



*Reference Deck:*  
**Incentive Travel Programs – Expectations and Challenges**

July 2023

---

# Methodology

Fielded a 15-minute on-line survey from June 2nd to June 13, 2023

- Used client and member lists from IRF and Questex
- Invitation originated from sponsor organizations
- The sample was an ID based link and, late-stage, an open link was used to get the sample.
- A modest incentive was used (\$25 gift)
- Data cleaning yielded a final sample size of 372 individuals





# Stakeholders

## Four Groups Are Identified



### Hotelier (n=92)

A professional working for a hotel and/or resort property; responsible for arranging and coordinating incentive travel.



### Tourism Board/ Convention/Visitors Bureau (n=19\*) \* Low sample size

A member of an organization that helps promote and secure leisure and business travel in a regional area.



### Destination Management Company (n=45)

A regional travel company responsible for helping to coordinate and secure local travel events (experiences) with regional transportation, recreation, food, and lodging facilities (event venues).

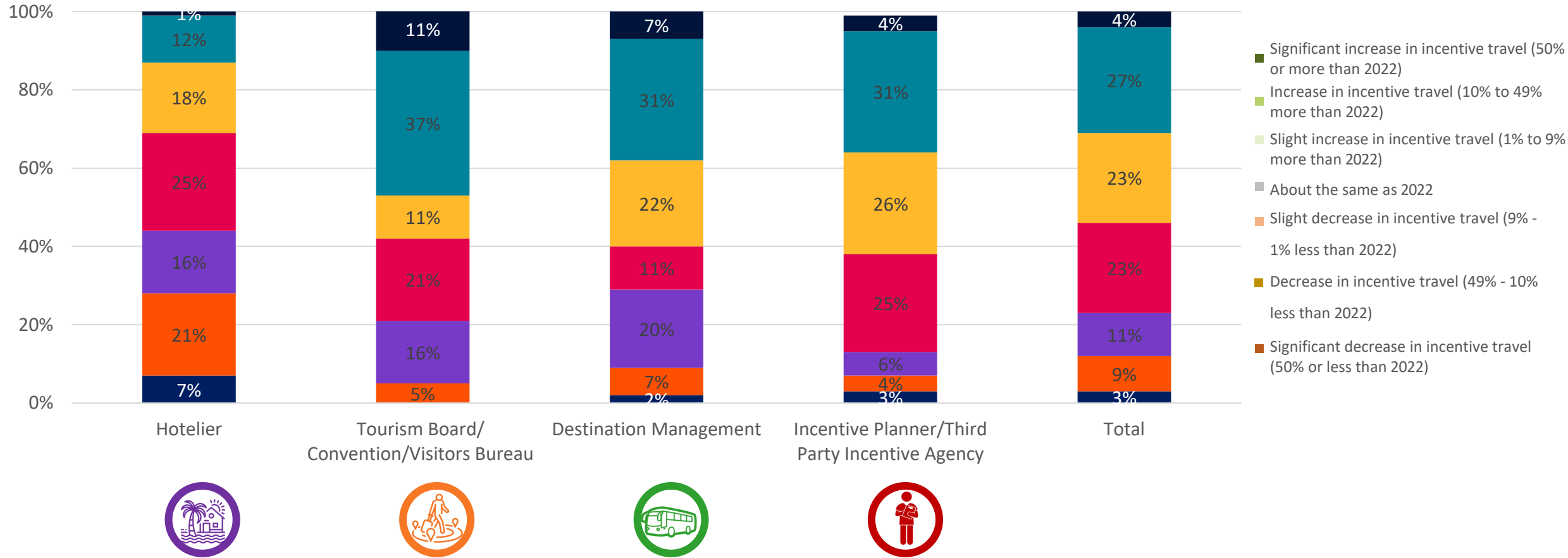


### Incentive Planner/ Third Party Incentive Agency (n=201)

A professional responsible for coordinating (the sourcing, management and execution of) incentive travel on behalf of a client organization

▶ Just over half (54%) of the industry think things are looking up for 2023 and beyond, with 4% saying incentive travel will increase by 50%. Incentive planners and Destination managers are more bullish with around 60% expecting a 10%+ increase in incentive travel spend

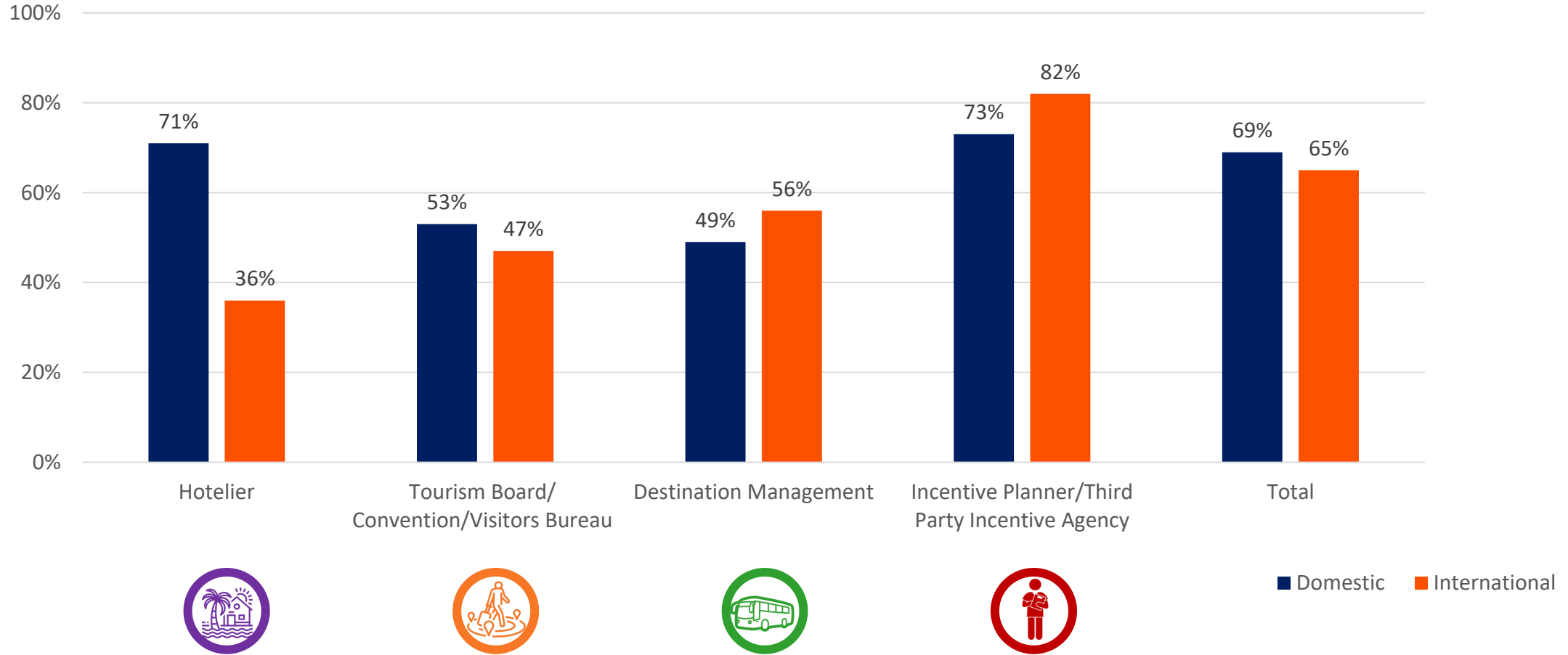
*For your business, what is the outlook for INCENTIVE TRAVEL for the next 18 months?*



\* Low sample size

Focus on the next 18 months is fairly consistent between domestic and international, Hoteliers being most focused on domestic travel

*What types of incentive travel will you focus on in the next 18 months? (Check all that apply)?*



\* Low sample size



Hoteliers

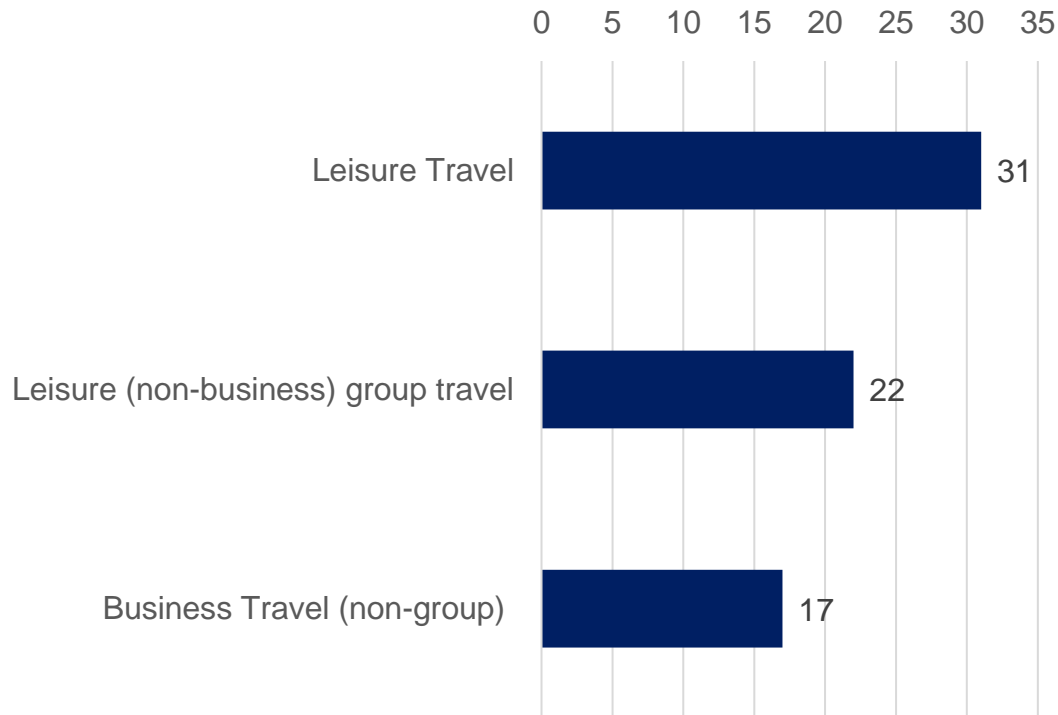
---



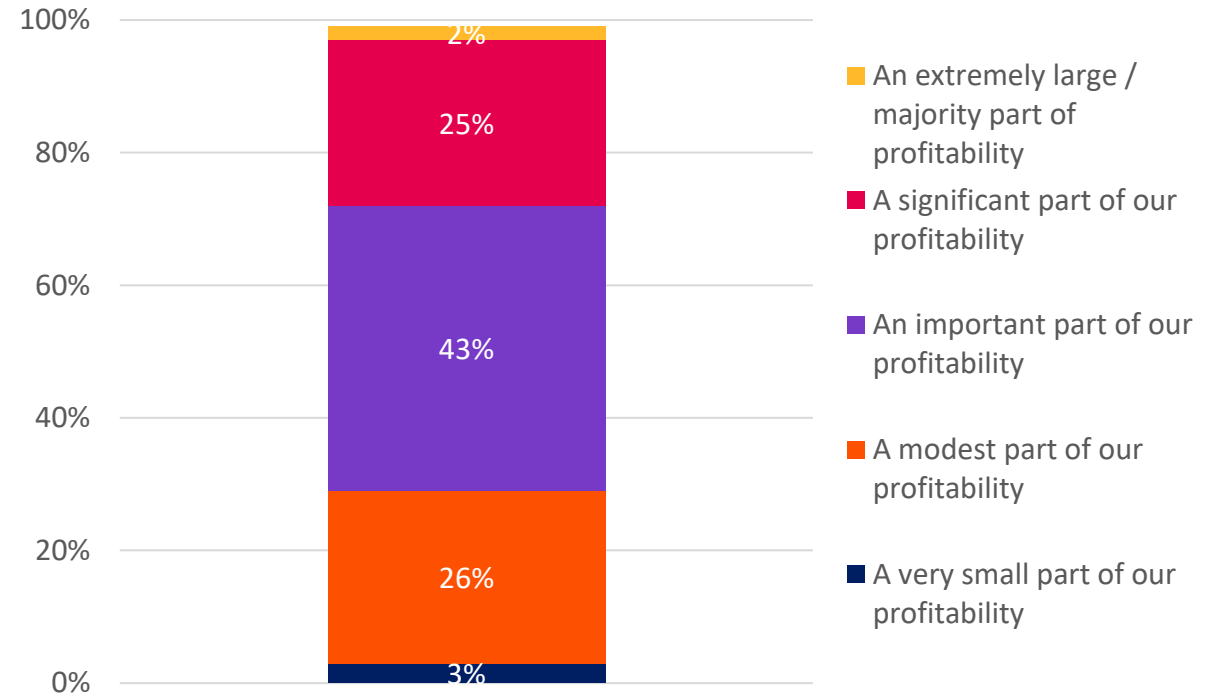
▶ Leisure travel is projected to make up around a third of revenue in the next 18 months. Over ¼ of Hoteliers indicate that Incentive travel is a significant or extremely large part of their organization's revenues & profitability

## Revenue Mix

What is your projected revenue mix of group, business, and leisure travel in the next 18 months? Mean



How important is incentive travel to your organization's revenue and annual goals?

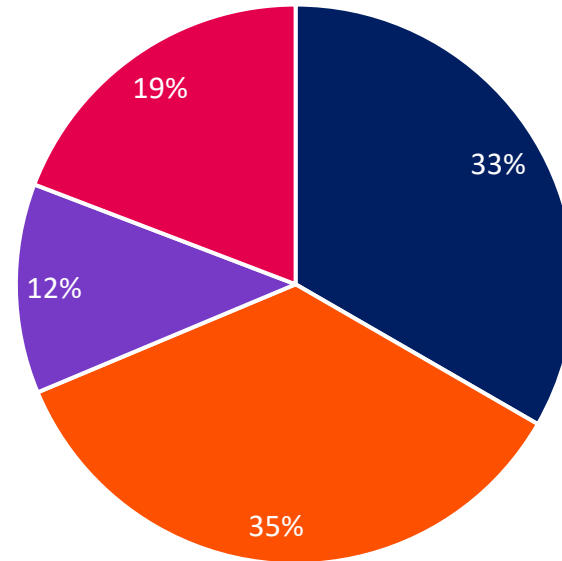




Hotellers' response time to a new RFP is fairly quick with two-thirds responding in a few days or less. About 1 in 5 take more than two weeks to respond.

## RFP Response Time

*What is the average number of business days from the time you receive an RFP for a group incentive travel program to submitting a full proposal, with rates, dates, and space?*



**Mean 16 days**

■ A day or two   ■ A few days   ■ A week to two weeks   ■ More than two weeks

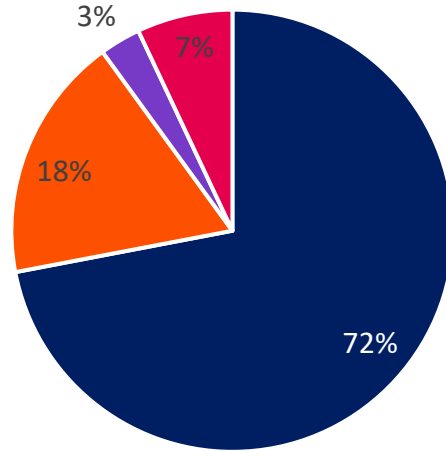




Over the next 18 months, there is an expected shift from daily housekeeping (which three-quarters of Hoteliers currently do) to housekeeping on a specific schedule, but not daily.

