Incentive Research Foundation

Industry Outlook for 2026:

Trends in Merchandise, Gift Cards, and Event Gifting

November 2025

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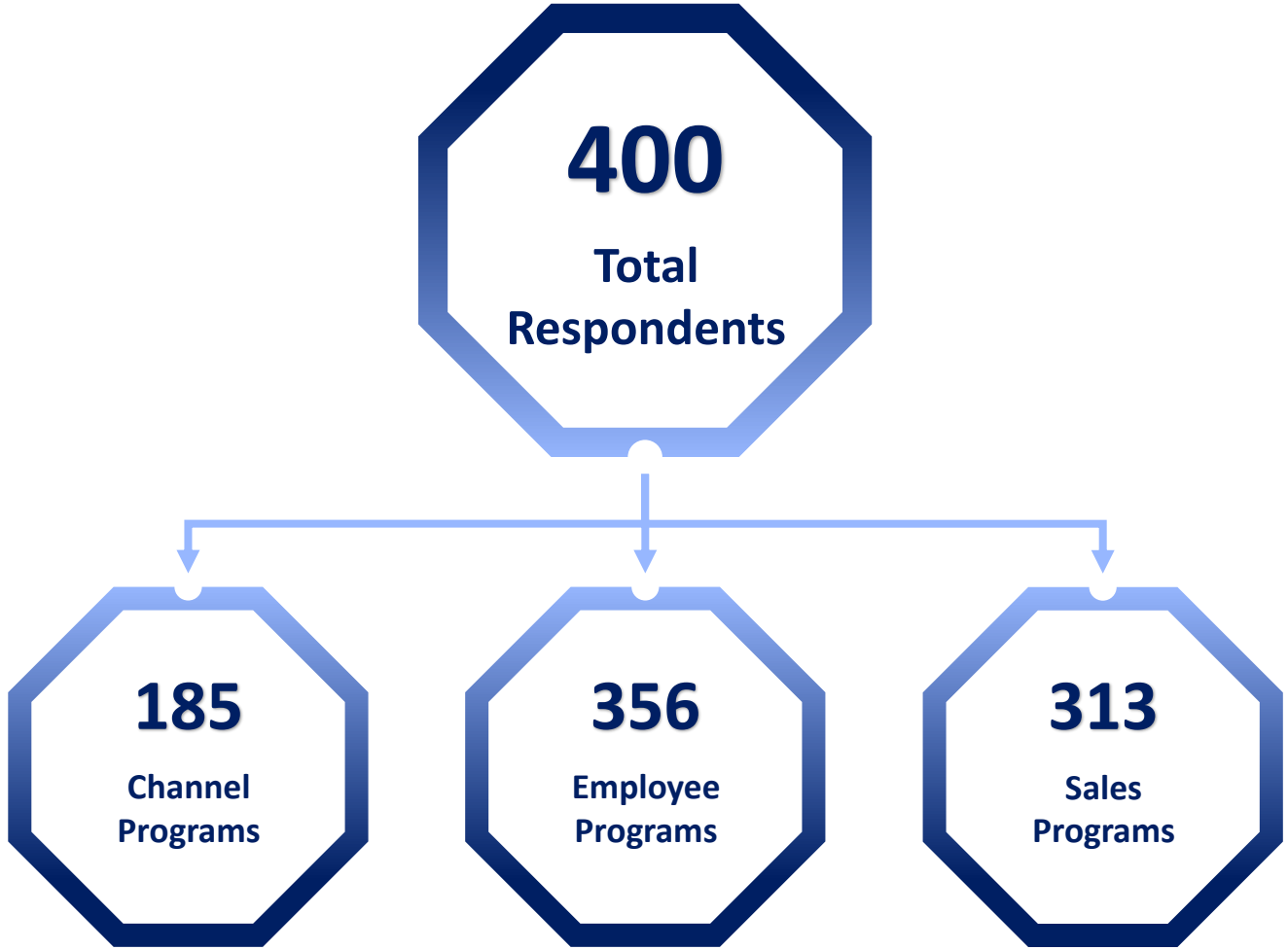
Research Overview

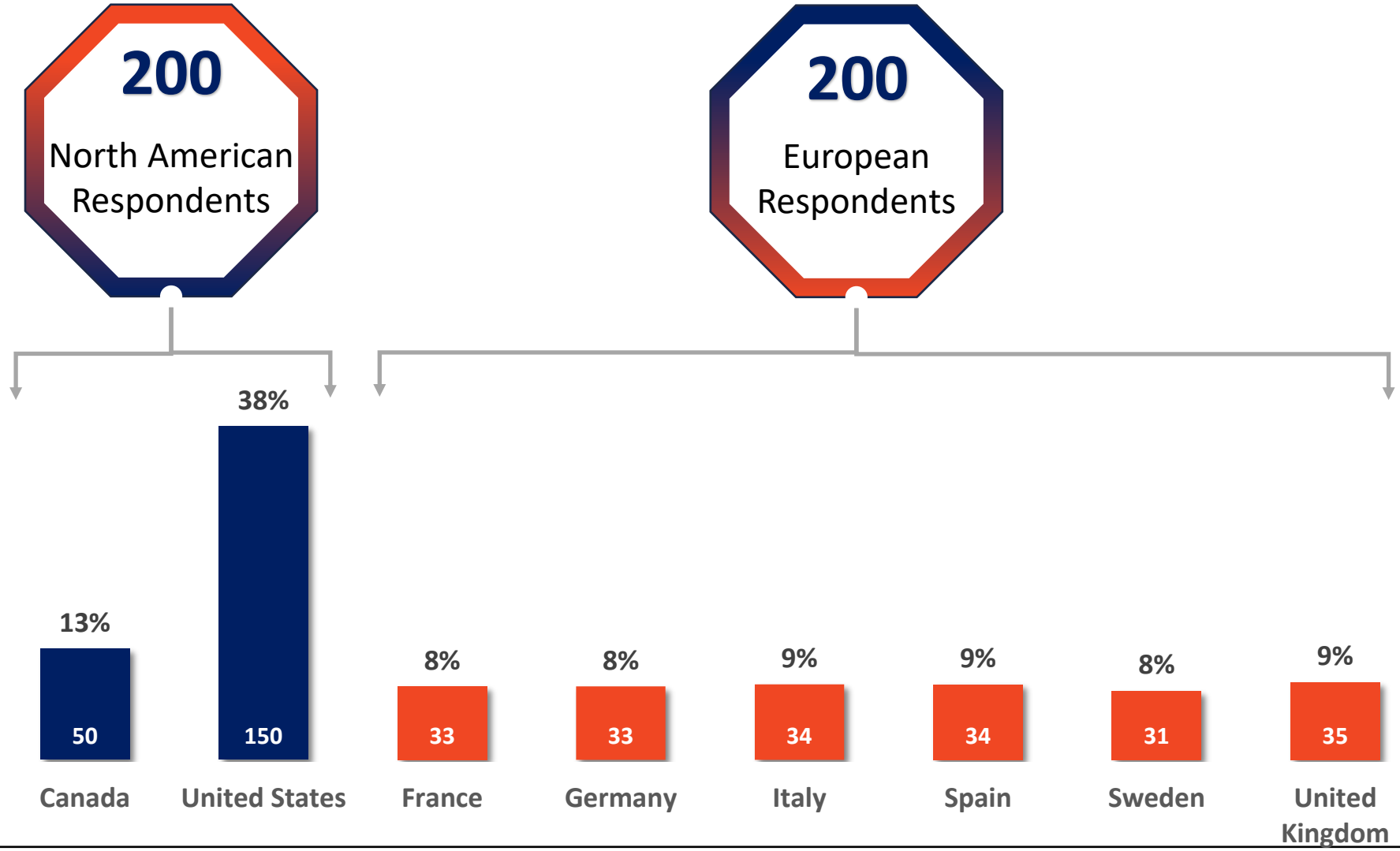
During August and September 2025, the Incentive Research Foundation (IRF) conducted the 2026 Industry Outlook survey, an annual tracking study that offers key insights into current trends, challenges, and opportunities within the incentive and recognition industry.

Respondents meet the following criteria:

- Full-time employee
- Industry professionals who provide or manage gift card and/or merchandise incentive programs
- Have comprehensive knowledge of non-cash incentive programs, including spend-related details



Respondent Profile



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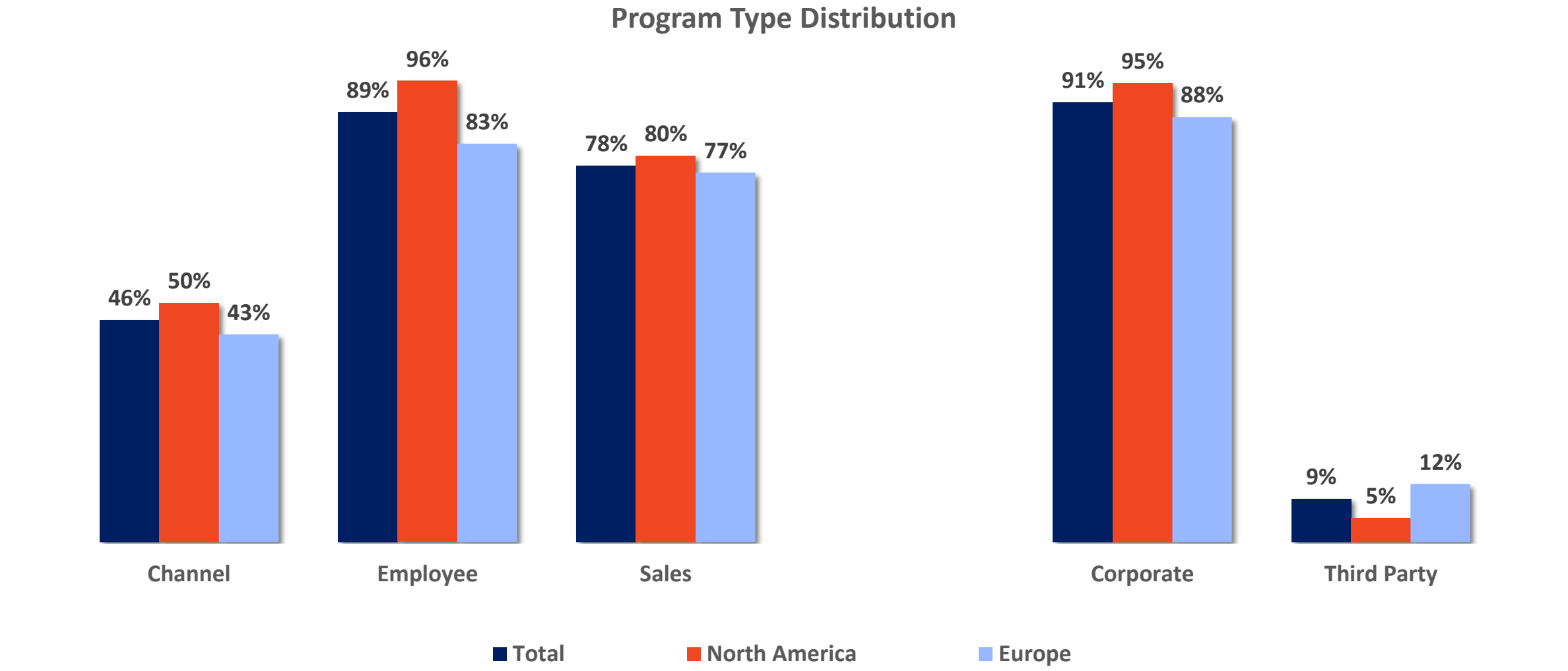
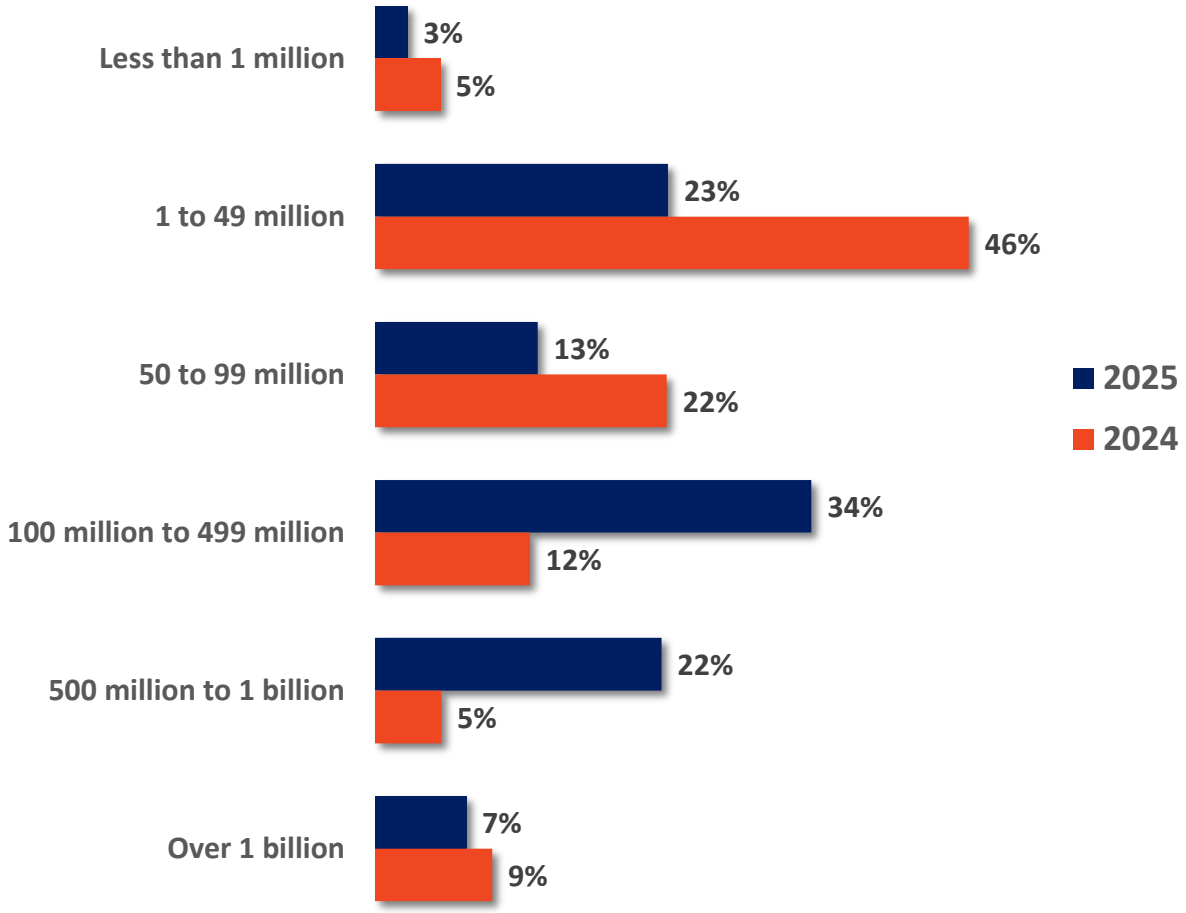
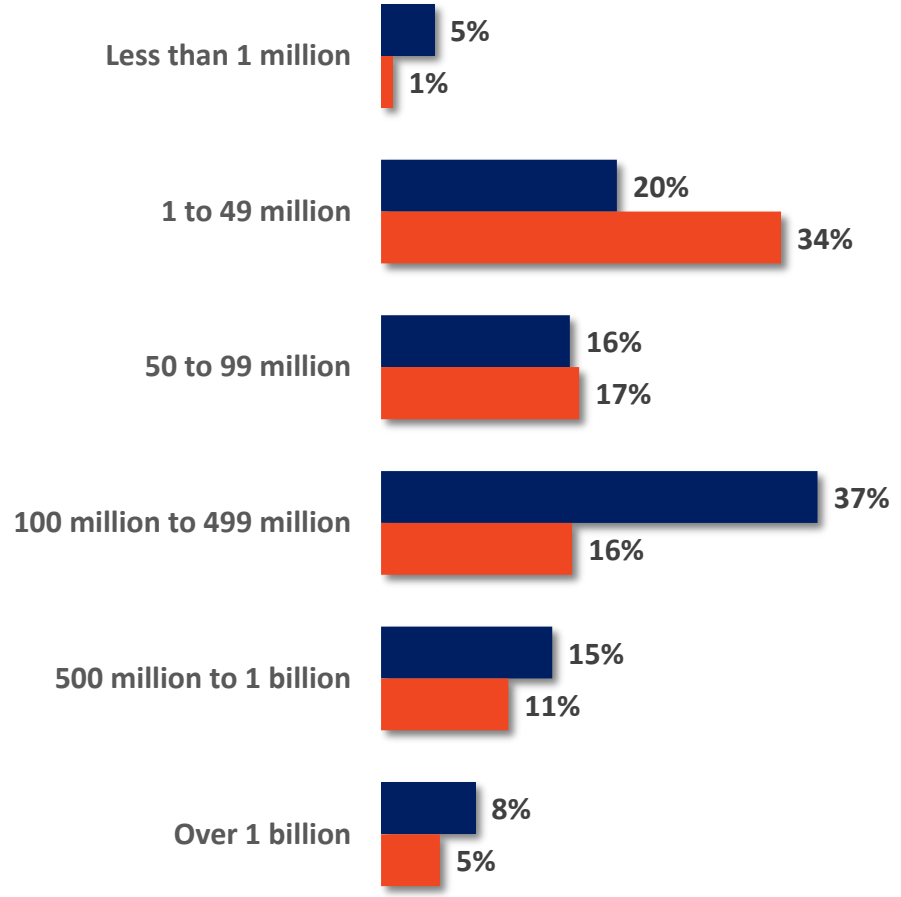


Respondent Profile

North American Revenue Distribution

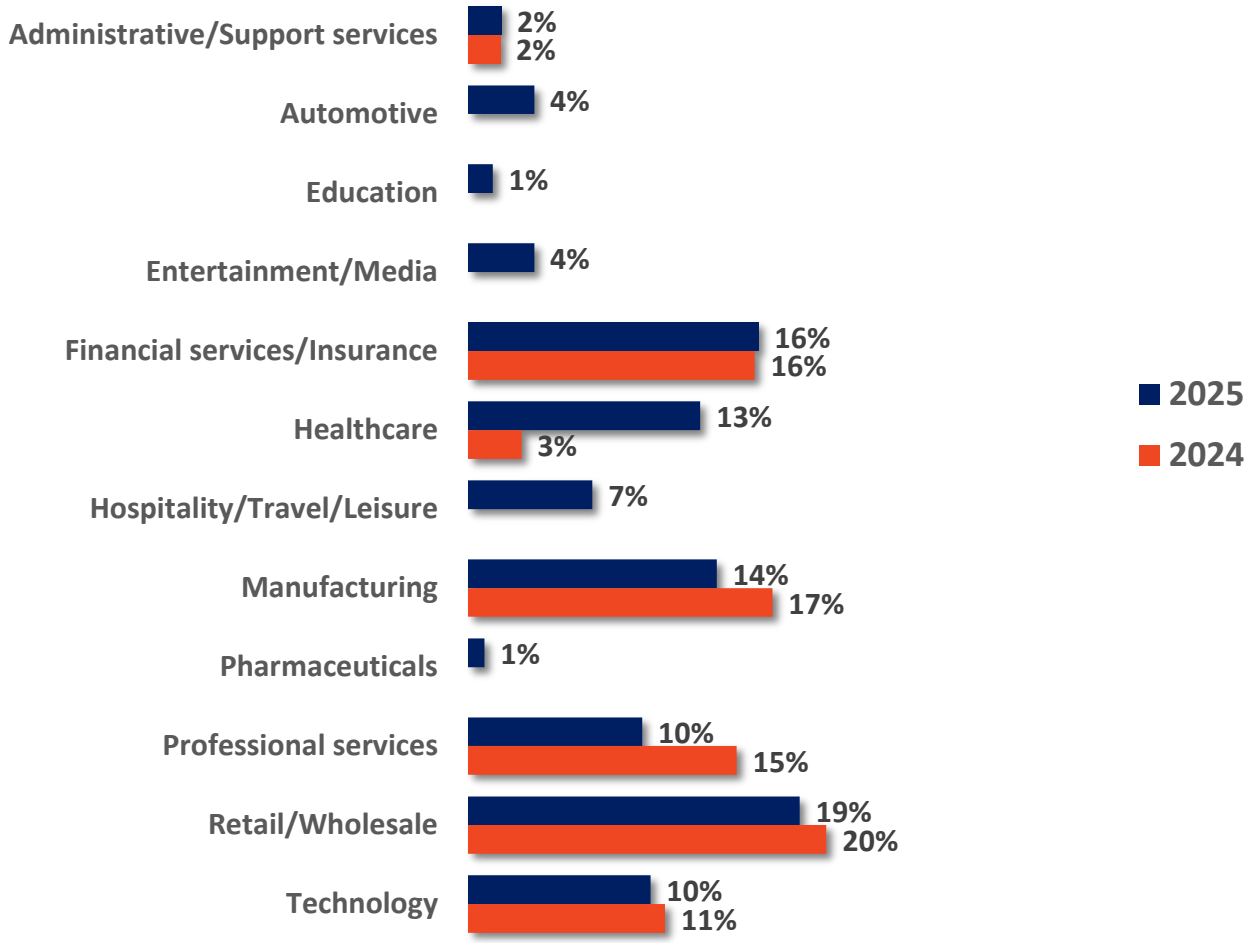


European Revenue Distribution

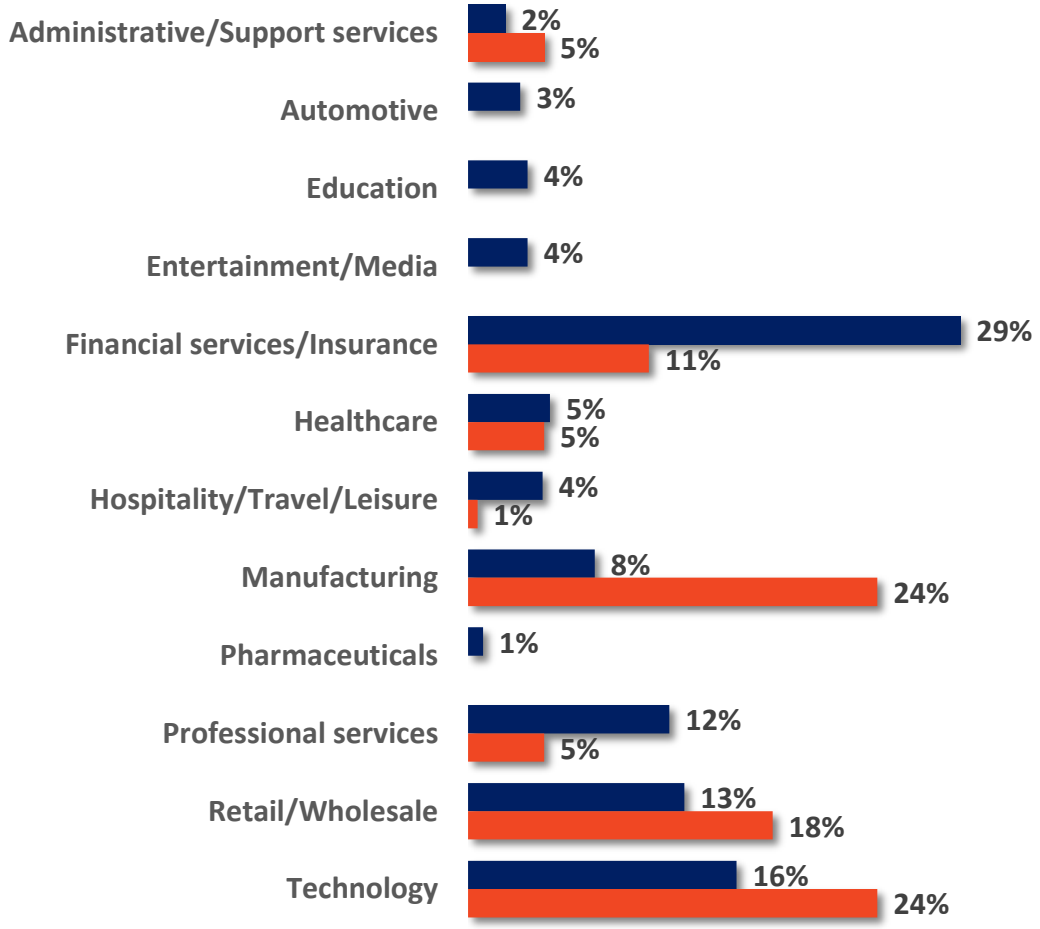


Respondent Profile

North American Industry Distribution



European Industry Distribution



Methodology Considerations

The 2026 Industry Outlook sample reflects shifts in industry distribution, with greater representation from higher-revenue organizations and a lower proportion of third-party providers compared with previous years. While these revenue differences resulted in modestly higher reported financial figures, analyses within specific segments indicate that these profile changes have minimal impact on overall results. Collective trends remain consistent and broadly applicable, though caution is applied where third-party results differ significantly from prior years due to the smaller sample size. Further statistical details are available upon request.

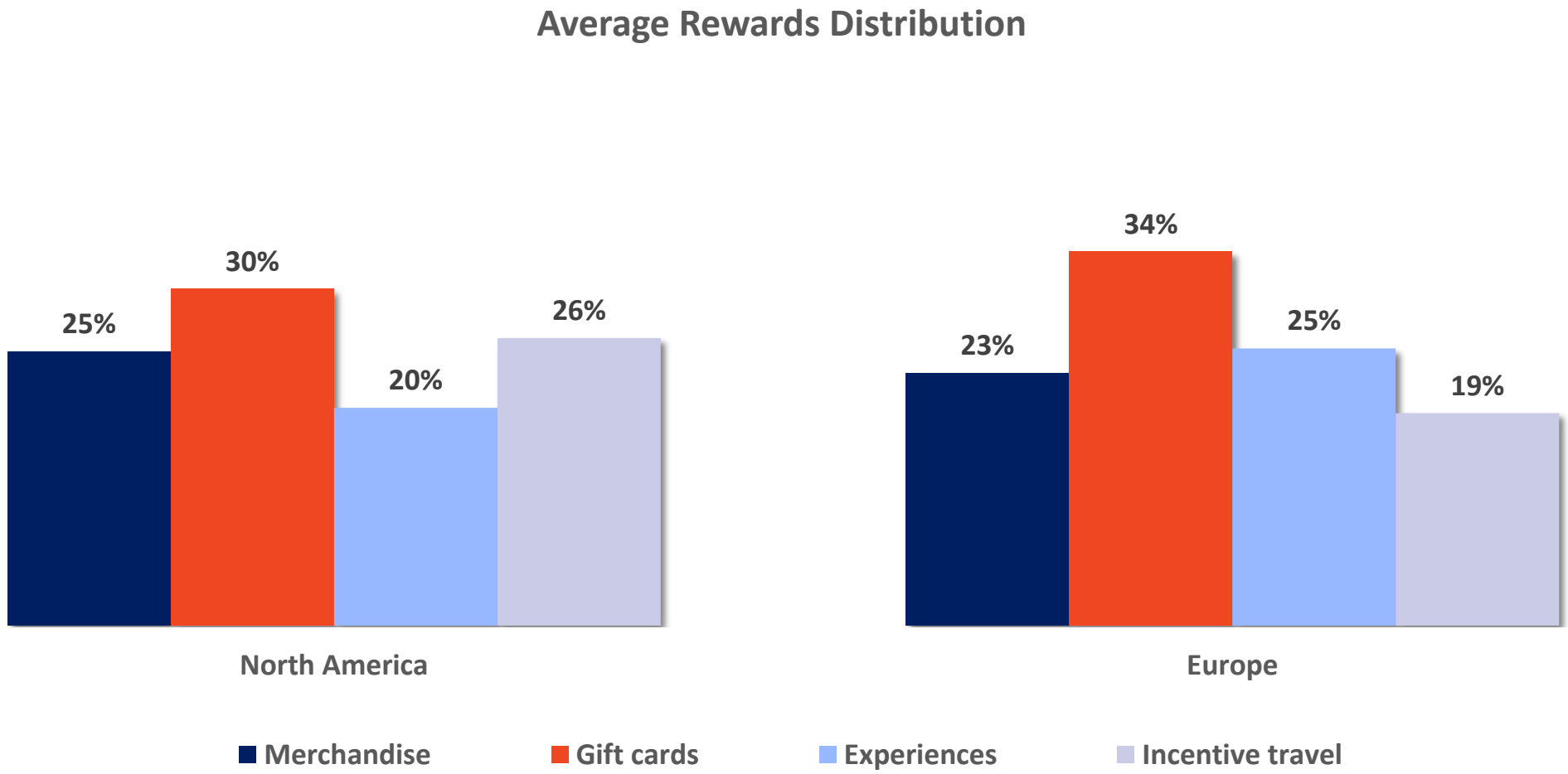
As in previous years, no weighting has been applied to the data to account for variances in response counts across stakeholder groups. The totals reported represent the base across all survey respondents.

North American and European results are presented separately.

General Program Trends

Rewards Allocation

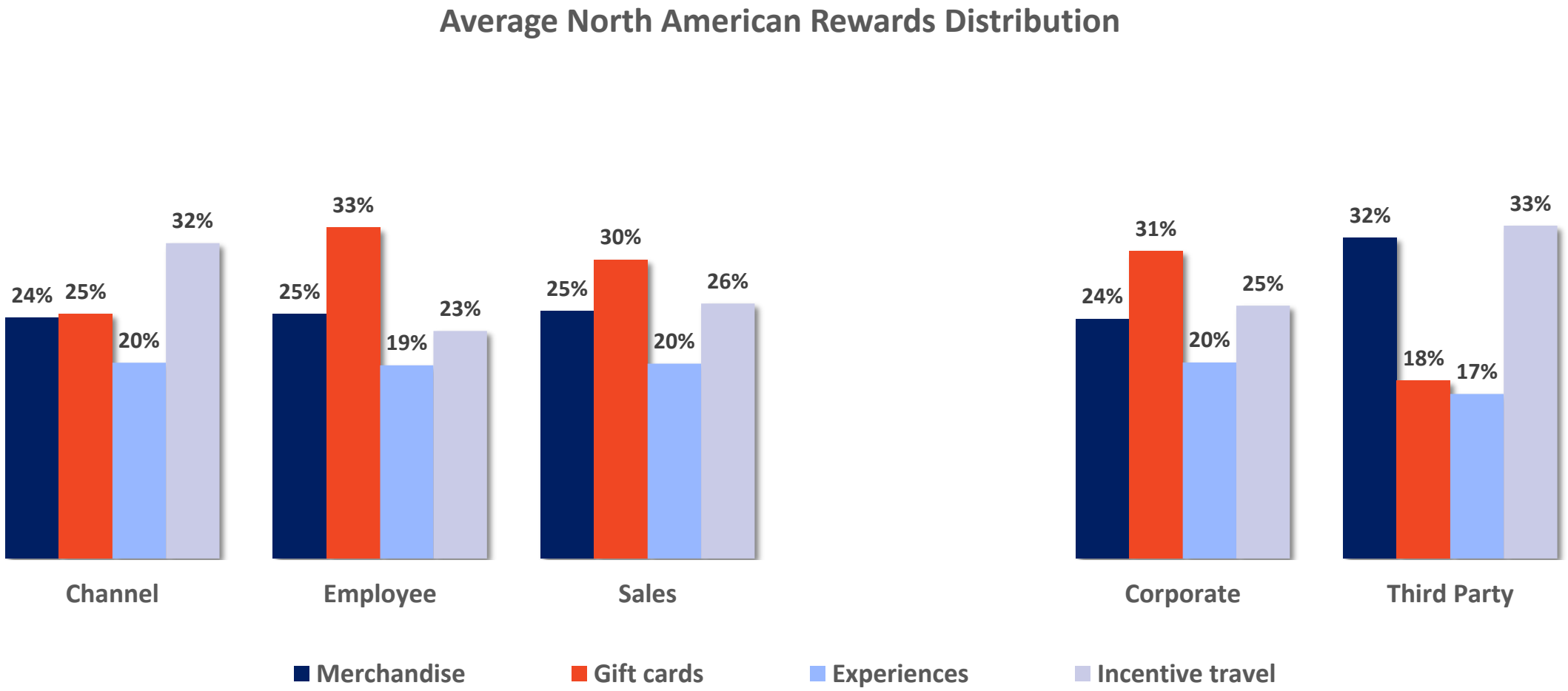
Gift card rewards lead



Q17: What percentage of your [channel/employee/sales] reward programs is contributed to each of the following categories?

Rewards Allocation

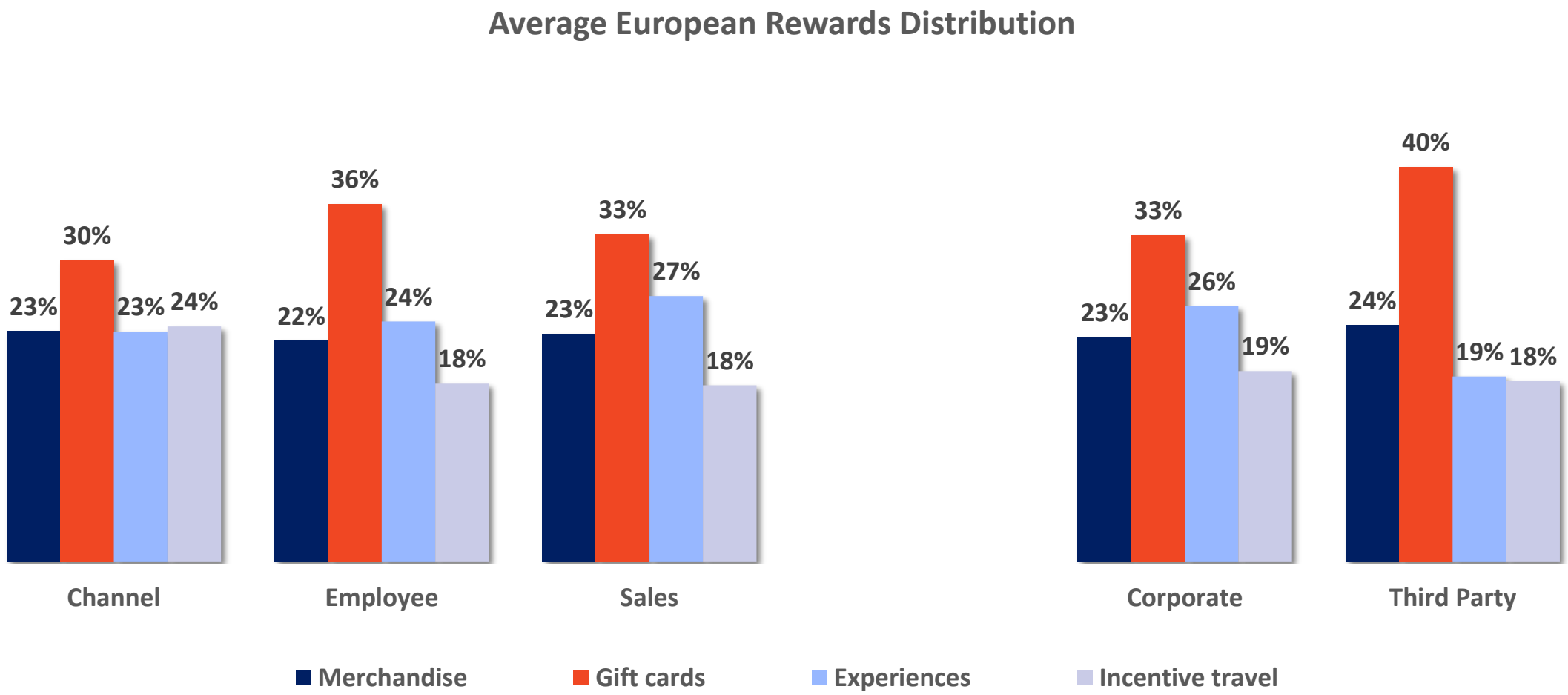
North American third parties emphasize merchandise and incentive travel



Q17: What percentage of your [channel/employee/sales] reward programs is contributed to each of the following categories?

Rewards Allocation

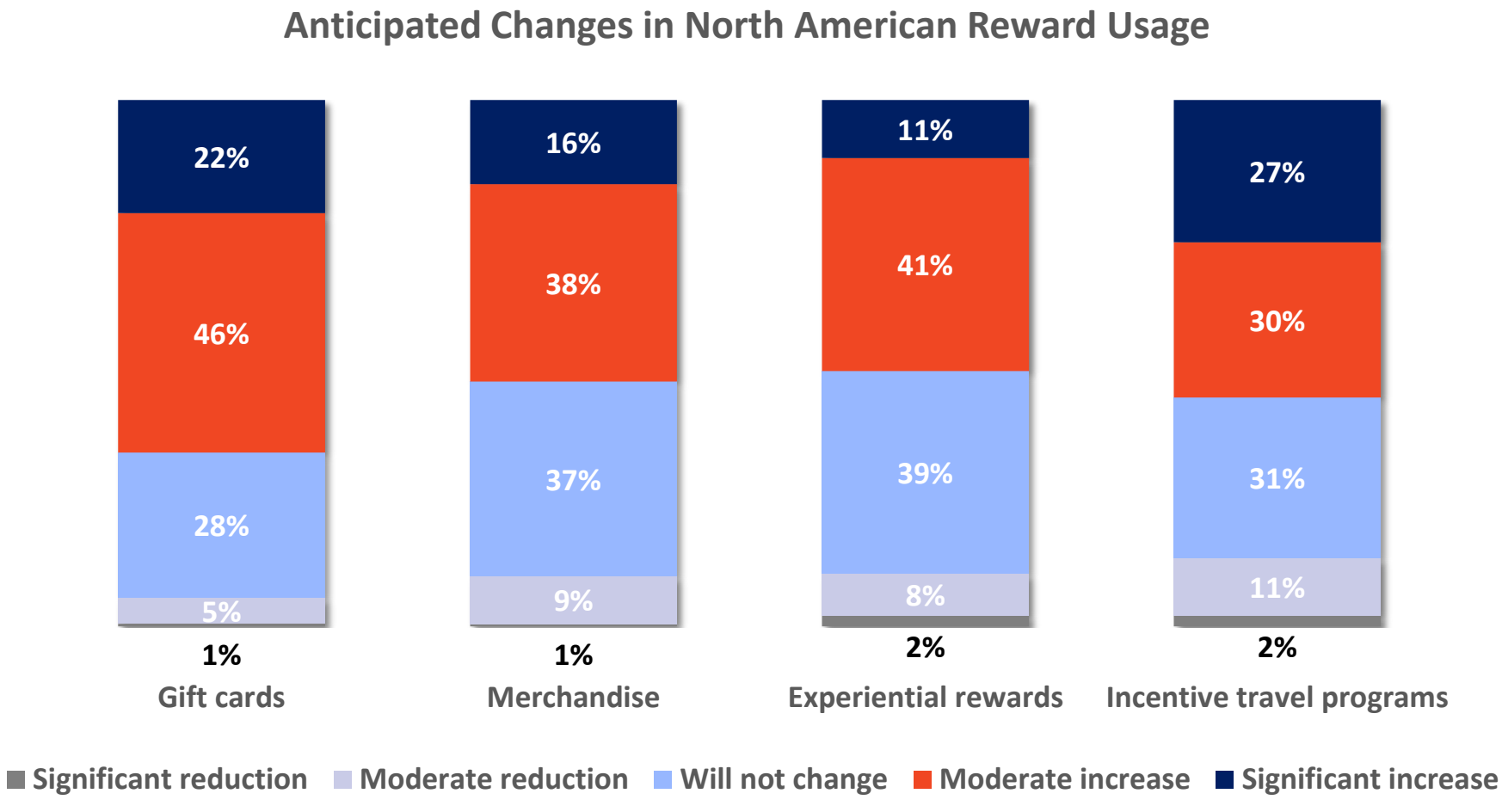
All European programs highlight gift cards as the leader in reward types



Q17: What percentage of your [channel/employee/sales] reward programs is contributed to each of the following categories?

Anticipated Shifts in Reward Types

Gift card usage is expected to grow most rapidly in North America



Nearly 70% of North American organizations expect growth in gift card usage

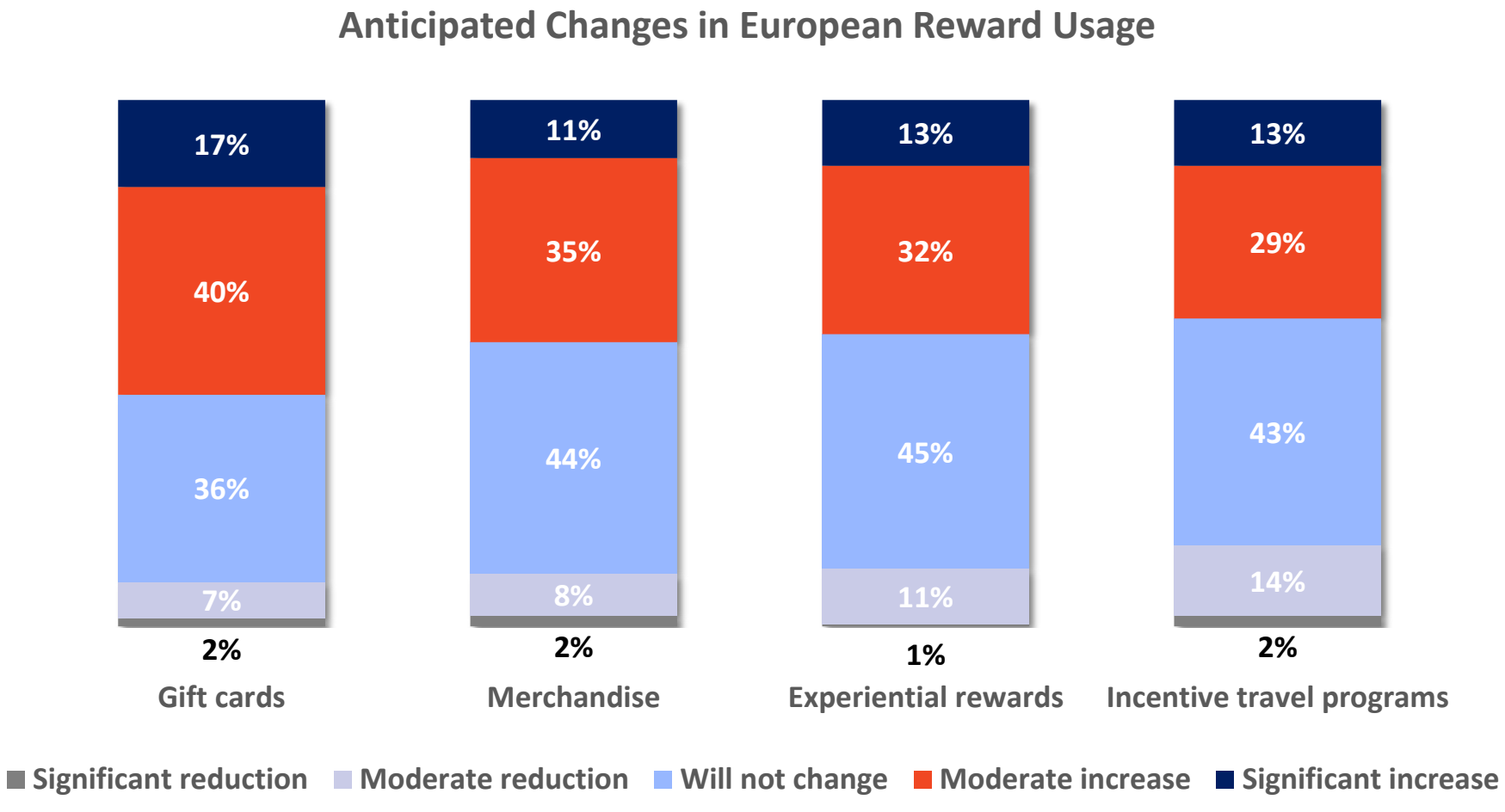
Over half of North American programs expect to increase merchandise and experiential rewards

Though fewer than half of companies expect to increase incentive travel use, though 27% anticipate a significant rise in this reward type

Q19: In the coming year, do you generally anticipate use of the following reward types will increase, decrease, or remain unchanged?

