



2024 ATTENDEE PREFERENCES FOR INCENTIVE TRAVEL: How the Right Destinations and Good Program Design Boost Employee Motivation

Introduction

The effectiveness and impact of incentive travel programs are a direct result of the immersive, experiential nature of the reward. Destination choice and features are crucial to the design of a high-impact program, and considerations for location features, past travel destinations, cost, and recommendations of others combine to affect the attendee response to the trip. *2024 Attendee Preferences for Incentive Travel: How the Right Destinations and Good Program Design Boost Employee Motivation* examines the role of destination appeal and value to participants as well as the influence of key features and experiences of trip design. The study also explores differences between preferences and real bookings for destinations.

Key findings include:

- The appeal of incentive travel is very high; even the least-preferred trip destinations and features are appealing and motivating to attendees.
- 2024's top North American leisure destinations preferred by qualified employees include past favorites such as **Hawaii, Las Vegas, and Florida**.
- Preferred international locations for leisure include countries in **Western Europe** and **Central America**.
- Previously visited destinations that qualified employees recommend returning to for incentive award travel include **Hawaii, the Caribbean, Central America, and Western Europe**.
- Event booking data illustrates **Mexico** and **the Caribbean** are still trending high for incentive destinations with nine out of the top ten booking destinations being in those regions.
- **Hawaii's** top billing with attendees does not translate to top bookings by planners, illustrating a common gap between attendee preference when given no limits and the trade-offs planners face when designing and operating programs with real-world considerations.

Beyond destination preference, program designers work to address the interests of participants for activities, experiences, and unstructured time. Attendees prefer unique experiences, varied activities, and provision of sufficient finances for the trip, with costs covered for any extras.

Another trade-off between attendee preference and program design realities emerges in the length of the trip. Attendees generally hope for longer trips than planners are booking, particularly for trips outside of North America. And although extensions are down somewhat since the 2023 survey, 57% of attendees continue extend their trips, split evenly between pre-trip and post-trip extensions.

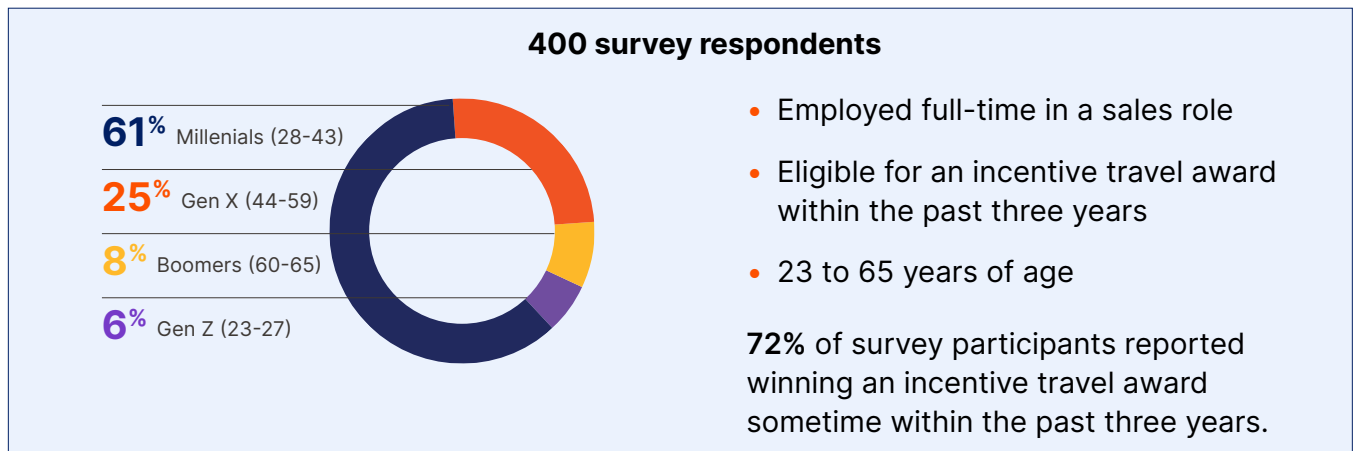
The 2023 study saw a rebound of cruises booked for incentive travel programs. In 2024, attendee perceptions of cruise ship safety and comfort continue to rise. Three-quarters of the 2024 study's respondents agree that a cruise experience is desirable regardless of the destination.

After the post-pandemic rebound in incentive travel seen in 2023, there is likely to be some stabilization of destination and design preferences as attendees and planners settle into business as usual. Early returns to incentive trips prioritized domestic destinations and properties ready to accommodate requirements for safety and service. With increasing distance from the peak of the pandemic there is less variability in safety and service readiness and generally higher comfort levels for international destinations, and attendees are signaling they're ready to travel.

Methodology

The current survey was conducted in March 2024 and is the fourth consecutive year of examining incentive travel program participant preferences. The 2024 study sample included 400 survey respondents employed full-time in a sales role. Participants in the 2024 survey were 23 to 65 years of age and were eligible for an incentive travel award within the past three years. Seventy-two percent of participants reported they had won an incentive travel award in that time period.

One difference between the 2023 and 2024 surveys is the age distributions. Whereas the 2023 survey participants were 21 to 75 years of age at the time of the survey, the 2024 participants were targeted to be 23 to 65 years of age. The 2024 age distribution provides a more focused scope and the difference in response distribution should be noted when evaluating trends.



Net scores used in prior years have been replaced in 2024 by 'overall' scores, which combine survey respondent selections of the two top tier survey options; this implies utilizing strong sentiments as indicated by a rating of 'very' or 'extremely' preferred for the item presented.

