



2025 EUROPEAN ATTENDEE PREFERENCES FOR INCENTIVE TRAVEL

Introduction

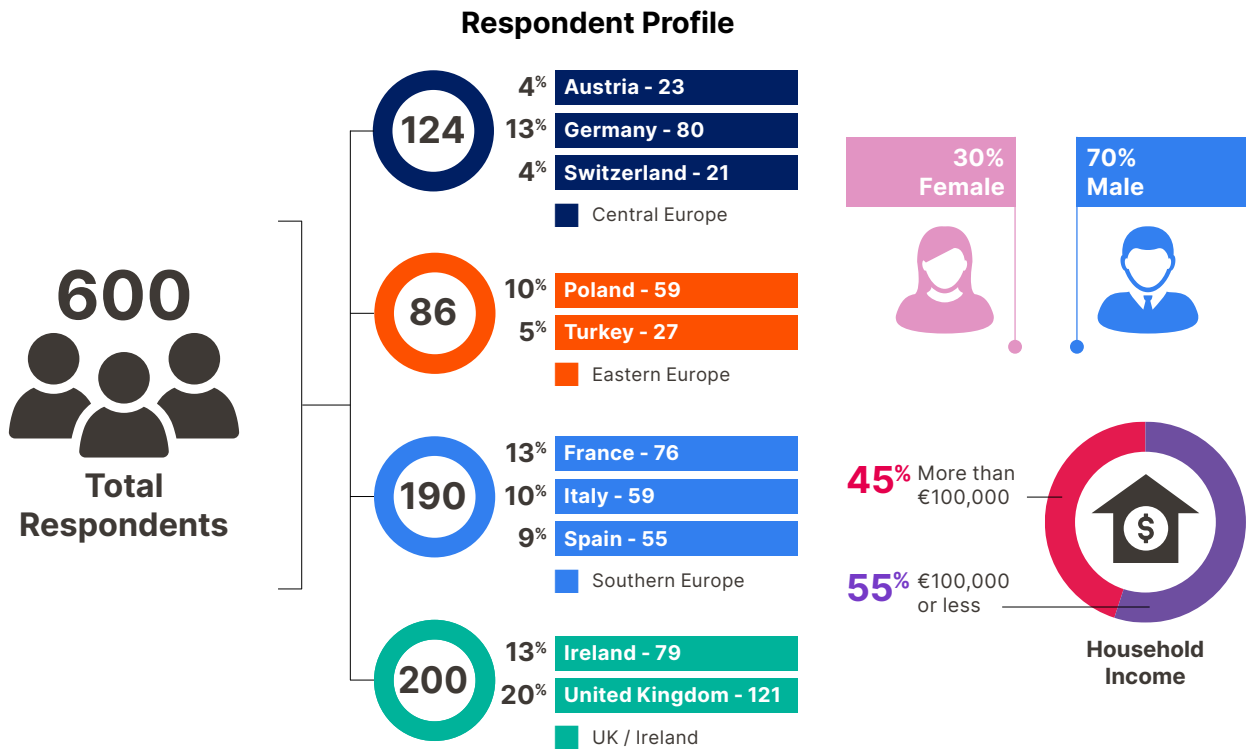
As a high-value experience, incentive travel remains one of the most impactful ways an organization can drive employee performance and strengthen company culture. To maximize the effectiveness of these programs, it's crucial to design them with careful attention to both the destination and the experiences offered. Whether it's a relaxing beach retreat, an adventurous mountain escape, or a culturally immersive city trip, the right destination, accommodations, and activities ensure that employees fully engage with and appreciate the reward.

Designed and commissioned by the Incentive Research Foundation, the *2025 European Attendee Preferences for Incentive Travel* study builds on a similar study conducted in North America, providing valuable insights into the specific preferences and motivations of European employees. By identifying what participants value most in terms of destination features, travel accommodations, and overall program design, the study offers a data-driven foundation for companies to create more personalized and effective incentive travel programs.

Research Overview

The *2025 European Attendee Preferences for Incentive Travel* study, conducted in the fourth quarter of 2024, surveyed 600 full-time employees from across Europe. Respondents were selected from sales and marketing roles, who were all eligible for an incentive travel award within the past three years to ensure the relevance of their insights.

The survey was distributed across three key regions: Central Europe (including Austria, Germany, and Switzerland), Eastern Europe (including Poland and Turkey), Southern Europe (including France, Italy, and Spain), and the UK/Ireland, providing a broad perspective of the region. Respondents represented a diverse range of industries, including retail, IT, manufacturing, professional services, banking, education, and healthcare, among others. The respondent pool was predominantly male (70%), ranging in age from 23 to 65 years old. Notably, 71% were from the Gen Z and Millennial age groups, while 29% were from Gen X and Baby Boomer generations. Additionally, 79% of respondents have children living at home.



It is important to note that 69% of study respondents have previously won an incentive travel award within the last three years. Noting that this concentration is considerably higher than the general population of incentive reward program participants, response data has been analyzed by each of the various demographic segments. Significant differences are noted where there is potential for organizations to tailor their incentive travel award program to their specific employee base.

