

▶ **Attendee Preferences for Incentive Travel:
How the Right Destinations and Good Program Design Boost Employee
Motivation**

May 2023

▶ Survey Overview

- For the third straight year, the IRF conducted a study that examines incentive travel program participant preferences to determine the most motivating program design and destinations.
- This year, the study has evolved to include more data on experience design to complement the focus on destinations that have been the primary emphasis of the previous two iterations of the study.
- The current study also includes some questions directed toward participants who previously visited a popular destination to assess their interest in returning and recommending the destination as an incentive award trip.

- ✓ 400 survey respondents
- ✓ Employed full-time in a sales role
 - ✓ Eligible for an incentive travel award sometime within the past three years
 - ✓ 21+ years of age
 - ✓ Cannot be self-employed, an independent contractor, or a temporary employee
- ✓ Panel supplied sample
- ✓ Approximately 10-minute survey

- **43% of survey participants reported they won an incentive travel award sometime within the past three years.**
- **73% of these awards were for trips within North America; 27% were international trips**

▶ Key Findings: Sample Characteristics

- There were a few notable differences between the 2022 and 2023 sample which should be kept in mind when evaluating trends. These differences may or may not be relevant but will be noted in cases where they may have influenced the data trends.
 - The 2022 study was comprised of 38% salespersons who worked in the broad retail sector. In 2023, the percentage of retail participants in the study was cut in half to 18%.
 - The sample was spread more evenly throughout other industries, with increased representation in the manufacturing/industrial, health and medicine, and education industries in particular.
 - A notable sample shift from 2022, is the reduction of married respondents from 65% down to 39%.
 - This corresponds with an increase in the percentage of respondents with no children in the home from 35% to 47%.
 - There was an increase in the percentage of those 26 years and under (Gen Z) from 9% to 25%.
 - This indicates the growing presence of Gen Z in the salesforce and as incentive award participants.

► Industries in Which the Survey Respondents are Employed

Industry	2021 Percent	2022 Percent	2023 Percent
Retail/Wholesale	22%	38%	18%
Manufacturing/Industrial	13%	4%	9%
Banking/Financial Services/Insurance	12%	12%	11%
IT/Technology	9%	12%	13%
Professional Services	7%	6%	9%
Automotive	6%	5%	6%
Entertainment/Media	5%	1%	3%
Health and Medicine	5%	2%	8%
Hospitality/Travel/Leisure	4%	4%	4%
Education	4%	2%	8%
Pharmaceutical	3%	3%	2%
Other	12%	10%	10%

▶ Sample Characteristics

Gender	2021 Percent	2022 Percent	2023 Percent
Male	54%	55%	52%
Female	46%	43%	46%

Marital Status	2021 Percent	2022 Percent	2023 Percent
Married	64%	63%	39%
Single	18%	24%	35%
Living with a partner	9%	8%	15%
Divorced/Separated	8%	3%	9%
Widowed	2%	<1%	3%

▶ Sample Characteristics

Children Living in Household	2021 Percent	2022 Percent	2023 Percent
Have children under 5 living at home	20%	19%	19%
Have children between 5-11 living at home	24%	36%	23%
Have children between 12-18 living at home	24%	21%	18%
Have children over the age of 18 living at home	9%	4%	6%
Have no children living at home	44%	35%	47%

Generation	2022 Percent	Percent 2023
Gen Z (21-26)	9%	25%
Millennials (27-42)	61%	47%
Gen X (43-58)	22%	22%
Boomers (59-75)	8%	7%

▶ Sample Characteristics

Household Income	2023 Percent
Under \$50K	22%
\$50K-\$100K	41%
\$101K-\$150K	23%
\$151K+	14%

Overall Appeal of Incentive Travel



▶ Key Findings: Overall Appeal

- The motivational appeal of group incentive travel has been exceptionally strong for the past three years.
 - 91% of respondents describe a group incentive travel experience as ‘very’ or ‘extremely’ motivating.
 - Only 2% do not find a group travel experience motivating at all.
 - Group travel is especially motivating for those 42 years and under (Millennials and Gen Z) which is a positive sign for the future of the incentive travel industry.
- While the appeal of group travel is exceptionally strong, the appeal of individual incentive travel is even greater.
 - 94% describe individual travel as ‘very’ or ‘extremely’ motivating, with less than 1% saying individual travel is ‘not motivating at all’.
 - Unlike group travel, individual travel is equally motivating to those over 42 years of age, as well as those 42 years of age and younger.
- Ninety-nine percent (99%) see ‘some’ or “a great deal of value’ associated with an incentive travel award.

▶ Key Findings: Overall Appeal

- While the data show that participants prefer the idea of an individual trip, the greater takeaway is the importance of integrating elements of a private trip into a group experience.
 - 74% preferred an individual experience, with 40% saying they ‘much prefer’ an individual experience.
 - Only 13% prefer a group experience, with only 6% saying they ‘much prefer’ a group experience.
- The primary reasons for preferring an individual experience were that the individual experience offers more privacy and flexibility, although these things can be arguably integrated into a group experience.
- Among the people who prefer the group experience, the primary reasons were being able to share activities with colleagues and having a group travel coordinator who takes care of everything.
- While people are far more likely to prefer an individual trip, group travel still has a high amount of motivational appeal among people who would rather go solo.
 - 88% of those that prefer individual travel describe a group travel experience as either ‘very’ or ‘extremely’ motivating.

▶ Overall Appeal of Group 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	2023
Extremely motivating	48%	57%	60%
Very motivating	32%	34%	31%
Somewhat motivating	19%	8%	8%
Not motivating at all	2%	1%	2%

▶ Overall Appeal of Group Incentive Travel by Age

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	21-42 years of age	43 years of age and older
Extremely motivating	64%	50%
Very motivating	29%	36%
Somewhat motivating	7%	10%
Not motivating at all	1%	4%

▶ Overall Appeal of Individual 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	2023
Extremely motivating	53%	61%	66%
Very motivating	31%	35%	28%
Somewhat motivating	14%	4%	6%
Not motivating at all	1%	<1%	<1%

▶ Overall Appeal of Individual Incentive Travel by Age

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	21-42 years of age	43 years of age and older
Extremely motivating	66%	65%
Very motivating	27%	30%
Somewhat motivating	7%	4%
Not motivating at all	1%	0%

▶ Perceived Value of Incentive Travel Awards

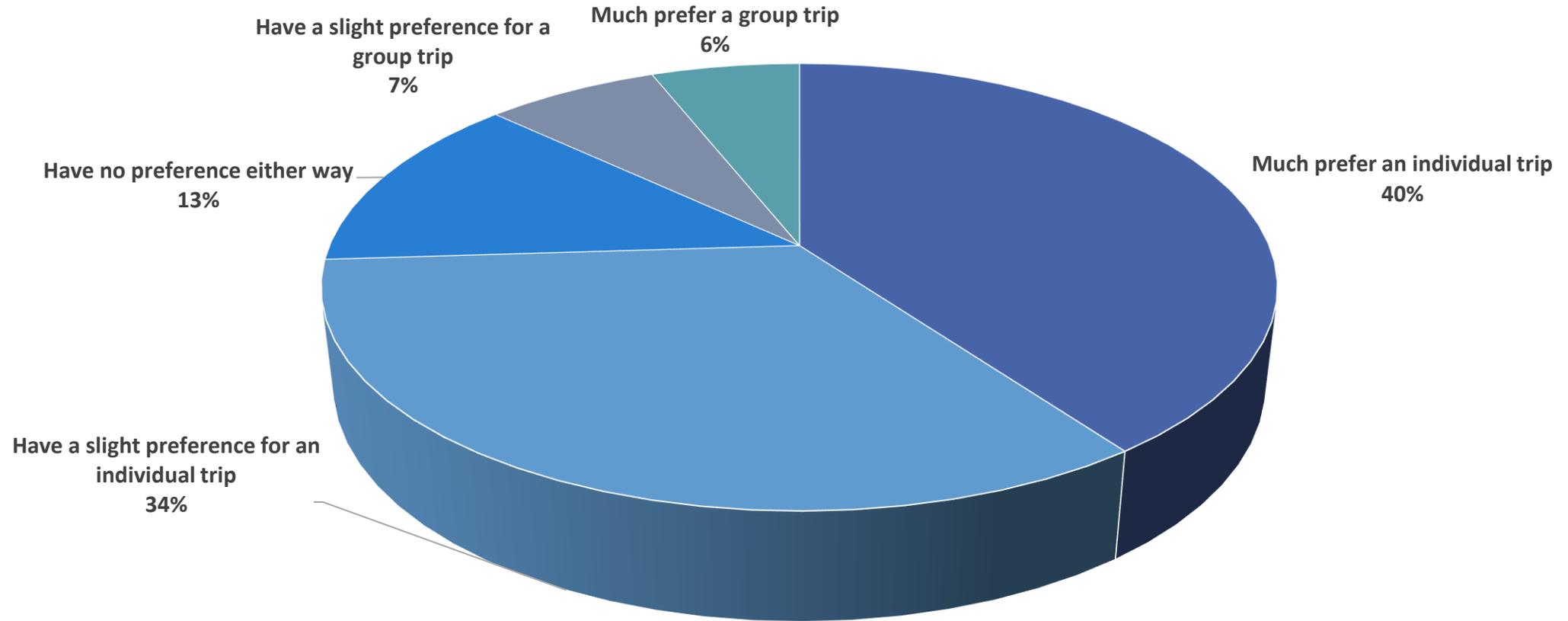
Do you see an incentive travel award to an appealing destination as having a great deal of value, some value, or little or no value to you?