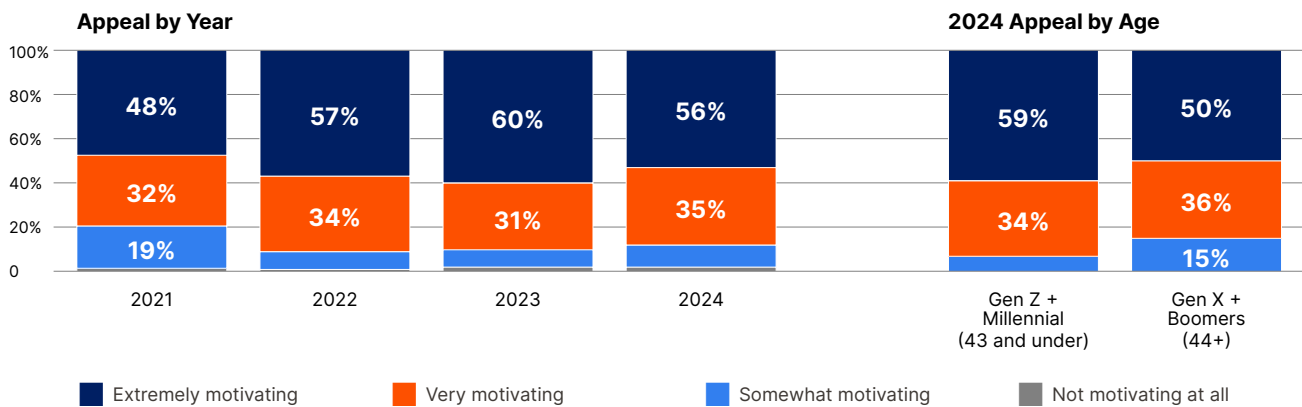
The 2024 study includes experience design and destination focus as well as additional elements to address participant perceptions. This version also includes a portion committed to participants who previously visited a popular destination to assess interest in returning and recommending the destination as an incentive award trip.

Incentive Travel Awards Continue to Have High Motivational Appeal

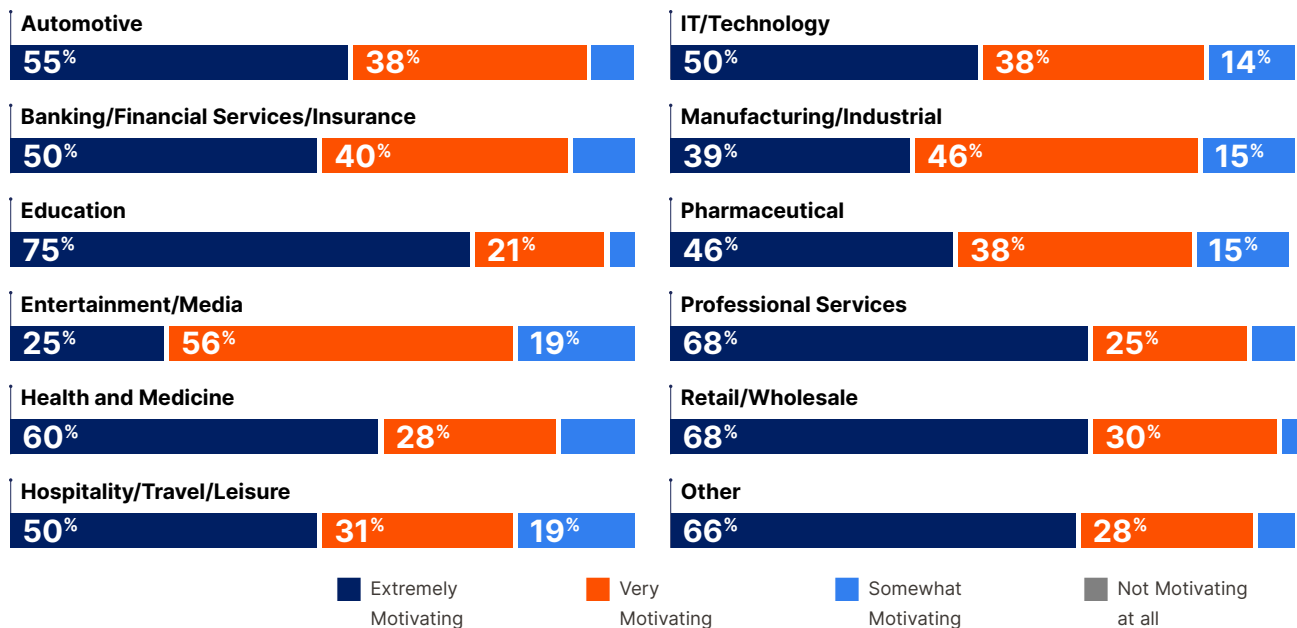
Reward opportunities for group travel can be highly motivating, and there is a continued strong appeal of group incentive travel in 2024. Participants regard incentive travel to appealing destinations as very high value.

For the third year in a row, 91% of respondents describe a group incentive travel experience to an appealing destination as ‘very’ or ‘extremely motivating.’ While appeal is very high across all segments of comparison, younger age groups (Gen Z + Millennials) find even greater motivation in group incentive travel than the older age groups (Gen X + Boomers), who have likely had opportunities to experience more travel programs during their work tenure.

Figure 1: Appeal of Group Incentive Travel



The perceived value by industry was greatest for those in health and medicine professions, education, retail/wholesale, and other industries, while slightly lower for those in the entertainment/media industry. Recent travel award winners are also more likely than non-winners to find greater value in an incentive travel award to an appealing destination.

Figure 2: Appeal of Group Incentive Travel by Industry

Priorities of the Most Motivating Incentive Trips: Time to Relax & Flexibility

Having ample opportunity for free time is of the greatest importance for incentive award trips again in 2024. The interest in unstructured time and relaxation have remained a top priority year over year. Relaxation time is highly preferred by 84.5% of respondents who said this option is 'extremely' or 'somewhat' important. Second in priority this year is the opportunities to have unique experiences.