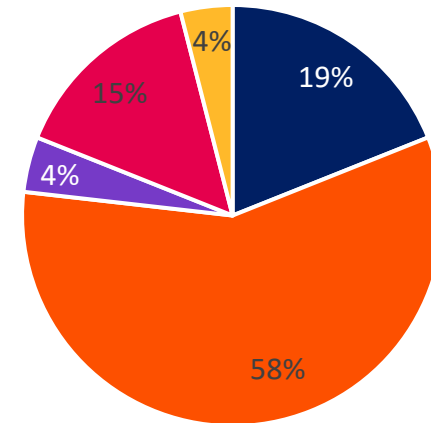
## Housekeeping

*Does your property currently offer housekeeping services?*



- Yes, daily housekeeping
- Yes, on a specific schedule, not daily
- On request only
- No, only between guests or upon checkout

*Do you plan to offer daily, scheduled, or on-request housekeeping in the next 18 months?*



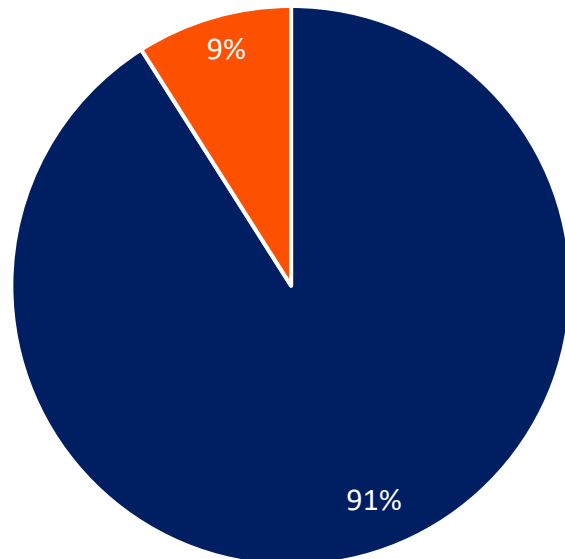
- Yes, daily housekeeping
- Yes, on a specific schedule, not daily
- On request only
- No, only between guests or upon checkout
- Not sure



Nearly all Hoteliers say that their food and beverage services are open with operating hours comparable to 2019 and 2 in 3 say that they plan further services in the next 18 months.

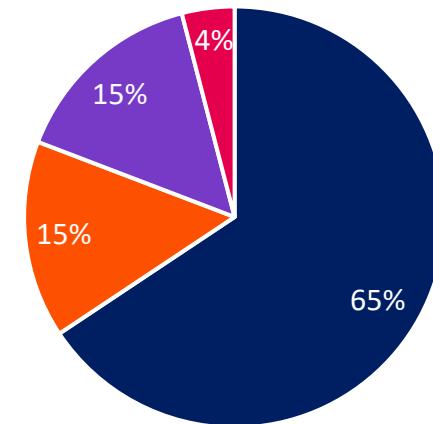
## Food and Beverage Services

*Are all of your food and beverage services currently open with operating hours comparable to 2019 (inclusive of room service)?*



■ Yes ■ No

*Do you plan to expand [or reopen] your food and beverage services in the next 18 months?*



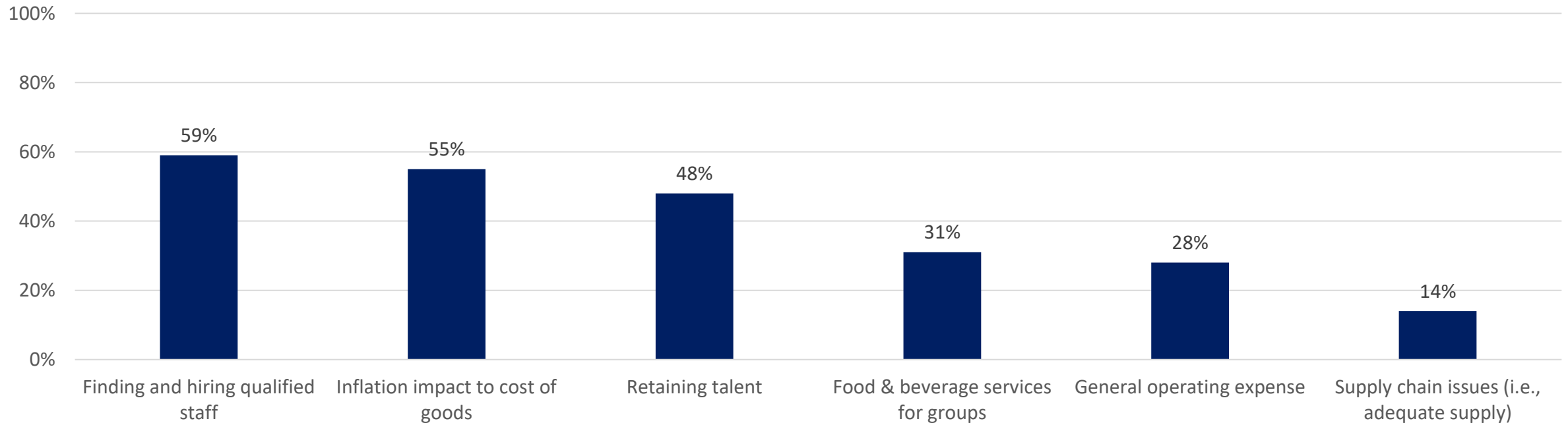
■ Yes [all will be open in the next 18 months]  
■ We plan to open some in the next 18 months  
■ No, no changes in the next 18 months  
■ Not sure



Hoteliere see finding and hiring qualified staff as the biggest concern for their busiest properties over the next 18 months, followed by retaining talent and increased costs.

## Challenges

*What do you see as your busiest incentive properties biggest cost [operational] concerns in the next 18 months? Check all that apply.*



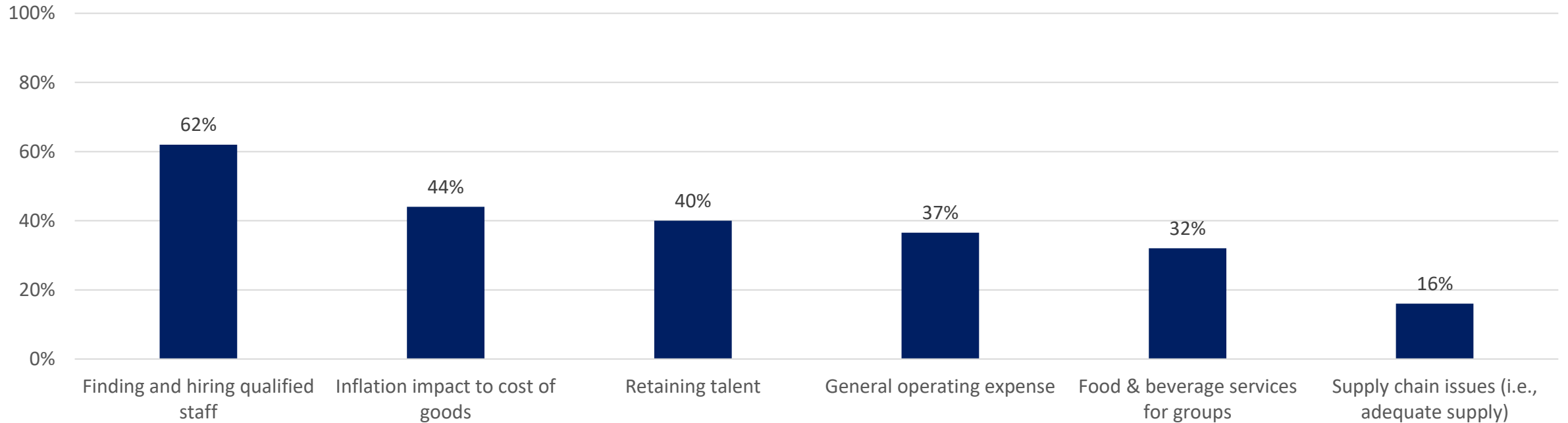
\* Low sample size



Similarly, Hoteliers see finding and hiring qualified staff as the biggest cost concern across ALL their property over the next 18 months, followed by inflation and retaining talent.

## Challenges

*What do you see as your property's biggest cost (operational) concerns in the next 18 months? Check all that apply.*

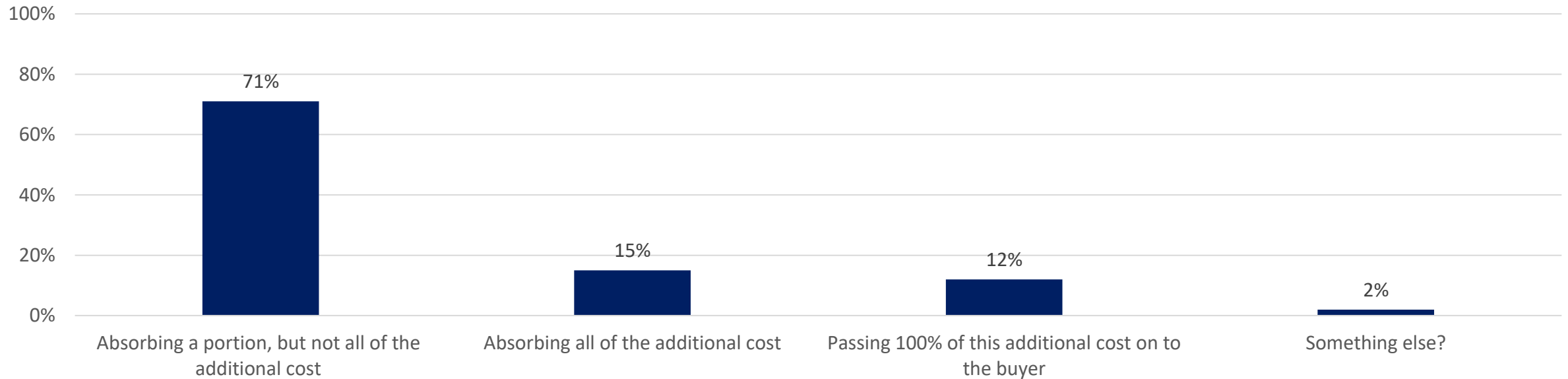




▶ 7 in 10 Hoteliers are absorbing a portion but not all the additional inflationary cost

## Combating Inflation

*What are you doing to combat inflationary cost increases? Select one*

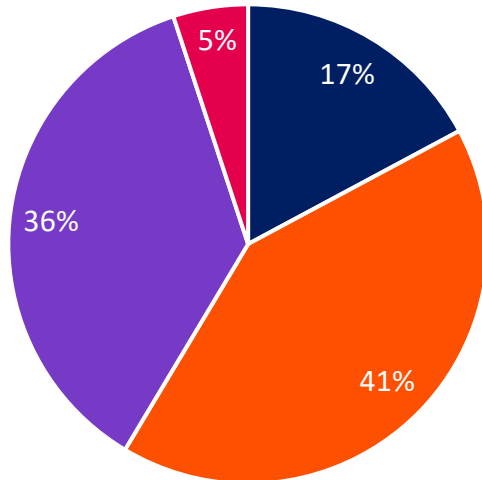




▶ Less than 1 in 5 Hoteliers say they have more staff now than they did in 2019, with a further 2 in 5 saying they have the same number. Around two-thirds say, “staffing has been challenging but we have managed to maintain desired levels.”

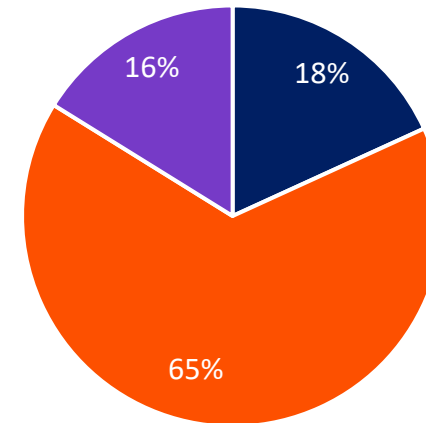
## Staffing

*How does your current staffing compare to 2019 levels?*



- We have more staff now than 2019
- We have the same number of staff now compared to 2019
- We are working to staff up to 2019 levels
- We are not planning to staff up 2019 levels in the foreseeable future

*Which of the following options best describes your recent experience managing staffing levels?*



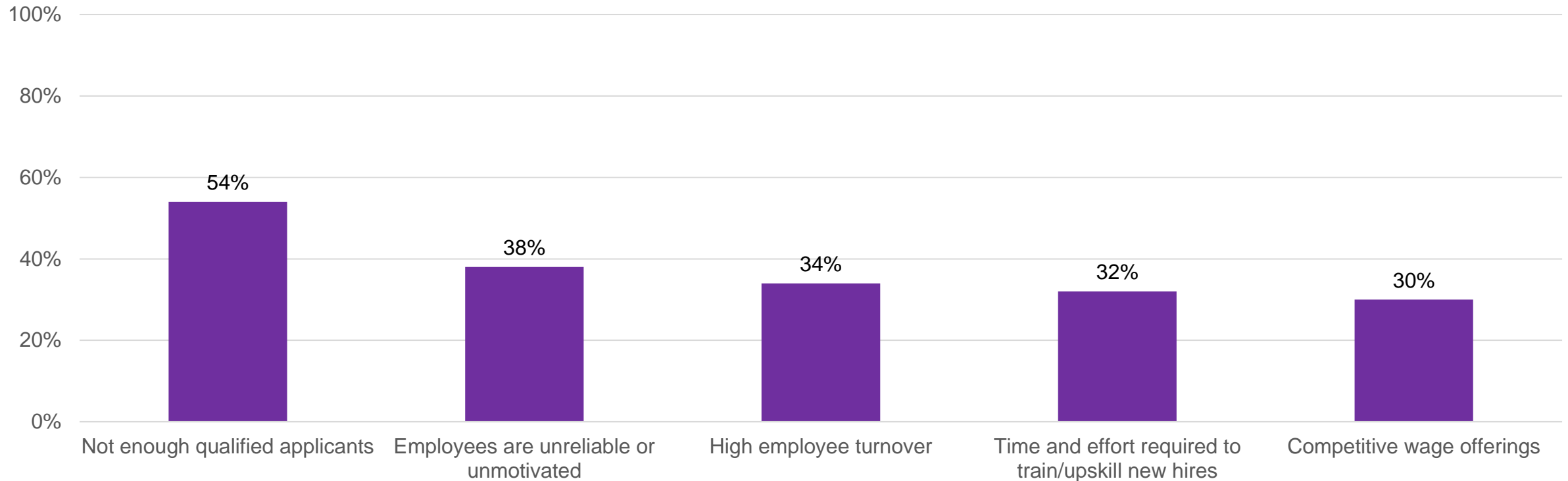
- We have been easily able to maintain desired staffing levels
- It's been challenging but we have managed to maintain desired staffing levels
- We have not been able to maintain desired staffing levels



- ▶ Hoteliers are facing a number of challenges when it comes to staffing, including a low number of qualified candidates, high employee turnover and unreliable or unmotivated employees.

## Challenges in Staffing

*Are you encountering any specific challenges or obstacles in managing your staffing levels?*

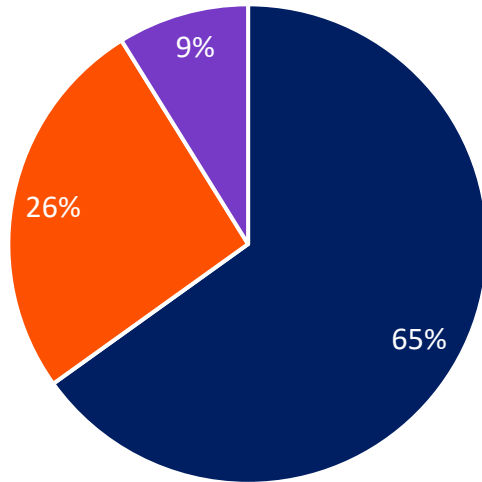




Nearly 2 in 3 Hoteliers say that they have excellent relationships with their partners and that they are trusted parties who engage respectfully. The majority say they have excellent or very good experiences of providing group incentive travel programs over the past 6 months.

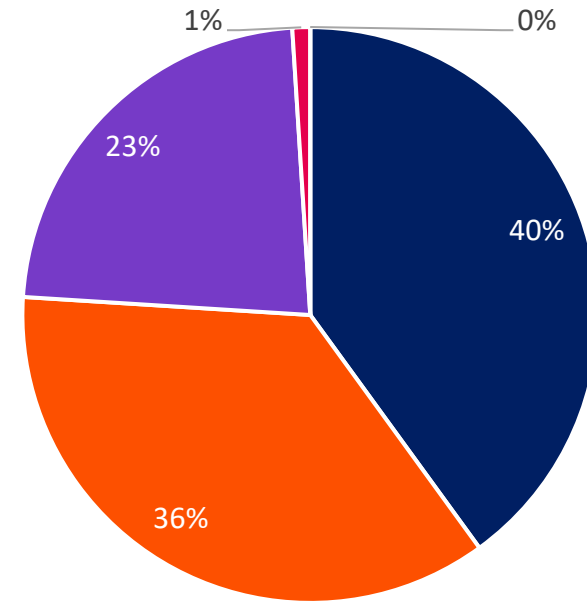
## Partnerships with Incentive Planners

Please select the option below that best describes the level of partnership your property or portfolio/chain generally has with incentive planners.