Value of Incentive Travel	2021	2022	2023
A great deal of value	75%	80%	75%
Some value	24%	19%	24%
Little or no value	1%	<1%	1%

- Winners (80%) are more likely to place 'great value' on an incentive trip compared to non-winners (71%), although almost all participants see incentive trips as valuable.

Preference for Individual vs. Group Travel

If given the choice between a group incentive travel experience or an individual incentive travel experience, which would you prefer?



▶ Appeal of Group Travel Award Among Participants that Prefer an Individual Trip

Motivational Impact of Group Travel Award	Overall	Appeal Among those that Prefer a Group Trip	Appeal Among those that Prefer an Individual Trip
Extremely motivating	60%	81%	55%
Very motivating	31%	17%	33%
Somewhat motivating	8%	0%	10%
Not motivating at all	2%	2%	2%

► Reasons Why People Prefer Individual Travel

Reason	Percent
Like the privacy of an individual travel experience	61%
More flexibility with an individual travel experience	56%
Would rather not be forced to participate in group activities	35%
Would rather not be forced to interact with my colleagues	32%
Freedom to do what I want and not be on someone else's schedule	28%
Don't want to have to interact with my company's leaders on an incentive trip	21%
Other	<1%

Reasons Why People Prefer Group Travel

Reason	Percent
I enjoy sharing activities with my colleagues and their partners	64%
I like to have a group travel coordinator who takes care of everything for me	51%
In a group travel experience, the planner makes sure you enjoy the best things a destination has to offer	45%
It's a good chance to network with others	43%
I really like group activities	36%
No worries about getting to where I need to go	34%
I like working for a shared experience with my colleagues	32%

Priorities and Drivers of Positive Incentive Trip Experiences



▶ Key Findings: Priorities and Drivers of Incentive Trips

- The data are consistent with the 2022 study which shows the most important thing participants want in an incentive trip is being given ample time to relax.
- Being able to bring a guest along, having out-of-pocket expenditures covered and having luxury accommodations continue to be important priorities for participants.
- The data also show that having unique experiences and experiencing a unique culture has at least some importance to seven-out-of-ten.
- Going to a destination to which the participant has never been before is extremely important to a third of the participants, and at least somewhat important to seven-in-ten.
- The data show that this particular sample rated all of the previous attributes less important than the previous year's sample, but the areas that declined in importance the most from 2022 were having an upgraded airline seat and being recognized in front of one's peers.
- The data show that participants have a slight preference for staying at large well-known 5-star resorts compared to smaller 5-star boutique hotels, but both have a high amount of appeal to participants.
- Unique culinary activities have the most overall appeal, although other activities (e.g., cultural, spa/wellness, etc.) are not far behind in appealing to attendees.

► Priorities and Drivers of Positive Incentive Trip Experiences

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

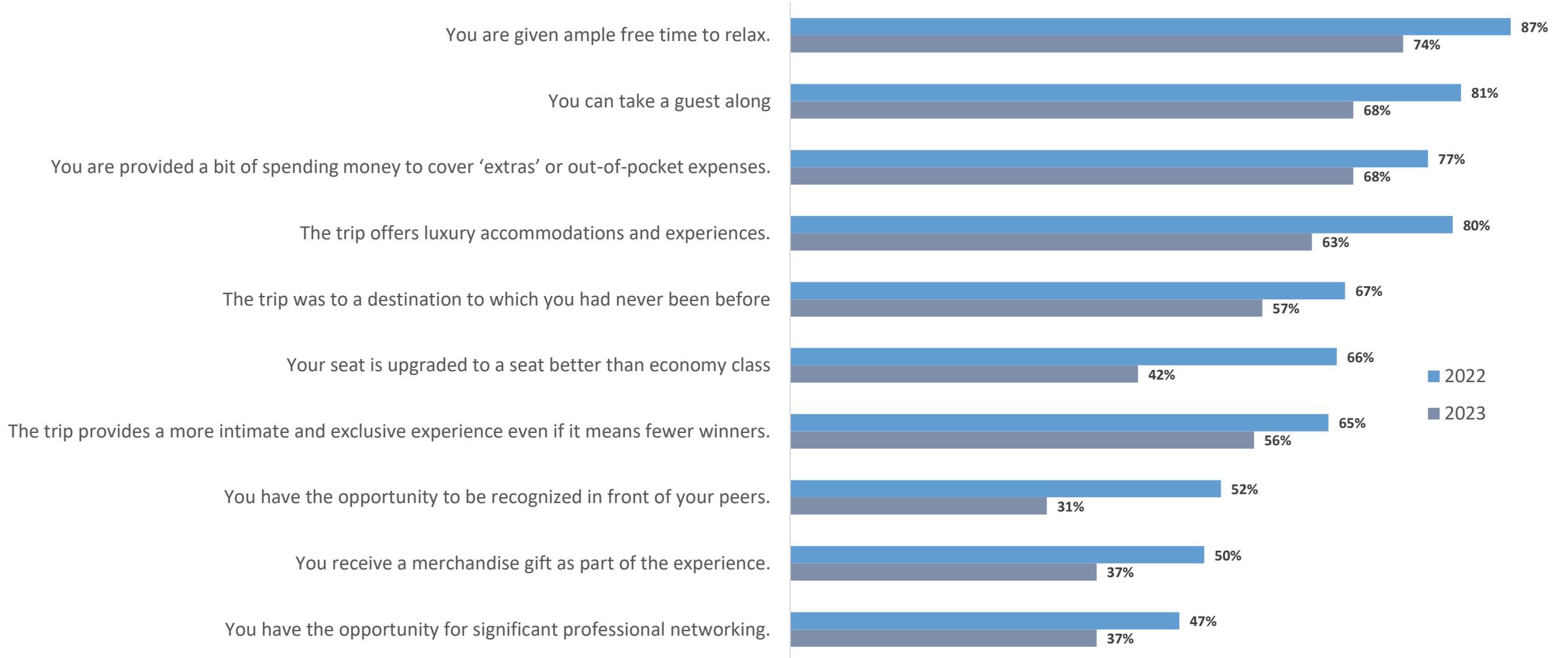
Area	% Extremely Important	'Somewhat' or 'Extremely' Important	'Somewhat unimportant' or 'Not important at all'	Net
You are given ample free time to relax.	50%	81%	7%	74%
You can take a guest along.	51%	76%	9%	68%
You are provided a bit of spending money to cover 'extras' or out-of-pocket expenses.	38%	76%	8%	68%
The trip gives you the opportunity to have unique experiences you could not otherwise have.	41%	76%	11%	65%
The trip offers luxury accommodations and experiences.	40%	72%	9%	63%
The trip gives you an opportunity to experience a unique culture.	36%	70%	12%	59%
The trip was to a destination to which you had never been before.	33%	70%	13%	57%

► 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.	32%	68%	12%	56%
Having an abbreviated travel time to arrive at the destination.	29%	60%	13%	47%
Your seat is upgraded to a seat better than economy class	29%	61%	19%	42%
You have the opportunity for significant professional networking.	31%	57%	20%	37%
You receive a merchandise gift as part of the experience.	24%	55%	18%	37%
You have the opportunity to be recognized in front of your peers.	28%	54%	23%	31%

▶ Net Change in Importance 2022 to 2023



► Preferred Features of Incentive Trips

How appealing or unappealing are each of the following as features or activities associated with an incentive award trip?