Priorities for creating positive trip experiences are similar to previous years, with participants seeking:

- Free time to relax
- Opportunities for unique experiences
- Luxury accommodations and experiences
- Spending money provided for 'extras' and coverage of out-of-pocket costs
- Ability to bring along a guest
- Opportunity to experience a unique culture

It's important to note that all of these design elements appeal to a majority of attendees. Although ranked sixth in terms of attendee priority, the desire to experience a unique culture is rated highly by nearly three out of four survey respondents. The higher-rated opportunities for unique experiences shine additional light on the trend of travelers looking for uniqueness in their trips and seeking experiential travel in their destinations and activities.

Of lower interest to attendees are opportunities to be recognized in front of peers and having abbreviated travel time to arrive at the destination.

Significant changes in the overall importance of trip components occurred from 2023 to 2024. Of the biggest movers, receiving luxury accommodations and experiences is of greater importance to incentive award travelers than in the past, further illustrating the interest in luxury attributes of a travel program.

- Receiving a merchandise gift rose 8.5% points (55% in 2023 to 64% in 2024).
- Receiving luxury accommodations and experiences rose 7.5% points (72% in 2023 to 80% in 2024).

Figure 3: Top Drivers of Positive Incentive Experience



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

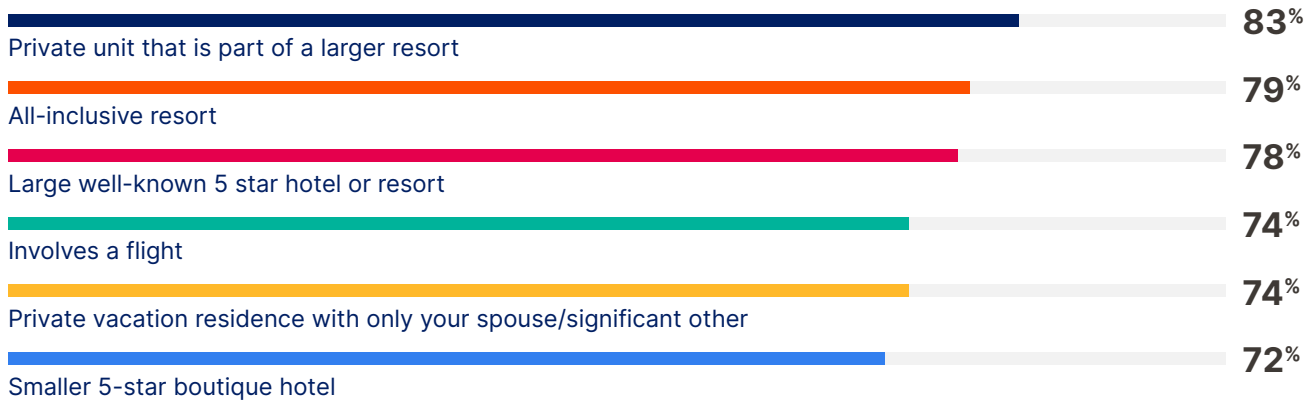
Features or activities of incentive award trips were rated by respondents for appeal. Selecting trip attributes that participants find 'extremely' or 'somewhat' appealing makes up the overall appeal.

In following up with the desire for a trip that provides time to relax, the most appealing features are associated with relaxation and lean toward large resort accommodations and amenities. Staying in a private unit that is part of a larger resort is considered the most attractive option, appealing to 83.3% of respondents.

Features receiving high ratings for appeal are:

- Staying in a unit that is part of a larger resort (increased in appeal by 10.3% points from last year)
- Opportunities to relax and disconnect (e.g. pool, nature views, free time)
- Staying in an all-inclusive resort
- Staying in a large, well-known 5-star hotel or resort

Figure 4: Appealing Features of Incentive Trip Accommodations



*How appealing or unappealing are each of the following as features or activities associated with an incentive award trip
Extremely + Somewhat Appealing*

Figure 5: Appealing Features of Incentive Trip Activities



*How appealing or unappealing are each of the following as features or activities associated with an incentive award trip
Extremely + Somewhat Appealing*

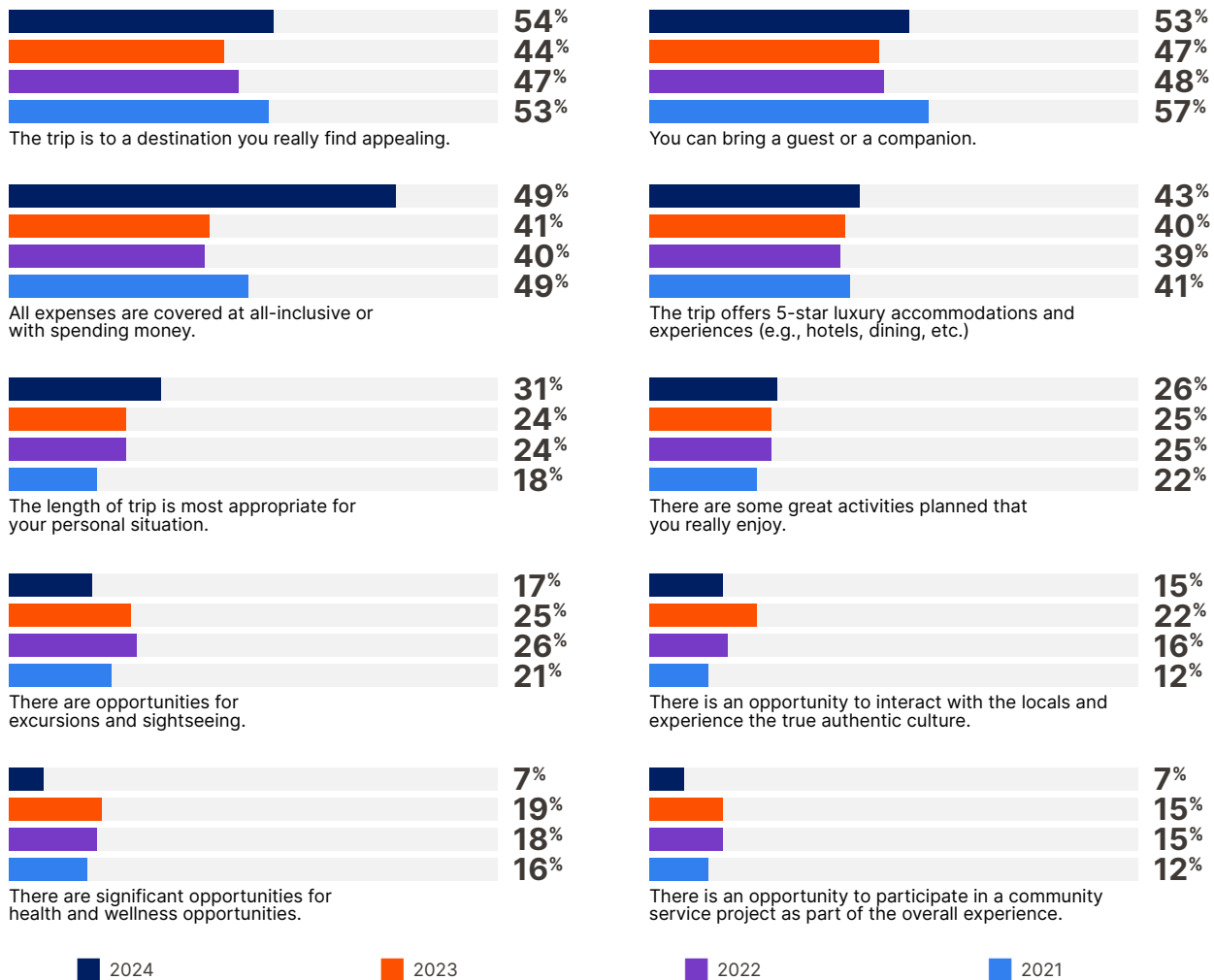
While still appealing to more than half of attendees, being able to drive to the destination and opportunities to mingle with large groups of people had the lowest relative appeal among the attributes tested. Although still relatively low on the preference list, opportunity to mingle with large groups of people did rise in appeal (+6.2% points) over the previous survey, perhaps impacted by the increasing distance from peak-pandemic concerns about large group exposure.

