

▶ **2025 European Attendee Preferences for Incentive Travel**

Leveraging Program Design and Destination Preferences to Maximize Employee Motivation

March 2025

► Research Overview

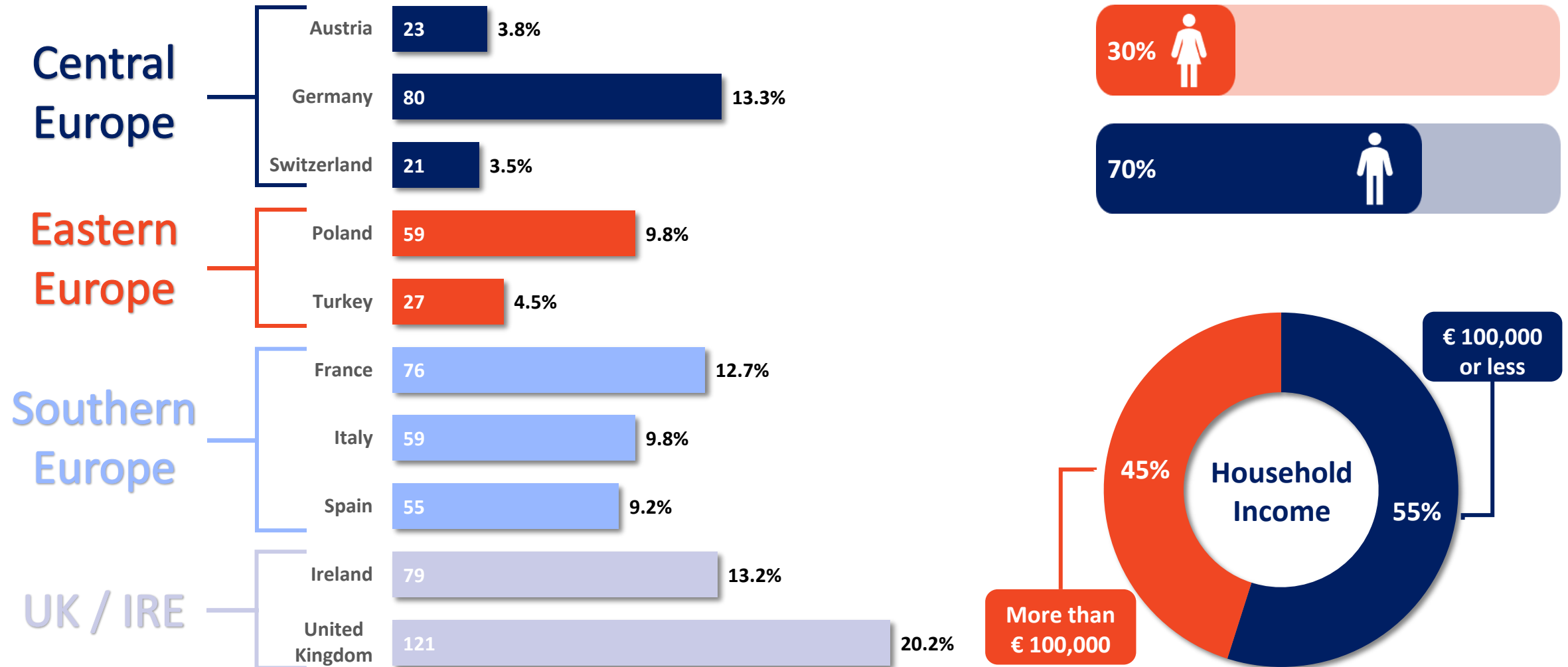
During October and November 2024, the Incentive Research Foundation conducted the first iteration of the European Attendee Preferences for Incentive Travel survey. Modeled after an annual North American study, this survey examines the preferences of incentive travel program participants to provide guidelines for designing motivating and rewarding programs.

Respondents meet the following criteria:

- Employed full-time in a sales or marketing role
- Eligible for an incentive travel award within the past three years
- 23 to 65 years of age

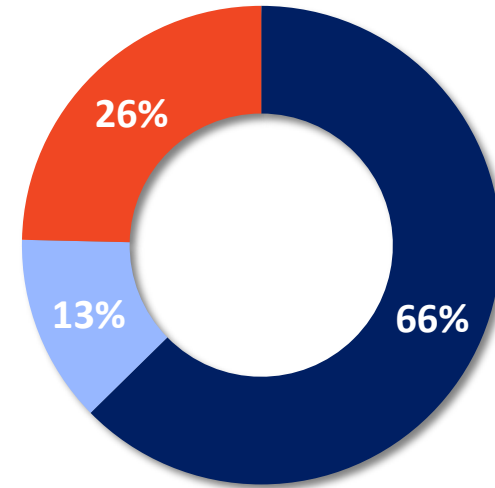
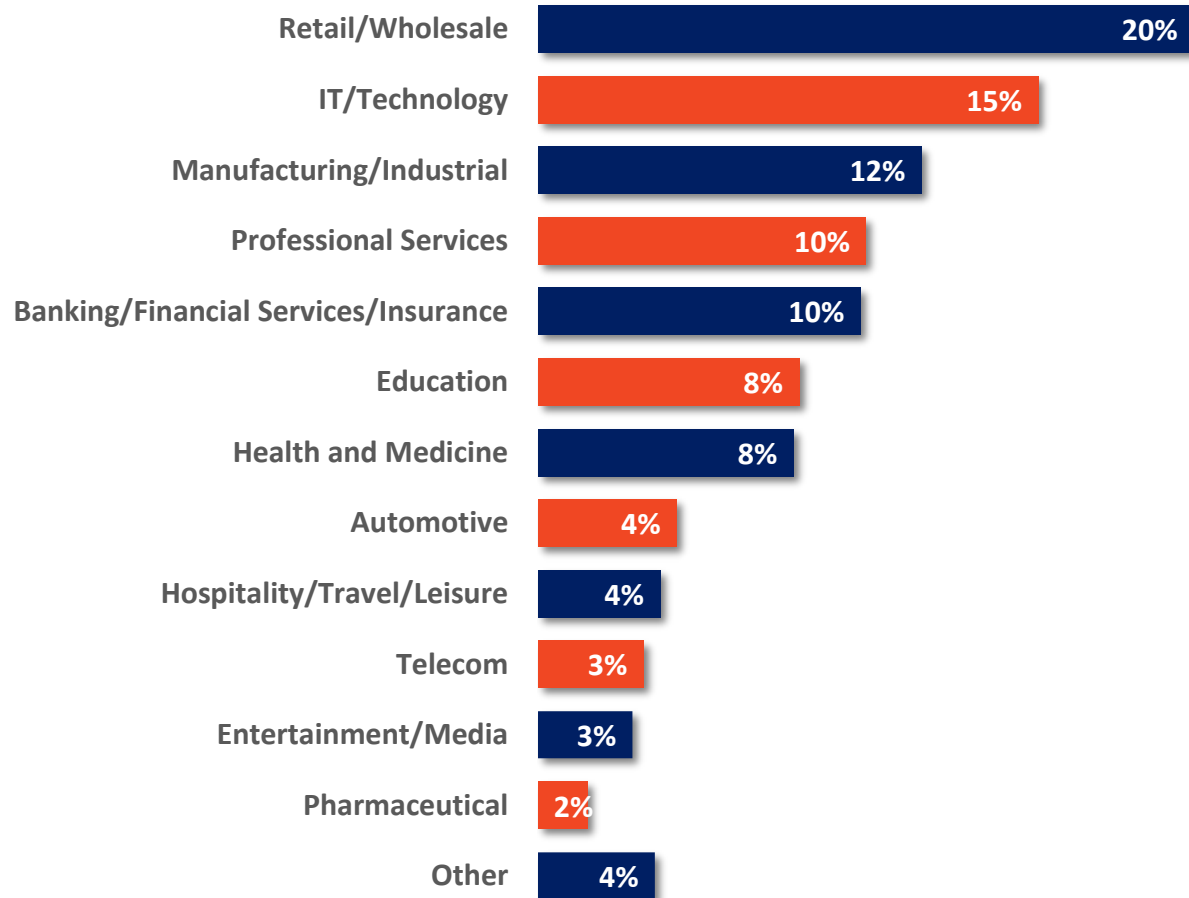


▶ Respondent Profile

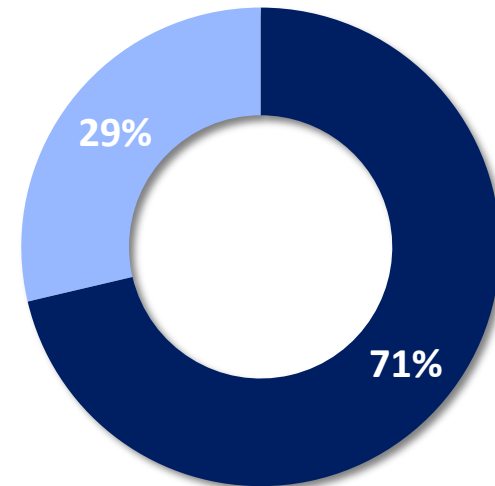


▶ Respondent Profile

Industry



- Have children under 18 living at home
- Have children 18+ living at home
- Have no children living at home



- Gen Z + Millennials
- Gen X + Boomers

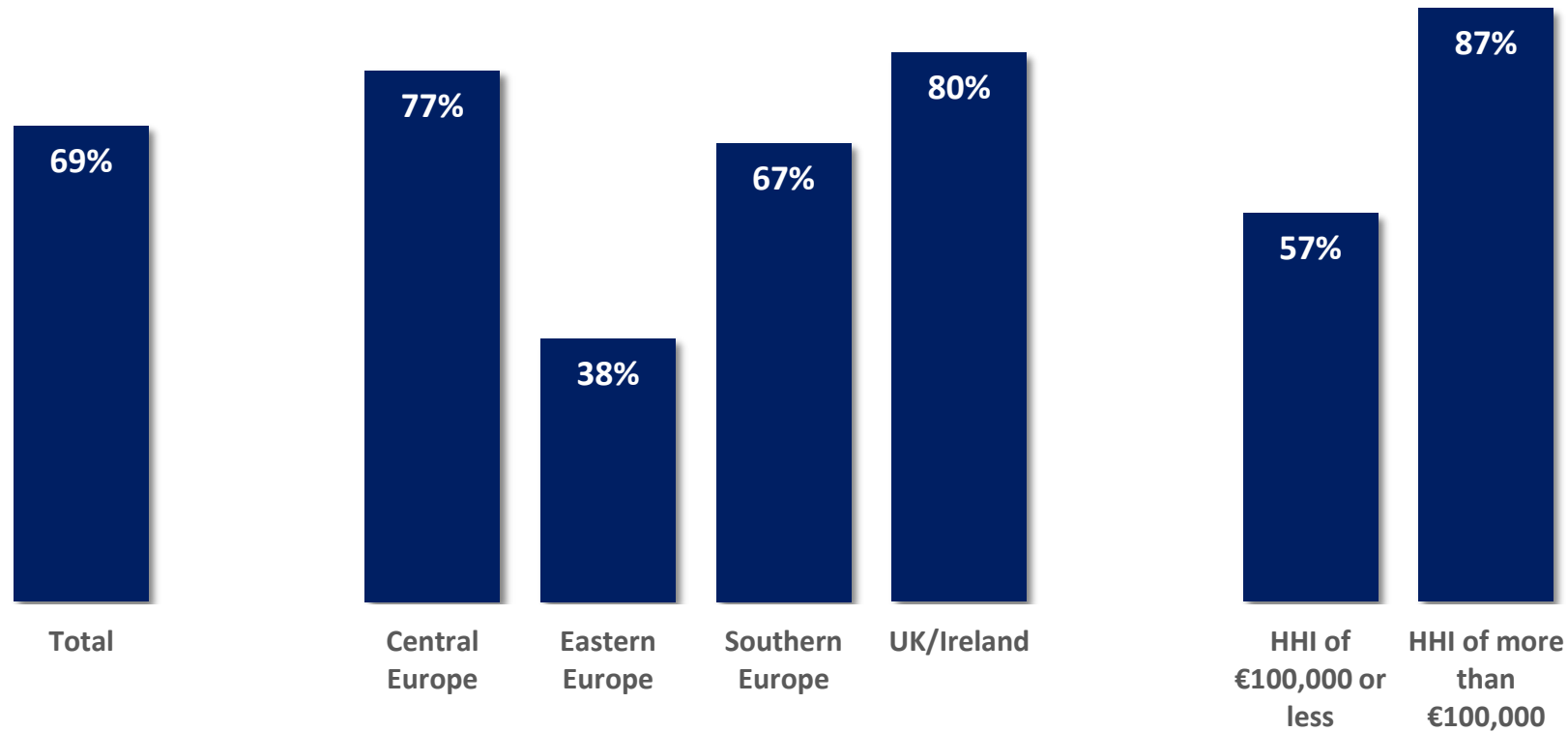


Incentive Travel Experiences

► Frequency of Winning Incentive Travel Award

Recent travel award winners are highly represented in this study.

Incentive Travel Award Win Rates



70% of respondents report winning an incentive travel award, significantly higher than the general program participant population.

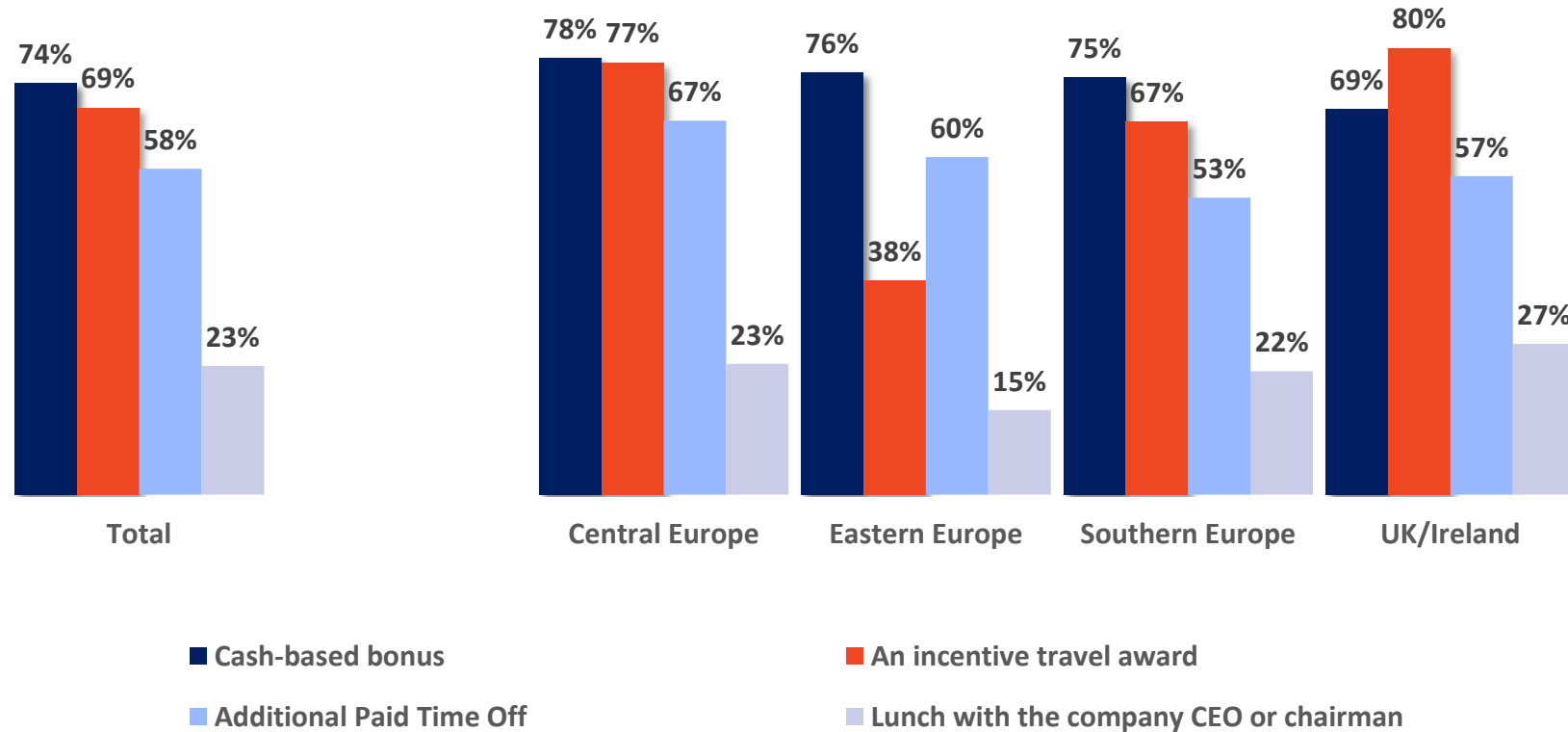
Recent award winners are more heavily represented among higher earners and respondents from Central Europe or the UK/Ireland.

Eastern Europe has a lower representation of travel award winners.

▶ Type of Incentive Awards Won

Cash and incentive travel are the most commonly won performance awards amongst respondents.

Past Incentive Award Winnings



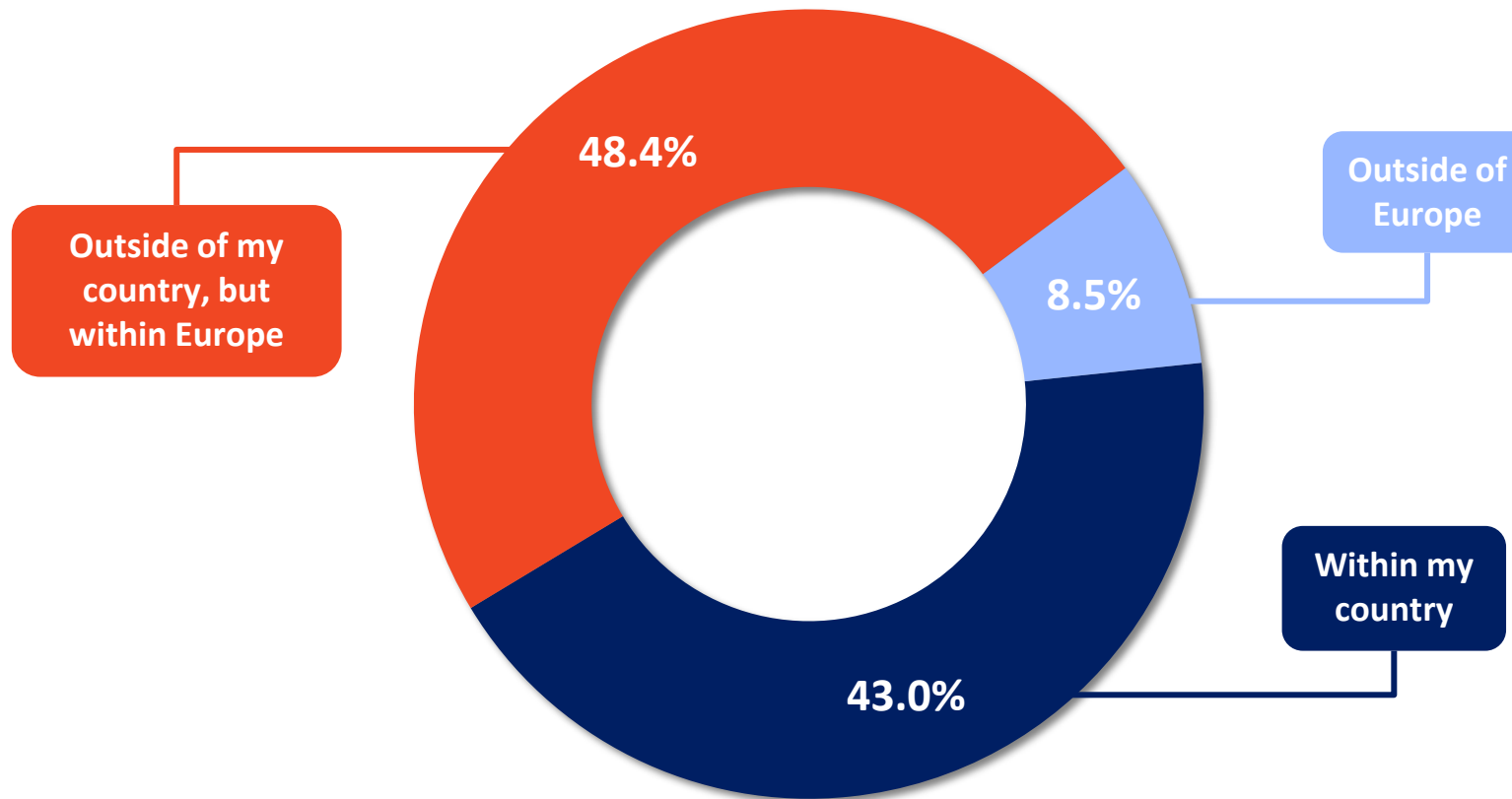
In addition to incentive travel, UK/Ireland respondents are more likely to earn lunch with a CEO or chairman, while Eastern Europeans are less likely to receive the same reward.

Cash-based bonuses are slightly less common in the UK/Ireland but remain prevalent across all regions.

▶ Travel Award Destinations

Most recent incentive travel experiences remain within Europe.

Geographic Distribution of Recent Incentive Travel



Over 91% of respondents traveled within Europe for their incentive travel experiences.

Within Europe, travel awards are split relatively closely between domestic and international destinations.