Feature	% Extremely Appealing	'Somewhat' or 'Extremely' Appealing	'Somewhat unappealing' or 'Not appealing at all'	Net
An incentive travel experience where you stay at a large well-known 5-Star hotel or resort	48%	80%	7%	74%
Opportunities to relax and disconnect	53%	78%	6%	72%
An incentive trip where you stay at an all-inclusive resort	47%	77%	6%	71%
An incentive travel experience where you stay in a smaller 5-Star boutique hotel	43%	76%	8%	68%
Opportunities for unique culinary activities	41%	76%	8%	68%
An individual travel experience where you stay in a private vacation residence with only your spouse/significant other.	49%	77%	10%	67%
Opportunities for cultural activities	36%	73%	8%	66%

▶ Preferred Features of Incentive Trips (continued)

How appealing or unappealing are each of the following as features or activities associated with an incentive award trip?

Feature	% Extremely Appealing	'Somewhat' or 'Extremely' Appealing	'Somewhat unappealing' or 'Not appealing at all'	Net
An incentive travel experience involving a flight	36%	72%	9%	63%
Opportunities for spa/wellness activities	41%	72%	10%	63%
An incentive trip where you stay in a private unit that is part of a larger resort.	38%	73%	12%	62%
Opportunities for outdoor activities	39%	71%	11%	61%
An incentive trip to the mountains or other remote area	34%	71%	11%	60%
Opportunities for 'thrill' activities	34%	69%	13%	57%
Opportunities for retail shopping	32%	66%	12%	54%

▶ Preferred Features of Incentive Trips (continued)

How appealing or unappealing are each of the following as features or activities associated with an incentive award trip?

Feature	% Extremely Appealing	'Somewhat' or 'Extremely' Appealing	'Somewhat unappealing' or 'Not appealing at all'	Net
An incentive trip to which you can drive	26%	58%	17%	42%
An incentive travel experience involving mingling with large groups of people	23%	55%	23%	32%

► Priority Features of Incentive Trips

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	% Ranked Top Three 2023	Average Ranking 2021	Average Ranking 2022	Average Ranking 2023
You can bring a guest/companion.	57%	48%	47%	3.93	4.37	4.43
All expenses are covered at all-inclusive or with spending money.	53%	47%	44%	4.26	4.33	4.50
The trip is to a destination you really find appealing.	49%	40%	41%	4.16	4.77	4.68
The trip offers 5-star luxury accommodations and experiences (e.g., hotels, dining, etc.)	41%	39%	40%	4.63	4.78	5.01
There are some great activities planned that you really enjoy.	22%	25%	25%	5.58	5.50	5.68

► Priority Features of Incentive Trips (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	% Ranked Top Three 2023	Average Ranking 2021	Average Ranking 2022	Average Ranking 2023
There are opportunities for excursions and sightseeing.	18%	24%	24%	5.87	5.66	5.77
The length of trip is most appropriate for your personal situation.	21%	26%	25%	5.80	5.48	5.79
There are significant opportunities for health and wellness opportunities.	12%	16%	22%	7.00	6.57	6.07
There is an opportunity to interact with the locals and experience the true authentic culture.	16%	18%	19%	6.42	6.44	6.32
There is an opportunity to participate in a community service project as part of the overall experience.	12%	15%	15%	7.35	7.10	6.74

► Priority Features of Incentive Trips (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 guest/companion.	23%	47%	22%	4.43
All expenses are covered at all-inclusive or with spending money.	18%	44%	19%	4.50
The trip is to a destination you really find appealing.	14%	41%	21%	4.68
The trip offers 5-star luxury accommodations and experiences (e.g., hotels, dining, etc.)	11%	40%	26%	5.01
There are some great activities planned that you really enjoy.	6%	25%	29%	5.68
There are opportunities for excursions and sightseeing	7%	24%	30%	5.77

▶ Priority Features of Incentive Trips (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
The length of trip is most appropriate for your personal situation.	6%	25%	30%	5.79
There are significant opportunities for health and wellness opportunities.	4%	22%	37%	6.07
There is an opportunity to interact with the locals and experience the true authentic culture.	6%	19%	41%	6.32
There is an opportunity to participate in a community service project as part of the overall experience.	5%	15%	47%	6.74