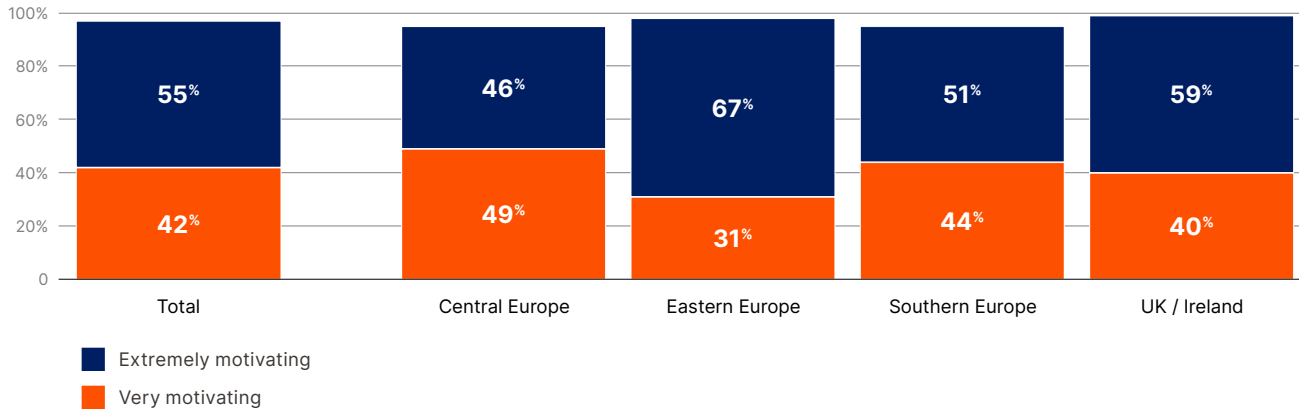
Key Findings

Incentive Travel Awards Have High Motivational Appeal

Nearly all employees eligible for incentive travel (99.8%) find at least some value in the award, with over 75% reporting that it holds ‘a great deal of value.’ This strong sentiment is particularly pronounced among recent travel award winners but is consistent across all respondent groups.

Group travel rewards also hold significant appeal, with 97% of participants indicating they are motivated by the award, and 55% finding group travel ‘extremely motivating.’ Eastern Europeans are especially drawn to group travel, as over 67% describe this incentive award as ‘extremely motivating.’ Additionally, women are 16% more likely than men to find group travel ‘extremely motivating’ (66% versus 50%).

Group Travel Reward Motivation



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?

These findings highlight the powerful role that both individual and group incentive travel can play in motivating employees. However, this appeal is contingent upon selecting a desirable destination, which underscores the importance of understanding what destinations resonate most with employees.

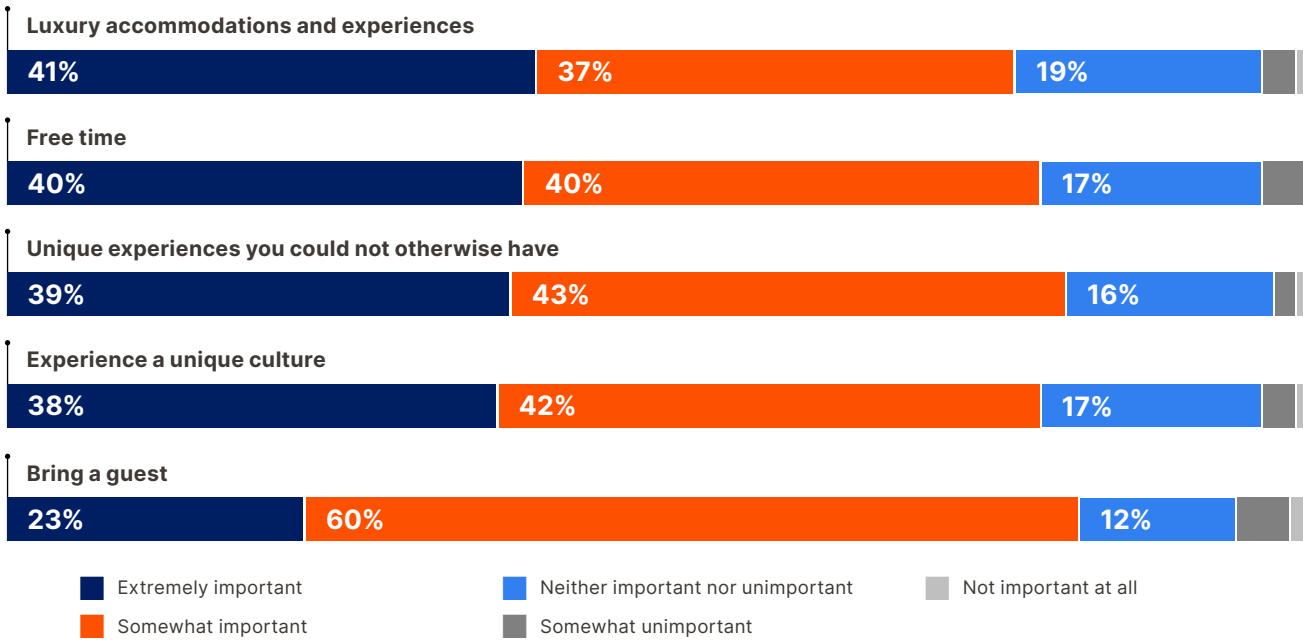
Exciting Destinations Include a Multi-Faceted Structure