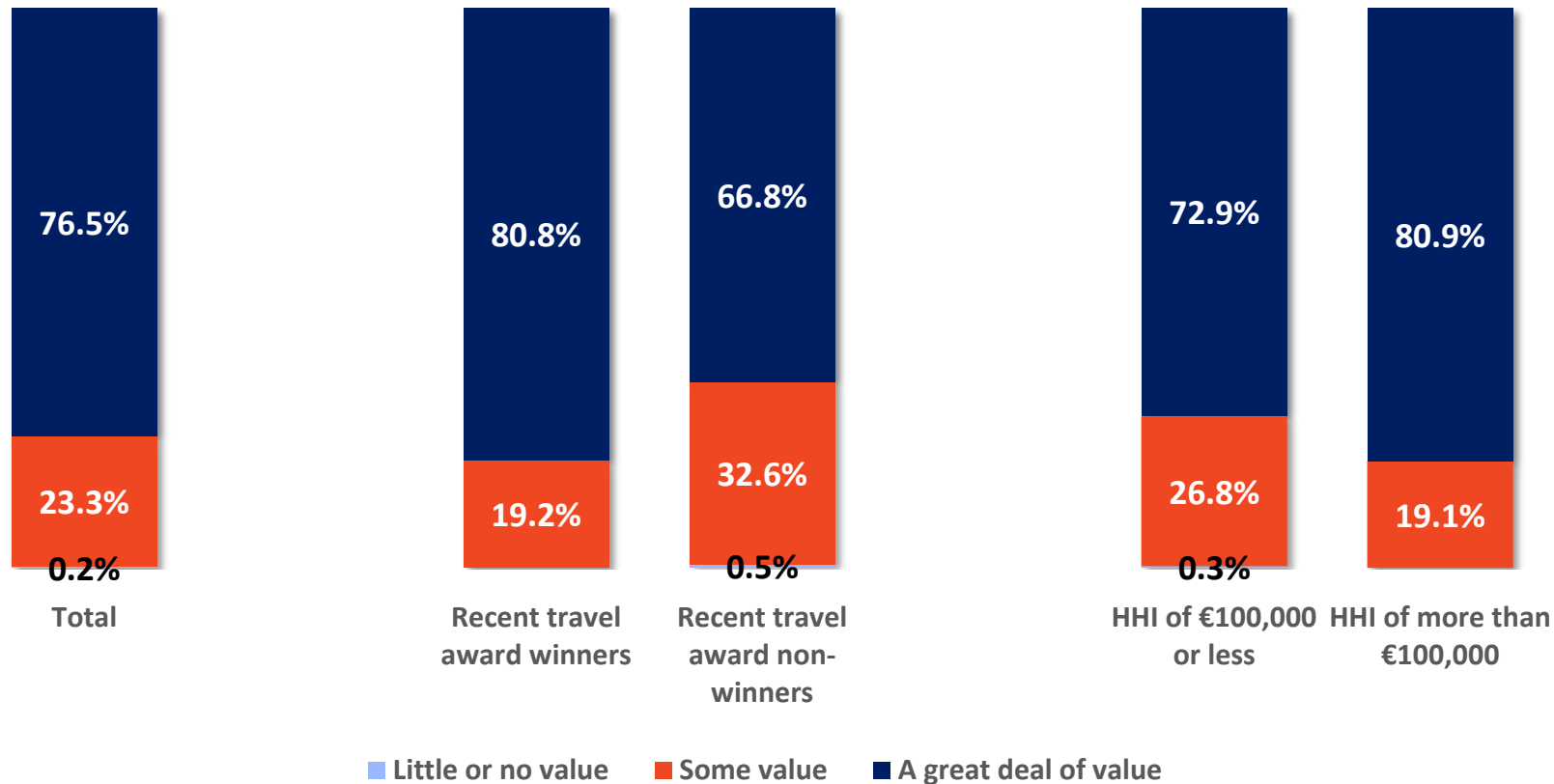


Incentive Travel Feature Preferences and Motivation

▶ Incentive Travel Award Value

Incentive travel to appealing destinations is highly valued.

Incentive Travel Award Value



Nearly all program participants find at least some value in incentive travel rewards.

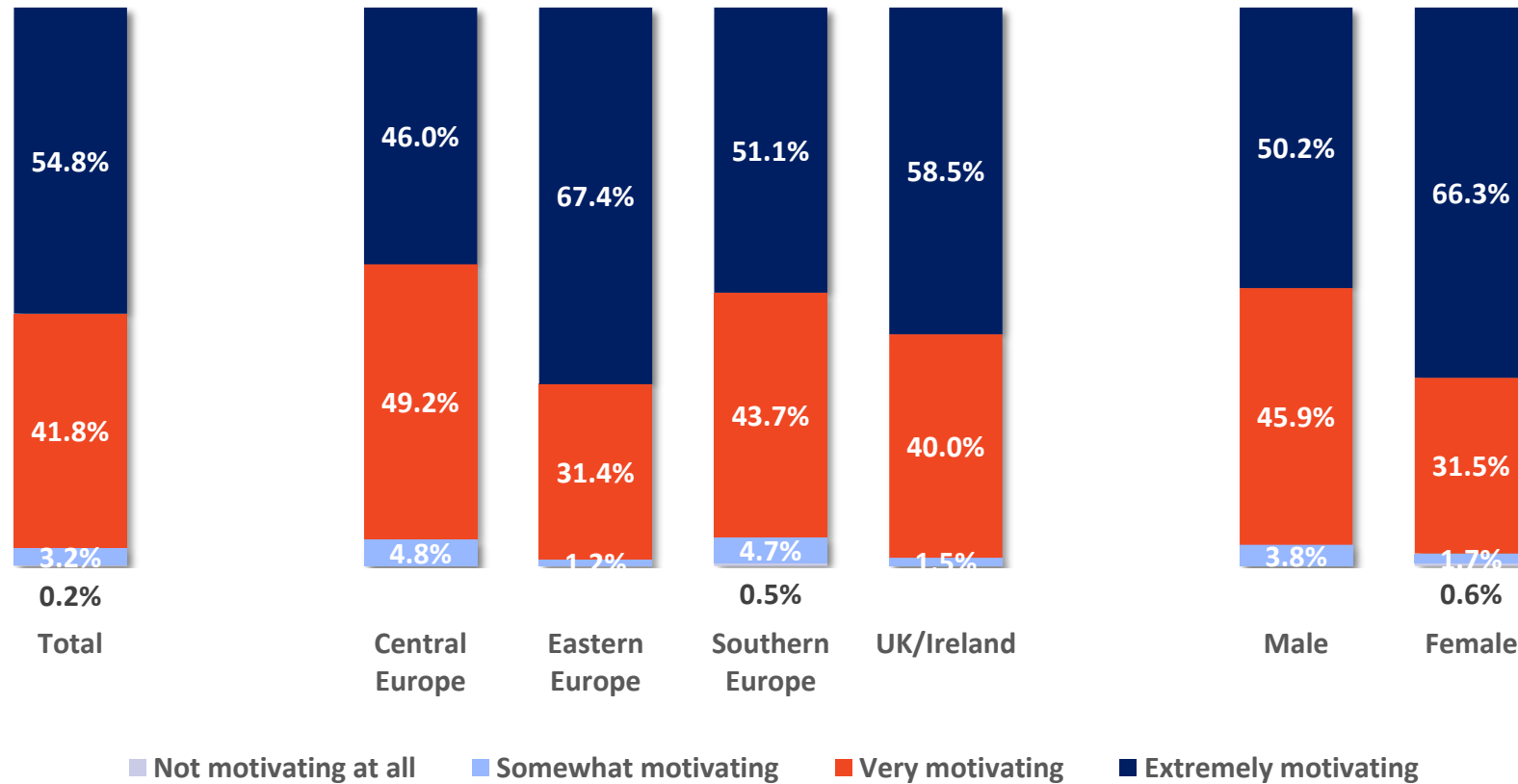
Recent winners are more 14% likely to find a great deal of value in travel awards than non-winners.

Higher earners place a higher value on incentive travel awards than lower earners.

▶ Group Travel Motivation

Group travel experiences are highly motivating.

Group Travel Reward Motivation



Nearly 97% of incentive reward program participants find group travel reward experiences “very” or “extremely motivating”.

Eastern Europeans are more likely to find motivation in group travel, while Central Europeans are less likely to share the same enthusiasm.

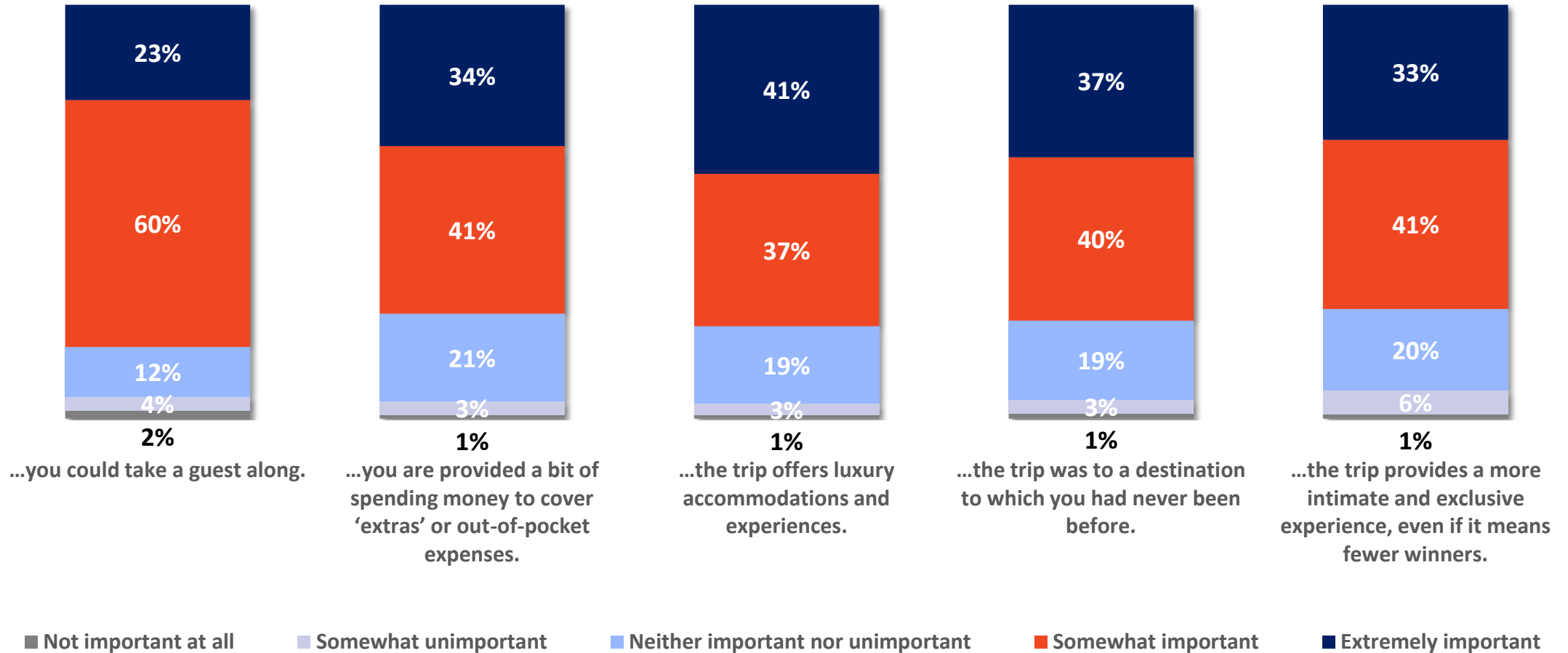
Women are 16% more likely than men to find group travel “extremely motivating”.



Q2: 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?

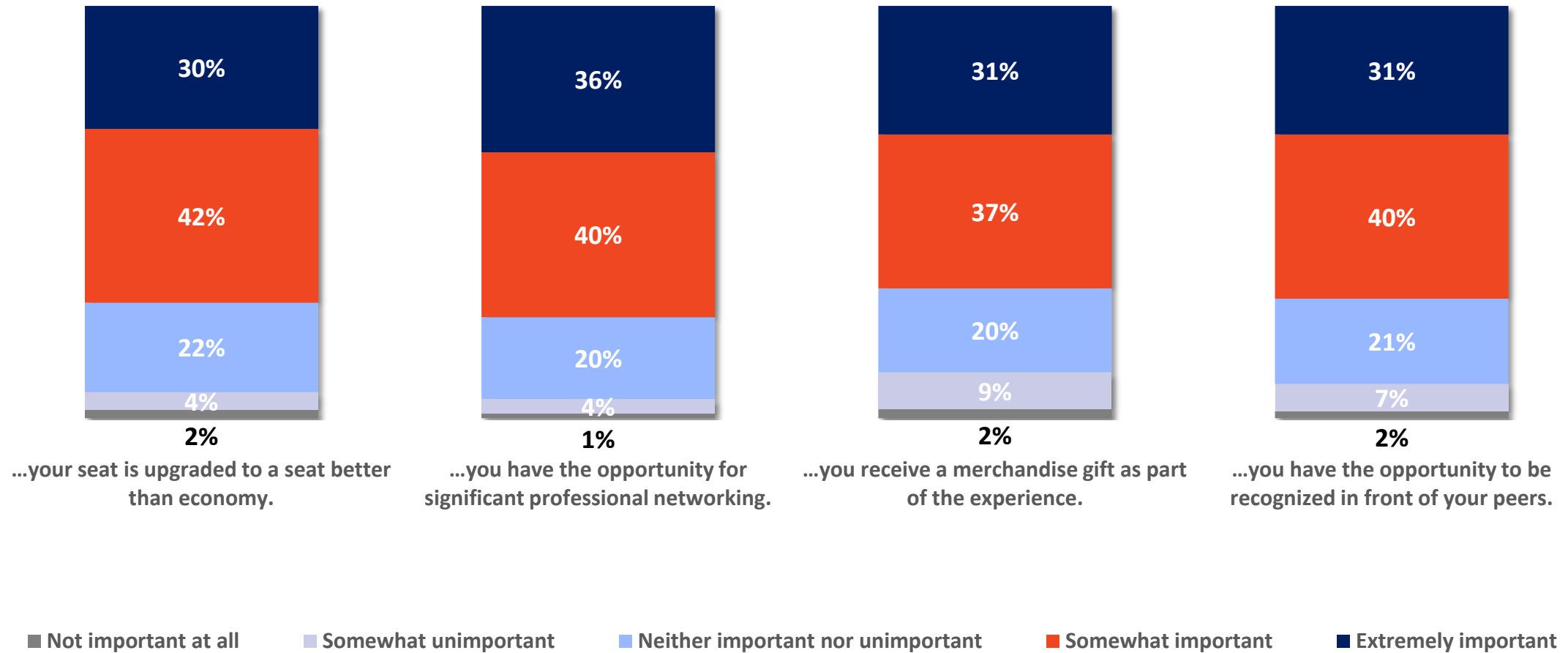
► Important Features of an Incentive Travel Experience

Travel Reward Feature Importance



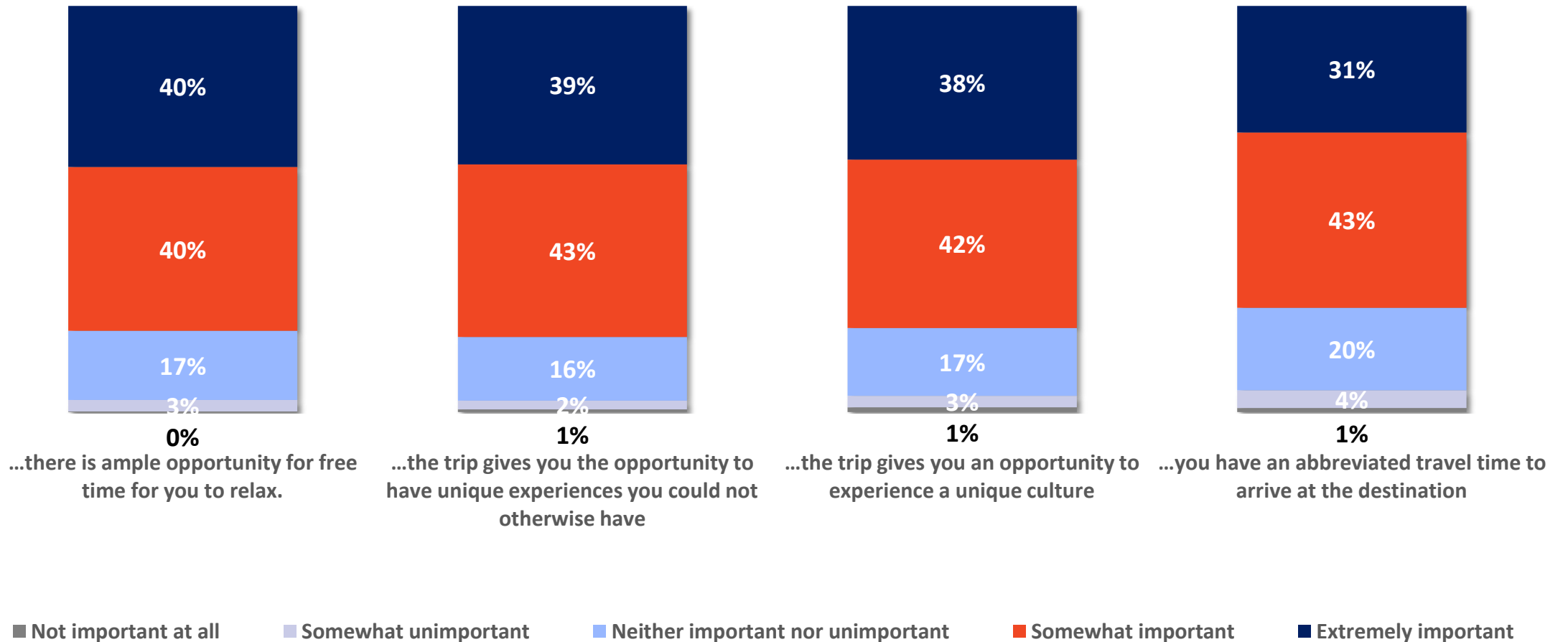
► Important Features of an Incentive Travel Experience

Travel Reward Feature Importance



► Important Features of an Incentive Travel Experience

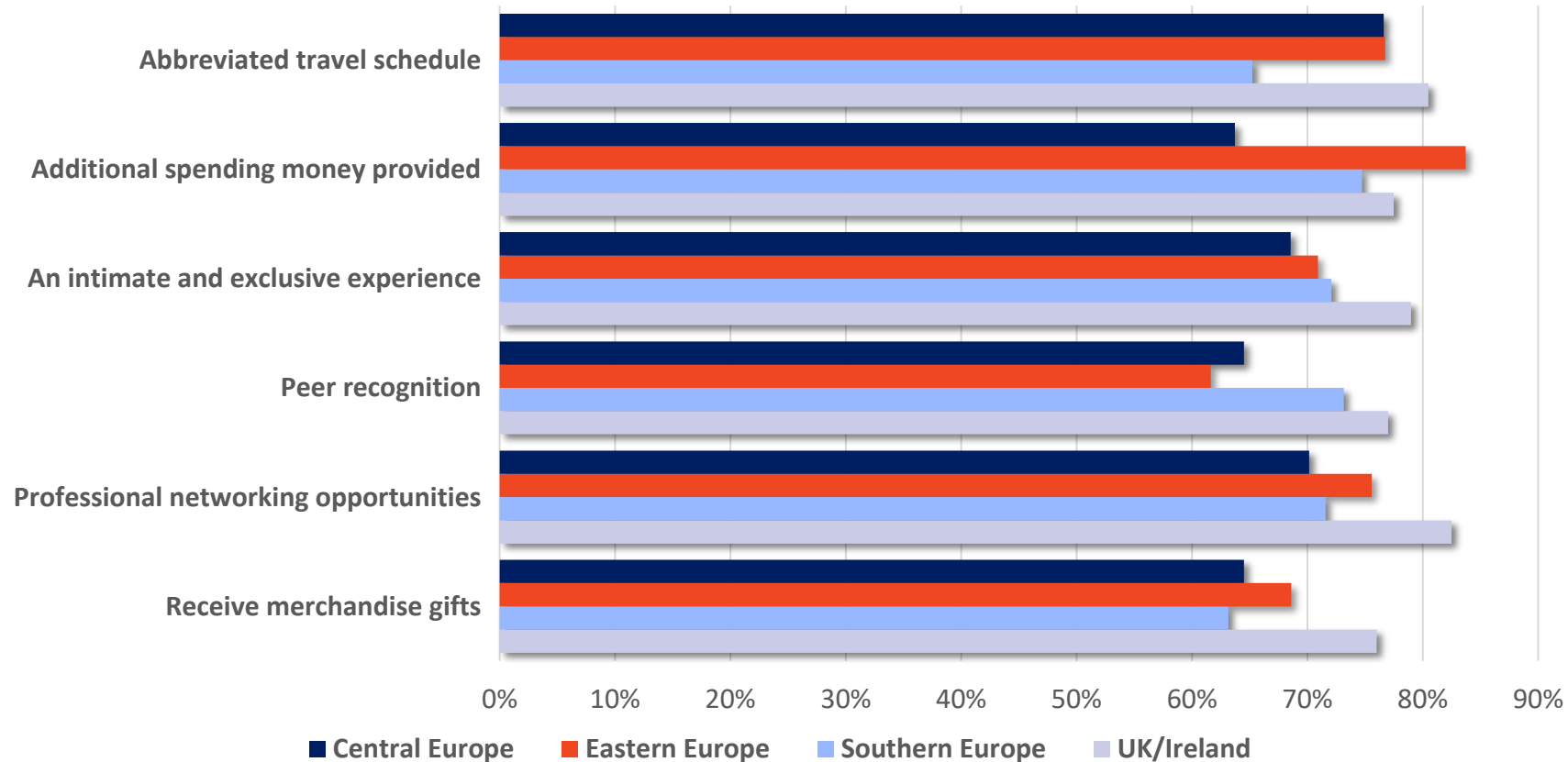
Travel Reward Feature Importance



► Important Features of an Incentive Travel Experience

Incentive travel rewards are most valued for a variety of features.

Travel Reward Feature Overall Importance



Eastern Europeans are particularly drawn to receiving additional spending money.

UK/Ireland respondents place greater value on intimate and exclusive experiences, professional networking opportunities, and merchandise gifts.

An abbreviated travel schedule is highly valued by respondents from the UK/Ireland and Central Europe.

Peer recognition is particularly important to Southern Europeans and UK/Ireland respondents.



Q4: If you were awarded an incentive award trip, how important would it be to you that...?
Overall importance = Somewhat important + Extremely important

▶ Key Factors Making Incentive Travel Highly Desirable

Incentive travel rewards are most desirable when providing luxury accommodations and all-inclusive experiences.