Length of Trip

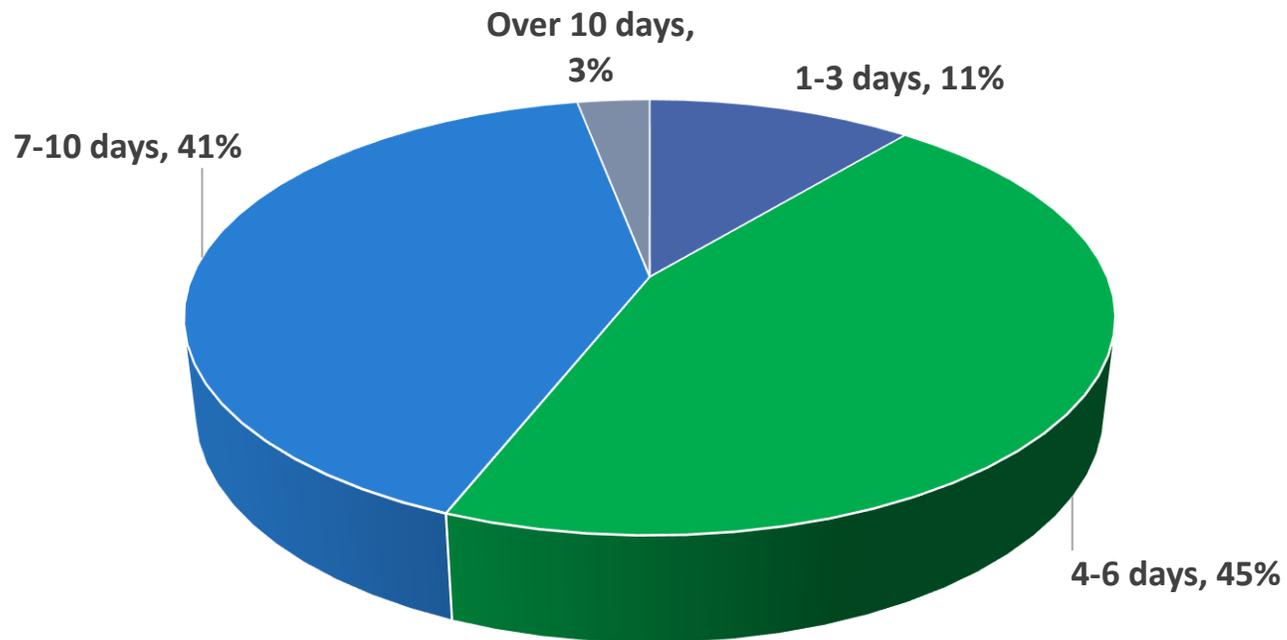


▶ Key Findings: Length of Trip

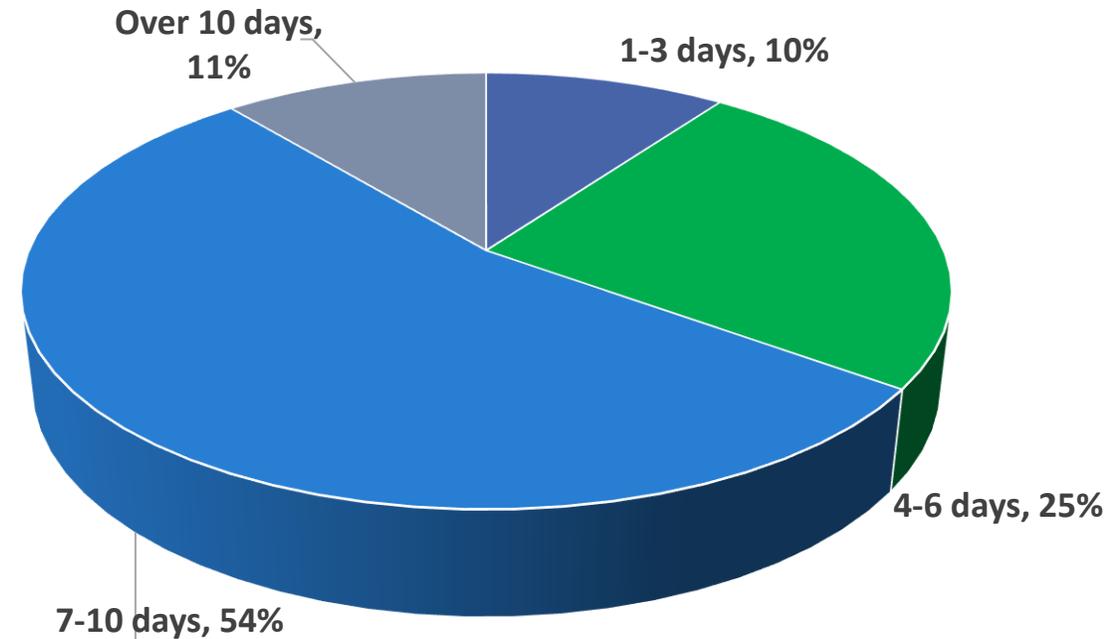
- When it comes to North American incentive trips, participants are closely divided on the ideal length of an incentive trip with 45% saying the ideal length is 4-6 days and another 41% indicating 7-10 days is the ideal length.
- For international trips, there is much more of a consensus, with 54% saying 7-10 days represents an ideal length.
 - The Cvent data shows that most trips (79%) last between 4-6 days.
- The data also indicate that two-thirds (66%) extend their North American incentive trips.
 - A slightly higher percentage (70%) extend their international incentive trips.

▶ Ideal Length of Trip

What is the ideal length of an incentive trip?



Within North America



International Trip

▶ Event Data on Trip Length

- While the survey respondents are somewhat divided as to the ideal length of an incentive trip in North America, nearly eight-in-ten (79%) of incentive trips last between 4-6 days.
- While 44% of participants felt the ideal length of a trip should exceed 6 days, only 10% of trips are longer than 6 days in length.
- The data show, however, that fewer trips are planned between 1-3 days than in the past, lengthening most incentive trips to at least 4-6 days.

Event Duration	2019	2020	2021	2022	2023
1-3 Days	21%	13%	13%	17%	11%
4-6 Days	68%	77%	72%	72%	79%
7-13 Days	10%	10%	14%	10%	9%
14+ Days	1%	1%	1%	1%	1%

▶ Percentage of Recent Winners that Extended their Trips

(Asked of recent winners) During your most recent incentive trip, did you extend your trip, either before or after the official start or end of the incentive award trip?

Extended/Did Not Extend	Total	North America Trip	International Trip
No, did not extend either before or after the trip	34%	36%	30%
Yes, extended before the trip	34%	36%	30%
Yes, extended after the trip	17%	12%	30%
Yes, extended both before and after the trip	14%	15%	11%



Spotlight on Cruising



▶ Key Findings: Cruises

- Cruising has made a VERY strong comeback.
 - Data provided by 3-D Cruise partners shows that quotes were up by 76% in 2022 compared to 2019—prior to the pandemic.
 - At the current rate, 2023 quotes projected over a full year, would be up 55% from 2022.
- Overall, attitudes toward cruising are very positive.
- Seven-in-ten agree that a cruise ship provides all the comforts of a luxury hotel and that an ocean cruise trip to a desirable destination would be extremely motivating as an incentive travel award.
 - More importantly, 68% agree that cruise ships provide a safe and secure environment, with only 15% disagreeing.

► Attitudes Toward Cruising

Please indicate how much you agree or disagree with the following statements.

Statement	% Strongly Agree	'Somewhat' or 'Strongly Agree'	'Somewhat' or 'Strongly Disagree'	Net
A cruise ship provides all the comforts of a luxury hotel.	38%	71%	12%	+59%
An ocean cruise trip to a desirable destination would be extremely motivating as an incentive travel award.	39%	71%	15%	+56%
A river cruise to a desirable destination would be extremely motivating as an incentive travel award.	32%	69%	14%	+55%
Cruise ships provide a safe and secure environment.	37%	68%	15%	+53%
I would prefer to explore multiple ports of call internationally by cruise as opposed to one international destination at hotel.	34%	65%	15%	+50%
The cruise experience itself is a desirable destination regardless of where the cruise is scheduled to go.	38%	65%	17%	+48%

► Cruise Line Bookings

Destination	Number of Quotes 2019	Number of Quotes 2020	Number of Quotes 2021	Number of Quotes 2022	Number of Quotes 2023 (through 3-6-23)
Caribbean	273 (45%)	206 (37%)	211 (35%)	458 (42%)	133 (45%)
Europe (Mediterranean)	108 (18%)	121 (21%)	120 (20%)	316 (30%)	65 (22%)
River	99 (16%)	128 (23%)	86 (14%)	128 (12%)	40 (14%)
Alaska	69 (11%)	56 (10%)	94 (16%)	114 (10%)	40 (14%)
Other, includes Expedition (Antarctica, Galapagos, Arctic), Hawaii, Tahiti	54 (9%)	53 (9%)	93 (15%)	62 (6%)	16 (5%)
Total	603	564	604	1064	294

Focus on Destinations



▶ Key Findings: Destinations

- Consistent with the positive data specific to cruise experiences, participants ranked cruise experiences 3rd overall as their preferred type of destination experience, behind beach/sunshine and adventure travel destinations.
 - Two years ago, cruise experiences were rated last (12th) in the ranked choice exercise showing how far attitudes toward cruising have come.
 - Interestingly, 'large metropolitan areas' and 'smaller cities' were rated lowest in destination experience rankings suggesting the type of destination experience is more important than the geographic location itself.

► Destination Features

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	% Ranked Top Three 2022	Average Ranking 2021	Average Ranking 2022	Average Ranking 2023
Beach/sunshine	55%	55%	48%	4.11	4.16	4.69
Adventure travel	32%	37%	31%	5.54	5.56	5.59
Cruise	18%	27%	33%	7.79	6.63	6.21
Mountains	32%	22%	24%	5.81	6.42	6.33
Cultural importance	21%	24%	22%	6.54	6.51	6.63
Historical location	29%	20%	21%	5.88	6.73	6.64
Wooded/nature area	22%	16%	20%	6.50	7.00	6.72
Wellness spa	16%	26%	20%	7.55	6.45	6.88
Primarily English-speaking	25%	16%	23%	6.46	7.33	6.94
Shopping	18%	22%	23%	7.28	6.97	6.97

► Destination Features

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	% Ranked Top Three 2022	Average Ranking 2021	Average Ranking 2022	Average Ranking 2023
Shopping	18%	22%	23%	7.28	6.97	6.97
Large metropolitan area	17%	22%	21%	7.48	6.65	6.99
Smaller city	15%	12%	16%	7.05	7.58	7.42

► Destination Features

Destination Feature	Most preferred by...	Less preferred by...
Beach/sunshine	Previous award winners, marrieds; those with kids under 18 at home	HH income \$100K or less; those under 42 years of age
Adventure travel	Gen Z	Marrieds; Gen X
Cruise	Previous award winners, those with kids under 18 at home; Millennials	Those making \$50K or less or more than \$150K
Mountains	Those over 42 years of age	Those making \$50K or less; Previous award winners
Cultural importance	Previous award winners, Singles, Gen Z	Marrieds
Historical location	Those over 42 years of age, HH income \$101K+	Those under 42 years of age
Wooded/nature area	Marrieds, Gen X	Previous award winners, Millennials; Singles
Wellness spa	Singles, Millennials, those making over \$150K	HH income between \$101K-\$150K
Primarily English-speaking	No significant differences among key groups	NA
Shopping	Singles; those under 42 years of age	Households over \$150K; those 42 years of age or older
Large metropolitan area	Singles	Gen X; HH income between \$51K-\$100K
Smaller city	Gen Z	Households between \$51K-\$100K