- Excellent – trusted parties engaging respectfully
- Fair – usually positive but occasional challenging dynamics
- Needs improvement – challenging to collaborate for a good outcome

Generally speaking, how would you rate the experience you have been able to provide group incentive travel programs over the past 6 months?



- Excellent
- Very good
- Good
- Fair
- Poor





## ▶ Operational Costs in Incentive Travel

*How are you balancing the challenges of providing 2019-level amenities and service levels for incentive travel planners with the increased operational costs for your property or portfolio*

Key message:

- *Evaluate pricing to accommodate client needs whilst also minimising spend*
- *Prioritise spend on the most important amenities to the customer*
- *Maximise resources to reduce waste and get the most out of spend*

We have not cut any amenities or service levels but have seen price increases across the board that are being passed down.

Adjusting pricing, being creative and using task force and outside labor suppliers

We are looking for creative ways to manage costs. Room rates are higher than 2019 so that assist with this process.

Strengthen the quality of work to ensure stability and operation

Optimize resource utilization, avoid waste, such as saving energy, reducing water consumption, minimizing waste, etc. This can not only reduce costs, but also improve environmental image.

We have raised the prices on all menus(banquets, ird and restaurants). Increased the resort fee. We are closely watching labour costs especially overtime.

Resort is trying to add more value with its complimentary services and amenities (i.e. complimentary tennis/pickle ball, culinary tastings and demonstrations, complimentary fitness classes and guided hikes.

Evaluate existing operating costs and look for cost savings. This can include reducing unnecessary expenditures, such as reducing energy costs, optimizing operational processes, saving labor costs, etc.



## ► Approach to Incentive Business

*What do you think incentive planners should know about your approach to incentive business moving into the next 18 months?*

Key message:

- *Dedicated customer service is necessary to ensure a personalised and positive experience*
- *Communication is key for ensuring a positive experience*
- *Need to understand current industry trends*

100% commitment to service and provide an exceptional service from all departments and touch points.

we are working to continue to increase staffing levels to assure the best service and product for the groups.

It is necessary to understand the trends and forecasts of the tourism industry in the next 18 months in order to develop corresponding incentive plans.

We are committed to providing exceptional customer service, and our dedicated team will be available 24/7 to support incentive planners throughout the planning and execution process.

In the coming months, we plan to enhance our technology infrastructure to streamline the planning and execution process for incentive programs, providing greater efficiency and convenience for planners.

Our proactive approach involves collaborating with incentive planners to co-create tailored experiences that meet their specific goals and objectives.

It is necessary to understand the trends and forecasts of the tourism industry in the next 18 months in order to develop corresponding incentive plans.

We need to understand potential customers and markets in different destinations to develop attractive incentive plans.



## ► Improvements in Incentive Travel

*What would you like to see improved as it relates to incentive travel?*

Key message:

- *Move towards more sustainable/ Eco-friendly travel and activities*
- *Improve customer service to assist customers with their queries, help with redeeming rewards and other needs*
- *Use better rewards to drive use of incentive travel services*

Greater transparency in pricing and cost breakdowns to ensure clarity for incentive planners.

A better understanding of the incentive qualification period to find ways to upsell (ex. quarterly contests - exceed your goals by X%, you get to stay in a villa instead of a suite, etc.)

Offer personalized programs according to the season

More unique personal touches. Bonus extras available, room gifts, special memories of the trip

Date flexibility, keeping F&B functions on property, consider unique domestic destinations.

Ensure sustainability and positive impact by choosing environmentally friendly modes of transport, supporting local communities and culture, and reducing environmental impact.

More Attractive Rewards - Rewards should be more attractive to motivate travelers to use the travel company's services more. For example, offer more free flights, accommodation, meals or travel activities, etc.

Sustainability: Sustainability is becoming an increasingly important factor for incentive travel. Incentive planners should prioritize environmentally responsible practices and initiatives, such as eco-friendly transportation, accommodations, and activities.



Tourism Board/  
Convention/Visitors Bureau

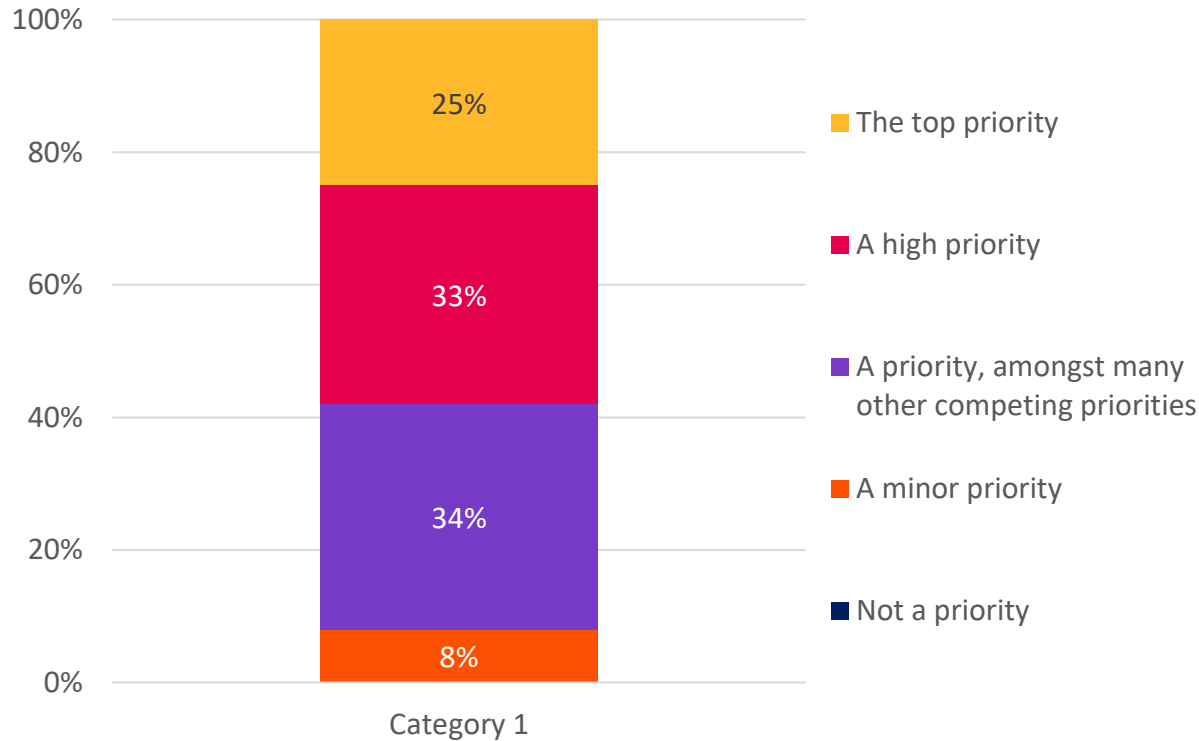
---



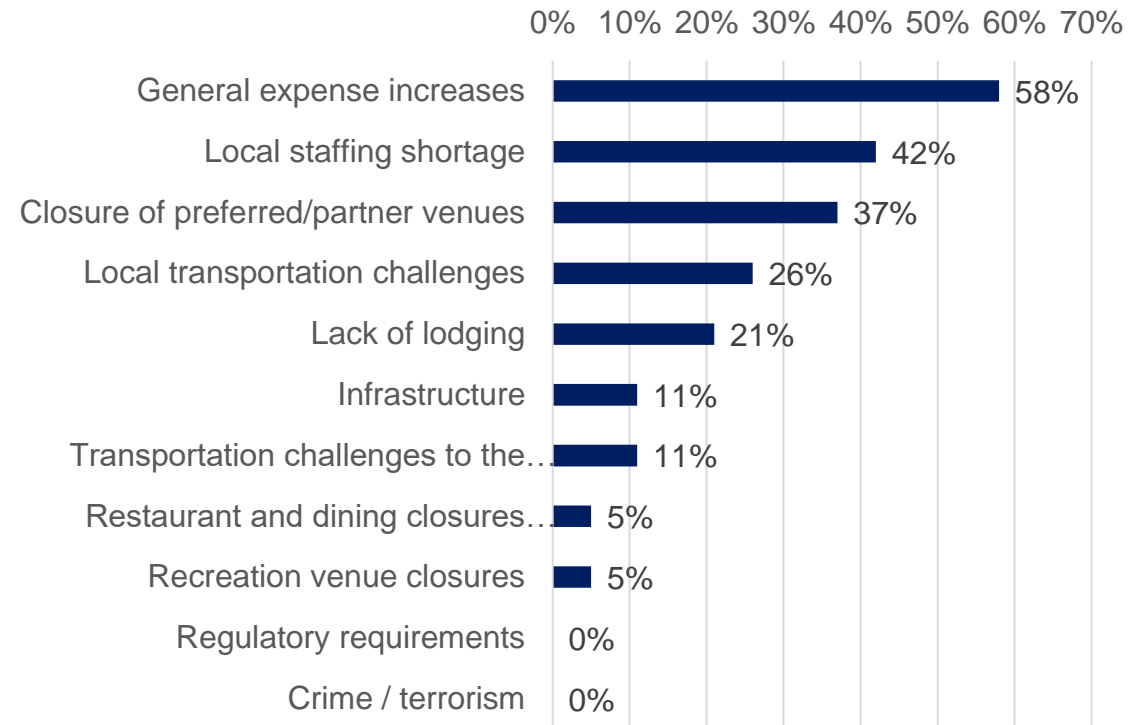
Tourism Boards/Visitors Bureaus are juggling many challenges with most considering incentive travel a high priority. General expense increases, staffing shortages and closure of preferred/partner venues also key challenges

# Incentive Travel

What priority is group incentive travel for your business in the next 18 months?



Please rank your biggest challenges your organization currently faces as it relates to incentive travel with 1 being your biggest challenge. (% Rank #1 or #2)



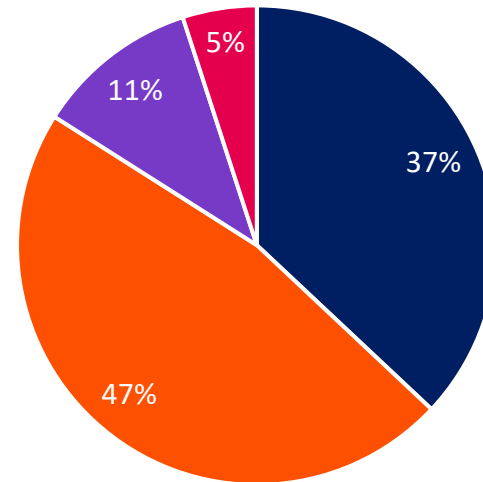
\* Low sample size



- ▶ Tourism Boards/Visitors Bureaus say that group incentive travel is very important to drive a positive economic outcome for the destination.

## Group Incentive Travel

*How important is group incentive travel to driving a positive economic outcome for your destination?*



**84%**

Score 7+/10 for importance

■ 9-10 ■ 7-8 ■ 5-6 ■ 3-4 ■ 1-2

\* Low sample size



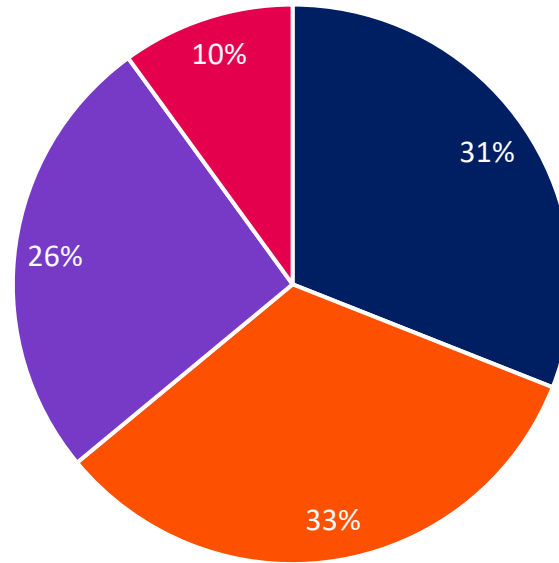
▶ Tourism board response time is fairly quick with most responding to RFPs in a few days or less. 1 in 10 take more than 2 weeks to respond.

## RFP Response Time

*What is the average number of business days from the time you receive an RFP for a group incentive travel program to submitting a full proposal, with rates, dates, and space?*

**64%**

Respond within a few days



**Mean 18 days**

■ A day or two   ■ A few days   ■ A week to two weeks   ■ More than two weeks

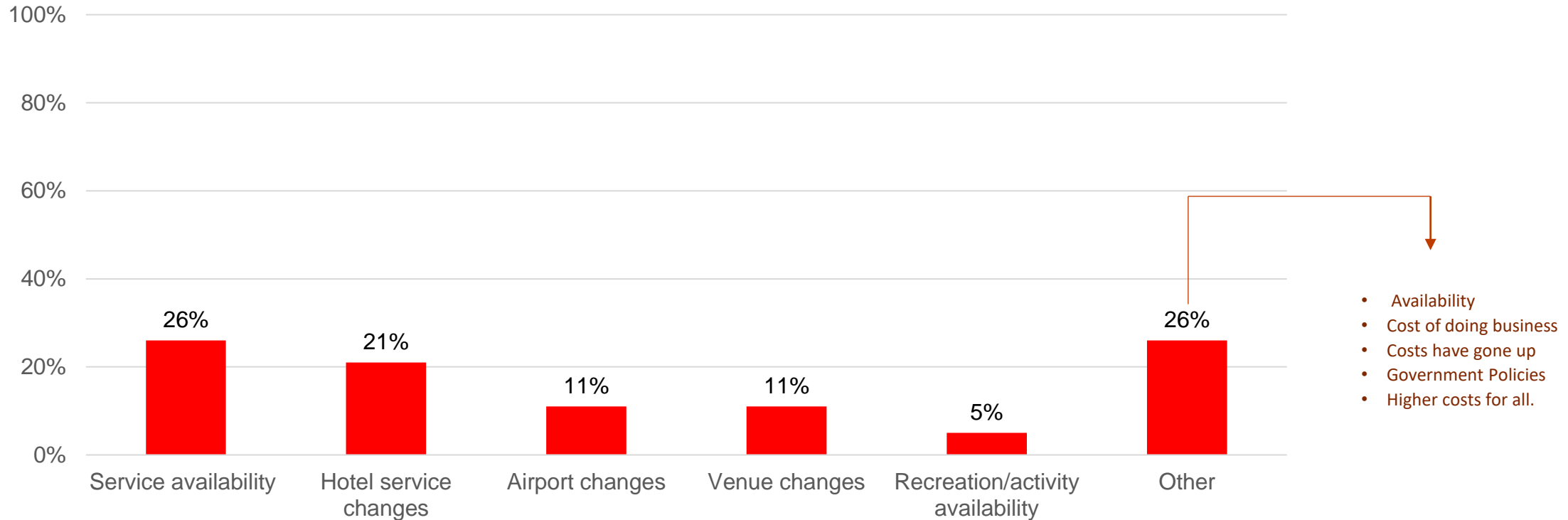
\* Low sample size



Service availability and hotel service changes are the biggest challenges that event organisers anticipate in the next 18 months, though “Other” factors also score highly.

