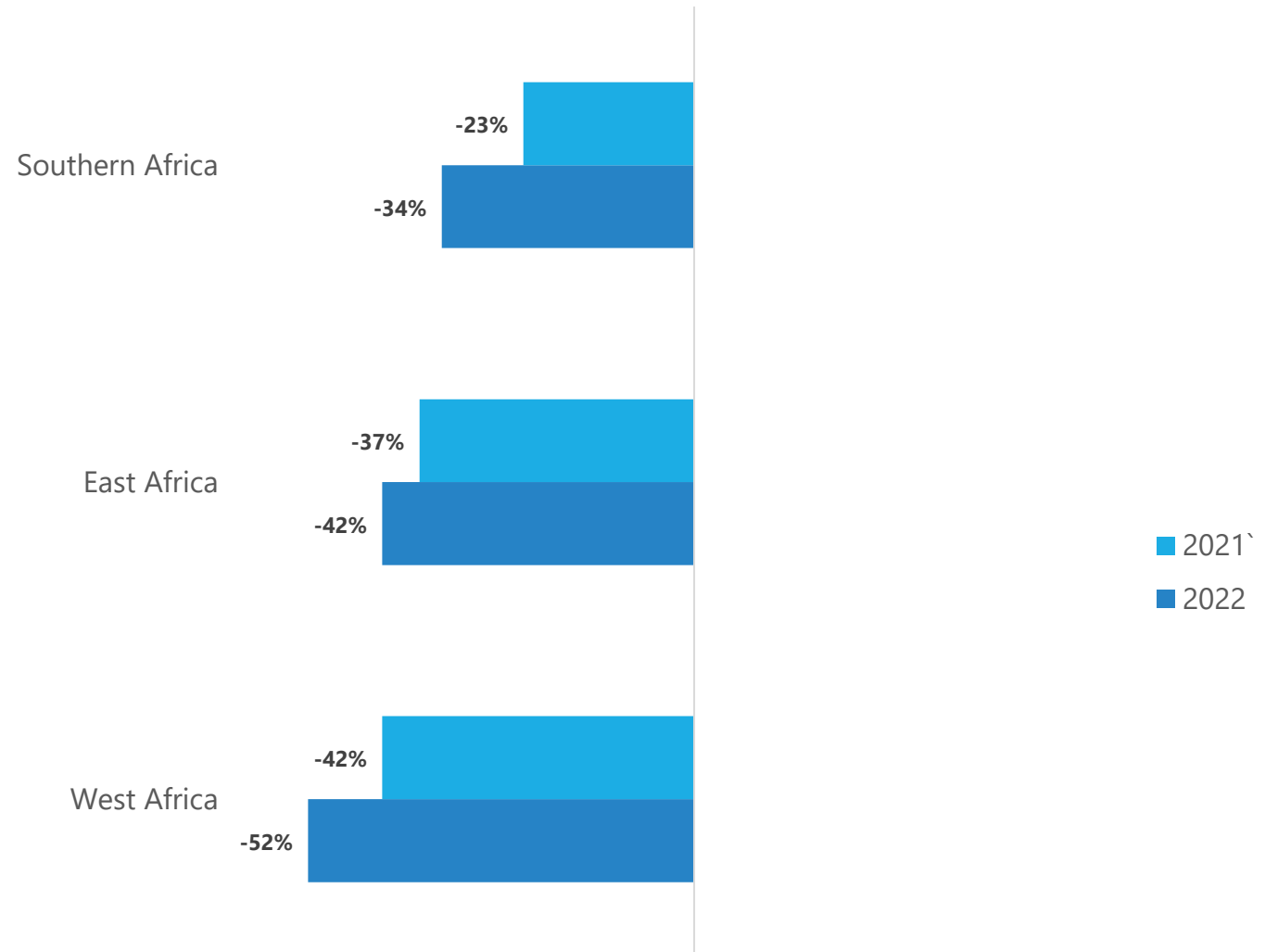




# Net Change in Destination Preferences (Top 7/Bottom 7) 2021-2022



# Net Change in Destination Preferences (Top 7/Bottom 7) 2021-2022



# 2022 Destination Preferences--Ranked

Region	Top 3	Top 7	Bottom 3	Bottom 7	Top/Bottom 3 Net	Top/Bottom 7 Net
Hawaii	42%	72%	4%	8%	+38%	+64%
Caribbean (incl Puerto Rico)	36%	63%	6%	12%	+30%	+51%
Western United States (e.g., California, Las Vegas)	34%	62%	8%	18%	+26%	+44%
Western Europe (Germany, France, Italy)	25%	51%	5%	17%	+20%	+34%
Southern United States (e.g., Florida, Louisiana)	21%	44%	13%	28%	+8%	+16%
Southwest United States (e.g., Arizona, New Mexico, Texas)	18%	39%	13%	23%	+5%	+16%
Eastern United States (e.g., New York, Maine, Vermont, Massachusetts)	22%	41%	16%	28%	+6%	+13%
Alaska	12%	34%	11%	22%	+1%	+12%
Mexico	12%	36%	14%	25%	-2%	+11%
Canada (e.g., Ontario, British Columbia, Quebec)	11%	37%	13%	27%	-2%	+10%
Central America (e.g., Costa Rica, Panama)	9%	35%	11%	27%	-2%	+8%
South America (Chile, Brazil)	5%	23%	8%	24%	-3%	-1%
Oceania (e.g., Polynesia, Micronesia)	7%	25%	10%	29%	-3%	-4%
Middle East (e.g., Dubai, Egypt)	9%	29%	15%	37%	-6%	-8%
South Asia (e.g., India, Maldives)	5%	20%	13%	38%	-8%	-18%
Midwest United States (e.g., Chicago)	7%	24%	23%	42%	-16%	-18%
Northeast Asia (e.g. Hong Kong, Macau)	6%	8%	12%	31%	-6%	-23%
North Africa (e.g., Morocco)	4%	14%	13%	37%	-9%	-23%
Emerging Europe (e.g., Hungary, Romania)	3%	12%	13%	36%	-10%	-24%
Southeast Asia (e.g., Singapore, Vietnam)	4%	11%	18%	41%	-14%	-30%
Southern Africa	2%	7%	11%	41%	-9%	-34%
East Africa (e.g., Kenya, Madagascar)	4%	10%	21%	52%	-17%	-42%
West Africa (e.g., Nigeria, Senegal)	2%	6%	29%	58%	-27%	-52%

# 2021 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

- At the end 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 101 unique mentions, representing one-quarter of the sample (25%).