▶ Key Findings: Previous Experience with Destinations

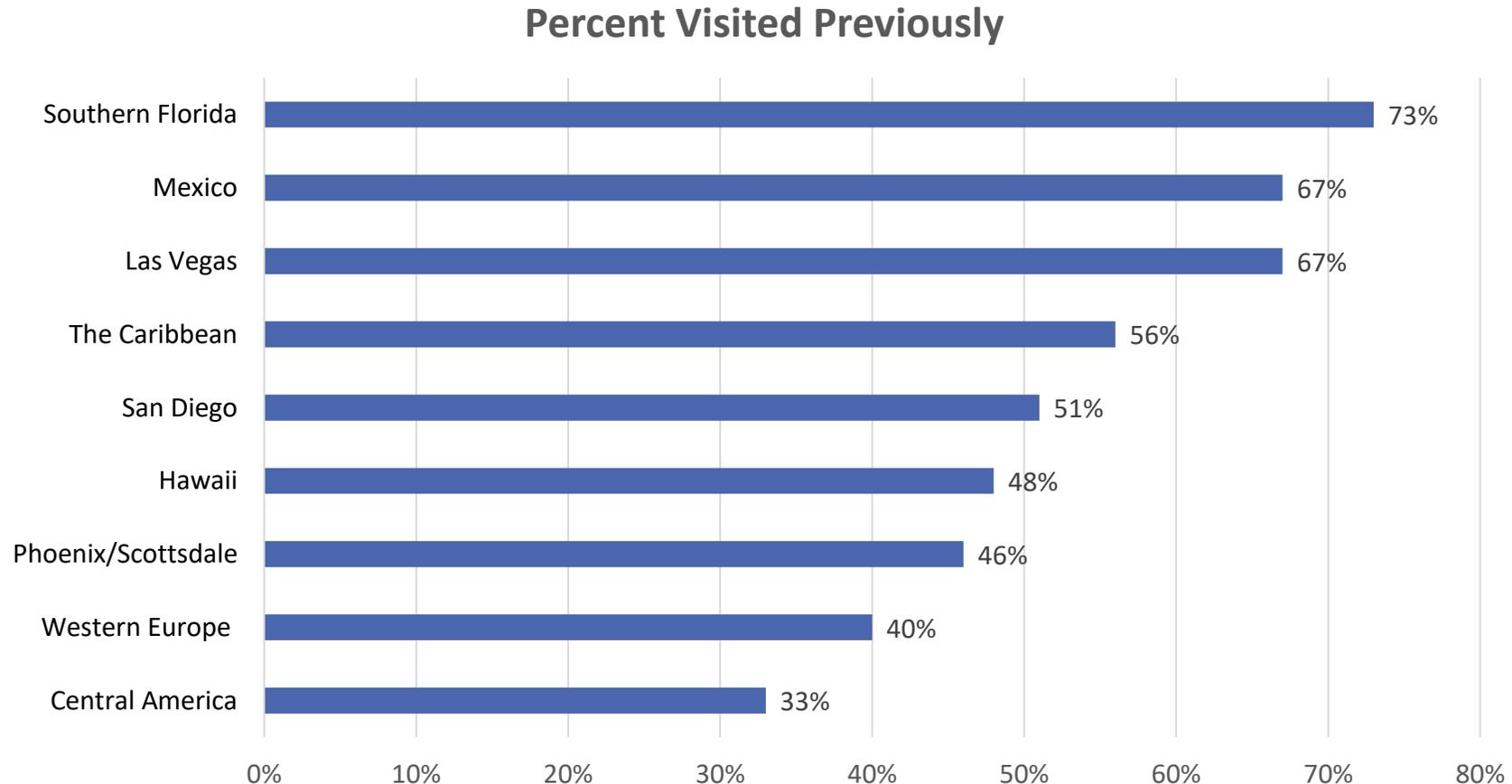
- A new section was added to the 2023 study in which participants were asked about their previous experience with popular incentive destinations.
- In addition to being asked whether they had previously visited the destination, previous visitors were asked how interested they were in returning and whether they would recommend the destination as an incentive travel award trip.
 - Southern Florida (73%), Mexico (67%), Las Vegas (67%) were the most previously visited destinations; Central America (33%) and Western Europe (40%) were the least visited.
 - Mexico had the highest percentage (21%; 14% of the total sample) that recently visited on an incentive trip award.
 - Visitors to the Caribbean indicated the highest amount of interest in returning for a leisure trip (87%), with Hawaii (84%), Western Europe (84%) and Las Vegas (82%) close behind.
 - Mexico was the destination in which people were least interested in returning for leisure (66%).

▶ Key Findings: Previous Experience with Destinations

- The Caribbean was the destination to which previous visitors were most likely to recommend as an incentive trip (80%).
 - While Hawaii is consistently the destination which people indicate is the destination they would most prefer as an incentive destination, it ended up behind Las Vegas (74%) and Western Europe (73%) as the place previous visitors would most likely recommend as an incentive trip with 72%.
 - Mexico, Central America, and Phoenix/Scottsdale are the destinations previous visitors would be most likely to recommend with 63% each.

▶ Previous Experience with Destinations

For each of the following destinations, please indicate whether you have previously visited, either as an incentive travel experience, or for another reason.



Reason for Most Recent Visit

*What was the primary reason for your most recent visit to...?**

Destination	Incentive Trip	Leisure Trip	Business Trip	Combination of Business and Leisure
Southern Florida	9% (7%)	50% (36%)	22% (16%)	20% (14%)
Mexico	21% (14%)	57% (38%)	13% (9%)	10% (7%)
Las Vegas	9% (6%)	49% (33%)	20% (13%)	23% (15%)
The Caribbean	14% (8%)	59% (33%)	13% (7%)	15% (8%)
San Diego	10% (5%)	41% (21%)	28% (14%)	22% (11%)
Hawaii	13% (6%)	45% (21%)	16% (8%)	26% (12%)
Phoenix/Scottsdale	9% (4%)	45% (21%)	27% (12%)	19% (9%)
Western Europe	9% (4%)	38% (15%)	29% (12%)	24% (10%)
Central America	8% (3%)	41% (14%)	30% (10%)	21% (7%)

* Percent of total sample in parentheses

▶ Likelihood to Return Based on Prior Experience

How interested would you be in returning to....for leisure?

Destination	% A Great Deal of Interest	'Some' or a 'Great Deal' of Interest	'Little' or 'No Interest' in Returning	Net
The Caribbean	58%	87%	13%	+74%
Hawaii	56%	84%	16%	+68%
Western Europe	44%	84%	16%	+68%
Las Vegas	49%	82%	18%	+64%
Southern Florida	43%	80%	20%	+60%
San Diego	43%	80%	20%	+60%
Phoenix/Scottsdale	36%	72%	28%	+44%
Central America	39%	70%	30%	+40%
Mexico	33%	66%	34%	+32%

▶ Likelihood to Recommend Based on Previous Experience

Based on your experiences traveling to...how likely would you be to recommend ...as an incentive travel award destination?

Destination	% Extremely Likely	'Somewhat' or 'Extremely' Likely	'Somewhat Unlikely' or 'Not Likely at All'	Net
The Caribbean	50%	80%	9%	+71%
Las Vegas	46%	74%	14%	+61%
Hawaii	47%	72%	14%	+58%
Western Europe	43%	73%	15%	+58%
Southern Florida	38%	71%	17%	+54%
San Diego	36%	67%	17%	+50%
Mexico	30%	63%	19%	+44%
Central America	36%	63%	21%	+42%
Phoenix/Scottsdale	32%	63%	23%	+40%

► Summary of Previous Visitor Feedback

Destination	Incidence of Previous Visits	Interest in Returning	Likelihood to Recommend
The Caribbean	High	High	High
Las Vegas	High	High	High
Hawaii	Low	High	High
Western Europe	Low	High	High
Southern Florida	High	High	High
San Diego	High	High	Low
Mexico	High	Low	Low
Central America	Low	Low	Low
Phoenix/Scottsdale	Low	Low	Low

Destination Preferences



▶ Key Findings: Destination Preferences

- For the third straight year, **Hawaii** was the clear winner as the place program participants would most like as an incentive award.
 - Preference shares for **Hawaii** were virtually unchanged for all three years of the study.
 - Both the **Western United States** and the **Caribbean** have consistently been among the Top Three preferred destinations for all three years of study.
 - Preference share for the **Caribbean** slipped a bit this year but was similar to the 2021 study when it was initially the second most preferred incentive destination behind Hawaii.
 - The **Eastern United States** made it's first appearance as a top four destination, making significant gains.
 - While **Western Europe** was still a Top 6 destination, it was the biggest 'decliner' in the study.
 - Another large 'decliner' was **Alaska**, which was the 5th most popular destination in 2021, but is now ranked 12th in preference.
 - While it is still a second-tier incentive destination, the **Midwest United States** was the biggest riser in 2023.