Preferred Features of Reward Travel – Top 3 Ranking



The top three most important factors for a desirable incentive trip are all expenses covered (38.5%), 5-star luxury accommodations (37.8%), and appealing destination (34.5%).

Bringing a guest is also a significant factor, with 29.7% ranking it highly.

Health and wellness, community service opportunities, and cultural interactions rank lower in priority, each under 25%.



Q14: 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.

▶ Key Factors Making Incentive Travel Highly Desirable

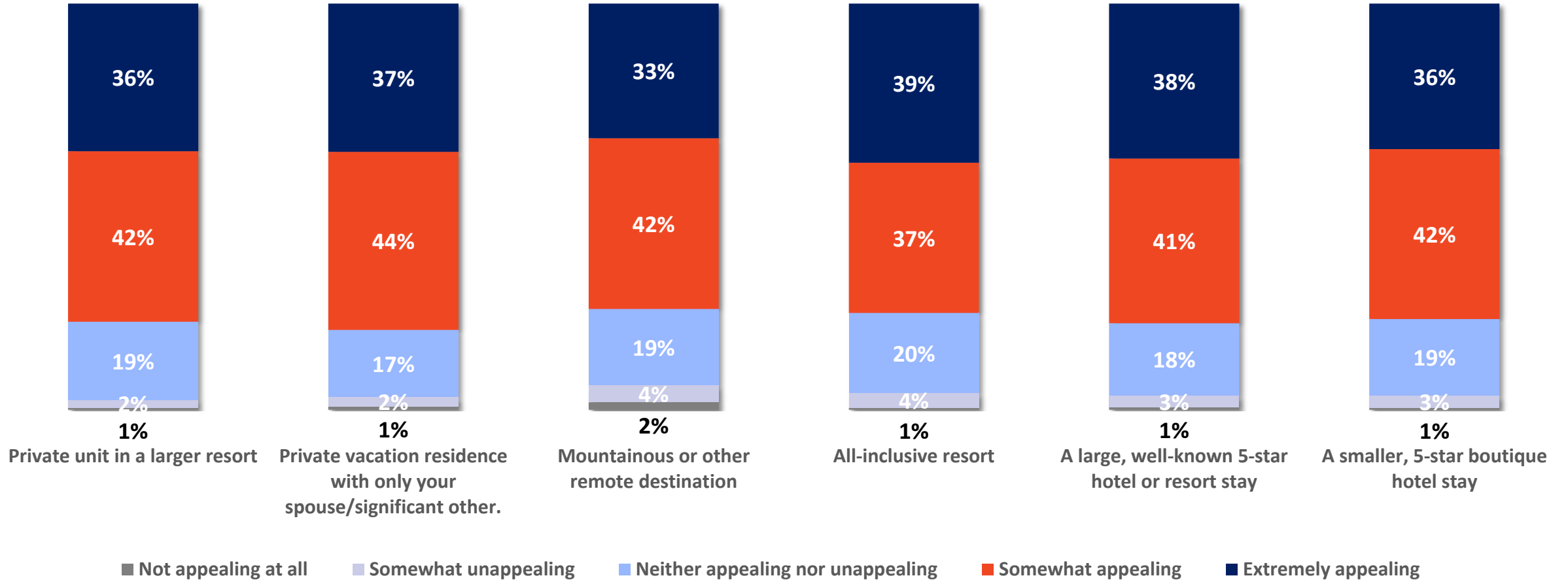
Average rankings confirm desirability of all-inclusive trips with luxury accommodations in appealing destinations.

Preferred Features of Reward Travel - Average Ranking



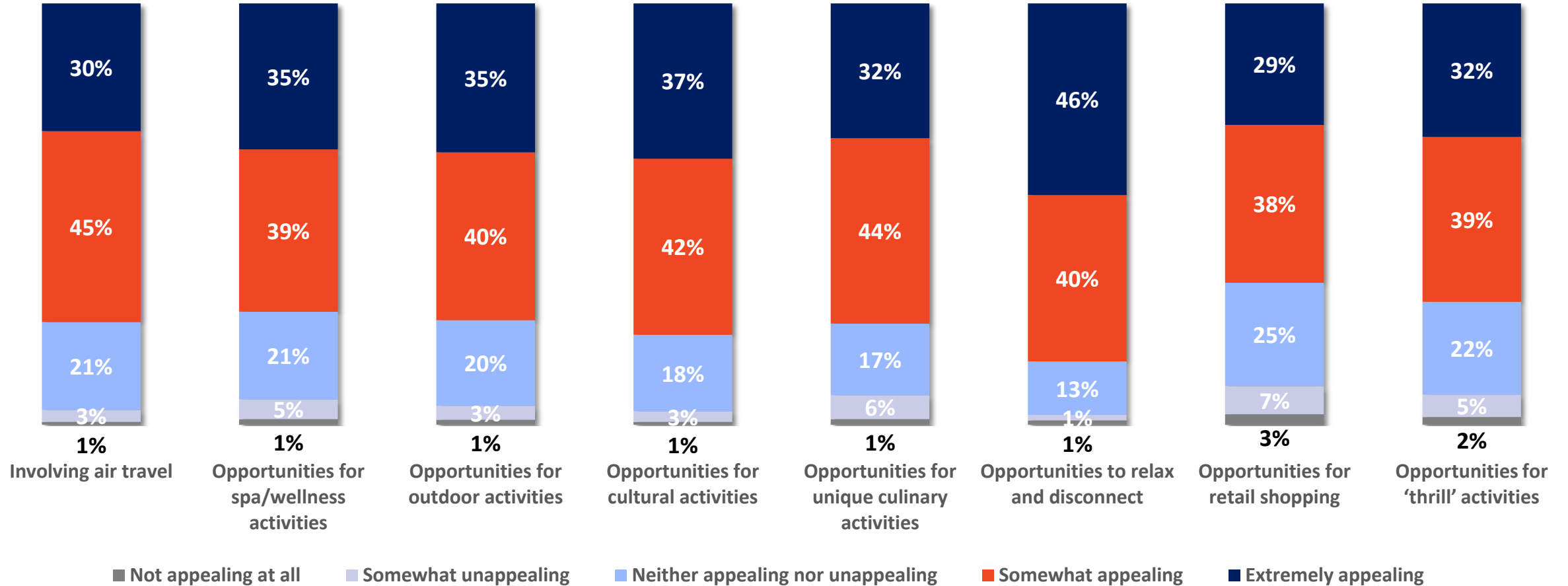
▶ Appealing Features or Activities

Travel Reward Feature Appeal



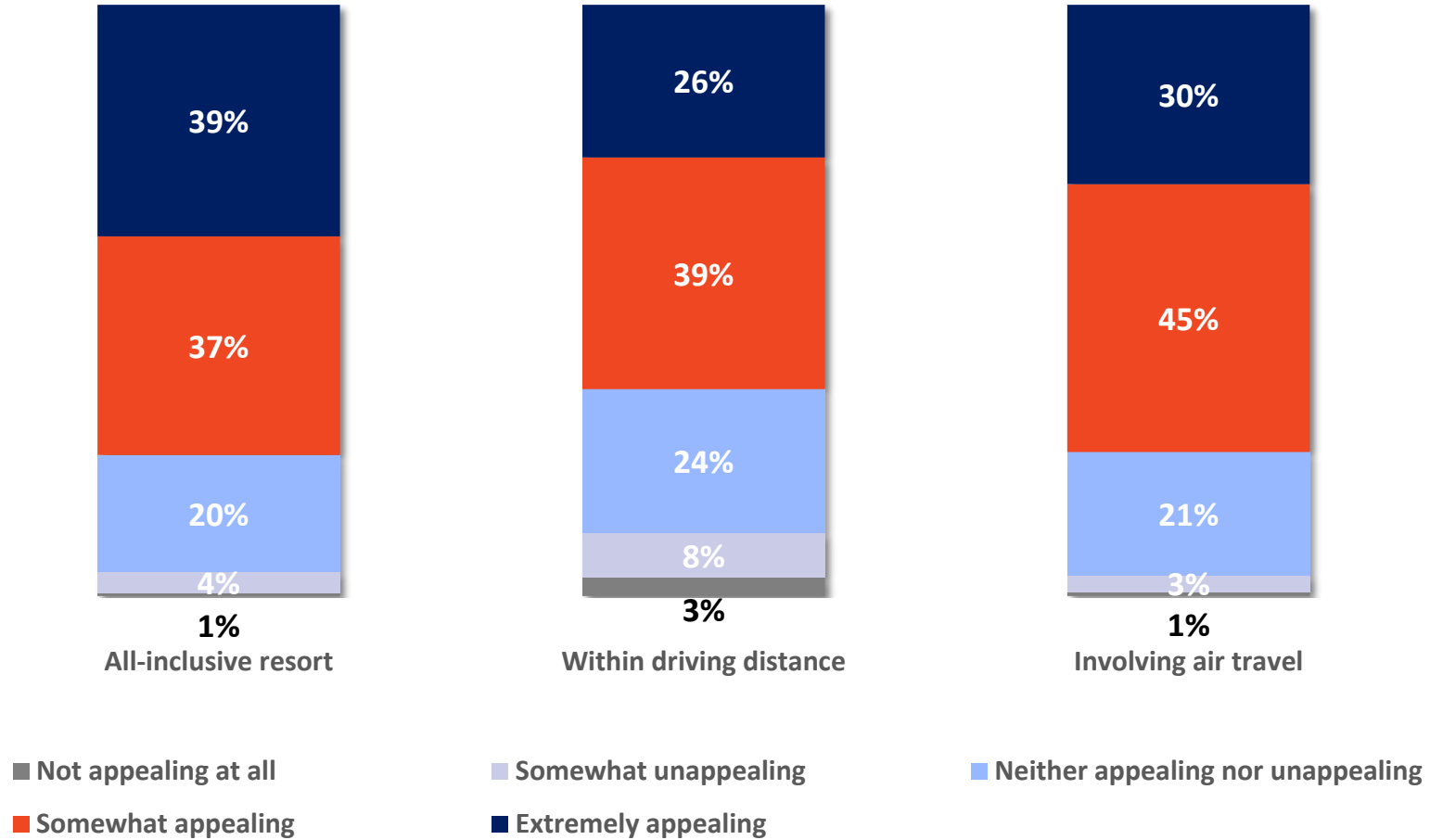
▶ Appealing Features or Activities

Travel Reward Feature Appeal



▶ Appealing Features or Activities

Travel Reward Feature Appeal



▶ Appealing Features or Activities

Appealing features and activities highlight relaxation and a break from the usual routine

Travel Reward Feature Total Appeal

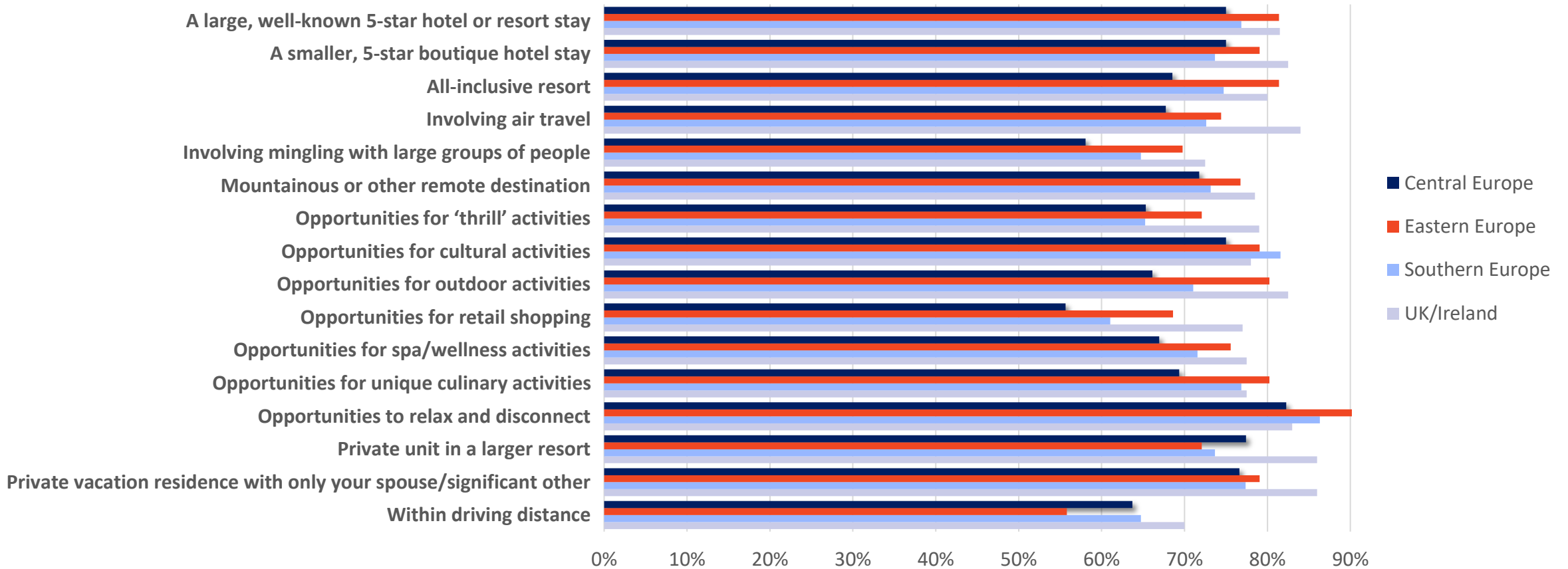


Q10: How appealing or unappealing are each of the following as features or activities associated with an incentive award trip?
Total appeal = Somewhat appealing + Extremely appealing

▶ Appealing Features or Activities

Eastern Europeans and UK/Ireland prefer a wider variety of incentive travel experiences.

Travel Reward Feature Total Appeal by Region

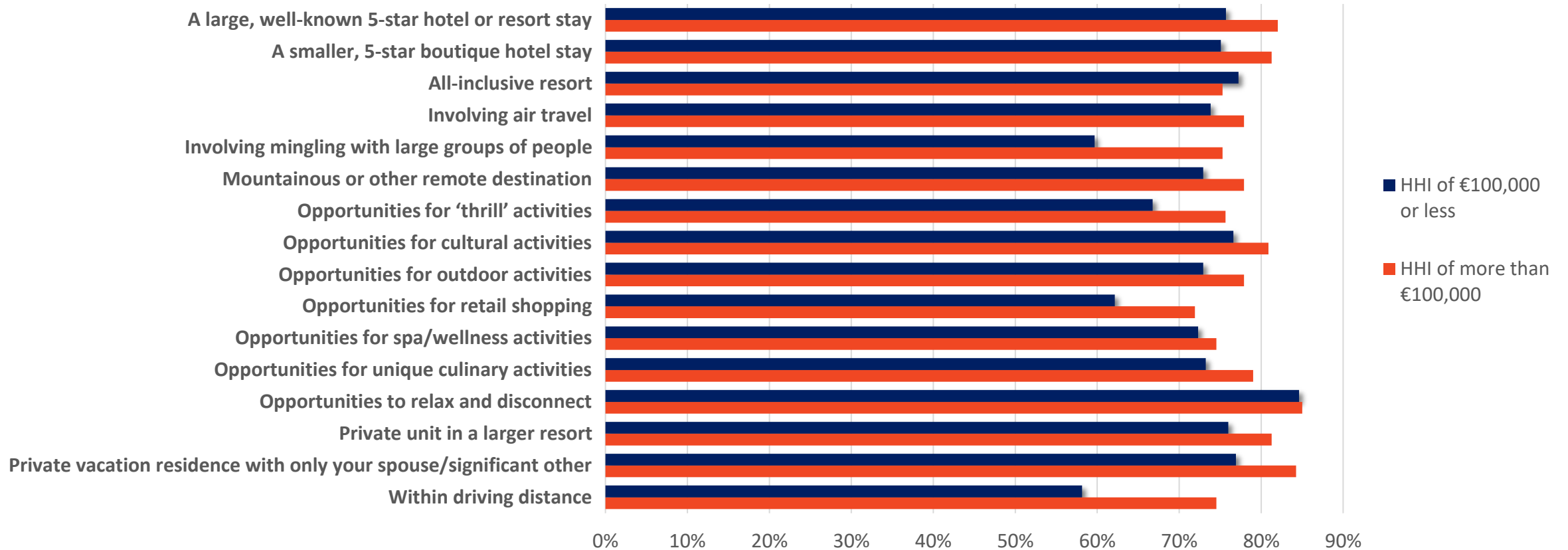


Q10: How appealing or unappealing are each of the following as features or activities associated with an incentive award trip?
Total appeal = Somewhat appealing + Extremely appealing

▶ Appealing Features or Activities

Higher-income respondents find greater appeal in a variety of incentive travel features, while lower-income respondents prefer opportunities for relaxation.

Travel Reward Feature Total Appeal by Region

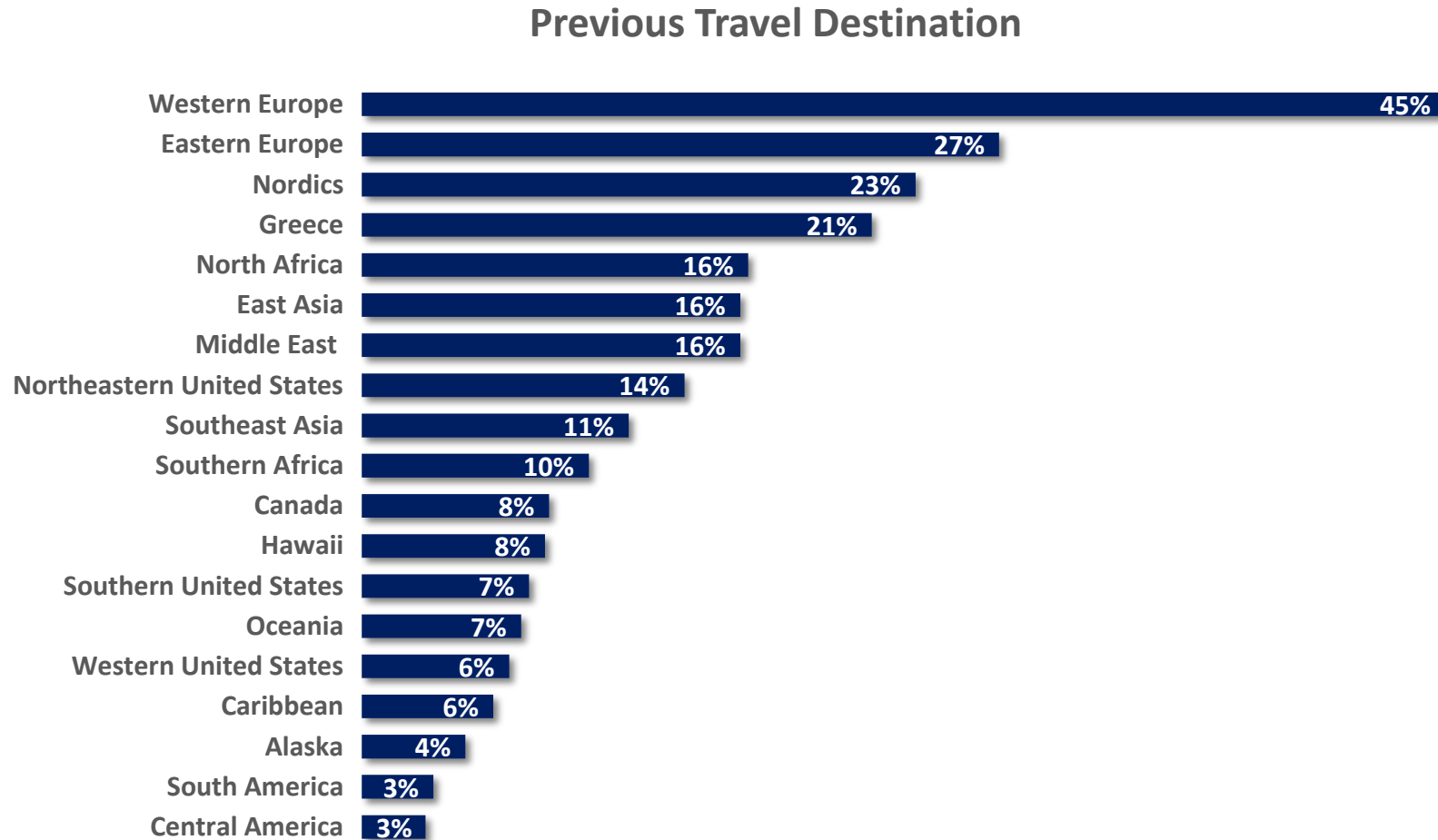




Destination Experiences

► Past Visits to Incentive Travel Destinations

Respondents are most familiar with European travel destinations.



