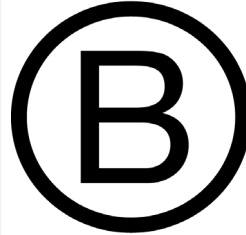




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THE TOP TEN TAKEAWAYS ON THE STATE OF SUSTAINABILITY IN EUROPEAN INCENTIVE PROGRAMS



Sustainability has become a pivotal topic in the context of modern incentive programs, reflecting a broader cultural shift towards more responsible and eco-friendly practices. As companies strive to reduce their environmental footprint, the incentives industry is also evolving to incorporate sustainability initiatives that align with these goals. This transformation is not only about meeting regulatory requirements but also about responding to the growing awareness among stakeholders about the environmental impact of their activities.

The emphasis on sustainability in incentive programs is influenced by various factors, including corporate social responsibility (CSR) policies, consumer expectations, and the need for long-term viability of business practices. Organizations are increasingly exploring ways to integrate sustainable measures into their incentive offerings, such as reducing travel emissions, minimizing waste, and choosing eco-friendly venues and suppliers. These efforts are often guided by formal certifications like B Corps, Green Key, and ISO standards, which provide frameworks for implementing and measuring sustainability initiatives.

Despite the growing focus on sustainability, there is still a notable gap between the expectations of attendees and the actions of program organizers. While many attendees appreciate sustainability efforts, they are not yet demanding comprehensive measures across all aspects of the programs. This highlights the need for continued education and awareness-building to bridge the gap between sustainability aspirations and attendee expectations. As the industry progresses, it will be crucial for agencies to take the lead in incorporating ESG practices into their operations, ensuring that sustainability becomes an integral part of the incentive landscape.

Sustainability is considered a short-run challenge by 19% of European respondents, while 33% consider it a long-run challenge -2024 Incentive Travel Index

The content below reflects the sentiments of event professionals from across Europe and the UK who took part in an IRF roundtable discussion in Lisbon and Sintra, Portugal. Their top ten observations and insights about the state of sustainability in incentives today are found below.

1. Attendees Appreciate Sustainability - But Aren't Demanding It

The discussion highlighted that the group's focus on sustainability was primarily driven by the agencies and not by attendees. For agencies and suppliers, there is some emphasis on formal certifications such as B Corps, Green Key, ISOS, and other certifications, emphasizing the importance of ensuring organizations are trained and able to help deliver sustainability goals in the short and long term. Attendees are not consistently demanding sustainability measures, and planners note that the luxury experience is considered more important than most sustainability elements. However, many attendees appreciate efforts related to reducing food waste, eliminating single use plastics, meaningful CSR, or other efforts that reduce footprint.

"It will take time for individuals to require or demand sustainability across the full program. They want turndown service daily, and many are still complaining about losing the small bath amenities." - Corporate Program Owner

49% of respondents indicated sustainability measures have a positive impact on the perception of incentive travel.
- 2025 European Attendee Preferences for Incentive Travel

2. ESG Goals and Event Management Teams are Disconnected

A significant insight was the disconnection between Environmental, Social, and Governance (ESG) goals and some corporate event management teams. It was noted that, as a result, agencies have an opportunity to take ownership of integrating ESG practices into their operations given that some corporate clients remain reluctant to measure their impact. Agencies can help further actions toward sustainability goals now, especially as some clients are waiting for government mandates fully engaging in ESG measures.

"Few corporate program owners are interested in leading in this area. They will wait until it's required by governance."
- Corporate Program Owner

Under European Climate Law, there is an intermediate target of reducing net greenhouse gas emissions at least 55% by 2030 compared to 1990 levels.

3. Sustainability Requirements Vary Across Different Countries

The group discussed the varying sustainability requirements across different countries. For instance, Germany requires reports before cruises can send RFPs and imposes high fines for non-compliance to carbon goals or other sustainability goals. Other countries do not yet have such strong measurements in place and therefore are not requiring measurement or other actions at this time. Hotels and cruise lines, however, continue to feel pressure in delivering on sustainability, and indicated an increase in requests for sustainability assessments and data.

“Programs from German organizations tend to be the most demanding. They require certifications like Green Key and ISOS to even consider a property.” - Hotel Representative

4. Carbon Footprint is a Concern in Airfare and Travel, But Not a Deciding Factor

There is significant awareness of the carbon footprint associated with travel; however, it is not yet driving destination decisions. In some companies, there is a goal to balance air and train travel by 2026, while in others, there is no restriction related to long-haul travel by plane. Restrictions and change will come with the implementation of carbon budgets as companies work to achieve carbon neutrality in accordance with their country goals. Canada’s approach to offset the impact of carbon emissions for programs held there was noted as a benefit for organizations with carbon goals.