Anticipated Shifts in Reward Types

Gift cards also lead expected reward growth across Europe



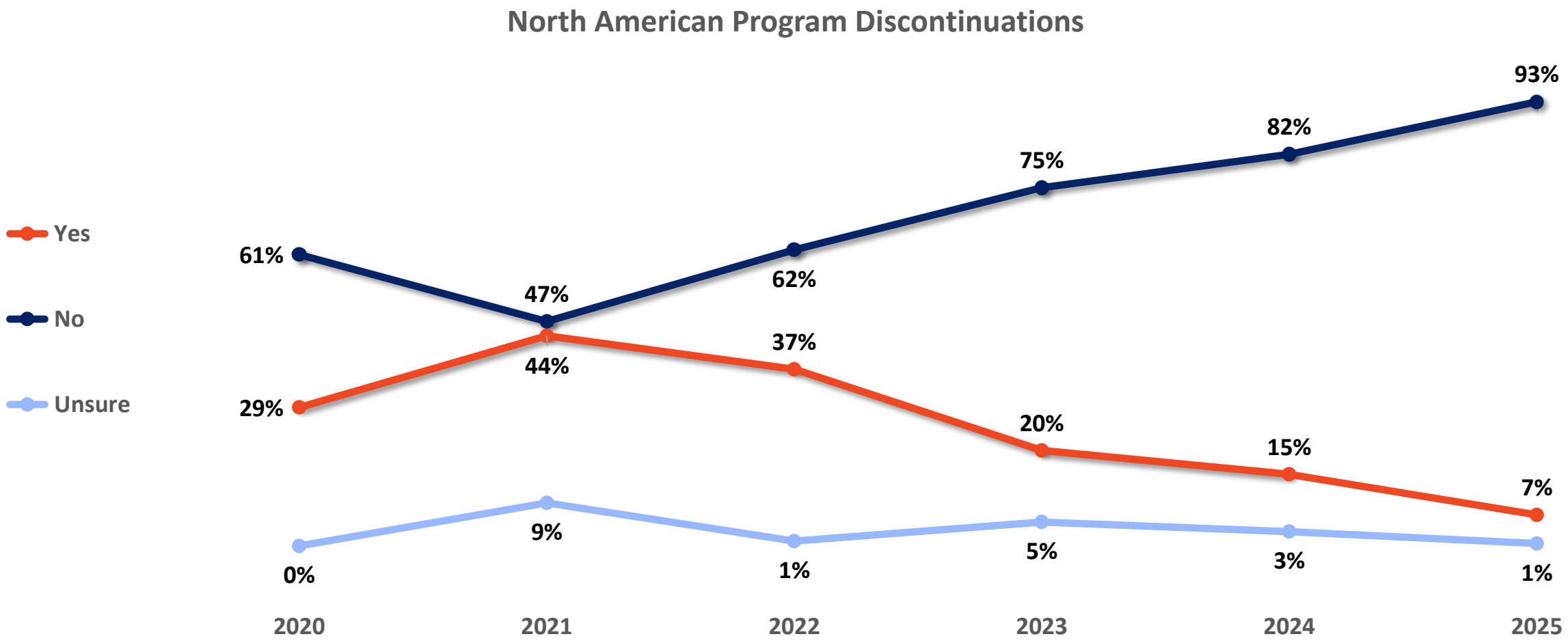
Nearly 60% of European organizations expect moderate or significant increases in gift card use

Merchandise, experiential, and incentive travel rewards are expected to increase at similar rates in Europe

Q19: In the coming year, do you generally anticipate use of the following reward types will increase, decrease, or remain unchanged?

Merchandise/Gift Card Program Retention

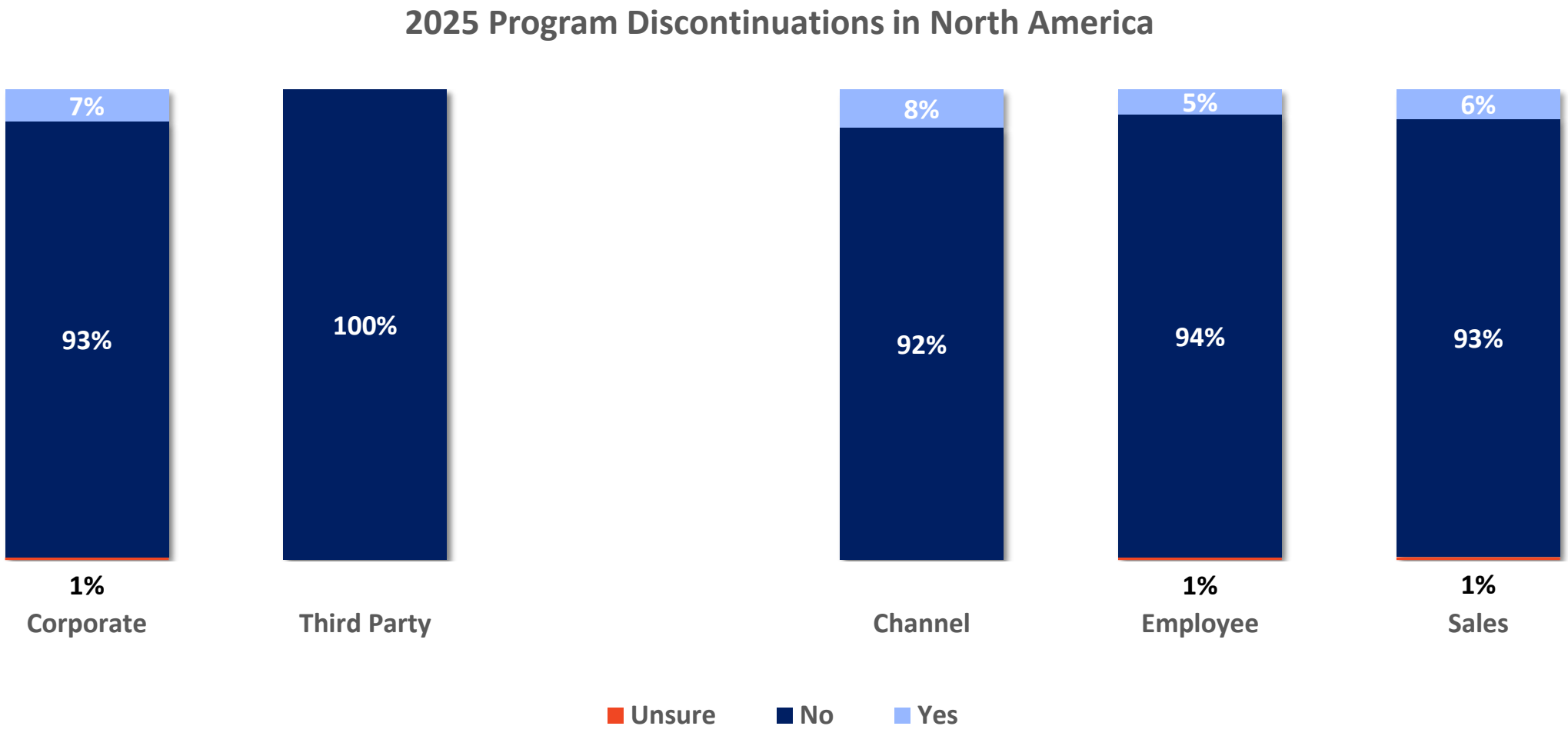
Merchandise and gift card program retention is at an all-time high in North America



Q20: In the past year, have you discontinued any merchandise or gift card program(s)?

Merchandise/Gift Card Program Retention

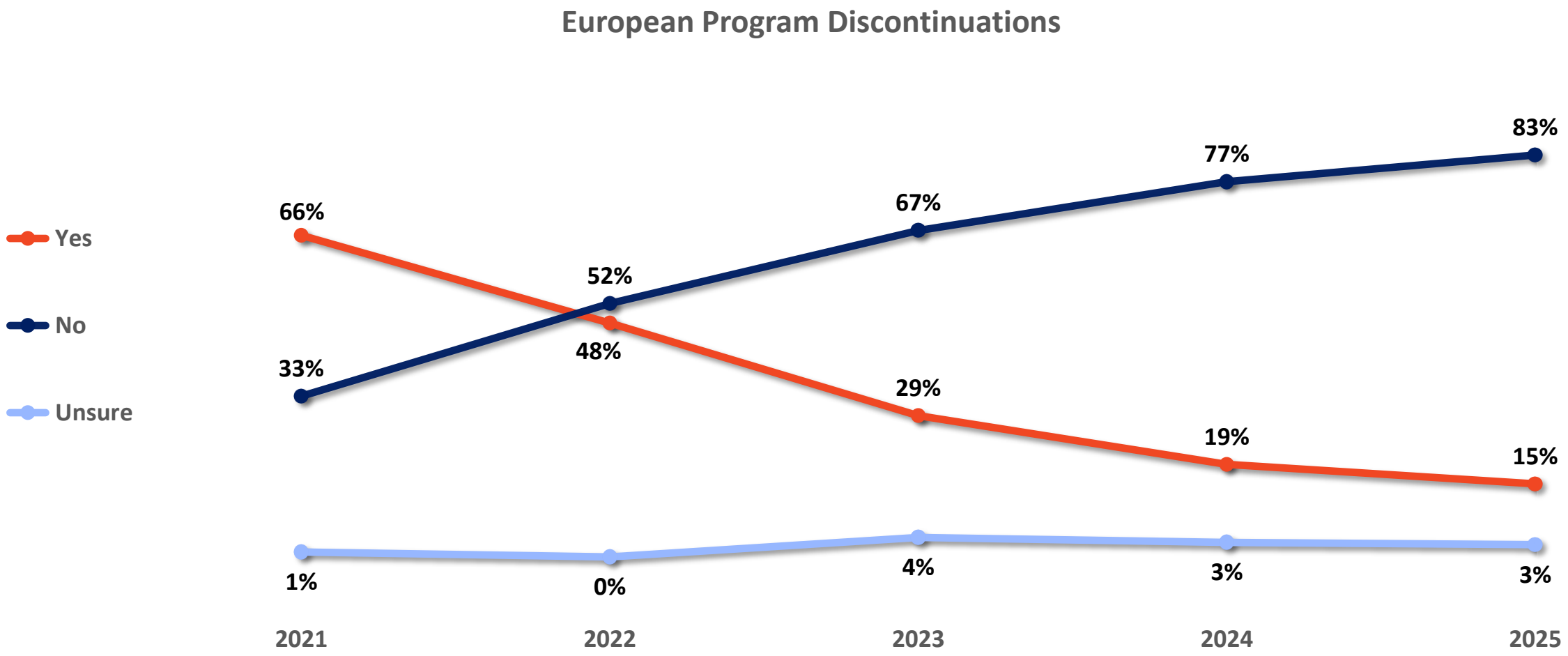
Merchandise and gift card program retention is high across all categories in North America



Q20: In the past year, have you discontinued any merchandise or gift card program(s)?

Merchandise/Gift Card Program Retention

European merchandise and gift card reward retention is also at an all-time high



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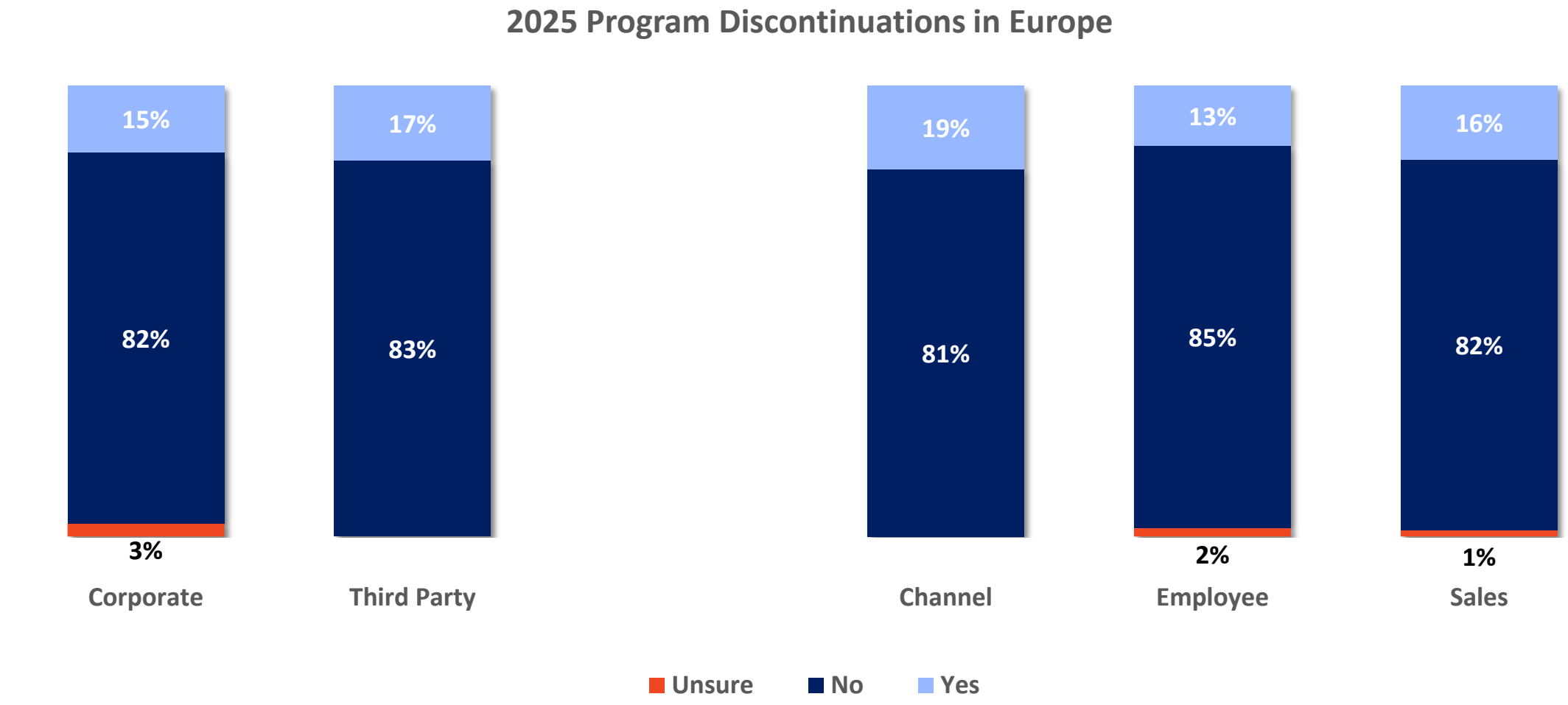
Merchandise/Gift Card Program Retention

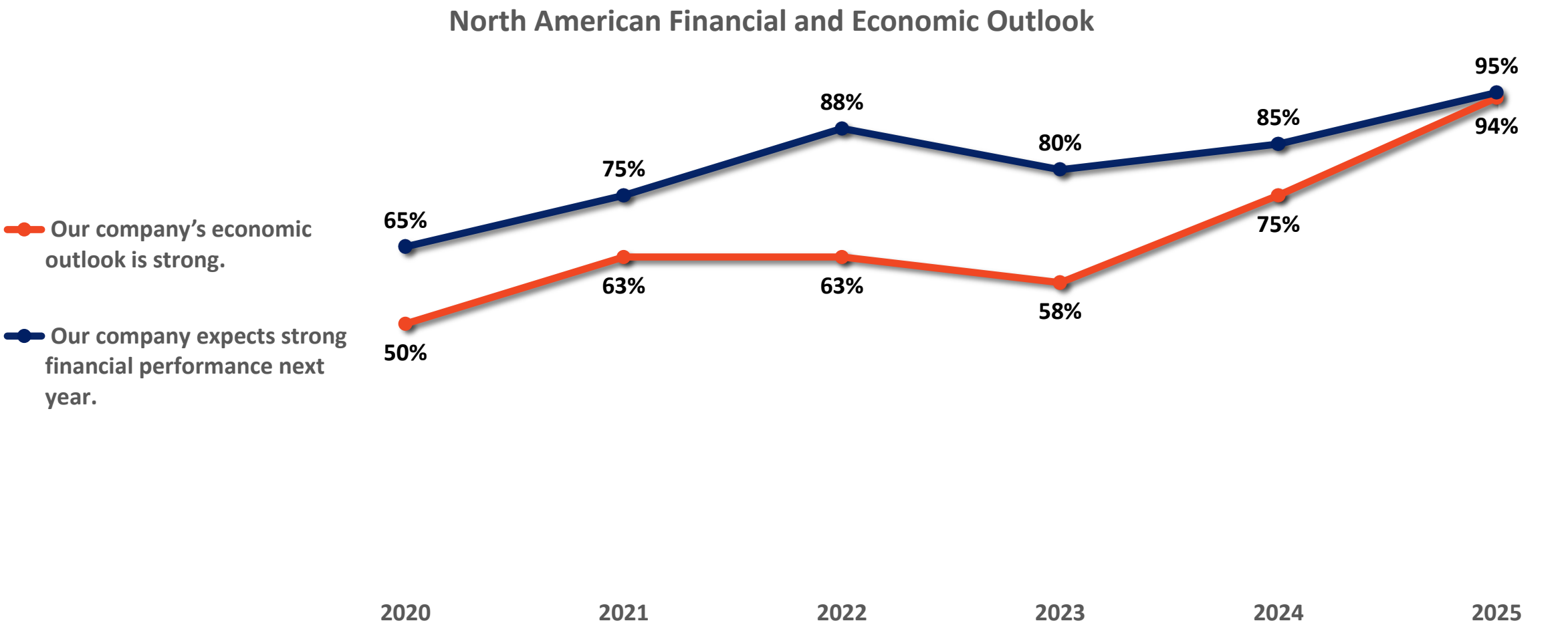
Merchandise and gift card program retention is similar all categories in Europe



Q20: In the past year, have you discontinued any merchandise or gift card program(s)?

General Financial Outlook

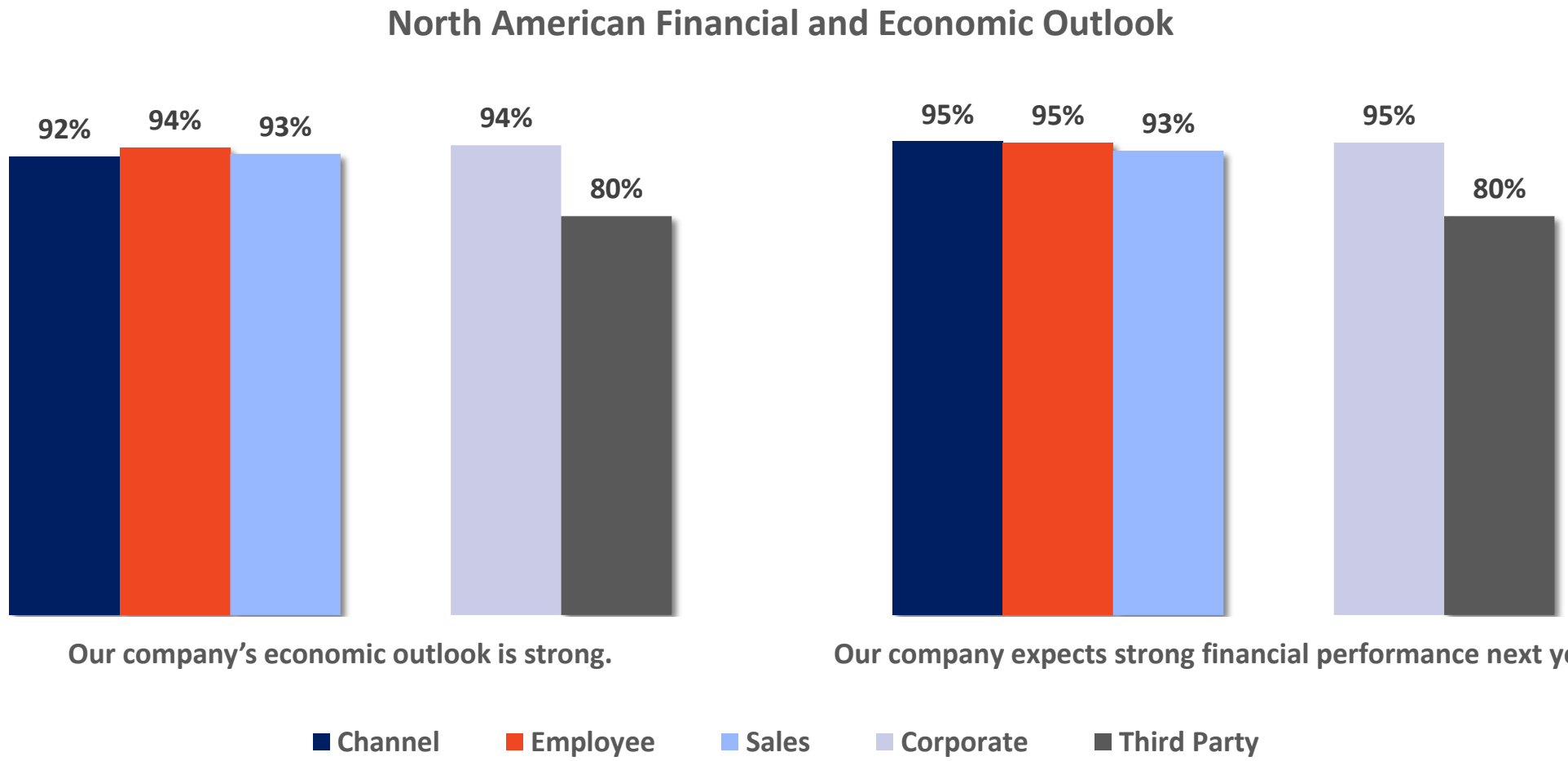
Economic and financial optimism in North America has reached new highs



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

General Financial Outlook

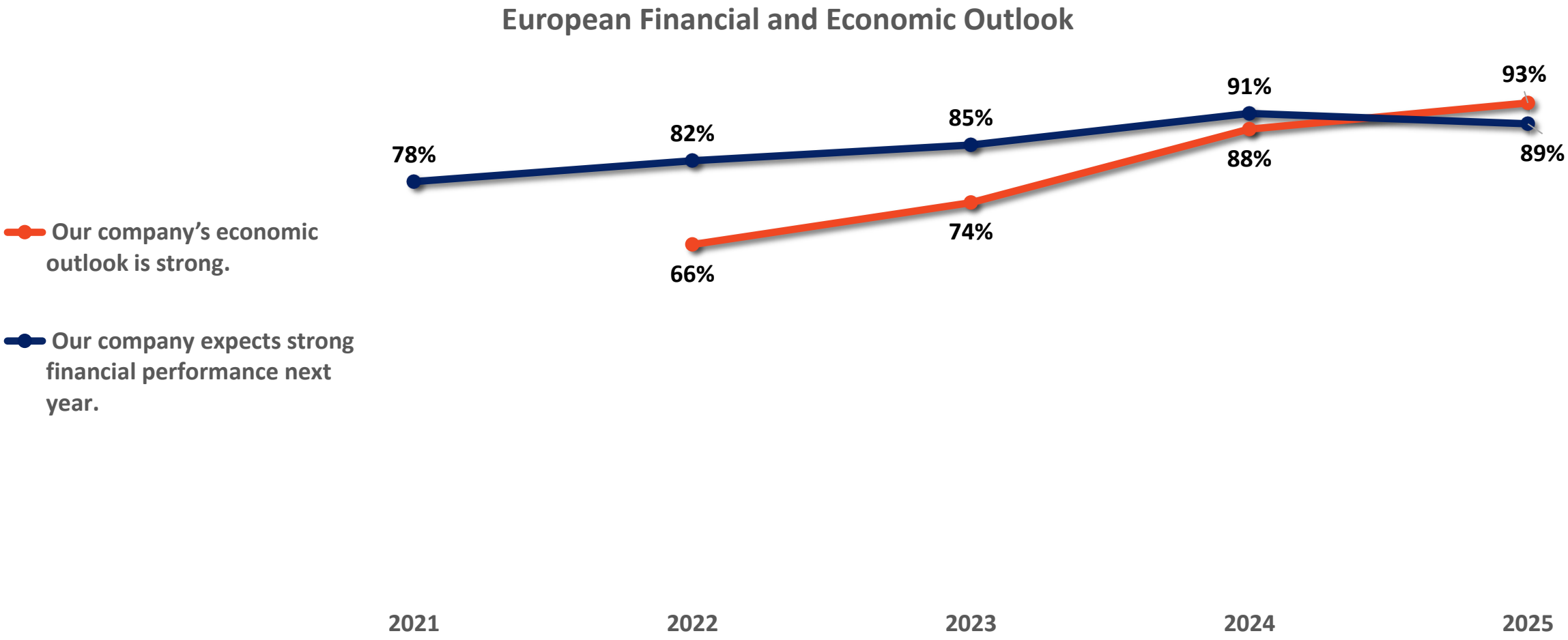
North American corporations have a stronger financial and economic outlook than third-parties



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

General Financial Outlook

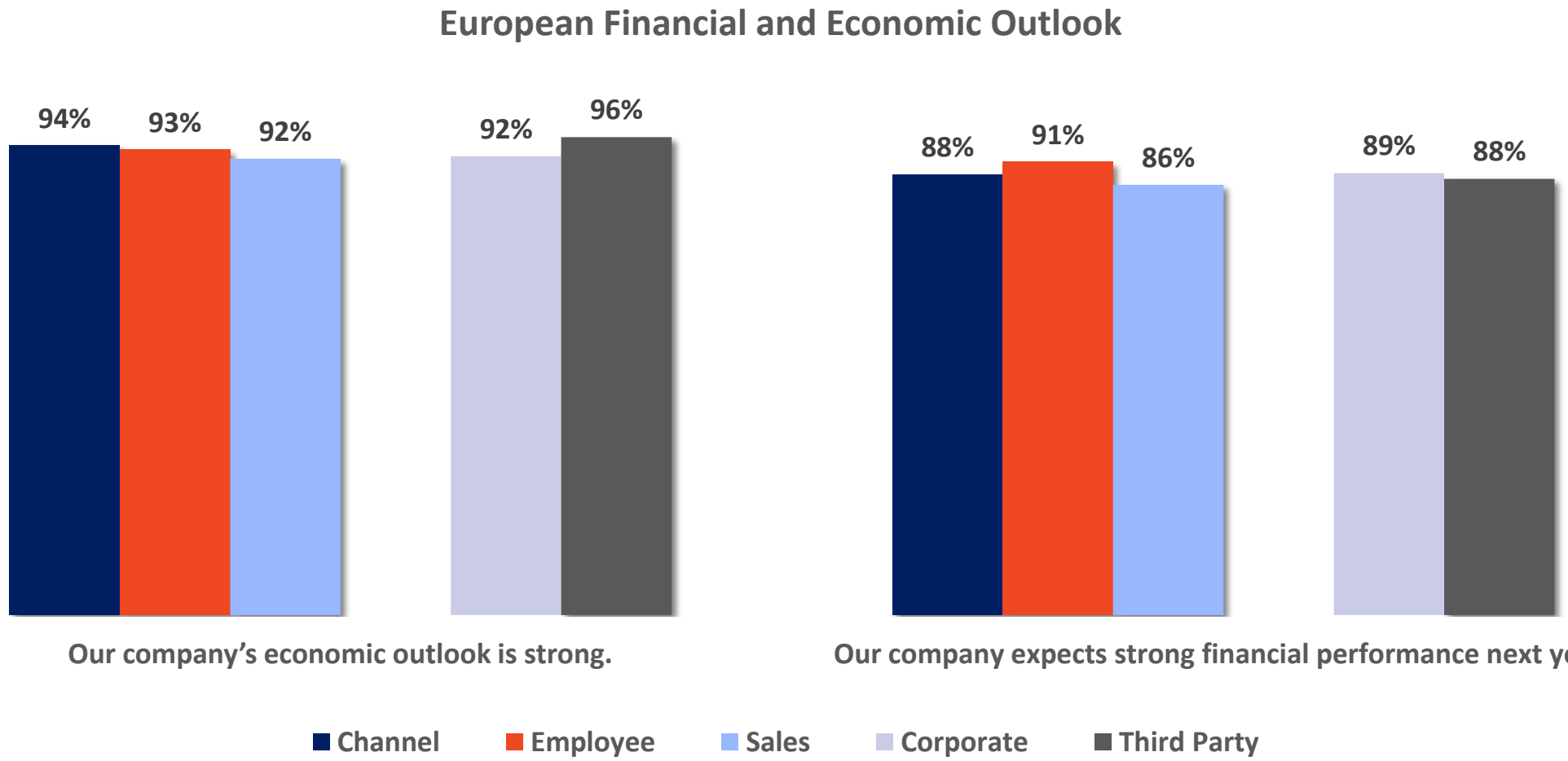
Economic confidence rises in Europe, with financial performance expectations remaining high



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

General Financial Outlook

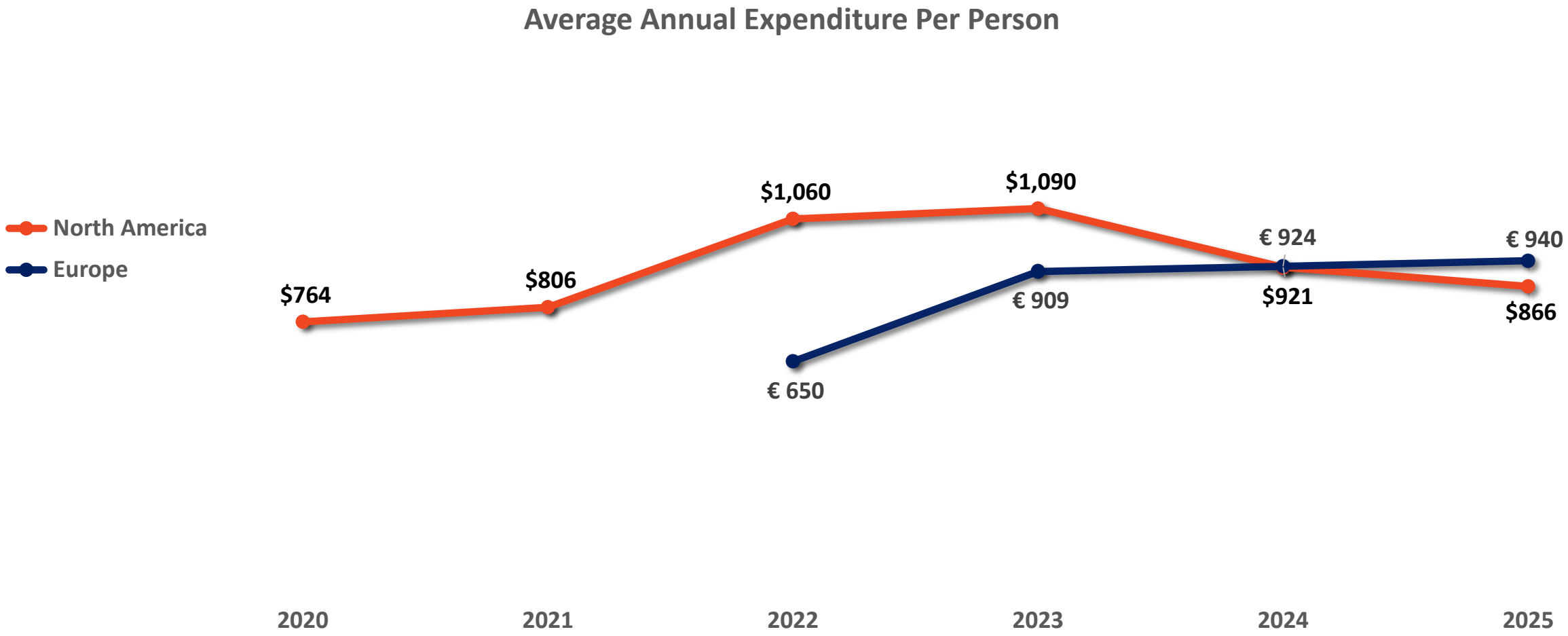
Financial and economic outlook is relatively consistent across all subgroups in Europe



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

Non-Cash Rewards & Recognition Spending

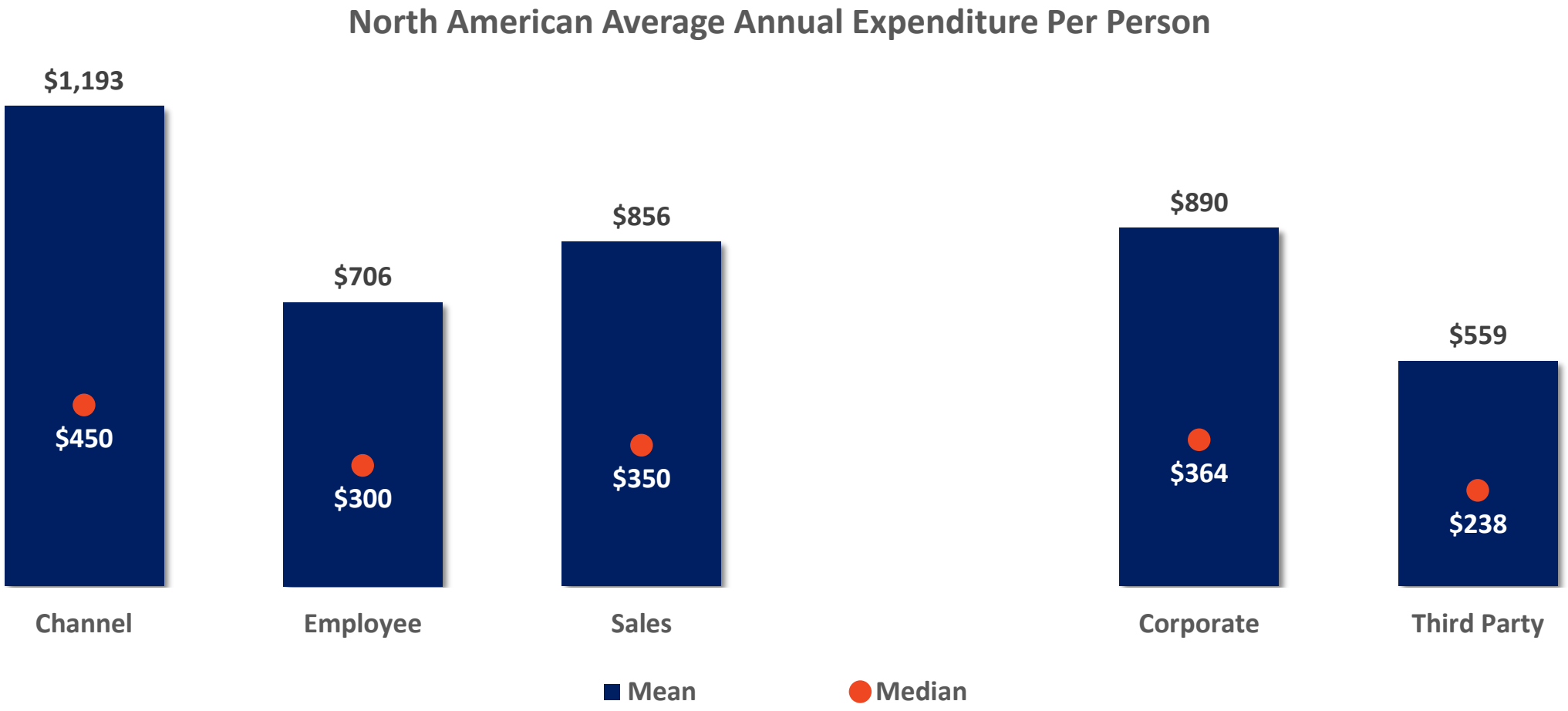
Reward and recognition spending per person continues to climb in Europe, while declining in North America



Q18: On average, what is the annual per-person spend on non-cash rewards, including merchandise and gift cards for your [channel/employee/sales] program?

Non-Cash Rewards & Recognition Spending

North American corporations, particularly those with channel programs, invest more in rewards and recognition



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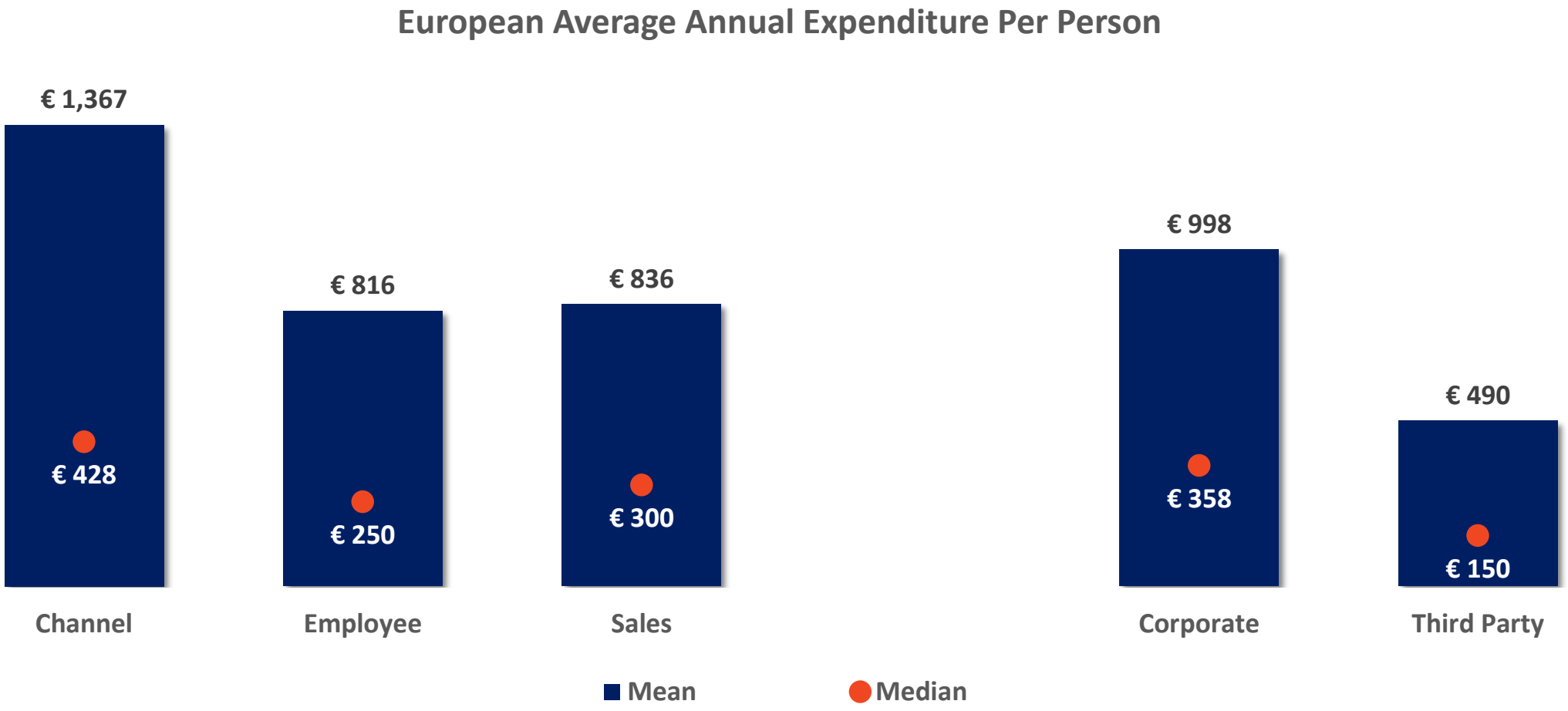
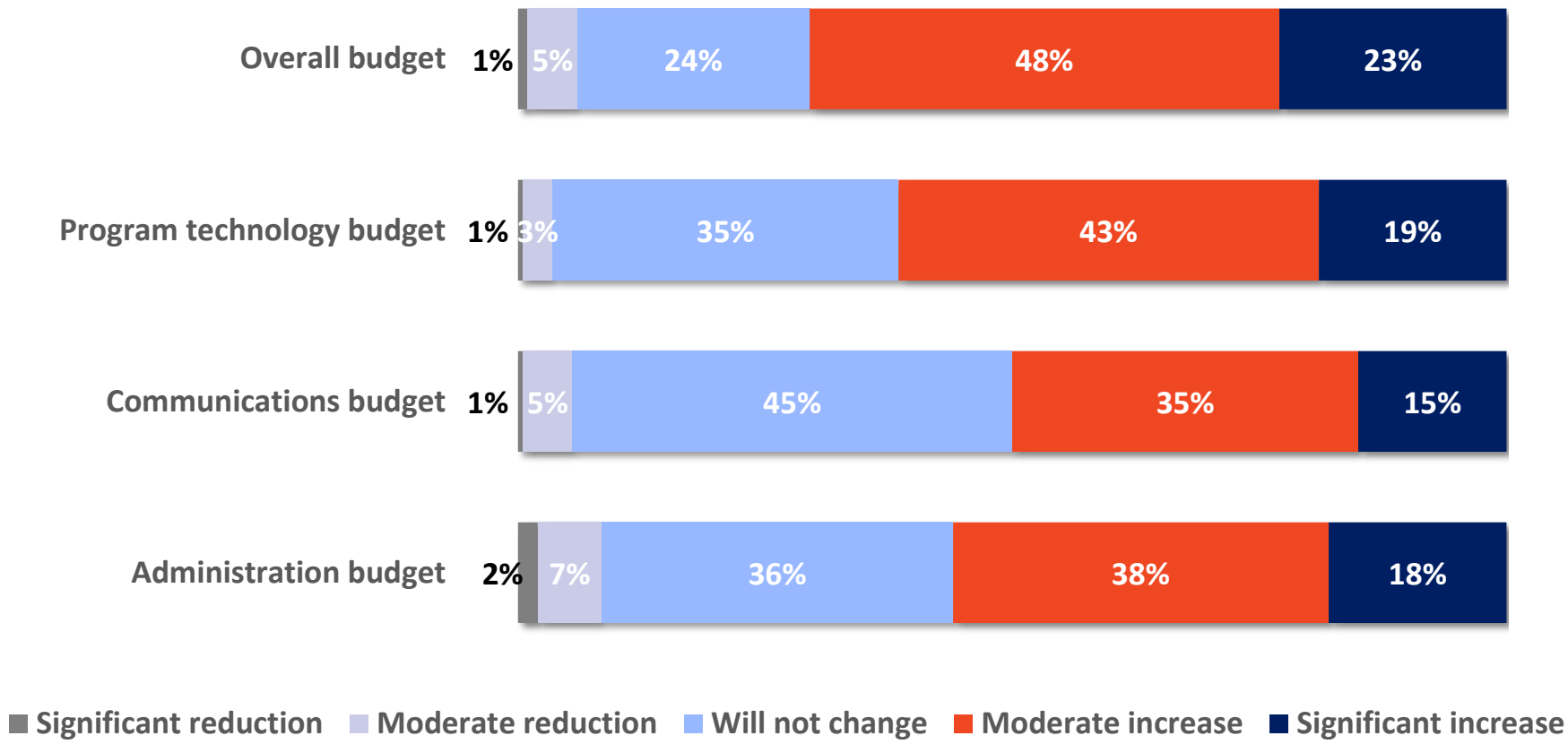


Q18: On average, what is the annual per-person spend on non-cash rewards, including merchandise and gift cards for your [channel/employee/sales] program?

Non-Cash Rewards & Recognition Budgets

Reward and recognition program budgets are generally increasing in North America

Anticipated Change in North American Non-Cash Rewards Budgets



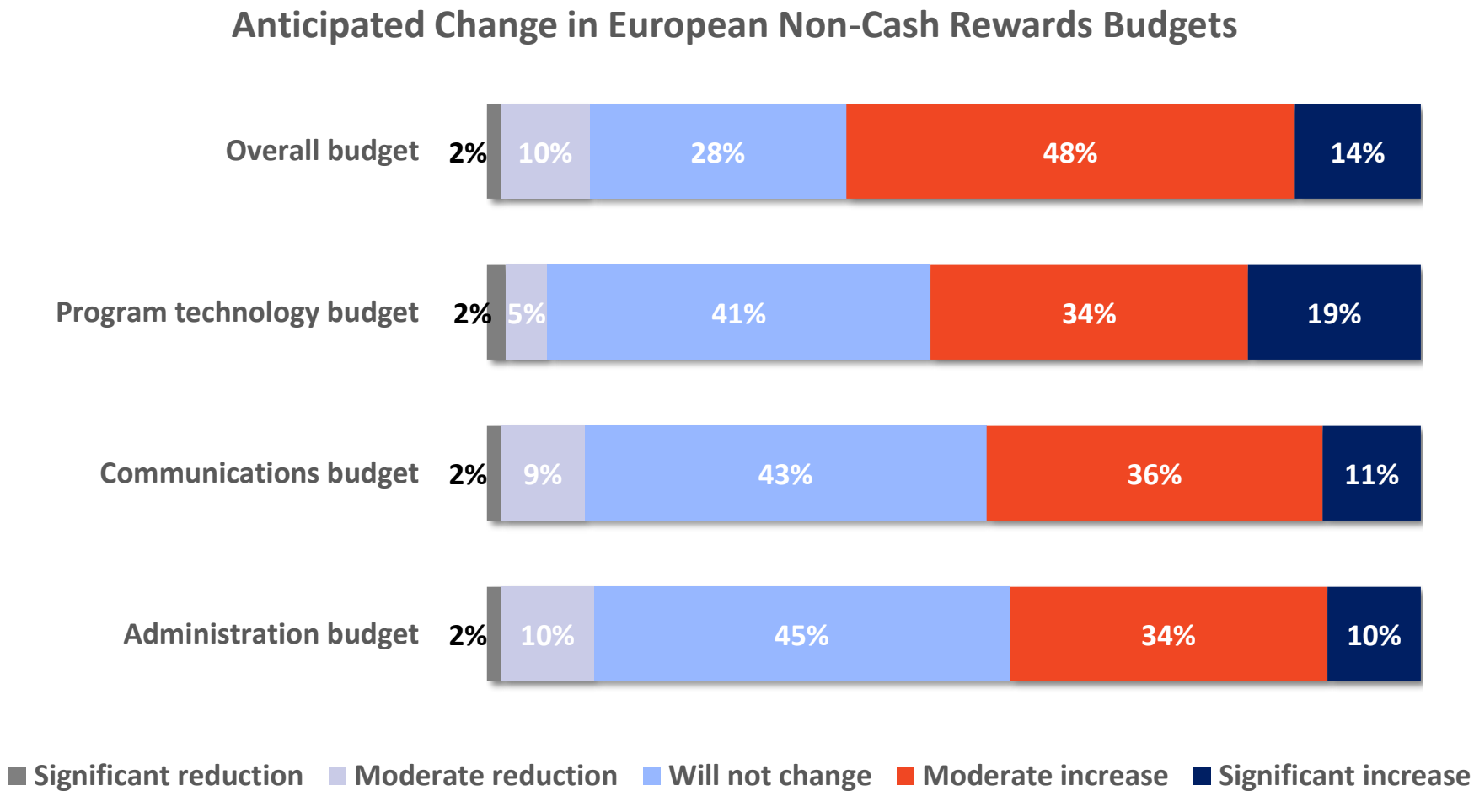
Just over 70% of organizations expect moderate or significant increase to their overall rewards and recognition budgets

Platforms, mobile apps, and other program technologies are projected to experience the strongest budget growth

Q22: In the coming year, do you generally anticipate the following program elements will increase, decrease, or remain unchanged for your non-cash rewards and recognition programs?