Features that showed the largest decrease in appeal were the opportunity for unique culinary activities (-8.5% points), followed by a trip to the mountains or another remote area (-7.1% points).

To help differentiate among trip features that are broadly appealing, attendees were asked to rank aspects of incentive trips that have a direct impact on their motivation to earn. An appealing destination, ability to invite a guest, and all-inclusive trips are the top three motivating factors in trip design. All three of these saw increased importance as a top three item from 2023 to 2024.

- An appealing destination ranked in the top three 54% of the time, up 10% points.
- Being allowed to bring a guest or companion ranked in the top three by 53% of respondents, up 6% points.
- Having an all-inclusive trip or expenses are covered with spending money ranked in the top three 49% of the time, up 8% points.

Figure 6: Preferred Features of Incentive Trips % Rank Top 3



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

Notable shifts were also evident within trip design factors least impactful to respondent motivation.

- Opportunities to participate in a community service project ranked in the top three only 7% of the time, down 8% points from the previous year.
- Health and wellness activities ranked in the top three by only 7% of respondents, down 12% points.
- Having an opportunity to interact with authentic, local culture ranked in the top three 7% of the time which is a 12% point decrease from the prior year.

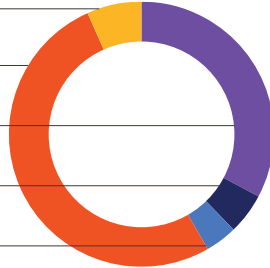
Length of Trip: North America Shorter than International

Ideal trip length varies between destinations within North America and international locations. The ideal duration for North American destinations is shorter than trips for international destinations. North American trip lengths of 4-6 days are preferred for the majority (52%), which is up 7% points from the 2023 study. A considerable percentage of attendees would prefer longer domestic trips, with 42% of respondents indicating the ideal length for North American travel would be seven or more days. For international trips, most respondents (83%) feel seven or more days would be ideal.

Figure 7: Preferred Length of Incentive Trip

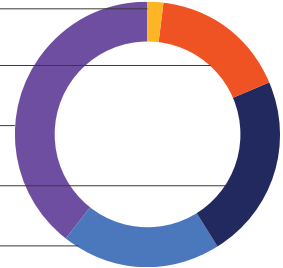
Within North America

7%	1 - 3 days
52%	4 - 6 days
33%	7 - 10 days
5%	10 days
4%	Over 10 days



International

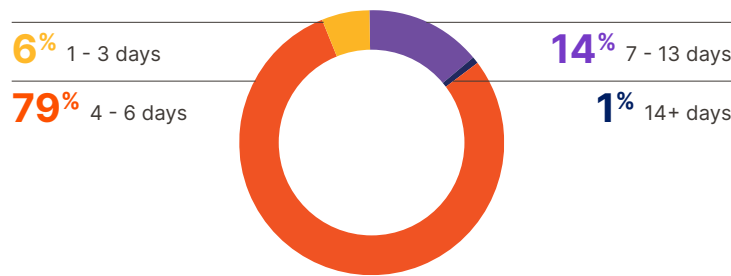
2%	1 - 3 days
17%	4 - 6 days
40%	7 - 10 days
23%	10 days
20%	Over 10 days



Trip duration is a design consideration for which planners are challenged to balance attendee preference with budget and business realities. Cvent data indicates that most trip bookings (79%) are between four and six days, with only 15% of trips scheduled for a week or more.

- In continuation of previous trends, 1 to 3-day trips have declined again in 2024 (6%) from 2023 (11%).
- For the second year in a row 4 to 6-day trips make up 79% of bookings.
- An increase was noted for 7 to 13-day trips, rising from 9% in 2023 to 14% in 2024.
- 14+ day bookings remain very low, around 1%.