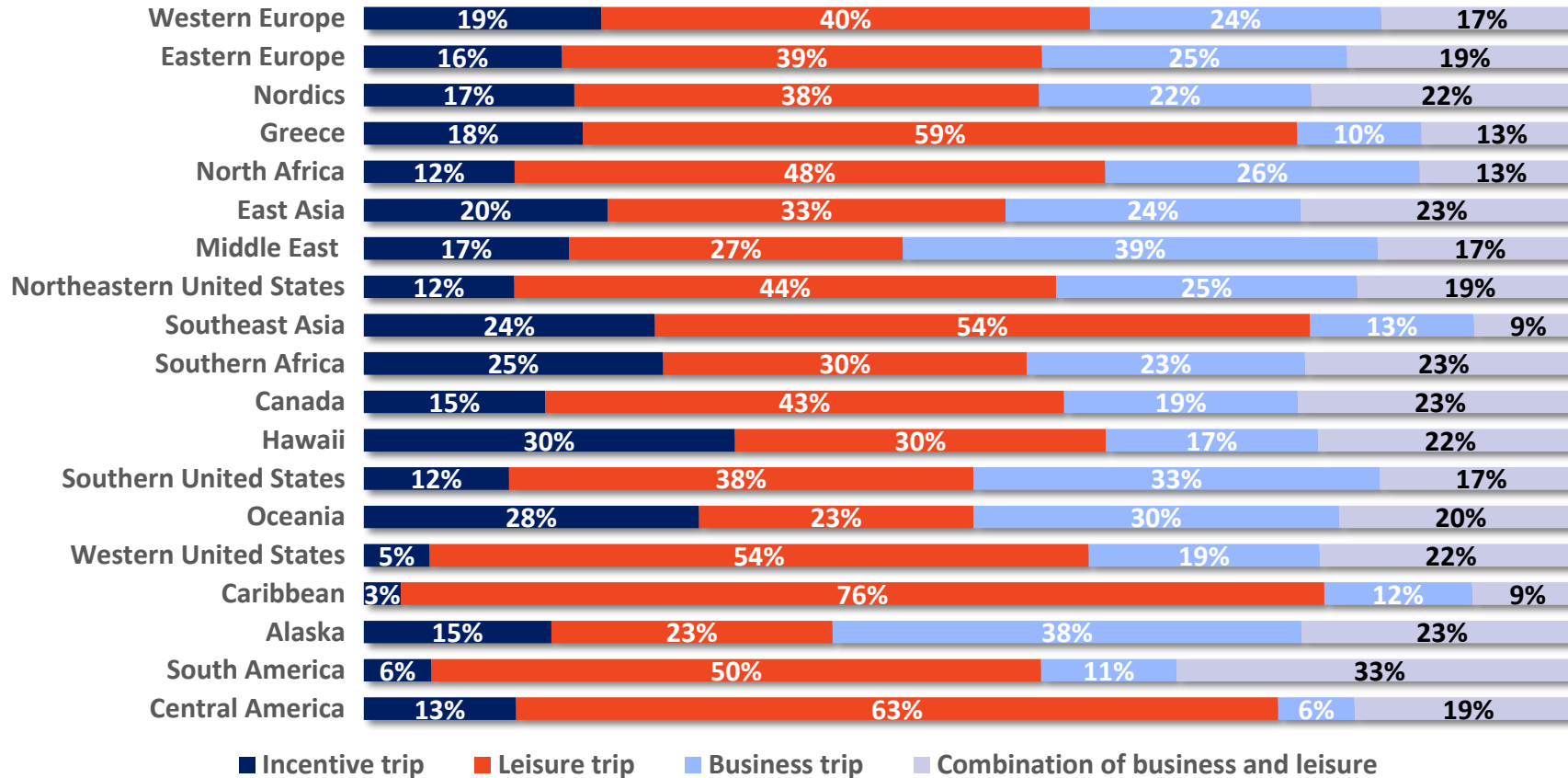
71% of respondents have visited a European region, with Western Europe being the most popular destination.

70% of respondents have traveled outside of Europe, with North Africa, East Asia, and the Middle East being the most frequently visited regions.

► Past Visits to Incentive Travel Destinations

Though influences vary, leisure or business travel most commonly drive trip destinations.

Reason for Travel Destination



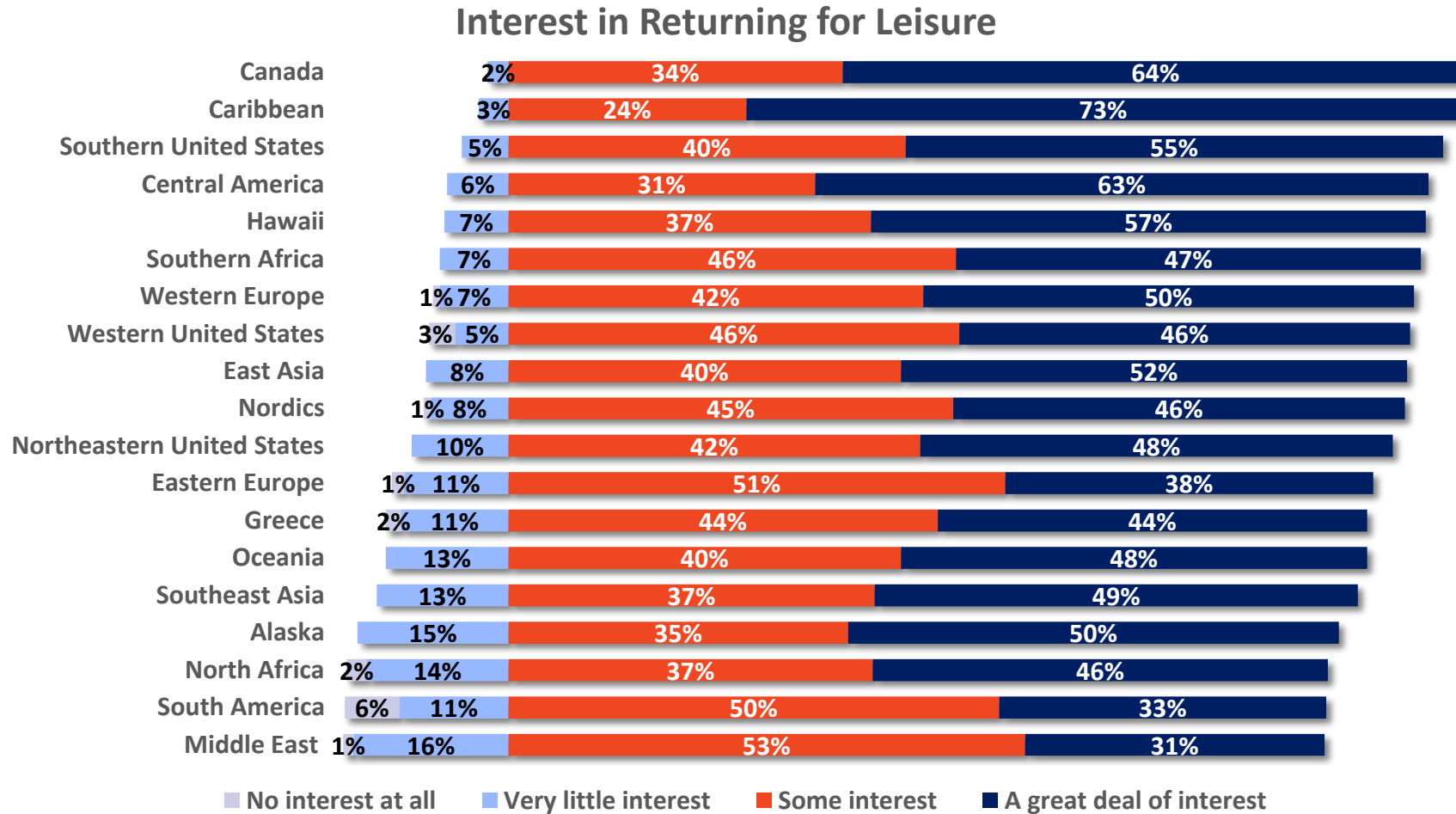
The Caribbean (76%), Central America (63%), and Greece (59%) have the highest likelihood of leisure travel.

The Middle East (39%), Alaska (38%), and the Southern United States (33%) have the highest prevalence of business travel.

Hawaii (30%), Oceania (28%), and Southern Africa (25%) see the highest proportion of incentive reward travelers.

► Interest in Revisiting Destinations for Leisure

Most respondents express strong interest in returning to destinations for leisure.



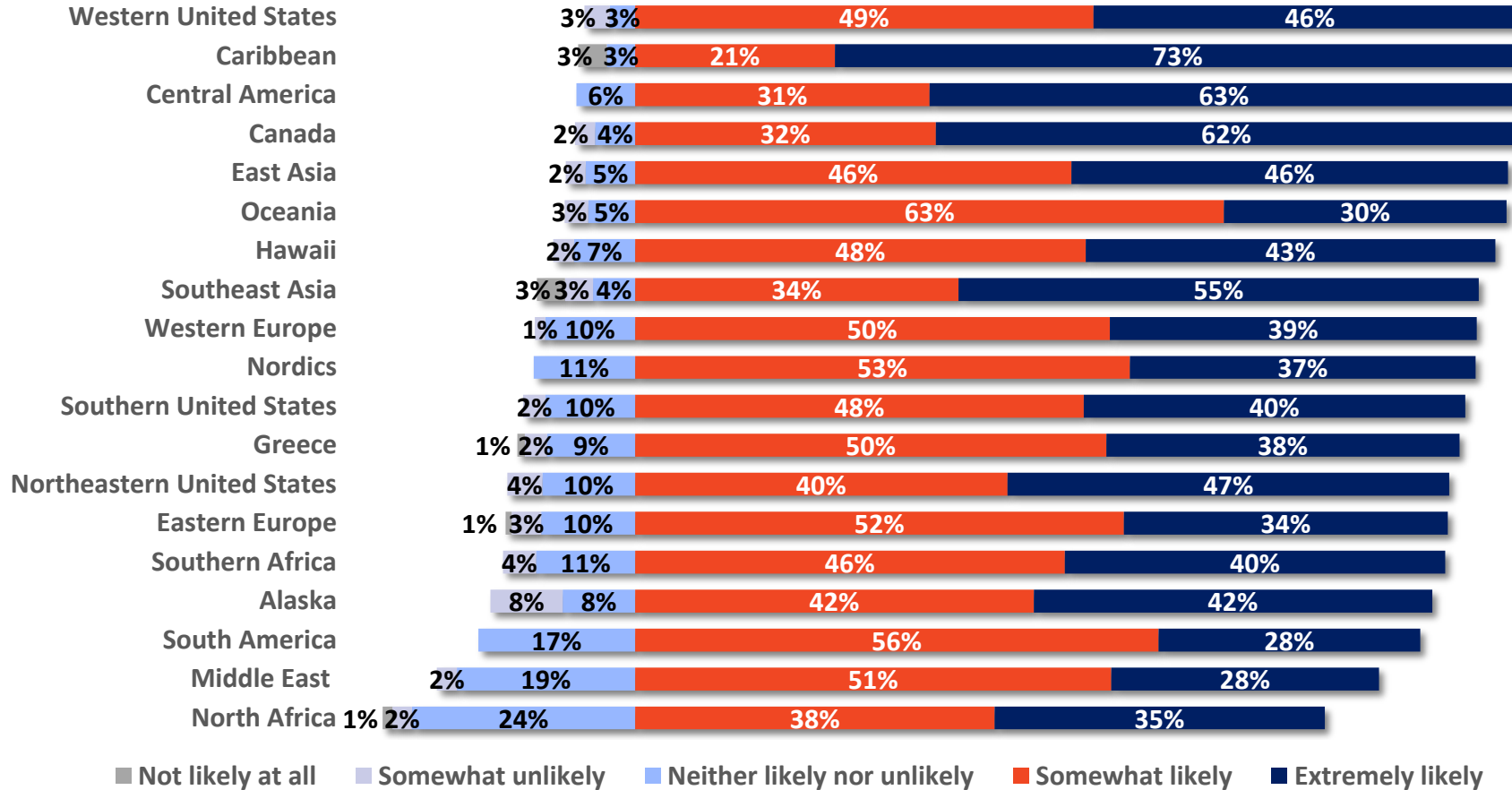
Canada, the Caribbean, and the Southern United States show the highest levels of interest for return visits, with 98%, 97%, and 95% of respondents expressing at least 'some interest'.

South America (6%) and the Western United States (3%) have the highest percentages of respondents who report 'no interest at all' in returning for leisure.

▶ Incentive Travel Award Destination Recommendations

Intercontinental destinations are most likely to be recommended for future incentive travel awards.

Travel Award Destination Likelihood



The Western United States, the Caribbean, Central America, and Canada are the most highly recommended destinations for incentive travel, followed closely by East Asia and Oceania.

Notably, 73% of past travelers are extremely likely to recommend the Caribbean as an incentive travel award destination, 10% higher than any other location.



Q25: Based on your experiences traveling to [country/region], how likely would you be to recommend [country/region] as an incentive travel award destination?

► Destination Experiences Summary

Destination	Incidence of Previous Visits	Interest in Returning for Leisure	Likelihood to Recommend for Incentive Travel Reward
Alaska	Low	Medium	Medium
Canada	Low	High	High
Caribbean	Low	High	High
Central America	Low	High	High
East Asia	Medium	High	High
Eastern Europe	High	Medium	Medium
Greece	High	Medium	High
Hawaii	Low	High	High
Middle East	Medium	Medium	Medium
Nordics	High	High	High
North Africa	Medium	Medium	Low
Northeastern United States	Medium	High	Medium
Oceania	Low	Medium	High
South America	Low	Medium	Medium
Southeast Asia	Medium	Medium	High
Southern Africa	Medium	High	Medium
Southern United States	Low	High	High
Western Europe	High	High	High
Western United States	Low	High	High

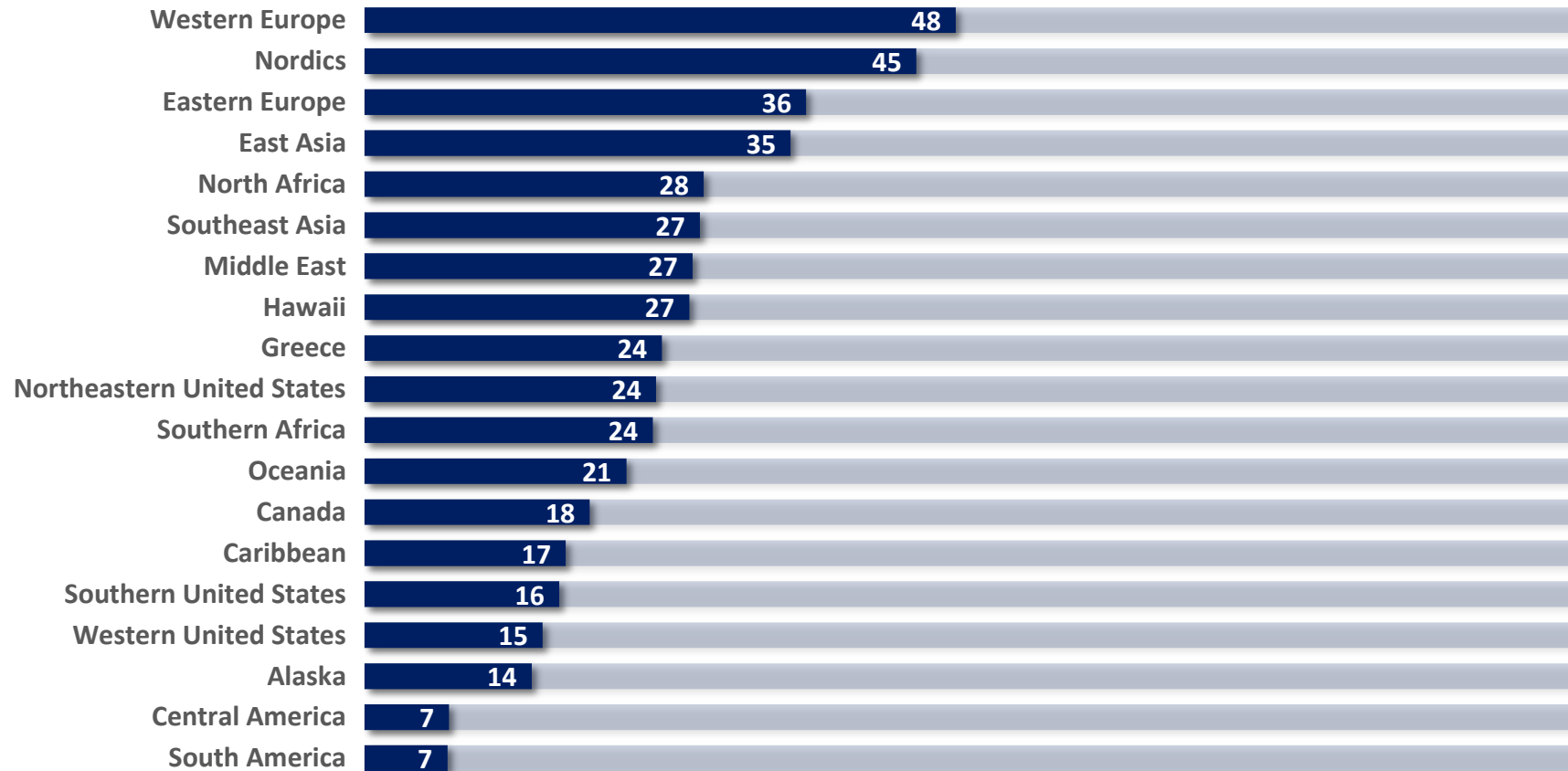


Destination Preferences

► Motivating Destinations

European and Asian destinations are the top motivators in incentive travel programs

Travel Destination Motivation Index



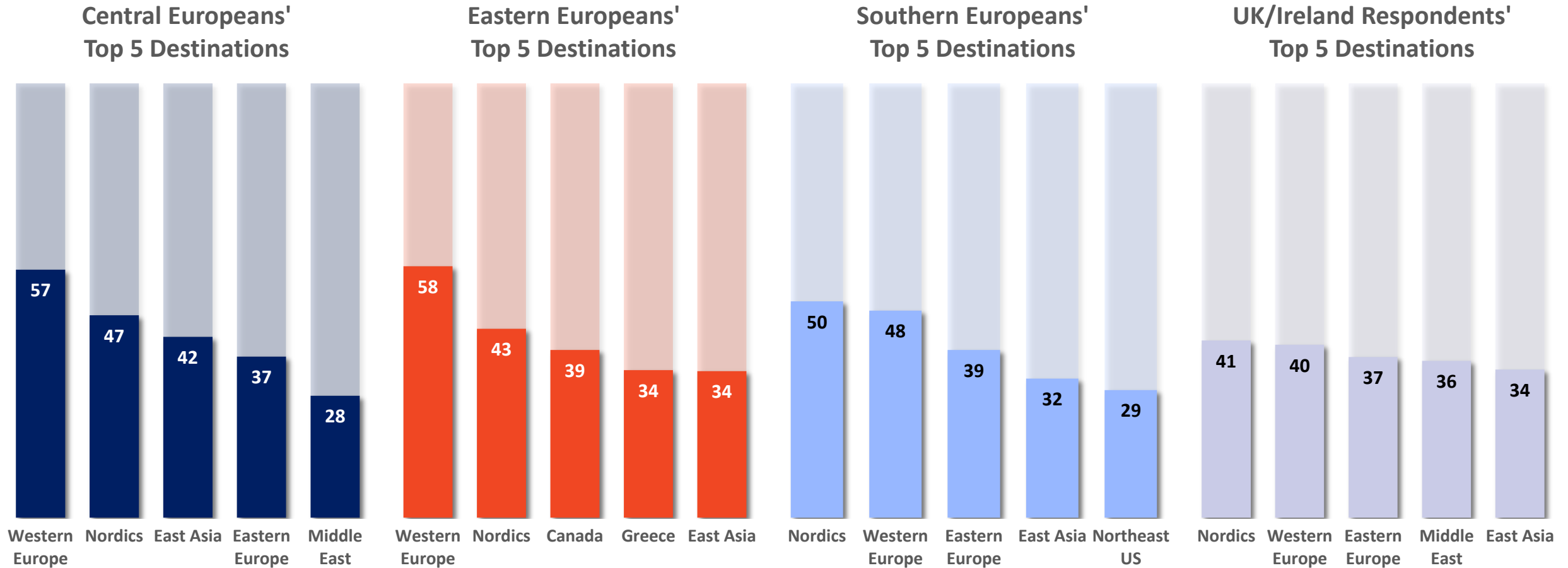
Western Europe, the Nordics, and Eastern Europe stand out as highly motivating travel destinations, showcasing a strong preference for regional travel within Europe.

East Asia and Southeast Asia also drive higher motivation, highlighting the appeal of culturally unique destinations.

Preferences for North Africa, the Middle East, and Hawaii also indicate opportunities for diversity in destinations, expanding the range of motivating options.

▶ Motivating Destinations

Eastern and Southern Europeans show interest in North American destinations, alongside European and Asian options.

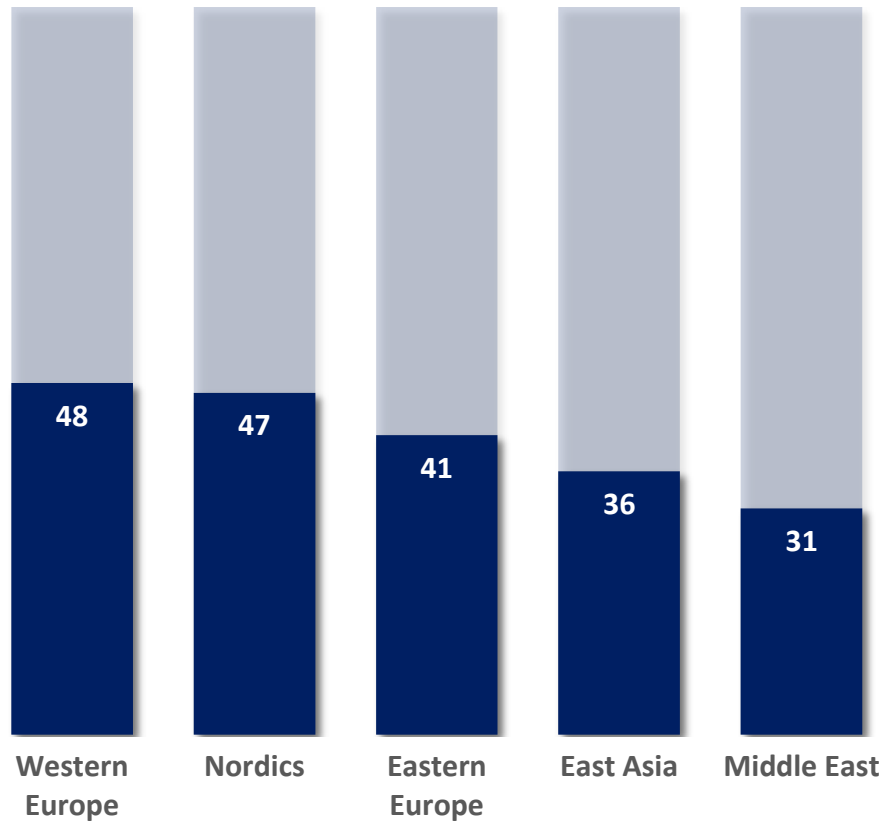


Q15/16: From the following/remaining list, please choose the three/two destinations that would motivate you the most if an incentive award trip were to be offered to these locations.