Non-Cash Rewards & Recognition Budgets

Reward and recognition program budgets are generally increasing in Europe



Just over 60% of organizations expect moderate or significant increase to their overall rewards and recognition budgets

The largest budget growth is expected in program technology, mirroring trends in North America

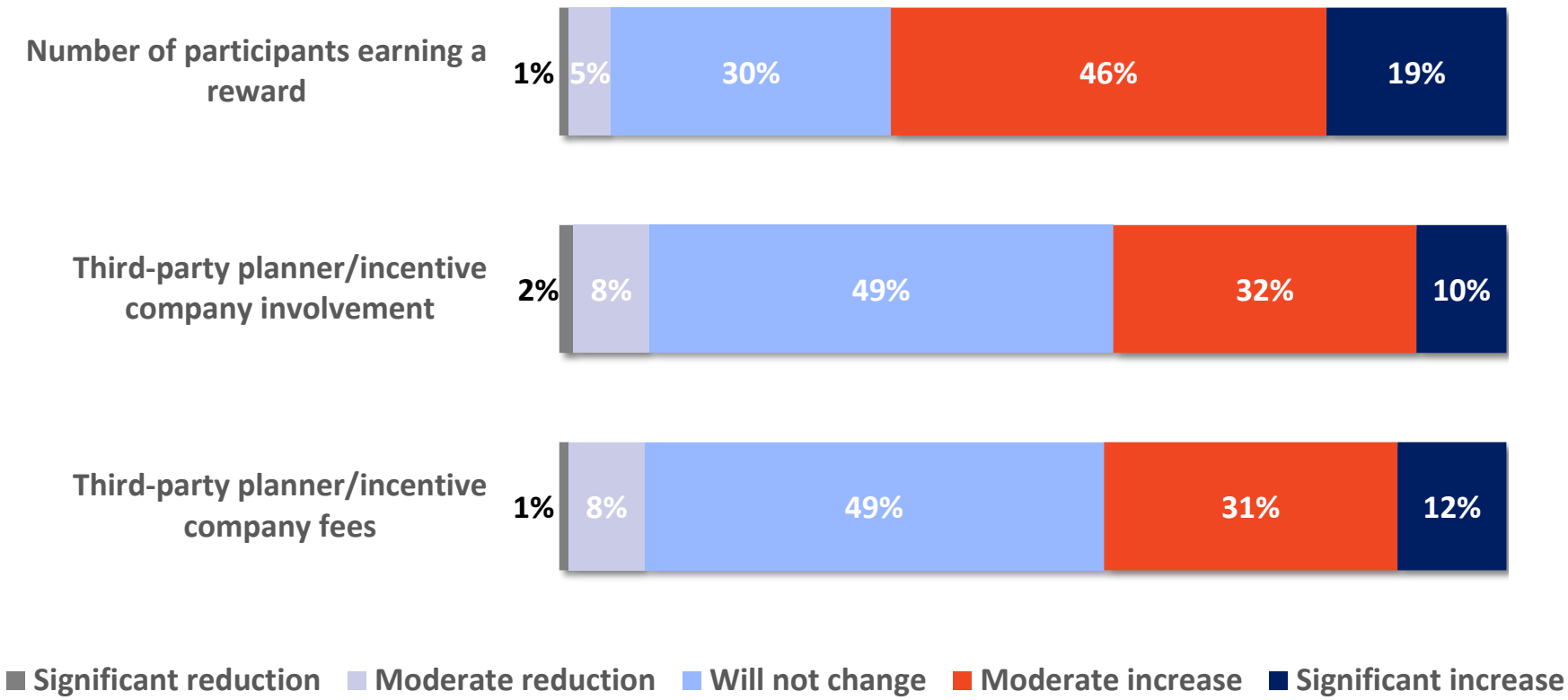
Fewer than half of organizations anticipate increases in communications or administration budgets

Q22: In the coming year, do you generally anticipate the following program elements will increase, decrease, or remain unchanged for your non-cash rewards and recognition programs?

Program Reach and Third-Party Engagement

North American participation growth is expected to outpace third-party involvement

Anticipated Change in North American Reward Frequency and Third-Party Involvement



65% of North American companies expect moderate or significant increases in the number of participants earning rewards

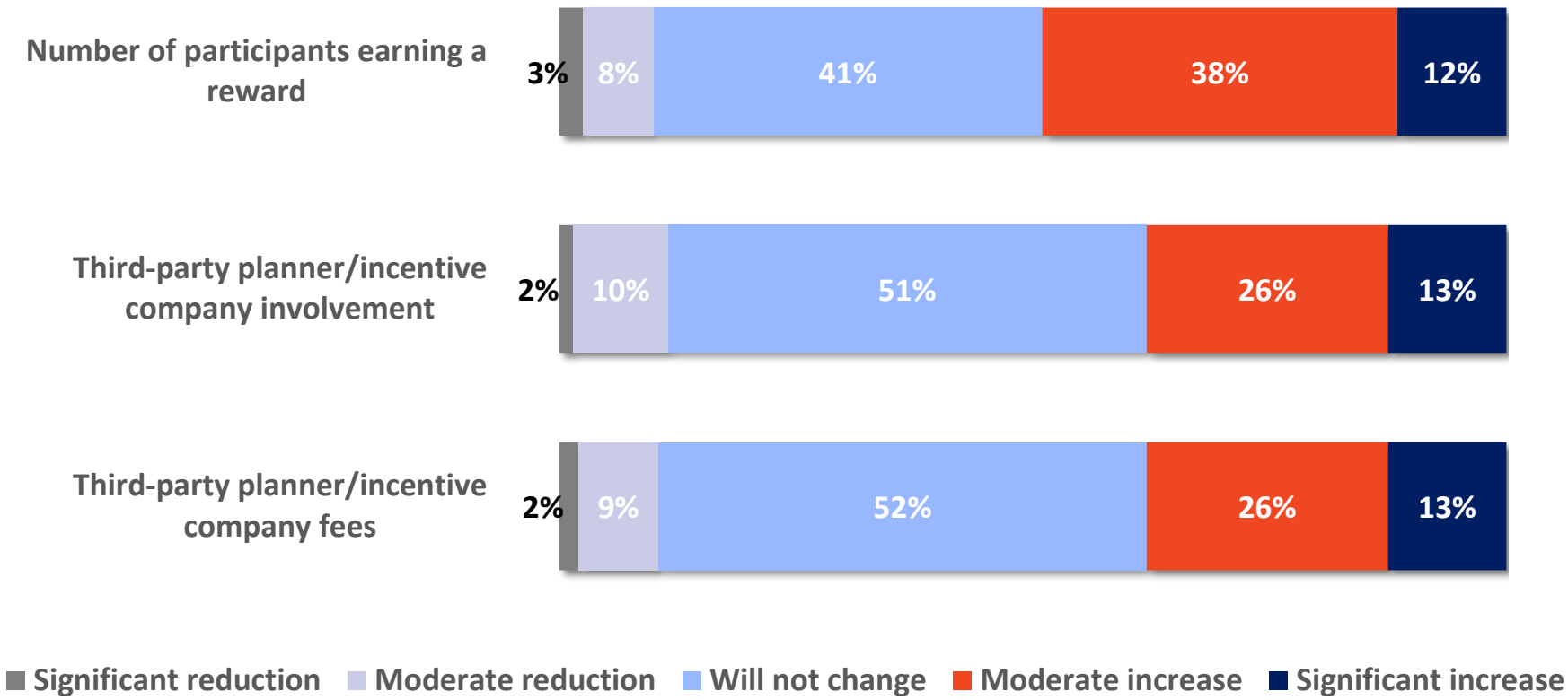
Nearly 60% of North American companies expect third-party involvement to remain stable or decrease

Q22: In the coming year, do you generally anticipate the following program elements will increase, decrease, or remain unchanged for your non-cash rewards and recognition programs?

Program Reach and Third-Party Engagement

European participation growth is expected to outpace third-party involvement

Anticipated Change in European Reward Frequency and Third-Party Involvement



Half of European companies expect moderate or significant increases in the number of participants earning rewards

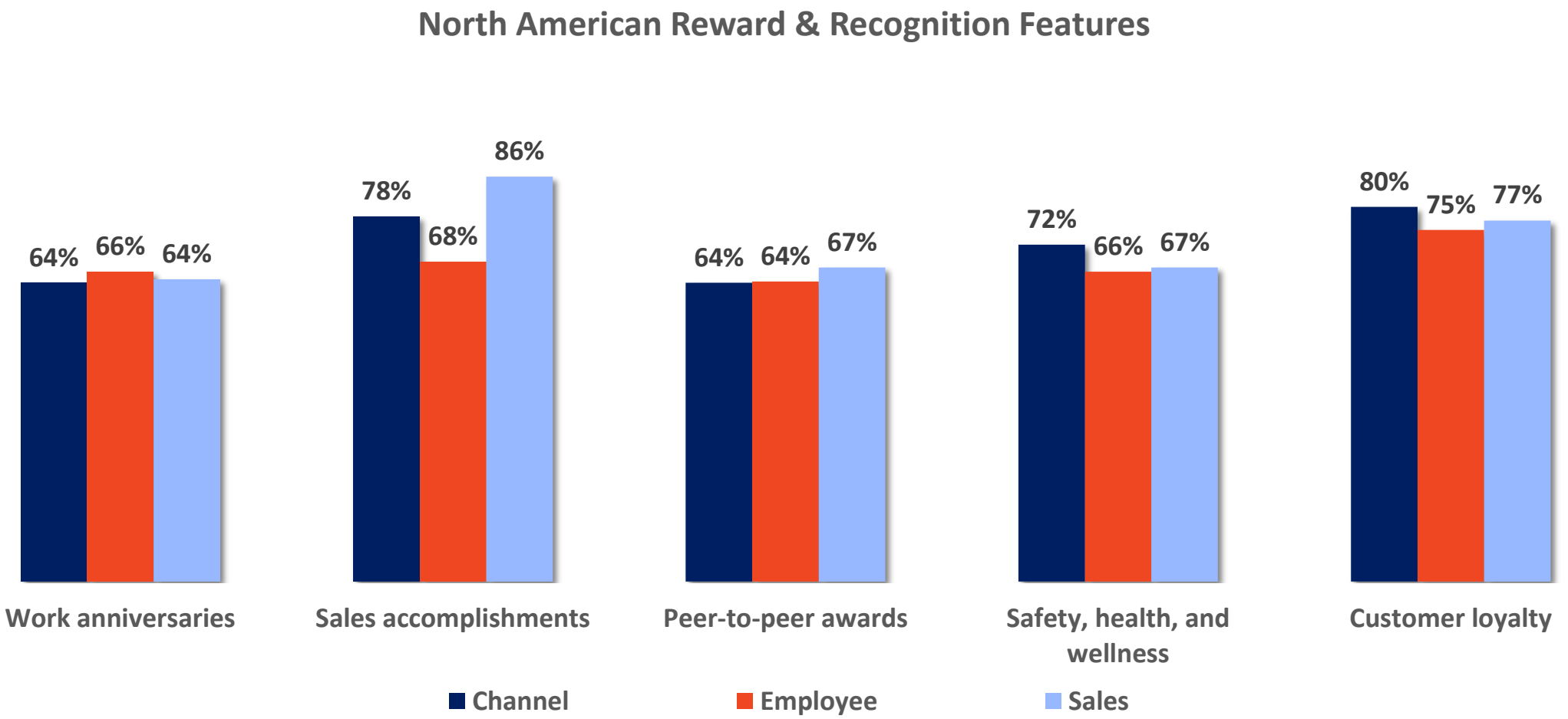
Over 60% of European companies expect third-party involvement to remain stable or decrease

Q22: In the coming year, do you generally anticipate the following program elements will increase, decrease, or remain unchanged for your non-cash rewards and recognition programs?

Program Elements & Partnerships

Reward & Recognition Features

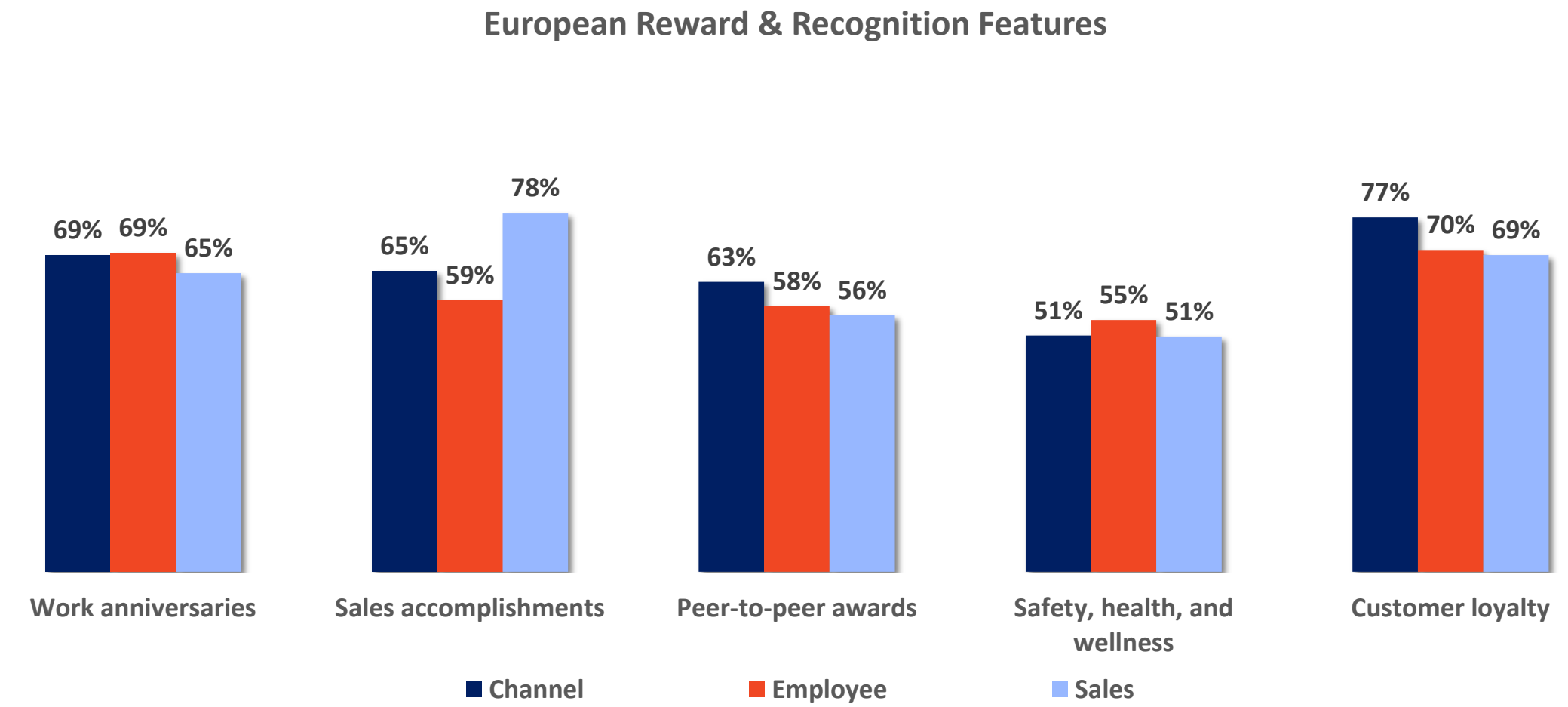
North American reward programs encompass a wide range of features, led by customer loyalty.



Q27: Which of the following features does your program include?

Reward & Recognition Features

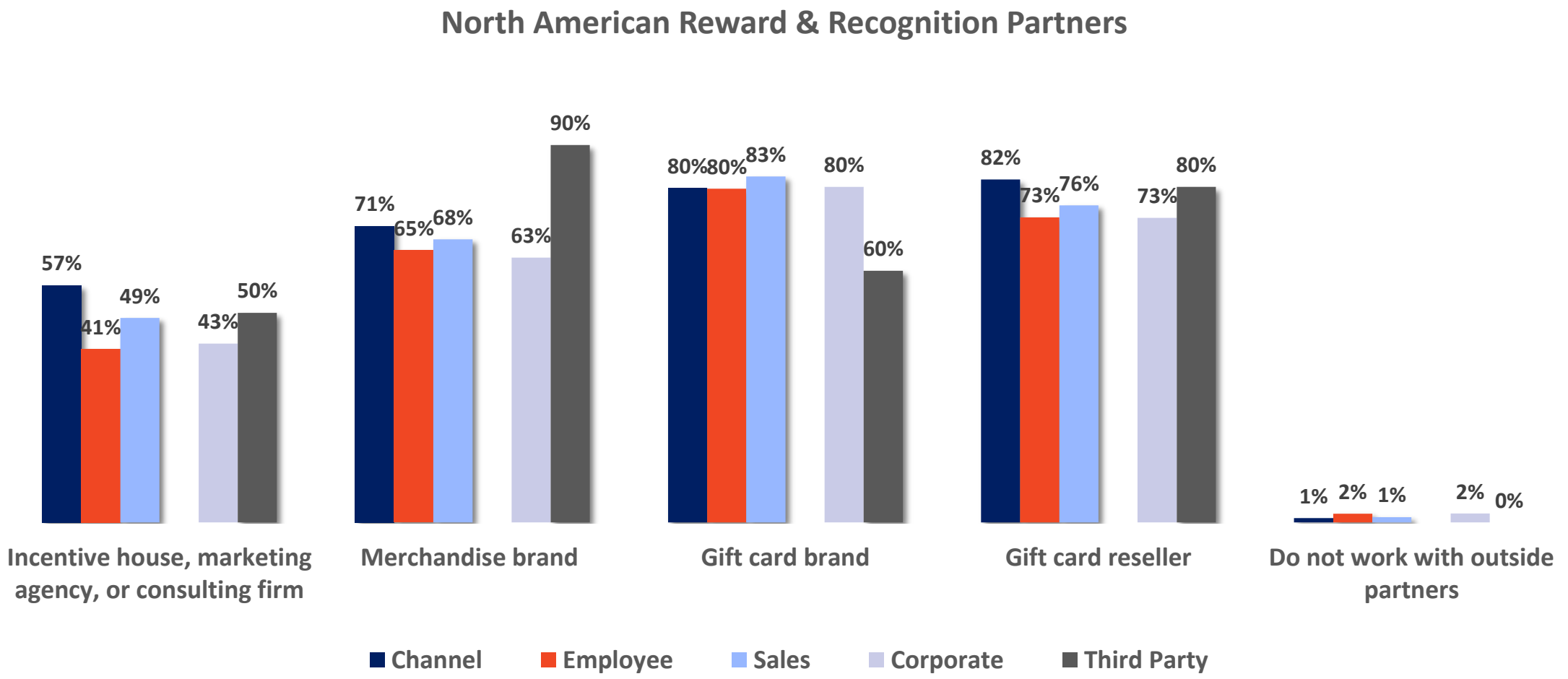
In Europe, safety, health, and wellness and peer-to-peer rewards are less prominent.



Q27: Which of the following features does your program include?

Reward & Recognition Partners

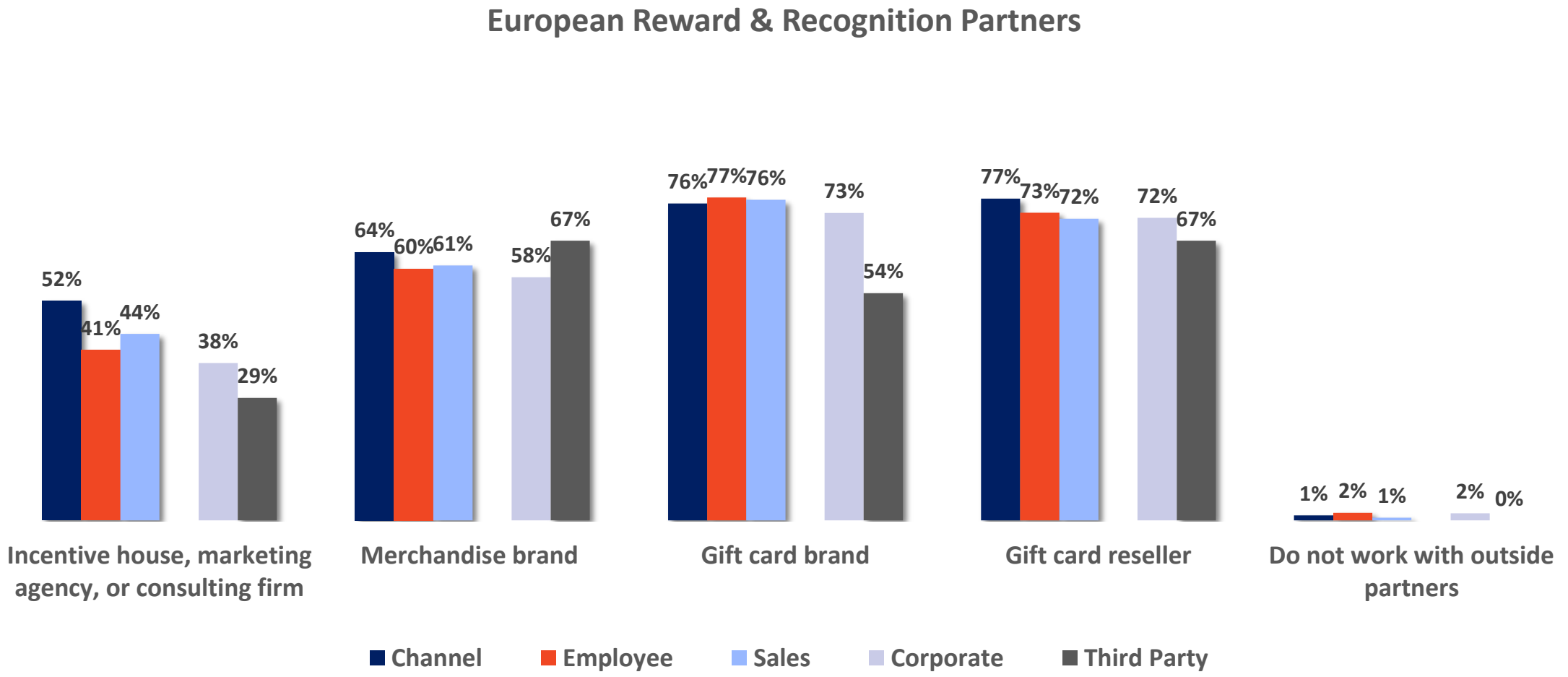
North American programs prioritize partnerships with gift card brands and resellers.



Q28: For your non-cash reward and recognition programs, which of the following types of partners do you work with DIRECTLY?

Reward & Recognition Partners

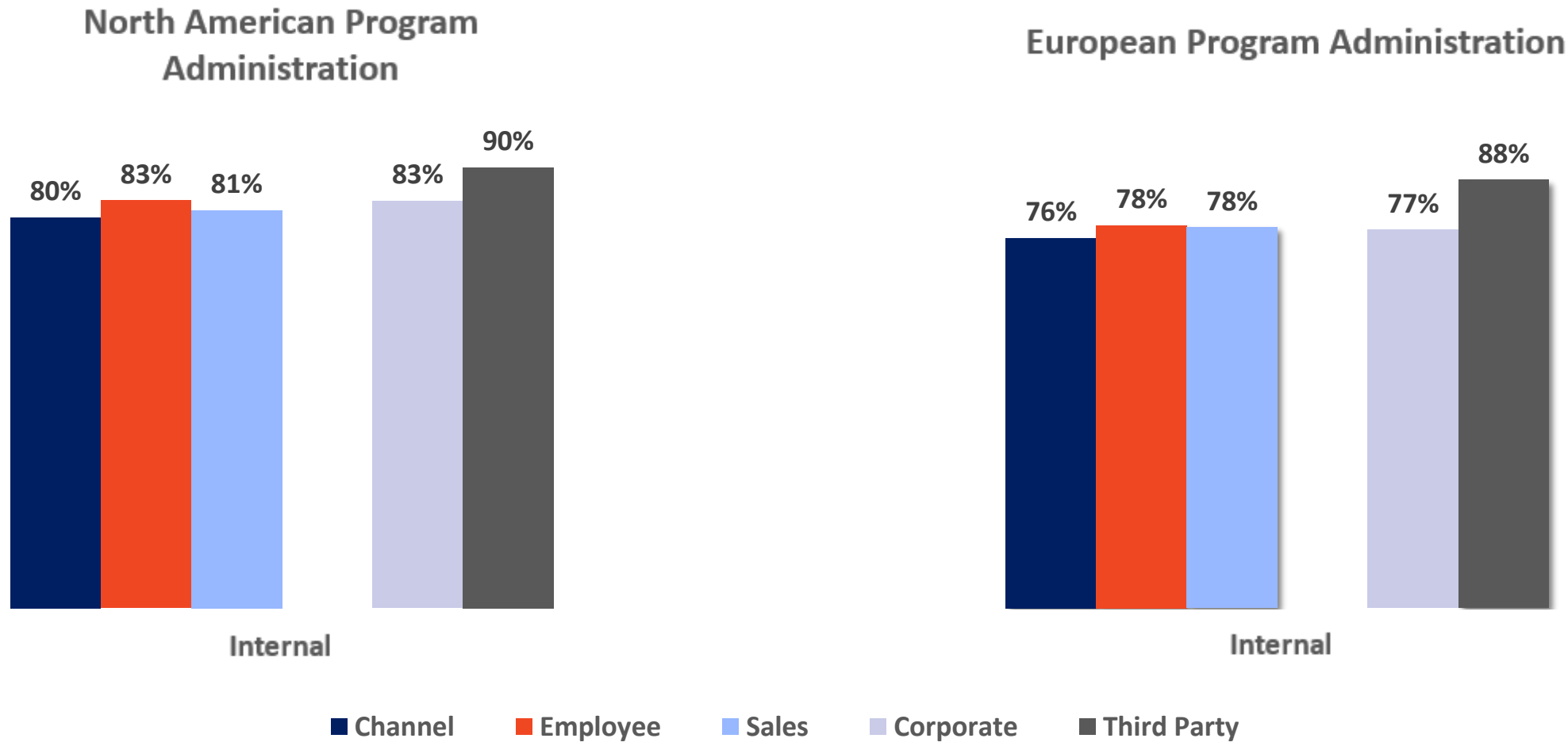
Gift card brands and resellers are also the most prominent partners in European programs.



Q28: For your non-cash reward and recognition programs, which of the following types of partners do you work with DIRECTLY?

Program Administration

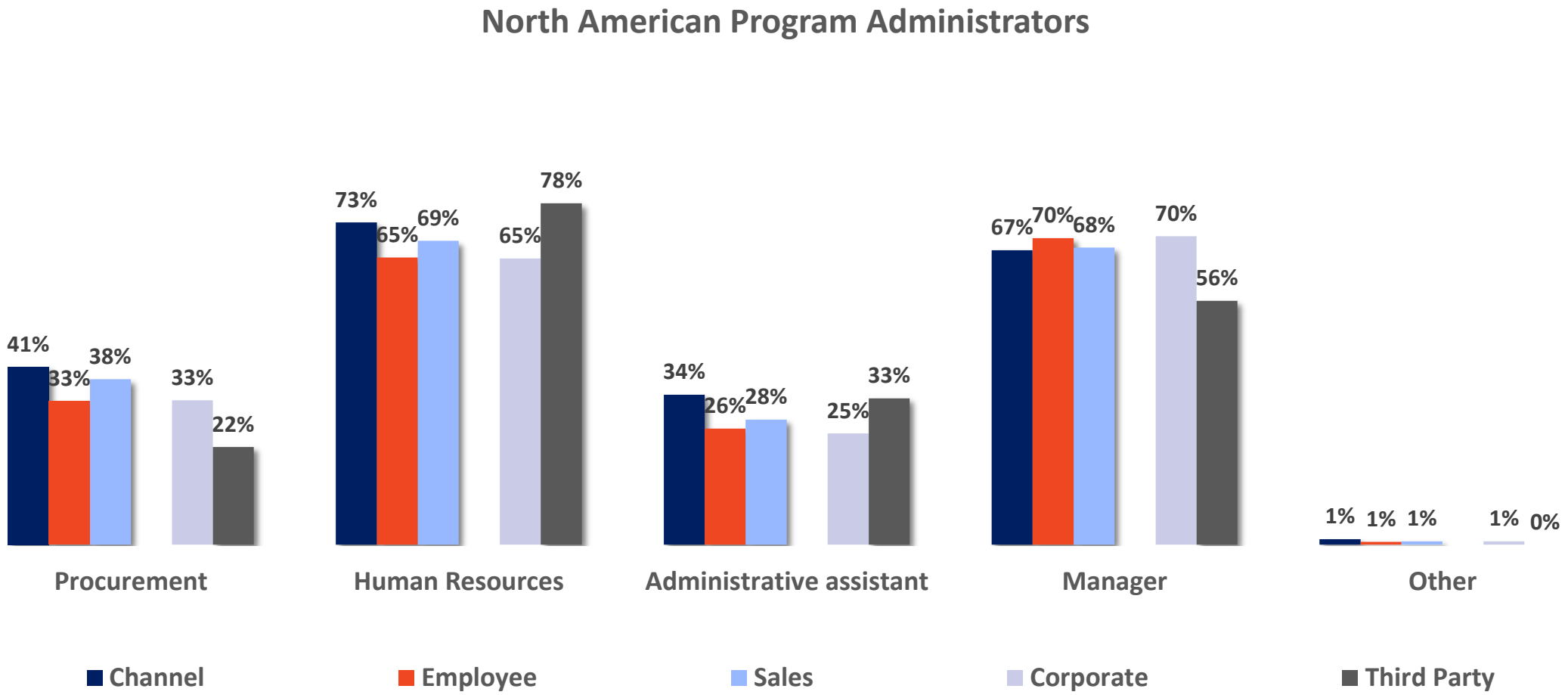
In both North America and Europe, most organizations are administering their programs internally.



Q29: How are your recognition/rewards programs administered?

Program Administration

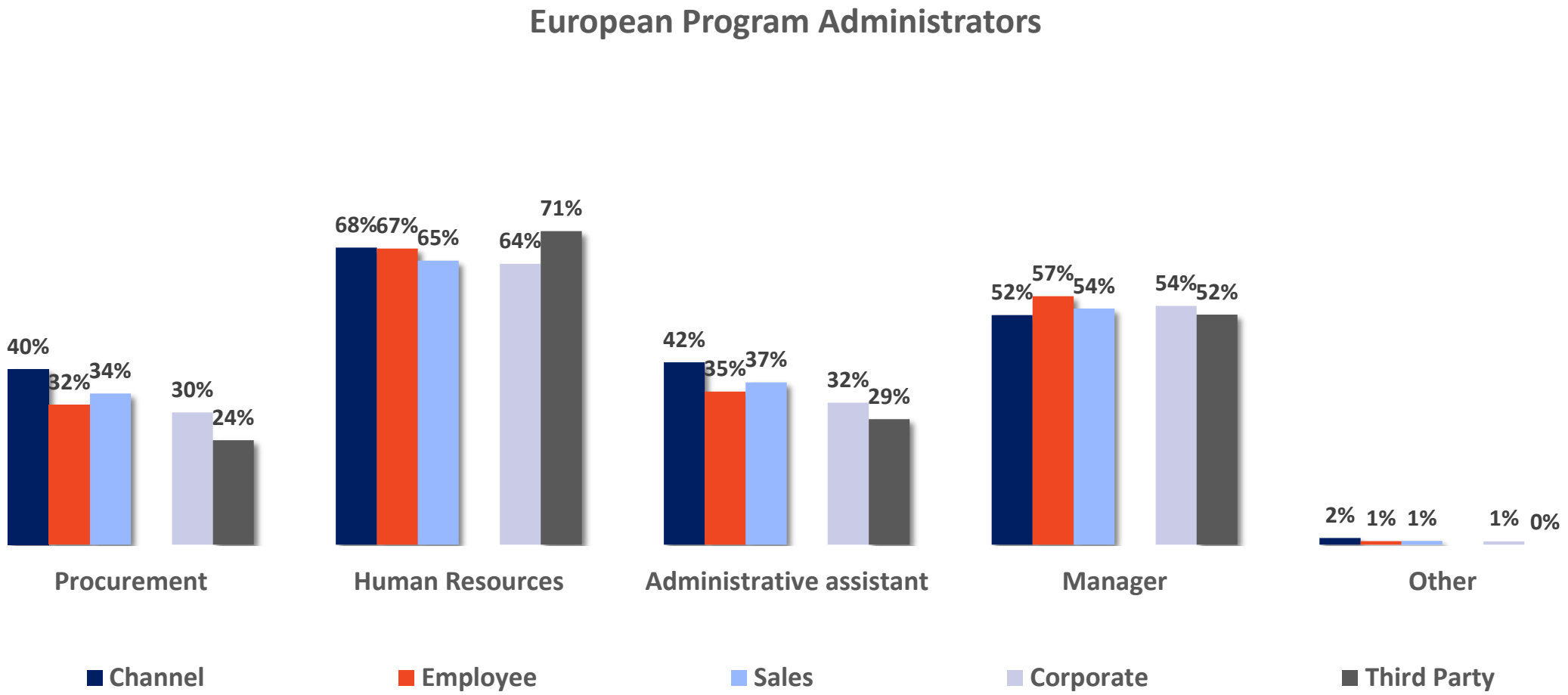
North Americans rely heavily on HR and management to administer reward and recognition programs.



Q31: How are your recognition/rewards programs administered?

Program Administration

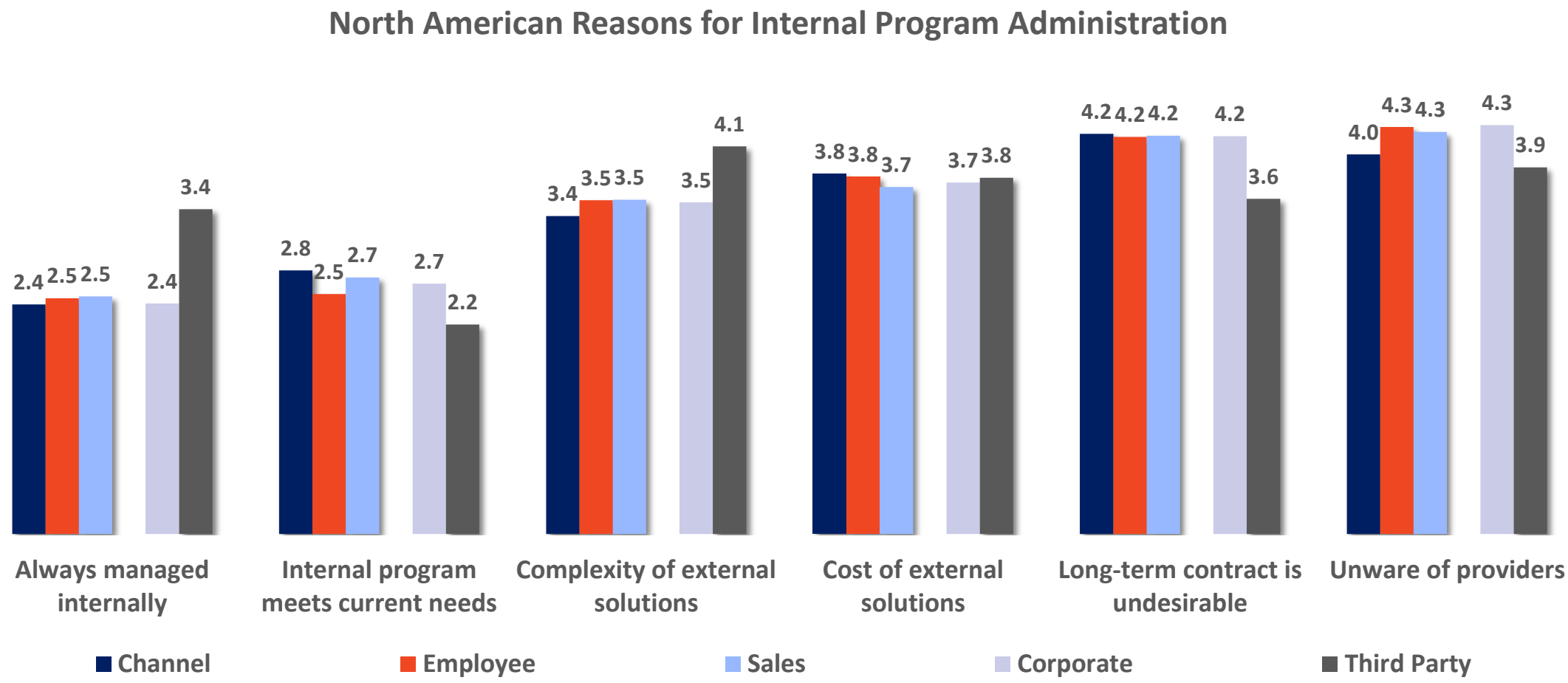
Europeans depend on HR to administer reward and recognition programs, with less involvement from management.



Q31: How are your recognition/rewards programs administered?

Program Administration

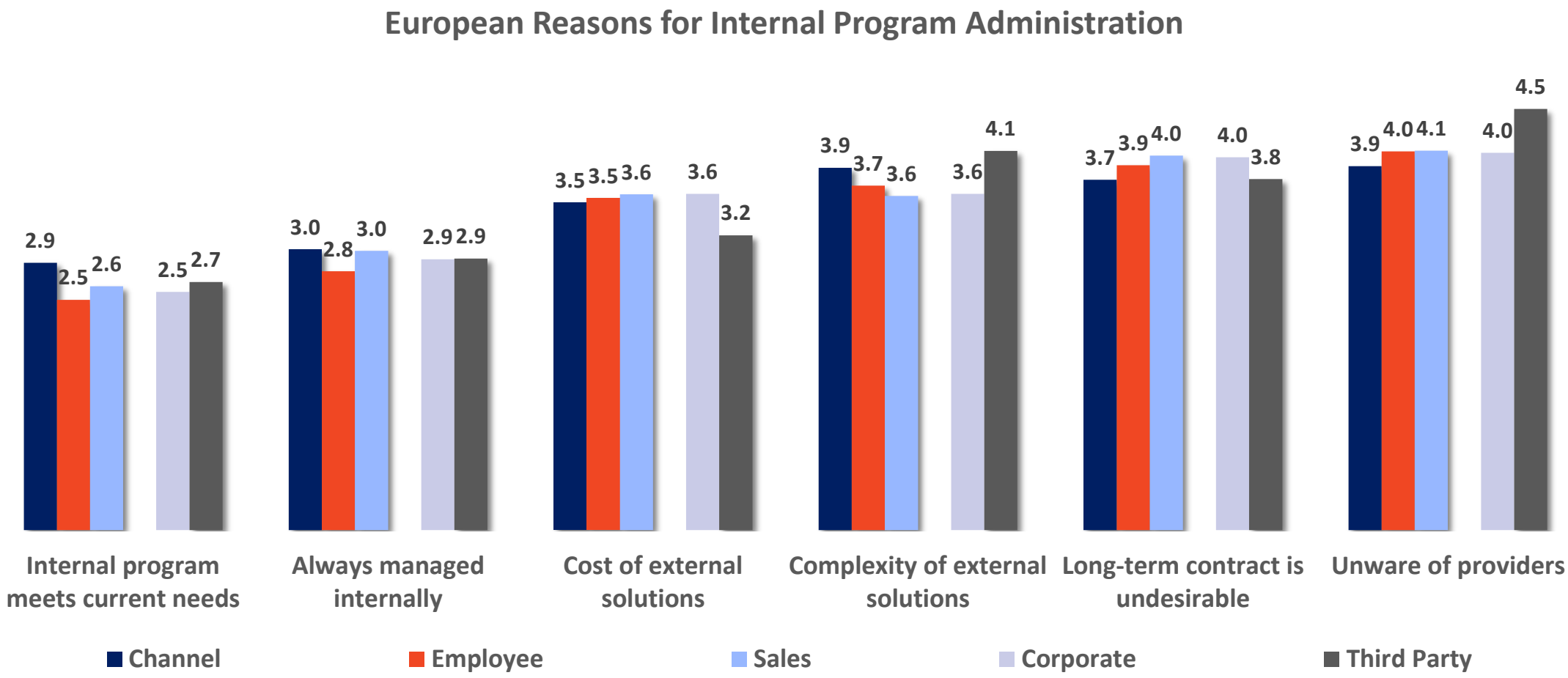
North American organizations manage programs internally due to familiarity and ability to meet their own needs.



Q30: Rank the following reasons (from most to least important) for why you/your company manages your employee recognition/rewards program internally rather than using a solutions provider.

Program Administration

Effectiveness and familiarity also drive Europeans to administer programs internally.

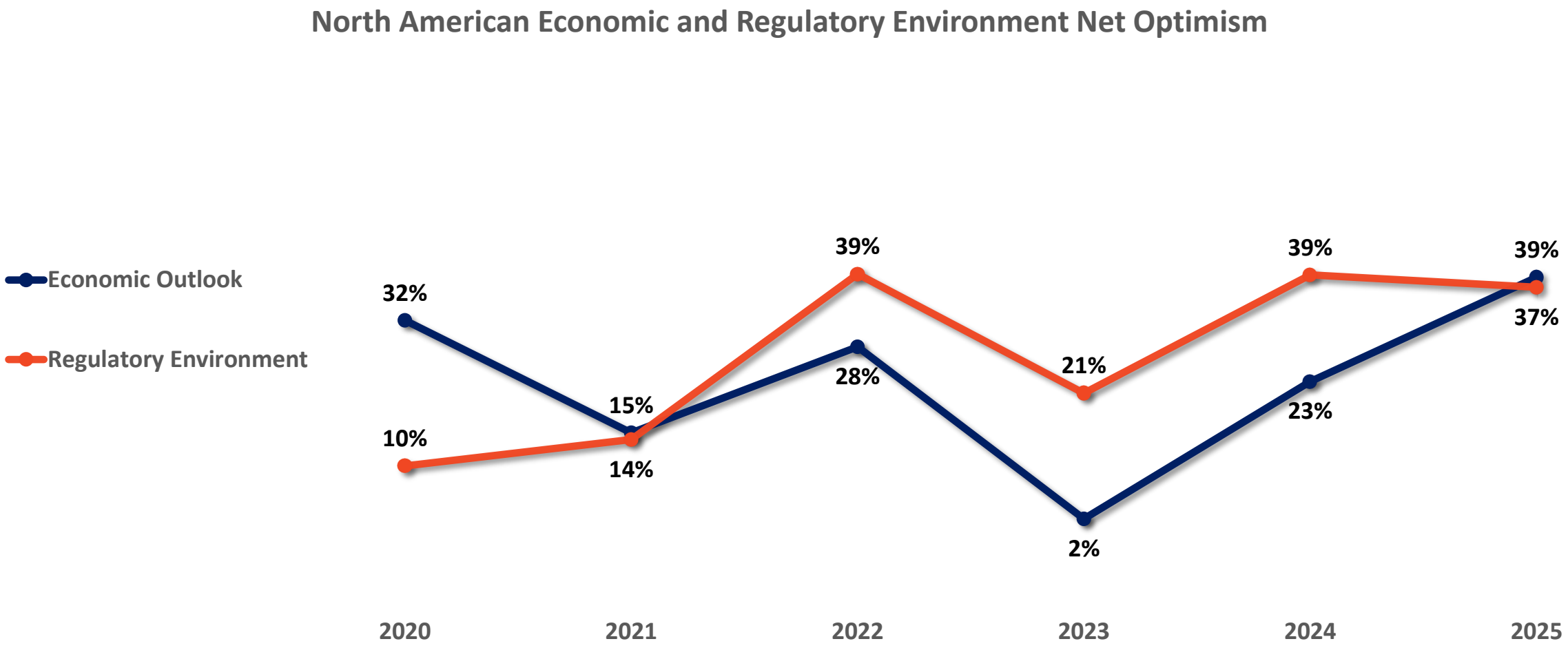


Q30: Rank the following reasons (from most to least important) for why you/your company manages your employee recognition/rewards program internally rather than using a solutions provider.