  - Western Europe got the second highest number of regional mentions with 66 (16%).
- A complete list of specific destinations that were mentioned are presented in the following tables in alphabetical order.
- When asked why they picked their choice as their most preferred destination, some of the most common themes were:
  - Beauty/scenery/aesthetics
  - Beaches/sun/warmth
  - Activities available
  - Cultural heritage
  - Either previous experience or no previous experience with destination
  - Somewhere they always wanted to go

# Ideal Destination

Region	Specific area if mentioned	# of mentions
Africa (non-specific)		4
Alaska		9
Asia (non-specific)		1
Bahamas		7
Bali		1
Bermuda		2
Canada (non-specific)		11
Canada	Quebec	1
Canada	Toronto	2
Caribbean	Aruba	3
Caribbean	Barbados	1
Caribbean	Belize	3
Caribbean	Dominican Republic	2
Caribbean (non-specific)		12
Caribbean	Jamaica	2
Caribbean	Puerto Rico	2
Caribbean	St. Martin	2
Central America	Costa Rica	3
Central America	Panama	1

# Ideal Destination

Region	Specific area if mentioned	# of mentions
East Asia	Japan	12
Eastern US	Cape Cod	1
Eastern US	New York	11
Eastern US	Pennsylvania	1
Eastern US	Washington , DC	1
Eastern US (non-specific)		2
Europe (non-specific)		11
Hawaii (non-specific)		100
Hawaii	Oahu	1
Mexico	Cancun	3
Mexico (non-specific)		11
Middle East	Dubai	8
Middle East	Egypt	5
Middle East (non-specific)		1
Middle East	Israel	2
Northern Africa	Morocco	1

# Ideal Destination

Region	Specific area if mentioned	# of mentions
Oceania	Australia	6
Oceania	Bora Bora	2
Oceania	New Zealand	2
Oceania	Tahiti	3
Russia		1
Siberia		1
South America (non-specific)		2
South America	Chile	1
South America	Brazil	4
South Asia	Maldives	7
South Asia	India	1
South Asia	Macau	1
South Asia	South Korea	1
Southeast Asia	Hong Kong	4
Southeast Asia	Thailand	1
Southeast Asia	Sanya	1
Southeast Asia	Singapore	1