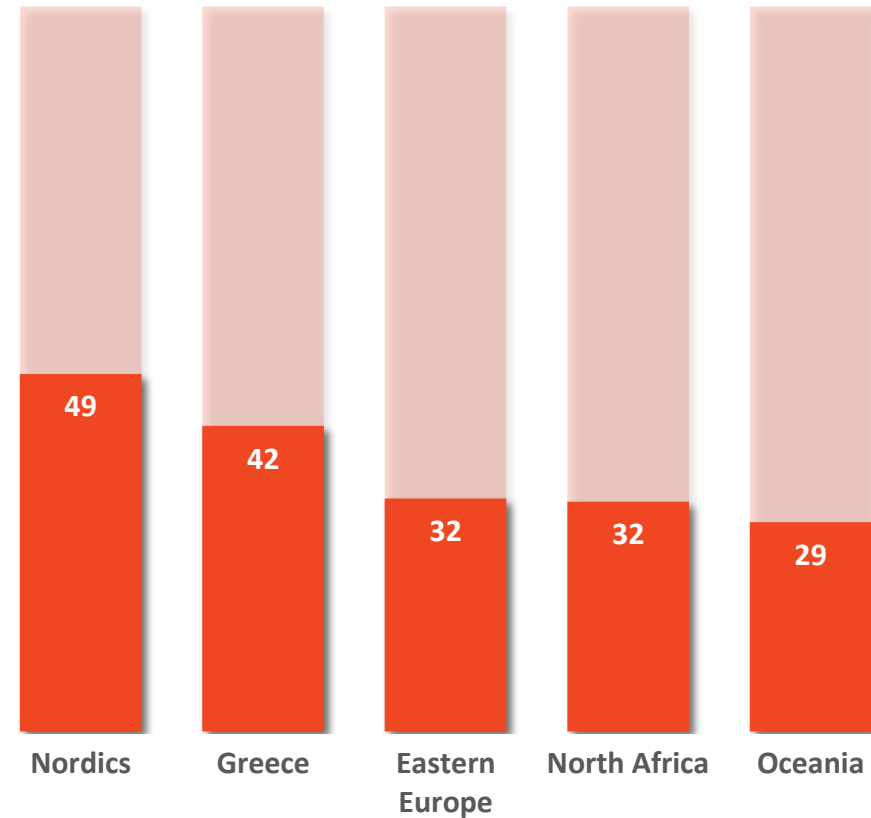
► Motivating Destinations

Women are more motivated by diverse and exotic destinations compared to men.

Male Top 5 Destinations

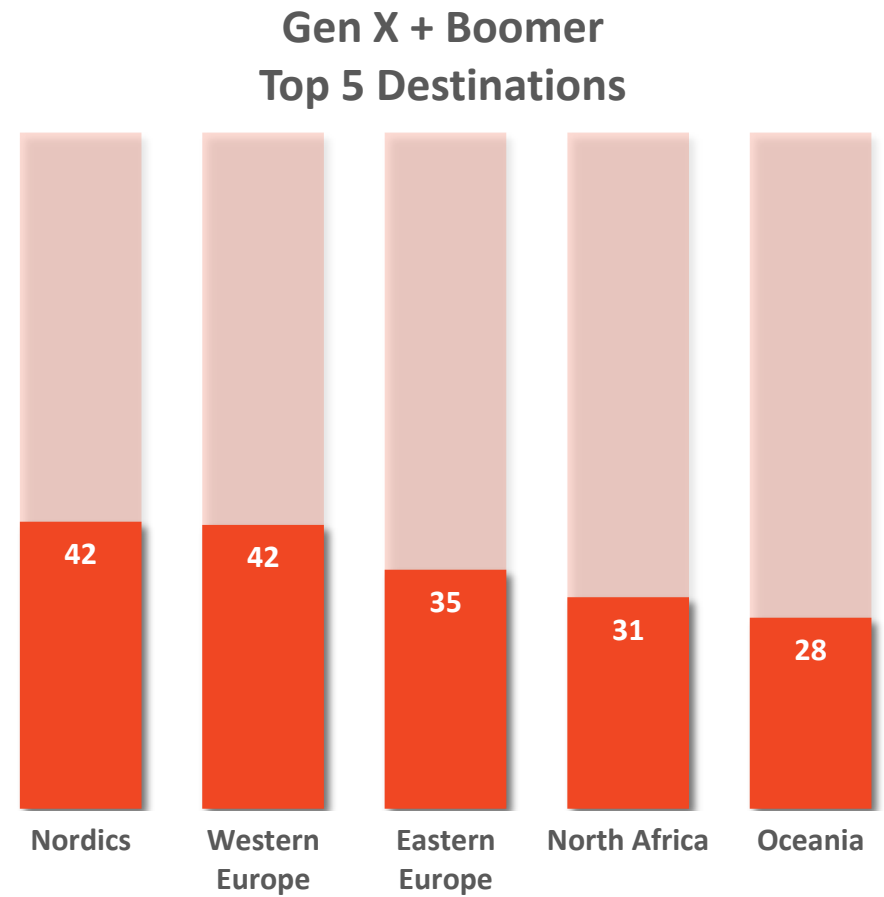
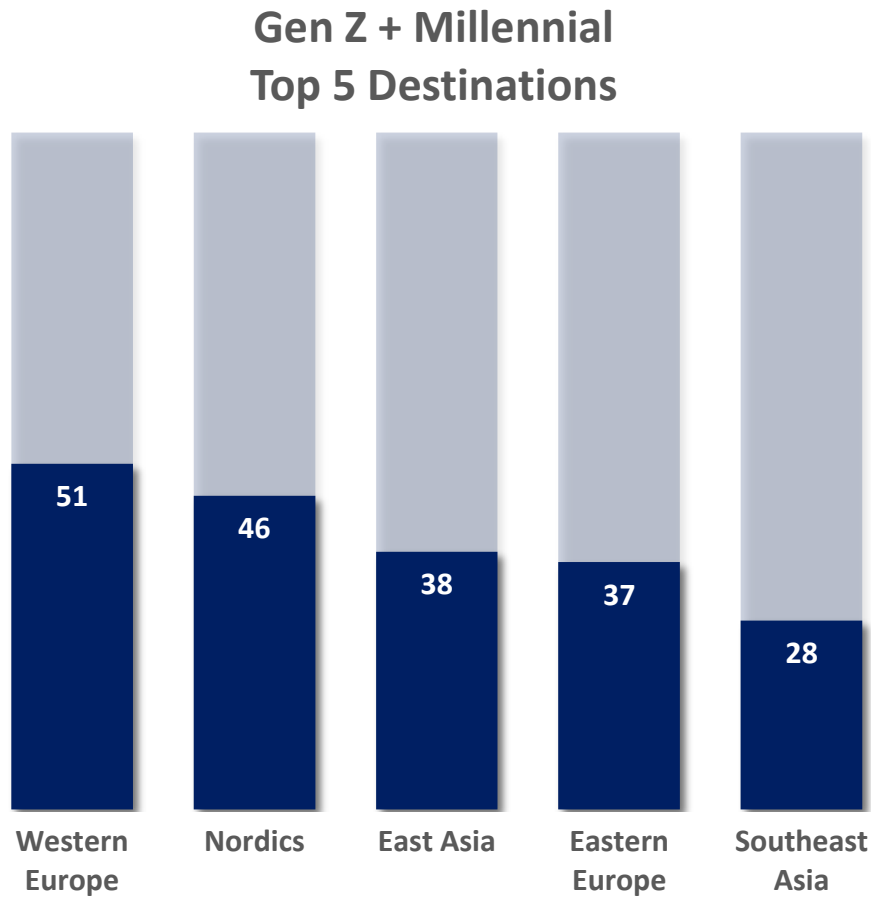


Female Top 5 Destinations



▶ Motivating Destinations

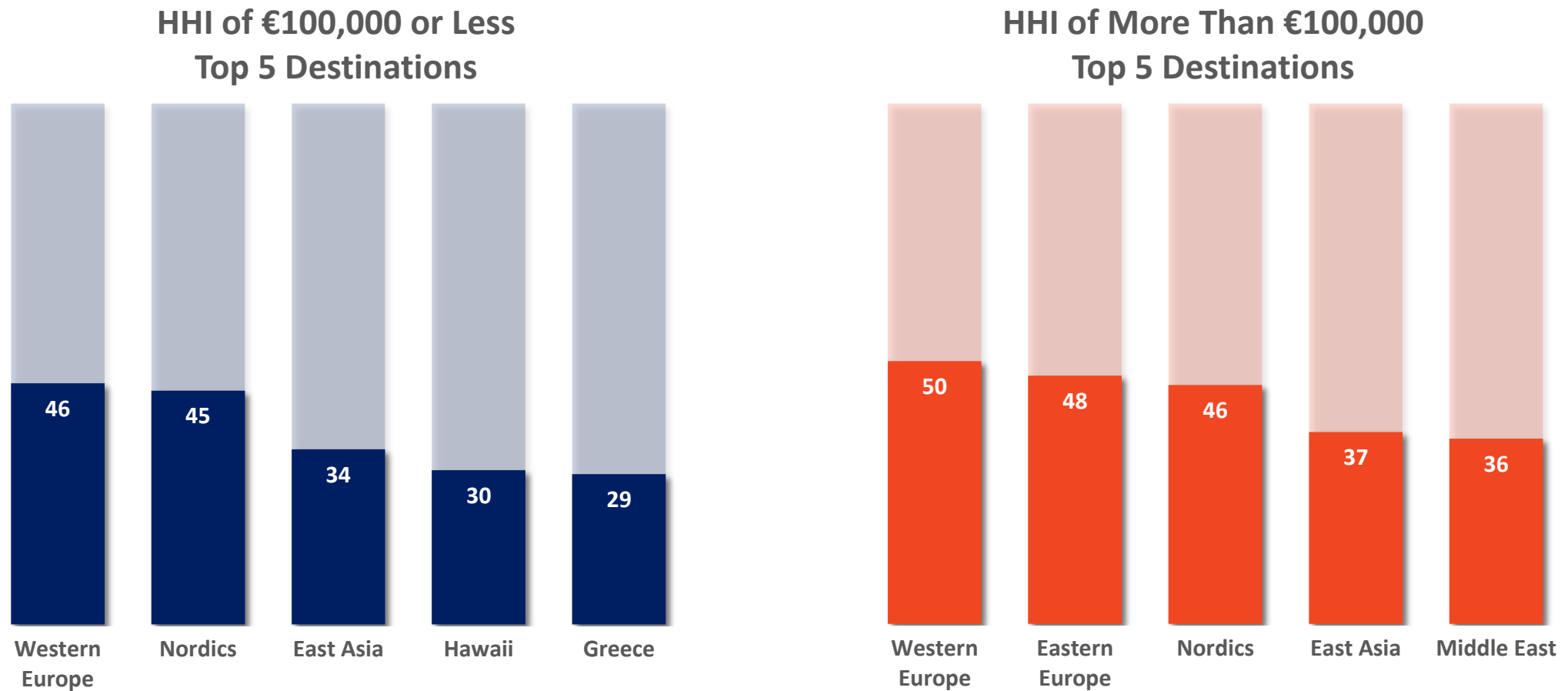
Younger participants prefer European and Asian destinations, while older participants have more diverse motivators.



Q15/16: From the following/remaining list, please choose the three/two destinations that would motivate you the most if an incentive award trip were to be offered to these locations.

► Motivating Destinations

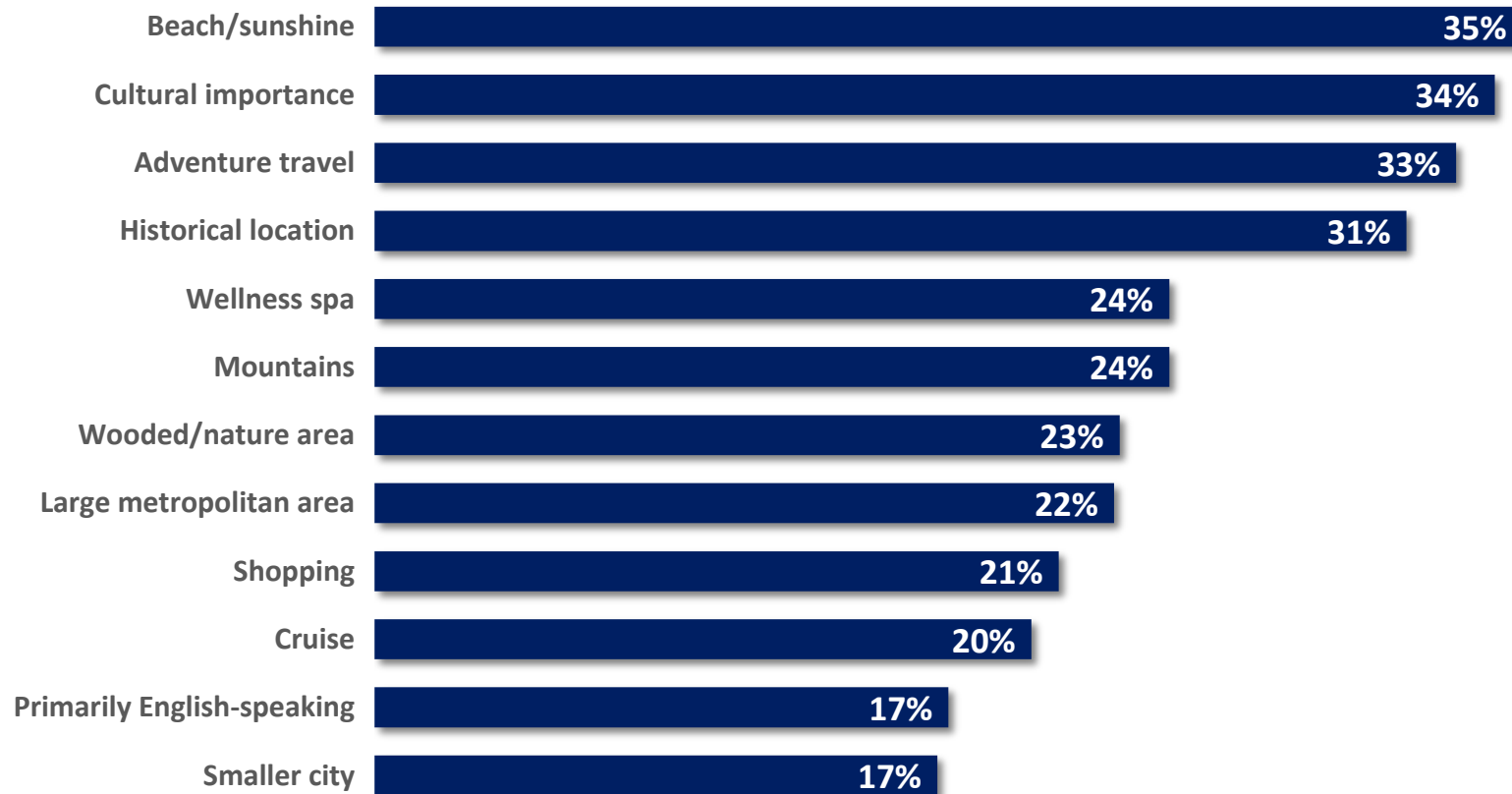
Participants with lower incomes find greater motivation in global destinations than those with higher incomes.



► Preferred Destination Features

Preferred destinations include opportunities for relaxation and adventure, and are rich in heritage.

Preferred Destination Features - Top 3 Ranking



Beach/sunshine and wellness spa are among the most commonly top-selected location features, highlighting a desire for relaxation.

The popularity of adventure travel and mountains suggests a strong interest in destinations offering exploration and outdoor activities.

Cultural importance and historical locations are frequently ranked highly, indicating a preference for destinations rich in heritage and history.

► Preferred Destination Features

While overall importance shifts slightly, average rankings confirm a desire for relaxation, adventure, and cultural and historical experiences.

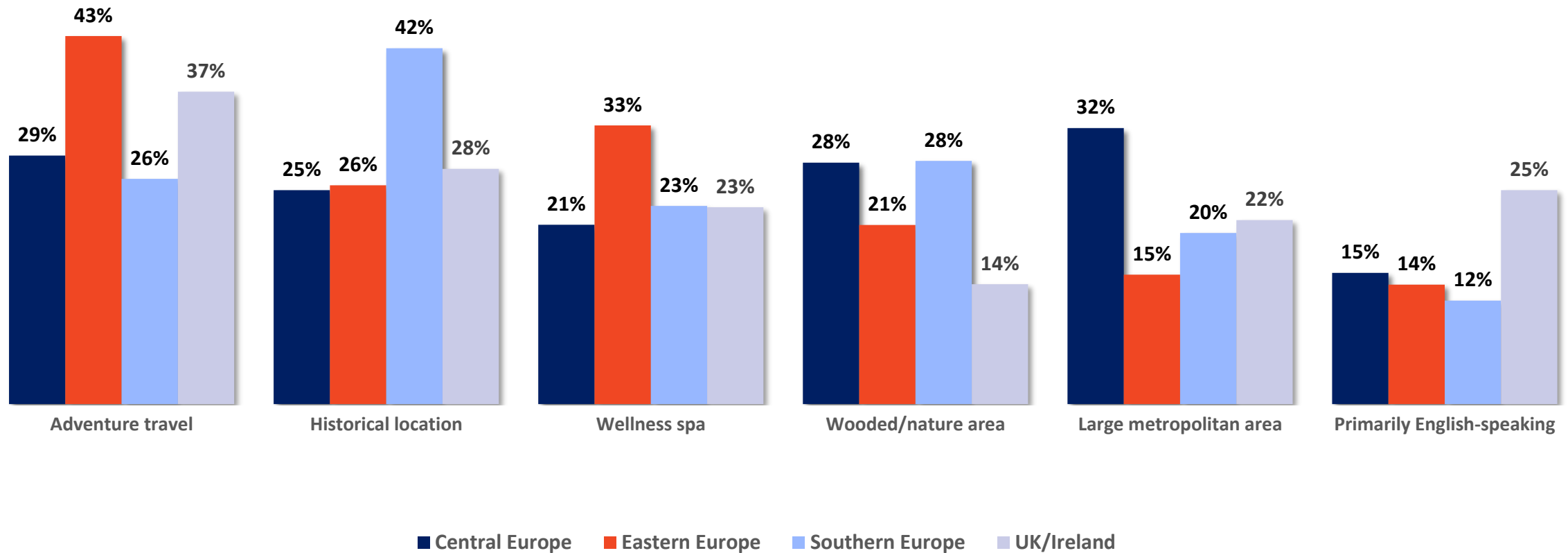
Preferred Features of Reward Travel - Average Ranking



▶ Preferred Destination Features

Central Europeans are likely to prefer metropolitan destinations, while Eastern Europeans favor adventure and wellness, Southern Europeans lean toward historical sites, and UK/Ireland respondents favor English-speaking locations with a touch of adventure.

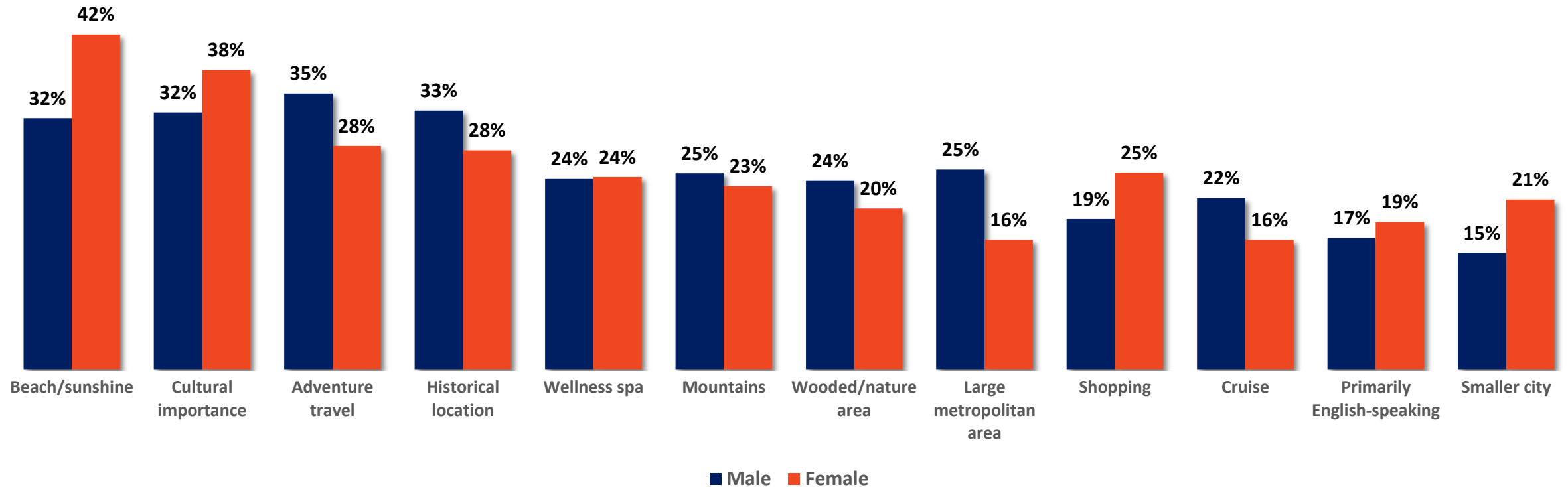
Preferred Destination Features - Top 3 Ranking



► Preferred Destination Features

Women are more drawn to destinations that offer relaxation, shopping, and cultural experiences, while men tend to prefer adventure, historical exploration, and larger cities.