- **Luxury Accommodations:** 78% of respondents indicate that luxury accommodations are an important feature of an incentive trip. Preferences vary, with some favoring private units within larger resorts and others seeking the exclusivity of a private vacation residence. Regardless, staying at 5-star hotels or luxury resorts, whether large or boutique, significantly enhances the overall appeal of the experience.
- **Opportunities for Relaxation and Disconnecting:** The ability to unwind and fully enjoy the destination is highly valued. 80% of respondents consider free time for relaxation an essential feature, with it later being the highest-ranked factor in terms of incentive trip appeal. A trip that allows employees time to recharge makes the experience even more enticing.
- **Ability to Bring a Guest:** 83% of respondents consider the opportunity to bring a guest – whether a spouse, significant other, or a person of their choosing – a key feature of the incentive experience. This option to share the reward with someone special dramatically boosts the overall value and appeal of the trip.
- **All-Inclusive Packages:** While not ranked as highly in terms of appeal, all-inclusive packages that cover meals, activities, and accommodations are the most commonly cited feature that motivates employees to reach performance goals. The convenience and ease of an all-inclusive trip make the reward more accessible and enticing, ensuring a stress-free experience.
- **Cultural and Unique Experiences:** Ranked third among the most appealing features, employees are particularly drawn to experiences that offer cultural immersion or once-in-a-lifetime opportunities. Whether through local tours, guided activities, or unique experiences, the chance to explore new cultures is highly valued by participants.

While there are some fluctuations in rankings, particularly by region, the overarching features that emerged from the survey consistently ranked at the top. These variations, explored further in the reference deck, offer valuable insights into regional preferences and highlight the importance of tailoring incentive programs to specific employee demographics.

Important Features of an Incentive Travel Experience

Destination within Europe



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

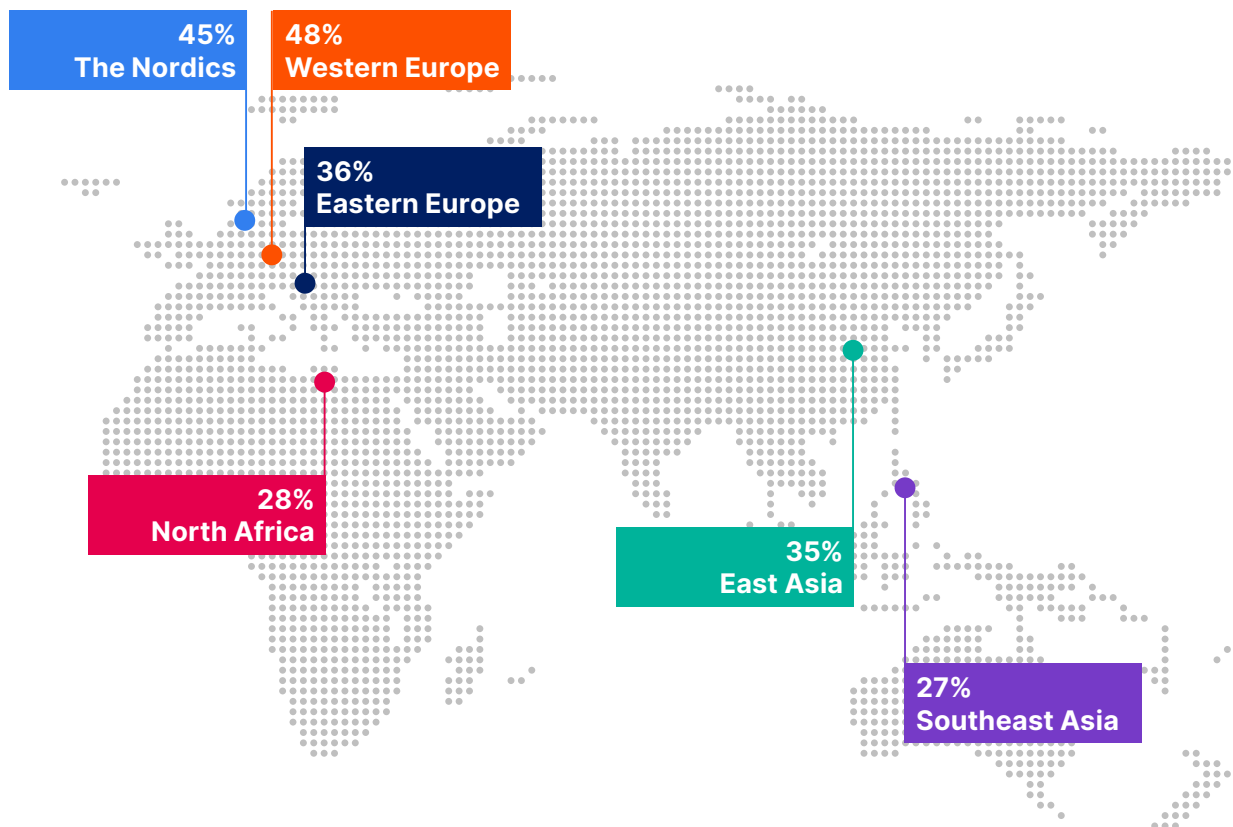
Employees Favor European and Asian Travel Destinations

Considering all of the important features of an incentive travel reward, study participants identify European and Asian destinations as those with the greatest appeal. These following regions offer the allure of both familiar and unique experiences that resonate with employees across various demographic groups:

- **Western Europe** ranks as the most highly motivating destination, with 48% of all respondents selecting it as one of their top choices. This is particularly true for Eastern (58%) and Central (57%) Europeans, where proximity and cultural similarities seem to heighten the appeal of Western European locations. The region is seen as offering a blend of rich history, vibrant cities, and luxurious accommodations, making it an attractive choice for incentive travel.
- **The Nordics** follows closely behind, with 45% of respondents naming it as a preferred destination. The appeal of the Nordics is particularly strong in Southern (48%) and Central (47%) Europeans. Known for their natural beauty, high-end experiences, and opportunities for relaxation, the Nordics provide a serene and distinctive experience that many employees find motivating.