# Ideal Destination

Region	Specific area if mentioned	# of mentions
Southeast Asia (non-specific)		3
Southern United States	Florida	8
Southern United States	Miami, Florida	3
Southern United States	Key West	1
Southwestern US	Dallas	1
Southwestern US	Texas	2
Spain		1
Washington (non-specific)		2
Western Europe	Amsterdam	1
Western Europe	Britain	1
Western Europe	England	2
Western Europe	Florence, Italy	1
Western Europe	Italy	14
Western Europe	Iceland	1
Western Europe	Ireland	4
Western Europe	Greece	3
Western Europe	France	18
Western Europe	Germany	7
Western Europe	London	1
Western Europe	England	2
Western Europe	Scotland	1
Western Europe	Switzerland	1
Western Europe	United Kingdom	2

# Ideal Destination

Region	Specific area if mentioned	# of mentions
Western Europe (non-specific)		3
Western United States	Los Angeles, CA	3
Western United States	California	8
Western United States	Colorado	1
Western United States	Las Vegas	16
Western United States	Oregon	1
Western United States	Utah	1
Western United States	Yosemite	1

# Reasons for First Preferred Destination

A great island with lots of beaches

Adventure and scenery.

All inclusive resorts and beautiful

Ancestry, history

Bahamas are beautiful and it would be a wonderful experience all around

Beach, sun, and fun.

Beaches

Beaches and great nightlife

Beaches and the sights

beautiful

Beautiful place

Beautiful scenery and fresh environment

Beautiful weather! And it has the ability to offer calm relaxation time or active adventure. I also like that we would be keeping money within the US.

Beautiful, really unique experience

because France is a romantic city

Because Hawaii is so beautiful

# Reasons for First Preferred Destination

Because I do

Because I hear it's nice

Because I heard it was beautiful there.

BECAUSE I KEEP SEENG HOW VIETNAM IS AWESOME

because i like

Because I love the food and culture there

Because I love the ocean and alligators

Because I really enjoyed it there before and I would like to go to France again

Because I speak Russian

Because I think it's great for both group activities and also if you've just got a single guest with you.

Because I want to experience the culture and the food

Because I would like to know the city

Because I would love to go to the mother land

Because I've seen propaganda on social media apps

Because is very important very helpful

Because it has a nice view

because it is an exotic destination full of beautiful landscapes and beaches

Because it is just really gorgeous!



# Reasons for First Preferred Destination

because it is very popular

Because it is where my ancestors are from

Because it sounds perfect

Because it would be the most interesting place to go to and the food is really good.

Because it's a big city and it has literally everything

Because it's a big beautiful place

Because it's more beautiful

Because it's the most beautiful country in the world and there's so much to see.

Because it's beautiful who wouldn't want to

Because it's soothing and gets you away from everything

Because it's the most luxurious and gorgeous place to enjoy and relax

Because it's where I want to go on a vacation

Because it's close by and there's many great places to see.

because I've always wanted to go and plus it beautiful down there

Because of covid-19 still is a problem around the world I prefer to stay in the united States.

Because of the look and quality

Because the scenery is beautiful and the people are warm

# Reasons for First Preferred Destination

Because the women are fine as wine and there and I want to see them

Because there are many famous sights there

Because they have beautiful weather and beaches & great food

Because the weather is very nice

Been there before and enjoyed it.

Been there many times and love the people and all the fun activities.

Best vacation I ever had.

Better for me

California is great you have warm beaches and nice sites

Cannabis

Cause it's really beautiful there there's a lot of fun things to do and beautiful women

Close by and exclusive

Cultural potential. Genealogical research.

Egypt has an ancient culture

Exotic and exclusive

Exotic destination and a once in a lifetime opportunity.

Fits somewhat well with our needs

# Reasons for First Preferred Destination

Food culture

For its tropical environment

For the culture, history, cuisine and scenic sites

For the history, food and beer

Friends that have vacationed there say its like paradise

Fun

Fun and exciting

fun destination

Fun place to go

Getting away from home gives you the opportunity to reflect on your life. You have the needed time and space to let your mind wander and take stock. Traveling is one of the best ways to learn more about yourself. Every day traveling brings a new set of is

Go for a walk on the beach

Go to Los Angeles and see something different

good views and good experience with the seas and mountains

Great destination

great place for tourism and adventures, good for businesses like ours

great rivers and lakes. natures at its best

Great view and delightful

# Reasons for First Preferred Destination

Has always seemed fascinating to me and it is a safe destination,

Have always wanted to visit and learn about their culture

Have never been to Europe and it's a very expensive destination.