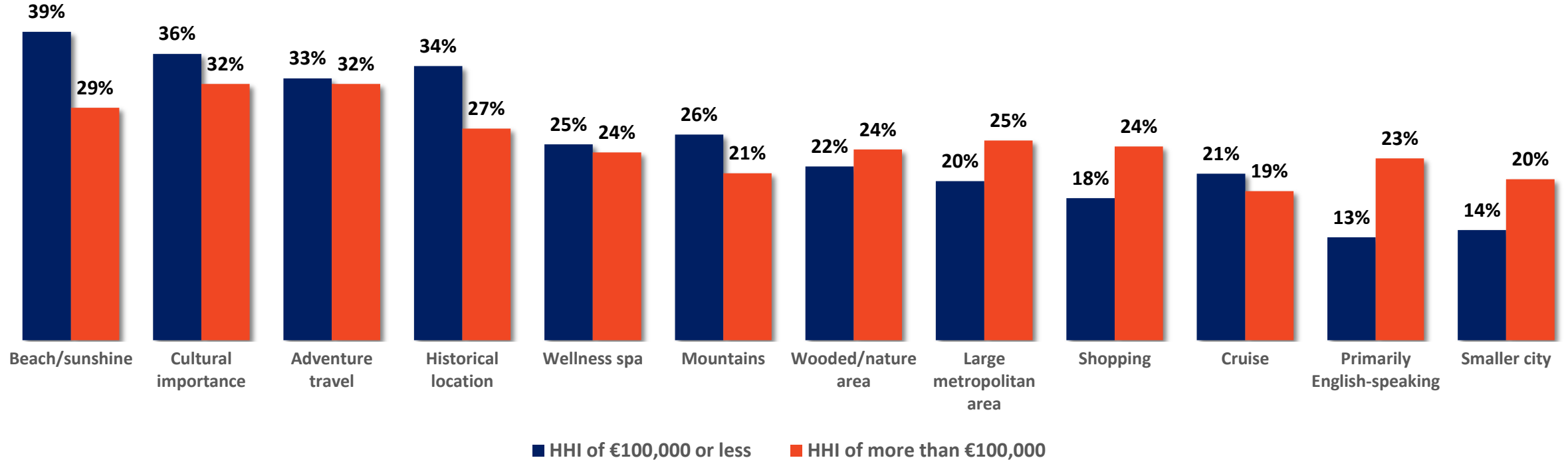
Preferred Destination Features - Top 3 Ranking



► Preferred Destination Features

Higher earners prefer destinations with urban appeal and English-speaking regions, while those with lower incomes are more attracted to relaxation, cultural experiences, and nature-based destinations.

Preferred Destination Features - Top 3 Ranking

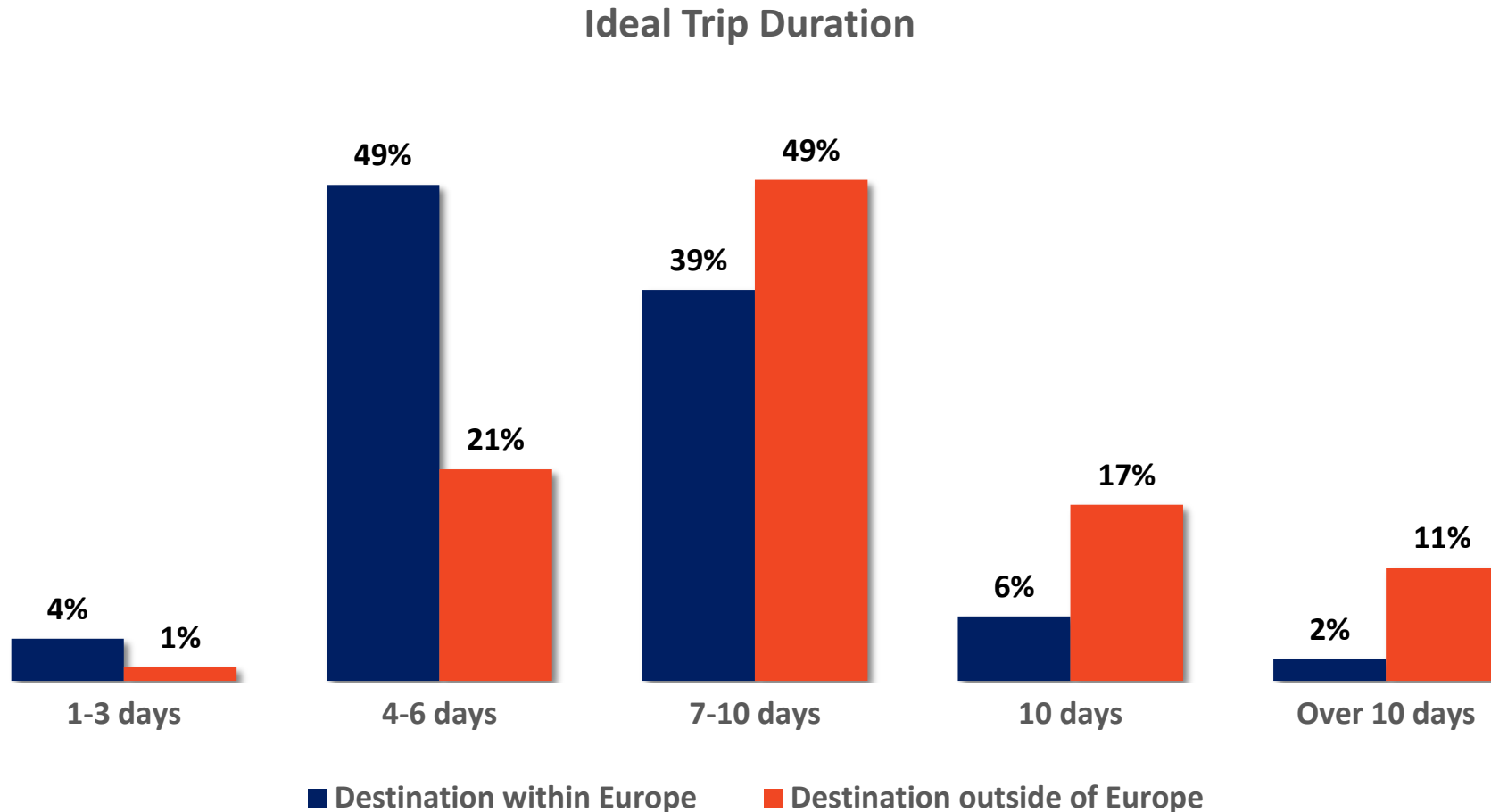




Trip Duration and Travel Preferences

► Ideal Trip Duration

Program participants prefer longer trips when traveling outside of Europe.



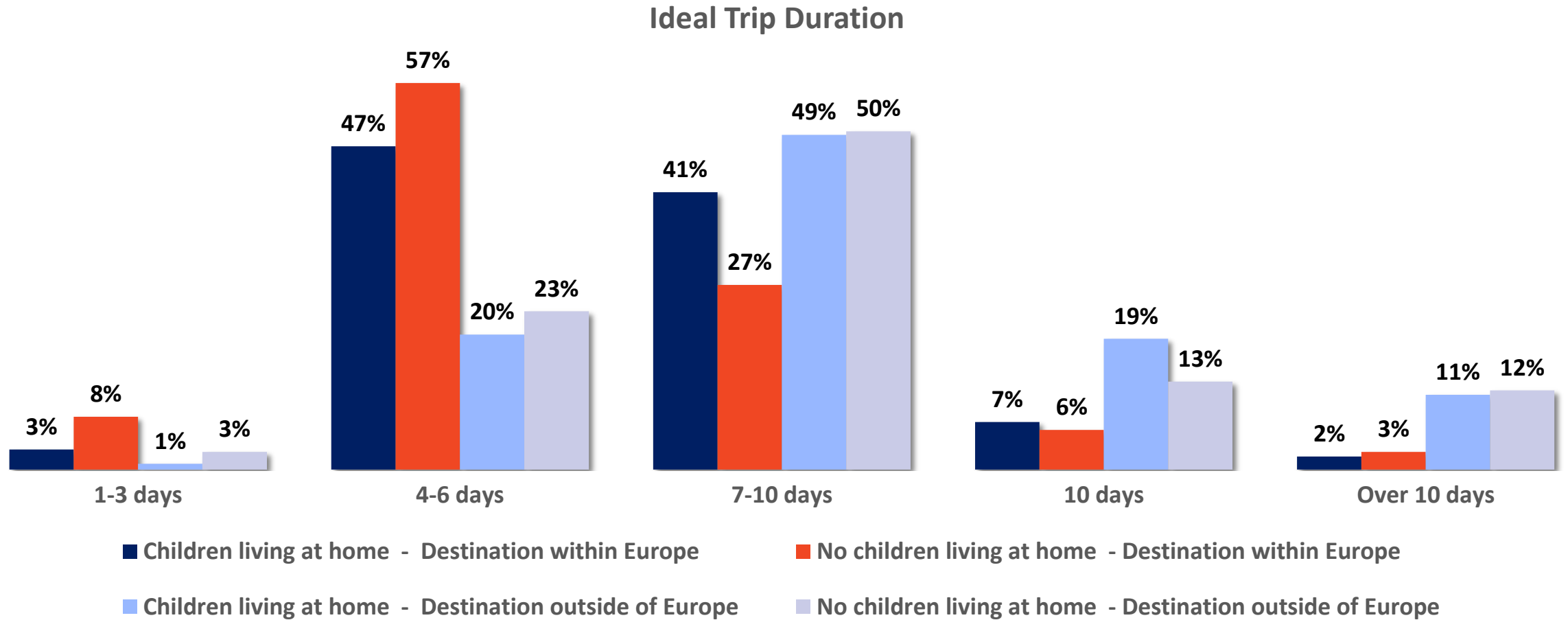
Four to six-day trips are most preferred for incentive travel within Europe, indicating a desire for more compact and easily accessible destinations.

For travel outside Europe, respondents lean towards seven to ten-day trips, suggesting a desire for more immersive and extended experiences.

A notable percentage of participants favor trips ten days or longer when traveling outside Europe, highlighting the appeal of extended vacations for intercontinental destinations.

► Ideal Trip Duration

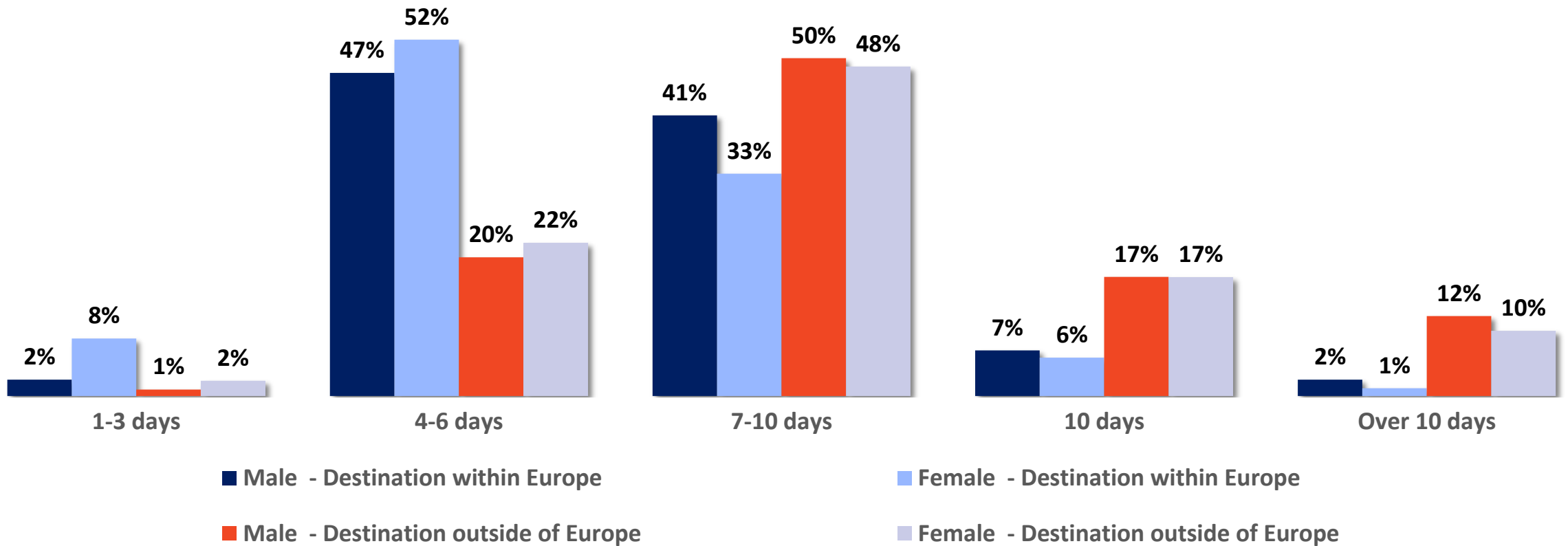
Participants with children living at home often prefer longer local trips than those without children living at home.



▶ Ideal Trip Duration

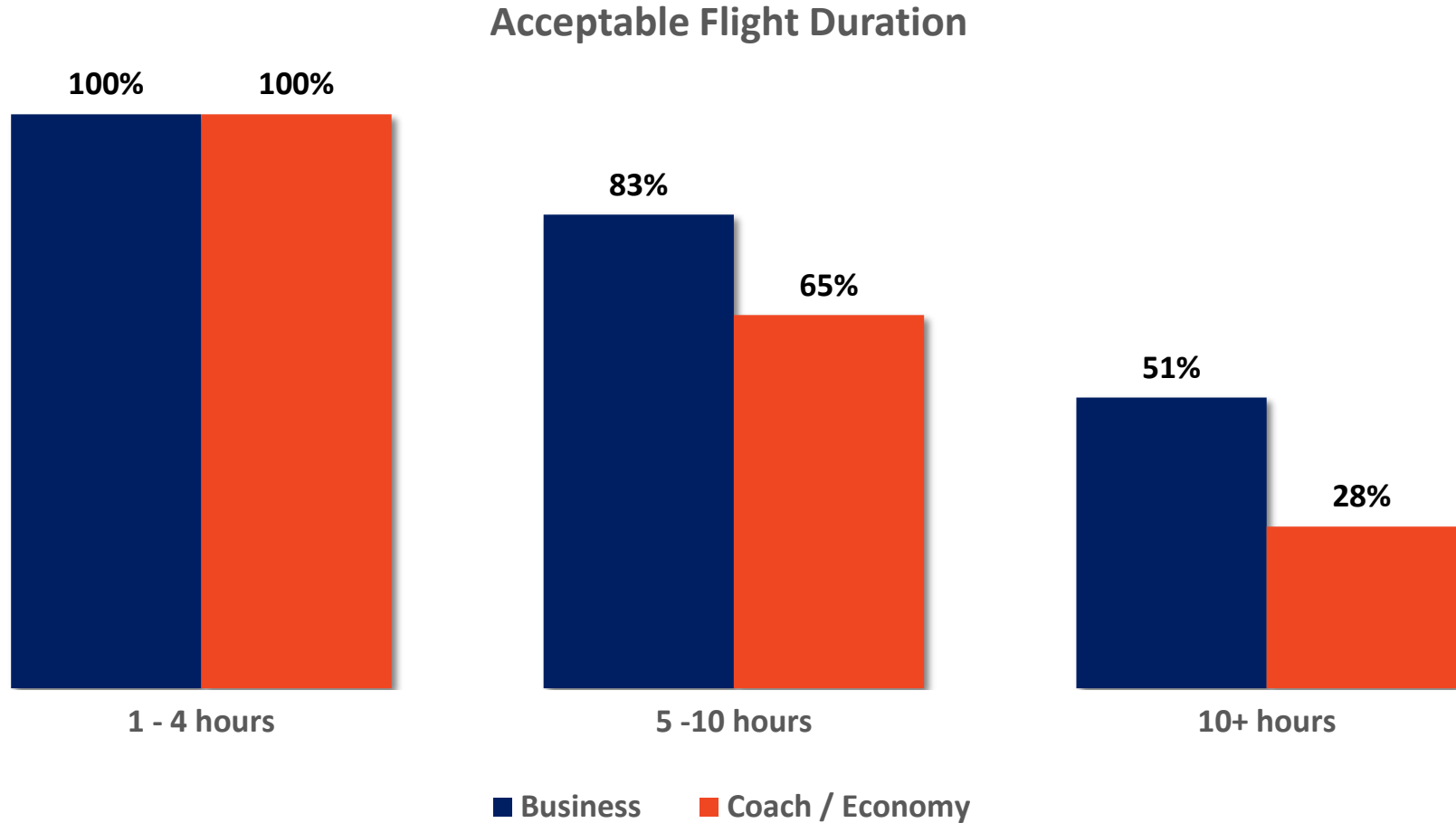
Men prefer longer trips within Europe, while both men and women are similar in intercontinental travel preferences.

Ideal Trip Duration



▶ Preferred Flight Durations

Improved comfort increases tolerance for longer journeys.



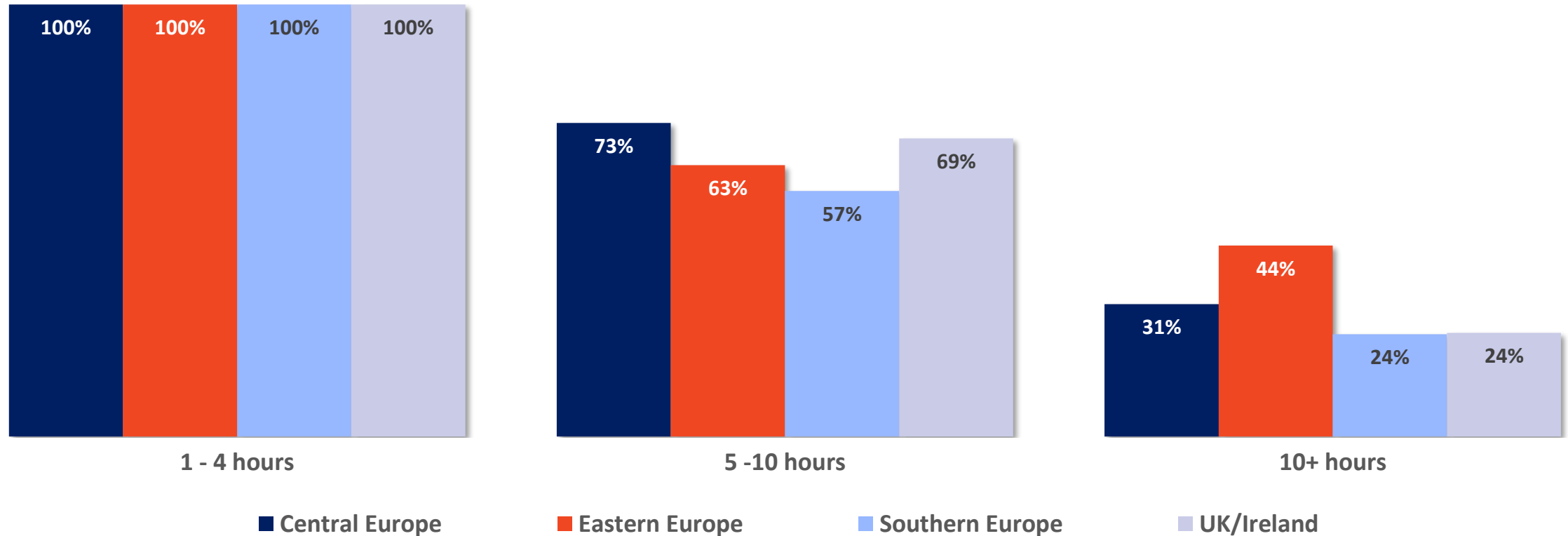
All participants find flights up to 4 hours acceptable, regardless of seating arrangements.

Economy class displays a much steeper decline in respondents who find longer flights acceptable, compared to business class, suggesting business class is the best option for longer travel.

▶ Preferred Flight Durations

While Eastern Europeans are more tolerant of longer flights, most programs participants prefer trips under ten hours in coach/economy, across all regions.

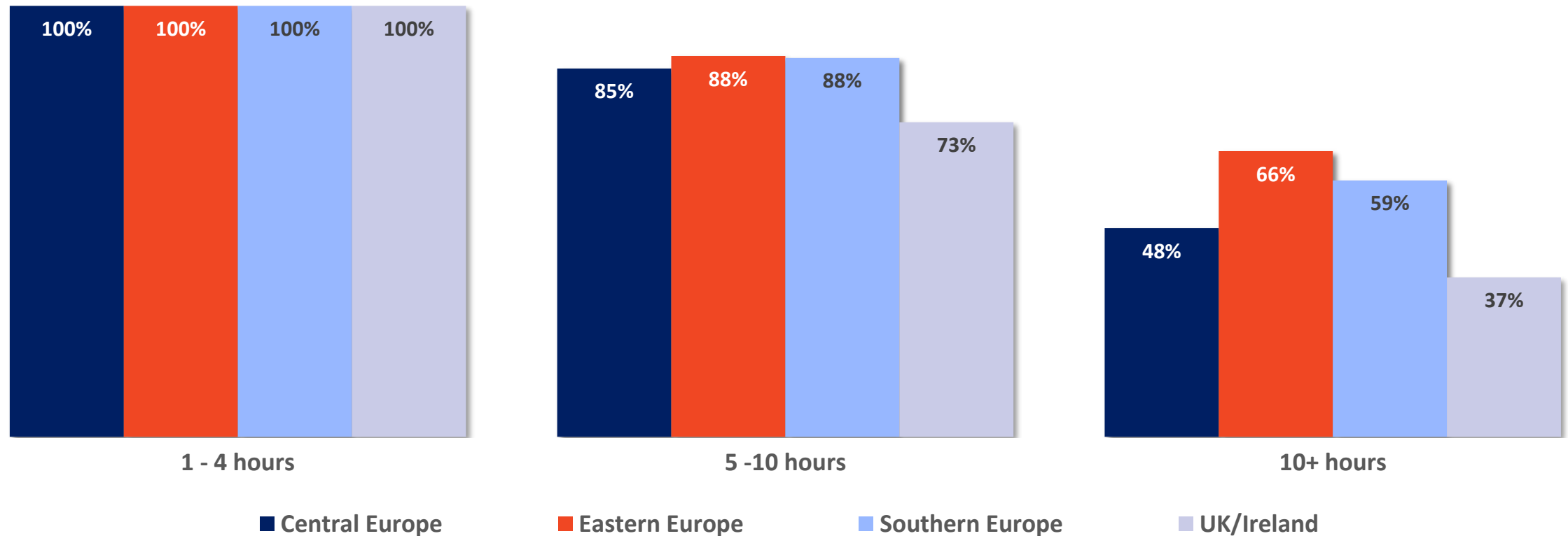
Acceptable Flight Duration in Coach / Economy



► Preferred Flight Durations

Business class boosts tolerance for longer flights, especially among Eastern and Southern Europeans, but most UK/Ireland respondents still prefer trips under ten hours.