- **Eastern Europe** also holds significant overall appeal, with 36% of respondents selecting it as a top choice. It is particularly favored by respondents from Southern Europe (39%), the UK/Ireland (37%), and Central Europe (37%). However, it is significantly less appealing to Eastern Europeans (28%), who tend to prefer traveling outside of their respective region.
- **East Asia** (35%) and **North Africa** (28%) round out the top five, offering exotic, cultural experiences and opportunities for adventure and relaxation. These destinations are particularly appealing to younger generations, such as Gen Z and Millennials, who seek unique, culturally immersive experiences.

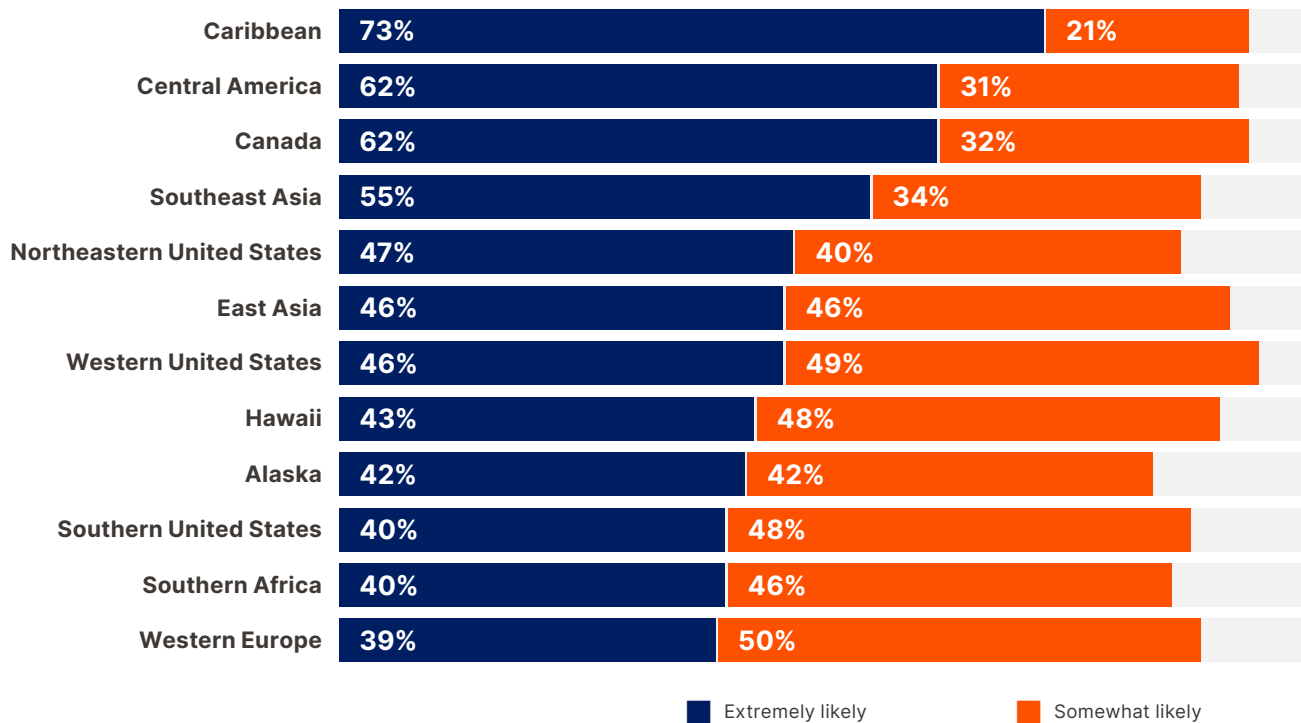
Most Motivating Destinations



Please choose the destinations that would motivate you the most if an incentive award trip were to be offered to these locations.

When respondents were asked to recommend incentive destinations based on their prior experience travelling, these destinations continued to be viewed as favorable. However, among those who have previously traveled to North America for business or leisure, certain destinations received high recommendations for future incentive travel. While Europe remains the clear preference, this suggests that exposure and firsthand experience may play a role in shifting perceptions of long-haul destinations.

Incentive Destination Recommendations Based on Previous Experience



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

While these destinations are favored across various demographic groups, the study found that preferences can differ based on region and individual characteristics. For instance, higher earners tend to prefer more localized travel, while lower earners are more inclined toward intercontinental destinations. Additional regional and demographic insights can be found in the study's reference deck.