Haven't been there

Having been there before you realize how much there is to explore. You can go back dozens of times not not see it all

Hawaii because of the weather and scenery

Hawaii has always been my dream vacation.

Hawaii is a US state, it has tropical weather and English is widely spoken there

Hiking

History and beauty

history, culture, beauty, food, wine

Hong Kong is my hometown!

i already mentioned in the last question.

i always want to go there

I always wanted to go there. Our family was born there and I want experience it

I ALWAYS WANTED TO VISIT HAWAII.

I am a huge fan of the beach (in general), it has amazing crystal clear blue water, and I am a big fisherman (and would expect some amazing tropical fishing).

# Reasons for First Preferred Destination

I am interested in their culture and the country

I am Italian and would love to go

I am mexican

I am very interested in the culture there and have been recommended by my friends

I choose Florida because it's a nice state the beaches are so nice

I chose Hawaii for it's natural beauty,all year long tropical weather and its inviting culture.The Hawaiian cuisines are impeccable to others.

I enjoy the atmosphere, the gambling and the shows along with the other attractions.

I enjoy the beaches and the livestyle that is in Hawaii. There is also a city lifestyle in certain parts of the country.

I feel like it's the most romantic place in the world

I have always wanted to go to HK. The food, the ability to get custom made suits cheaply, the culture. I'd love it.

I have always wanted to go. It seems beautiful and I love the beach and I would just love to go

I have always wanted to see the beauty and cities of Australia - from the Opera House to the coastline to fairy penguins to the Australia Zoo. Australia is a hard expense for the normal person, so as an incentive - Amazing! New Zealand too!

I have always wanted to travel to Mexico and see the beauty

# Reasons for First Preferred Destination

I have always wanted to visit some of the South American countries there are just some amazing vacation spots out there

I have been there and love it. The weather and atmosphere is perfect.

I have been to many great places.

I have been working on ancestry looking into where my family is originally from. I'd like to explore all of those areas and see whether or not there was actually any family members still living.

I have family there and love the culture

I have great memories of vacations spent on the cape in my youth.

I have never been and I have heard a lot of great things about it.

I have never been close and would love to see the northern lights.

I have never been here and it's a much desired locale

I have never been in Germany

I have never been there

I have never been there and from everything I see it is an amazing place

I have never been there and it is very expensive

i have never been there before and it seems like that destination would have everything that i could possibly ask for or want

I have never been to Canada, I think it is well worth visiting

# Reasons for First Preferred Destination

I have seen and read so much about that place and the colorful gardens and shops and cultural food and experiences I would love to see

I hear about how beautiful it is.

I heard it was gorgeous

I just love all the history and architecture

I just love it

I just love the clear water and white sandy beaches.

I like it there little of trees

I like the architecture and it is really nice

I like the culture of this country.

I like the scenery

I like the scenery in Nili

i like this place, i want to see the day and night at the same time

I like to go by boat. It's a good place to go on holiday

I like to relax in tropical settings

I like to visit many countries in europe

I live near the destination and it is appealing to me so I would actually take the time to go on that vacation due to ease and appeal

I love castles and I would love to go see some castles and go to some pubs and I want to wander around the countryside

# Reasons for First Preferred Destination

I love clear water, blue skies, and warm weather to relax and it fairly cheap

I love cruising and warm weather

i love islands and tropical weather

I love Japan and went there in high school.

I love Mexico and I've been there before so I know I would have a good time

I love the beach

I love the beach. And I've always wanted to travel to Hawaii to see their way of life. It looks relaxing.

I love the beach. I live in the mountains, so a change of scenery would be perfect.

I love the culture of California and I have family that lives in California

I love the ocean and the state

I love the Pacific Ocean, and there are so many things to do there

I love the sight of the resorts there and the hot weather that allows you to experience summer.

I love the southwest desert areas like Arches National Park

I prefer the sea in Hawaii.

I really love travel to here because is an excellent place to relax and enjoy.

I think it's great for family holidays

I think it's romantic



# Reasons for First Preferred Destination

I think that a vacation here would be the most interesting

I think that the destination would provide the best experience and would be the most rewarding itself out of all the destinations.