Influences on Reward & Recognition

Economic & Regulatory Environment Net Optimism

Economic optimism continues to rise in North America, while regulatory environment optimism remains consistent

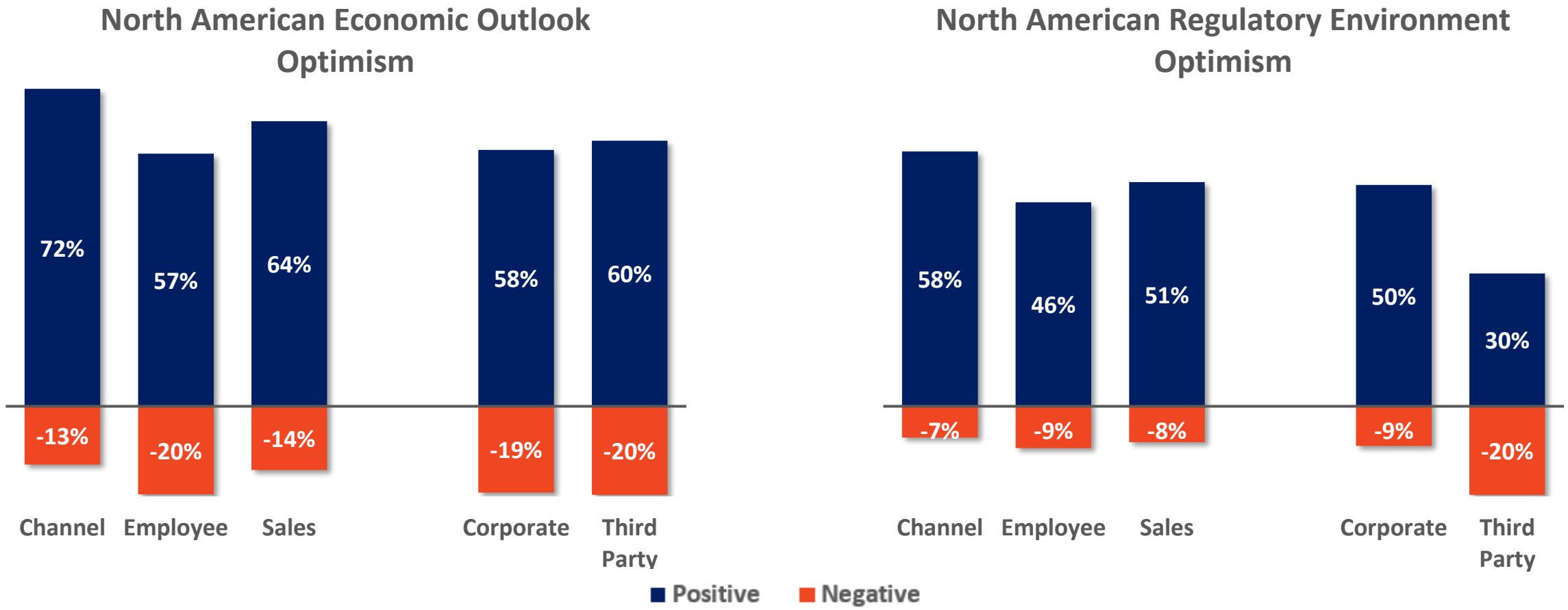


Q26: In the coming year, what impact will the following factors below have on non-cash reward and recognition program planning and execution?

Net optimism = % positive - % negative

Economic & Regulatory Environment Optimism

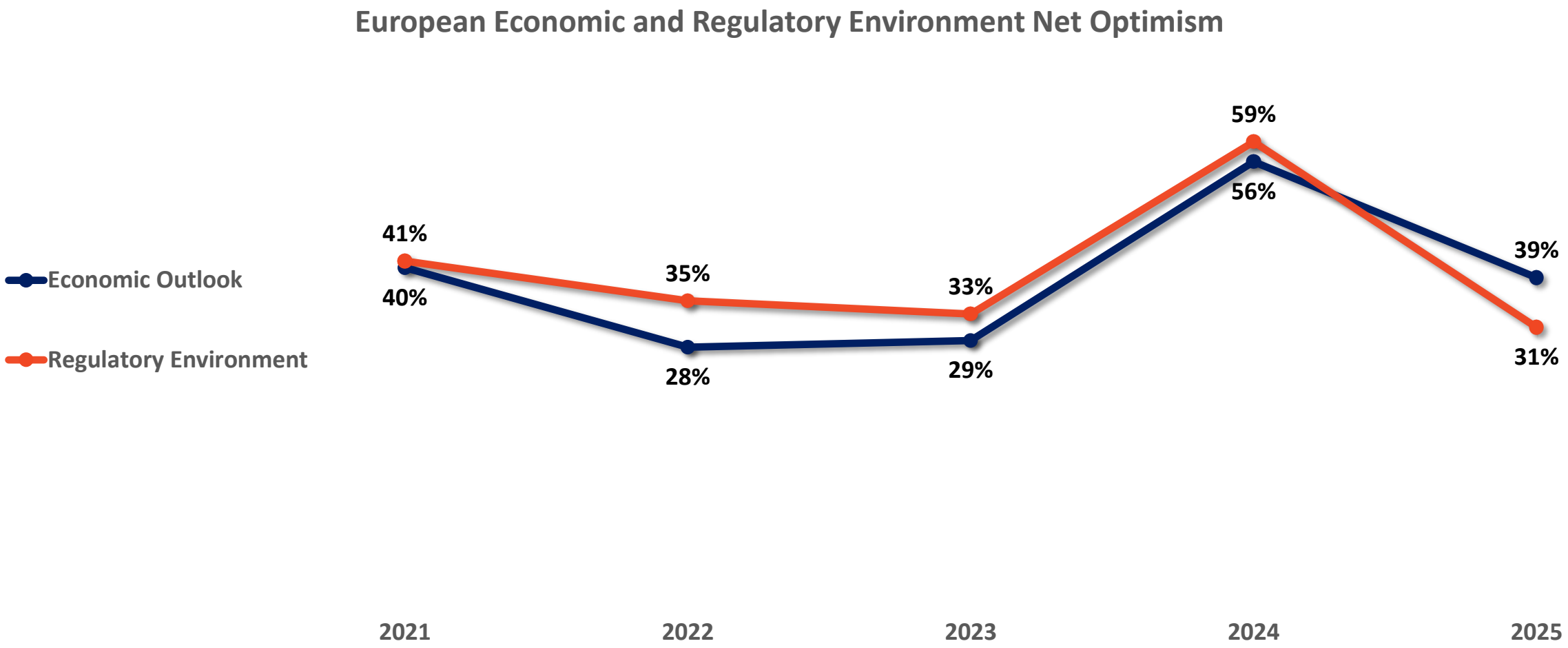
North American organizations with channel programs report the highest economic optimism, while third parties face the biggest regulatory concerns



Q26: In the coming year, what impact will the following factors below have on non-cash reward and recognition program planning and execution?

Economic & Regulatory Environment Net Optimism

Economic and regulatory environment optimism is declining in Europe

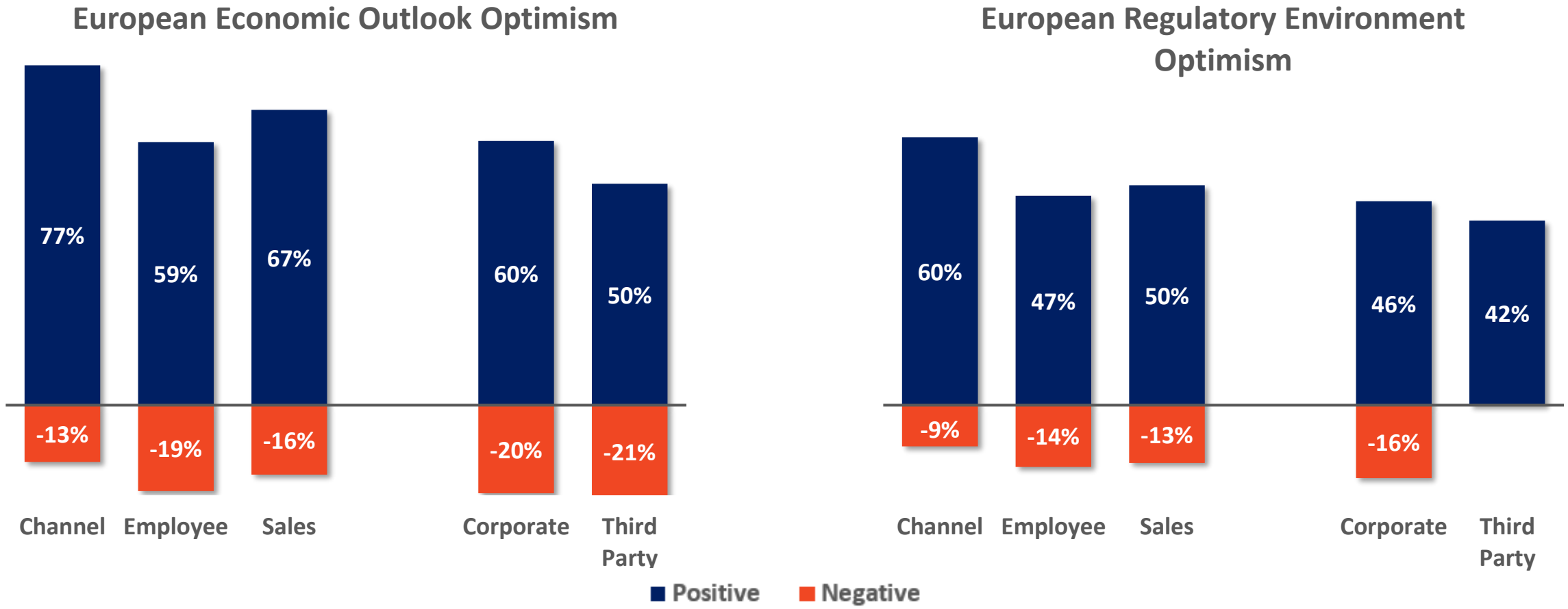


Q26: In the coming year, what impact will the following factors below have on non-cash reward and recognition program planning and execution?

Net optimism = % positive - % negative

Economic & Regulatory Environment Optimism

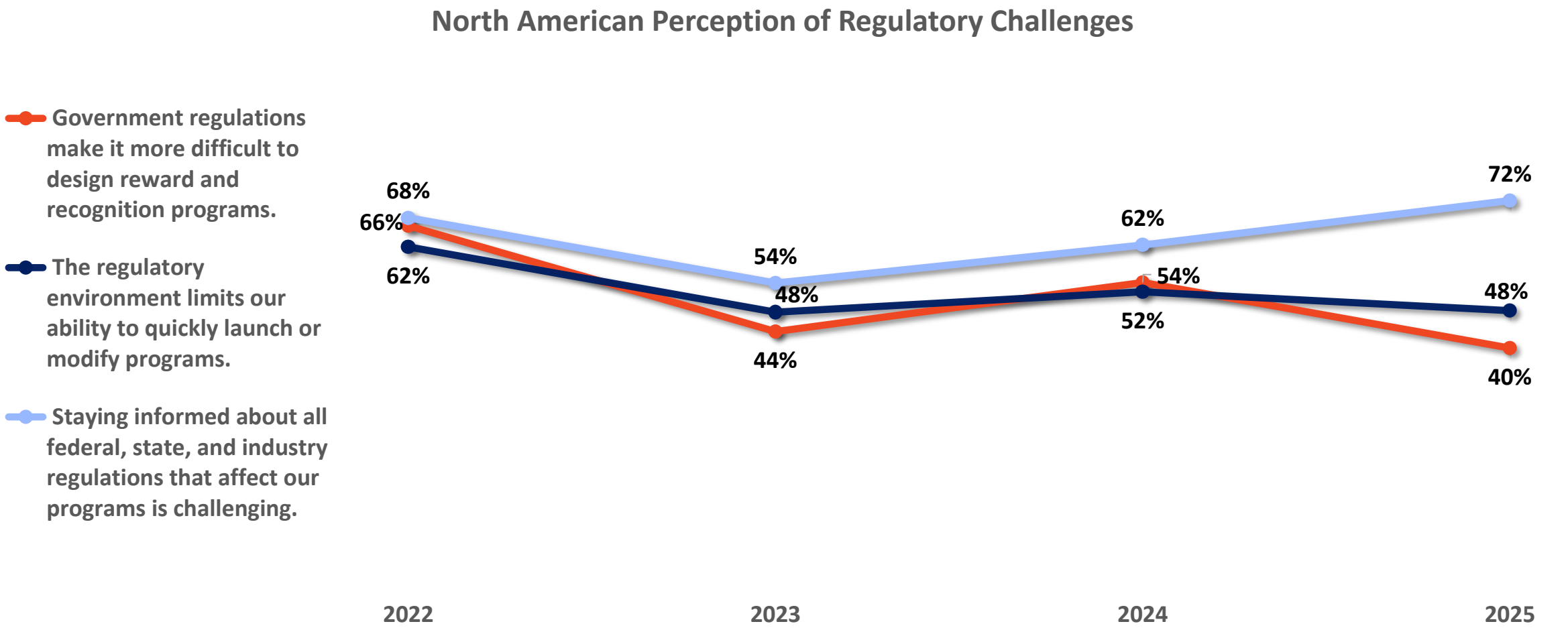
In Europe, organizations with channel programs have the most positive economic outlook, while third parties hold only positive or neutral views on regulations



Q26: In the coming year, what impact will the following factors below have on non-cash reward and recognition program planning and execution?

Regulatory Environment Impact

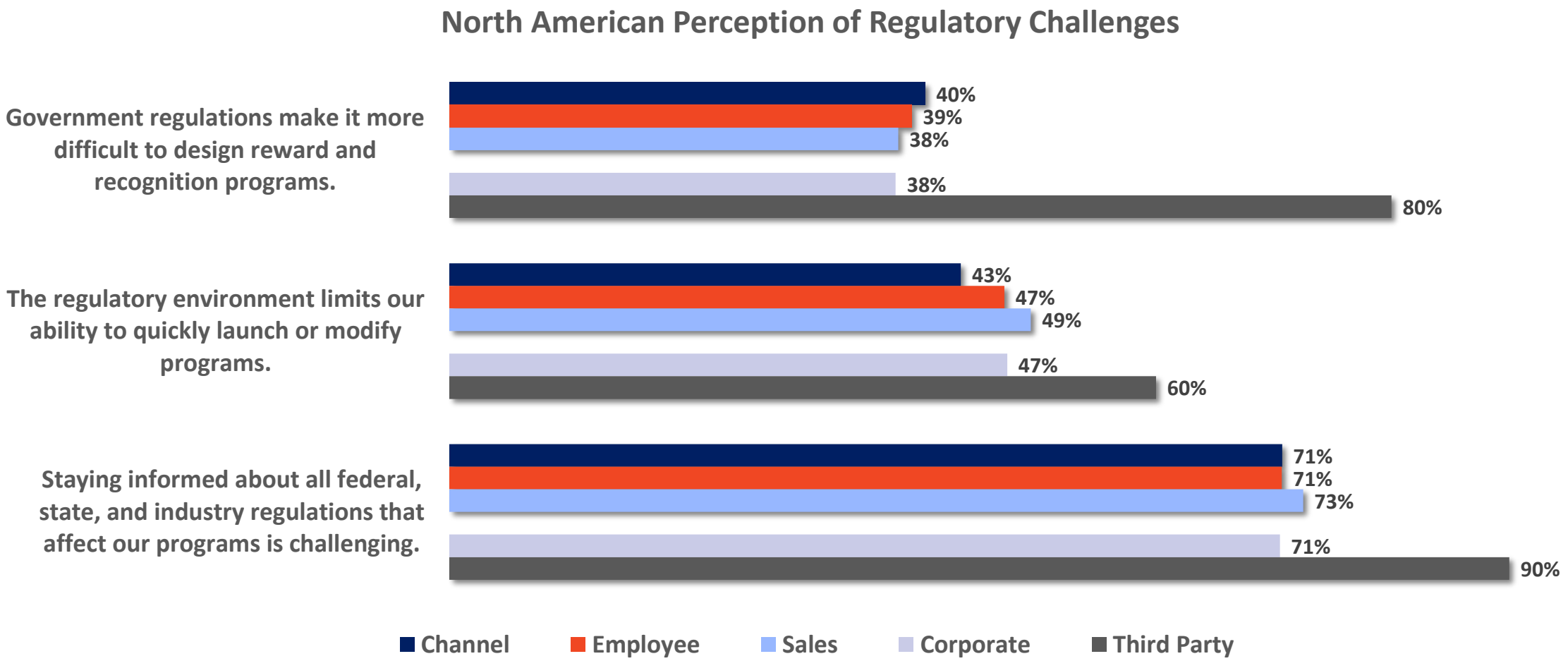
North Americans face greater challenges remaining informed on regulations but perceive fewer compliance issues



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

Regulatory Environment Impact

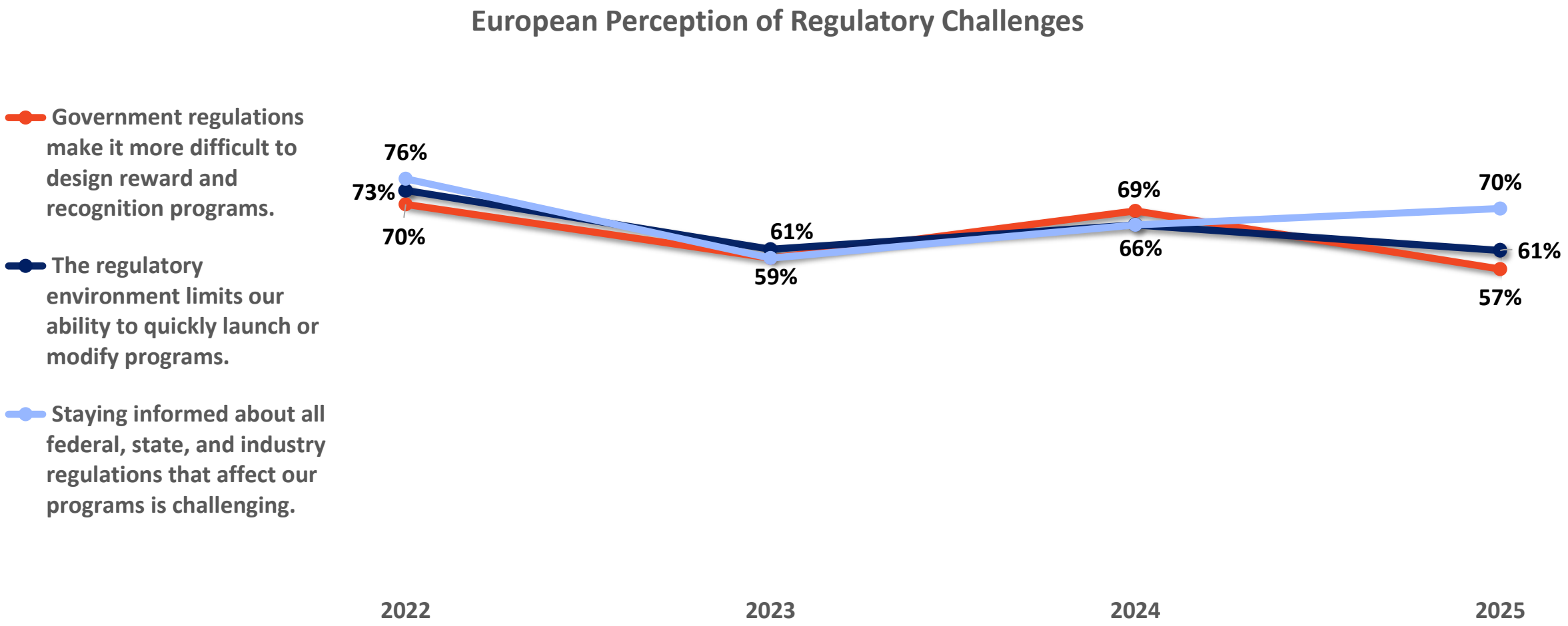
North American third parties experience greater challenges with the regulatory environment



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

Regulatory Environment Impact

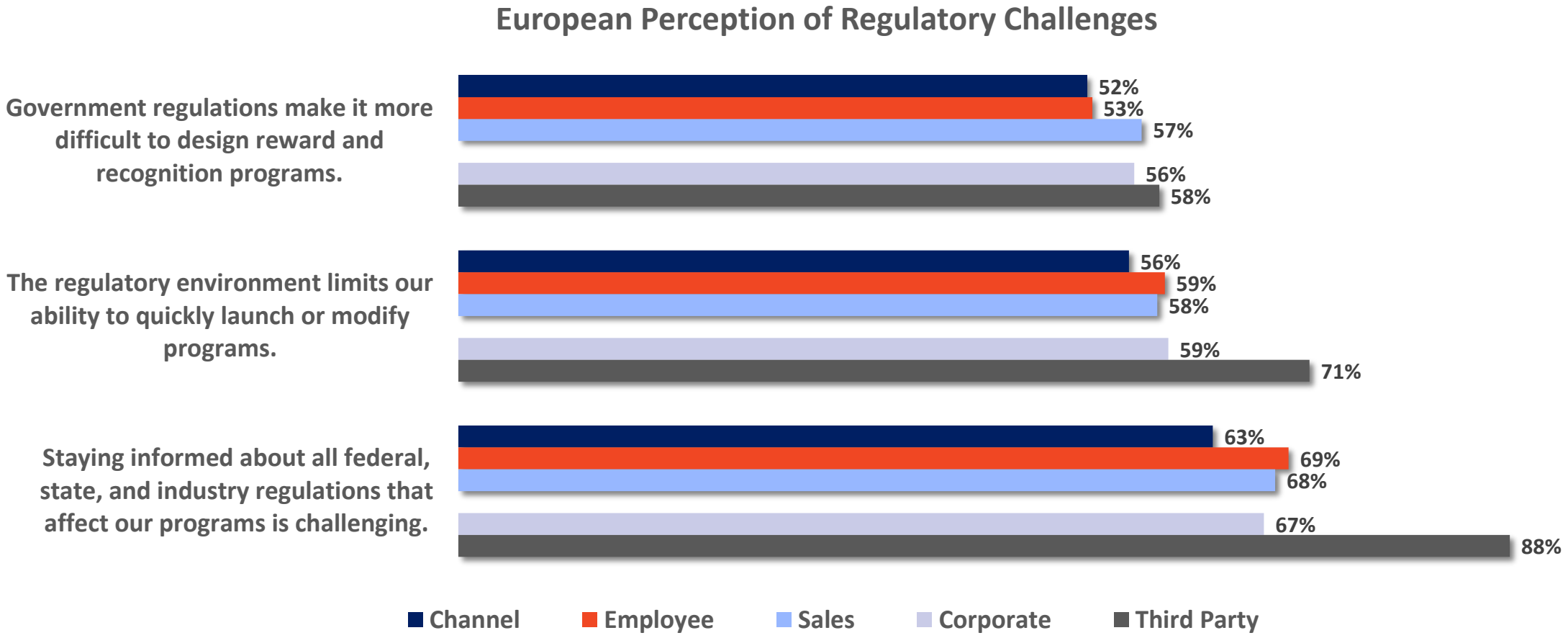
Europeans also face greater difficulty staying informed on regulations but experience fewer compliance issues



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

Regulatory Environment Impact

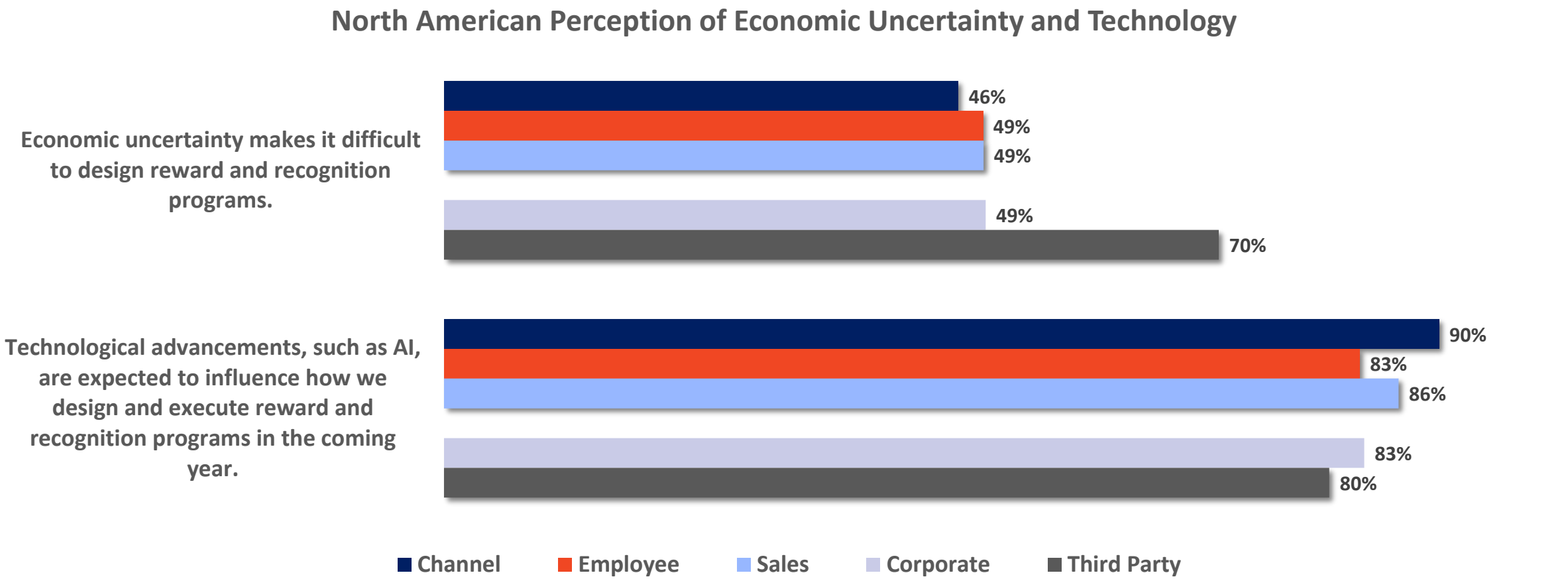
European third-party organizations face greater challenges staying informed on regulations, affecting program adaptation



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

Economic Uncertainty & Technology

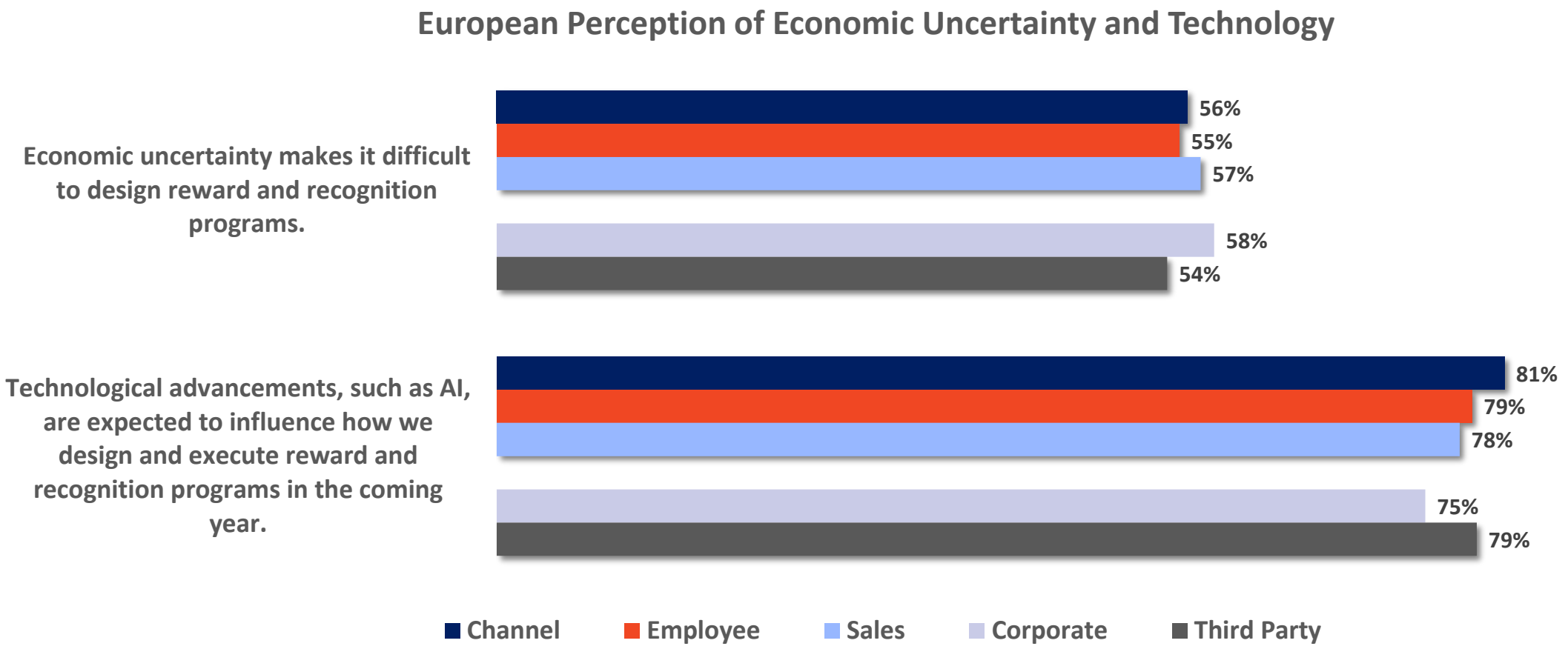
Economic uncertainty challenges third parties in North America, while technology is set to reshape program design across all organizations



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

Economic Uncertainty & Technology

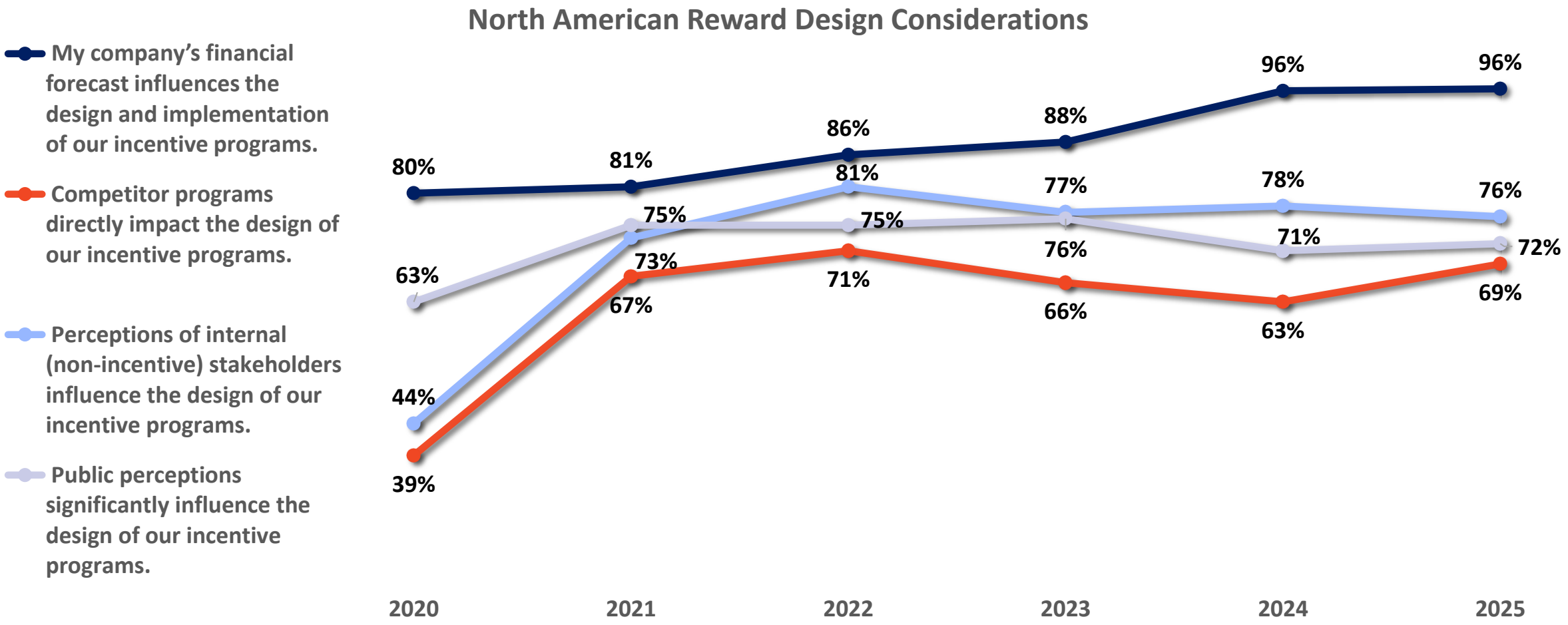
Economic uncertainty is of moderate concern in Europe, yet technology is set to reshape program design across all organizations



Q23: How much do you agree or disagree with each of the following statements?
Percent 'Strongly agree' or 'Agree'

Additional Considerations for Program Design

In North America, financial forecast continues to drive reward design decision-making

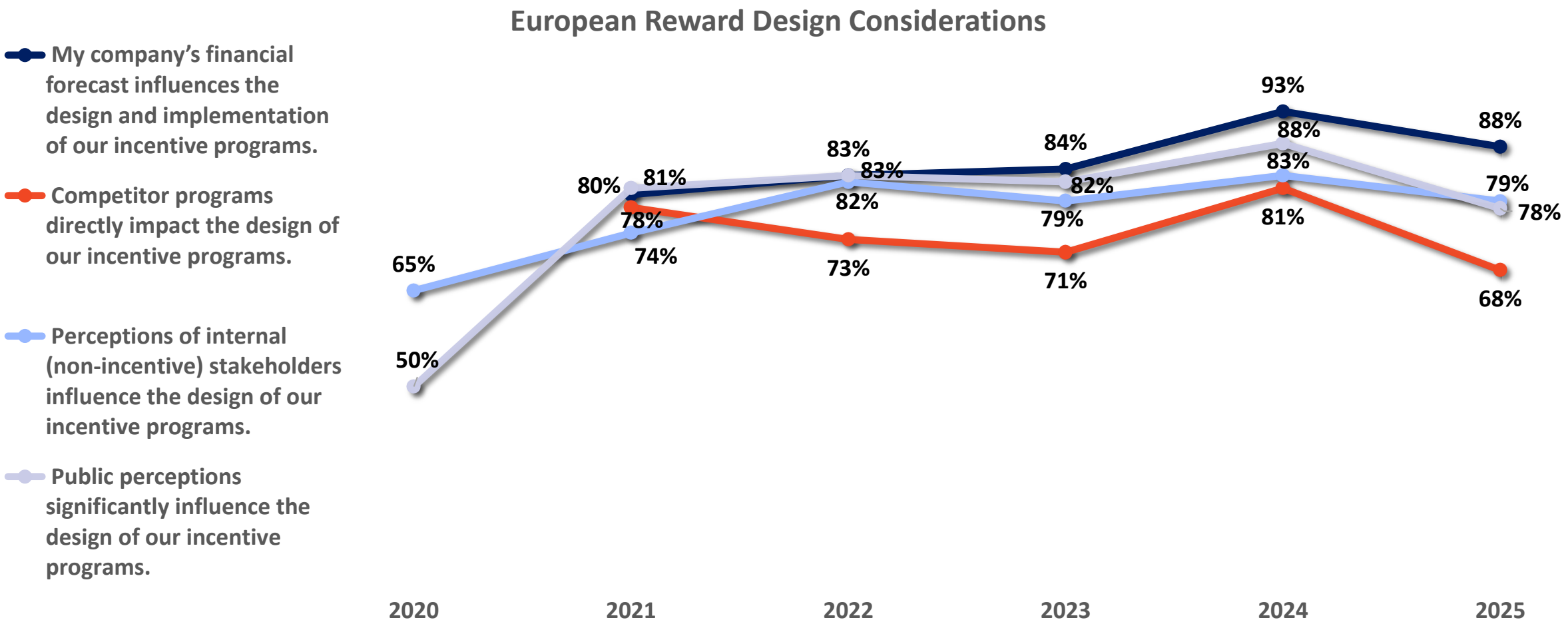


Q24: Please indicate the level of your agreement or disagreement with the following statements as they relate to your most recent incentive program.

Percent 'Strongly agree' or 'Agree'

Additional Considerations for Program Design

Financial forecasts remain a dominant driver of European program design, while competitor influence declines



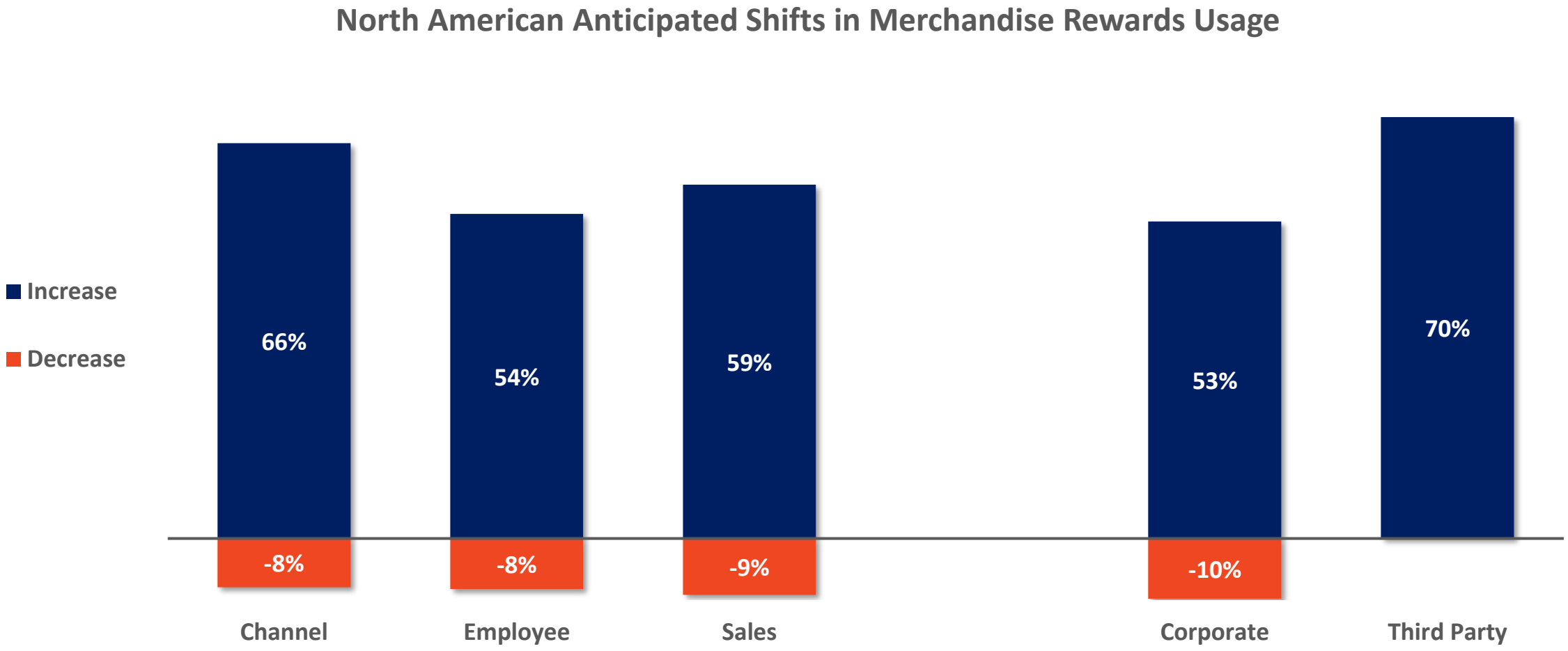
Q24: Please indicate the level of your agreement or disagreement with the following statements as they relate to your most recent incentive program.

Percent 'Strongly agree' or 'Agree'

Merchandise Rewards

Anticipated Shifts in Merchandise Rewards

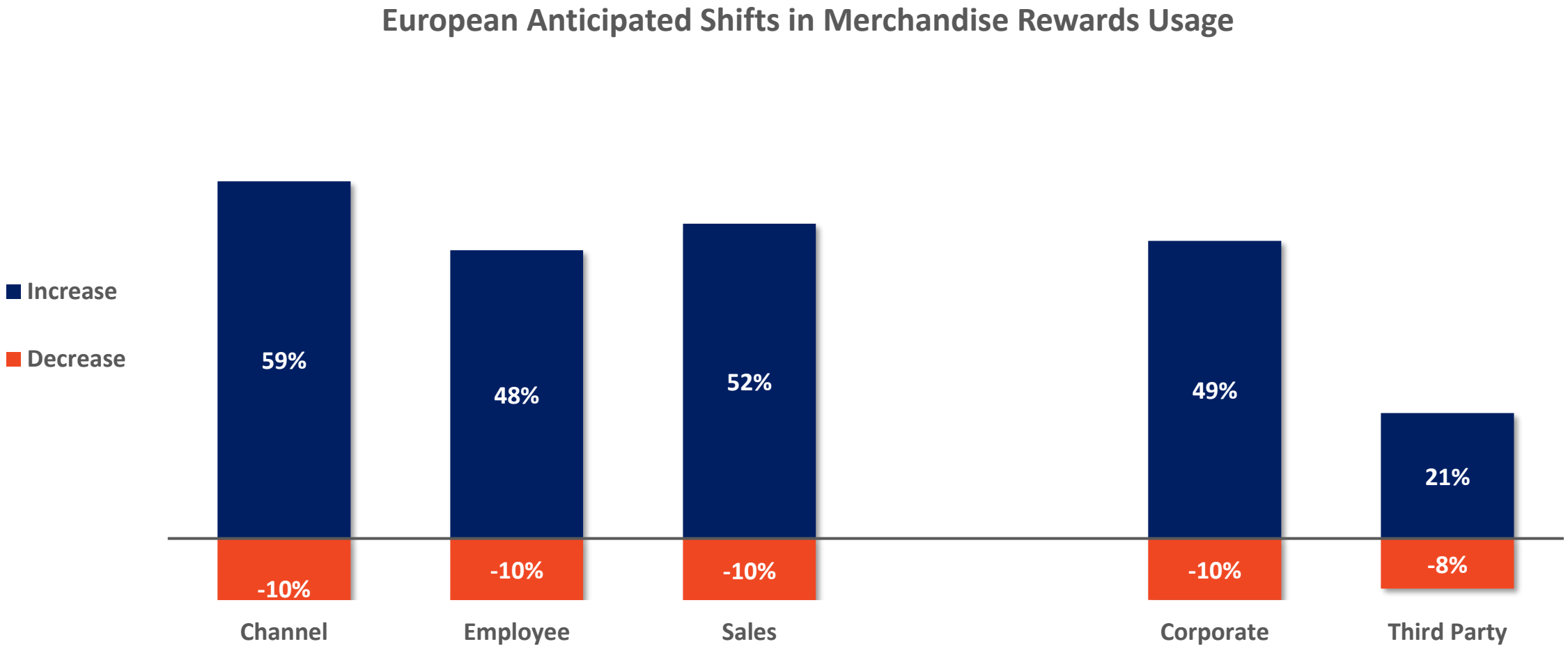
North American organizations generally expect an increase in merchandise rewards usage, lead by third parties



Q19: In the coming year, do you generally anticipate use of the following reward types will increase, decrease, or remain unchanged?

Anticipated Shifts in Merchandise Rewards

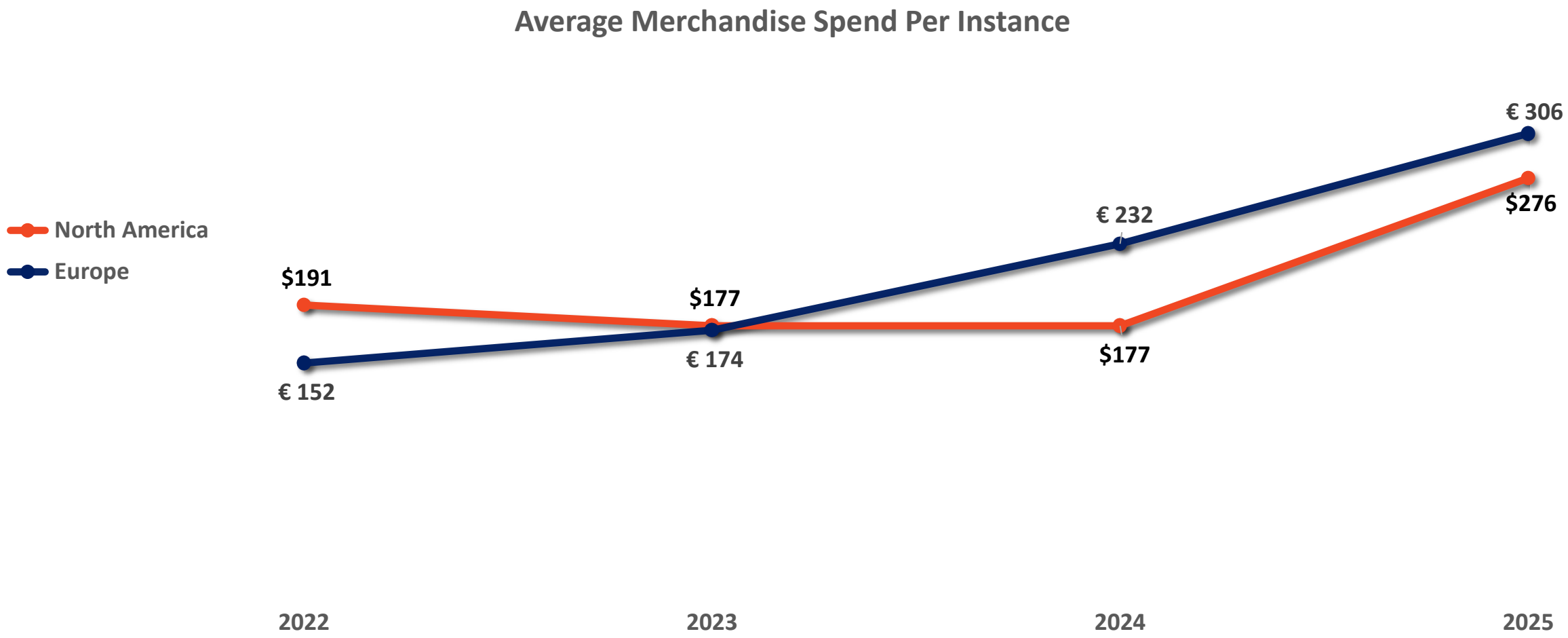
Europeans also expect an increase in merchandise rewards, though less pronounced, and lead by corporations



Q19: In the coming year, do you generally anticipate use of the following reward types will increase, decrease, or remain unchanged?