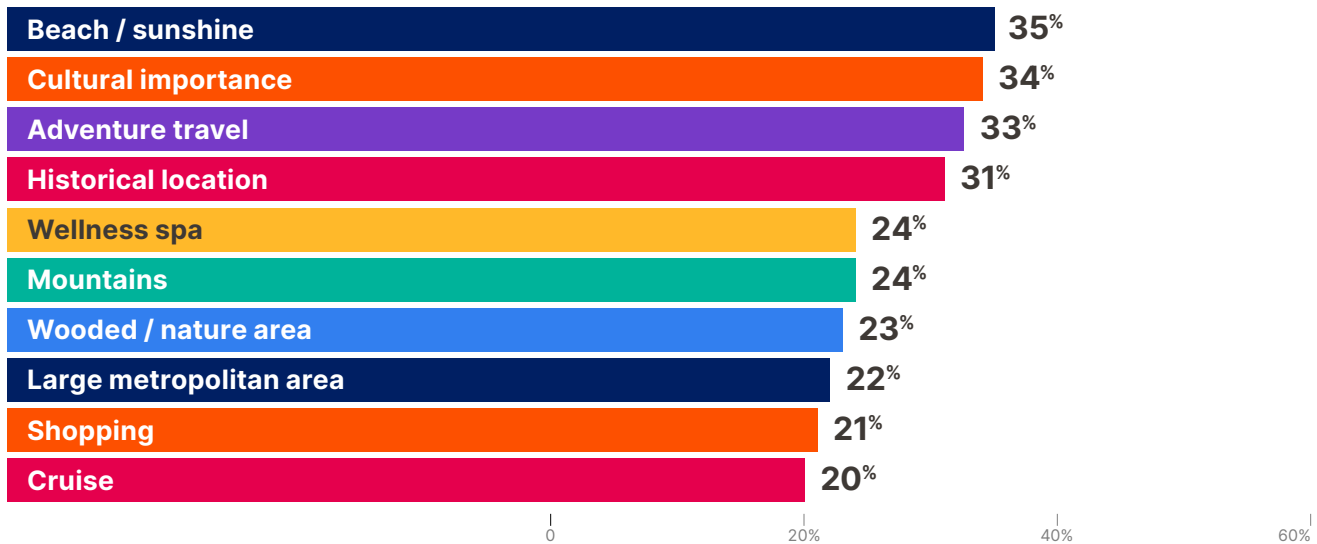
Enticing Destinations Should Feature Beaches or Sunshine, Adventure, and Cultural Immersion

Looking beyond regional destinations, respondents identified features and experiences that a destination should include to make it an ideal location for incentive travel. Responses indicate truly desirable reward trips provide a balance of both relaxation and adventure. The most successful incentive travel destinations are those that provide a variety of experiences, ensuring that every participant finds something to enjoy. The following destination features ranked highest among employees, making them essential elements of any attractive incentive travel program:

- **Beach/Sunshine:** Destinations that offer beach or sunny environments emerged as a priority, with 35% of respondents ranking it in the top three, the most highly ranked feature overall. This preference was particularly prominent among female participants (42%) and those with lower incomes (39%). The allure of a beach or sunny destination offers a relaxing atmosphere, perfect for unwinding and rejuvenating.

- Cultural Importance and Historical Locations:** Coming in a close second, cultural immersion has significant appeal, with 34% of respondents noting that travel experiences rich in local culture are particularly motivating. This includes exploring historical locations, which was also ranked highly, with 31% indicating this feature in their top three preferences. Women (38%) and recent incentive travel award winners (37%) were most likely to value cultural experiences, while Southern Europeans (42%) find much stronger appeal in historical locations. These types of destinations offer employees the opportunity to learn, grow, and enrich their travel experience, making them more memorable and rewarding.
- Adventure Travel:** Ranked third, 33% of respondents expressed strong interest in adventure-based destinations, including activities such as hiking and other outdoor expeditions. Mountainous and wooded/nature areas also ranked highly. Males (35%) and individuals without children living at home (37%) were particularly drawn to the thrill of adventure travel. Additionally, respondents from Eastern Europe (43%) and the UK/Ireland (37%) also demonstrated a stronger preference for adventure, suggesting that regions known for adventure sports or natural wonders have significant appeal in incentive programs.

Preferred Destination Features



Beyond geographic location, please rank the following types of destinations/experiences in order of preference.

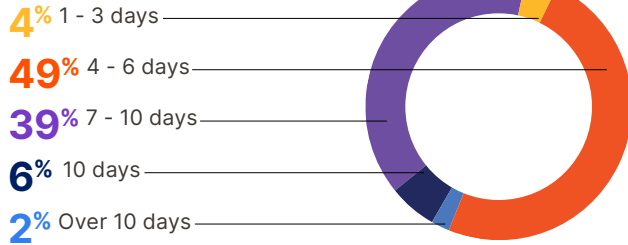
The Ideal Trip Length Varies Between Four and Ten Days

When it comes to the ideal length for incentive travel trips, preferences vary, but clear trends emerge. For both European and intercontinental destinations, employees generally favor trips that last between four and ten days, with European destinations leaning toward the shorter end (four to six days) and those outside Europe favoring slightly longer stays (seven to ten days).

For destinations within Europe, 49% of respondents prefer trips lasting four to six days, followed by 39% who prefer trips lasting seven to ten days. Only a small portion (6%) favor longer stays, and just 4% prefer shorter trips of one to three days. Similarly, when considering destinations outside of Europe, 49% prefer trips lasting seven to ten days, with 21% choosing trips lasting four to six days. Fewer respondents prefer longer trips over ten days (11%), and just 1% favor shorter trips.