I think there's something really magical about it and I love Brazil and I want to go there again.

I think there's something special about this place

I think this would be the most interesting place to visit

I used to live in Honolulu. I like to back to visit again.

I want to experience the Caribbean lifestyle

I want to fully immerse myself in Asian culture

I want to go on safari

I want to see something different

I want to see the beautiful beaches.

I want to see the Statue of Liberty, which symbolizes freedom from tyranny. I want to go to Wall Street to see the financial institutions that have the most influence on the American economy

I would choose that destination because it looks really fun and better than the United States

I would like to see the galaxy

I would like to see where my fore fathers came from

I would love to go to France because it has Paris. There is so much rich history and it's a very beautiful country.

I would love to play golf and swim with the dolphins.

# Reasons for First Preferred Destination

I've always wanted to go there. I have always dreamed of traveling there the most.

I've always wanted to travel to Hawaii, experience the weather, try the cuisine, go surfing, not have to use a passport.

I've been before and want to make my husband go with me.

I've been close to Canada but have never been able to travel abroad

I've been wanting to go and visit

I've heard great things about traveling to Hawaii

I've never been to Switzerland and I love that part of Europe. The history, the food, the architecture, it's all amazing

I've never gone there but it's on my bucket list

idk just wanted to visit there

In a different hemisphere and an area I have never traveled.

In the current political and health environment I would be very nervous to travel outside of the US so my first choice is always going to be somewhere in the US and I have always wanted to go to a beautiful place like Hawaii

Is an world unique in culture and landscape

Is very innovative, is excellent

island beach vacation is most appealing...

islands are fun

# Reasons for First Preferred Destination

It feels like a place worth the risk

It has a lot fun things to do and you get to see most the celebrities there.

It has a lot nice place to visit like the casinos, restaurants and other great sites.

It has an impressive natural beauty, it is like being in paradise or the closest thing to it.

It has ancient riches

It has the most Beautiful Resort on the Beach

It is a cool place I would want to go and have fun and do fun acitivities

It is a fashionable city with a rich culture.

It is a place where I probably wouldn't be able to go otherwise.

It is a way to visit many places during one trip

It is always warm and not too touristy

It is awesome. No time wasted on travel.

It is beautiful

it is beautiful and i always wanted to go

It is exotic

It is exotic location. The opportunity to be in a hotspot is under the stars is a once in a lifetime opportunity.

It is in the United States and I would love to see it

It is my favorite destination I love it there.

# Reasons for First Preferred Destination

It is my favorite destination. Gorgeous area, basically paradise.

It is near and yet has many beautiful attraction

It is nice weather and not too far.

It is one of the states not many people travel to

It is part of the U S I have never been to but have always loved to see.

It is so lively and packed with things to do and see

It is the only state I have not visited. My dream is to go on a cruise that includes land trips to local towns and Denali.

It is very tropical and remote and very inclusive.

It just looks so beautiful and I would love to learn about the history. I would want to know their culture and learn more about it

It looks beautiful and I would love to visit.

It seems relaxing.

It sounds like a tropical paradise

It would be a great city to visit

It would be a great time.

It would be beautiful

it would be nice to go

It would give me the ability to visit the country of my heritage.

# Reasons for First Preferred Destination

It's a beautiful country that's rich in history and culture.

It's a beautiful thing

It's all about the money

It's beautiful and I have always wanted to visit

It's beautiful and the people are wholesome.

It's one of my favorite cities outside the US

It's someplace I'd really like to go.

It's somewhere I've never been

It's such a vibrant city with culture and great food and people and amazing fashion

It's where many films are made

It's amazing and pretty so I want to go and visit it

It's beautiful

It's beautiful and I've never been there before.

It's beautiful and there is so much to see and do.

It's international - English speaking, where we can navigate quickly yet learn so much new culture

# Reasons for First Preferred Destination

It's miami baby what happens in miami stays in miami

It's no too hard to get to, it luxurious and feels exclusive.

It's not a terribly long flight, they speak English, interesting culture, and plenty of fun/recreational activities are available.

It's relaxing and beautiful

It's somewhere that I have always wanted to go

It's the motherland of my people and I'd would like to visit.