► 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)

► Destination Rankings: Top Tier

Destination	Comparison to 2022
#1 Hawaii	Top ranked destination for the 3 rd straight year, with no change in preference or ranking
#2 Western United States (e.g., California, Las Vegas)	Moved up one ranking to #2 in 2023, although preference share did not change much from 2022.
#3 Caribbean (incl Puerto Rico)	Dropped one rank in 2023 but still ranked very high. Preference share decreased in 2023 (+39) but still similar to 2021 (+37)
#4 Eastern United States (e.g., New York, Maine, Vermont, Massachusetts)	Improved rank from #7 to #4, significantly increasing preference share
#5 Southwest United States (e.g., Arizona, New Mexico, Texas)	Moved up one rank from #6 to #5, slightly increasing preference share

► Destination Rankings: 2nd Top Tier

Destination	Comparison to 2022
#6 Western Europe (Germany, France, Italy)	Declined in rank from #4 to #6, with a decline in preference share as well
#7 Southern United States (e.g., Florida, Louisiana)	Declined in rank from #5 to #7, although no significant movement in preference share
#8 Central America (e.g., Costa Rica, Panama)	Increase in rank from #11 to #8, although no significant movement in preference share
# 9 Canada (e.g., Ontario, British Columbia, Quebec)	Up from #10 in 2022, but slight decline in preference share
#10 South America (Chile, Brazil)	Up from #12 in 2022, slight increase in preference share

► Destination Rankings: 3rd Tier Destinations

Destination	Comparison to 2022
#11 Mexico	Down from #9 in 2022; after big increase in preference share last year, some decline in 2023
#12 Alaska	Declined in rank from #8, significant decline in preference share from 2022
#13 Midwest United States (e.g., Chicago)	Increased from #16 to #13, with the largest increase in preference share of any of the destinations
#14 Middle East (e.g., Dubai, Egypt)	No change in rank, slight decline in preference share
#15 Northeast Asia (e.g., Hong Kong, Macau)	Slight increase in rank from #17 to #15, slight increase in preference share
#16 Oceania (e.g., Polynesia, Micronesia)	Decrease in rank from #13, continuing decline in preference share
#17 Southeast Asia (e.g., Singapore, Vietnam)	Increase in rank from #20, slight increase in preference share

► Destination Rankings: Least Preferred Destinations

Destination	Comparison to 2021
#18 Emerging Europe (e.g., Hungary, Romania)	Up one rank, but no shift In preference share
#19 South Asia (e.g., India, Maldives)	Down from #15, slight decline in preference share
#20 Southern Africa	Up one rank, slight increase in preference share
#21 North Africa	Down from #18, slight decline in preference share
#22 East Africa (e.g., Kenya, Madagascar)	Also ranked #22 in 2021 and 2022, slight increase in preference share
#23 West Africa (e.g., Nigeria, Senegal)	Also ranked #23 in 2021 and 2022, increase in preference share but still consistently the least preferred destination

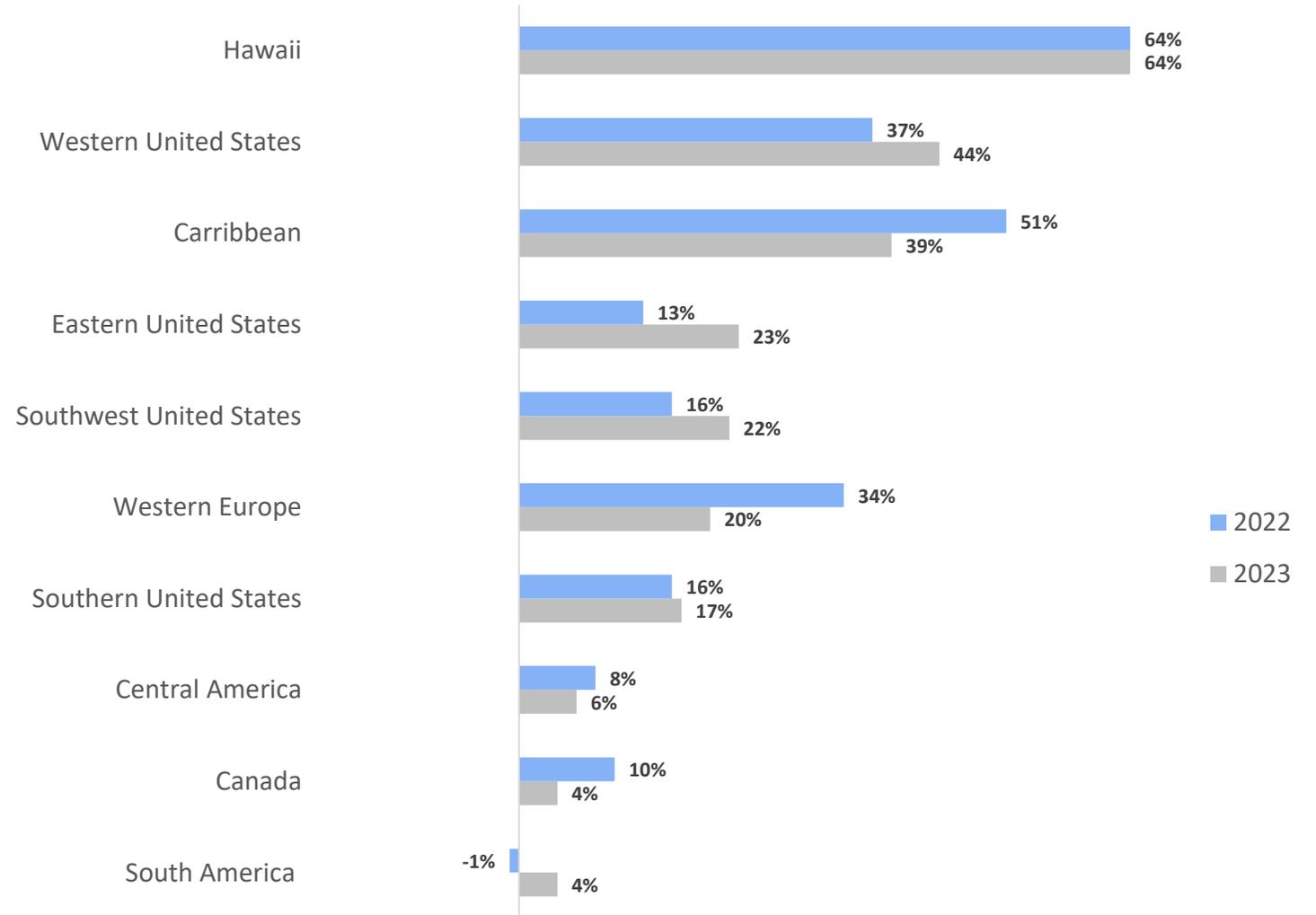
► Biggest 'Risers' from 2022 (based on Net of Top 7-Bottom 7)

Destination	Net increase
Midwest United States (e.g., Chicago)	+14%
West Africa (e.g., Nigeria, Senegal)	+13%
Eastern United States (e.g., New York, Maine, Vermont, Massachusetts)	+10%
Southeast Asia (e.g., Singapore, Vietnam)	+9%
Northeast Asia (e.g. Hong Kong, Macau)	+7%
Southern Africa	+7%
East Africa (e.g., Kenya, Madagascar)	+7%
Southwest United States (e.g., Arizona, New Mexico, Texas)	+6%