## Challenges

*What are the biggest challenges that event organizers need to anticipate in the next 18 months?*



\* Low sample size

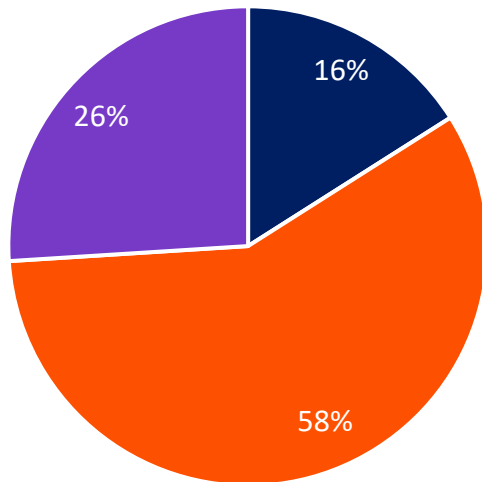




6 in 10 Tourism Boards and Convention Centres have the same number of staff as they did in 2019, though the majority say that it has been challenging to maintain staffing levels.

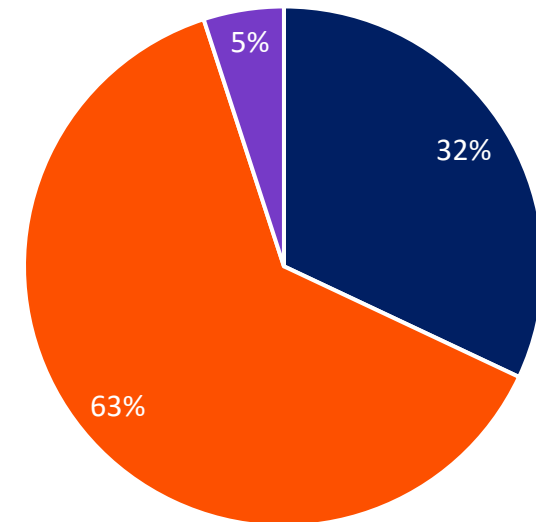
## Staffing

*How does your current staffing compare to 2019 levels?*



- We have more staff now than 2019
- We have the same number of staff now compared to 2019
- We are working to staff up to 2019 levels
- We are not planning to staff up 2019 levels in the foreseeable future

*Which of the following options best describes your recent experience managing staffing levels?*



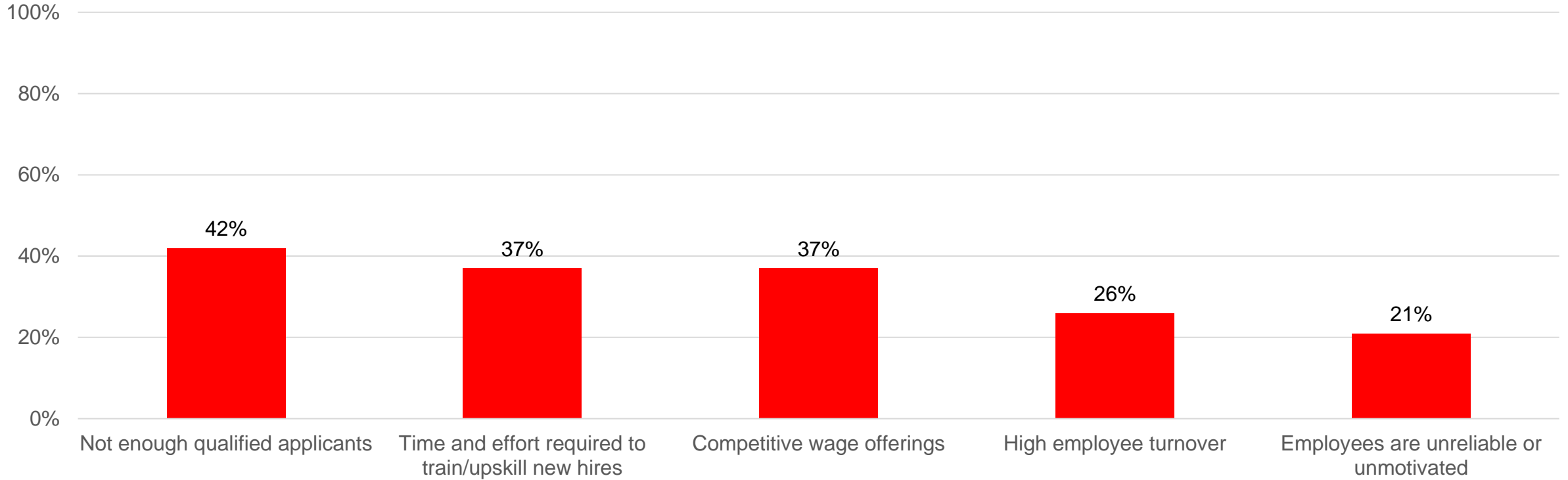
- We have been easily able to maintain desired staffing levels
- It's been challenging but we have managed to maintain desired staffing levels
- We have not been able to maintain desired staffing levels

\* Low sample size



▶ Lack of qualified applicants, the time and effort needed to train new hires and competitive wages are the main challenges when managing staffing levels. High employee turnover is also a problem.

*Are you encountering any specific challenges or obstacles in managing your staffing levels?*



\* Low sample size



## Destination Management Companies

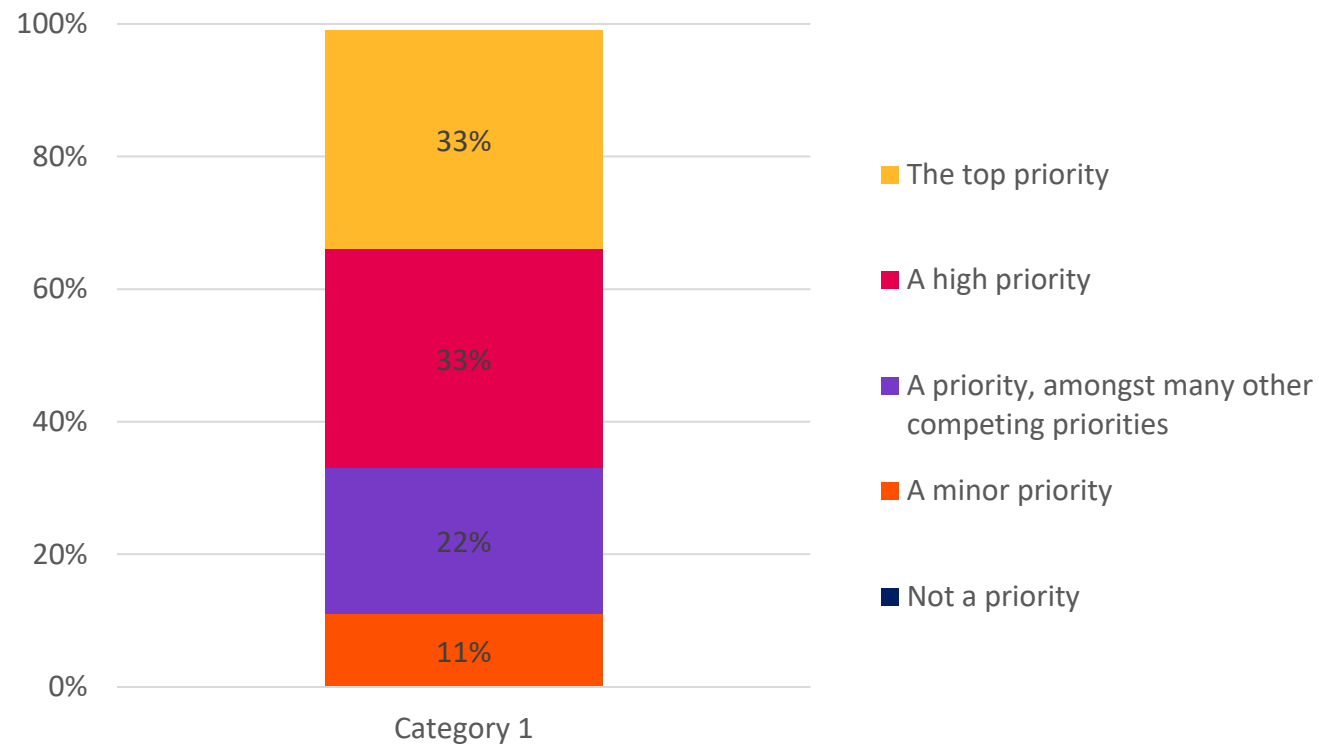
---



▶ Incentive travel is a priority for DMCs, with about one in three saying it's their top priority

## Incentive Travel

*What priority is group incentive travel for your business in the next 18 months?*

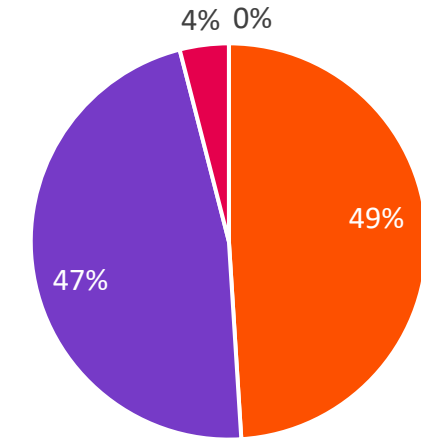




▶ There is competition in local areas for DMCs, with all having other DMCs in the local area. 2 in 3 are independent, and the majority have annual revenues under \$5m.

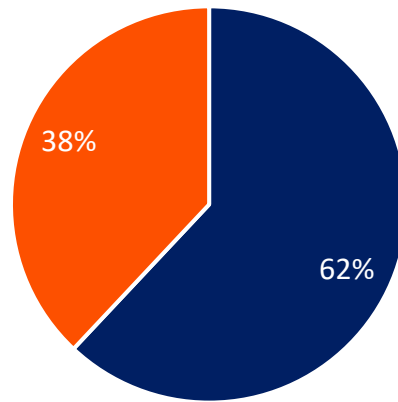
## DMCs Profile

Besides your organization, how many other destination management companies service or operate in your immediate area?



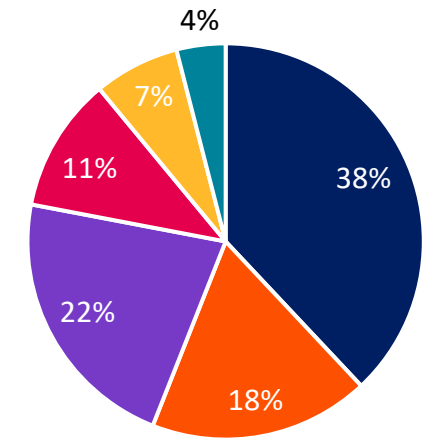
- None, we are it
- 1-3 others
- 4-12 others
- More than 12 others in our location

Are you an independent or part of a larger DMC network?



- Independent
- Network

What is your annual revenue?



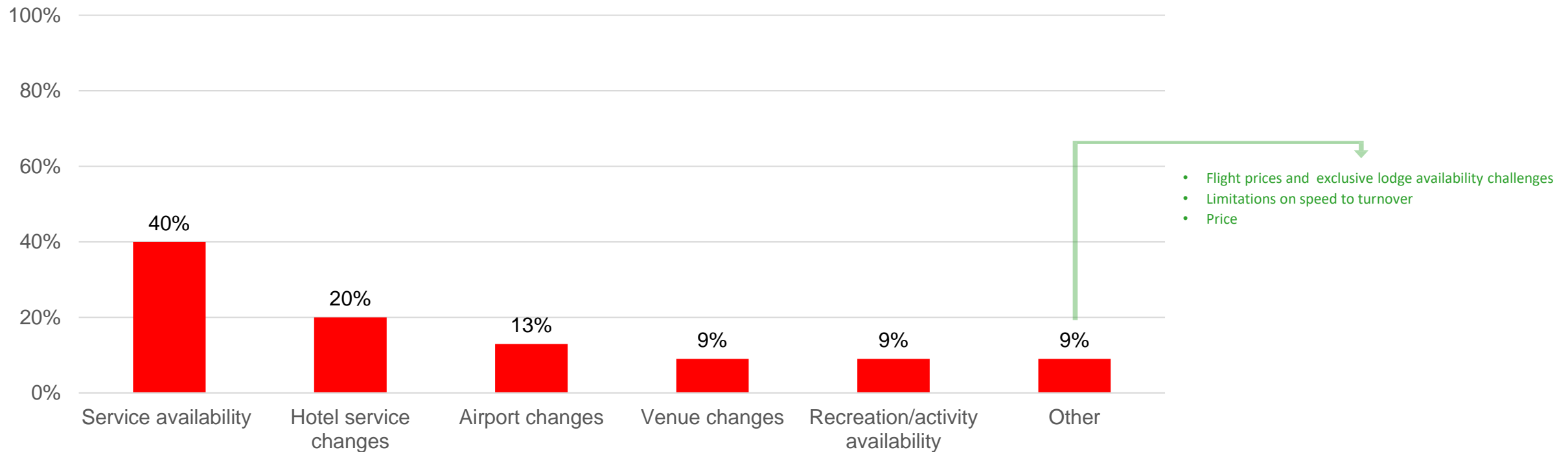
- Less than \$5 million
- \$5 million to \$24.9 million
- \$25 million to \$49.9 million
- \$50 million to \$74.9 million
- \$75 million to \$99.9 million
- \$100 million or more



- ▶ Service availability (or lack of) is something DMCs see as the biggest challenge that event organisers need to anticipate in the next 18 months.

## Challenges

*What are the biggest challenges that event organizers need to anticipate in the next 18 months?*

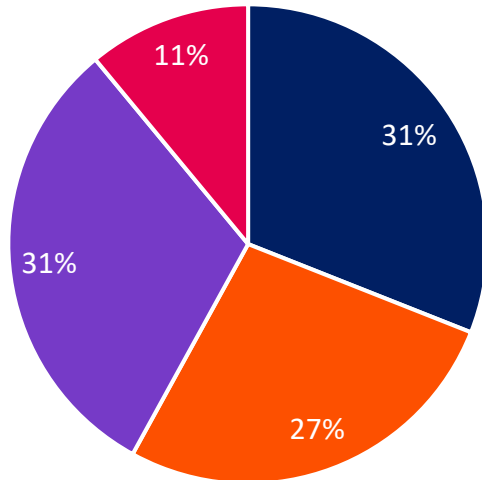




- ▶ The majority of DMCs have the same or more staff than they did in 2019 although it has been challenging to maintain the desired staffing levels for the majority.

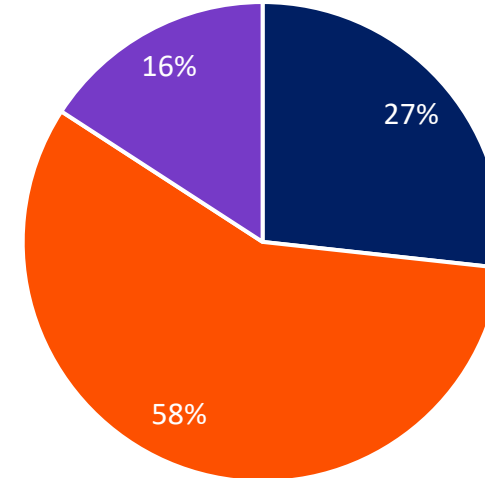
## Staffing

*How does your current staffing compare to 2019 levels?*



- We have more staff now than 2019
- We have the same number of staff now compared to 2019
- We are working to staff up to 2019 levels
- We are not planning to staff up 2019 levels in the foreseeable future

*Which of the following options best describes your recent experience managing staffing levels?*



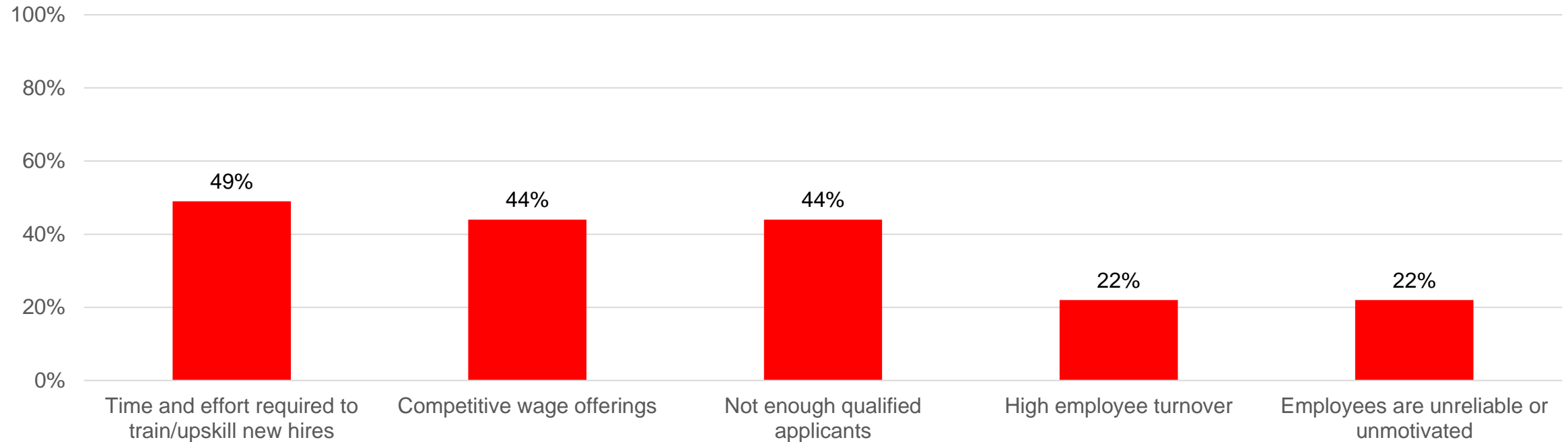
- We have been easily able to maintain desired staffing levels
- It's been challenging but we have managed to maintain desired staffing levels
- We have not been able to maintain desired staffing levels



- ▶ Time and effort to train new hires is the main challenge when managing staffing levels. Competitive wages and lack of qualified applicants are also big problems.