It's very fascinating to me

its a beautiful safe place to travel

Its a tropical destination

its because like to feel the sun in my face

Its Hawaii. Perfect place to go

Its the one place i havent been that i want to go to the most

Jamaica is the tropical place to be carefree and adventurous while enjoying the locals and the cuisines of the islands.

Just because

Las Vegas is the most populous city in Nevada and the county seat of Clark County, Nevada. It has a huge tourism, shopping and vacation industry centered on gambling, so it is also known as the Gambling city and is one of the world's famous vacation places

# Reasons for First Preferred Destination

like your culture

long historical significance as well as architectural, cultural, religious. great food and many iconic sites

Lots of interesting history

Love it

Love it there plus there's family.

Love th3 tropics Don't need a passport

love the geography, food and sights.

Love the location

love the people and places to go

love the people and the country

Love the weather

Loved the atmosphere.

Miami Florida

My ancestors are from Ireland and I think it is one of the most beautiful places in the world!!!! I've been a couple times and would

My favorite place with great food, culture and nature

# Reasons for First Preferred Destination

Never been and I think it looks beautiful.

Never been there and the pictures are beautiful. Great reviews from friends

never been would love to go check it out

Never have been there and probably never will be able to afford

nope

Oktoberfest and Dusseldorf

One of my favorite sites to relax

Relaxing, exotic & looks gorgeous. Probably not a place I would be able to afford on my own.

Sanya can take a beach walk for a change of mood

Something that is the opposite of my normal. A ski resort in the east coast sounds fun and adventurous.

Laying in a beach in Jamaica or Bahamas with a drink in my hand sounds like a well enjoyed time

Spiritual

St Martin is beautiful and a lot of fun. There are plenty of things to do there too that appeal to a wide audience.

Still in America and beautiful

Take a picture in Times Square as a souvenir

that is my favorite place in the world to go on a trip

That is where I went for my honeymoon and we loved it

the art and culture interests me greatly



# Reasons for First Preferred Destination

The climate there is good and there are many characteristic buildings to enjoy

The climate there is good for holidays

The culture, shopping, excitement, etc

The night view there is really beautiful

The people there are very friendly. I can experience the local culture

The reasons why I chose that destination is amazing and it is amazing in Philadelphia

The sun is always shining.

The sun is always shining and easy to get to.

The warm weather, beautiful scenery, the culture & history. It's a dream vacation because it's so expensive I don't know if I'd be able to pay for it on my own.

The weather and culture plus I have never been there.

the weather and relaxation. Fun as well

There are a lot of activities and opportunities to experience the local culture

There are certain areas I still want to visit

There are eight months of fine, moderate weather in the year

There are lots of beaches and it's a great place to relax on holiday

There are many shopping malls with good value for money

There are so many foods to try and entertainment spots to go to in the Vegas and I'd like to enjoy myself there.

# Reasons for First Preferred Destination

There are so many places in it that I want to see

There are unique ancient buildings and fashionable cultural atmosphere.

There is a great amount of culture. Every one speaks English. You can use your American drivers license to get around. It easy to blend in, so you don't look like a tourist. And there is something for everyone .

There is a great mix of sightseeing and relaxing beach time

There is no place on Earth that I prefer being (aside from my home) than in Israel - my spiritual homeland and place of belonging.

There's a lot of beautiful natural scenery

There's a lot of nature there

They have the best food, art, and culture

this is an early appointment with colleagues to go to hawaii to play

This is so amazing.

Trying greatness and goods

unique destination from all aspects including historical, attractions and many more

Variety of cultures & food

Very cold and least place where you find problems...plus it has a very interesting culture and living 😊

Want to go

Weather, ocean and lots of excursions.

# Reasons for First Preferred Destination

Well I love anime and they have bunch of anime merchandise I could add to my collection and also good pokemon merchandise

Western Europe is really cool and traveling there is an amazing amazing experience.

Where do I want to see the sea

Who doesn't like Hawaii?

With many beaches and tourist spots, it is the paradise of American vacation

Wonderful experience the beauty is refreshing friendly people

You can experience the vibrant upper-class life there



# 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 2022.
- Cvent provided data on the most popular destinations chosen by incentive trip planners in 2022, 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).
- Cvent also noted that, overall, the volume of bookings has risen significantly in 2022.