Merchandise Reward Value

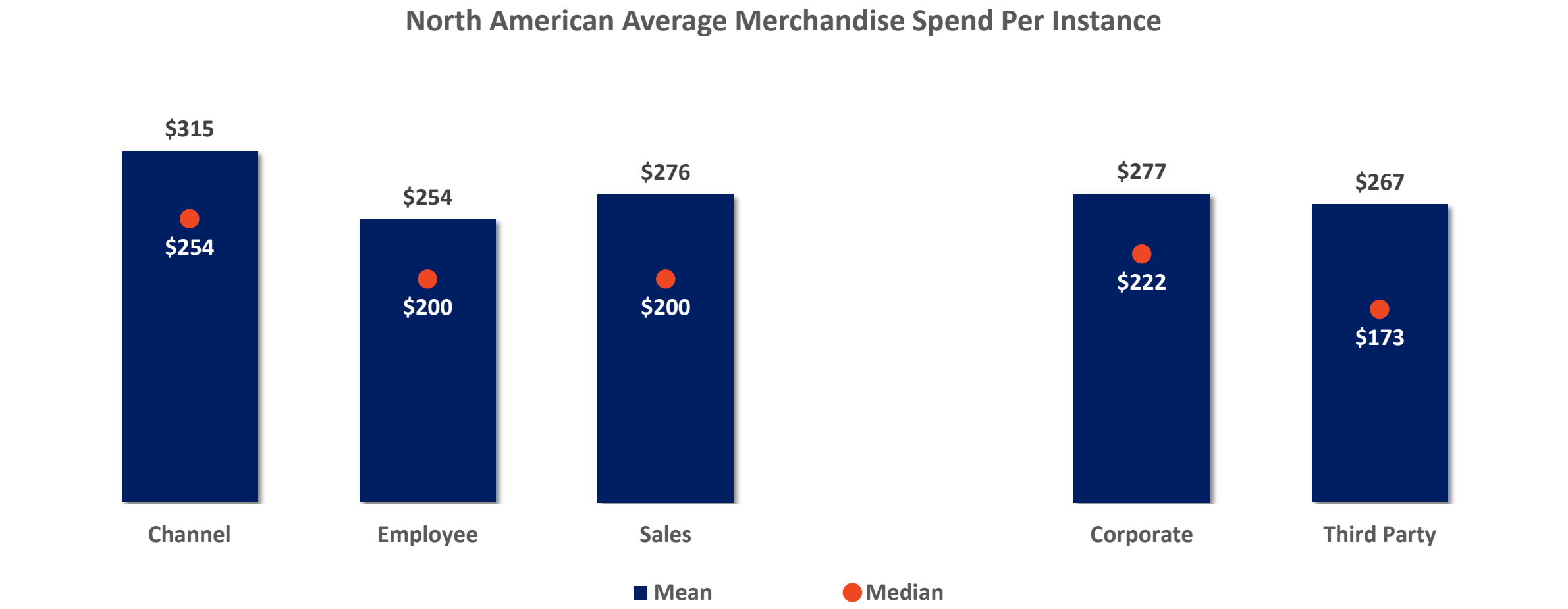
Per reward spending on merchandise is increasing sharply in North America and consistently in Europe



Q43: What is the average merchandise spend per instance for reward/recognition in your [channel/employe/sales] program?

Merchandise Reward Value

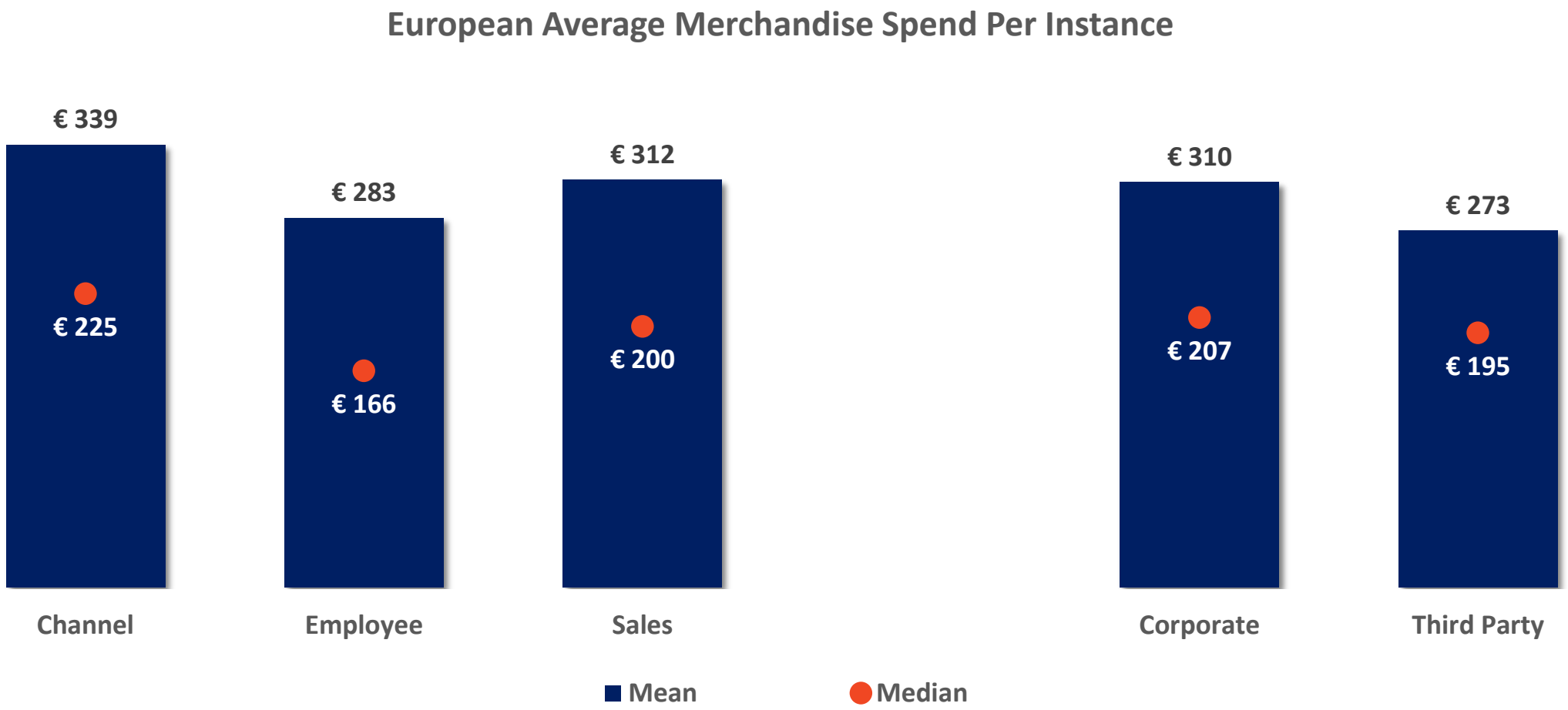
In North America, channel programs spend more per reward on merchandise than others



Q43: What is the average merchandise spend per instance for reward/recognition in your [channel/employe/sales] program?

Merchandise Reward Value

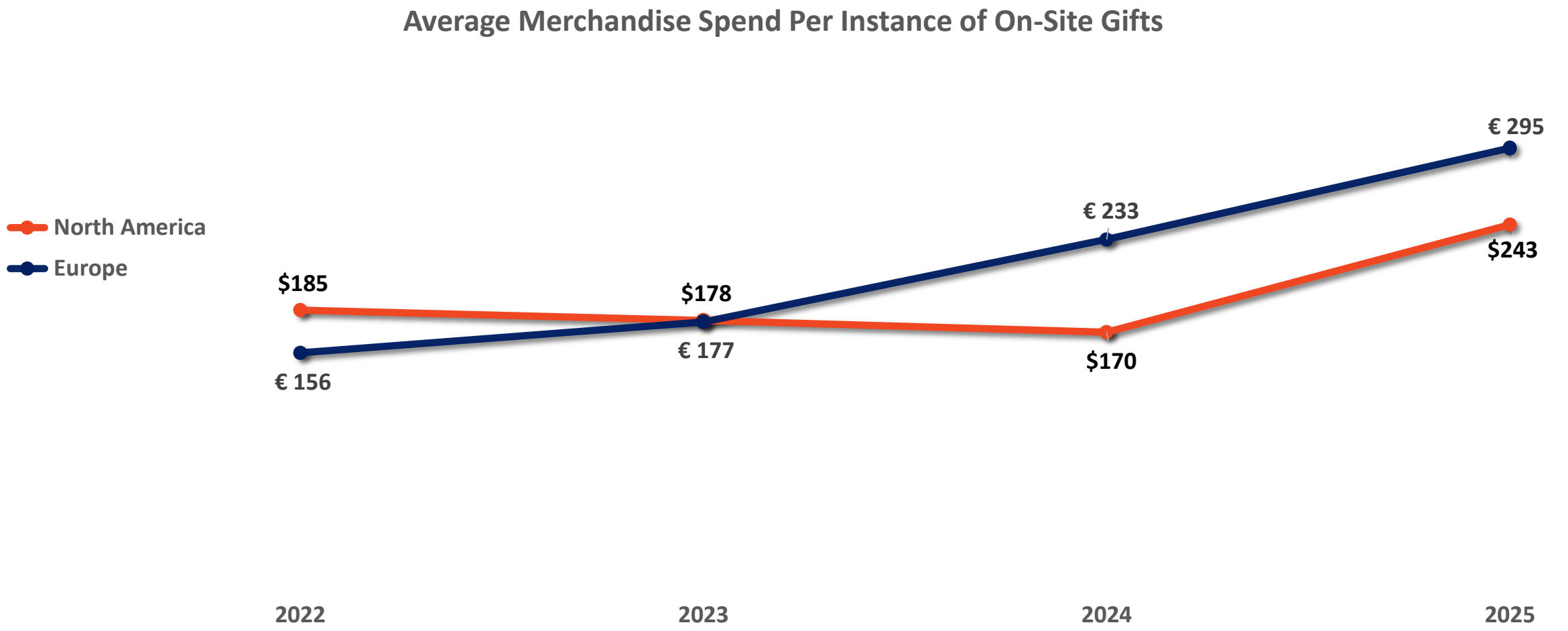
European corporations spend more per reward on merchandise, particularly for channel and sales programs



Q43: What is the average merchandise spend per instance for reward/recognition in your [channel/employe/sales] program?

Merchandise Spend – Event Gifting

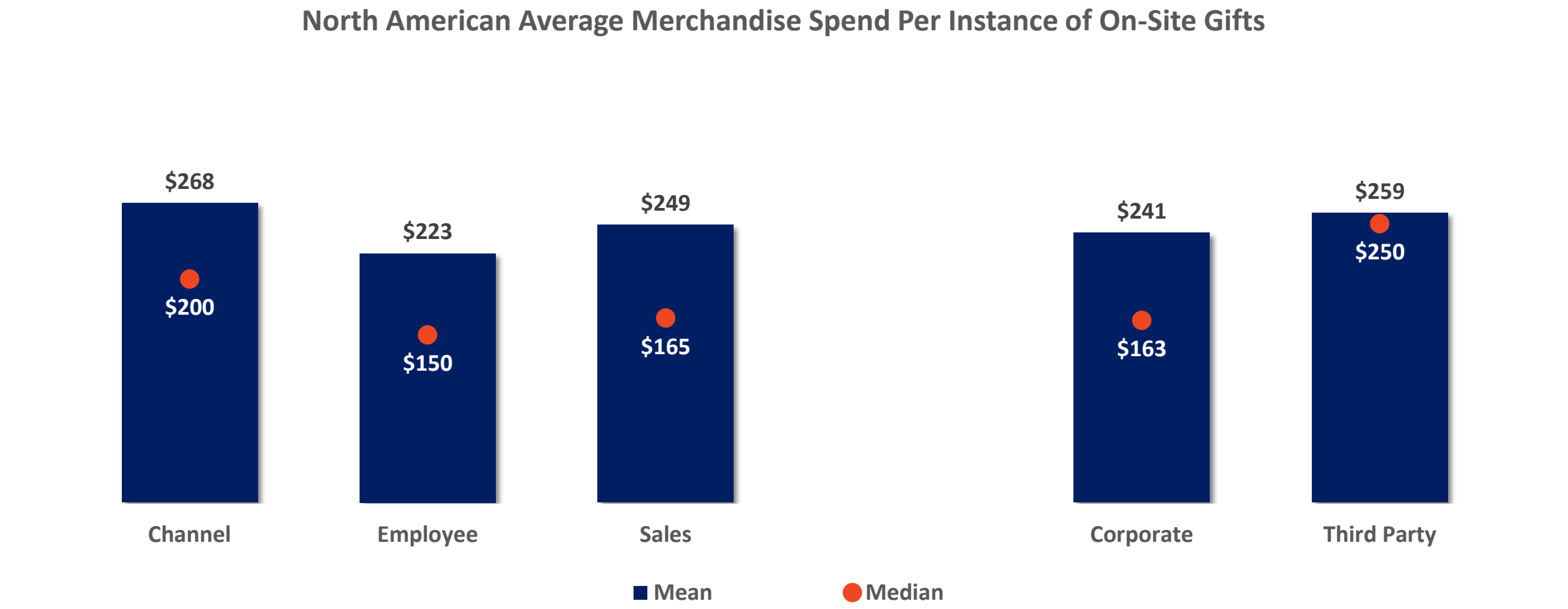
Per reward spending on merchandise for on-site gifts is increasing rapidly in North American and steadily in Europe



Q34: What is the average merchandise spend per instance for on-site gifting in your [channel/sales/employee] program?

Merchandise Spend – Event Gifting

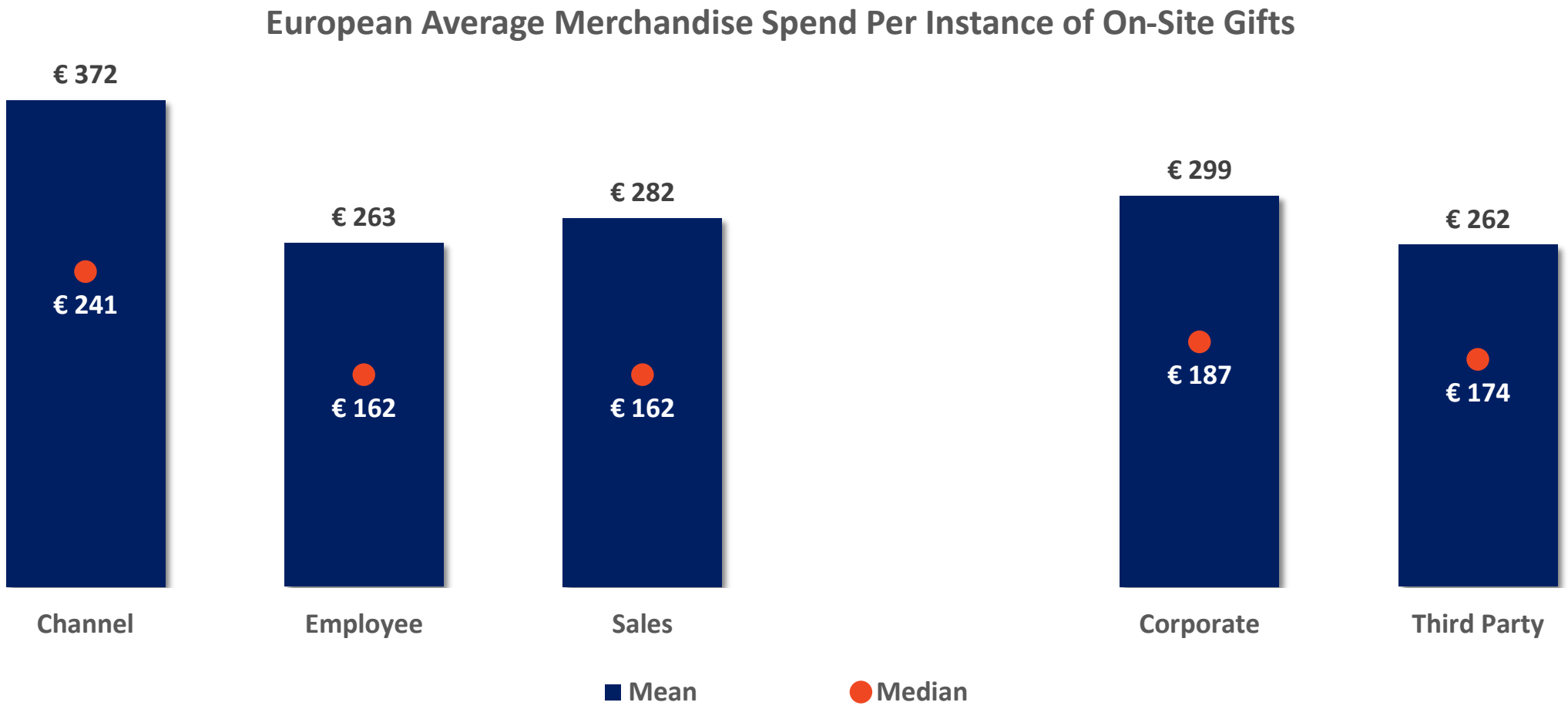
Merchandise reward value shows minimal variation across North American organizations and programs



Q34: What is the average merchandise spend per instance for on-site gifting in your [channel/sales/employee] program?

Merchandise Spend – Event Gifting

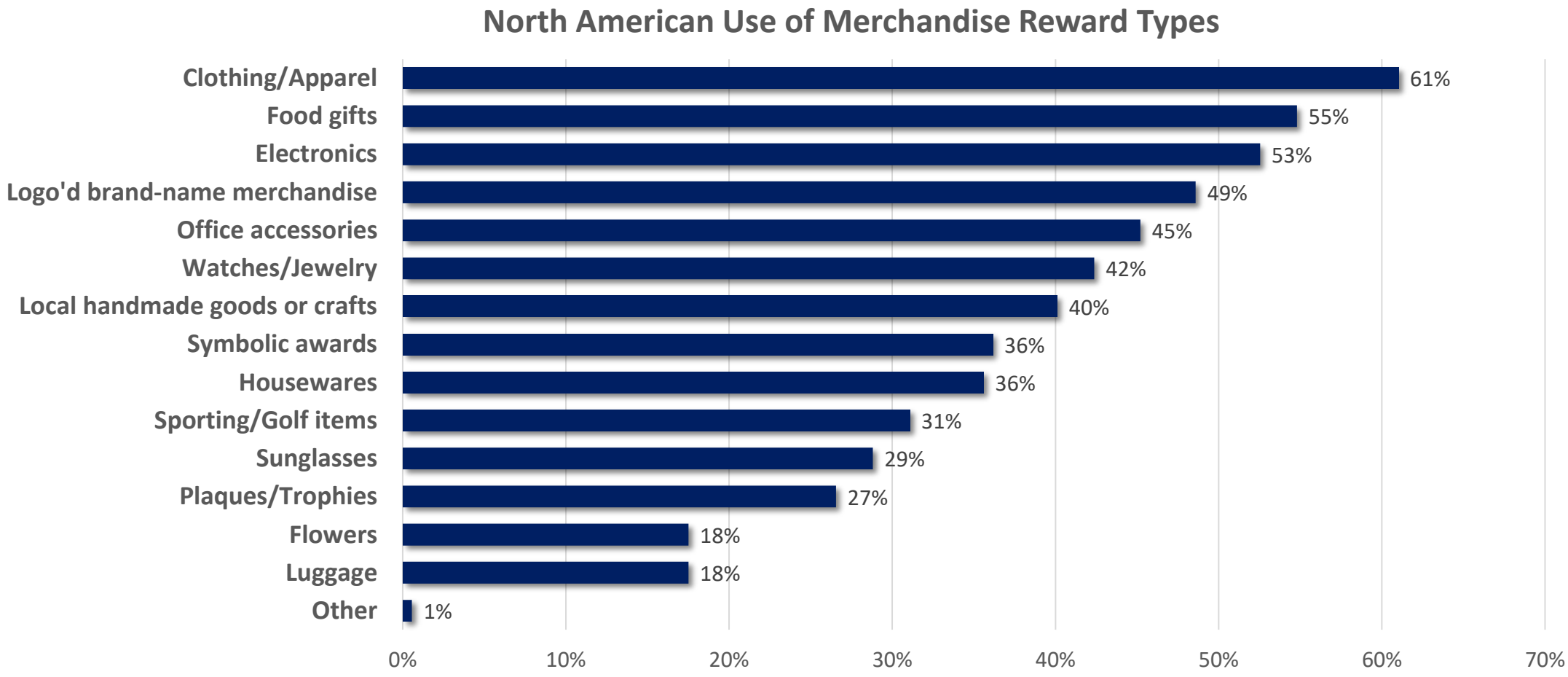
On-site merchandise reward value is significantly higher for channel programs than others in Europe



Q34: What is the average merchandise spend per instance for on-site gifting in your [channel/sales/employee] program?

Merchandise Reward Type Prevalence

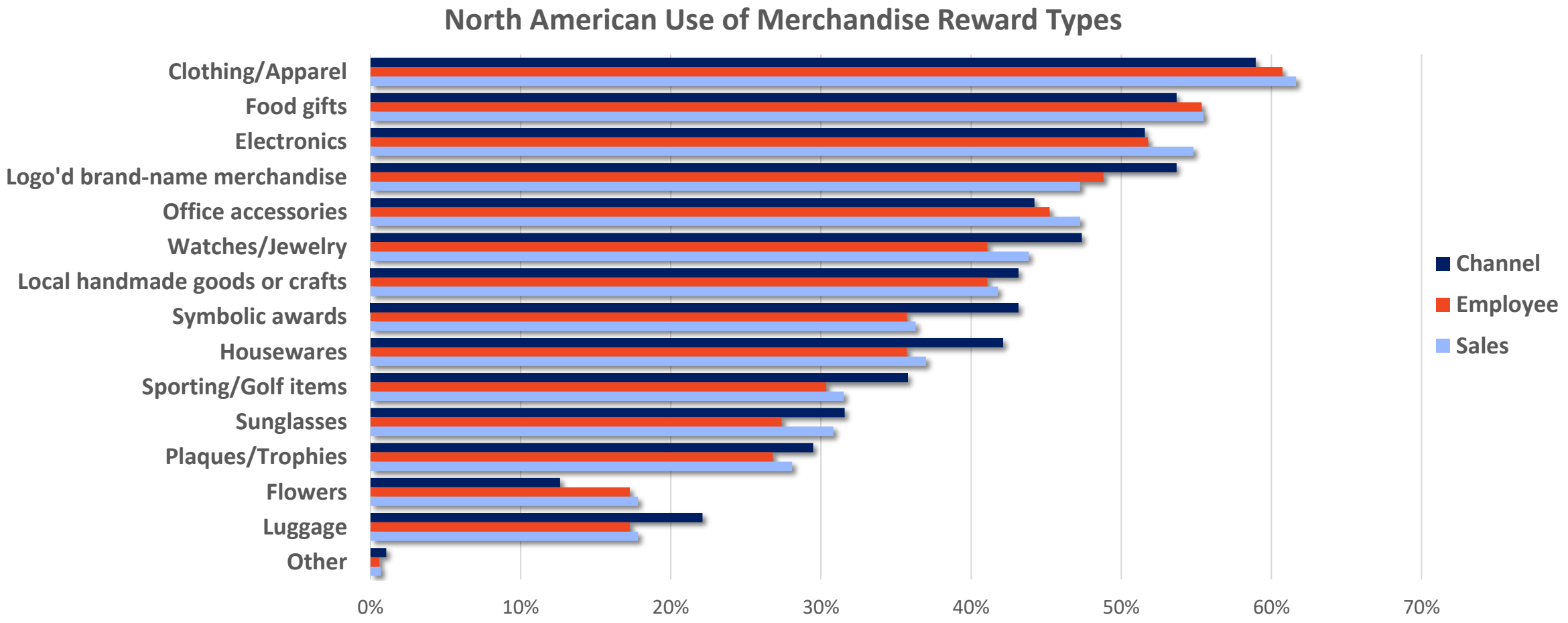
North American organizations favor the use of apparel, food gifts, and electronics for rewards



Q42: Which of the types of merchandise listed below, do you use for your non-cash rewards programs?

Merchandise Reward Type Prevalence

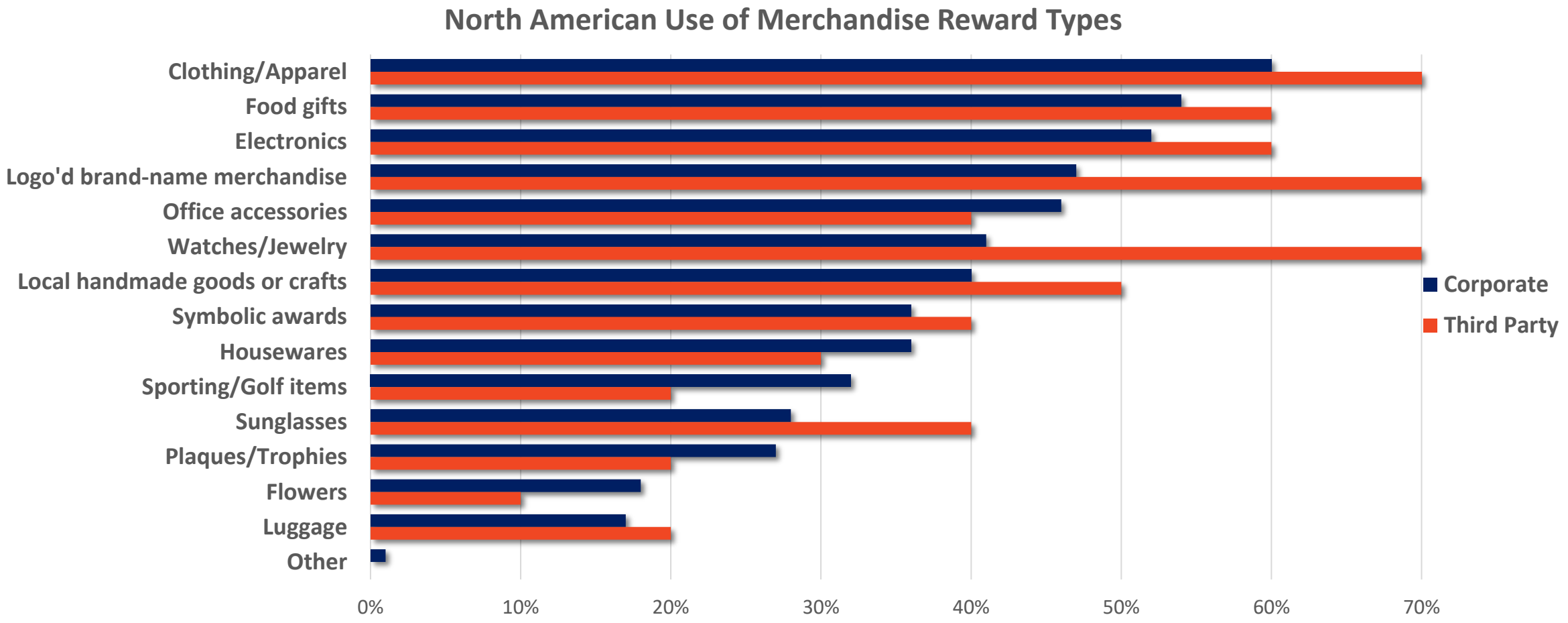
North American channel programs provide a wider array of merchandise rewards



Q42: Which of the types of merchandise listed below, do you use for your non-cash rewards programs?

Merchandise Reward Type Prevalence

North American third parties emphasize premium and branded merchandise



Q42: Which of the types of merchandise listed below, do you use for your non-cash rewards programs?

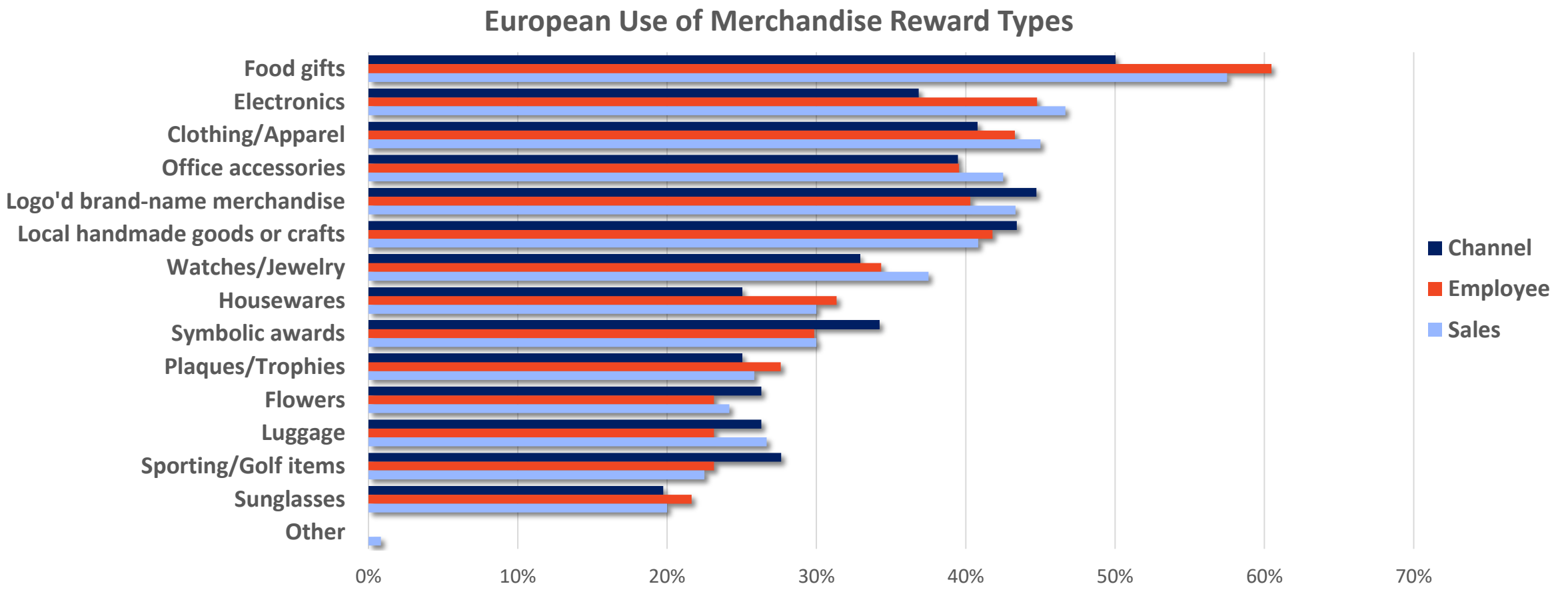
Merchandise Reward Type Prevalence

Europeans favor food gifts as merchandise rewards, followed by electronics, apparel, and office accessories

Q42: Which of the types of merchandise listed below, do you use for your non-cash rewards programs?

Merchandise Reward Type Prevalence

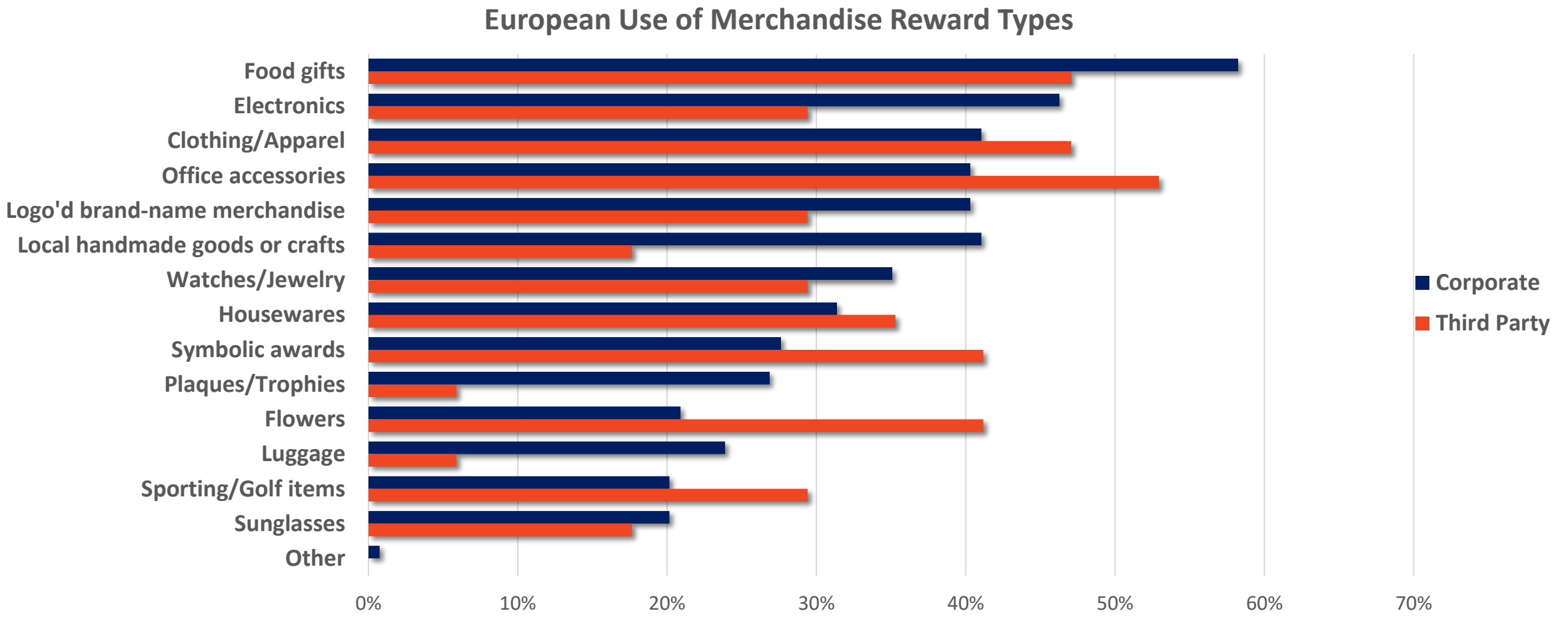
In Europe, channel programs offer the widest merchandise rewards mix, while sales and employee programs favor premium items



Q42: Which of the types of merchandise listed below, do you use for your non-cash rewards programs?

Merchandise Reward Type Prevalence

European corporations favor food and local gifts, while third parties emphasize formal and symbolic rewards

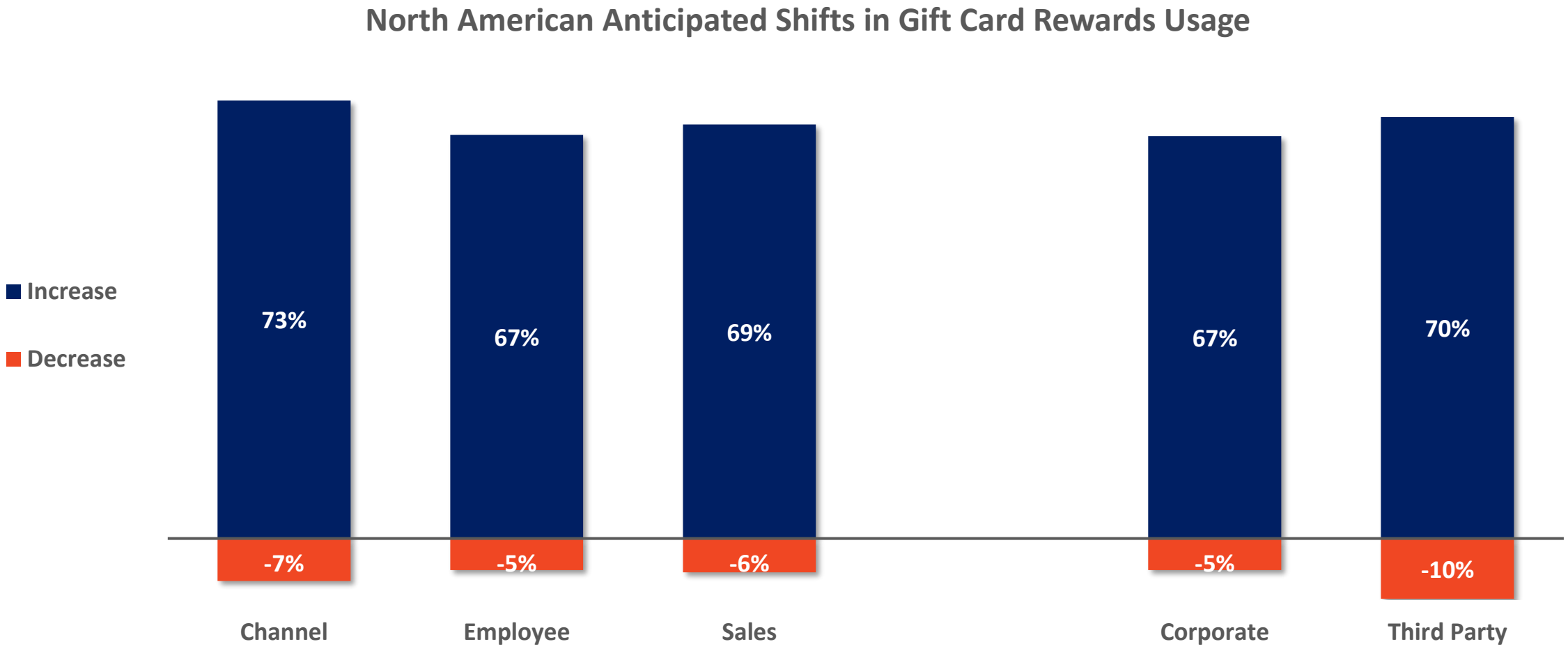


Q42: Which of the types of merchandise listed below, do you use for your non-cash rewards programs?

Gift Card Rewards

Anticipated Shifts in Gift Card Rewards

North Americans predict a strong increase in gift card reward usage in the coming year



Q19: In the coming year, do you generally anticipate use of the following reward types will increase, decrease, or remain unchanged?

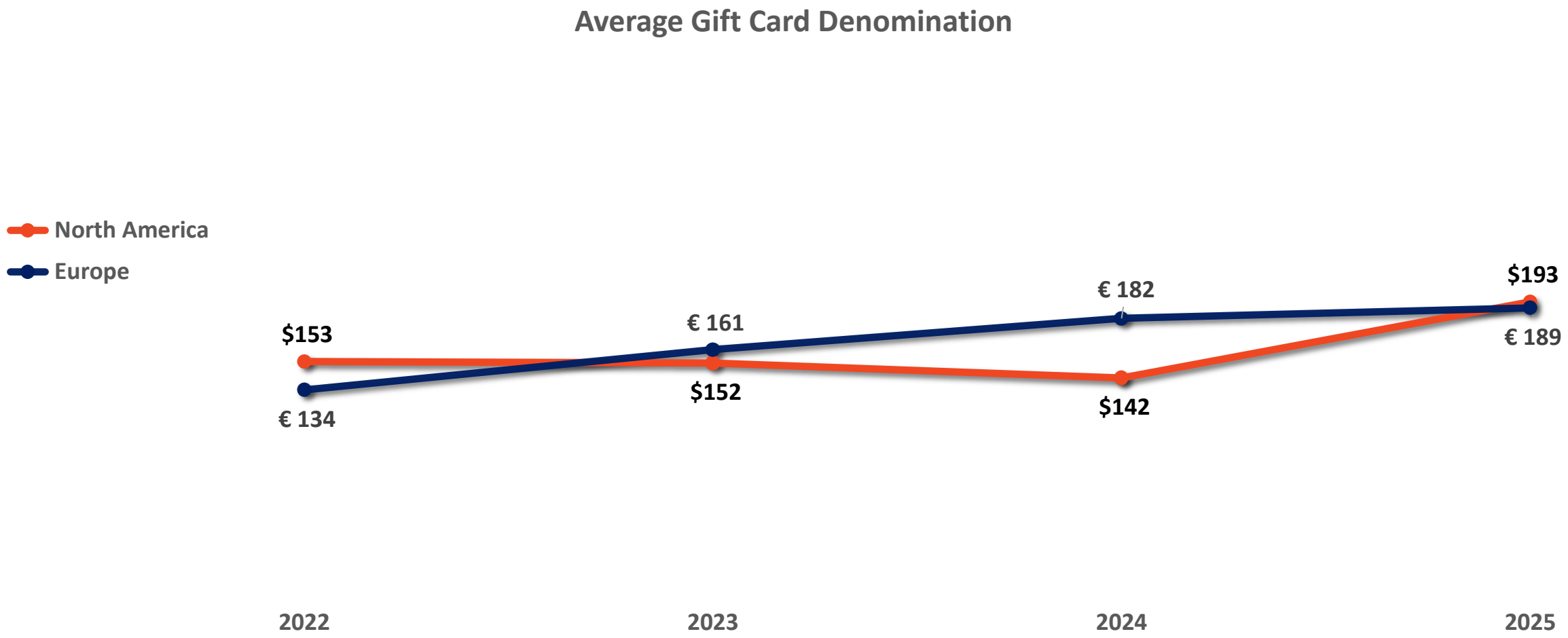
Anticipated Shifts in Gift Card Rewards

Europeans also forecast an increase in gift card rewards usage in the coming year

Q19: In the coming year, do you generally anticipate use of the following reward types will increase, decrease, or remain unchanged?

Gift Card Reward Value

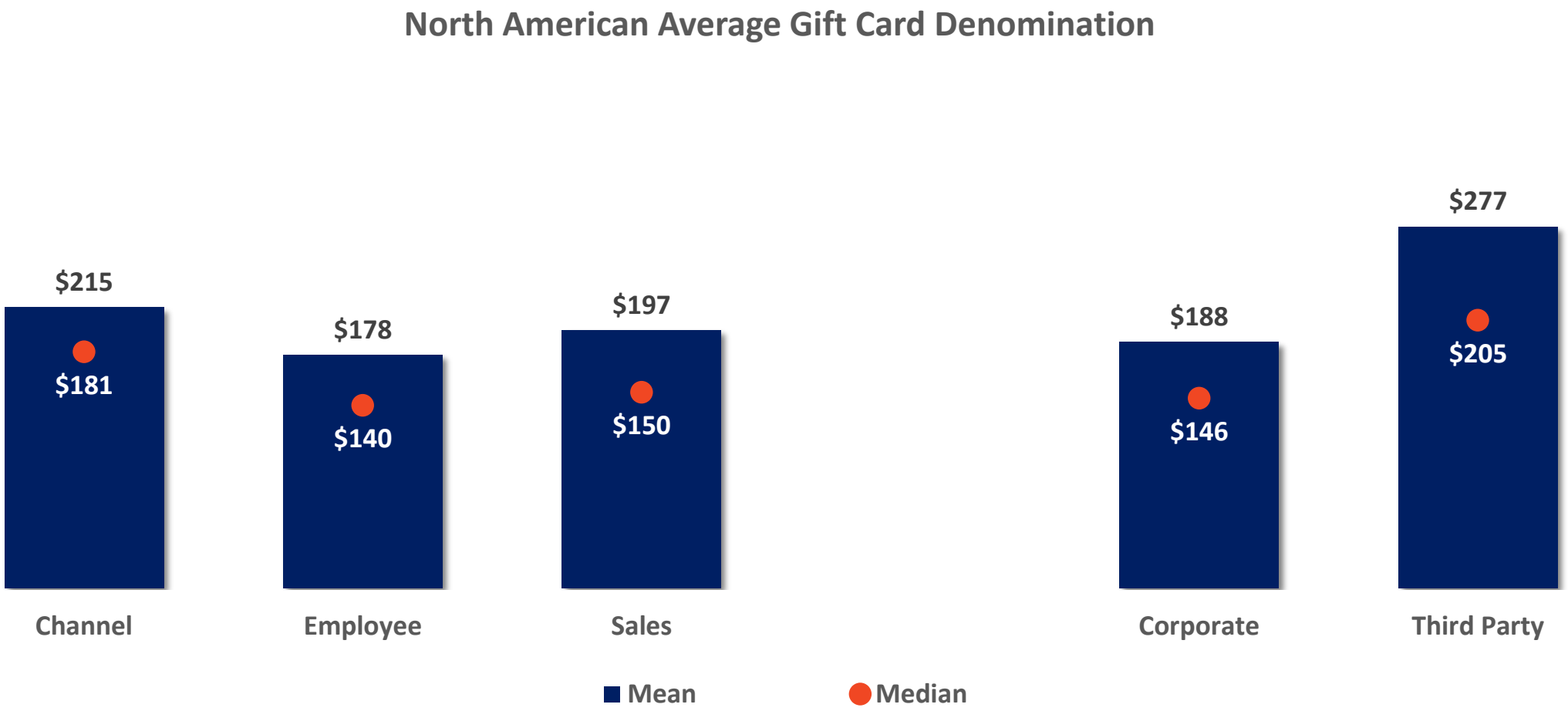
Average gift card values are rising in North America but remain steady in Europe



Q48: What is the average gift card denomination/value you distribute to recipients in your [channel/employee/sales] program?