Figure 8: Actual Length of Incentive Trips

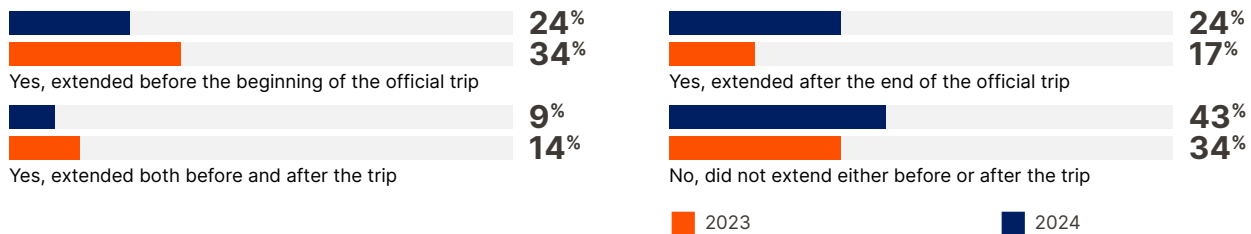


Booking Data Provided by Cvent

Even though the rate of trip extensions is down from 2023, more than half of attendees extend their stay. Extensions are evenly split between pre- and post-trip, with a small percentage extending both ends of the trip dates.

- More than half (57%) chose to extend either before or after their booking dates,
- Under a tenth (9%) include an extension of the trip both before and after their incentive travel duration

Figure 9: Incentive Trip Extensions



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

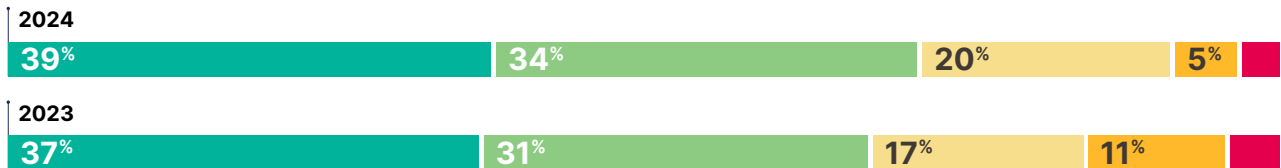
Increased Interest in Incentive Travel Cruising

Cruises continue to trend up in popularity extending the post-Covid era comeback. Data from 3-D Cruise Partners showed a 36% overall increase in cruise line quotes from 2022 to 2023. This pace looks to continue, with year-to-date bookings as of 2024 only slightly behind 2023. Overall perceptions have improved year over year with both the safety and comfort of cruise ships showing improvements of 5% points. Nearly three-quarters of respondents (73%) feel that cruise ships provide a safe and secure environment and slightly more (77%) agree that a cruise ship provides all the comforts of a luxury hotel.

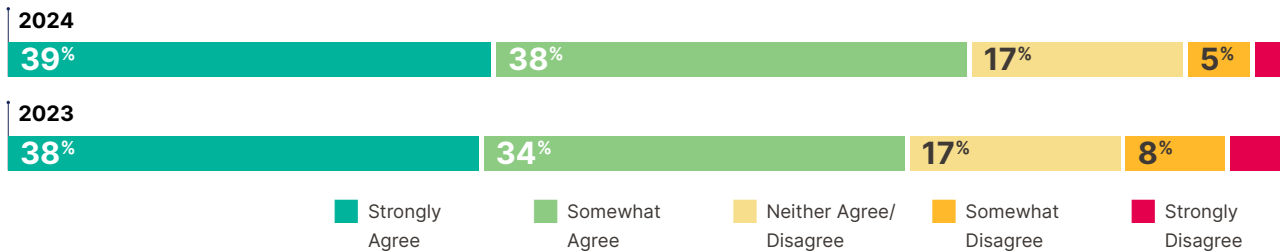
The appeal of a cruise as an incentive experience across destinations; 75% of attendees felt the cruise experience is desirable regardless of the destination - a growth of 10% points over the 2023 survey.

Figure 10: The Cruise Ship Experience

Cruise ships provide a safe and secure environment.



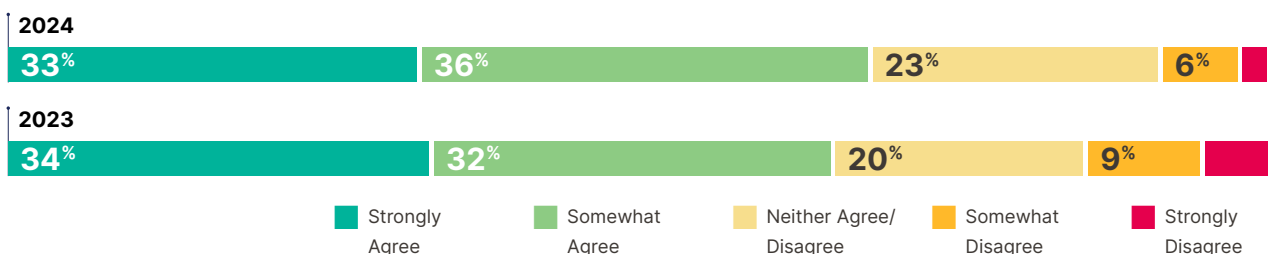
Cruise ships provides all the comforts of a luxury hotel.



The cruise experience itself is a desirable destination regardless of where the cruise is scheduled to go.