# Key Findings

- The Cvent data show that there is strong alignment between destination demand and participant destination preferences.
  - It is interesting to note that five of the top 10 most booked destinations are located in Mexico.
  - While Mexico has been a top-booked destination, it ranked low on participant preferences last year.
    - This year, participants seem more positive toward Mexico which bodes favorably.
  - The 20 most booked destinations are all in either the United States, the Caribbean or Central America.
- The biggest risers in Cvent bookings tend to be destinations within the continental U.S.
  - Twelve (12) out of 20 'risers' are within the continental U.S.
- Locations that are 'falling' in booking tend to lean heavily toward Hawaiian locations.
  - While Hawaii is a tremendously popular location among participants, both availability and cost are likely making it a prohibitive destination.



# Most Booked Destinations for 2021-2022 (YTD)

Region	Specific Destinations	Participant Preference
Mexico	Playa del Carmen	2 <sup>nd</sup> Tier- High
Caribbean	Nassau	1 <sup>st</sup> Tier-Very High
Mexico	San Jose del Cabo	2 <sup>nd</sup> Tier- High
Mexico	Los Cabos	2 <sup>nd</sup> Tier- High
Mexico	Cancun	2 <sup>nd</sup> Tier- High
Southern US	Palm Beach	2 <sup>nd</sup> Tier-High
Mexico	Cabo San Lucas	2 <sup>nd</sup> Tier-High
Southwest US	Scottsdale	2 <sup>nd</sup> Tier-High
Southern US	Miami Beach	2 <sup>nd</sup> Tier-High
Central America	Guanacaste	2 <sup>nd</sup> Tier-High
Hawaii	Maui	1 <sup>st</sup> Tier-Very High
Caribbean	Grand Cayman	1 <sup>st</sup> Tier-Very High
Caribbean	Punta Cana	1 <sup>st</sup> Tier-Very High
Caribbean	Rio Grande	1 <sup>st</sup> Tier- Very High
Hawaii	Kohala Coast	1 <sup>st</sup> Tier-Very High
Caribbean	St. Thomas	1 <sup>st</sup> Tier-Very High
Western US	San Diego	1 <sup>st</sup> Tier-Very High
Caribbean	Riviera Maya	1 <sup>st</sup> Tier-Very High
Southern US	Naples, FL	2 <sup>nd</sup> Tier-High
Hawaii	Wailea	1 <sup>st</sup> Tier-Very High

# Top 20 Booked Destinations 2019-2022

2019	2020	2021-2022
Nassau (Caribbean)	Nassau (Caribbean)	Playa del Carmen (Mexico)
Playa del Carmen (Mexico)	Playa del Carmen (Mexico)	Nassau (Caribbean)
Grand Cayman (Caribbean)	San Jose del Cabo (Mexico)	San Jose del Cabo (Mexico)
Guanacaste (Central America)	Palm Beach (Southern US)	Los Cabos (Mexico)
Los Cabos (Mexico)	Honolulu (Hawaii)	Cancun (Mexico)
San Jose del Cabo (Mexico)	Maui (Hawaii)	Palm Beach (Southern US)
Cancun (Mexico)	Los Cabos (Mexico)	Cabo San Lucas (Mexico)
Palm Beach (Southern US)	Cancun (Mexico)	Scottsdale (Southwest US)
Cabo San Lucas (Mexico)	Grand Cayman (Caribbean)	Miami Beach (Southern US)
Montego Bay (Caribbean)	Cabo San Lucas (Mexico)	Guanacaste (Central America)
Punta Cana (Caribbean)	Guanacaste (Central America)	Maui (Hawaii)
Riviera Maya ((Caribbean)	Scottsdale (Southwest US)	Grand Cayman (Caribbean)
Honolulu (Hawaii)	Punta Cana (Caribbean)	Punta Cana (Caribbean)
Maui (Hawaii)	Wailea (Hawaii)	Rio Grande (Caribbean)
Aruba (Caribbean)	Montego Bay (Caribbean)	Kohala Coast (Hawaii)
St. Thomas (Caribbean)	Miami Beach (Southern US)	St. Thomas (Caribbean)
San Juan (Caribbean)	Kohala Coast (Hawaii)	San Diego (Western US)
Rio Grande (Caribbean)	St. Thomas (Caribbean)	Riviera Maya (Caribbean)
British West Indies (Caribbean)	San Diego (Western US)	Naples, FL (Southern US)
Oranjestad (Caribbean)	Kapalua (Hawaii)	Wailea (Hawaii)