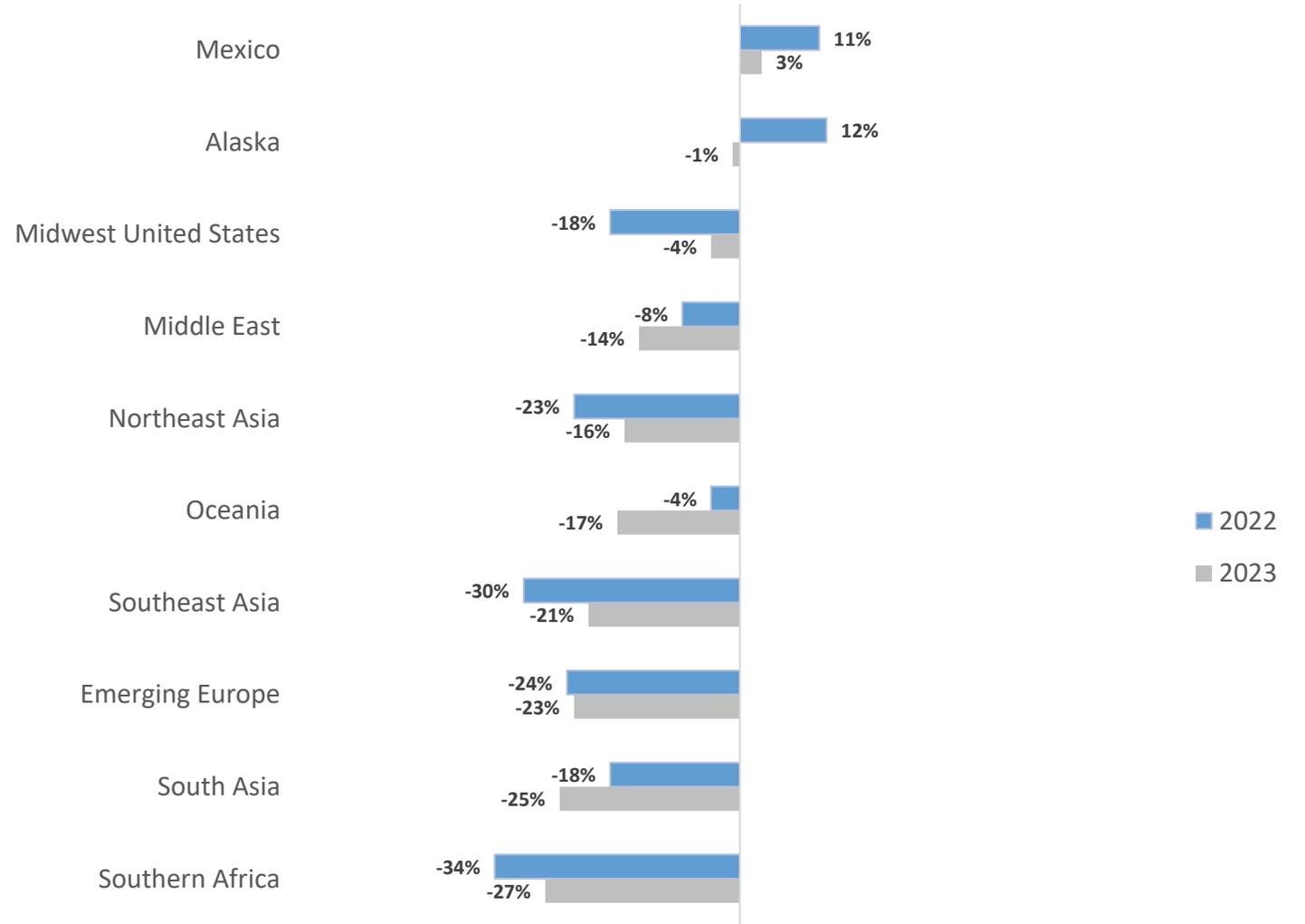
► Biggest 'Decliners' from 2022 (based on Net of Top 7-Bottom 7)

Destination	Net decrease
Western Europe (Germany, France, Italy)	-14%
Alaska	-13%
Oceania (e.g., Polynesia, Micronesia)	-13%
Caribbean (incl Puerto Rico)	-12%
Mexico	-8%
South Asia (e.g., India, Maldives)	-7%
Middle East (e.g., Dubai, Egypt)	-6%
Canada (e.g., Ontario, British Columbia, Quebec)	-6%

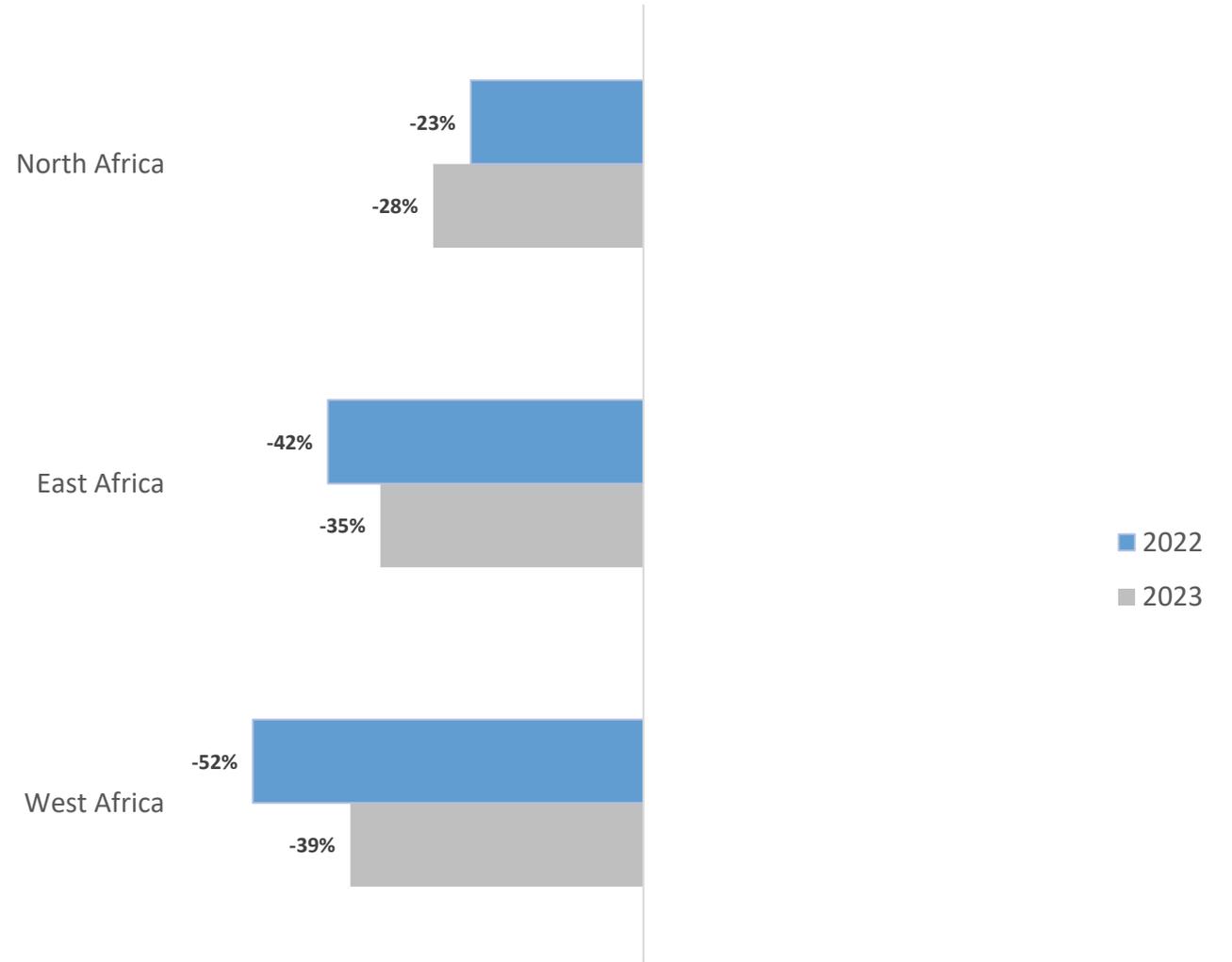
2022-2023 Comparisons in Destination Preferences (Top 7/Bottom 7)



► 2022-2023 Net Change in Destination Preferences (Top 7/Bottom 7)



▶ 2022-2023 Net Change in Destination Preferences (Top 7/Bottom 7)