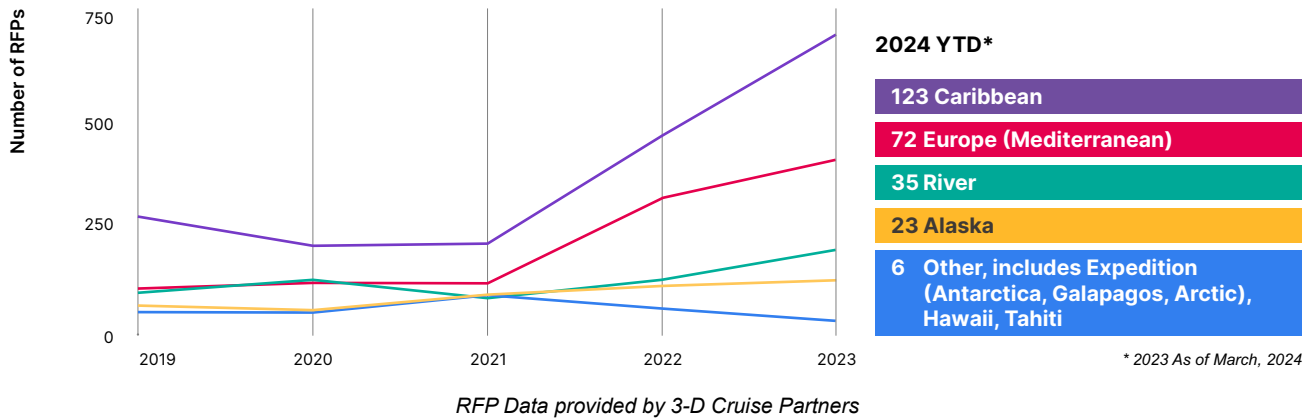
I would prefer to explore multiple ports-of-call internationally by cruise as opposed to one international destination at a hotel.



Cruise quote data reinforces the high appeal of incentive travel cruising:

- 2023 cruise line quotes increased in the Caribbean (+51%), Europe/Mediterranean (+28%), River (+52%), and Alaska (+11%), but decreased in other destinations (-45%).
- Year-to-date numbers project an increase in European (Mediterranean) destinations but a decrease in Alaska and other destinations.
- The Caribbean remains the top cruising destination, followed by Europe (Mediterranean).

Figure 11: Interest in Incentive Cruises is Increasing



Destination Features: Beach & Sunshine Remain on Top

Beach and sunshine destinations remain the top destination feature, consistent with the past three years of data. Beach and sunshine are included in the top three ranking of survey respondents 56% of the time. Each of the top six destinations/experiences display increased popularity from 2023.

- Beach/Sunshine +8%
- Adventure Travel +8%
- Mountains +9%
- Historical Location +8%
- Wooded/Nature Area +8%
- Primarily English Speaking +4%

Top Destination Experience Features

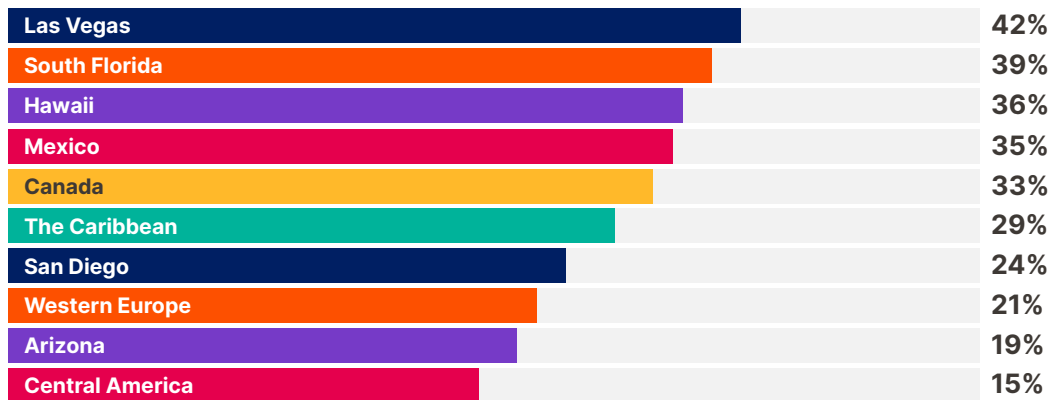


Smaller cities, wellness spas, shopping, and large metropolitan areas are the least likely to be ranked among the top three destinations/experiences. Of the six destinations/experiences that were ranked least frequently in the top three, five have decreased in popularity from 2023 to 2024. Despite the uptick in quotes reported by the cruise industry, attendees were less likely to rank cruising in the top three preferred destinations in 2024, ending the increasing preference trend seen from 2021 to 2023. As with other findings in this year’s study, it is possible this result can be attributed to the full emergence from the pandemic years, during which attendees and planners alike preferred to travel within a much narrower comfort zone than in pre-pandemic years.

Previous Experiences with Destinations

This section was introduced in 2023 and presented again in 2024. Participants were asked about destinations they had visited previously, either for incentive travel or for another reason. Las Vegas topped the 2024 list with 41.8% of respondents reporting a previous visit, and Central America came in last on the list with only 15.3% reporting a previous visit.

Figure 12: Previous Destination Experience



Please indicate whether you have previously visited, either as an incentive travel experience, or for another reason.

Visitors reported leisure as the primary reason for a trip across all destinations. However, Phoenix/Scottsdale was the most common for business, and Central America and Hawaii were reported as the most frequented incentive trips.

- Hawaii, Western Europe, and the Caribbean are most likely to be revisited for leisure travel as well as most likely to be recommended as an incentive travel award destination.

As noted previously, all aspects of incentive travel hold appeal across attendees, including destinations and program characteristics. This study is largely an effort of distinguishing most-appealing program considerations from slightly-less appealing program considerations. A perfect example of this nuance is in attendee's specific interest in returning to a destination for leisure:

- Hawaii (94%), the Caribbean (92%), Western Europe (91%), Central America (90%), and Canada (89%) are most likely to be revisited.
- The lowest rated destinations are still of interest to most respondents, including Mexico (82%) and Phoenix/Scottsdale (80%).

Figure 13: Incentive Destinations Recommendations Based on Previous Experience



*Based on your experiences traveling to ..., how likely would you be to recommend this location as an incentive travel award destination?
Extremely likely + somewhat likely*

Based on prior knowledge and experiences going to a specific destination, travelers share in strong mutual feelings for recommending or dismissing incentive travel reward destinations.