# Biggest Risers for 2021-22

Region	Specific Destinations	Participant Preference
Southern US	Carolina	2 <sup>nd</sup> Tier-High
Southern US	Miami	2 <sup>nd</sup> Tier- High
Caribbean	Riviera Maya	1 <sup>st</sup> Tier-Very High
Southwest US	Tucson	2 <sup>nd</sup> Tier-High
Southern US	Fort Lauderdale	2 <sup>nd</sup> Tier-High
Caribbean	San Juan	1 <sup>st</sup> Tier- Very High
Mexico	Playa del Carmen	2 <sup>nd</sup> Tier-High
Southwest US	Phoenix	2 <sup>nd</sup> Tier-High
Central America	Guanacaste	2 <sup>nd</sup> Tier-High
Mexico	Riviera Nayarit	2 <sup>nd</sup> Tier-High
Caribbean	British West Indies	1 <sup>st</sup> Tier-Very High
Western US	Coronado	1 <sup>st</sup> Tier-Very High
Southern US	Charleston	2 <sup>nd</sup> Tier-High
Southern US	Kiawah Island	2 <sup>nd</sup> Tier-High
Western US	Park City	1 <sup>st</sup> Tier-Very High
Western US	San Diego	1 <sup>st</sup> Tier-Very High
Mexico	Cancun	2 <sup>nd</sup> Tier-High
Caribbean	Grand Cayman	1 <sup>st</sup> Tier-Very High
Southern US	Marco Island	2 <sup>nd</sup> Tier-High
Western US	Napa	1 <sup>st</sup> Tier-Very High

# Biggest Fallers for 2021-22

Region	Specific Destinations	Participant Preference
Mexico	Punta Mita	2 <sup>nd</sup> Tier-High
Southern US	Sea Island	2 <sup>nd</sup> Tier High
Hawaii	Hawaii	1 <sup>st</sup> Tier-Very High
Southern US	Bluffton	2 <sup>nd</sup> Tier-High
Hawaii	Kailua	1 <sup>st</sup> Tier-Very High
Western US	Ojai	2 <sup>nd</sup> Tier-High
Hawaii	Lanai City	1 <sup>st</sup> Tier-Very High
Hawaii	Honolulu	1 <sup>st</sup> tier-Very High
Hawaii	Wailea	1 <sup>st</sup> Tier-Very High
Caribbean	Saint Martin	1 <sup>st</sup> Tier-Very High
Southern US	Orlando	2 <sup>nd</sup> Tier-High
Hawaii	Kohala Coast	1 <sup>st</sup> Tier-Very High
Hawaii	Koloa	1 <sup>st</sup> Tier-Very High
Hawaii	Maui	1 <sup>st</sup> Tier-Very High
Southwest US	Sedona	2 <sup>nd</sup> Tier-High
Western US	Laguna Beach	1 <sup>st</sup> Tier-Very High
Western US	Santa Barbara	1 <sup>st</sup> Tier-Very High
Hawaii	Kapolei	1 <sup>st</sup> Tier-Very High
Western US	Colorado Springs	1 <sup>st</sup> Tier-Very High
Caribbean	Montego Bay	1 <sup>st</sup> Tier- Very High

# Cruise Line Bookings

- The cruise industry is showing a significant rebound. Here are the quotes and locations from 2019-2022 (so far).

Destination	Number of Quotes 2019	Number of Quotes 2020	Number of Quotes 2021	Number of Quotes 2022
Caribbean	273 (45%)	206 (37%)	211 (35%)	122 (27%)
Europe (Mediterranean)	108 (18%)	121 (21%)	120 (20%)	129 (29%)
River	99 (16%)	128 (23%)	86 (14%)	69 (15%)
Alaska	69 (11%)	56 (10%)	94 (16%)	75 (17%)
Other, includes Expedition (Antarctica, Galapagos, Arctic), Hawaii, Tahiti	54 (9%)	53 (9%)	93 (15%)	53 (12%)
Total	603	564	604	448

# Key Findings

- The cruise data show that, each year, the proportion of total cruises booked has been shifting away from the Caribbean toward Mediterranean European cruises.
  - In 2019, the total proportion of cruises planned for the Caribbean was 45%; thus far in 2022, it is 27%.
  - In 2019, the total proportion of cruises planned for the Mediterranean was 18%; thus far in 2022, it is 29%.



# Thank You

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Cvent  
3-D Cruise Partners

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**cvent**