Gift Card Reward Value

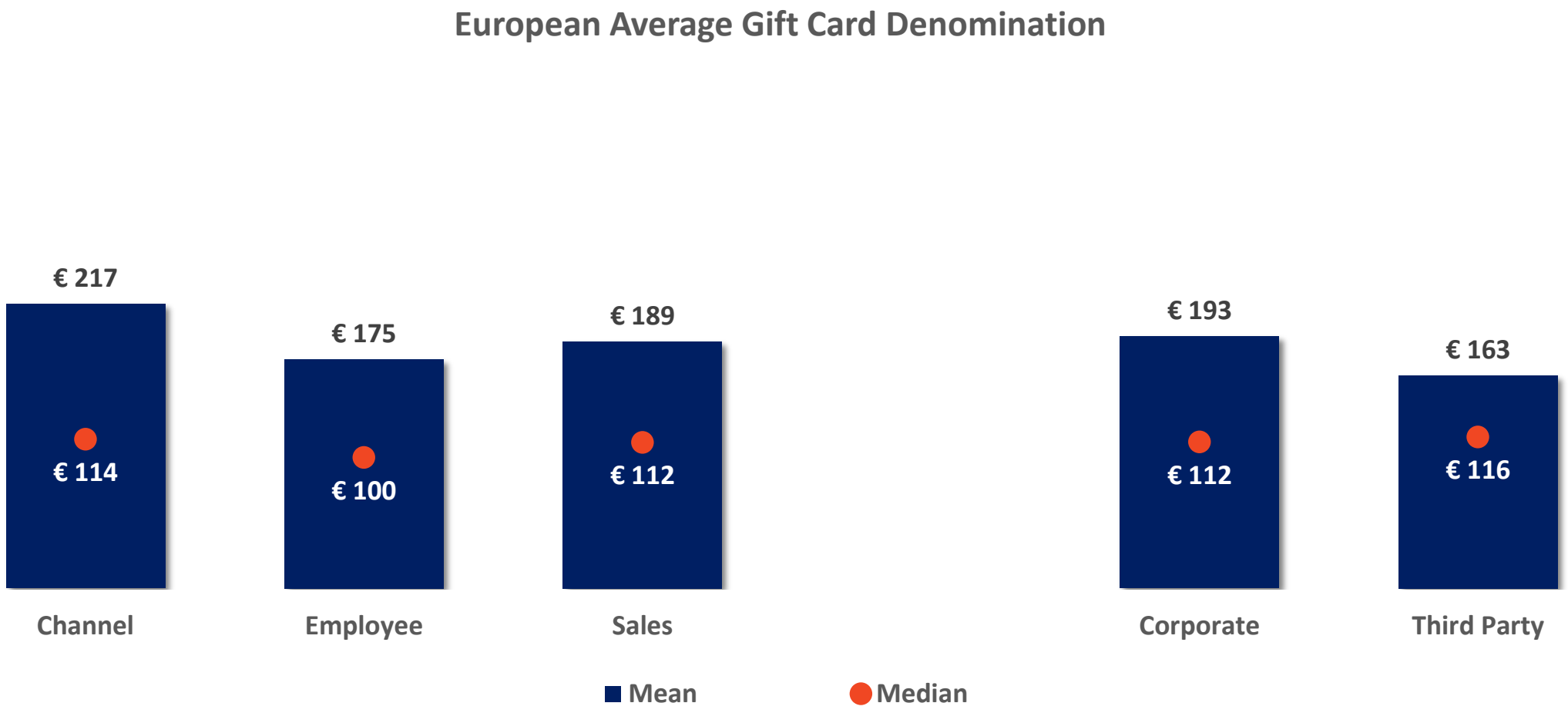
Gift card spending is highest among third-party organizations in North America



Q48: What is the average gift card denomination/value you distribute to recipients in your [channel/employee/sales] program?

Gift Card Reward Value

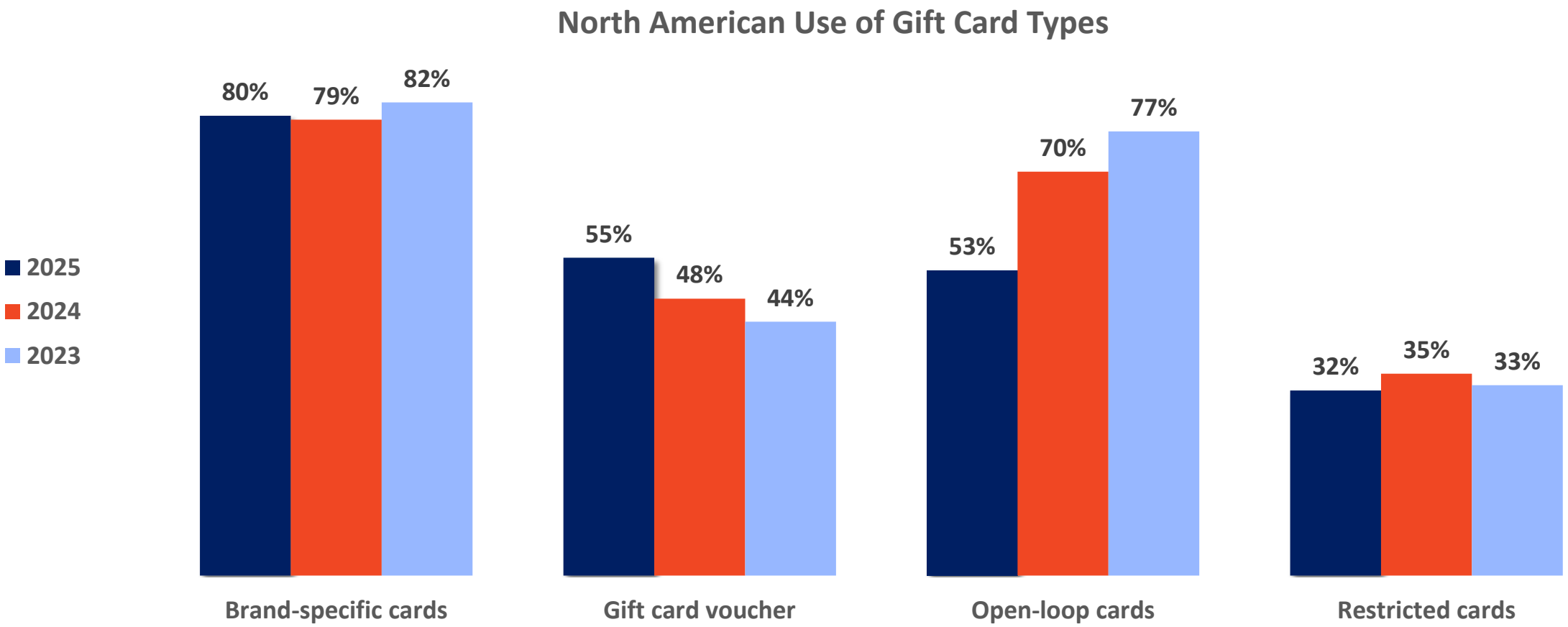
Average gift card values are slightly higher in channel programs and corporate entities



Q48: What is the average gift card denomination/value you distribute to recipients in your [channel/employee/sales] program?

Gift Card Type Prevalence

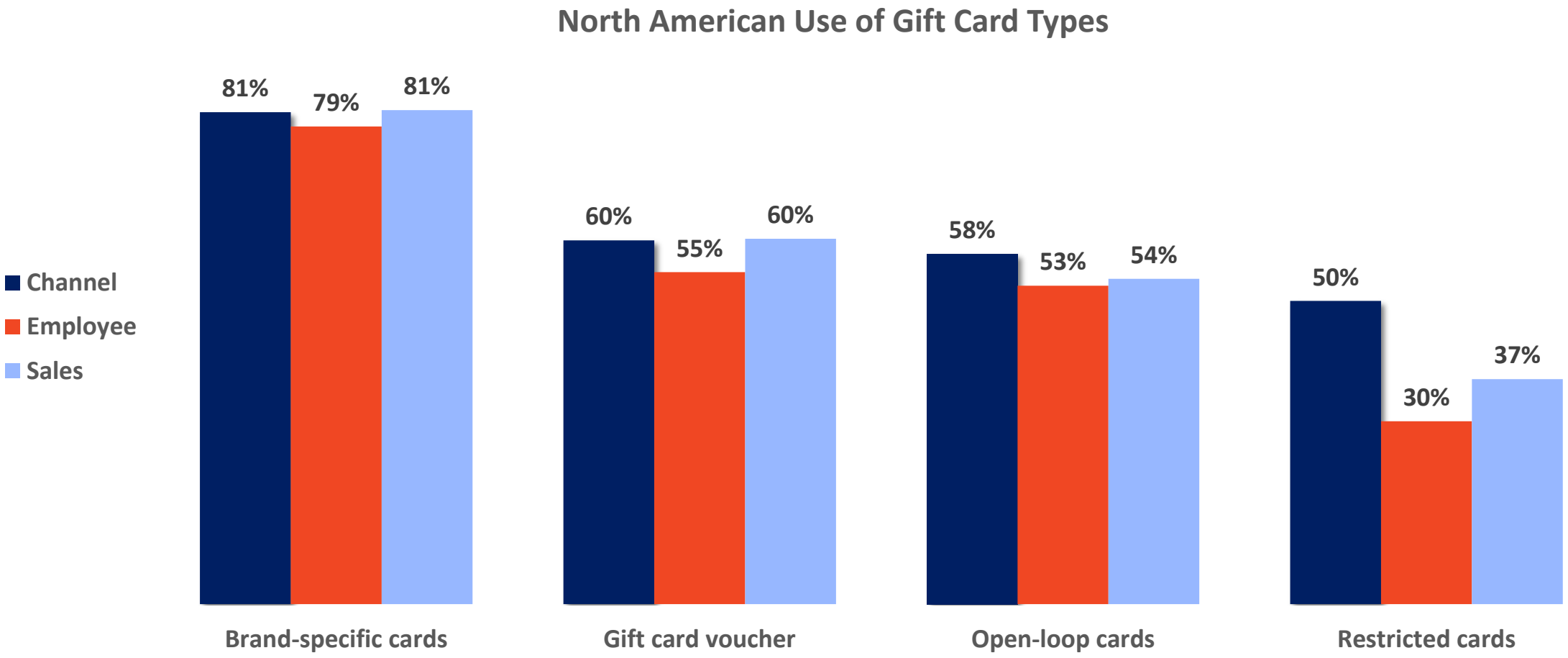
Brand-specific gift cards remain the most prevalent in North America, while open-loop cards continue to reduce in popularity



Q44: Which types of gift cards does your company use in its non-cash reward programs?

Gift Card Type Prevalence

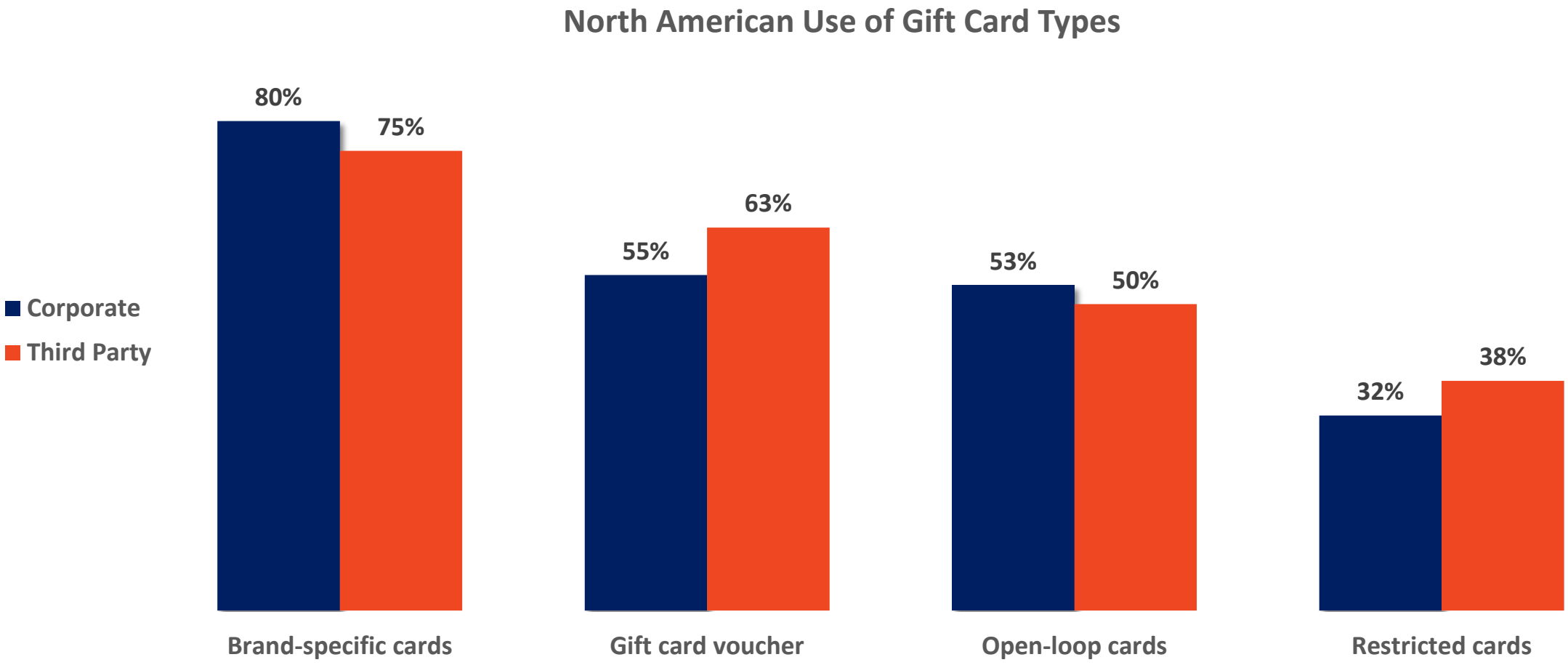
Restricted gift card use is most common in North American channel programs



Q44: Which types of gift cards does your company use in its non-cash reward programs?

Gift Card Type Prevalence

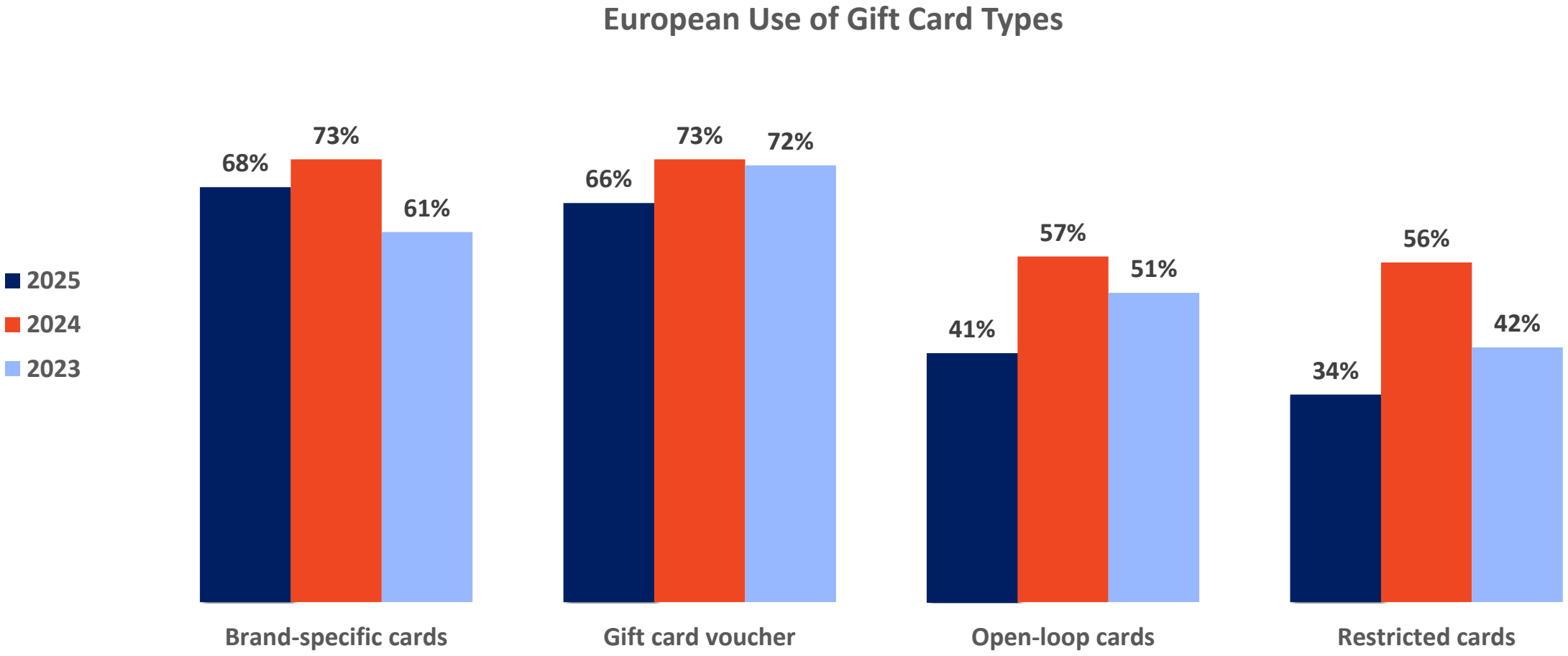
Gift card usage is relatively consistent across North American corporate entities and third parties



Q44: Which types of gift cards does your company use in its non-cash reward programs?

Gift Card Type Prevalence

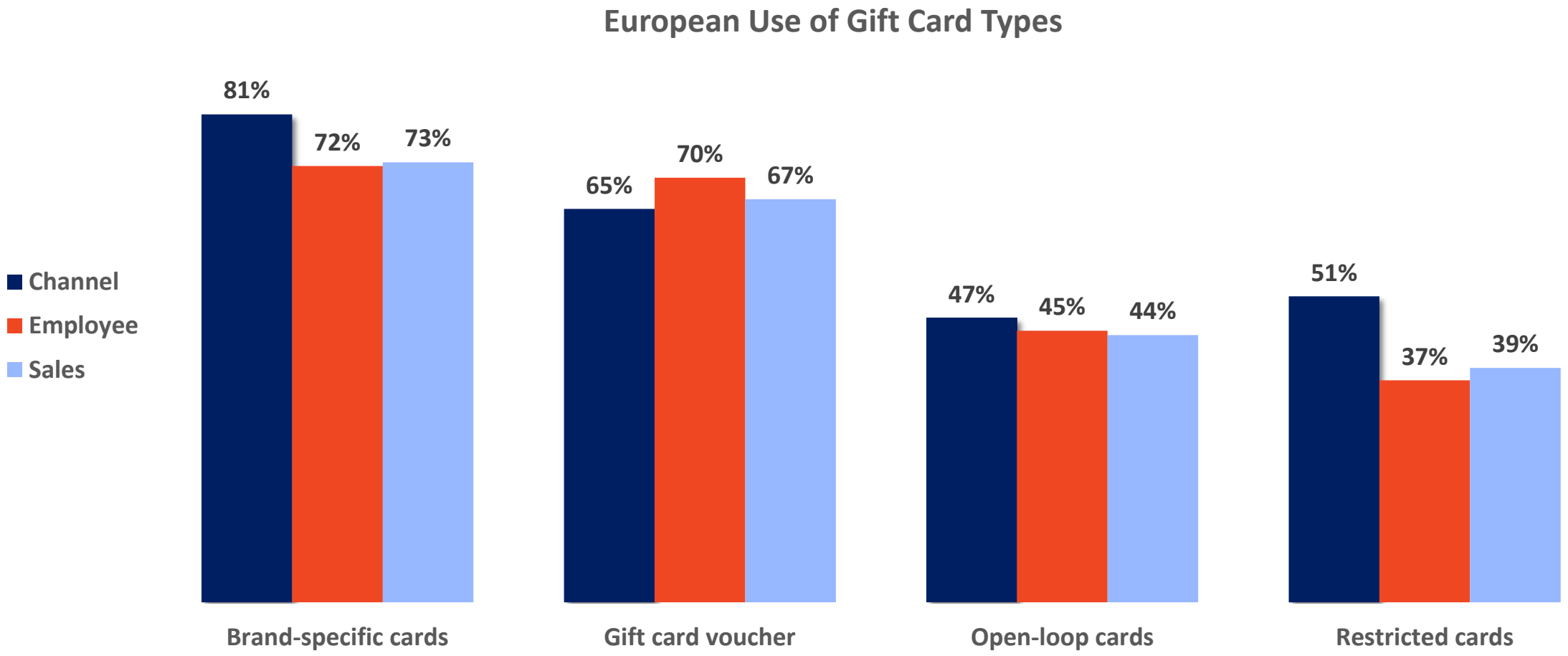
The use of open-loop and restricted gift cards are declining in European reward programs



Q44: Which types of gift cards does your company use in its non-cash reward programs?

Gift Card Type Prevalence

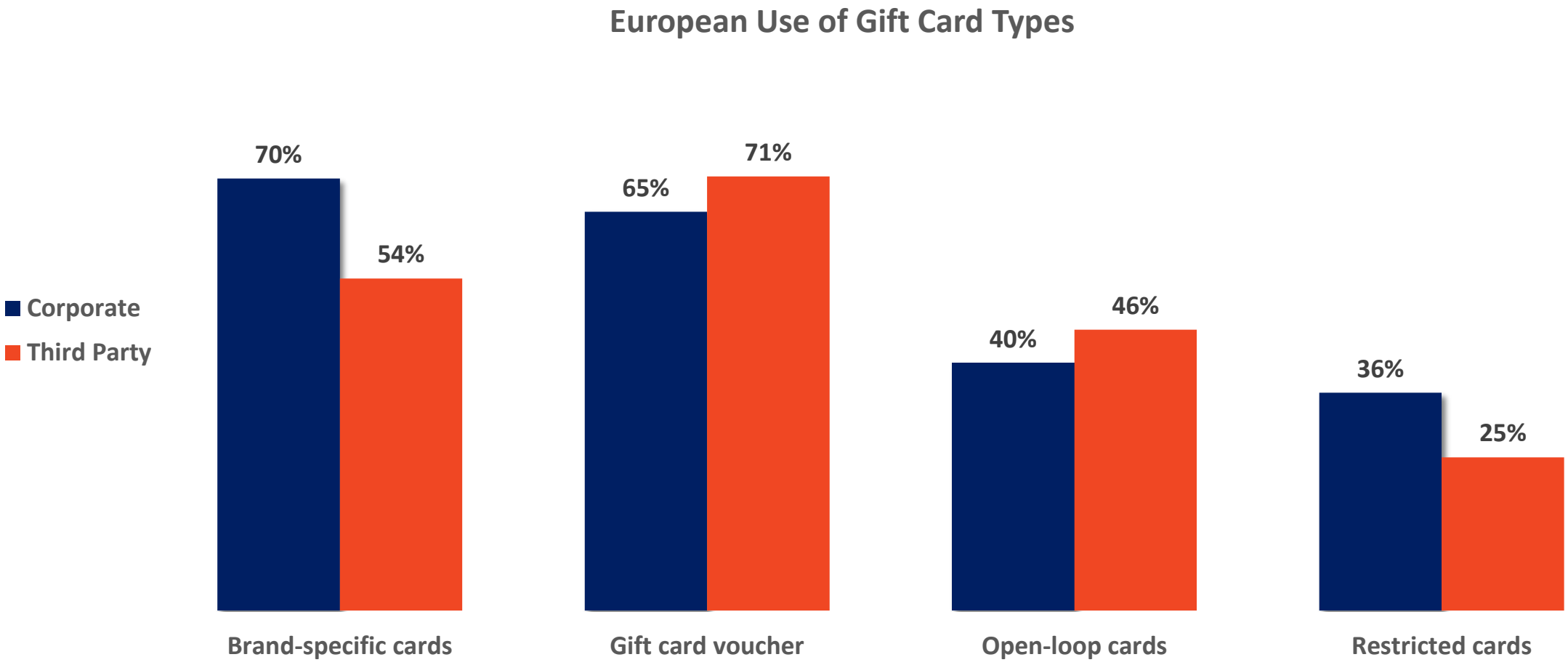
European channel programs lead in the use of brand-specific and restricted gift cards



Q44: Which types of gift cards does your company use in its non-cash reward programs?

Gift Card Type Prevalence

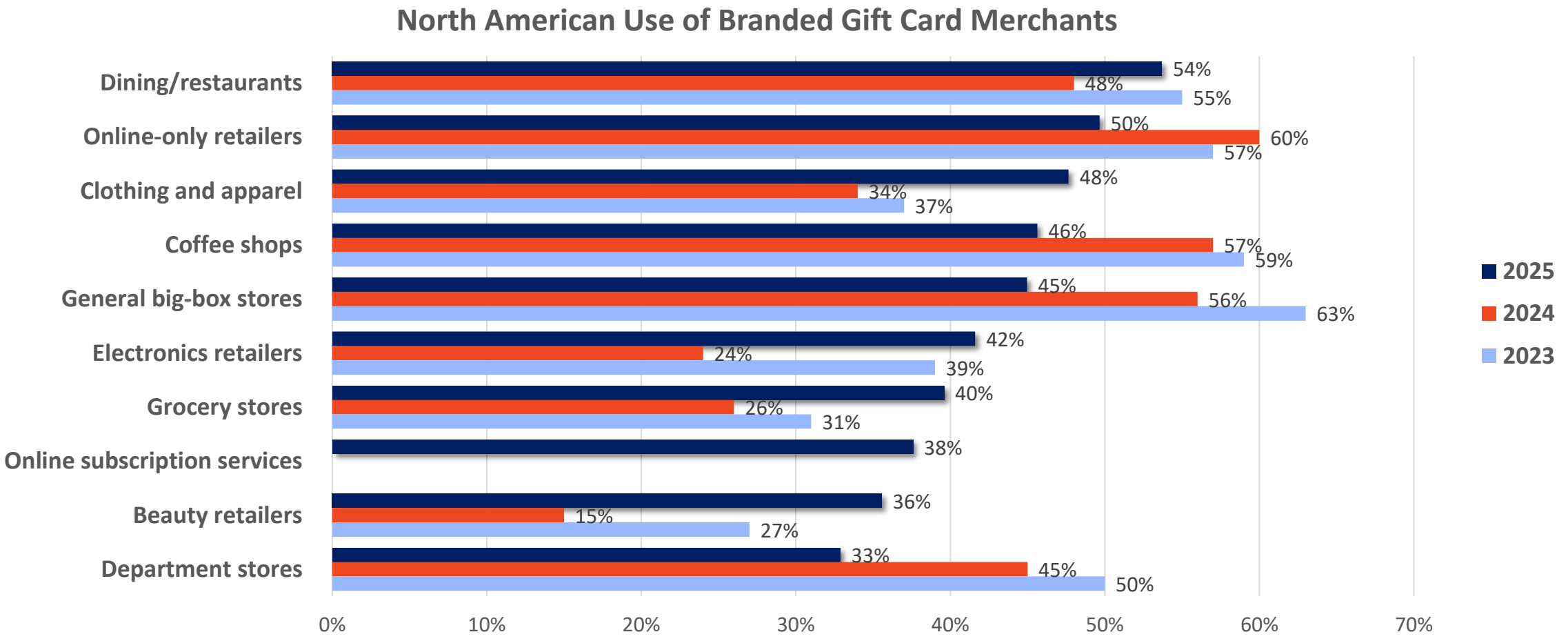
European corporations are most likely to use brand-specific and restricted gift cards



Q44: Which types of gift cards does your company use in its non-cash reward programs?

Branded Gift Card Merchants

Dining and apparel gift cards rise in popularity, becoming the most and third-most popular in North America

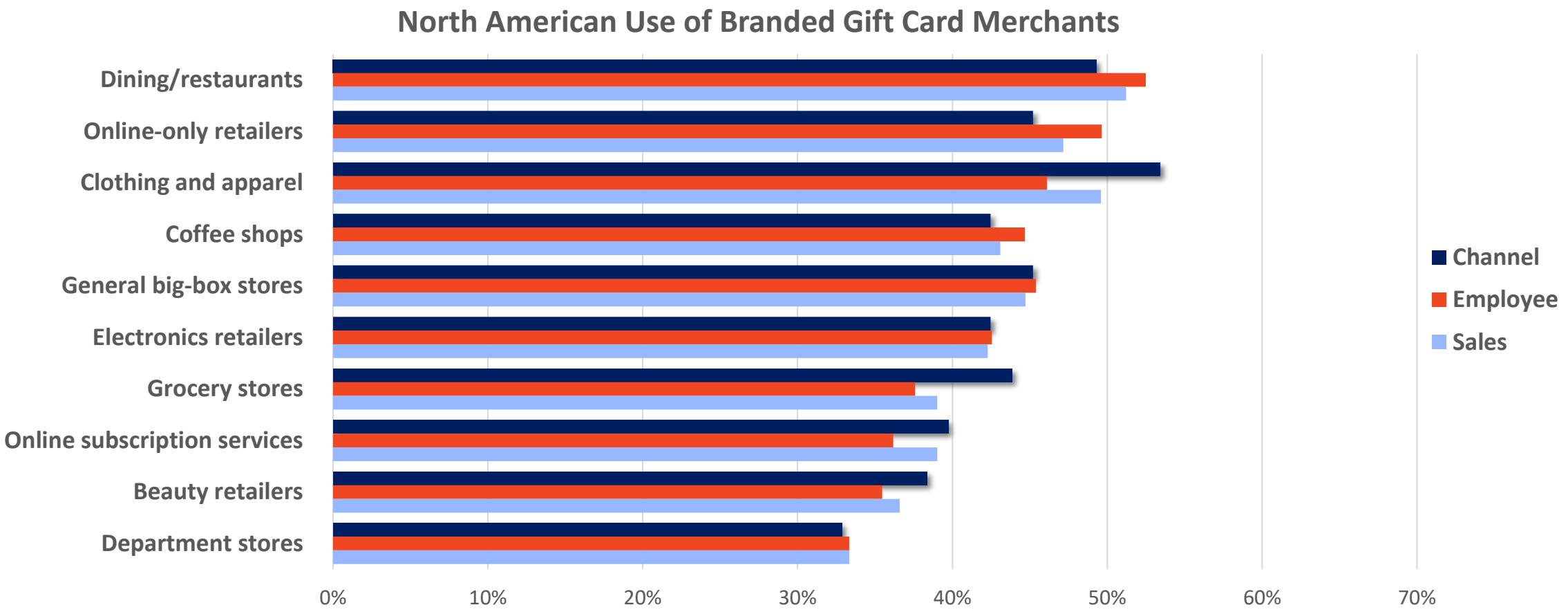


Q45: Which of the options below best describes the types of merchants selected when your company buys BRANDED gift cards for your non-cash rewards programs?

Top 10 selections – a full table of all branded gift card merchants can be found in the Appendix

Branded Gift Card Merchants

North American channel programs favor tangible rewards, employee programs emphasize experiences, and sales programs use a balanced mix

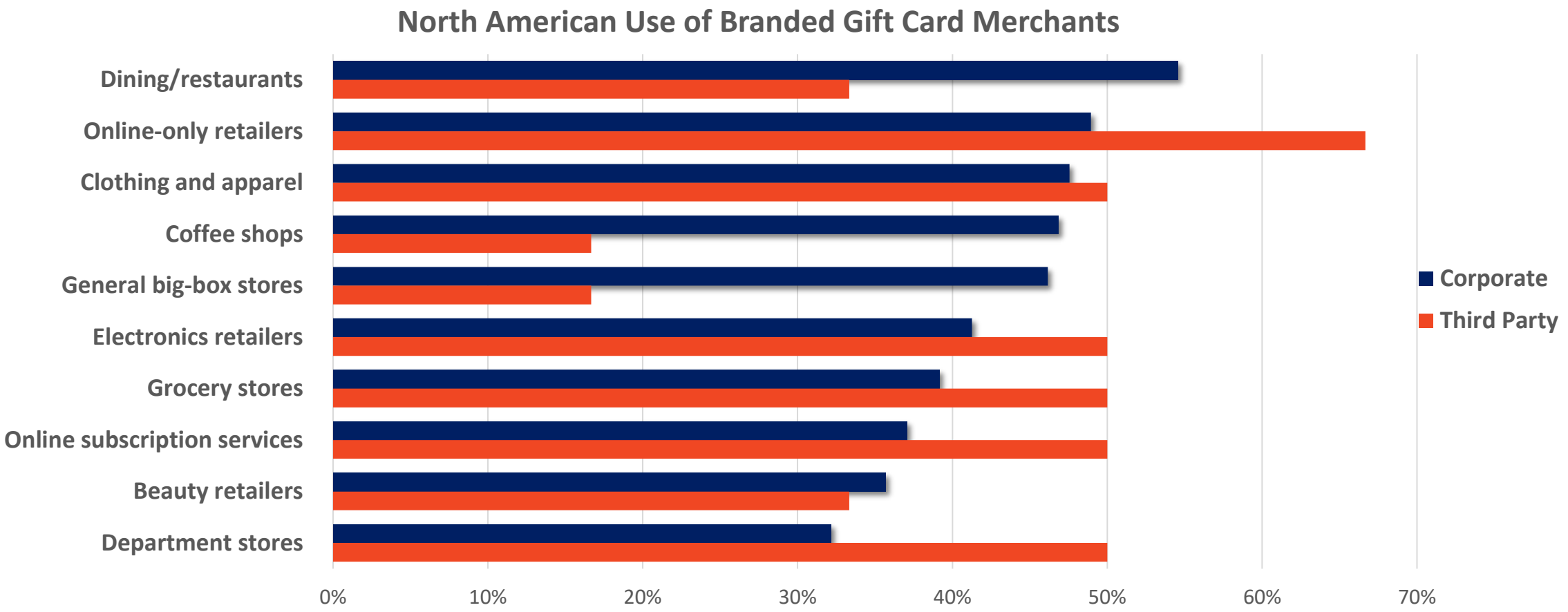


Q45: Which of the options below best describes the types of merchants selected when your company buys BRANDED gift cards for your non-cash rewards programs?

Top 10 selections – a full table of all branded gift card merchants can be found in the Appendix

Branded Gift Card Merchants

North American corporations favor in-person and traditional retail gift cards, while third parties emphasize online and flexible options

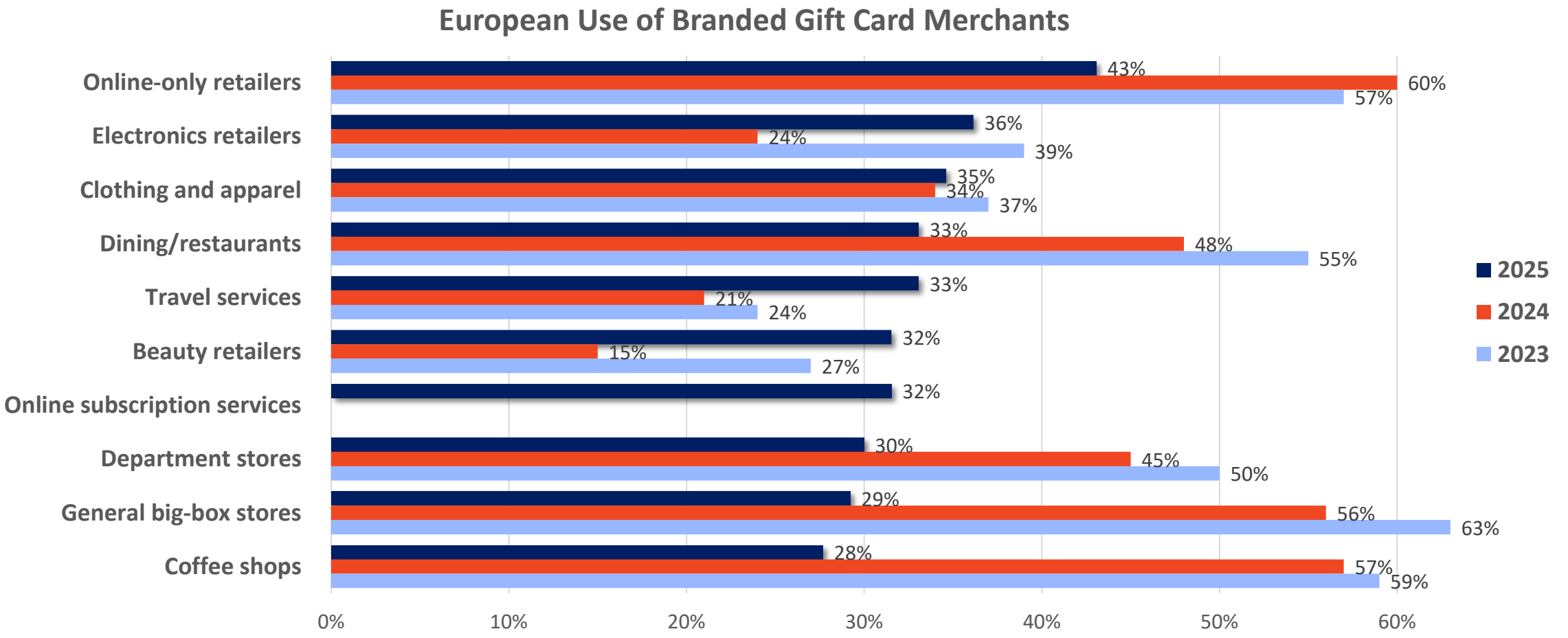


Q45: Which of the options below best describes the types of merchants selected when your company buys BRANDED gift cards for your non-cash rewards programs?

Top 10 selections – a full table of all branded gift card merchants can be found in the Appendix

Branded Gift Card Merchants

Dramatic shifts place online and electronic retailers atop European branded gift card merchants

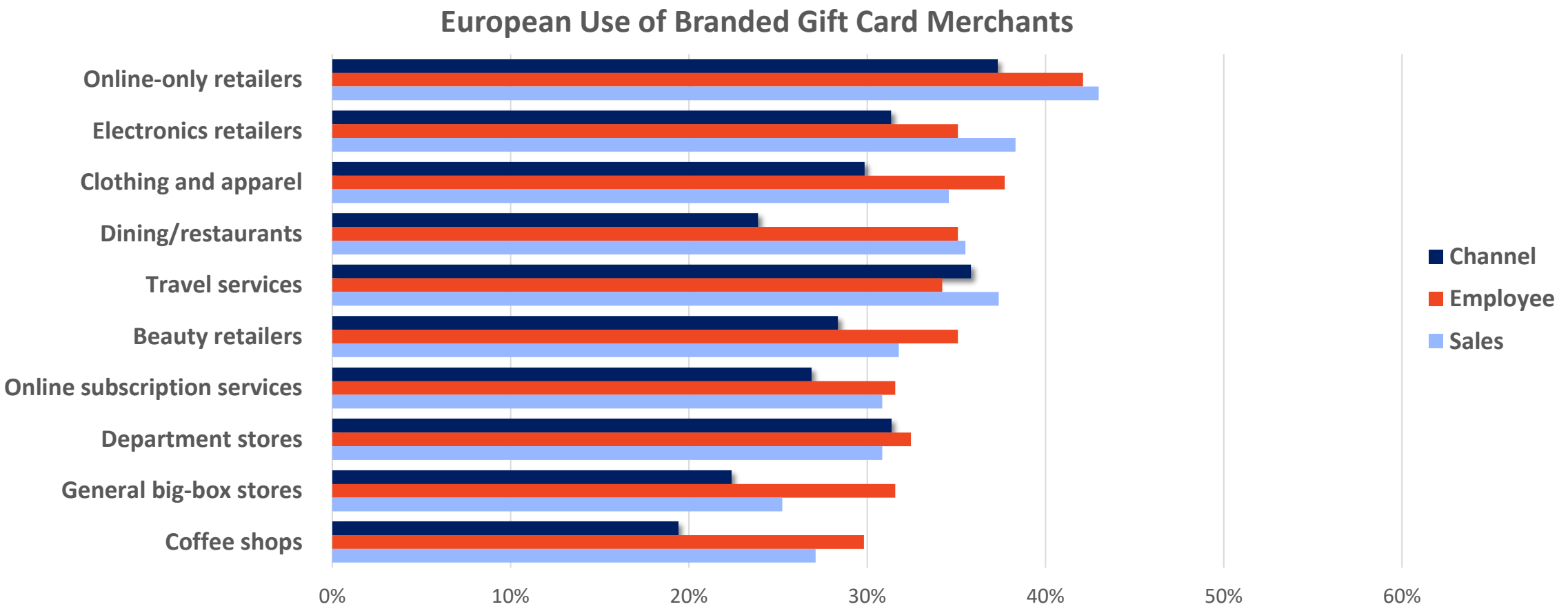


Q45: Which of the options below best describes the types of merchants selected when your company buys BRANDED gift cards for your non-cash rewards programs?

Top 10 selections – a full table of all branded gift card merchants can be found in the Appendix

Branded Gift Card Merchants

European employee and sales programs employ a more diverse mix of branded gift card merchants and channel programs

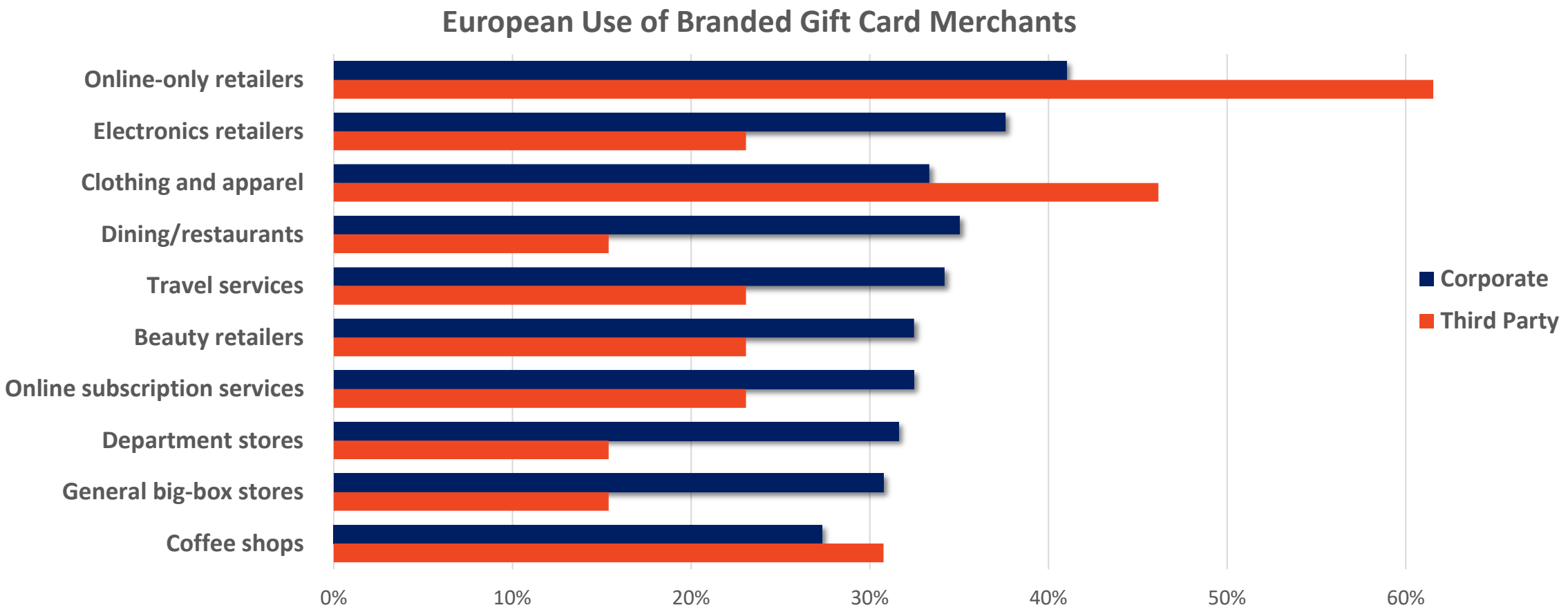


Q45: Which of the options below best describes the types of merchants selected when your company buys BRANDED gift cards for your non-cash rewards programs?