Ideal Trip Duration

Destination within Europe



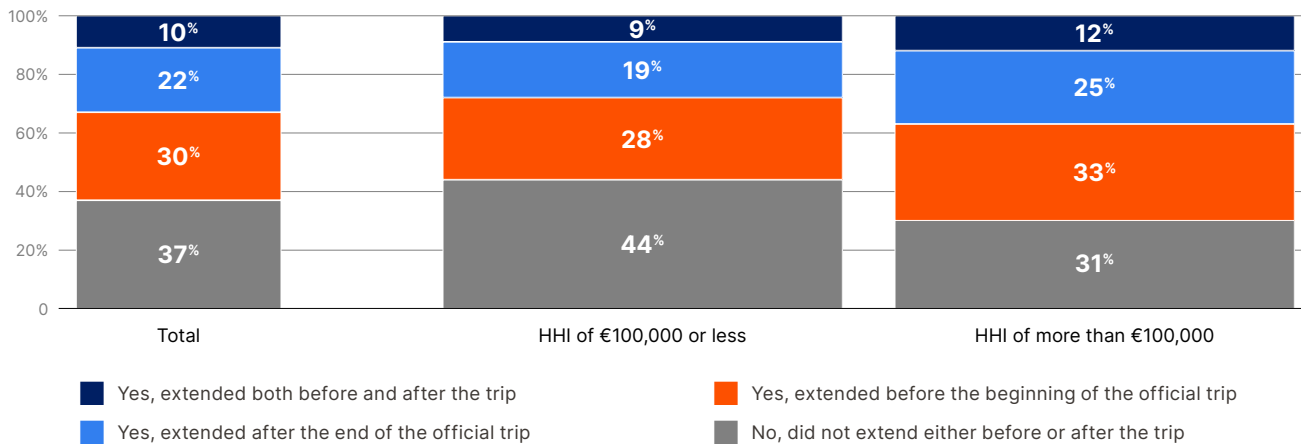
Destination outside of Europe



*What is the ideal length of an annual incentive travel award trip within Europe?
What is the ideal length for an incentive travel award trip taken outside Europe?*

Gender differences also emerge. Men are more likely than women to extend their trips before or after the official incentive period, with 35% of men choosing to extend their trips before the official start, compared to just 19% of women. On the other hand, women are more likely to prefer shorter trips, with 52% favoring four to six days for travel within Europe.

Interest in Trip Extensions



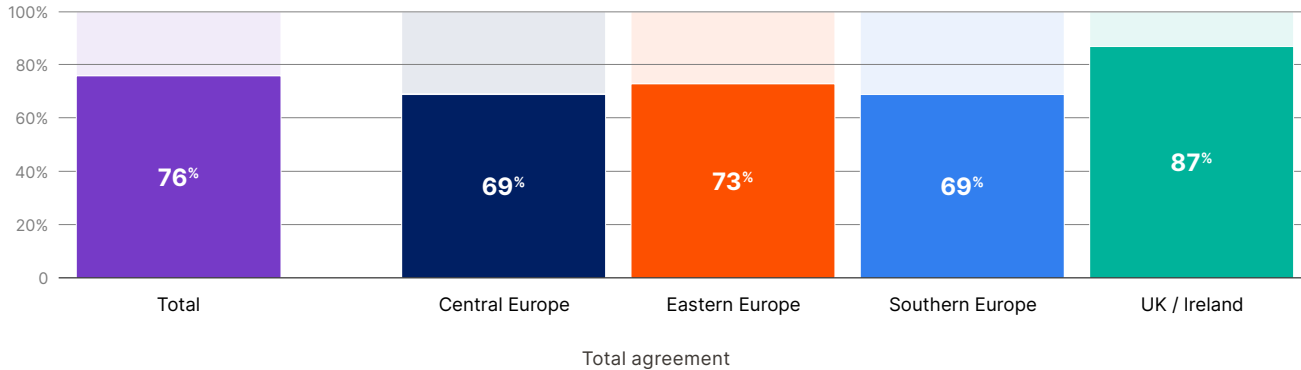
...During your most recent incentive award trip, and you extend your trip, either before or after the official start or end of the incentive award trip?

Individuals earning over €100,000 are more likely to extend their trips, with 12% extending both before and after the official travel period, compared to just 9% of those with lower household incomes. This difference suggests that employees with higher incomes may have more flexibility and are more inclined to extend their stay.

Cruising: An Opportunity for All-Inclusive Travel

Cruising remains an incredibly appealing option for incentive travel, primarily because of the all-inclusive packages they offer. Despite being ranked lower than other destinations features, cruises provide a unique combination of convenience and luxury, including accommodations, meals, and entertainment, all bundled into one experience. This makes them an attractive choice for employees looking for a seamless, hassle-free travel experience.

Cruise as a Motivating Travel Award



The cruise experience itself is a desirable destination, regardless of where the cruise is scheduled to go.
 Total agreement = Strongly Agree + Somewhat agree

Both ocean and river cruises are strong motivators for incentive travel awards. Overall, 77% of program participants say that an ocean cruise to a desirable destination is extremely motivating, while 75% feel the same about a river cruise. Regionally, respondents from the UK/Ireland show the highest level of enthusiasm, with 85% supporting ocean cruises and 81% favoring river cruises. Central and Eastern Europeans (78% each) also demonstrate strong enthusiasm for ocean cruises, though finding less interest in river cruising. Only Southern Europeans prefer river cruises over ocean cruises (73% versus 67%), but as a region, they are less inclined to be motivated by cruising overall.

Beyond the appeal of specific destinations, respondents overwhelmingly agree on the comfort and security that cruises provide. 80% of employees agree that cruise ships offer a safe and secure environment, and 82% believe they provide the same level of comfort as a luxury hotel. Additionally, 76% of respondents consider the cruise experience itself a desirable destination, regardless of where the cruise is scheduled to go, and 75% prefer the idea of exploring multiple international ports-of-call by cruise rather than staying at a hotel in just one location.