▶ 2023 Destination Preferences--Ranked

Region	Top 3	Top 7	Bottom 3	Bottom 7	Top/Bottom 3 Net	Top/Bottom 7 Net
Hawaii	43%	73%	4%	10%	40%	64%
Western United States (e.g., California, Las Vegas)	43%	65%	9%	17%	33%	48%
Caribbean (incl Puerto Rico)	28%	57%	11%	18%	17%	39%
Eastern United States (e.g., New York, Maine, Vermont, Massachusetts)	21%	48%	15%	26%	7%	23%
Southwest United States (e.g., Arizona, New Mexico, Texas)	26%	47%	14%	25%	13%	22%
Western Europe (Germany, France, Italy)	23%	42%	8%	23%	15%	20%
Southern United States (e.g., Florida, Louisiana)	24%	45%	15%	29%	9%	17%
Central America (e.g., Costa Rica, Panama)	8%	32%	10%	27%	-2%	6%
Canada (e.g., Ontario, British Columbia, Quebec)	8%	34%	14%	30%	-6%	4%
South America (Chile, Brazil)	6%	24%	8%	21%	-2%	4%
Mexico	11%	35%	18%	32%	-7%	3%
Alaska	12%	32%	19%	32%	-7%	-1%
Midwest United States (e.g., Chicago)	11%	31%	21%	35%	-10%	-4%
Middle East (e.g., Dubai, Egypt)	6%	23%	14%	36%	-8%	-14%
Northeast Asia (e.g. Hong Kong, Macau)	3%	14%	11%	29%	-7%	-16%
Oceania (e.g., Polynesia, Micronesia)	5%	20%	14%	37%	-9%	-17%
Southeast Asia (e.g., Singapore, Vietnam)	5%	15%	14%	35%	-9%	-21%
Emerging Europe (e.g., Hungary, Romania)	5%	15%	11%	38%	-6%	-23%
South Asia (e.g., India, Maldives)	5%	13%	11%	39%	-7%	-25%
Southern Africa	3%	9%	12%	36%	-9%	-27%
North Africa (e.g., Morocco)	2%	10%	14%	38%	-12%	-28%
East Africa (e.g., Kenya, Madagascar)	2%	10%	15%	44%	-13%	-35%
West Africa (e.g., Nigeria, Senegal)	2%	8%	22%	48%	-20%	-39%

▶ 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%

Event Booking Data



▶ Key Findings: Cvent Booking Data

- Cvent bookings have trended toward Mexico and the Caribbean in 2022-23.
 - Four of the five top booked destinations in 2023 are located in Mexico.
 - Mexico destinations comprise 7 of the top 20 most booked 2023 destinations. Playa del Carmen (#1), San Jose del Cabo (#2), Cancun (#3), Cabo San Lucas (#5), Los Cabos (#9), Riviera Maya (#12), and Puerto Vallarta (#17).
 - Three of the Mexican destinations are the biggest 'risers' since 2021. These include Riviera Maya (up 14 spots since 2021), Puerto Vallarta (up 13 spots), and Cancun (up 7 spots.)
- Nine of the remaining Top 20 most booked 2023 destinations are located in the Caribbean, led by Nassau in the Bahamas at #4.
 - Nassau was the #1 destination from 2019-2021 and was #2 in 2022.
 - There was a significant increase in booking among several Caribbean destinations, led by Providenciales (up 13 spots since 2021.)
- Puerto Rican destinations, San Juan and Rio Grande have both been steady risers over the past few years, tying for the 10th rank in 2023.

▶ Key Findings: Cvent Booking Data

- While Hawaii remains the overwhelming first preference of participants, Hawaiian bookings have continued to decline in 2022 and 2023.
 - Maui was ranked 5th in 2021, 8th in 2022, and 18th in 2023 (the only Hawaiian destination in the 2023 Top 20)
 - Honolulu was ranked 6th in 2021, 18th in 2022, and 27th in 2023
 - Kohala Coast was ranked 11th in 2021, 17th in 2022, and 21st in 2023

▶ Top Booked Destinations 2019-2023

2019	2020	2021	2022	2023
Nassau (Caribbean)	Nassau (Caribbean)	Nassau (Caribbean)	Playa del Carmen (Mexico)	Playa del Carmen (Mexico)
Playa del Carmen (Mexico)	Playa del Carmen (Mexico)	San Jose del Cabo (Mexico)	Nassau (Caribbean)	San Jose del Cabo (Mexico)
Grand Cayman (Caribbean)	San Jose del Cabo (Mexico)	Playa del Carmen (Mexico)	Cancun (Mexico)	Cancun (Mexico)
Guanacaste (Central America)	Palm Beach (Southern US)	Guanacaste (Central America)	San Jose del Cabo (Mexico)	Nassau (Caribbean)
Los Cabos (Mexico)	Honolulu (Hawaii)	Maui (Hawaii)	Cabo San Lucas (Mexico)	Cabo San Lucas (Mexico)
San Jose del Cabo (Mexico)	Maui (Hawaii)	Honolulu (Hawaii)	Scottsdale (Southwest US)	Punta Cana (Caribbean)
Cancun (Mexico)	Los Cabos (Mexico)	Cabo San Lucas (Mexico)	Miami Beach (Southern US)	Grand Cayman (Caribbean)
Palm Beach (Southern US)	Cancun (Mexico)	Scottsdale (Southwest US)	Maui (Hawaii)	Guanacaste (Central America)
Cabo San Lucas (Mexico)	Grand Cayman (Caribbean)	Grand Cayman (Caribbean)	Grand Cayman (Caribbean)	Los Cabos (Mexico)
Montego Bay (Caribbean)	Cabo San Lucas (Mexico)	Cancun (Mexico)	Punta Cana (Caribbean)	San Juan (Caribbean)
Punta Cana (Caribbean)	Guanacaste (Central America)	Kohala Coast (Hawaii)	Los Cabos (Mexico)	Rio Grande (Caribbean)
Riviera Maya ((Caribbean)	Scottsdale (Southwest US)	Los Cabos (Mexico)	Guanacaste (Central America)	Riviera Maya (Mexico)
Honolulu (Hawaii)	Punta Cana (Caribbean)	Montego Bay (Caribbean)	San Diego (Western US)	Montego Bay (Caribbean)
Maui (Hawaii)	Wailea (Hawaii)	Punta Cana (Caribbean)	San Juan (Caribbean)	Scottsdale (Southwest US)
Aruba (Caribbean)	Montego Bay (Caribbean)	Miami Beach (Southern US)	Rio Grande (Caribbean)	St. Thomas (Caribbean)
St. Thomas (Caribbean)	Miami Beach (Southern US)	St. Thomas (Caribbean)	Riviera Maya (Mexico)	Providenciales (Caribbean)
San Juan (Caribbean)	Kohala Coast (Hawaii)	Wailea (Hawaii)	Kohala Coast (Hawaii)	Puerto Vallarta (Mexico)
Rio Grande (Caribbean)	St. Thomas (Caribbean)	San Juan (Caribbean)	Honolulu (Hawaii)	Maui (Hawaii)
British West Indies (Caribbean)	San Diego (Western US)	San Diego (Western US)	Wailea (Hawaii)	Palm Beach (Caribbean)
Oranjestad (Caribbean)	Kapalua (Hawaii)	Rio Grande (Caribbean)	Miami (Southern US)	Miami Beach (Southern US)

► Biggest Risers 2021-2023

Destination	Market	2021 Rank	2022 Rank	2023 Rank	Rank Difference 2021 v. 2023
Riviera Maya	Mexico	26	16	12	+14
Providenciales	Caribbean	29	26	16	+13
Puerto Vallarta	Mexico	30	28	17	+13
Rio Grande	Puerto Rico	20	15	10	+10
Punta Cana	Caribbean	14	10	6	+8
San Juan	Puerto Rico	18	14	10	+8
Cancun	Mexico	10	3	3	+7
Aruba	Caribbean	28	27	22	+6
Palm Beach	Caribbean	23	24	19	+4
Los Cabos	Mexico	12	11	9	+3

► Biggest Decliners 2021-2023

Destination	Market	2021 Rank	2022 Rank	2023 Rank	Rank Difference 2021 v. 2023
Honolulu	Hawaii	6	18	27	-21
Maui	Hawaii	5	8	18	-13
Kohala Coast	Hawaii	11	17	21	-10
Wailea	Hawaii	17	19	26	-9
Hawaii	Hawaii	20	21	29	-9
Kapalua	Hawaii	22	25	29	-7
Scottsdale	Arizona	8	6	14	-6
Miami Beach	Florida	15	7	20	-5
San Diego	California	19	13	24	-5

Thank You!

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

3-D Cruise Partners
Cvent