Most likely to be recommended:

- Hawaii (95%)
- The Caribbean (89%)
- Central America (89%)
- Western Europe (88%)

Slightly less likely to be recommended:

- South Florida (75%)
- Phoenix/Scottsdale (76%)
- Mexico (76%)

Hawaii stands out compared to others. With 35.5% of participants stating they have visited, it is one of the top three previously visited destinations for respondents (behind Las Vegas at 41.8% and Southern Florida at 39%) Of those who have traveled to Hawaii previously, 94% have a “great deal” or “some” interest in returning for a leisure visit and 95% would recommend Hawaii as an incentive travel destination.

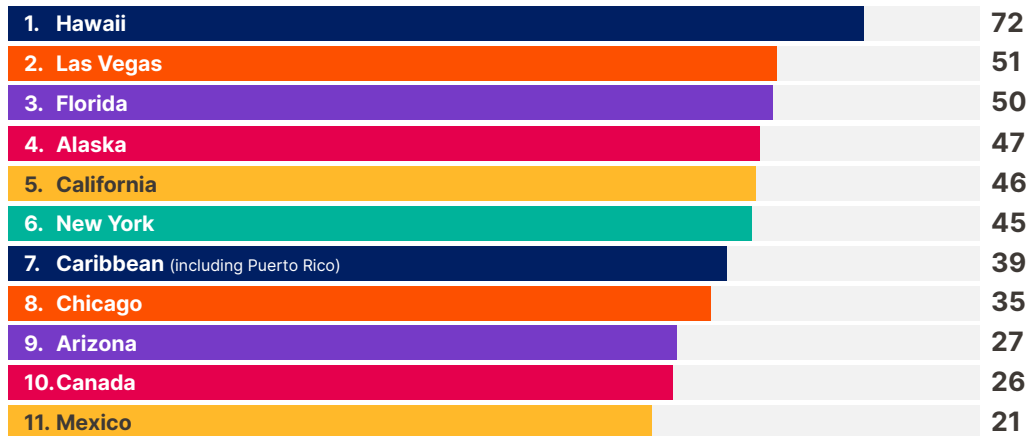
While less likely to have been previously visited by respondents, Central America, Western Europe, and the Caribbean do command high interest in returning for leisure and high likelihood of being recommended for incentive travel award as compared to other destinations.

Destination Preferences: Hawaii Still on Top, Domestic Rising

The Preference Index for incentive award travel destinations is created by the combination of an initial top three and subsequent top two ranking of destinations that spark motivation to meet a target goal. Two separate lists are utilized for scoring, made up of destinations categorized either within North America or as international. A higher index indicates a greater preference as an incentive award trip destination (an index of 100 would indicate that destination was a top-three preference across all 400 respondents).

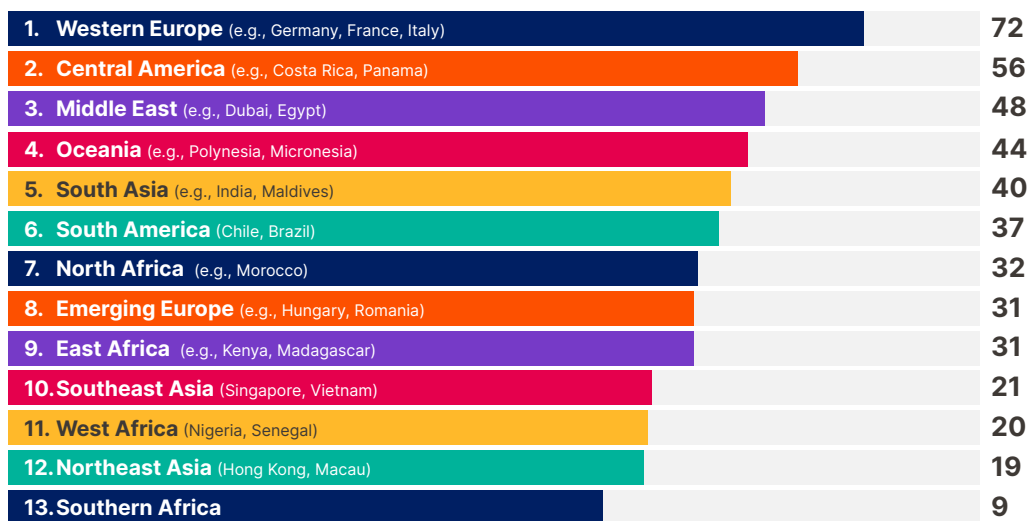
Overall, Hawaii is the leading destination in North America for the fourth consecutive year with a Preference Index of 72. With scores of 51 and 50 respectively, Las Vegas and Florida are also very popular destinations in North America. Las Vegas was also ranked second in 2023. Florida was included as part of the Southern United States in the 2023 survey and ranked sixth in North America. Alaska has moved up four positions since the 2023 survey and displayed the greatest year-over-year increase among North American destinations.

Among the North American destinations evaluated, Mexico (21), Canada (26), and Arizona (27) are the least likely to be selected as a top-three preferred destination. Mexico and Canada declined in ranking since the 2023 survey, moving down four and three spots respectively. In 2023, Arizona was included as part of the then fifth-ranked Southwest United States. However, as a standalone state destination in 2024, Arizona has moved down four positions.

Figure 14: North American Incentive Destination Preferences

For international destination preferences, Western Europe (Germany, France, Italy) remains at the top motivational destinations with a preference index of 72. Central America (e.g. Costa Rica, Panama) (56) and the Middle East (e.g. Dubai, Egypt) (48) also draw interest as international destinations for incentive award travel. While Central America ranked second for a second consecutive year, the Middle East moved up one position from 2023 to third. Moving up four positions each since 2023, South Asia (e.g. India, Maldives) (40) and North Africa (e.g. Morocco) (32) displayed marked improvement.

Among the international destinations tested, West Africa (e.g. Nigeria, Senegal) (20), Northeast Asia (e.g. Hong Kong, Macau) (19), and Southern Africa (9) are less likely to be selected as a top three preference.