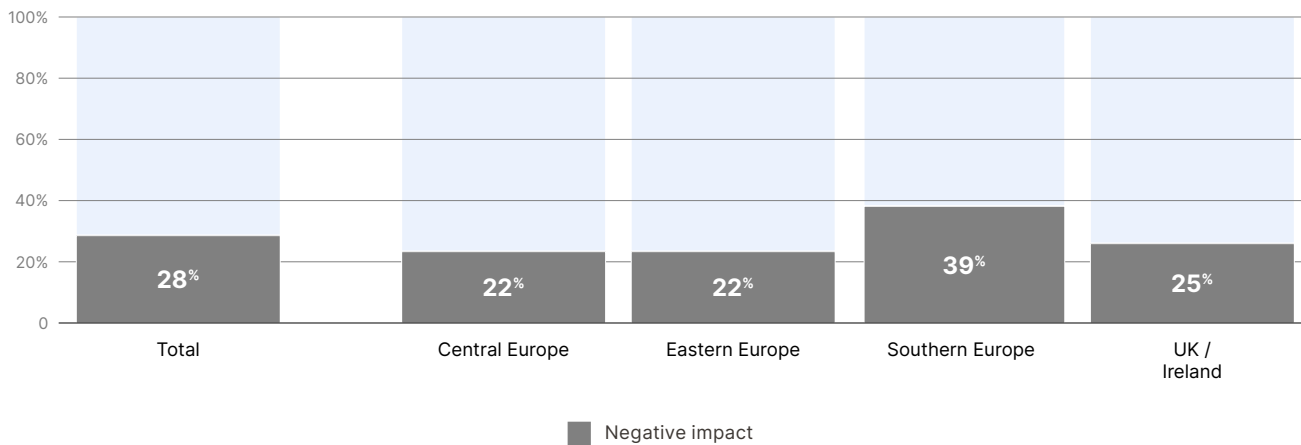
These statistics highlight how cruising can offer an ideal incentive travel experience. The all-inclusive nature of cruises, combined with their safe and luxurious environment, makes them a top choice for employees seeking motivation through travel. Whether it's an ocean cruise with expansive amenities or a more intimate river cruise experience, cruises continue to captivate employees across diverse demographic groups.

Sustainability and External Factors Shape Perception of Incentive Travel Programs

Sustainability and external factors increasingly impact how employees view incentive travel programs. A notable 28% of respondents indicate that geopolitical issues, such as conflicts and instability, can have a negative effect on their perception of incentive travel rewards. This sentiment is particularly pronounced among Southern Europeans (39%) and lower-income earners (38%). Responses suggest the importance of considering global and political contexts when planning incentive travel, as these factors can affect both employee satisfaction and program success.

External Impacts on Incentive Travel

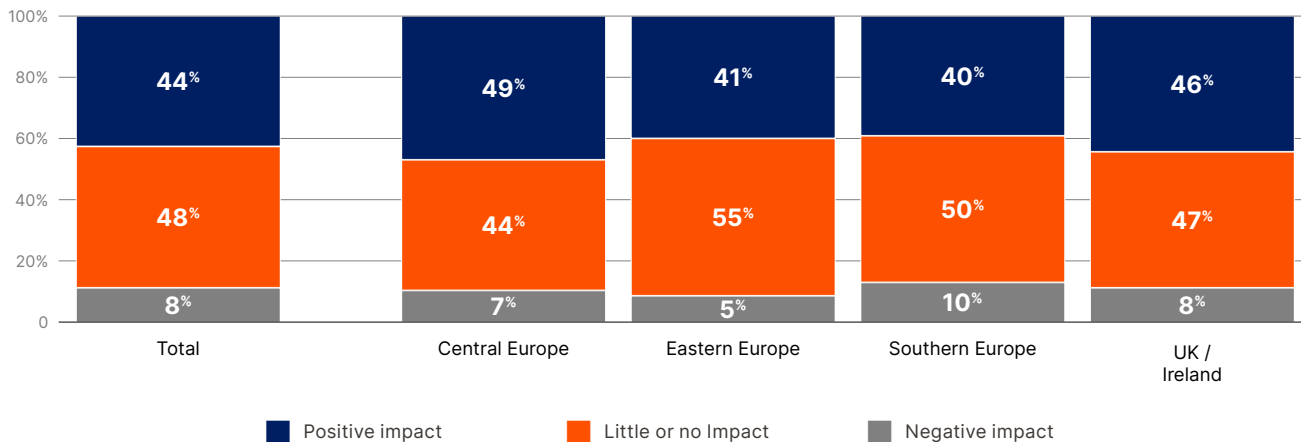
Geopolitical issues, including conflicts



Please indicate what type of impact each of the following have on your perception of incentive award travel.