“Agencies can play a big role in helping to ensure destination selection is informed by carbon footprint. The reports are there, and we can do analysis beforehand that is presented with the destination options.” - Third Party Agency

According to SITA’s 2024 Report, 50% of passengers are aware of the option to purchase carbon offsets, but only around 15% do. The majority of those purchasing offsets are 18 – 35-year-olds.

5. Sustainability is Given Higher Weight in RFPs, But Cost is Still the Primary Driver

It seems that across Europe and the UK, sustainability is being given a higher weight in decision-making for RFPs and procurement, however, it is still not the deciding factor. Cost continues to be the primary driver for incentive program decisions. The importance of sustainability can vary depending on corporate goals and values, and the personal values of the final decision maker. Suppliers need to be prepared to deliver a sustainability story in RFPs, however it will not be a final decision driver for the majority.

“Demonstrating how to be sustainable and incorporating those elements into RFPs can be a point of differentiation for agencies. Ultimately, you can scale up or down what is actually executed, but it’s important to show the capability.” - Third Party Agency

6. Impact of Social Sustainability is a Priority

The group emphasized the importance of measuring the impact on people and communities as part of early sustainability efforts. Measuring the total value of goods donated, total number of people impacted by donations, or measuring spending with diverse suppliers were all suggested strategies. While some of these are not hard dollar measures, it begins to tell the story of the impact of incorporating local givebacks. Others focused on pulling from the skills within the group to impact locals such as having a football coach work with local children for an afternoon.

“One of the ways we’re measuring impact is by looking at the number of suppliers we work with in our indigenous communities and the dollars spent with those suppliers. These suppliers help deliver on the authenticity that attendees are seeking, and we are helping to support these important communities.” - Destination Representative

7. Intentional Onsite Gifting is Focuses on Local, Useful, and Sustainable Products

It was noted that throughout Europe, program owners are being more thoughtful about onsite gifting. There is a trend towards reducing branded merchandise and increasing the use of local, cultural, and high-end items that are more likely to be kept and used by attendees. Gifts such as food that can be used and consumed during the program are also increasing in use. Sourcing gifts locally supports the local economy and gives attendees unique products tied to the destination. Regulations in different countries continue to affect gifting practices, with concerns about tax regulations leading the conversation.

“We’re leaning toward fewer gifts, but higher value and useful. Sourcing those items locally is also on the upswing.” - Third Party Agency

Average annual per person spends from €201 to €1,000 accounts for 68% of total spending, up from 52% in 2023. The share of annual spend on event gifts €100 and less has dropped significantly, now at 6% compared to 20% just a year ago. - Industry Outlook for 2025: Merchandise, Gift Cards and Event Gifting

8. Properties and Hotels are Expected to Lead in Sustainability

Across the group, the perception remains that the primary responsibility for sustainability in incentive programs currently sits with the host hotel or cruise line. There is opportunity for properties and hotels to adopt cutting-edge sustainability practices such as use of renewable fuels, enhanced reduced waste cooking, and local donation programs for surplus food. Planners expect hotels to have documented sustainability practices that they can quickly access and easily include in proposals and presentations. This presents a chance for properties to differentiate themselves by leading in sustainability initiatives.

“Hotels feel they bear the burden of sustainability and must take the lead. The expectation is that we will have a large part in the delivering on the carbon and waste reduction now even before goals and measures are in place.” - Hotel Representative

As of 2025, more than 7,500 hotels and other establishments in over 80 countries hold Green Key certification.

9. A Narrative Shift is Needed for Sustainability Implementation

Ideally, sustainability should be integrated into everyday practices and not just seen as a response to external pressures. This shift can help drive long-term value for businesses and better prepare them for coming regulations. By making sustainability a way of living, companies can enhance their brand image and attract more business opportunities. The focus should be on data-driven approaches, particularly in food and beverage (F&B) teams, to demonstrate the tangible benefits of sustainable practices.

“We have a large, data-driven Food & Beverage team. They can be part of the team onsite, helping to reduce waste during the program. We often position it as cost savings, but it is also a big sustainability resource.” - Third Party Agency

10. “Responsible Tourism” Can Enhance Attendee Experience

The discussion also highlights the importance of understanding cultural and economic drivers when implementing sustainability initiatives in an era of high sensitivity to over tourism and the negative impacts of irresponsible tourism. For example, avoiding high tourism areas opting for secondary destinations, and engaging with local communities can resonate more with attendees and create a positive impact. The concept of “destination within the destination” encourages participants to connect more with local residents, fostering a sense of community and cultural exchange. This approach not only supports local economies but also enhances the overall experience for attendees.

“In our Instagram age, we have a higher expectation of what we will see and experience. Most attendees want to have authentic experiences and real interactions. A well-planned program can facilitate that, living into sustainability goals and delivering on attendee expectations.” - Corporate Program Owner

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