## Staffing

*Are you encountering any specific challenges or obstacles in managing your staffing levels?*



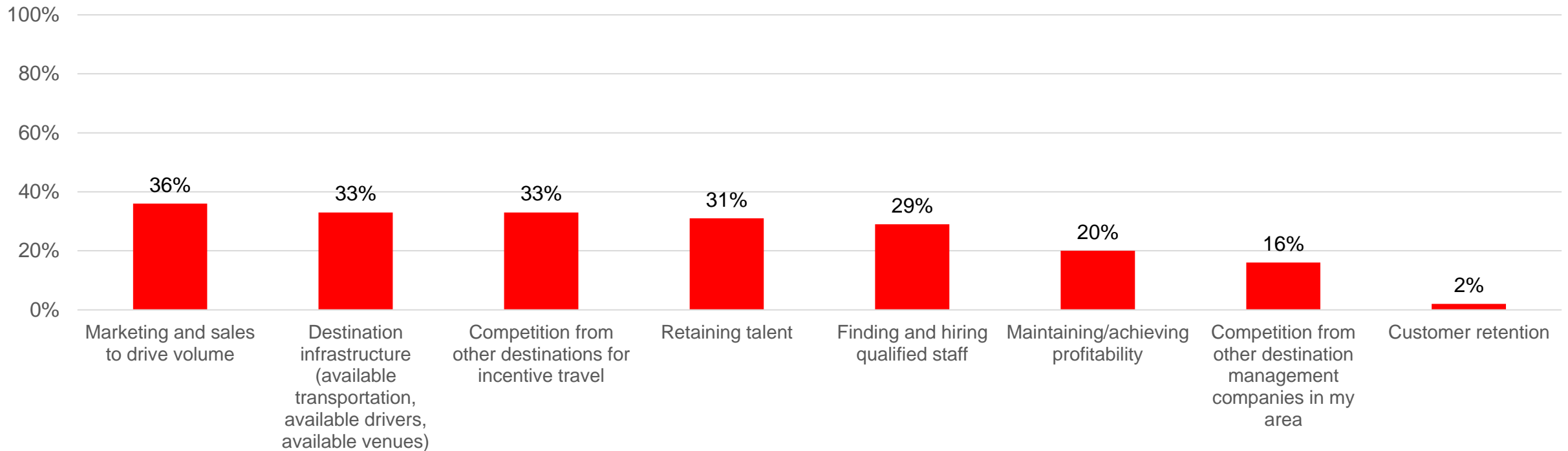




- ▶ Challenges facing DMCs include: driving volume; competition from other destinations and finding & retaining talent. Challenges more outside of DMCs' control include: destination infrastructure

## Staffing

*Please rank your biggest challenges in incentive travel in the next 18 months with 1 being the most challenging and 3 being the least challenging (Rank #1 and Rank #2)*

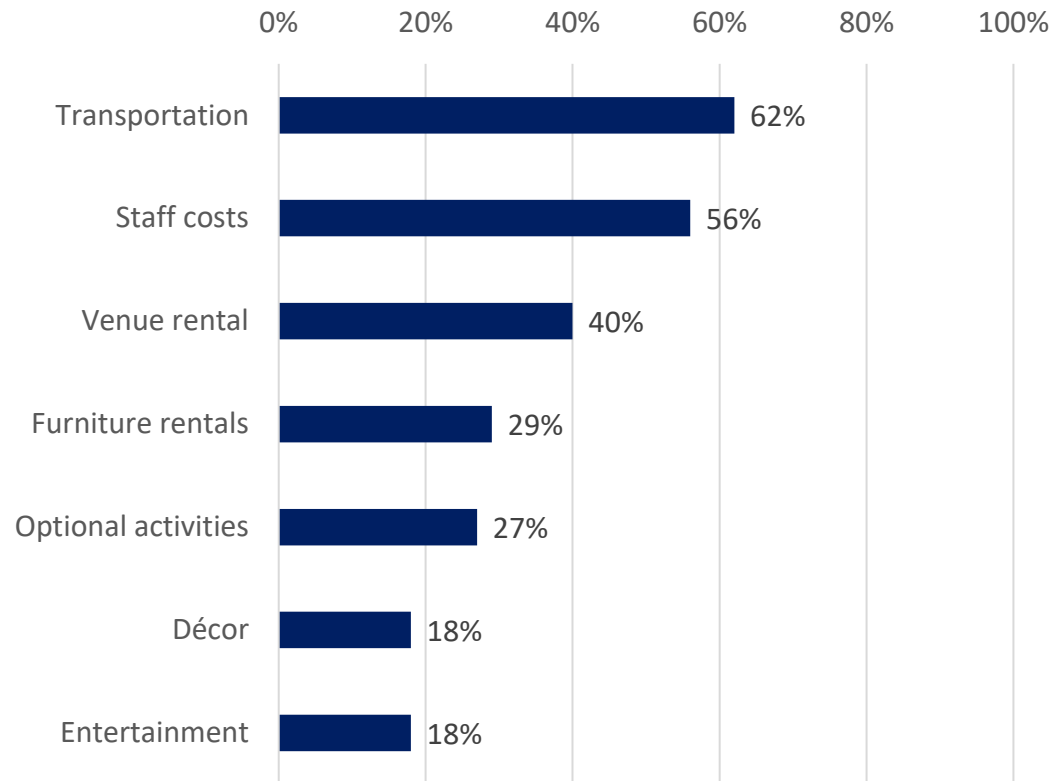




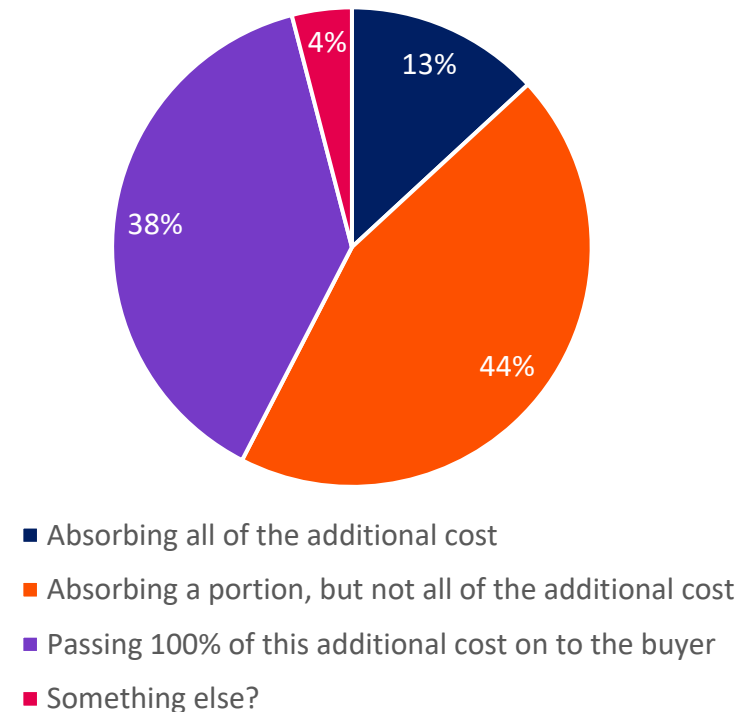
Over half of DMCs are reporting both transportation and staff costs are increasing. 1 in 4 are absorbing a portion of these costs whilst a similar proportion are passing these cost increases on.

## Staffing

Where are you seeing the biggest increases in your cost of delivering services?



What are you doing to combat inflationary cost increases?

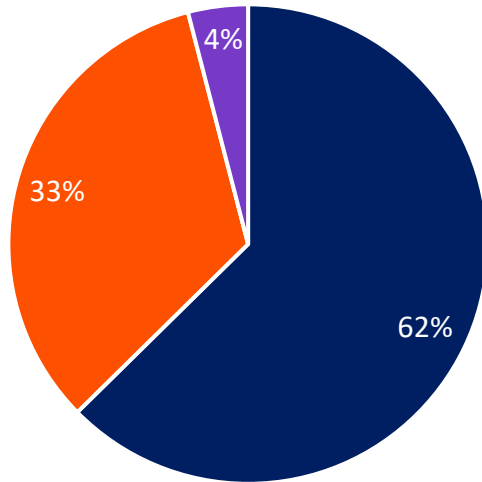




▶ Over 6 in 10 DMCs say that they have excellent relationships with their partners and that they are trusted parties who engage respectfully. The vast majority say they have excellent or very good experiences of providing group incentive travel programs over the past 6 months.

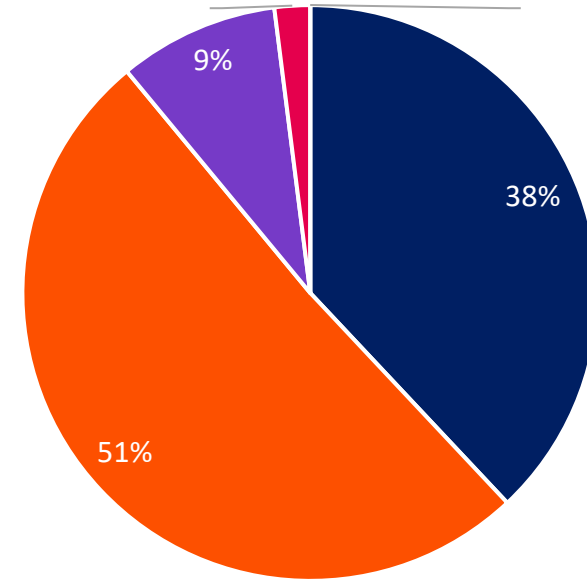
## Partnerships with Incentive Planners

*Please select the option below that best describes the general level of partnership you have with incentive planners*



- Excellent – trusted parties engaging respectfully
- Fair– usually positive but occasional challenging dynamics
- Needs improvement – challenging to collaborate for a good outcome

*Generally speaking, how would you rate the experience you have been able to provide group incentive travel programs over the past 6 months?*



- Excellent
- Very good
- Good
- Fair
- Poor

# ► What Planners Need to Know

## DMCs' perspective

The key message from DMCs is that they are slammed:

- Staffing is in short supply
- Response times will increase
- Surcharges for fuel
- Transportation and driver shortages
- Book early
- Stick with the tried and trusted for now

*What do you feel would be important for planners to know about your destination?  
(Select Comments)*

"We are ready to welcome your incentive event as a safe destination with all the familiar services you find back home, but with an international feel"

The experiences, the culture, the amazing food.

While there is more air lift than ever and new hotels opening, demand is high so inventory can be low not due to availability.

"Climate and weather patterns: this information can help planners determine the best time of year to visit and what types of clothing and gear travellers may need."

"Location and geography: this includes the country, city, region, and any unique geographical features that make the destination stand out."

"While availability may be a challenge...there are still short-term opportunities."

"Lots of new luxury properties opening in the next 24 months Michelin star rated restaurants added in last 24 months. unique csr opportunities"

"Business growth is more important."

# ▶ What Planners Need to Know

## DMCs' perspective

The key message from DMCs is they are balancing:

- Product quality and cost-saving measures
- The demand for services with a decreased number of service providers/staff members
- Client communication

*How are you balancing the challenges of providing 2019-level amenities and service levels for incentive travel planners with the increased operational costs for your property or portfolio  
(Select comments)*

"Implementing cost-saving measures without compromising on quality."

"Negotiating service level agreements to set best possible conditions and benefits upfront."

"We have cut operational costs by going digital on all services we offer and increasing morale in working space"

Being transparent with clients and advising that challenges are here, costs are increasing

"Adding staff is our largest expense to combat pricing issues"

Adjust your budget and allow more time to rethink your itinerary

"“Being transparent and offer a real value of the services and products. We always deliver what we offer, and the client is aware of all the costs involved and the justified reasons for this.”"

We are trying hard to reduce the operating costs and ensuring their id reduced staff turnover.

# ► What Planners Need to Know

## DMCs' perspective

The key messages from DMCs :

- Personalisation towards travellers is key to creating a good experience
- Client communication is important for meeting their needs

*What do you think incentive planners should know about your approach to incentive business moving into the next 18 months?  
(Select comments)*

"Develop close relationships with travel agents, incentive travel planning companies and corporate partners. This can expand the market channel and attract more incentive tourism business."

"We provide the best value for money and excellent service."

"Managing incentive programs is a team effort and planners need to be as transparent as possible."

"The more information we have about the group and their goals, the better we can tailor a program to meet their needs."

"Focusing on open communication to provide experiences that match expectations."

"We are investing more in the success of programs while also paying close attention to the needs of our teams so that we maintain the best people. We are incentivizing clients who are contracting earlier."

Develop close relationships with travel agents, incentive travel planning companies and corporate partners. This can expand the market channel and attract more incentive tourism business.

"Safety is a top priority. The health and safety of travelers should be the top priority for incentive planners. It's important to stay up-to-date on the latest health and safety guidelines and protocols and to implement measures to ensure travelers' safety during their trip."