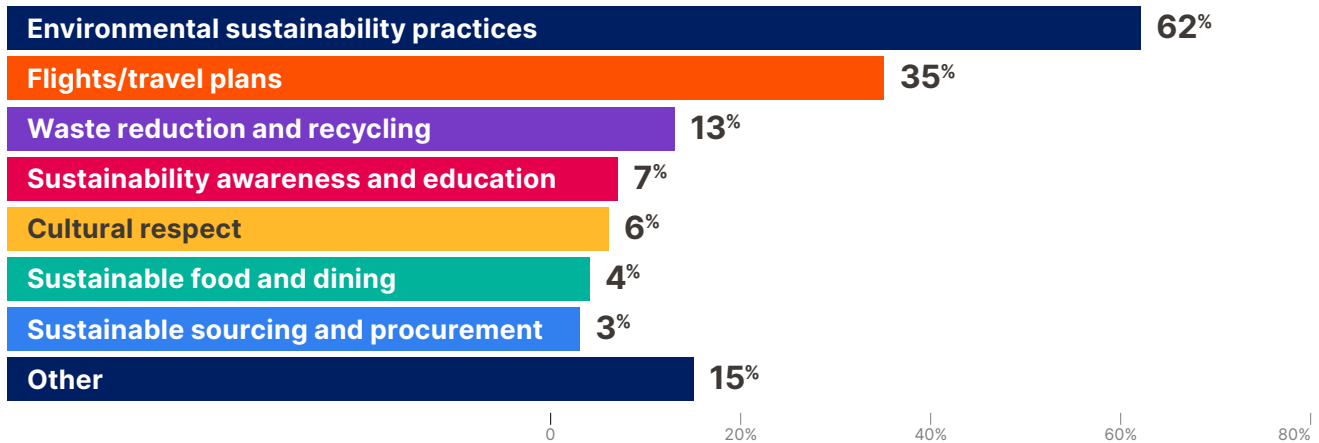
In addition, the choice of airline plays a significant role in shaping perceptions. The use of low-cost carrier airlines, compared to full-service airlines, has a positive impact on 44% of respondents, with only 8% indicating a negative effect. This trend reflects the growing desire for more sustainable and budget-conscious travel options, signaling a preference for responsible decision-making in program logistics.

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



Nearly half of all respondents (49%) agree that sustainability measures influence their perception of incentive travel programs. Environmental sustainability practices are top of mind for 62% of employees, highlighting the importance of eco-friendly initiatives. Furthermore, 35% emphasize sustainable travel plans, such as carbon offsetting, as key considerations when evaluating incentive travel opportunities.

Important Sustainability Measures



What sustainability measures are important to you in an incentive program?

Incorporating these practices into incentive programs not only aligns with broader societal trends but also strengthens the appeal of incentive programs. Companies that prioritize sustainability and ethical considerations are better positioned to develop long-standing travel rewards options that are held in high regard by their employees.

Summary and Primary Takeaways

The *2025 European Attendee Preferences for Incentive Travel* study offers valuable insights into how organizations can design more effective and motivating incentive travel programs, and partners can assist in fulfilling these awards. To do so, focus can be narrowed to the following:

- European and Asian Travel Destinations Reign Supreme:** European and Asian destinations continue to be top choices for incentive travel, with Western Europe, the Nordics, and Eastern Europe being particularly appealing. The proximity and cultural familiarity of Western Europe make it a strong contender, while the natural beauty and serene experiences of the Nordics attract significant interest. For international travel, destinations in East and South-east Asia offer a unique mix of cultural experiences and adventure.
- Ideal Destinations Include Beaches, Adventure, and Culture:** Incentive award program participants seek destinations that provide a balance of beach or sunny locations, adventure-based travel, and rich cultural experiences. Popular features include time spent on the beach, historical and cultural tours, and outdoor adventures like hiking or nature expeditions. Program designers should prioritize destinations that deliver on these three key elements to ensure a diverse and motivating experience for employees.

- **Local Experiences Matter:** Participants show a strong preference for destinations that offer immersive, authentic local experiences. This includes the opportunity to explore regional culture, cuisine, and historical landmarks, making the trip more enriching and memorable. The popularity of nearby European destinations also highlights a desire for travel experiences that feel culturally familiar and accessible, enhancing the overall appeal of the trip. Whether it's enjoying local tours, exploring hidden gems, or engaging in unique activities, these experiences resonate deeply and are key to making incentive travel both motivating and rewarding.
- **Offer Flexible Trip Durations:** The ideal duration for incentive trips generally falls between four and ten days. Shorter trips (four to six days) are preferred for European destinations, while international trips lean toward slightly longer stays (seven to ten). Program designers should offer flexibility in trip duration to meet the preferences of different employee demographics, especially balancing family needs and work schedules.
- **All-Inclusive, Hassle-Free Travel:** All-inclusive packages are highly motivating for employees, with cruises standing out as a popular choice. The convenience of a single bundled price for accommodations, meals, and activities ensures a seamless and stress-free experience. Program designers should prioritize all-inclusive options, including cruises, which offer a mix of luxury, comfort, and a variety of destinations in one trip.
- **North American Destinations Provide Some Uncertainty:** Responses reinforce the idea that European and nearby destinations provide overwhelming priority for European incentive travel award participants. This is largely driven by the appeal of local cultural experiences and the desire for shorter or moderate-length flights. However, among those who have previously traveled to North America for business or leisure, certain destinations received high recommendations for future incentive travel. While Europe remains the clear preference, this suggests that exposure and firsthand experience may play a role in shifting perceptions of long-haul destinations. For North American destinations to gain traction, programs may need to emphasize unique cultural offerings, ease of travel, and exclusive experiences that justify the longer journey.
- **Sustainability Matters:** Incentive award program participants are increasingly concerned with sustainability in incentive travel programs. Incorporating eco-friendly practices, such as sustainable travel options, carbon offsetting, and responsible sourcing, is becoming essential for companies aiming to stay competitive. Program designers should consider integrating these practices into their reward offerings, while suppliers should be prepared to promote their sustainability efforts to meet this growing demand.

Thank You to Our Research Advocacy Partner