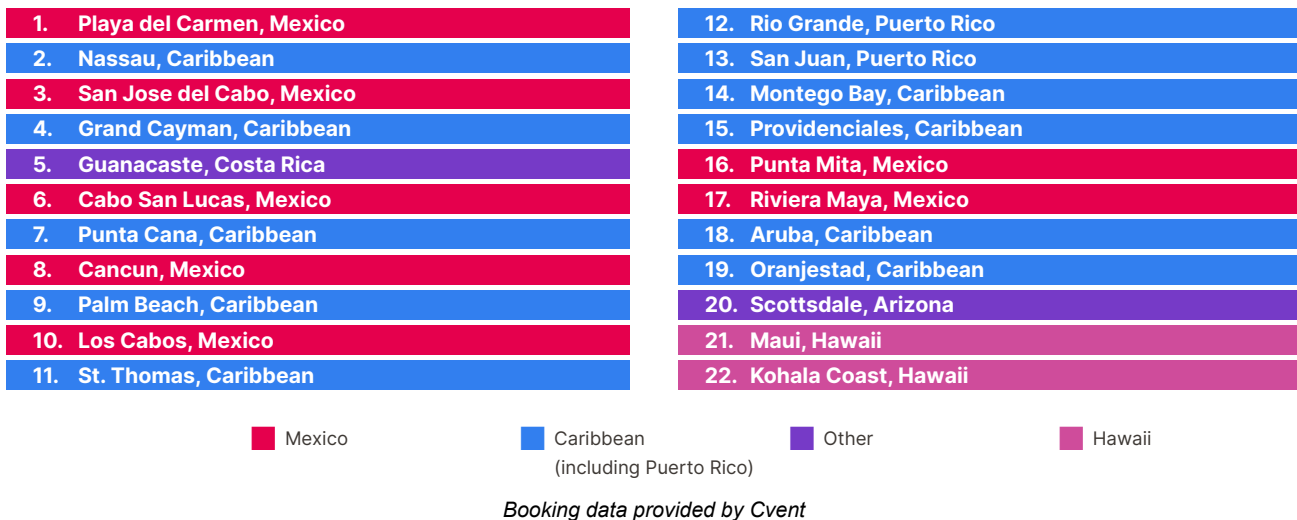
Figure 15: International Incentive Destination Preferences

Western Europe and Hawaii showed similar preference scores and scored well above the second ranked locations in their respective geographical lists.

Preferences vs. Actual Planned Incentive Trips: Cvent Booking Data

Cvent bookings continue to trend toward Mexico and the Caribbean in 2024. Thus far in 2024, nine of the top ten booking destinations are in Mexico or the Caribbean. Playa Del Carmen, Nassau, and San Jose del Cabo remain the top three booked destinations for the third year in a row.

Figure 15: Top Booked Incentive Destinations for 2024



A deeper look at the destinations with the most notable increases (2021 to 2024) in bookings reveals that three of most significant increases are within Mexico:

- Punta Mita (+14 positions in rank)
- Riviera Maya (+11)
- Playa Del Carmen (+3) has been ranked first since 2022 following a ranking of 4th in 2021

Four of the top ten destinations with the most significant increases over the past four years of bookings are in the Caribbean.

- Providenciales (+13 ranks) has steadily improved booking year over year since in 2021
- Punta Cana (+11) has remained a top ten ranking at sixth for the second year in a row
- Aruba (+7)
- Oranjestad (+7)

Two Puerto Rico destinations showed a large uptick in bookings between 2022 and 2023 and are holding steady in 2024. Rio Grande, Puerto Rico, and San Juan, Puerto Rico, moved up respectively nine and six spots on the ranking list since 2021.

Conversely, the destinations with the largest moves down in rankings are largely in the United States. Within the top ten booked destinations in 2024, there are no United States destinations represented. Moreover, a majority of the destinations displaying the most significant booking decreases since 2021 are in the United States. This may be another consequence of a rebound - increasing comfort with international destinations following a few years of pandemic-related travel caution with an associated preference for domestic travel.

Summary and Key Takeaways

- Motivational appeal of group travel continues to be extremely high, especially among Gen Z and Millennials, and signals the continued relevance of incentive travel programs.
- Participants seek a getaway that allows for taking part in unique experiences and luxury accommodations. They also desire to share this opportunity with a guest brought along on the trip.
- Beach and sunshine destinations continue to be highly regarded and align well with a destination that provides a much-appreciated opportunity for downtime to relax.
- For survey respondents, an incentive travel award trip that is four to six days long is considered ideal if staying within North America, while international trips are ideally at least seven days in length. Planners tend to book trips somewhat shorter than preferred by attendees.
- Nearly six out of ten recent winners extend their trips.
- The popularity of cruising continues to grow after the pandemic-related declines. Three-quarters of respondents say cruises are desirable regardless of destination, and improved perceptions of safety and comfort drive up cruising appeal.
- There is a high interest in returning for leisure purposes to Hawaii, Western Europe, and the Caribbean, and also recommending these to others for incentive award travel.
- Similar to last year's responses, survey results indicate interest in a broad range of destinations, while booking data indicates a critical mass of programs focusing on Mexico and the Caribbean for destinations.
- Hawaii was rated high across the board for incidence of previous visits, interest in returning for leisure, and likelihood to be recommended for incentive travel reward. Despite this, bookings realized for Hawaii have been declining for several years and the Hawaiian destinations are not in the top 20 of Cvent bookings.
- Central America, Western Europe, and the Caribbean show high interest in returning for leisure and a high likelihood to be recommended for incentive travel awards as compared to other destinations.

The motivational impact of incentive award travel remains high, and travelers find appeal in a broad array of destinations, program attributes, and trip features. The insights provided by attendees will ensure incentive planners can feel confident in designing programs that capture the interest and enthusiasm of their attendees while balancing their budgetary and business realities.

Thank You to Our Research Advocacy Partner