Top 10 selections – a full table of all branded gift card merchants can be found in the Appendix

Branded Gift Card Merchants

European corporate programs offer a broad mix of branded gift card options, while third parties emphasize online retailers and apparel

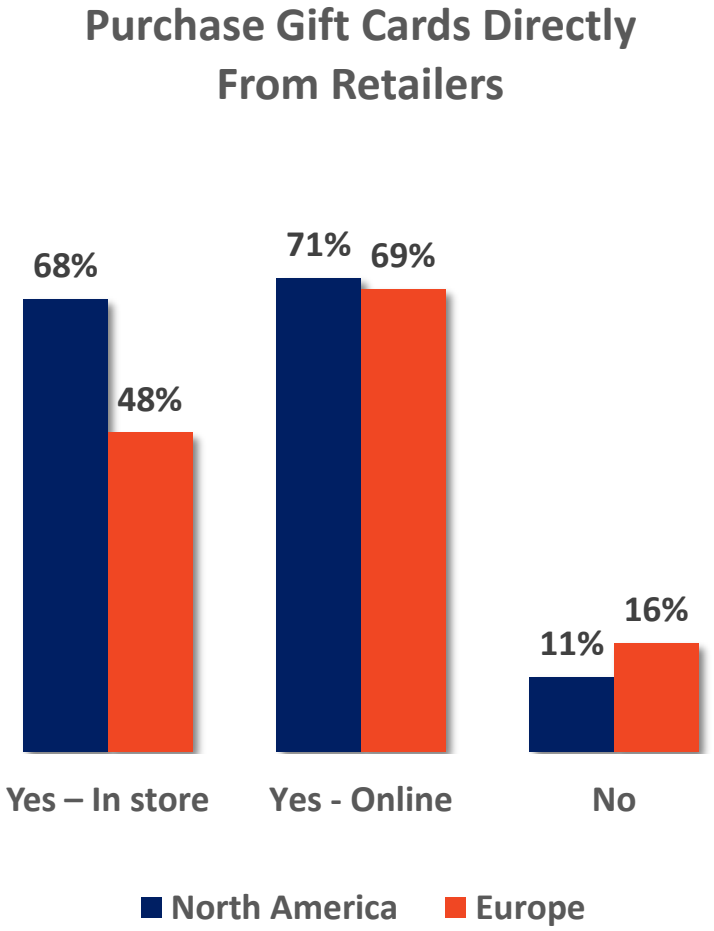


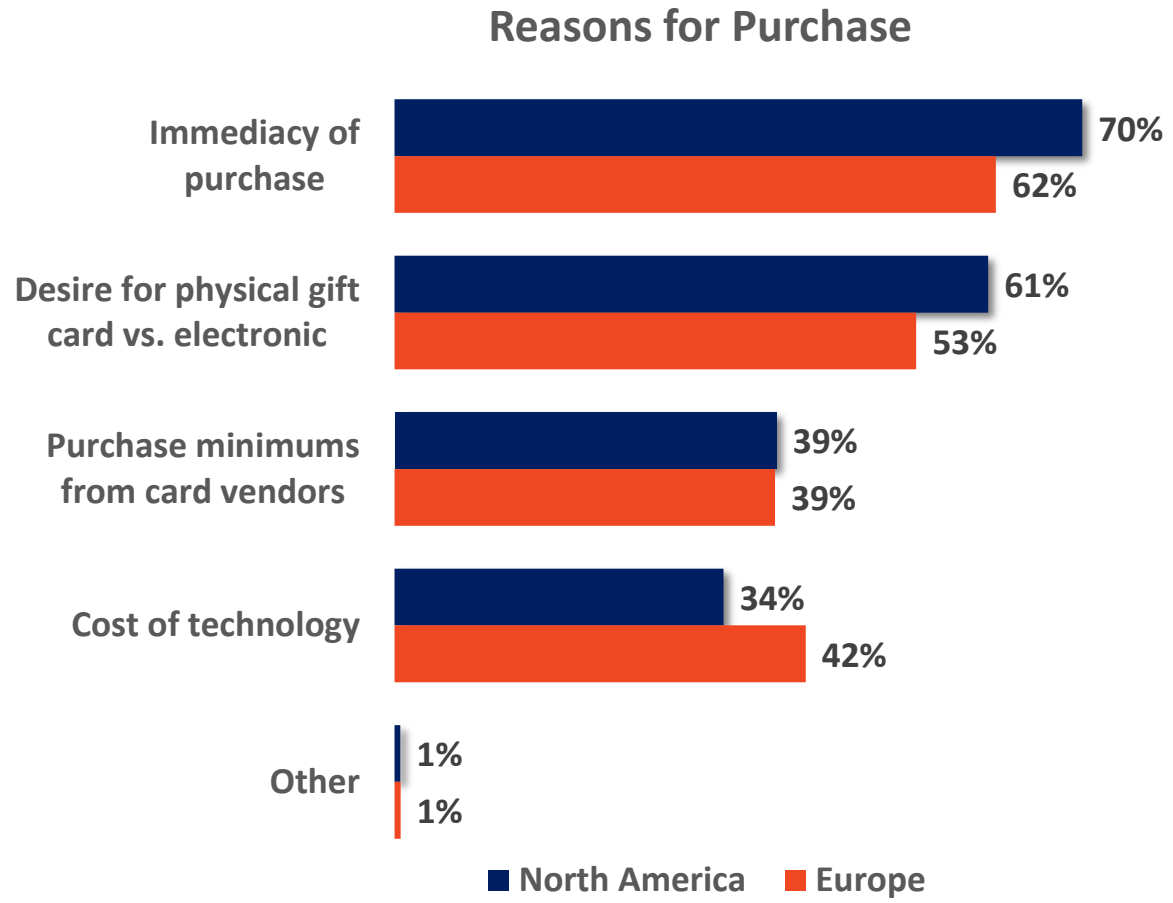
Q45: Which of the options below best describes the types of merchants selected when your company buys BRANDED gift cards for your non-cash rewards programs?

Top 10 selections – a full table of all branded gift card merchants can be found in the Appendix

Local Gift Card Sourcing

The immediacy of purchase and the desire of a physical card drive organizations to local retailers

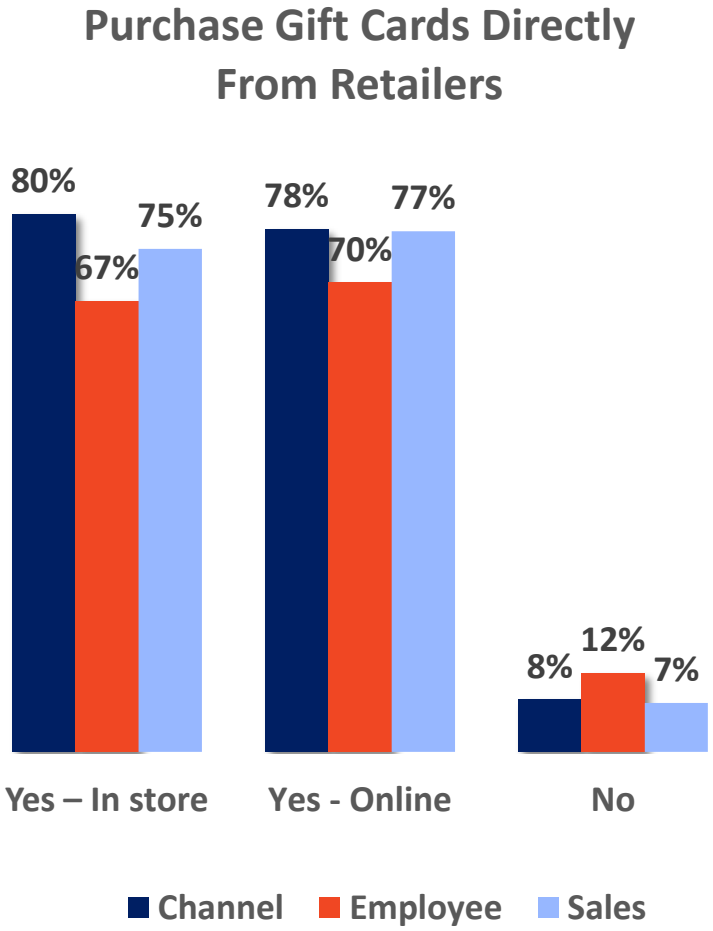


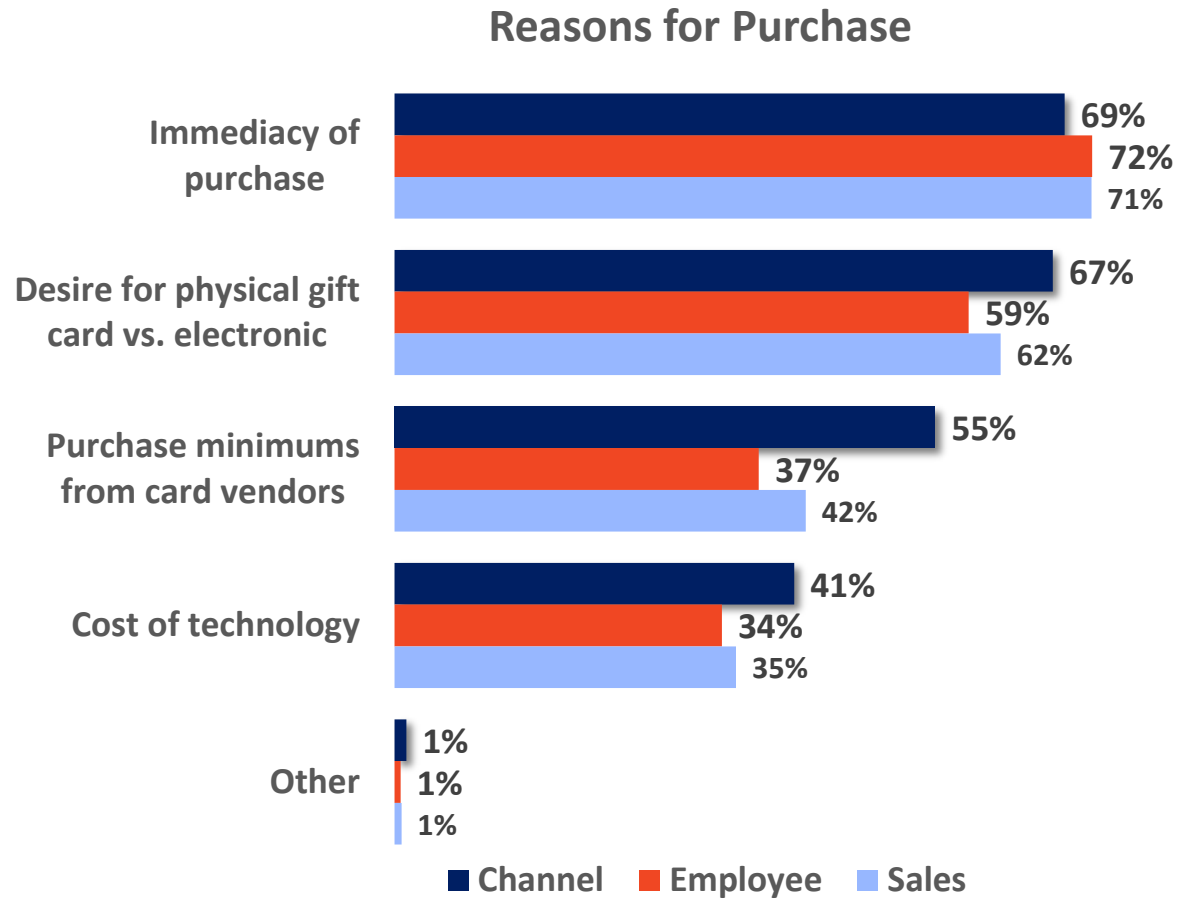


Q46: Does anyone in your organization purchase gift cards directly from retailers, such as Target, Walgreens, Walmart, CVS or a supermarket, for use as non-cash rewards?
Q47: What reason(s) lead your organization to purchase gift cards directly from retailers?

North American Local Gift Card Sourcing

North American channel and sales programs are most likely to purchase gift cards directly from retailers

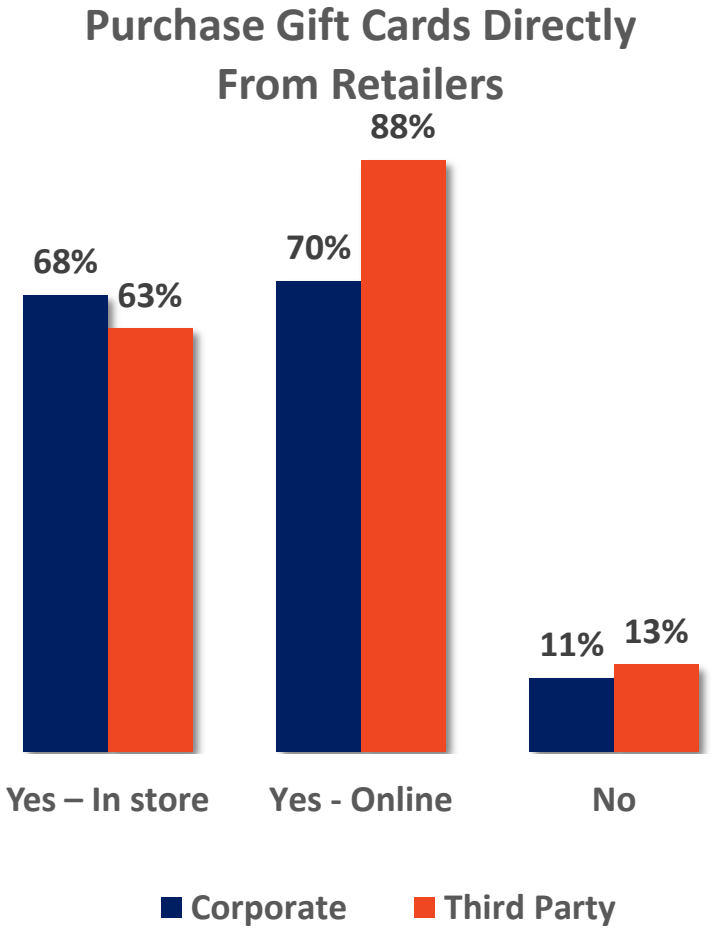


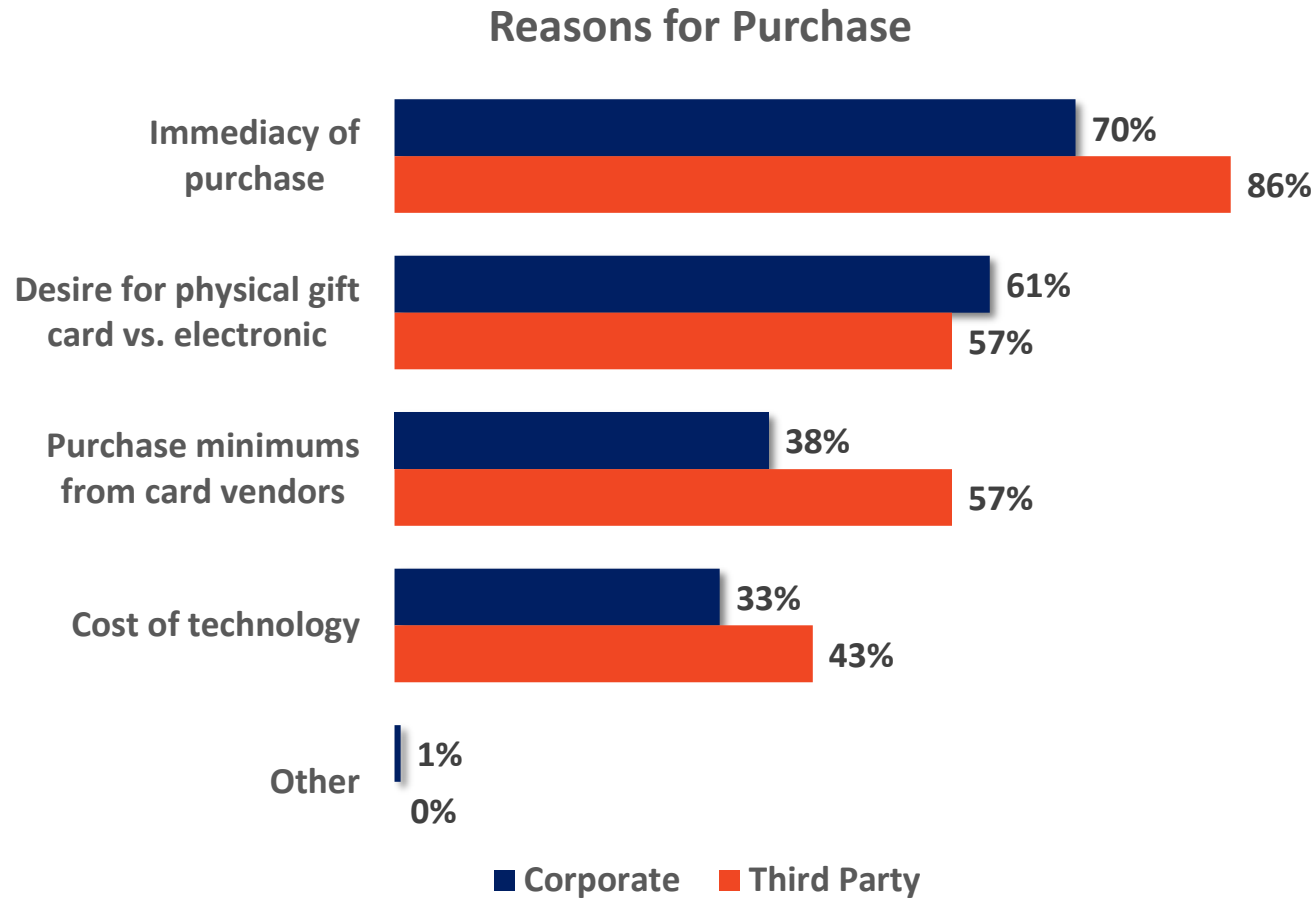


Q46: Does anyone in your organization purchase gift cards directly from retailers, such as Target, Walgreens, Walmart, CVS or a supermarket, for use as non-cash rewards?
Q47: What reason(s) lead your organization to purchase gift cards directly from retailers?

North American Local Gift Card Sourcing

The immediacy of purchase drives North American third parties to gift cards online

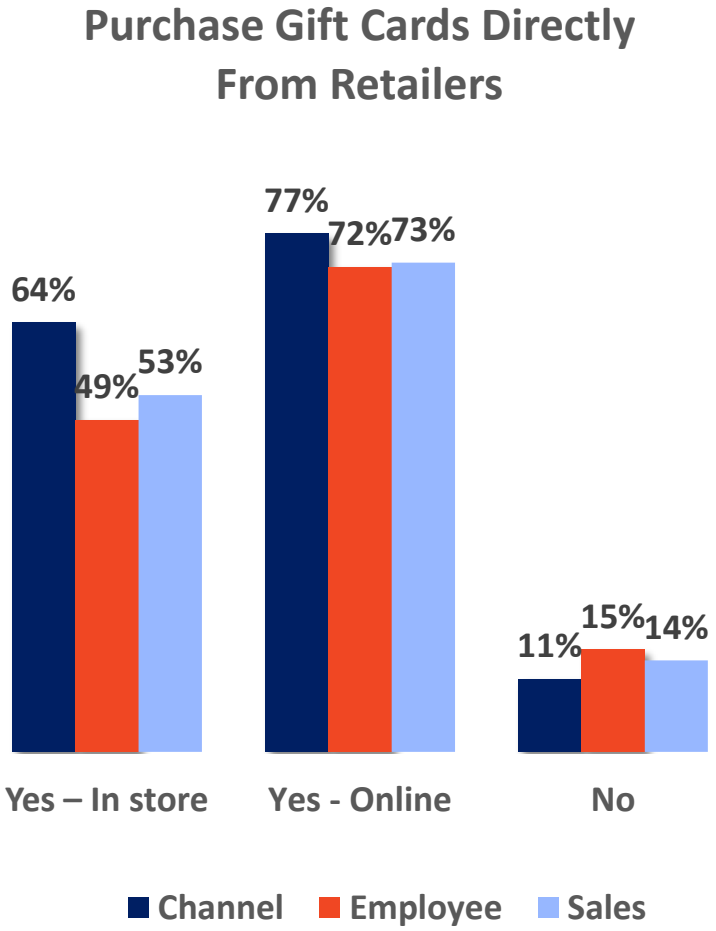


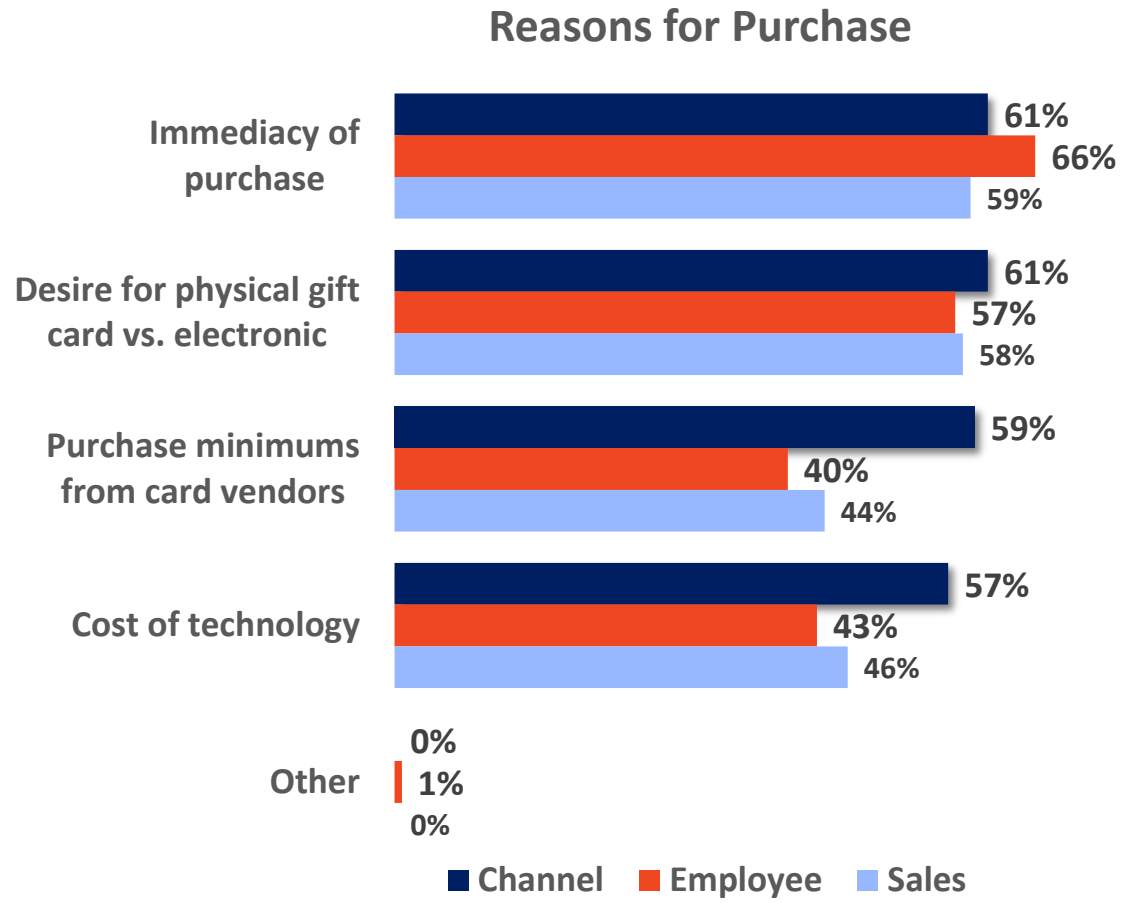


Q46: Does anyone in your organization purchase gift cards directly from retailers, such as Target, Walgreens, Walmart, CVS or a supermarket, for use as non-cash rewards?
Q47: What reason(s) lead your organization to purchase gift cards directly from retailers?

European Local Gift Card Sourcing

European channel programs often favor direct retailer purchases to reduce costs





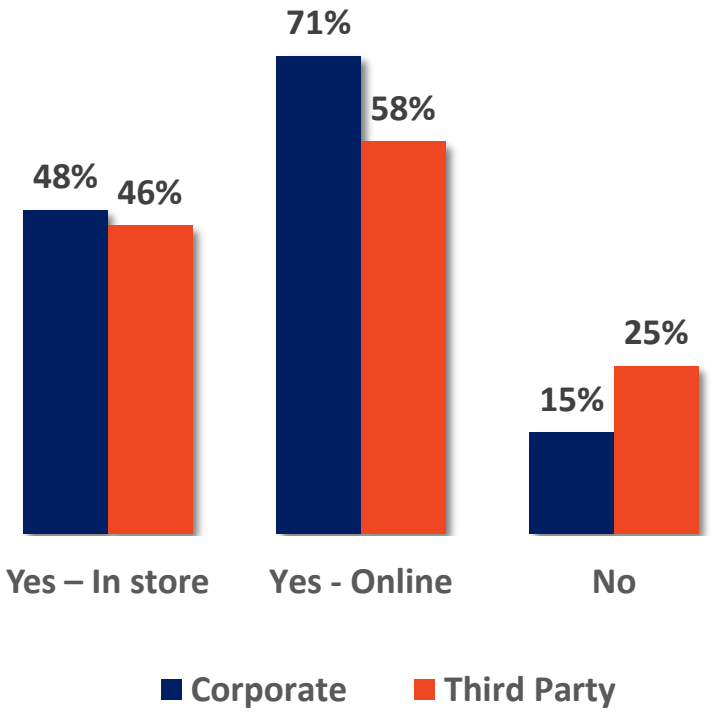
Q46: Does anyone in your organization purchase gift cards directly from retailers, such as Target, Walgreens, Walmart, CVS or a supermarket, for use as non-cash rewards?

Q47: What reason(s) lead your organization to purchase gift cards directly from retailers?

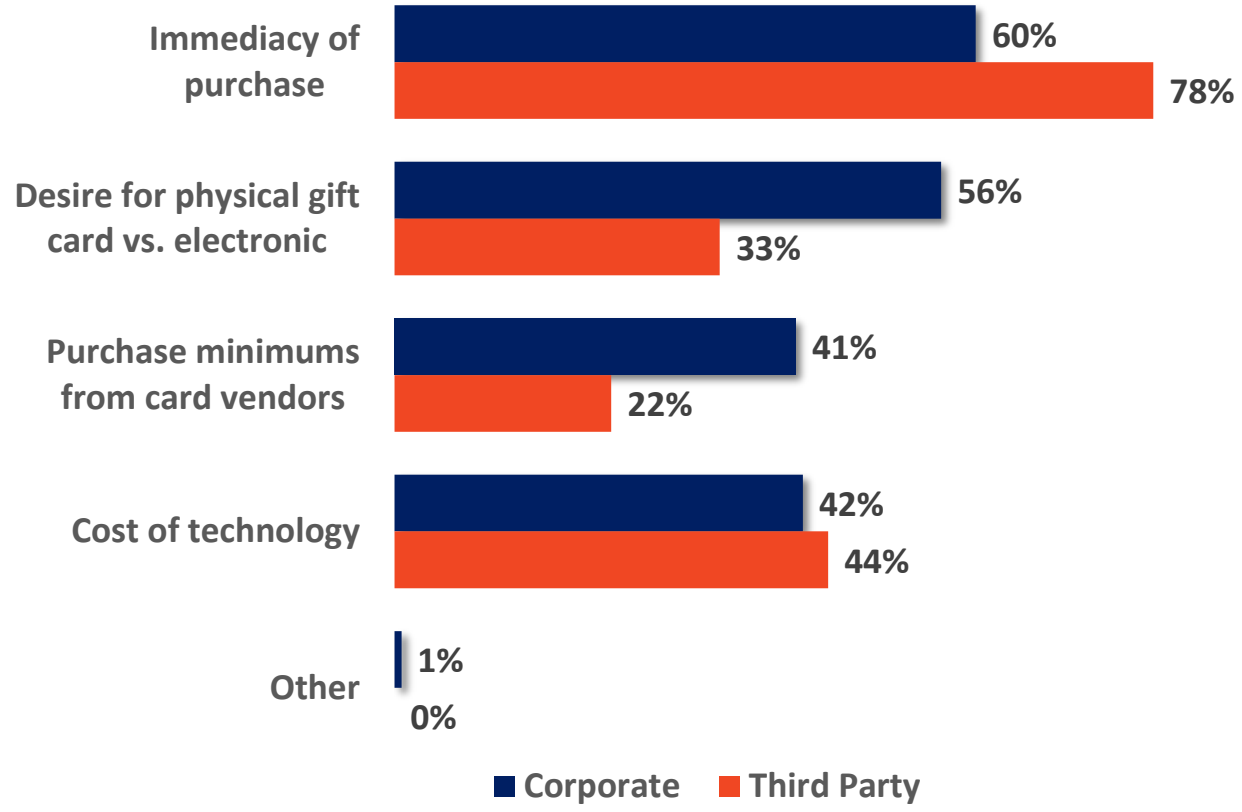
European Local Gift Card Sourcing

European third parties are less likely to purchase gift cards direct from retailers, but immediacy drives those who do

Purchase Gift Cards Directly From Retailers



Reasons for Purchase



Q46: Does anyone in your organization purchase gift cards directly from retailers, such as Target, Walgreens, Walmart, CVS or a supermarket, for use as non-cash rewards?
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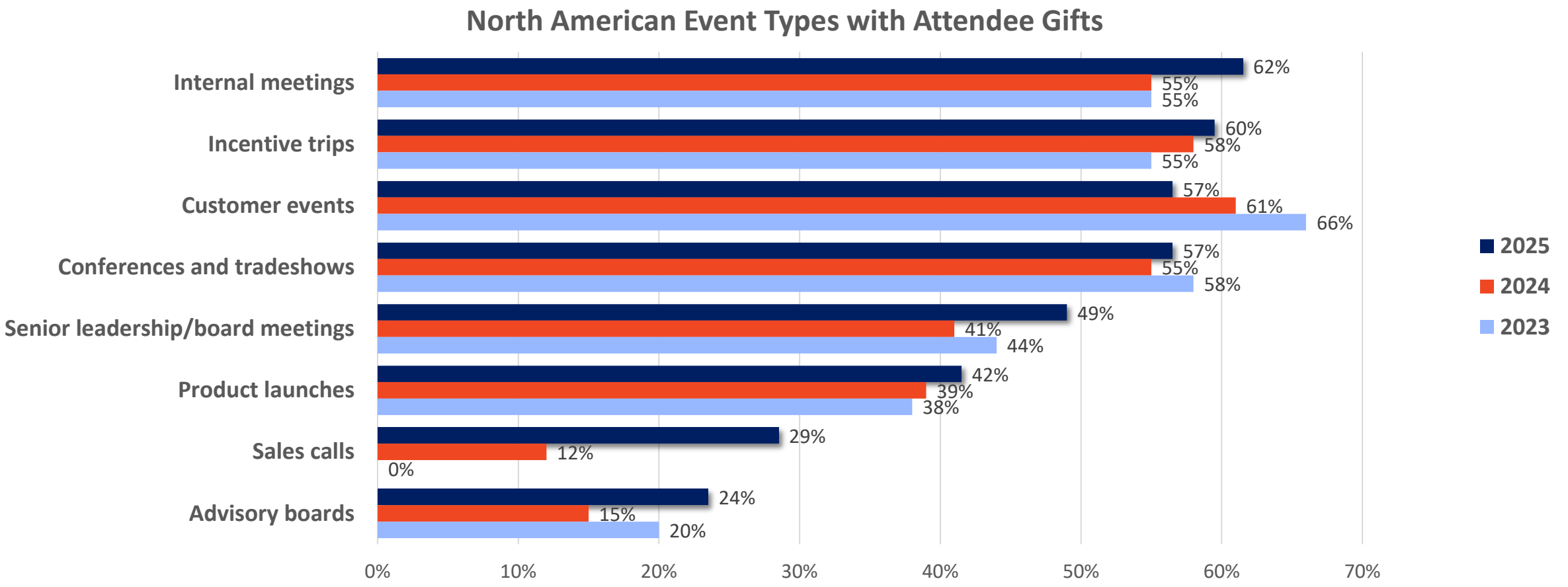
Event Gifting

Event Gifting Occasions

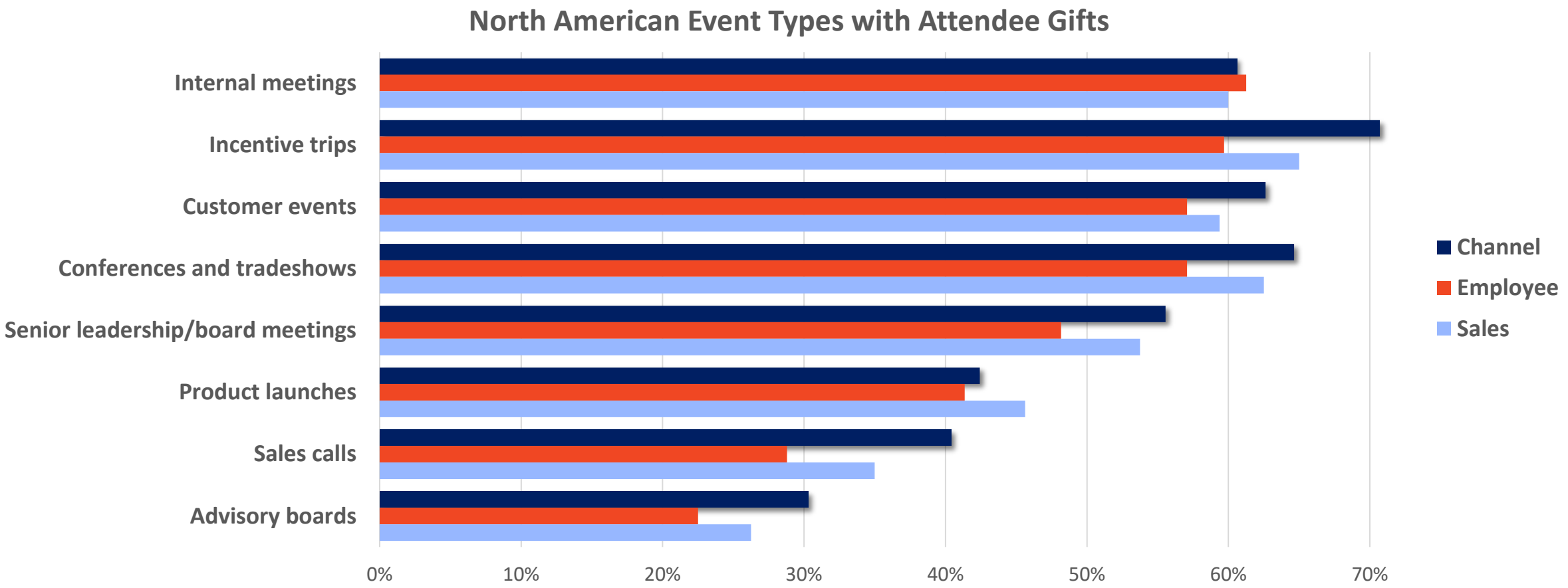
In North America, attendee gifts are most common at internal meetings and incentive trips, with customer events and conferences/tradeshows following closely



Q32: For what types of meetings and events do you use or supply attendee gifts?

Event Gifting Occasions

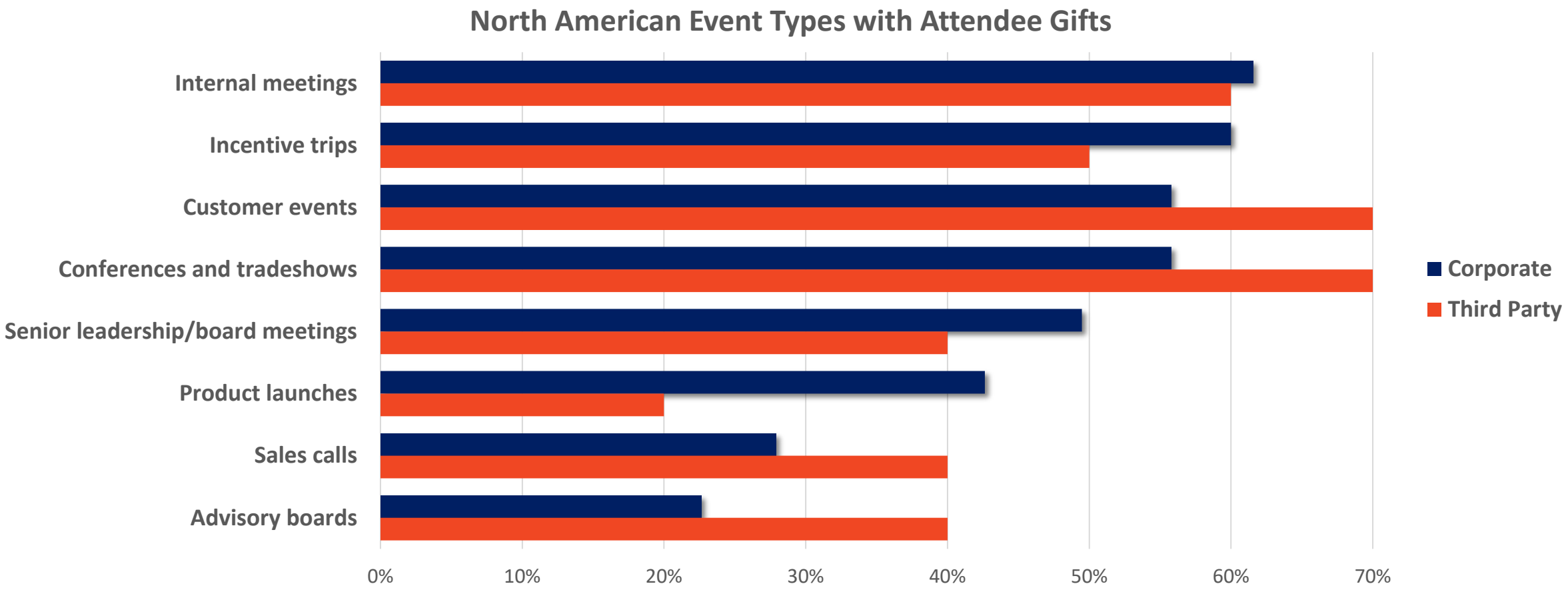
North American channel programs lead in gifting at high-profile events, sales programs take a balanced approach, and employee programs gift less frequently across most event types



Q32: For what types of meetings and events do you use or supply attendee gifts?

Event Gifting Occasions

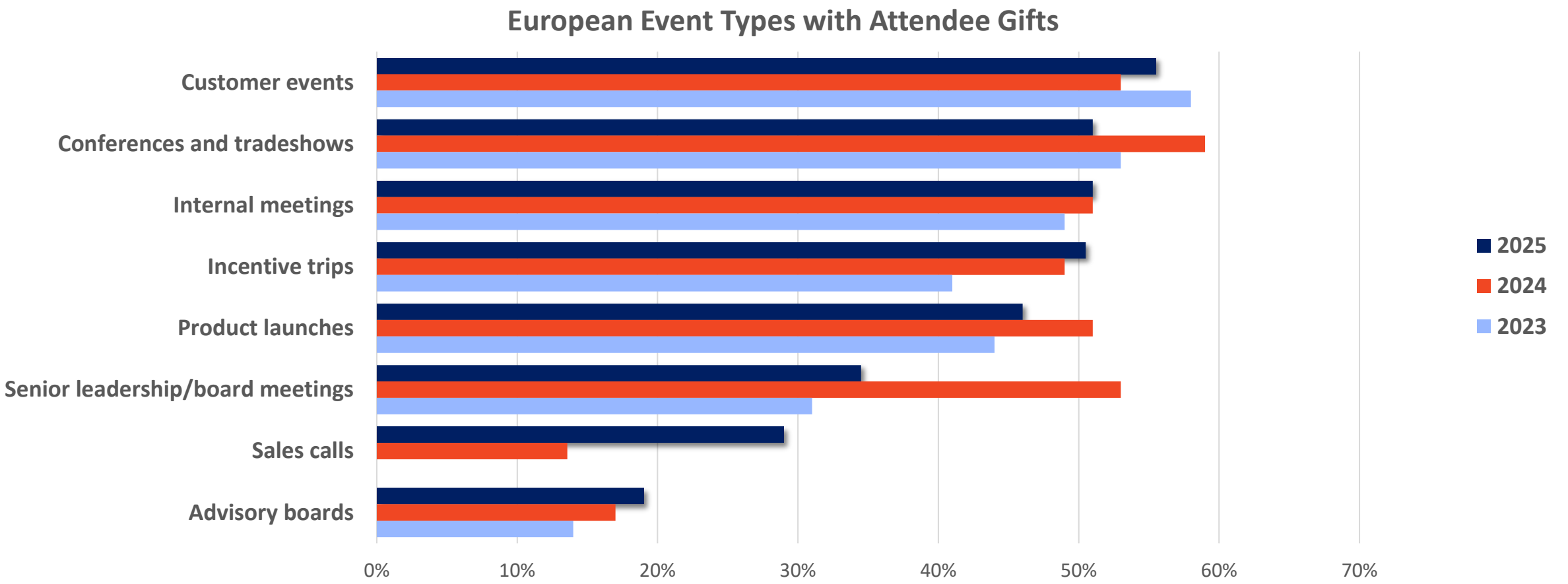
North American corporate entities favor gifting at internal and incentive-based events, while third-party programs prioritize customer-facing and targeted events



Q32: For what types of meetings and events do you use or supply attendee gifts?

Event Gifting Occasions

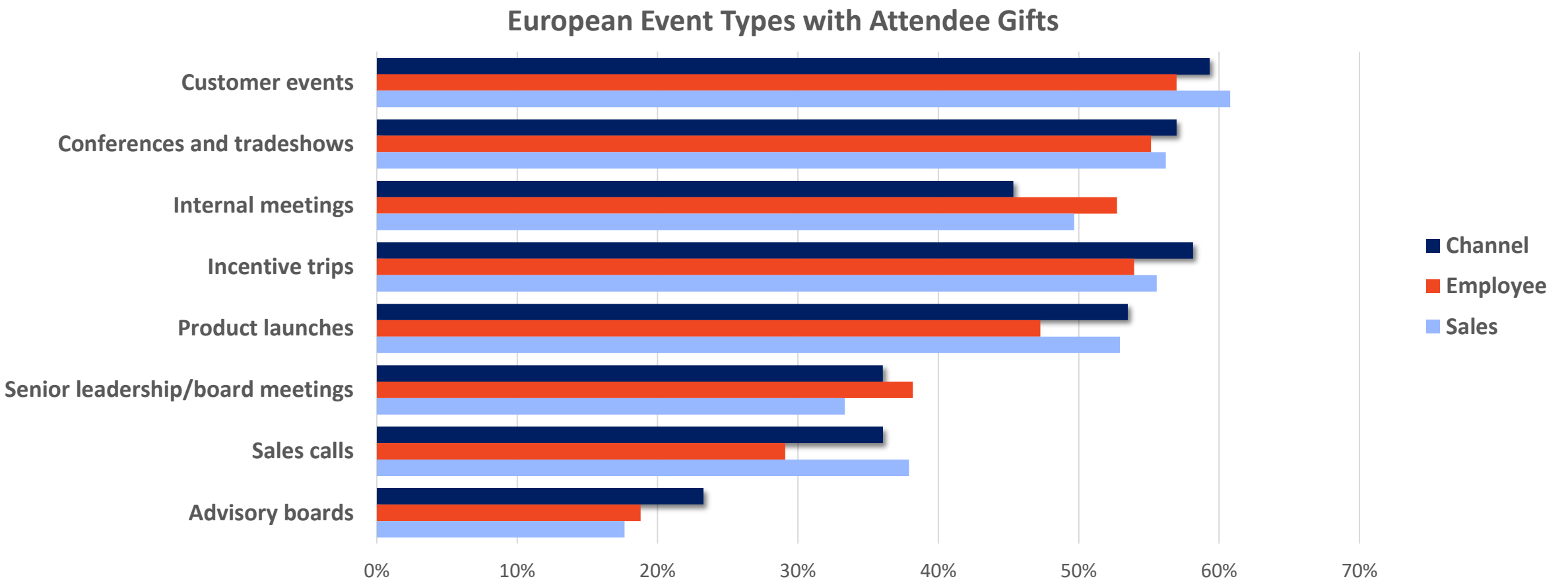
In Europe, customer events, conferences, internal meetings, and incentives trips most commonly include attendee gifts



Q32: For what types of meetings and events do you use or supply attendee gifts?

Event Gifting Occasions

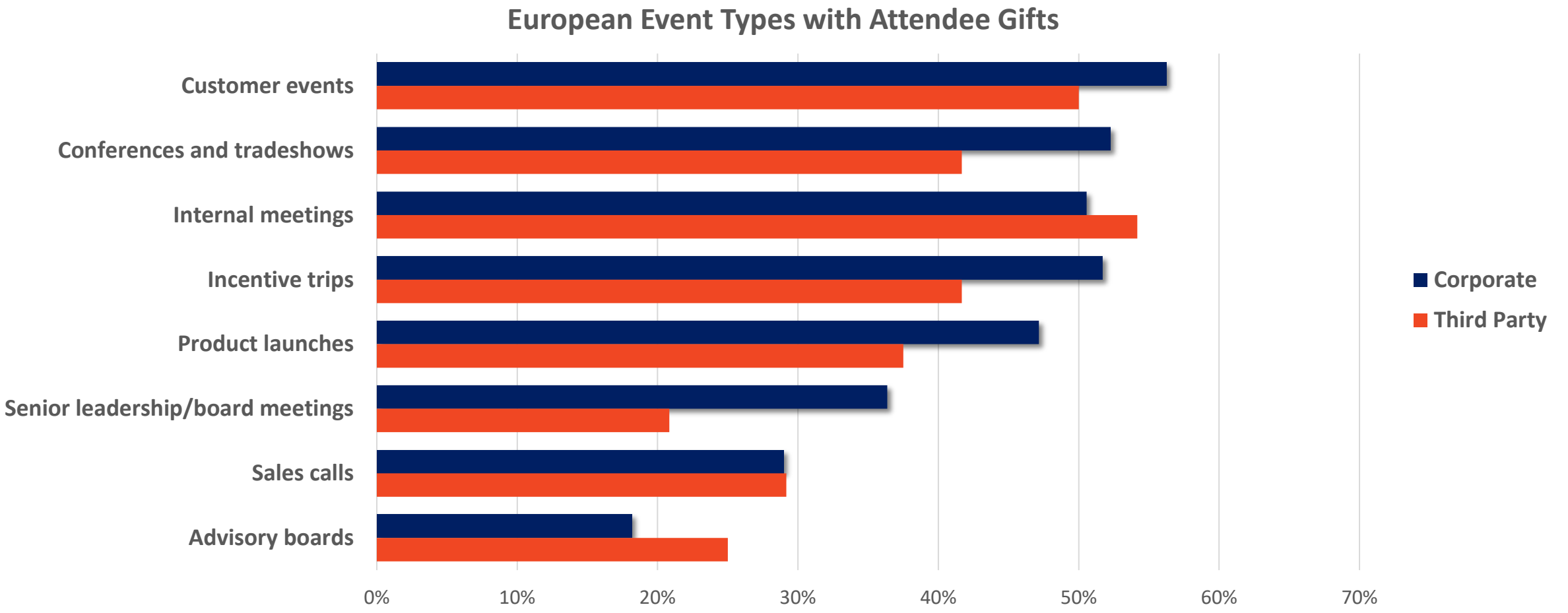
European channel programs emphasize gifting at external events, while employee and sales programs take a more balance approach



Q32: For what types of meetings and events do you use or supply attendee gifts?