Incentive Planner/  
Third Party Incentive Agency

---

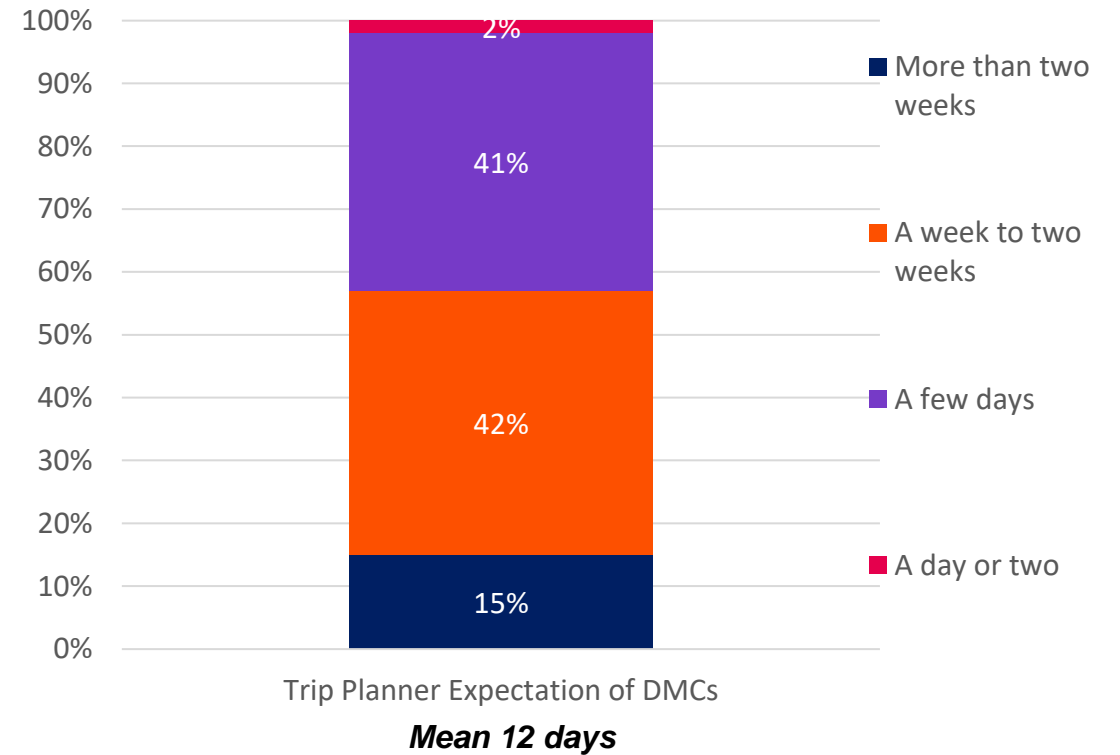
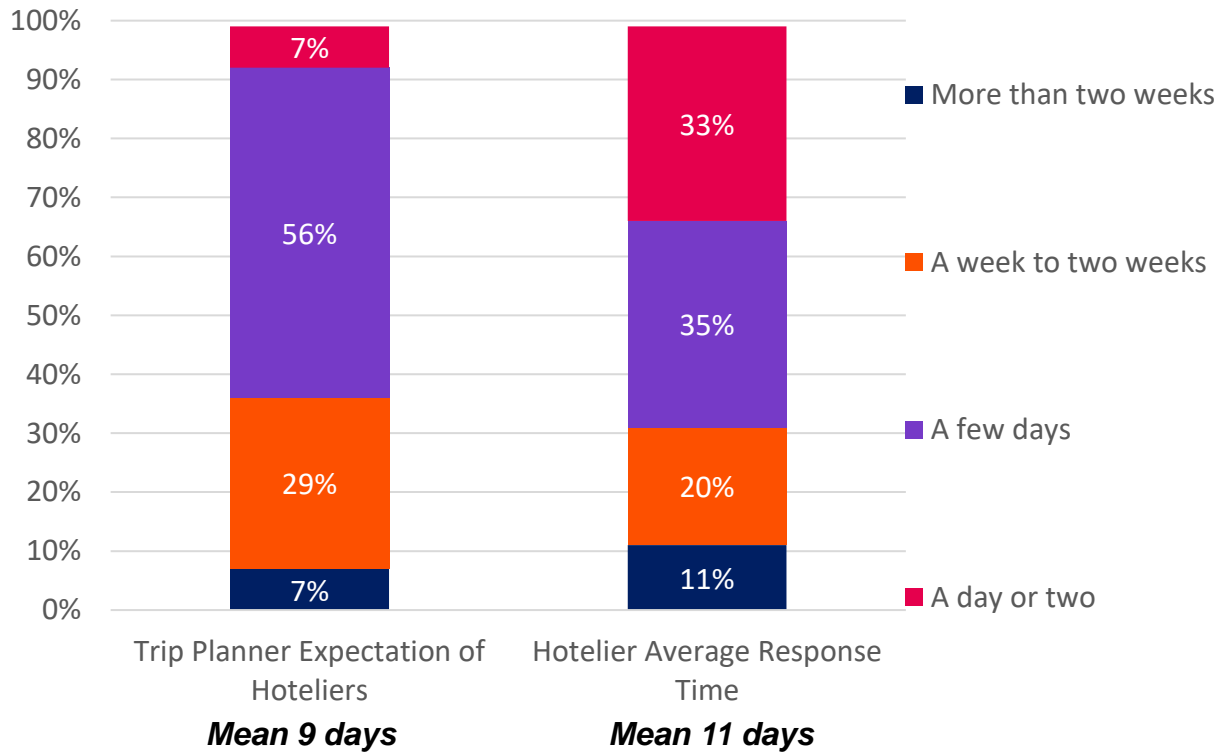


▶ Most Planners expect a response to an RFP within a few days from Hoteliers, whilst many tend to give DMCs longer to respond

## RFP Response Time

What is the acceptable number of business days for **hoteliers** to submit a full proposal to an RFP for a group incentive travel program, with rates, dates, and space

What is the acceptable number of business days for **DMCs** to submit a full proposal to an RFP for a group incentive travel program?



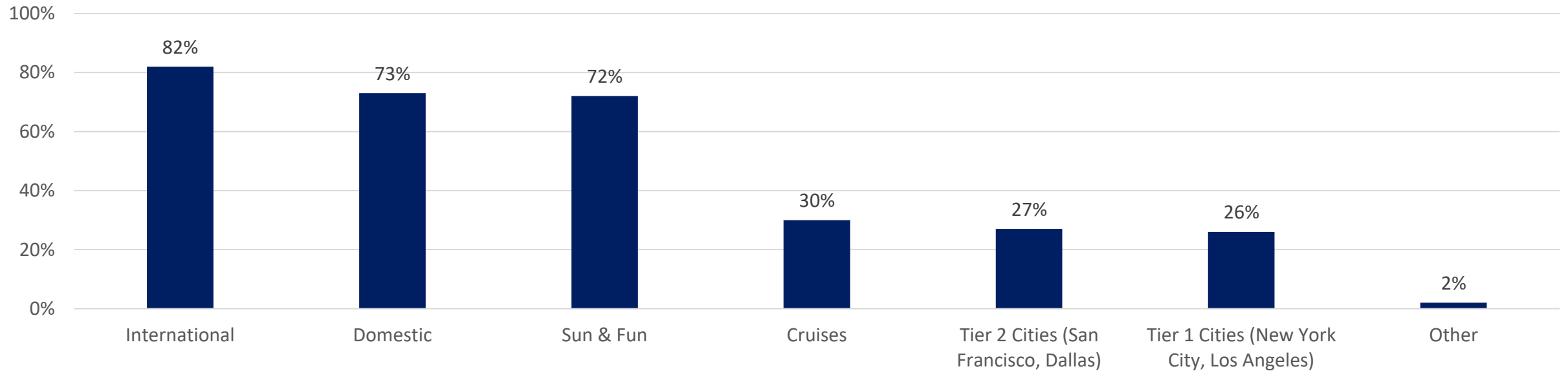




Planners are focused on both international and domestic incentive travel. Sun and Fun is also a point of focus.

## Planned Trips

*What types of incentive travel will you focus on in the next 18 months?*

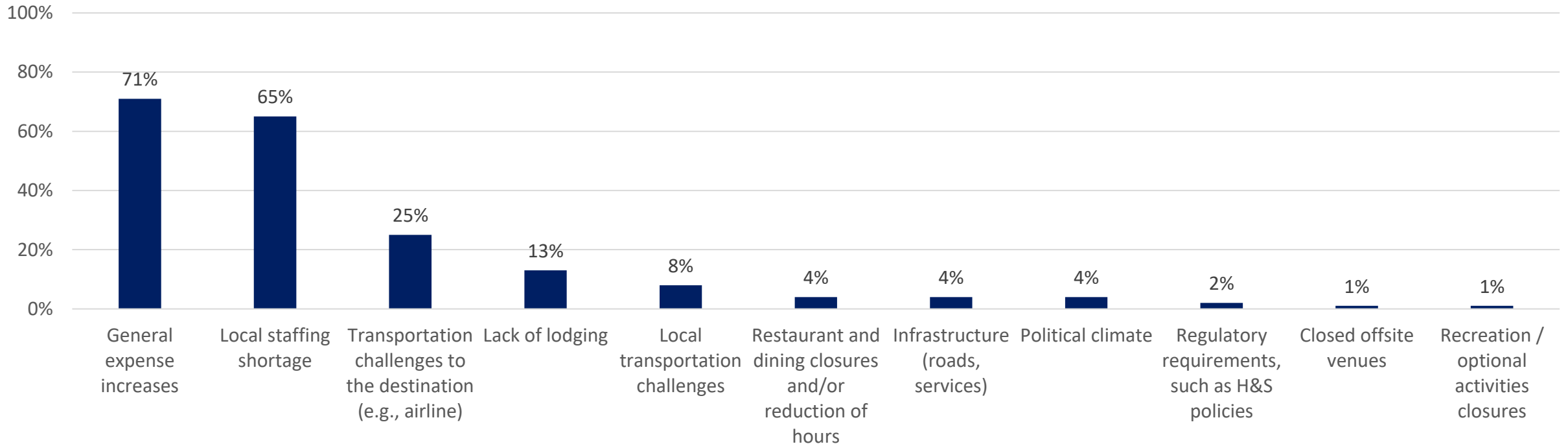




▶ Planners are principally concerned about rising expenses and local staffing shortages. Transportation challenges are also a concern.

## Travel Planner Concerns

*Please rank your biggest concern about incentive travel in the next 18 months as it relates to Tourism Board, CVBs, and DMCs with 1 being the highest concern 75% (% Rank 1 and 2)*

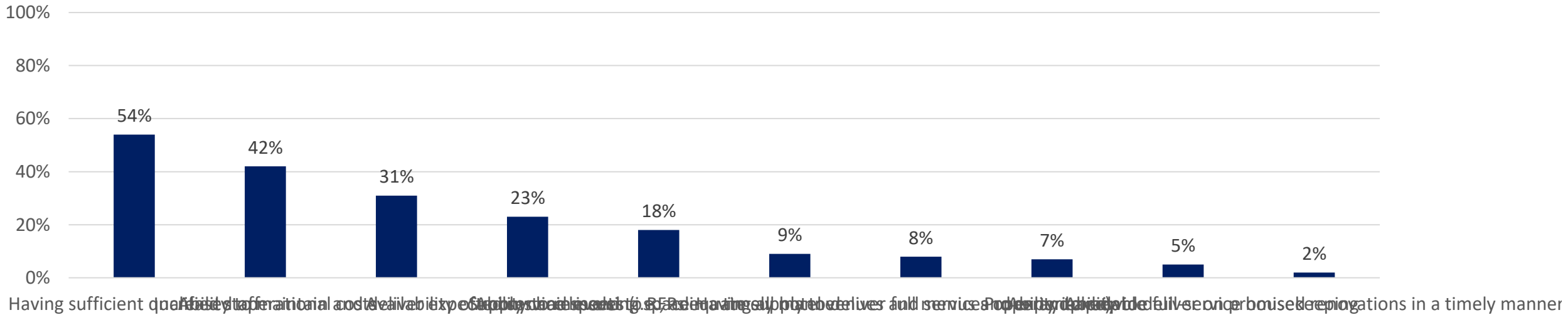




▶ Qualified staff are the greatest concern for planners, followed by operational cost increases and ability to maintain expected service levels.

## Travel Planner Concerns

*Please rank your biggest concern about incentive travel in the next 18 months as it relates to Tourism Board, CVBs, and DMCs with 1 being the highest concern 75% (% Rank 1 and 2)*

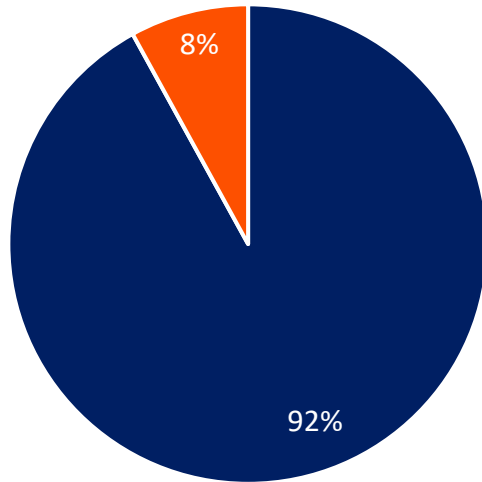




▶ Vast majority of planners conducted a program in the last 18 months. Rates, response time from Hoteliers and DMCs and Housekeeping were all evaluated much worse than 2019.

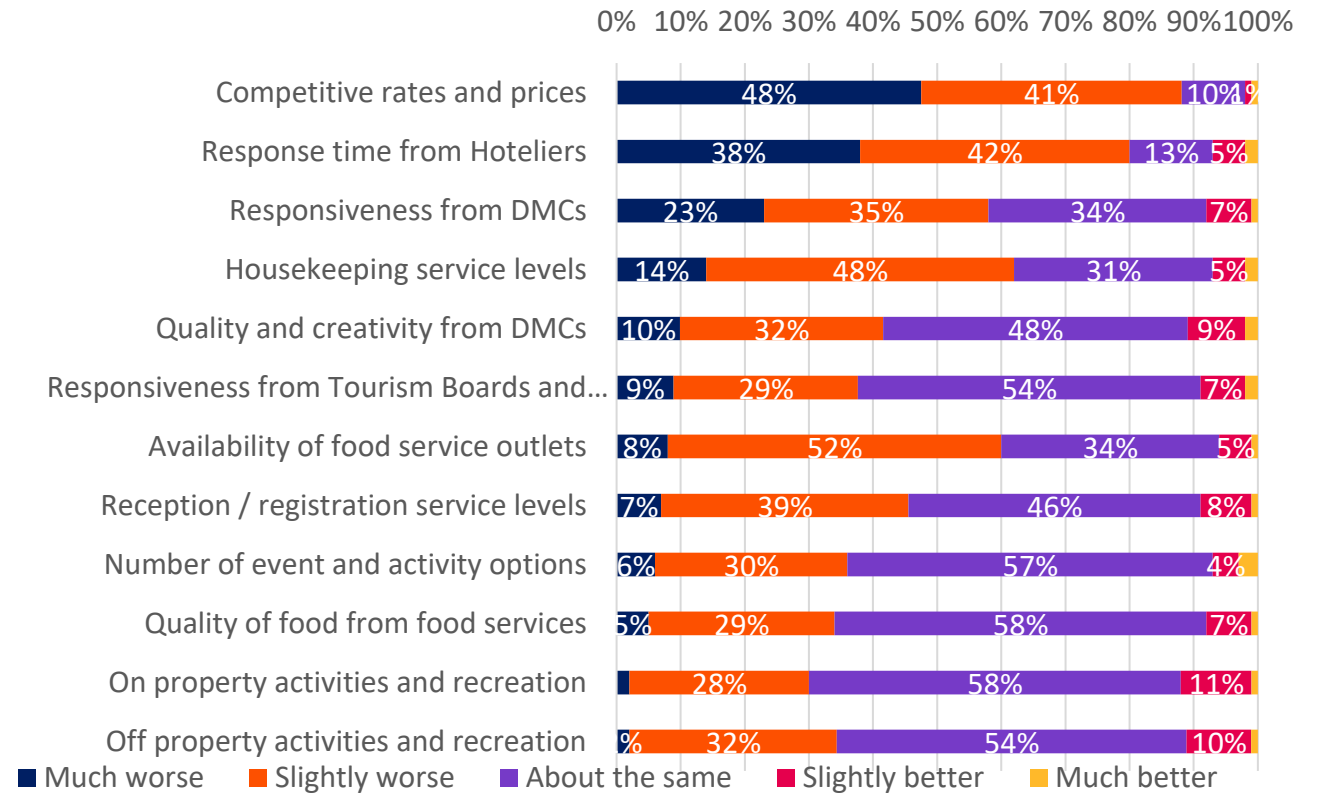
## Incentive Planner Experiences

Have you operated an incentive travel program in the last 18 months?