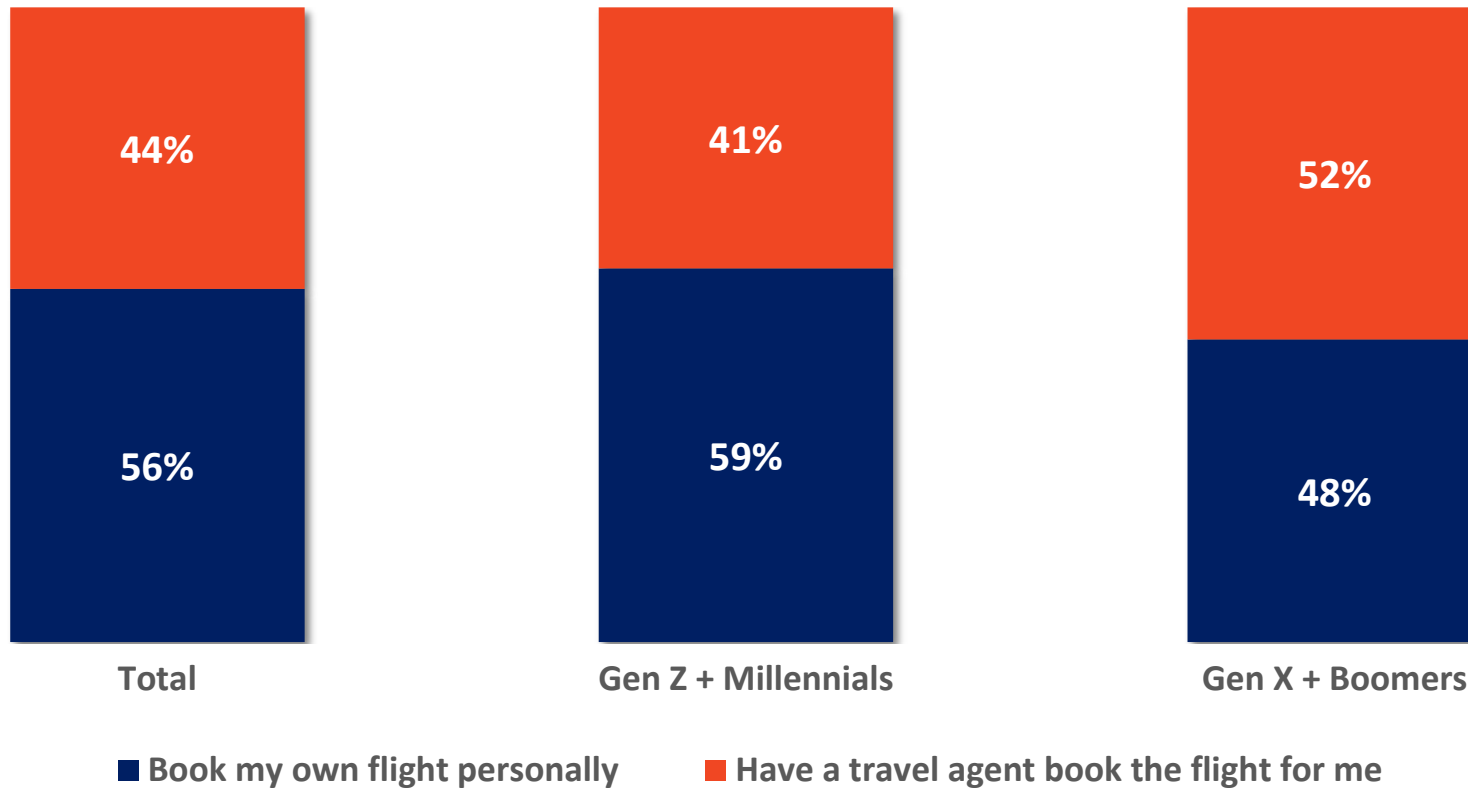
Acceptable Flight Duration in Business Class



▶ Preferred Method for Booking Incentive Travel

Offering flexible booking options is ideal in travel award program design.

Booking Method Preferences



A slight majority of participants prefer to book their own flights, indicating a desire for flexibility.

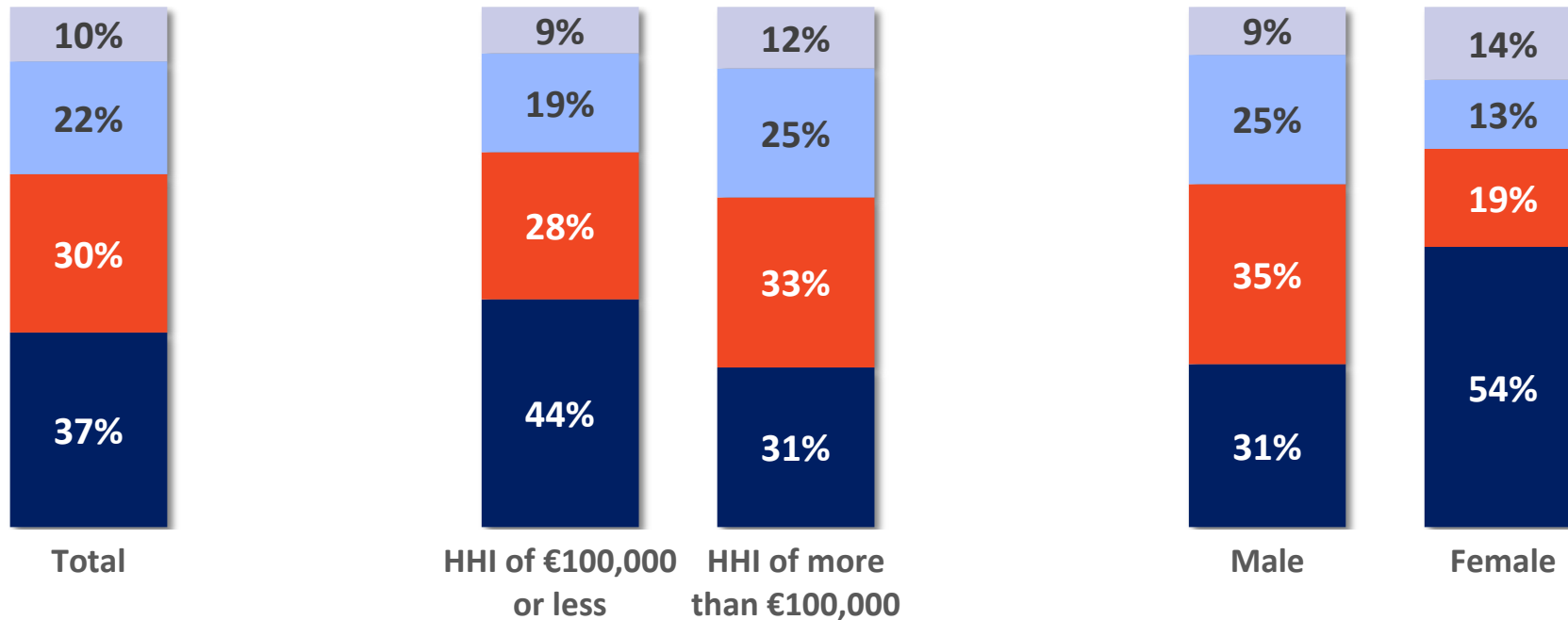
Younger participants are particularly inclined toward managing their travel arrangements, valuing control over their plans.

Older participants are more likely to rely on travel agents, highlighting a preference for professional assistance.

► Interest in Trip Extensions

Most travel award winners extend their trip, often before the official trip date.

Incentive Award Trip Extensions



■ Yes, extended both before and after the trip
 ■ Yes, extended after the end of the official trip
■ Yes, extended before the beginning of the official trip
 ■ No, did not extend either before or after the trip

Participants with higher incomes are more likely to extend their trips, indicating that they may have more flexibility or resources to do so.

Males are more likely to extend their trips in comparison to females.

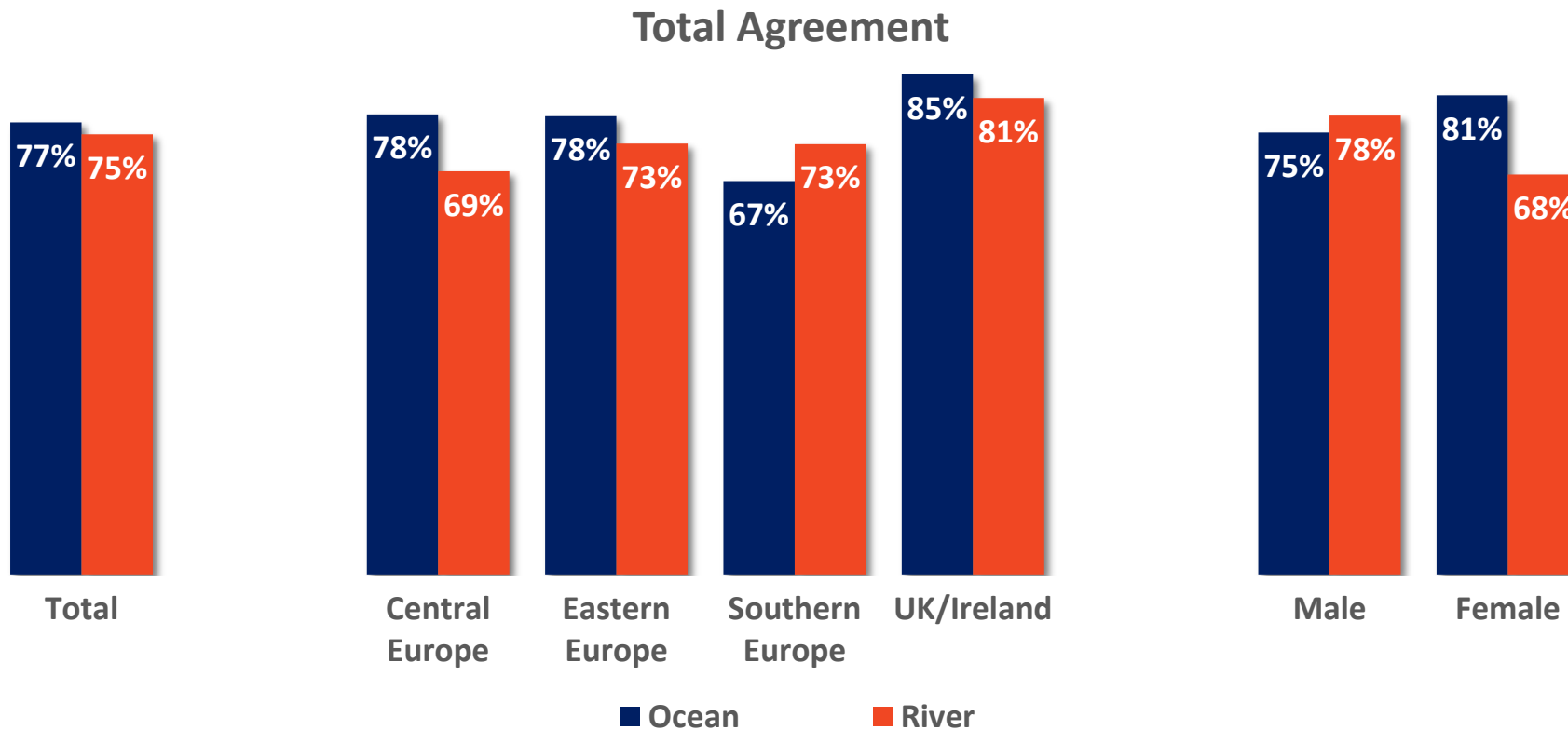


Spotlight on Cruising

▶ Perceptions of a Cruise Experience

Both ocean and river cruises are considered highly motivating incentives.

An [ocean / river] cruise trip to a desirable destination would be extremely motivating as an incentive travel award.



Participants from the UK/Ireland are the most motivated by cruise options.

Ocean cruises are less appealing to Southern Europeans, who show a slight preference for river cruises.

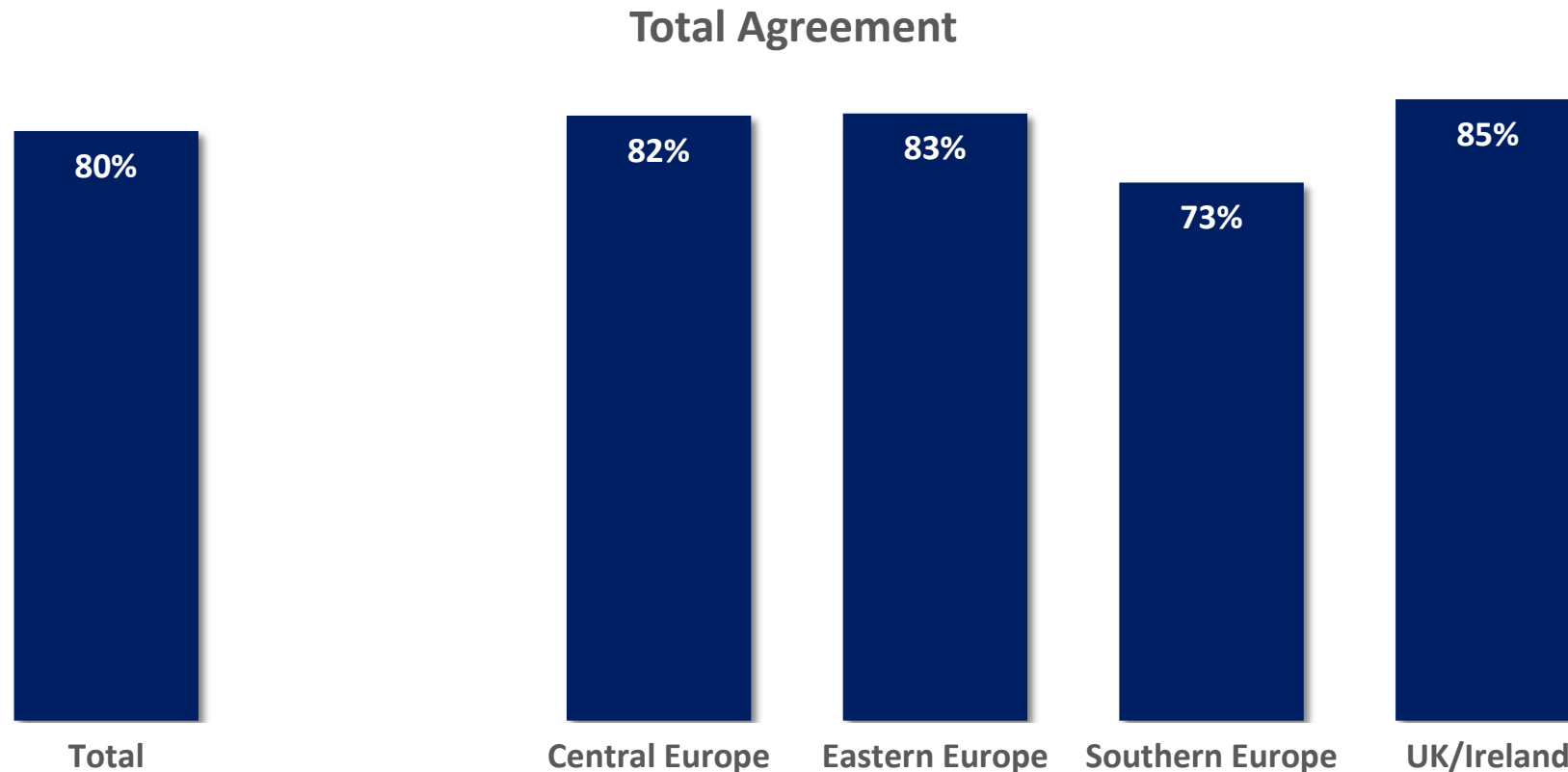
Central Europeans show a slight preference for ocean cruises over river cruises.

Females are less likely than males to be motivated by river cruises.

► Perceptions of a Cruise Experience

Cruise ships are widely viewed as safe and secure environments.

Cruise ships provide a safe and secure environment.



85% of participants from the UK/Ireland agree that cruise ships provide a safe and secure environment, the highest among regions.

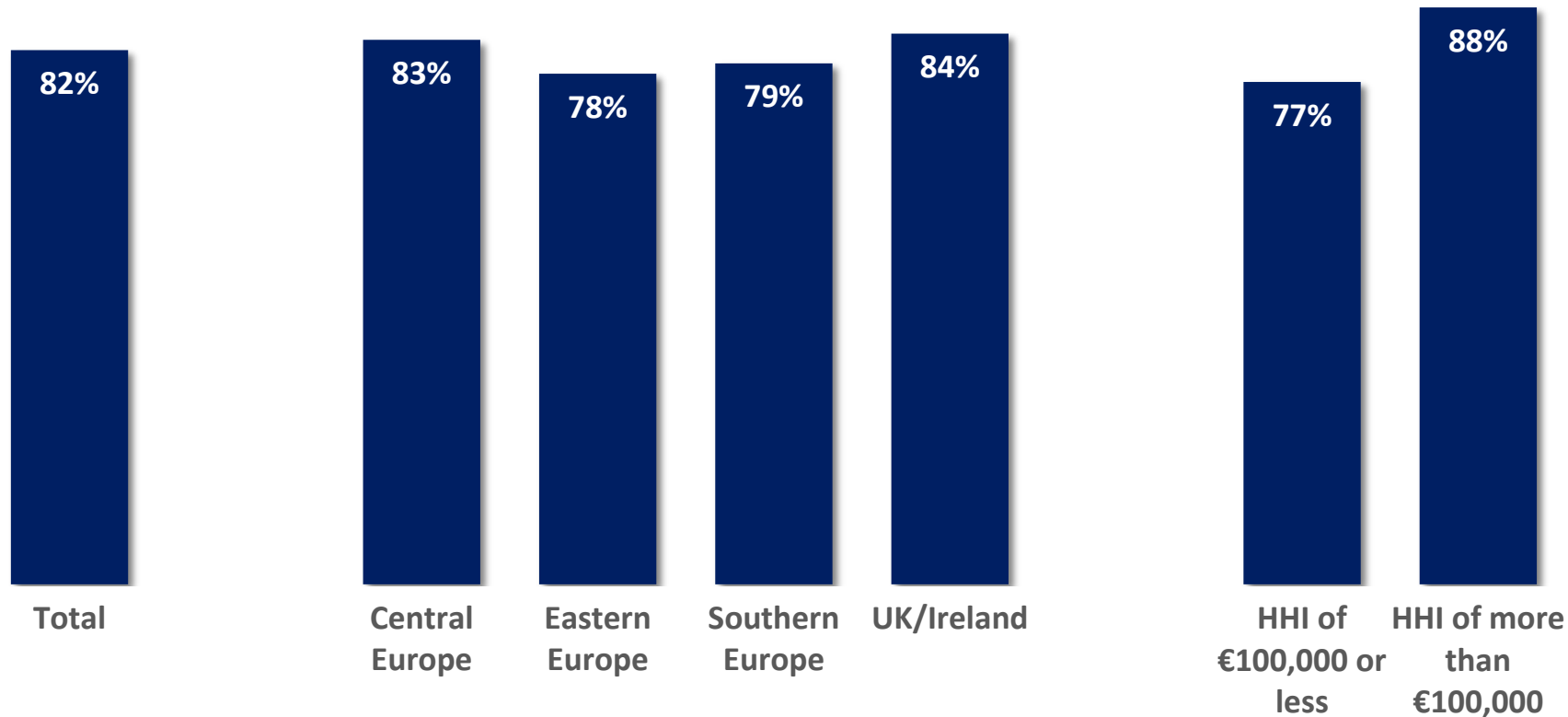
Southern Europeans show slightly lower agreement (73%), but still a strong majority view cruise ships as safe and secure.

► Perceptions of a Cruise Experience

Cruise ships are commonly viewed as comfortable and luxurious.

A cruise ship provides all the comforts of a luxury hotel.

Total Agreement



Cruise ships generally have the perception of offering the same level of comfort and luxury as a high-end hotel across all regions.

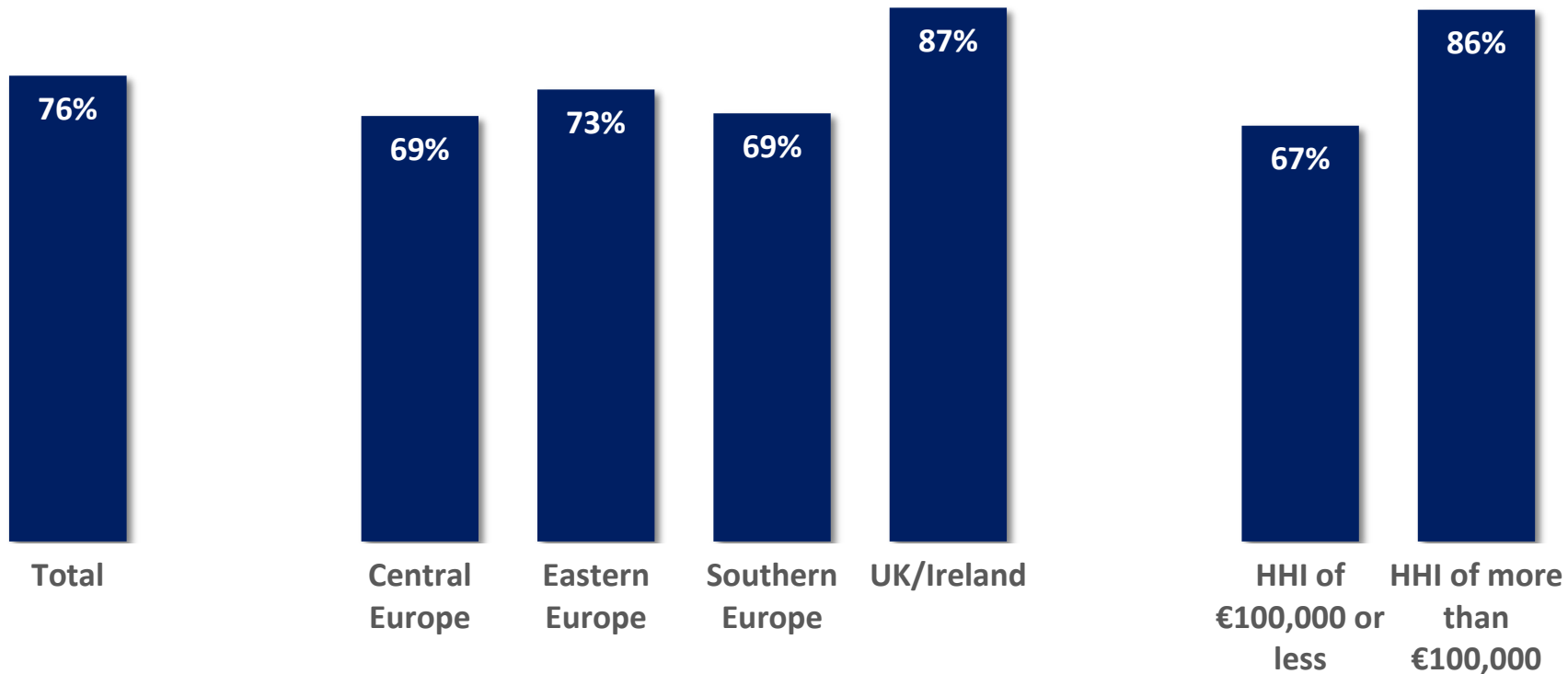
Higher earners are more likely to view cruises as offering luxury hotel-like comforts compared to lower earners.