■ Yes ■ No

*For programs you've operated in the last 18 months, how have the following attributes compared to 2019 incentive programs*

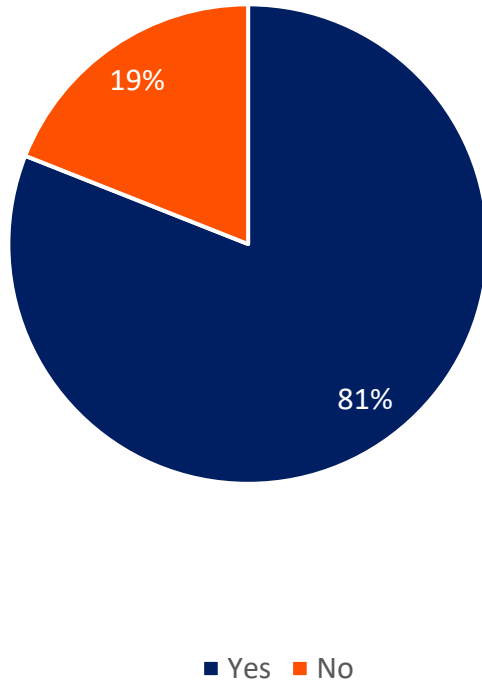




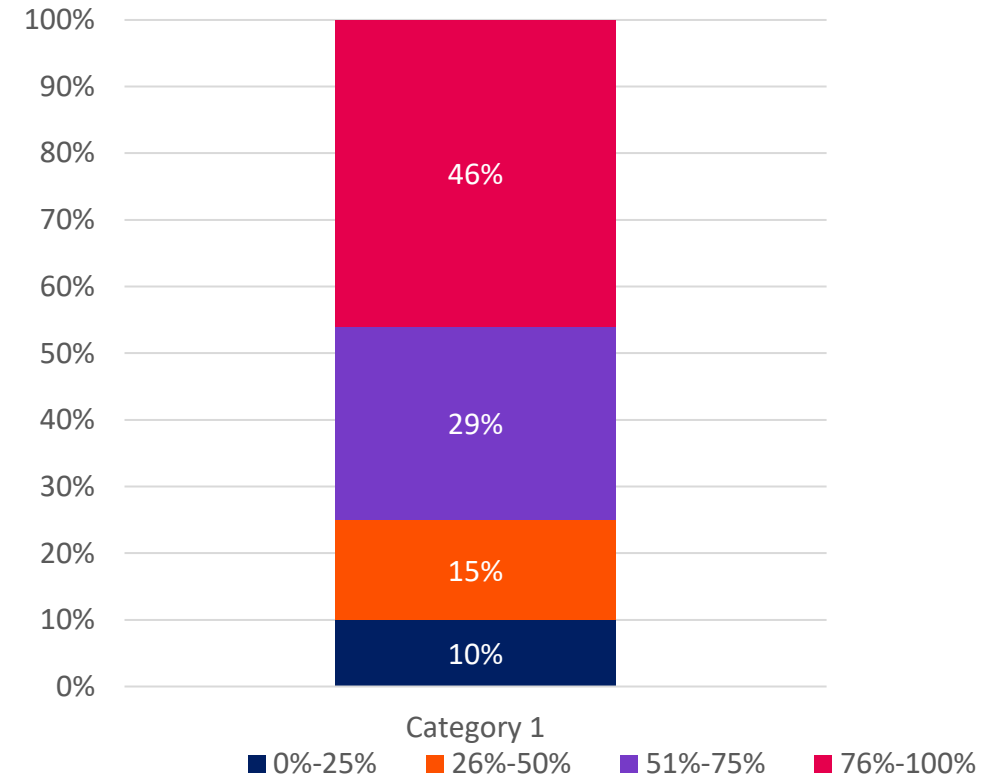
▶ 81% of Planners conducted a site inspection in the last year. About three-quarters reported the site inspections as being up to the organization's standards.

## Site Inspections

Have you conducted a site inspection in the last 12 months?



What percentage of those site inspections have been up to your organization standards

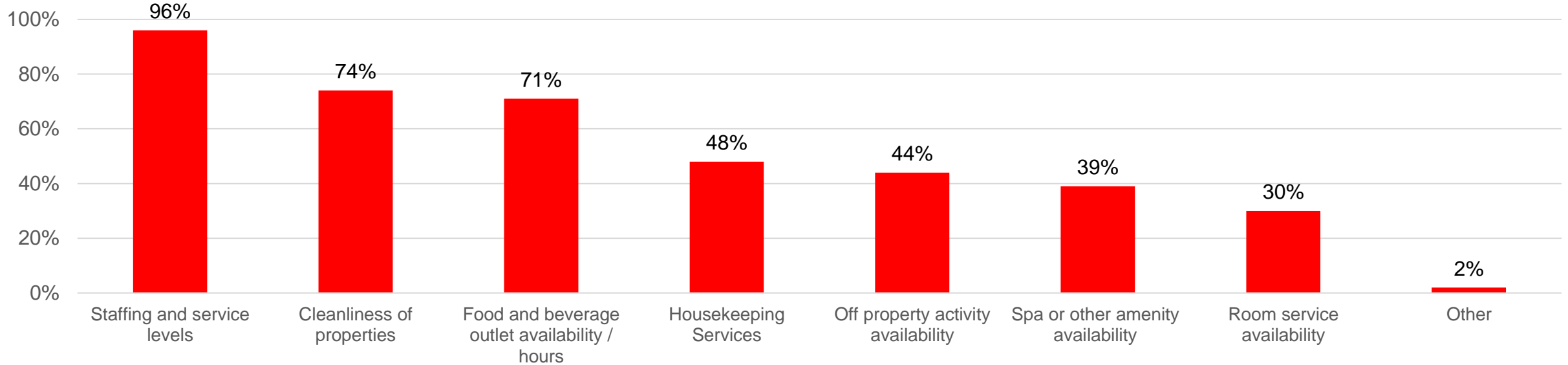




- ▶ Key concerns by planners centred mostly on staffing and service levels, followed by general cleanliness of the property and food and beverage availability.

## Hotel Infrastructure Concerns

*What elements of hotel infrastructure are you most concerned about when making decisions about where to place your program?*

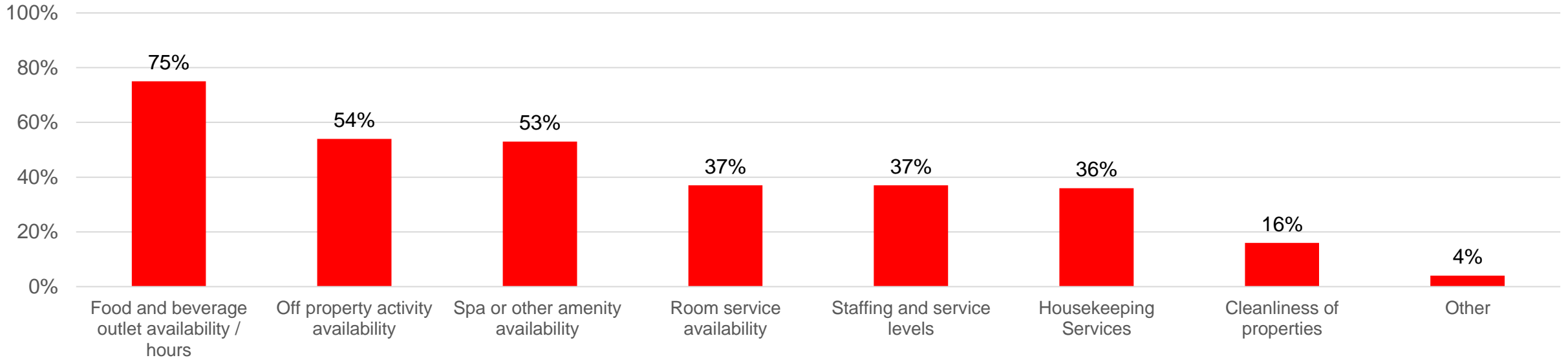




▶ Most of the communication to attendees were centred around availability of food & beverage, the availability of off-property activities and spa availability.

## Attendee Communication

*What aspects of the hotel experience are you currently communicating to your attendees ahead of the program*

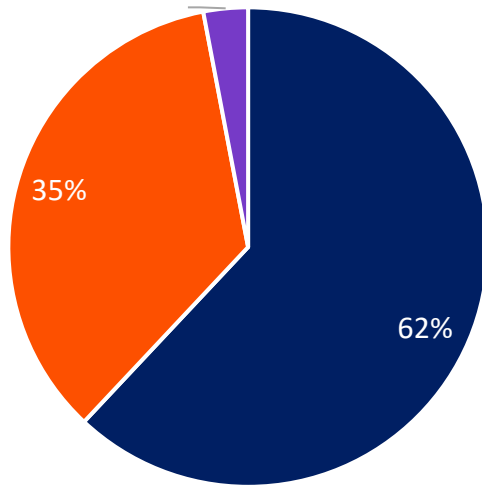




▶ 6 in 10 Planners say that they have excellent relationships with Hoteliers, and that they are trusted parties who engage respectfully. 8 in 10 say they have excellent or very good experiences with Hoteliers over the past 6 months.

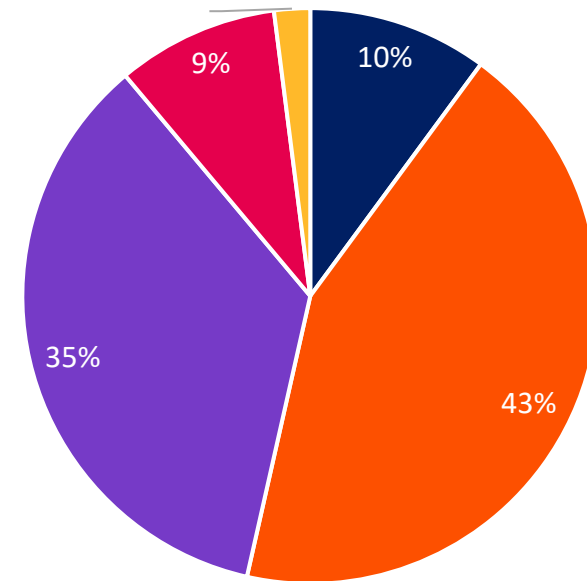
## Partnerships with Incentive Planners - Hoteliers

*Please select the option below that best describes the level of partnership your organization generally has with Hoteliers*



- Excellent – trusted parties engaging respectfully
- Fair– usually positive but occasional challenging dynamics
- Needs improvement – challenging to collaborate for a good outcome

*Generally speaking, how would you rate the experience you have had with Hoteliers for your group incentive travel programs over the past 6 months?*



- Excellent
- Very good
- Good
- Fair
- Poor

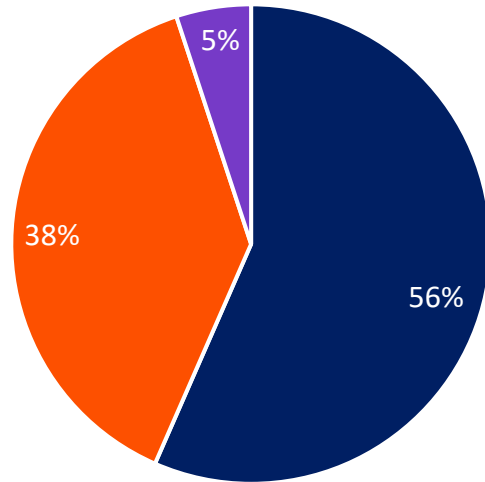




▶ Nealy 6 in 10 Planners say that they have excellent relationships with Tourism Boards, CVBs, and DMCs, and that they are trusted parties who engage respectfully. The majority say they have excellent or very good experiences working with these groups over the past 6 months.

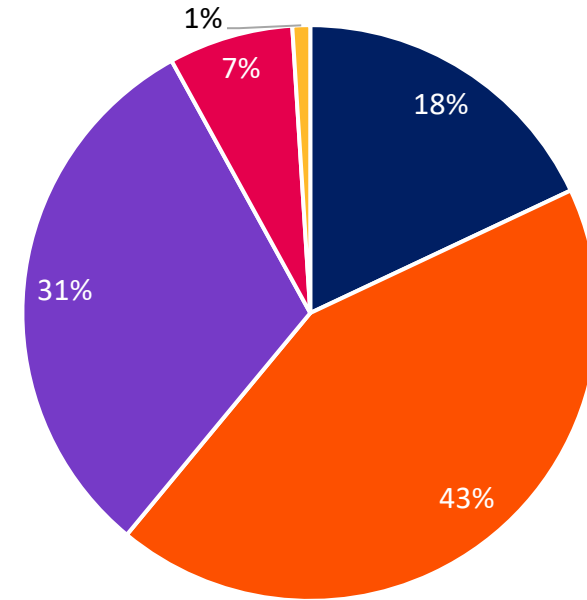
## Partnerships with Incentive Planners - Tourism Boards, CVBs, and DMCs

Please select the option below that best describes the level of partnership your property generally has with **Tourism Boards, CVBs, and DMCs**



- Excellent – trusted parties engaging respectfully
- Fair– usually positive but occasional challenging dynamics
- Needs improvement – challenging to collaborate for a good outcome

Generally speaking, how would you rate the experience you have had working with **Tourism Boards, CVBs, and DMCs** for your group incentive travel programs over the past 6 months?



- Excellent
- Very good
- Good
- Fair
- Poor



# ▶ What Hoteliers Need to Know

## Planners' perspective

Key messages to Hoteliers :

- COVID-related 'excuses' are not an excuse that consumers are willing to take. They expect business to be functioning in line with pre-covid times.
- Higher cost of the accommodation sets a much higher expectation from the customer - they expect an excellent service for the price.
- Staff shortage is the main problem that impacts customers' satisfaction and services.

What do you think Hoteliers should know about your incentive business moving into the next 18 months?

"Be aware that certain industries will be affected by price increases and the overall economy. **Great service is a must, and that standard must be kept up**"

"That clients have set higher expectation levels on delivery because of the extremely high pricing."

"Be prepared for the tough questions. Be prepared for the specifics of the program. Service is key. Stop making excuses."

"Attendee expectations are just as high as pre-pandemic levels.."

continue to be honest and transparent with clients. do not over promise things just to get business.

"Covid is no longer an excuse compensating for service levels and/or decreased infrastructure..."

"We are at a time where if the expected services aren't available (reduced housekeeping/room service, etc.) then the resort fee or room rate needs to start reflecting that. Customers have been patient, but that is definitely growing thin.."

"The staffing shortage is having a huge impact on service levels..."



# ▶ What Tourism Boards, CVBs, and DMCs Need to Know

## Planners' perspective

Key messages to Tourism Boards, CVBs, and DMCs :

- COVID-related 'excuses' are not an excuse that consumers are willing to take. Expectations are now just as high as pre-pandemic.
- Booking incentives and creative destinations are what clients are looking for.

What do you think Tourism Boards, CVBs, and DMCs should know about your incentive business moving into the next 18 months?

"Clear and complete proposals are important - we always work with DMC partners for international destinations."

"Expectations are set at pre-covid levels; providers need to be transparent in regard to delivery realities."

"Clients are selecting destinations that are giving booking incentives and are offering exceptional service."

"Continue to come up with unique ways to market your destinations - ways that are beneficial to the incentive house and the end users"

"We count on you to know what's new and different in your destination. Being creative is how you differentiate yourself from the competition."

"Expectations are higher post-pandemic but also decisions or requests asked from stakeholders seem to be later than pre-pandemic."

"Continue to add staffing to DMC's but they need to be qualified staff or need to have leadership training them and overseeing their work. Need to have clarity in pricing and be proactive in working with the 3rd party to ensure the best experience for our client while also watching their budget. Creativity continues to be important. Turnaround times from clients are worse than they ever have been we all need to staff to that in order to respond."



# ▶ Feedback for Improvement

## Planners' perspective

What would you like to see improved as it relates to incentive travel?

Key feedback for improvement

- Additional customer rewards and benefits
- Sustainability initiatives

"Efforts to increase sustainability in incentive travel, offset carbon, travel less far, etc"

"Access to exclusive and VIP experiences that create a sense of exclusivity and reward for incentive travel participants."

"Travel incentives are used to motivate employees' work enthusiasm and enthusiasm, and improve their work efficiency and quality.."

"Collaborative and consultative approach from incentive travel providers, involving incentive planners in the decision-making process."

"Efforts to increase sustainability in incentive travel, offset carbon, travel less far, etc."

"Expansion of networking opportunities and facilitated connections among incentive travel participants to foster relationship-building.."

"One area of improvement for incentive travel is the incorporation of sustainability initiatives. Consider environmental impact. With growing concerns about climate change and the desire for companies to adopt sustainable practices, there is a need to make incentive travel more eco-friendly."

"I think right now finding the right amount of help and staff to effectively accommodate groups is the biggest point of improvement needed. With the demand for travel coming back with a bang, staff shortages is what is most felt across the board."

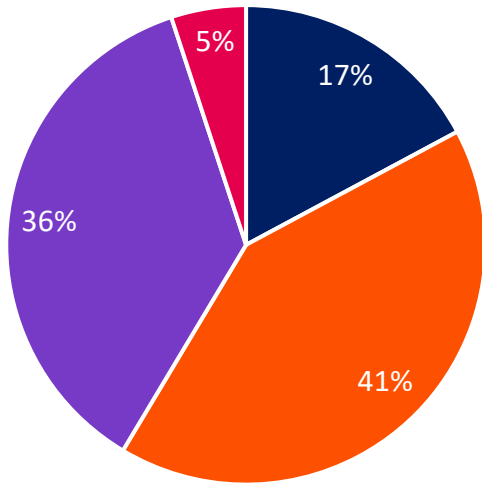
▶ The majority of Hoteliers, Tourism Boards/CVBs & DMC have increased, or maintained their staffing levels since 2019. 1 in 10 DMCs are not planning on reaching 2019 staffing levels in the foreseeable future.

# Staffing

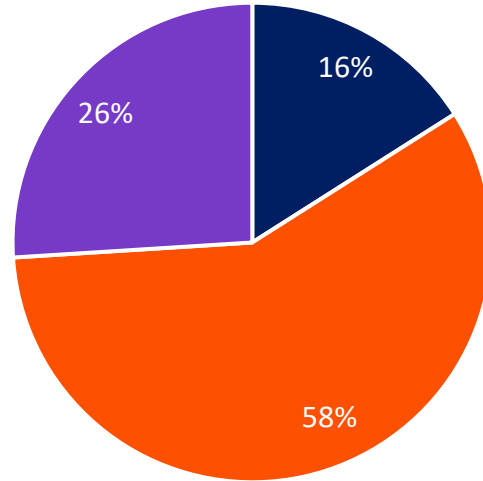
How does your current staffing compare to 2019 levels?



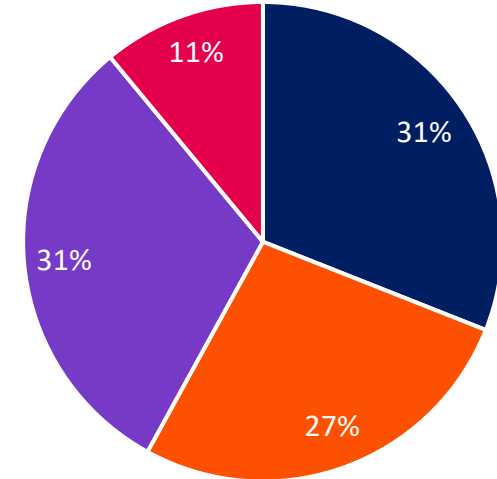
Hoteliers



Tourism Board/  
Convention/Visitors Bureau\*



Destination Management  
Companies



■ We have more staff now than 2019

■ We have the same number of staff now compared to 2019

■ We are working to staff up to 2019 levels

■ We are not planning to staff up 2019 levels in the foreseeable future

■ We have more staff now than 2019

■ We have the same number of staff now compared to 2019

■ We are working to staff up to 2019 levels

■ We are not planning to staff up 2019 levels in the foreseeable future

■ We have more staff now than 2019

■ We have the same number of staff now compared to 2019

■ We are working to staff up to 2019 levels

■ We are not planning to staff up 2019 levels in the foreseeable future

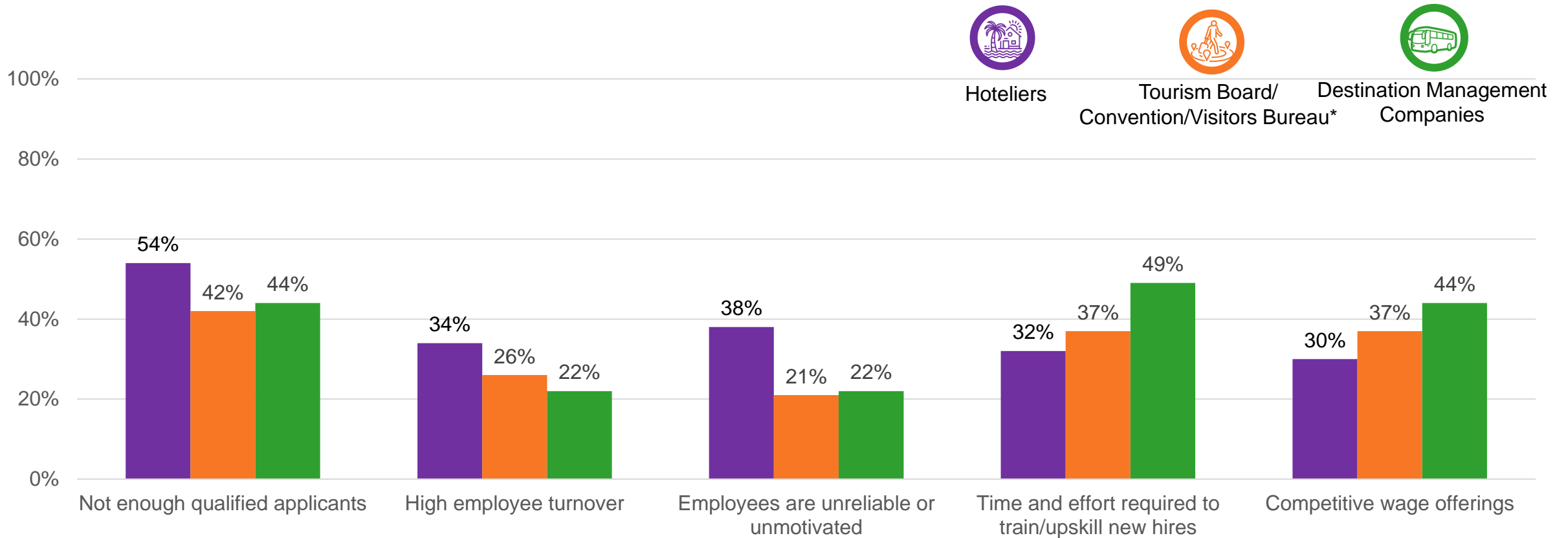
\* Low sample size



▶ Hoteliers are most likely to face a number of challenges when it comes to staffing, especially unreliable or unmotivated employees. While DMCs are the ones with more challenges around training new hires.

## Challenges in Staffing

*Are you encountering any specific challenges or obstacles in managing your staffing levels?*

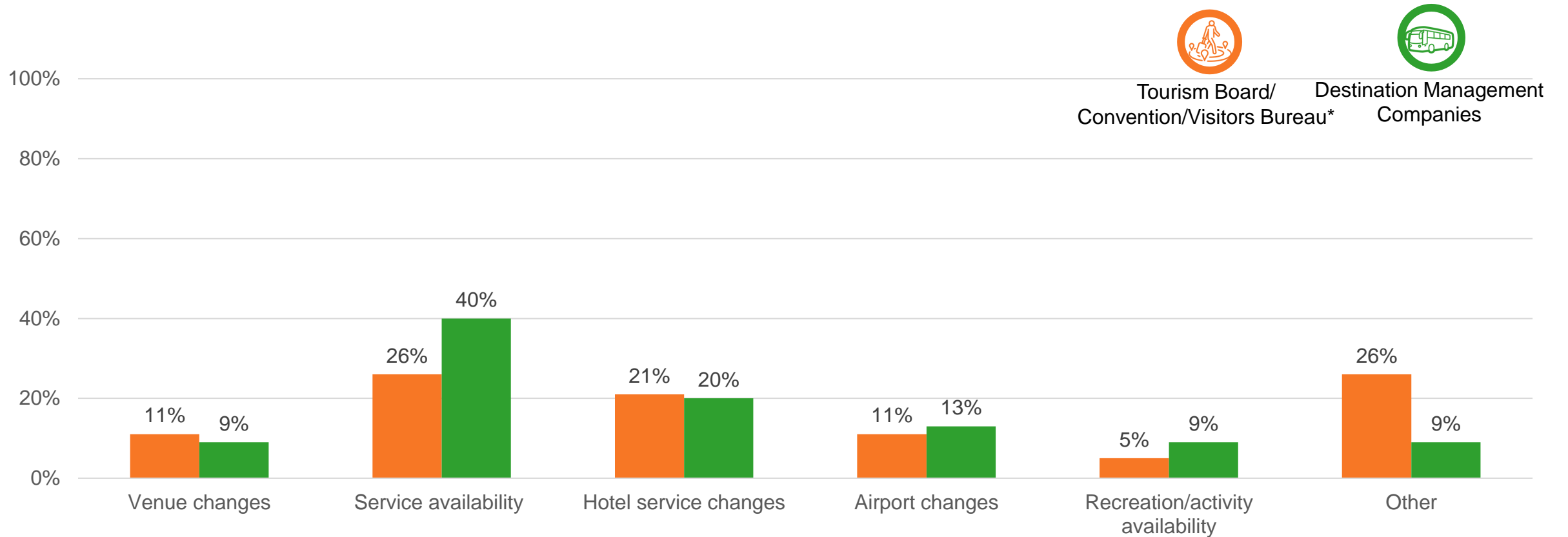


\* Low sample size

▶ Key challenges to anticipate are centred around service availability & service changes

## Challenges

What are the biggest challenges that event organizers need to anticipate in the next 18 months?



\* Low sample size



▶ 6 in 10 in all groups say that they have excellent relationships with their planners and that they are trusted parties who engage respectfully.

## Partnerships with Incentive Planners

Please select the option below that best describes the level of partnership your property or portfolio/chain generally has with incentive planners.



Hoteliers



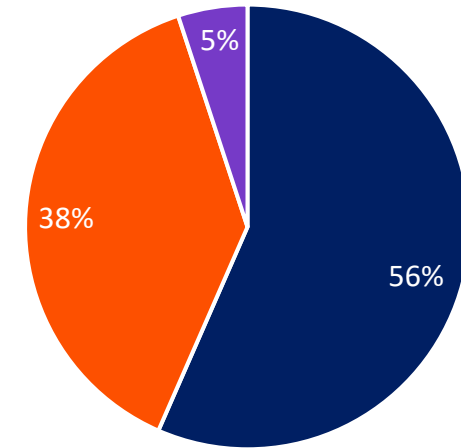
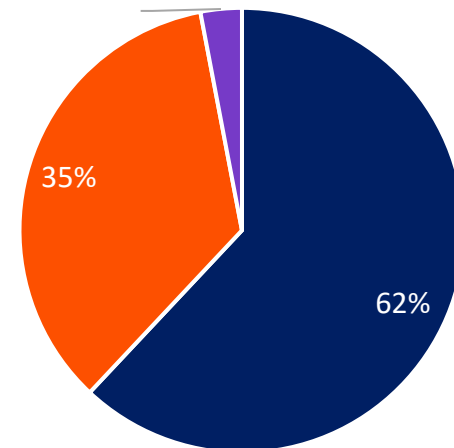
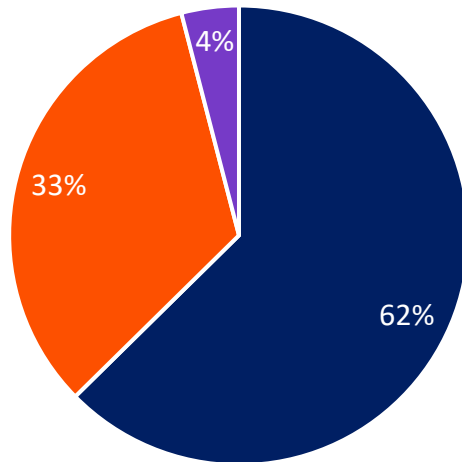
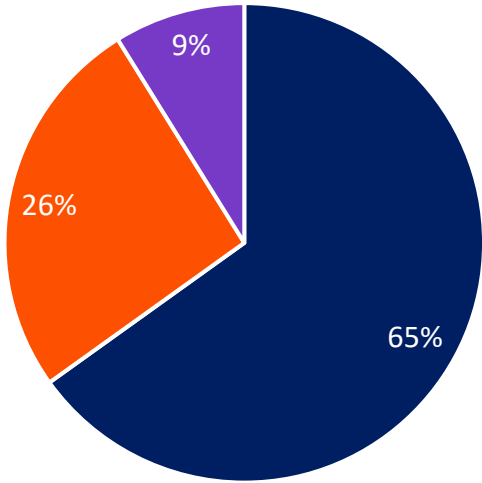
Destination Management Companies



Incentive Planner Hoteliers



Incentive Planner Tourism Board/ Convention/Visitors Bureau\*



Excellent – trusted parties engaging respectfully  
 Fair – usually positive but occasional challenging dynamics  
 Needs improvement – challenging to collaborate for a good outcome

\* Low sample size



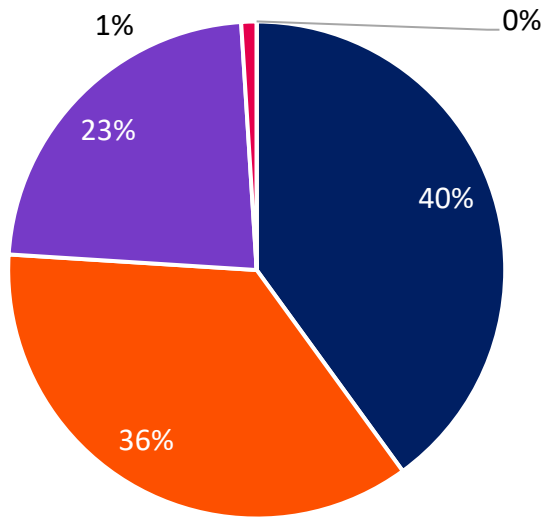
▶ A similar proportion of Hoteliers and DMCs say they have excellent or very good experiences of providing group incentive travel programs over the past 6 months, the proportion is much lower among incentive planners.

## Partnerships with Incentive Planners

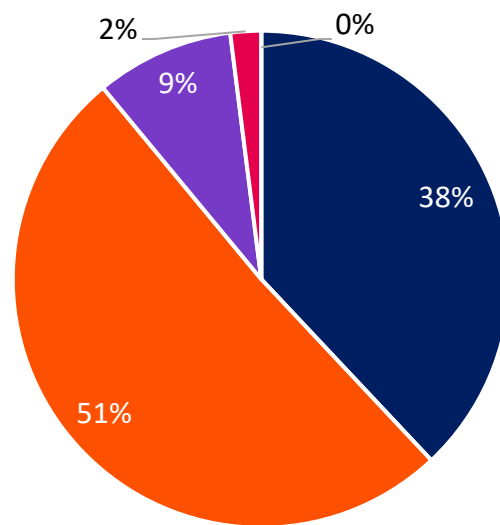
Generally speaking, how would you rate the experience you have been able to provide group incentive travel programs over the past 6 months?



Hoteliers



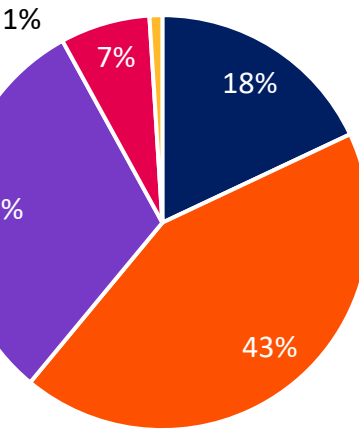
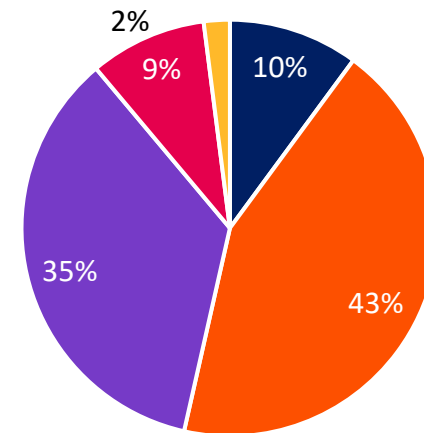
Destination Management Companies



Incentive Planner

Hoteliers

Tourism Board/  
Convention/Visitors Bureau\*



■ Excellent 
 ■ Very good 
 ■ Good 
 ■ Fair 
 ■ Poor 
 ■ Excellent 
 ■ Very good 
 ■ Good 
 ■ Fair 
 ■ Poor

\* Low sample size



# Incentive Industry Trends: IRF Research

June 2023

---