► Perceptions of a Cruise Experience

The cruise experience is viewed as desirable, regardless of location.

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

Total Agreement



Participants from the UK/Ireland are more likely to find the cruise experience appealing, regardless of the destination, compared to other regions.

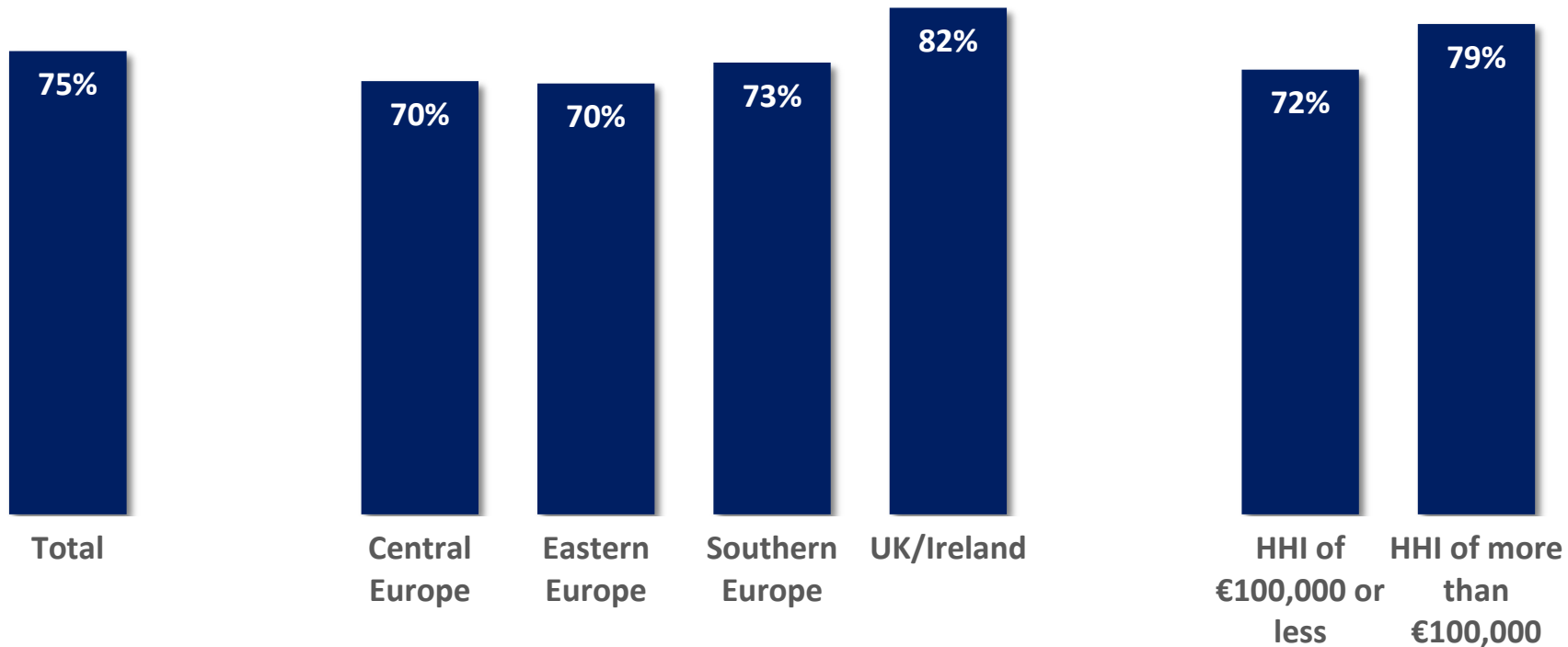
Lower earners are more drawn to cruises by destination than higher earners.

► Perceptions of a Cruise Experience

The opportunity to visit multiple, international locations increases the appeal of cruises as a travel reward.

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

Total Agreement



UK/Ireland respondents are most attracted to the idea of exploring multiple international ports by cruise.

Higher earners are more likely to prefer visiting multiple international locations by cruise compared to lower earners, suggesting a greater interest in diverse travel experiences among those with higher incomes.

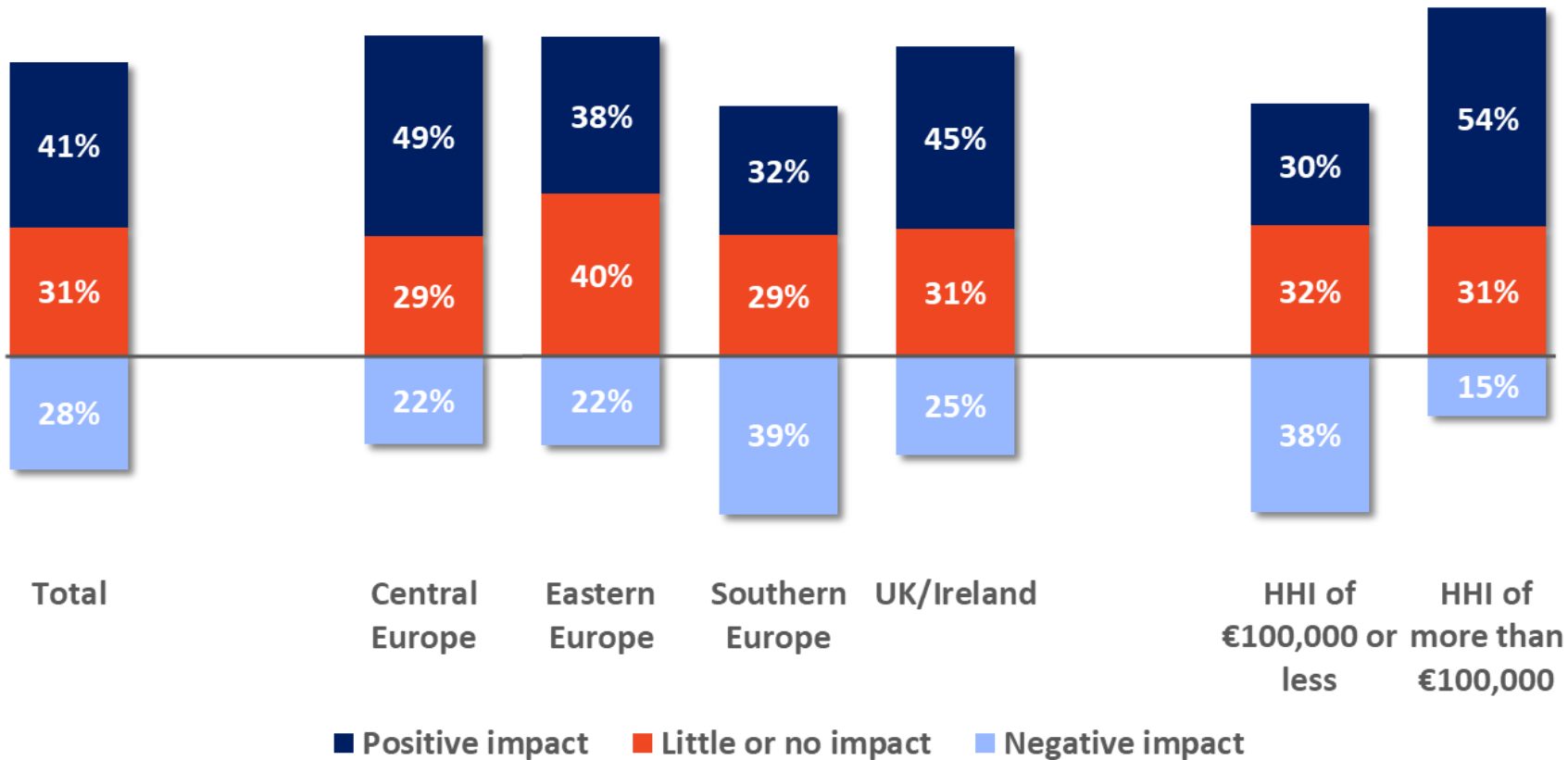


Sustainability and Incentive Reward Travel

► External Impacts on Incentive Travel

Geopolitical issues primarily have a positive or neutral impact on incentive travel, suggesting ideal destinations are aligned with less conflict.

Geopolitical issues, including conflicts



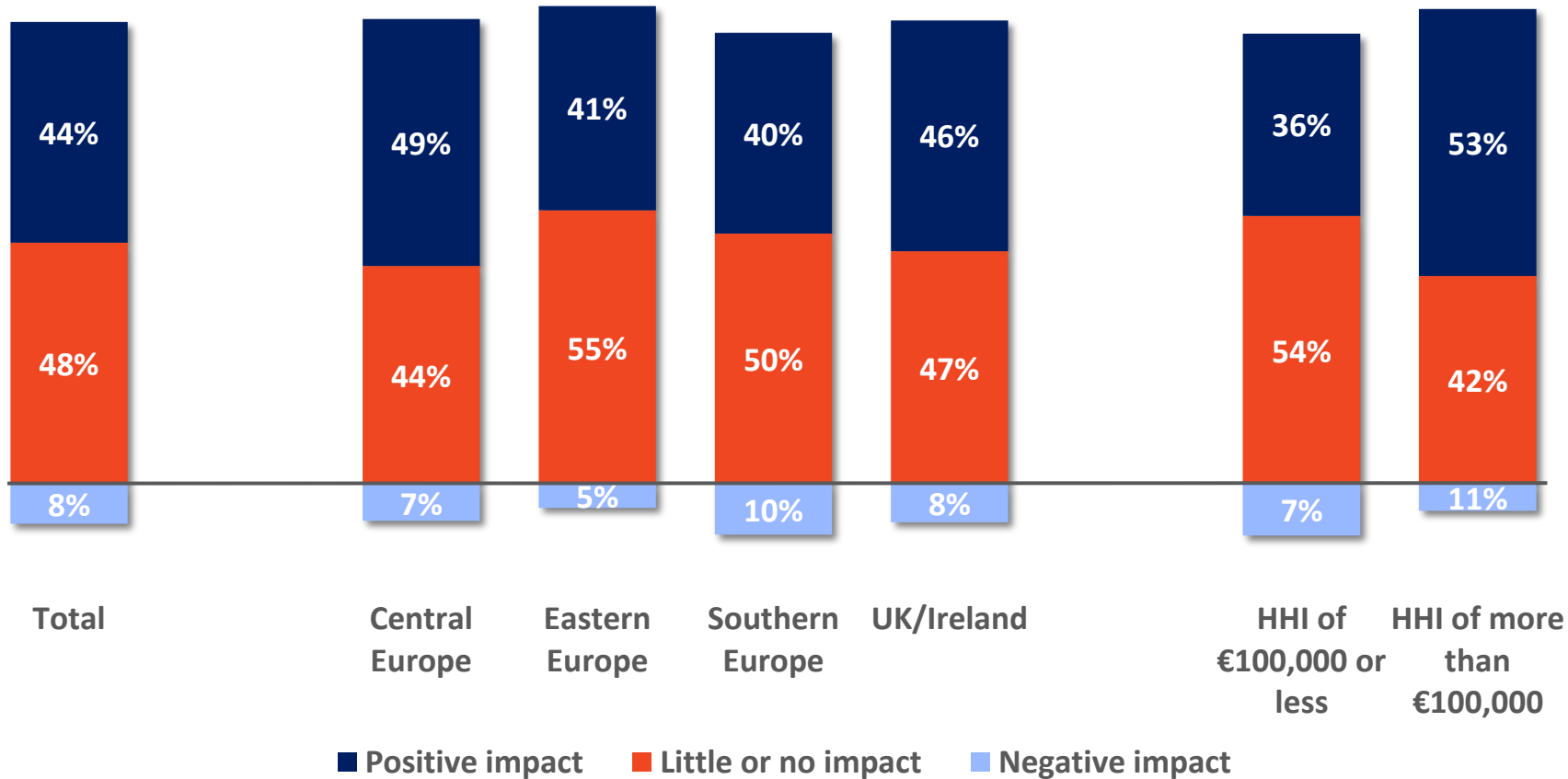
Overall, 41% view geopolitical issues positively, with Central Europeans, UK/Ireland respondents, and higher earners showing more favorable views than their counterparts.

Southern Europeans and low earners are much more likely to view conflicts as having a negative impact on incentive award travel.

► External Impacts on Incentive Travel

The use of low-cost carriers has almost entirely positive or neutral impact on the travel award.

Airline selection (i.e., use of a low-cost carrier as opposed to a full-service airline)

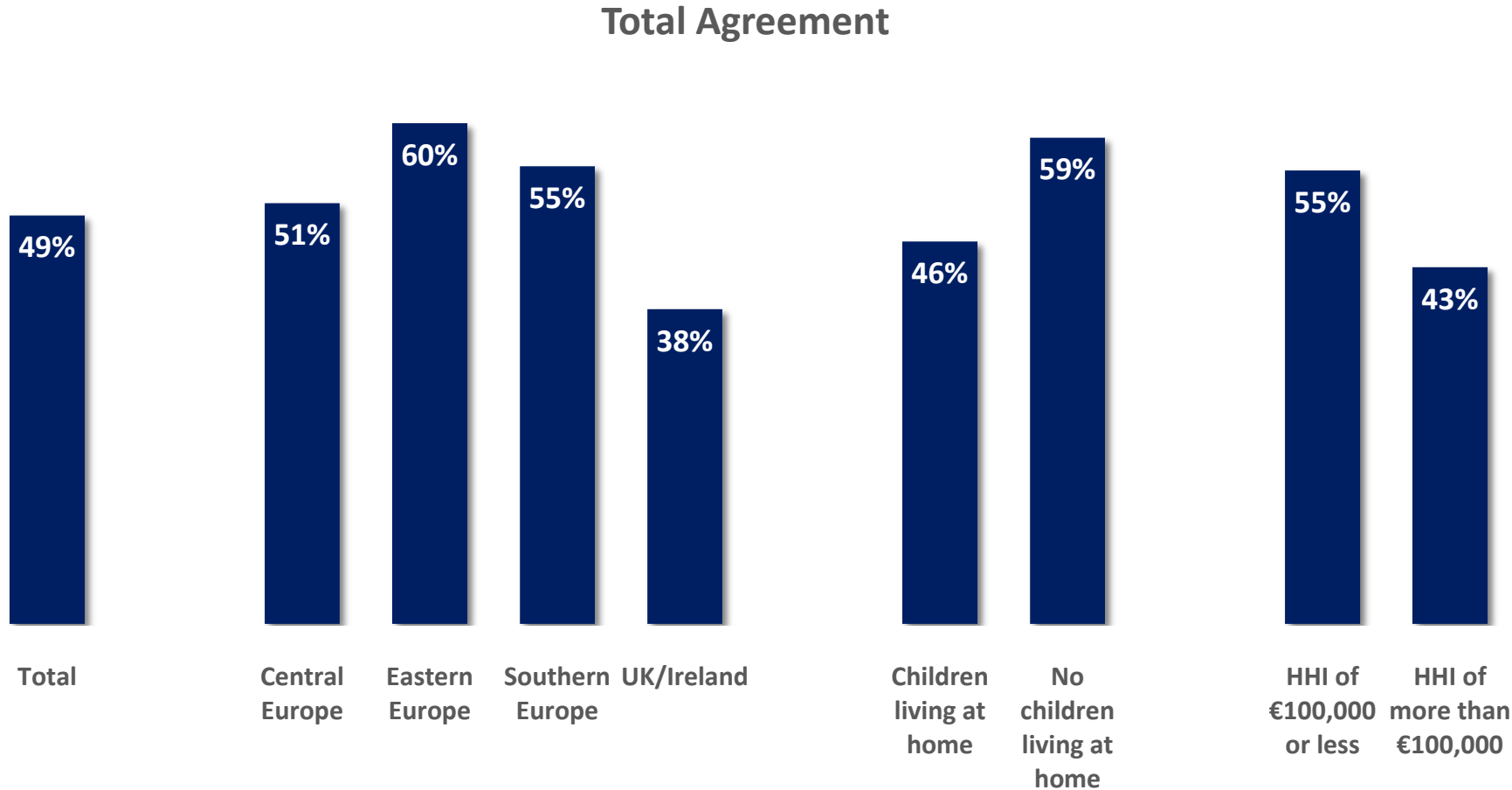


Overall, 44% of participants view the use of low-cost carriers as having a positive impact, with Central Europeans and UK/Ireland respondents having slightly more favorable perceptions than Eastern and Southern Europeans.

Lower earners tend to view low-cost carriers as having a neutral impact on reward travel, while higher earners have a more affirmative view.

► Sustainability and Perception of Incentive Reward Travel

Sustainability measures have a moderate impact on perception of the incentive travel rewards program.



Nearly half of program participants believe that sustainability measures influence the perception of the incentive travel program.

Participants without children living at home, and lower earners are more likely to emphasize sustainability when evaluating the program.

UK/Ireland participants place less importance on sustainability practices in an incentive travel program.



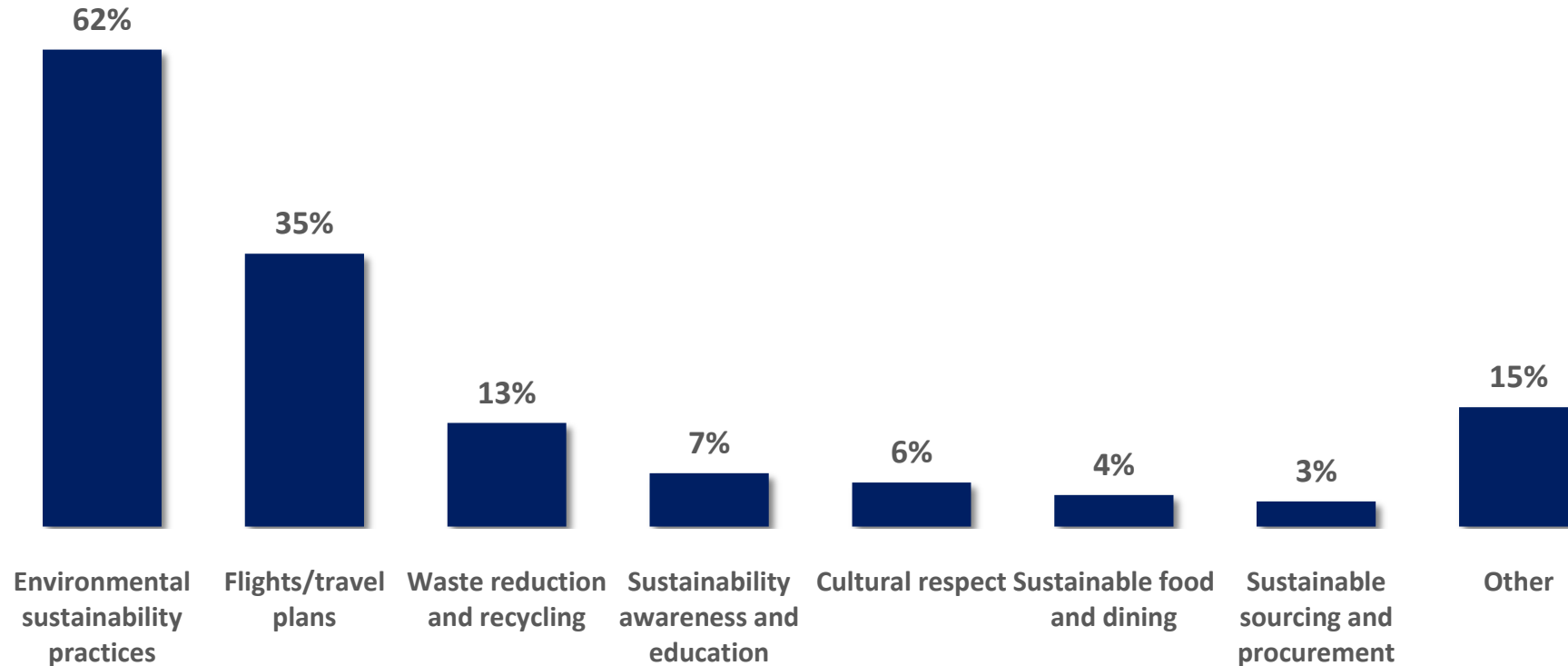
Q20: Please indicate how much you agree or disagree with the following statement. Including sustainable measures around travel, food & beverage, and impact on the destination influences perception of the incentive travel program."

Total agreement = Somewhat agree + Strongly agree

► Important Sustainability Measures

Environmental sustainability practices are the most important measure for program participants.

Important Sustainability Measures



62% of participants overall prioritize environmental sustainability practices, being in the forefront of most participant's concerns.

Other specified measures, such as flights/travel plans and waste reduction and recycling are aspects that contribute to environmental sustainability efforts.

► Important Sustainability Measures

Environmental sustainability is a key concern across most regions, except for Eastern Europeans, who focus on flight/travel plans and other factors.

Important Sustainability Measures