Event Gifting Occasions

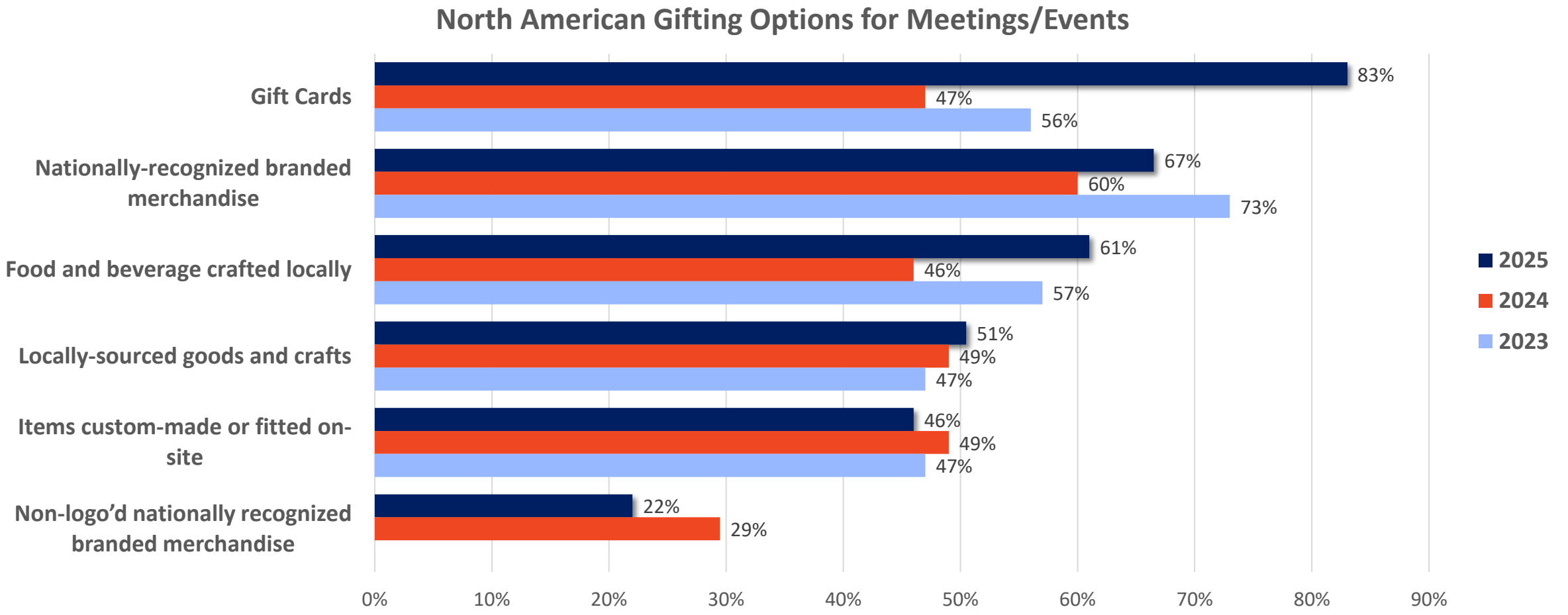
European corporate organizations are more likely than third parties to include attendee gifts across most events



Q32: For what types of meetings and events do you use or supply attendee gifts?

Event Gifting Options

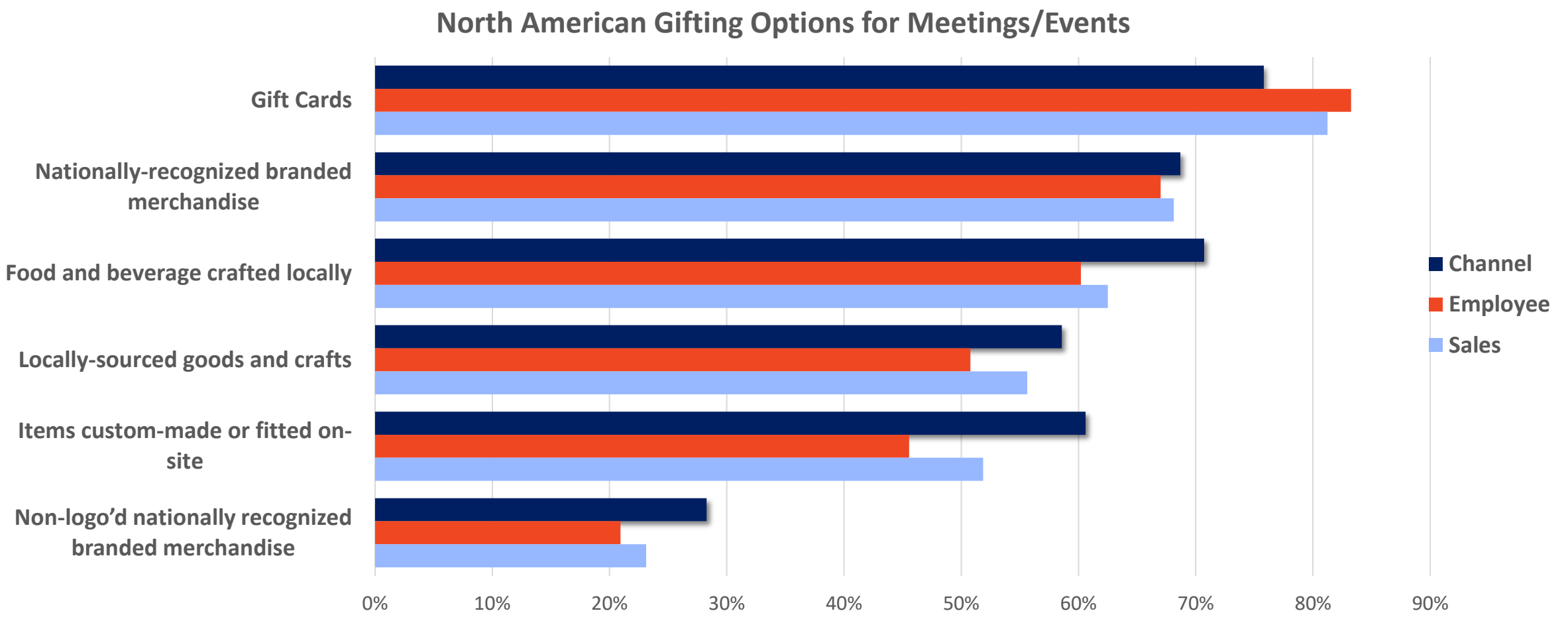
Dramatic increases in gift card popularity place it as the most common event gift option in North America



Q35: Which of the below options, do you use or supply as part of meeting/event gifting?

Event Gifting Options

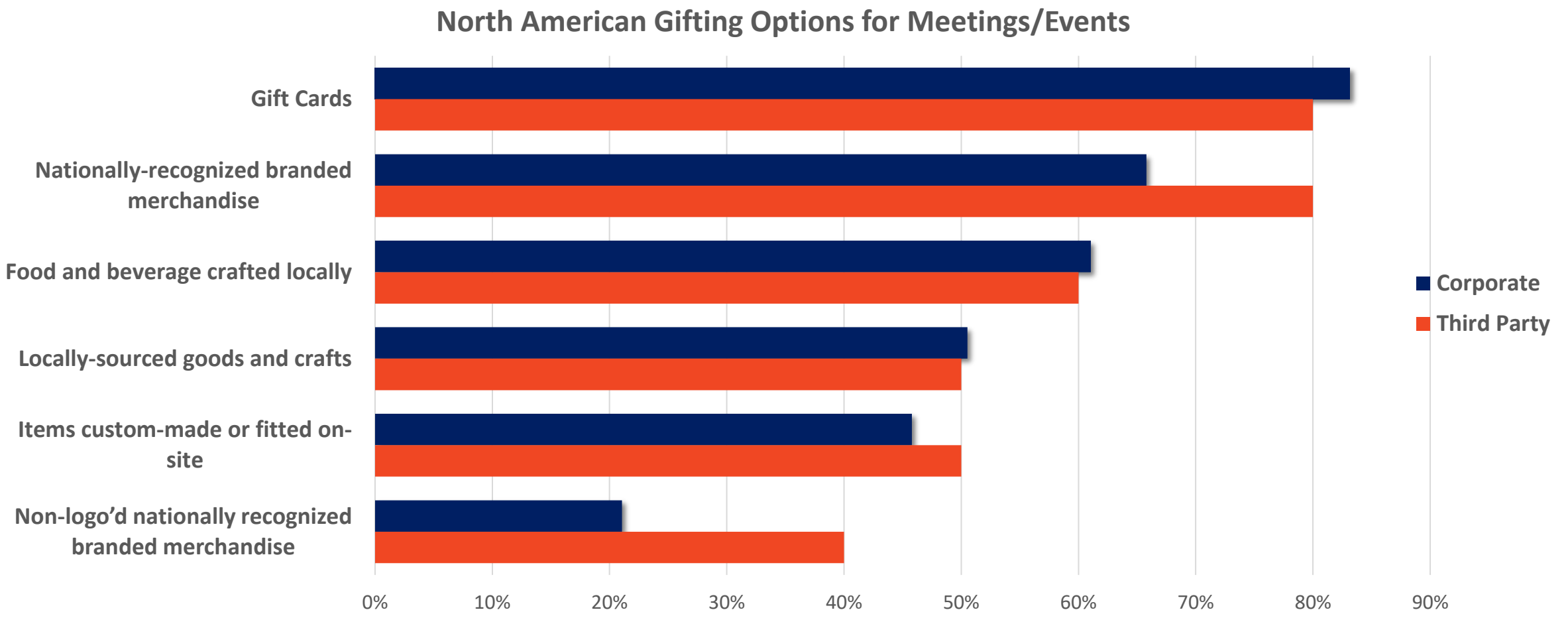
North American channel programs are more likely to provide locally-inspired event gifts



Q35: Which of the below options, do you use or supply as part of meeting/event gifting?

Event Gifting Options

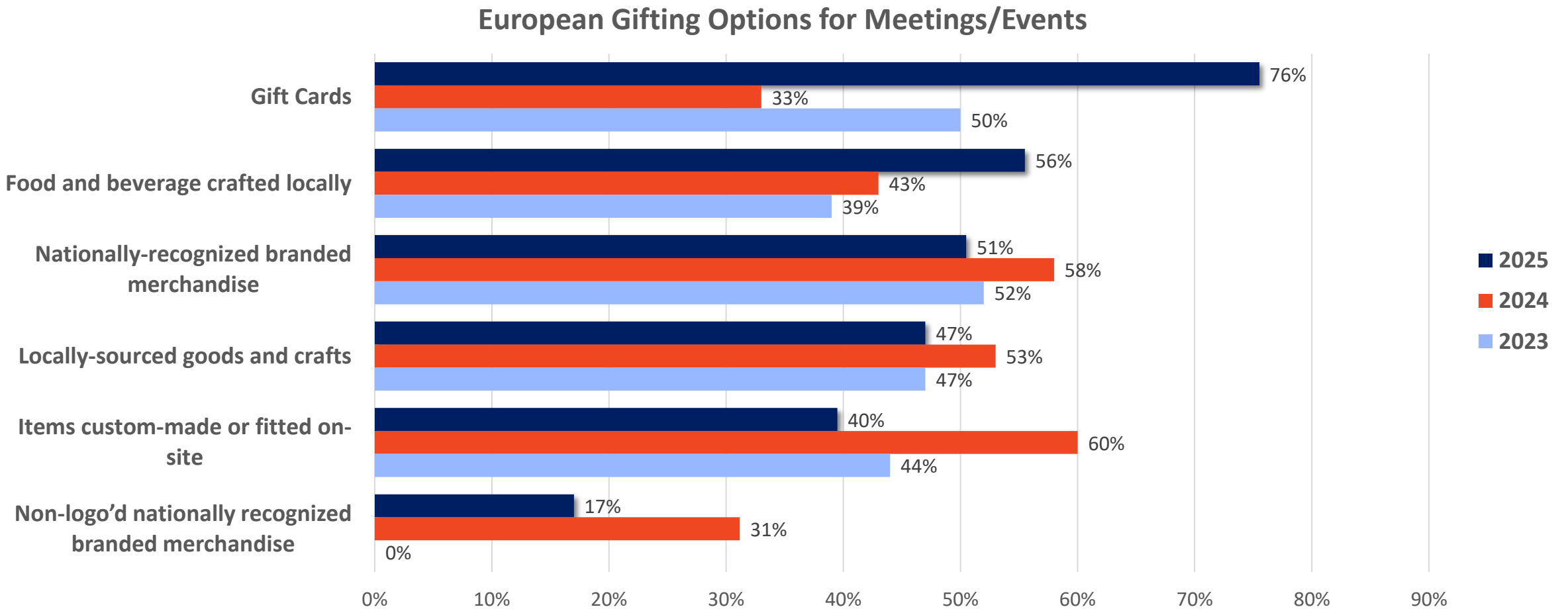
Third parties are more likely to leverage nationally-recognized merchandise for on-site gifting



Q35: Which of the below options, do you use or supply as part of meeting/event gifting?

Event Gifting Options

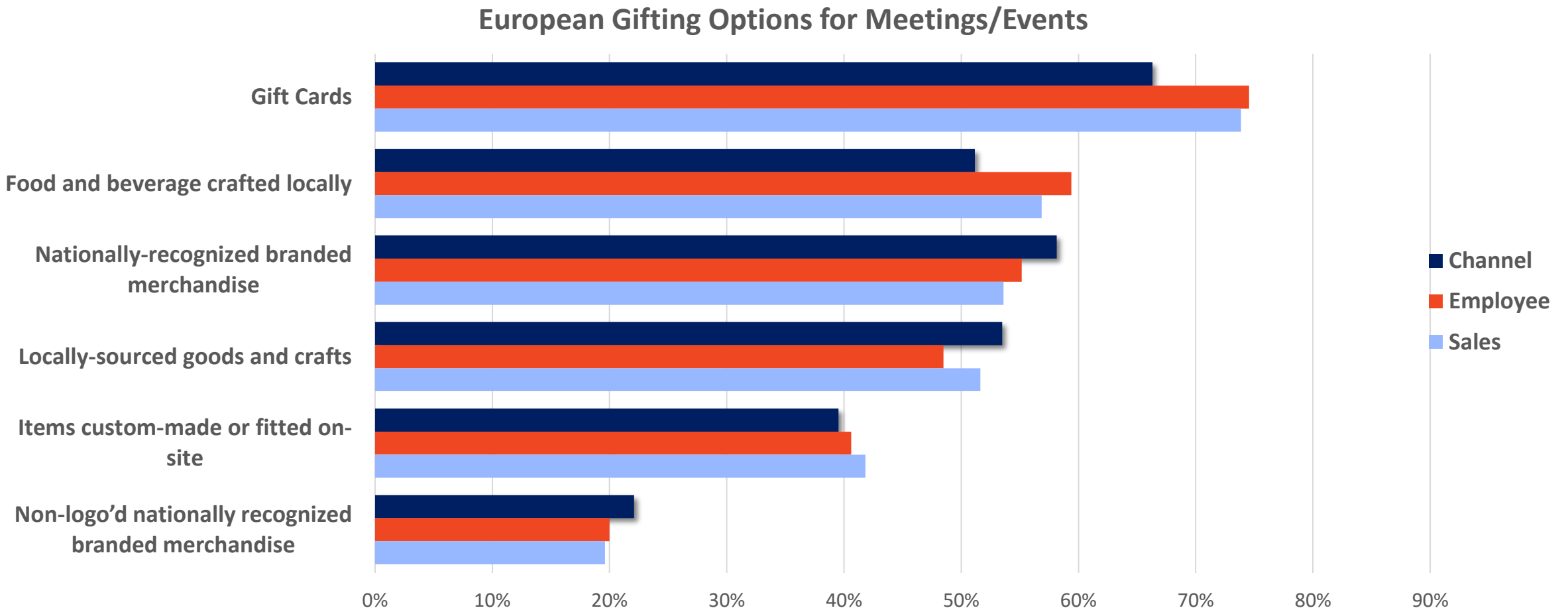
Gift cards and local food and beverage items rise in popularity for European event gifting



Q35: Which of the below options, do you use or supply as part of meeting/event gifting?

Event Gifting Options

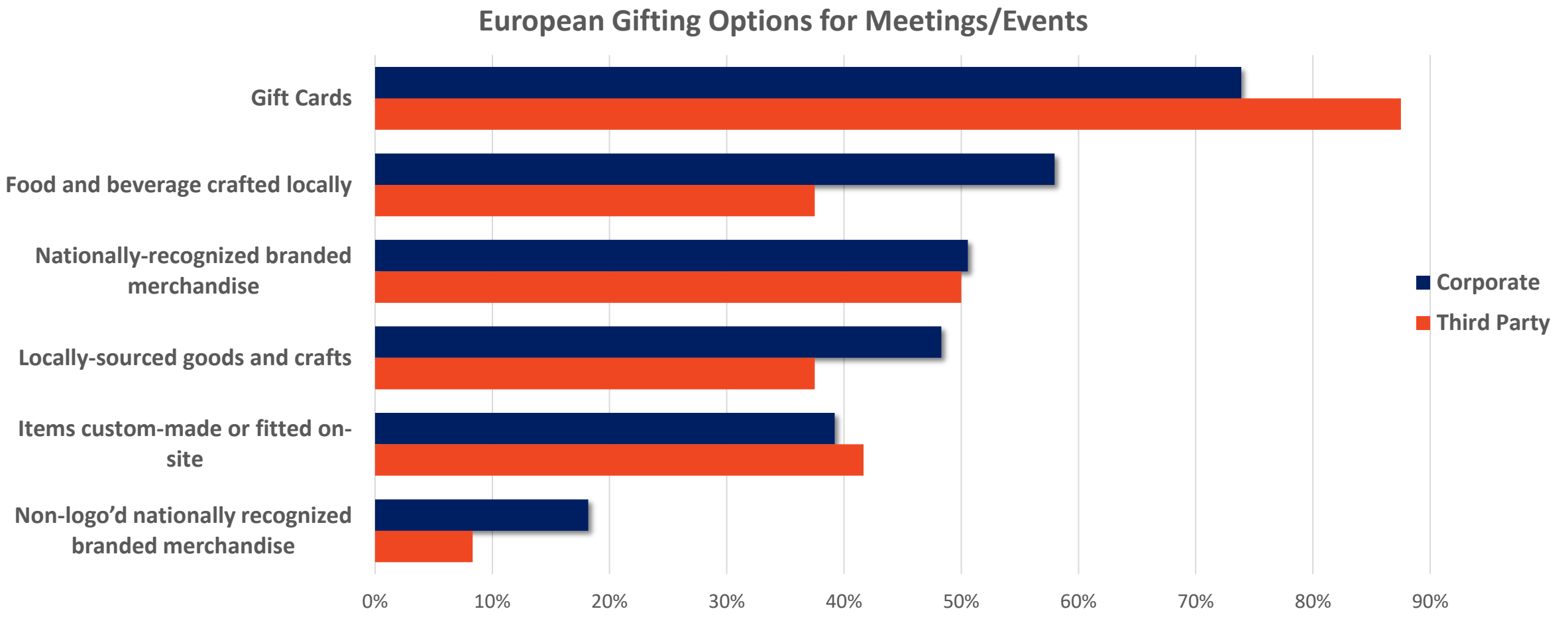
European employee and sales programs are more likely to leverage gift cards and local food and beverage options



Q35: Which of the below options, do you use or supply as part of meeting/event gifting?

Event Gifting Options

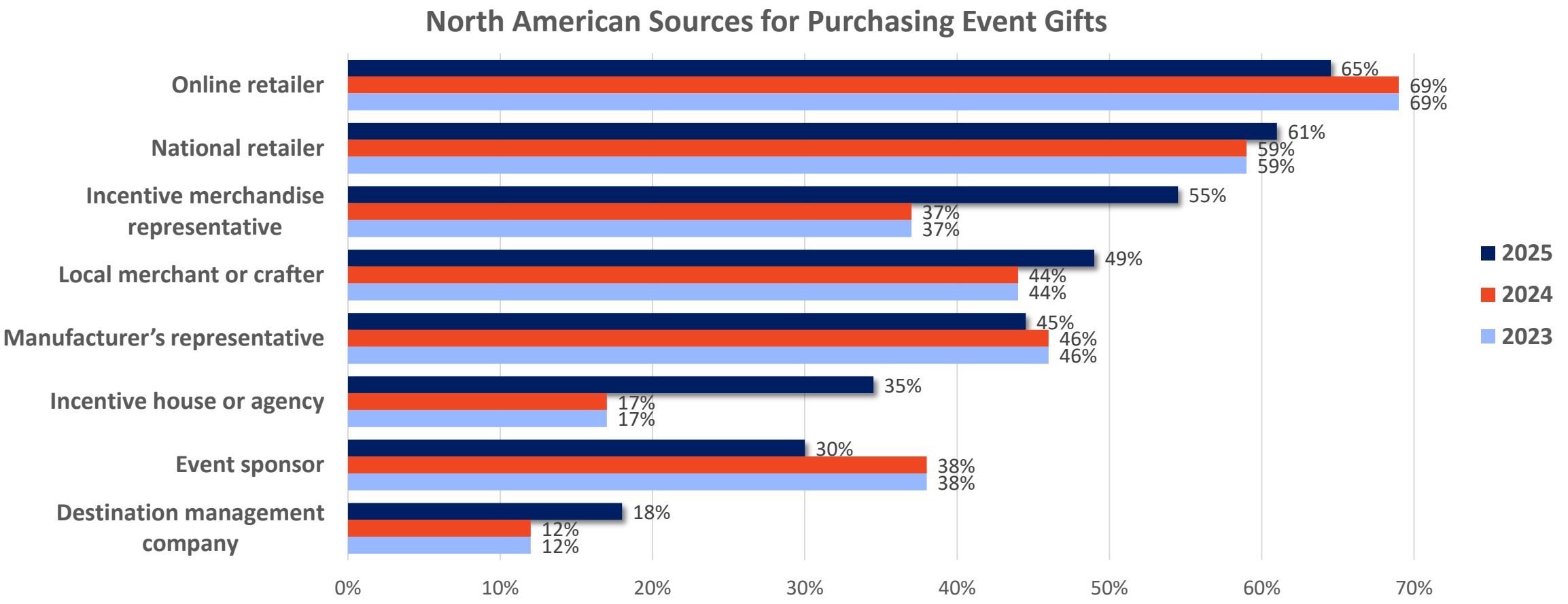
European third parties rely heavily on gift cards, while corporate entities take a more diversified gifting approach



Q35: Which of the below options, do you use or supply as part of meeting/event gifting?

Event Gifting Sources

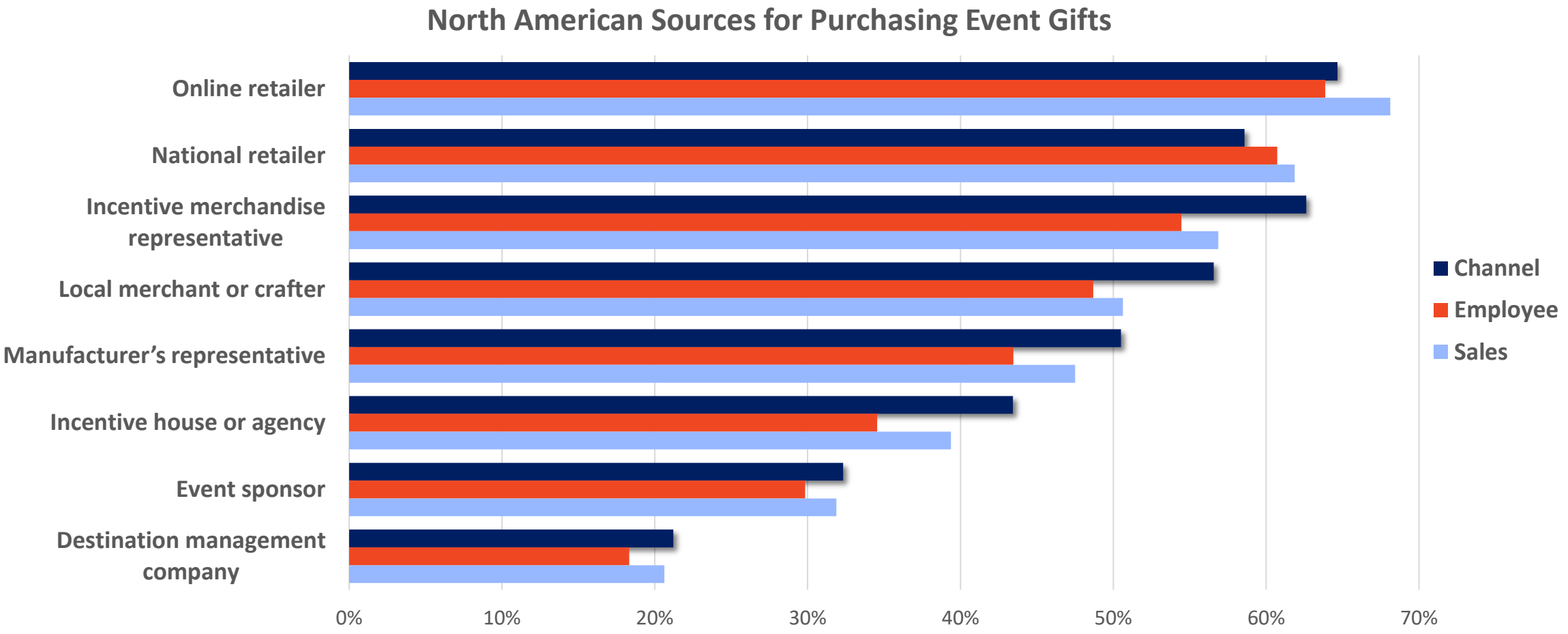
In North America, merchandise representatives climb to the third most common source for purchasing event gifts, behind online and national retailers



Q37: From which of the sources below options, do you purchase event gifts?

Event Gifting Sources

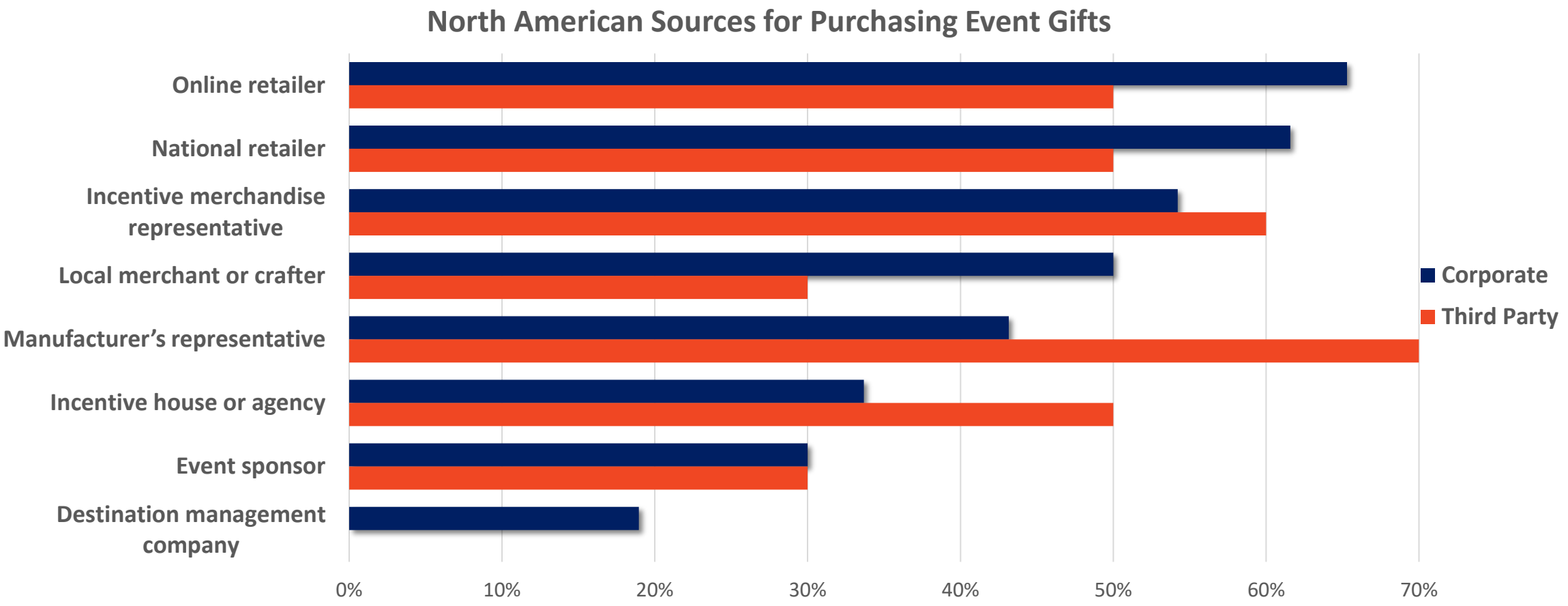
North American programs source event gifts from similar partners, with only slight variation by program type



Q37: From which of the sources below options, do you purchase event gifts?

Event Gifting Sources

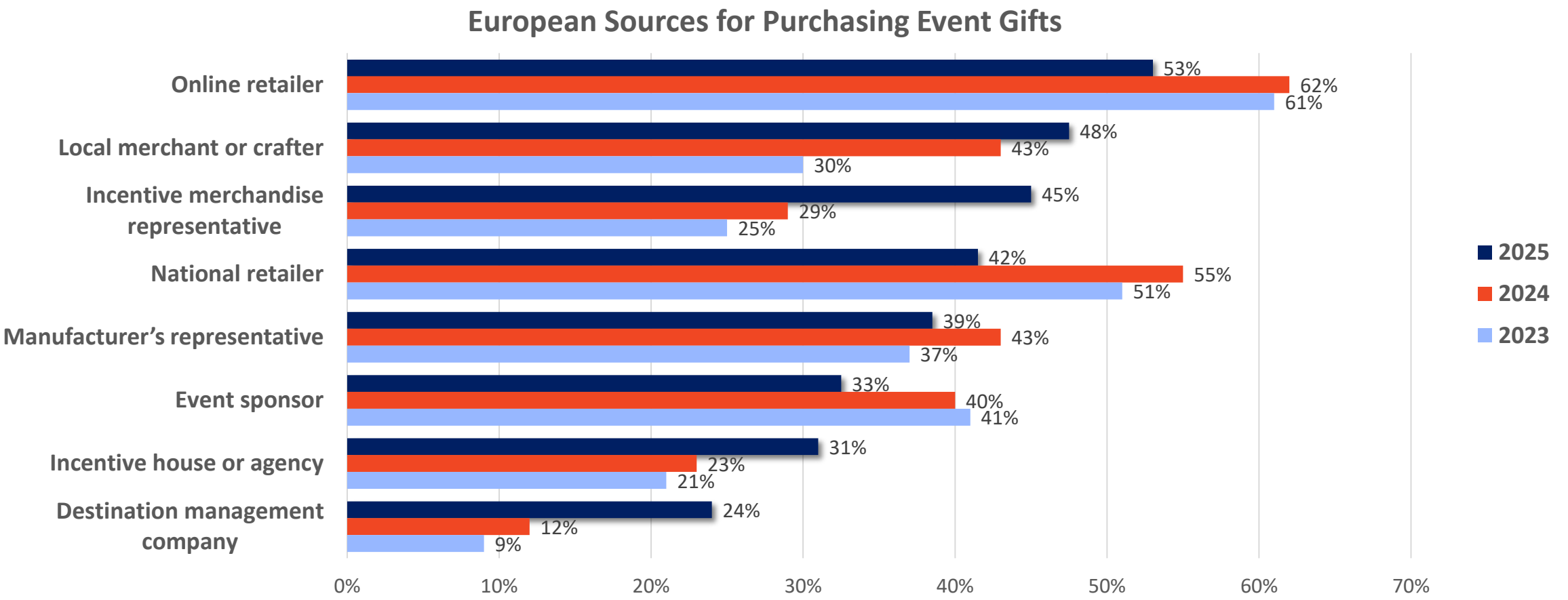
While North American corporate entities favor national and online retailers, third parties are more likely to source event gifts from manufacturer and merchandise representatives, and incentive agencies



Q37: From which of the sources below options, do you purchase event gifts?

Event Gifting Sources

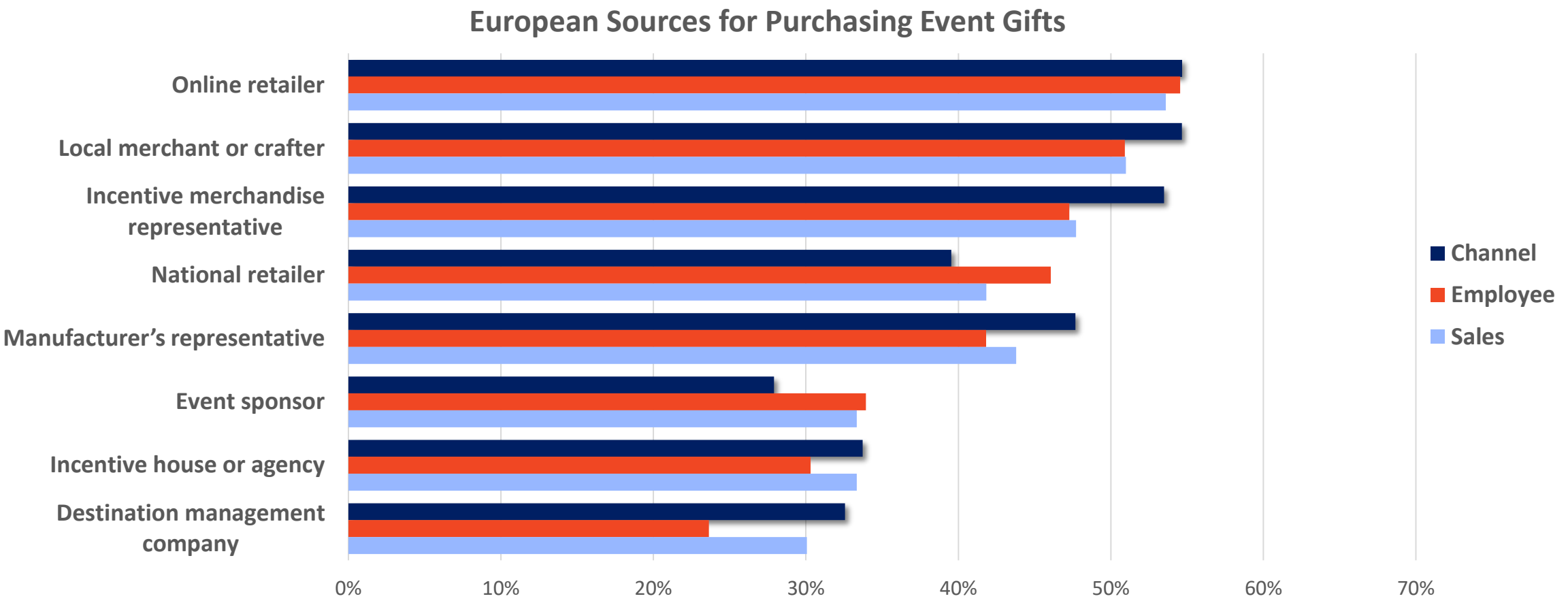
In Europe, online retailers remain the top source for event gifts, while local merchants and merchandise representatives increase in popularity



Q37: From which of the sources below options, do you purchase event gifts?

Event Gifting Sources

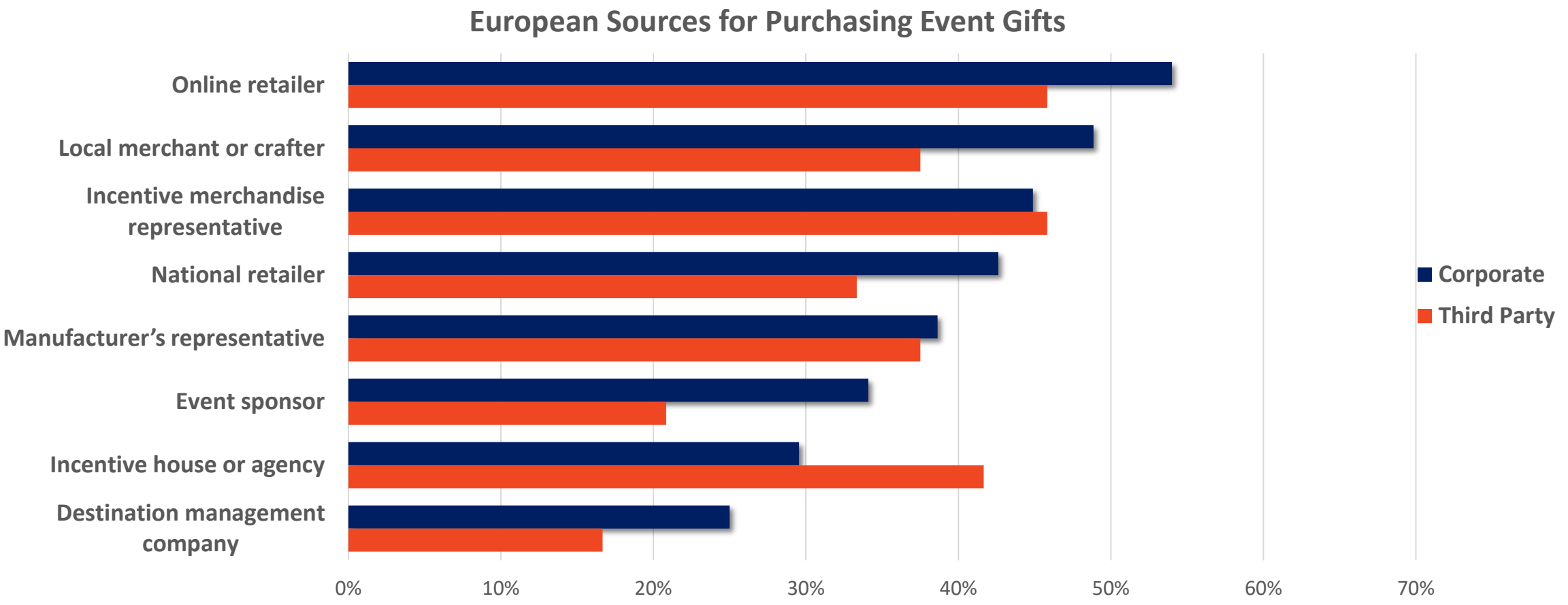
Alongside top sources, European employee programs favor national retailers, while channel and sales programs lean toward manufacturer representatives, incentive agencies, and DMCs



Q37: From which of the sources below options, do you purchase event gifts?

Event Gifting Sources

European third parties rely more on incentive agencies, while corporate entities partner with retailers, local merchants, event sponsors, and DMCs more frequently



Q37: From which of the sources below options, do you purchase event gifts?

Influences on Event Gift Selection

Considerations of practicality, budget, personalization, and sentiment drive event gift selections

Q36: What factors are most important when selecting event gifts?
Average ranking where 1 suggest 'most important'

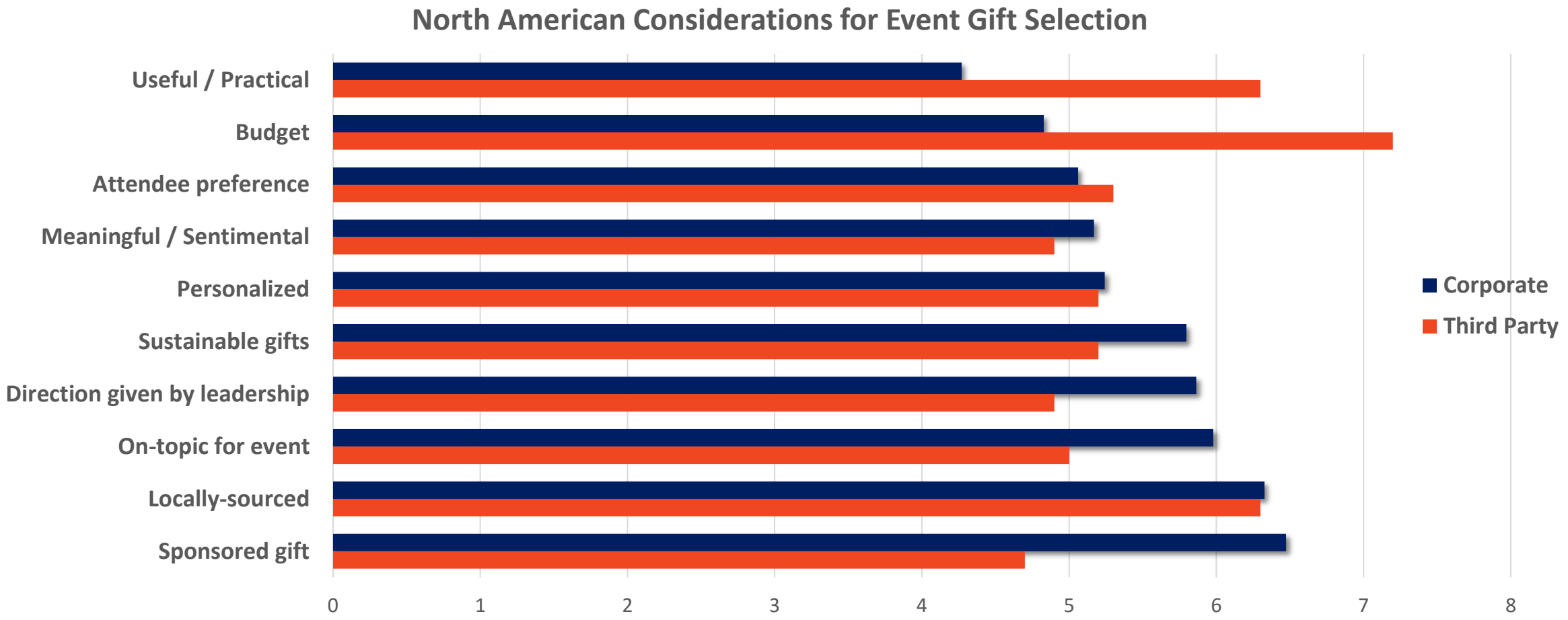
Influences on Event Gift Selection

In North America, channel programs de-emphasize practicality and budget, while employee and sales programs place greater consideration on personalization

Q36: What factors are most important when selecting event gifts?
Average ranking where 1 suggest 'most important'

Influences on Event Gift Selection

North American third parties focus less practicality and budget, and more on gift sponsors and leadership direction



Q36: What factors are most important when selecting event gifts?
Average ranking where 1 suggest 'most important'

Influences on Event Gift Selection

European channel programs place great importance on meaningfulness and attendee preference, while sales and employee programs favor practicality and budget

Q36: What factors are most important when selecting event gifts?
Average ranking where 1 suggest 'most important'

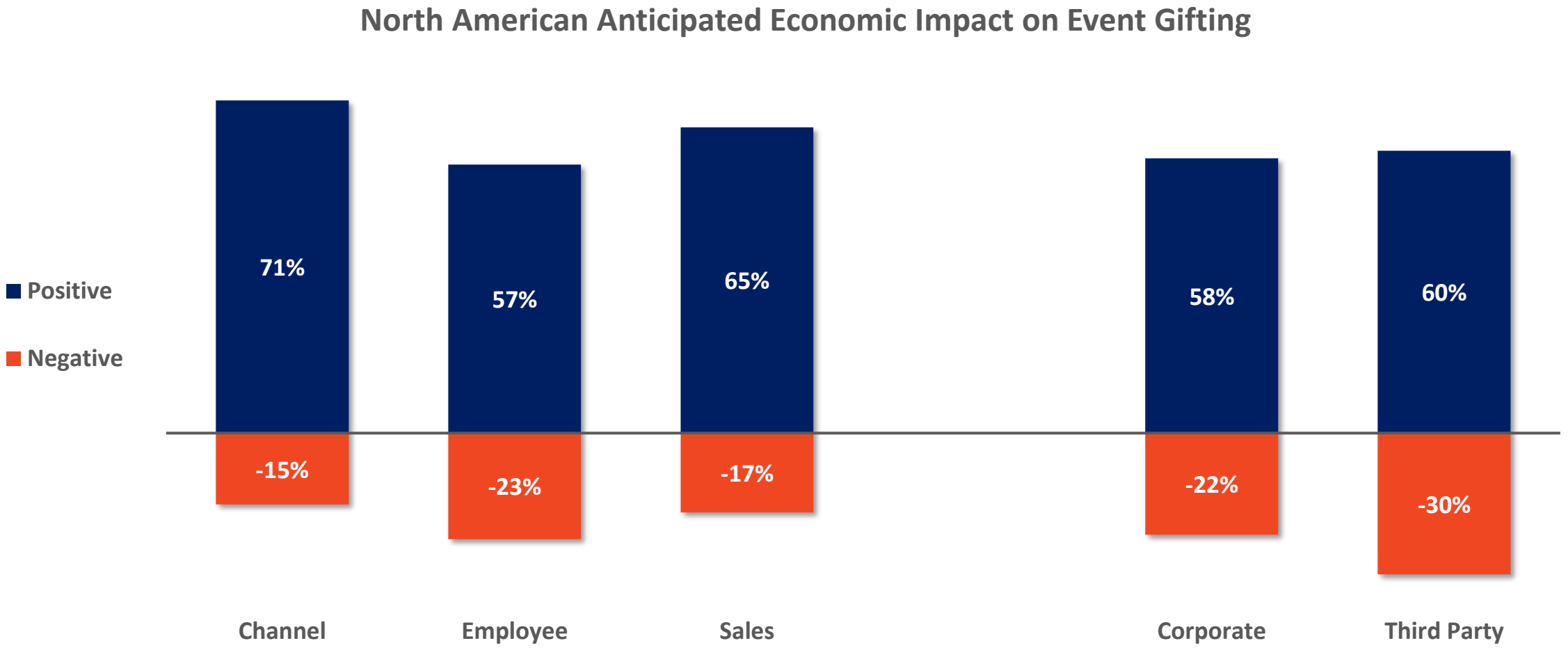
Influences on Event Gift Selection

European third parties favor sustainability and de-emphasize practicality in comparison to corporate entities

Q36: What factors are most important when selecting event gifts?
Average ranking where 1 suggest 'most important'

Influences on Event Gifting

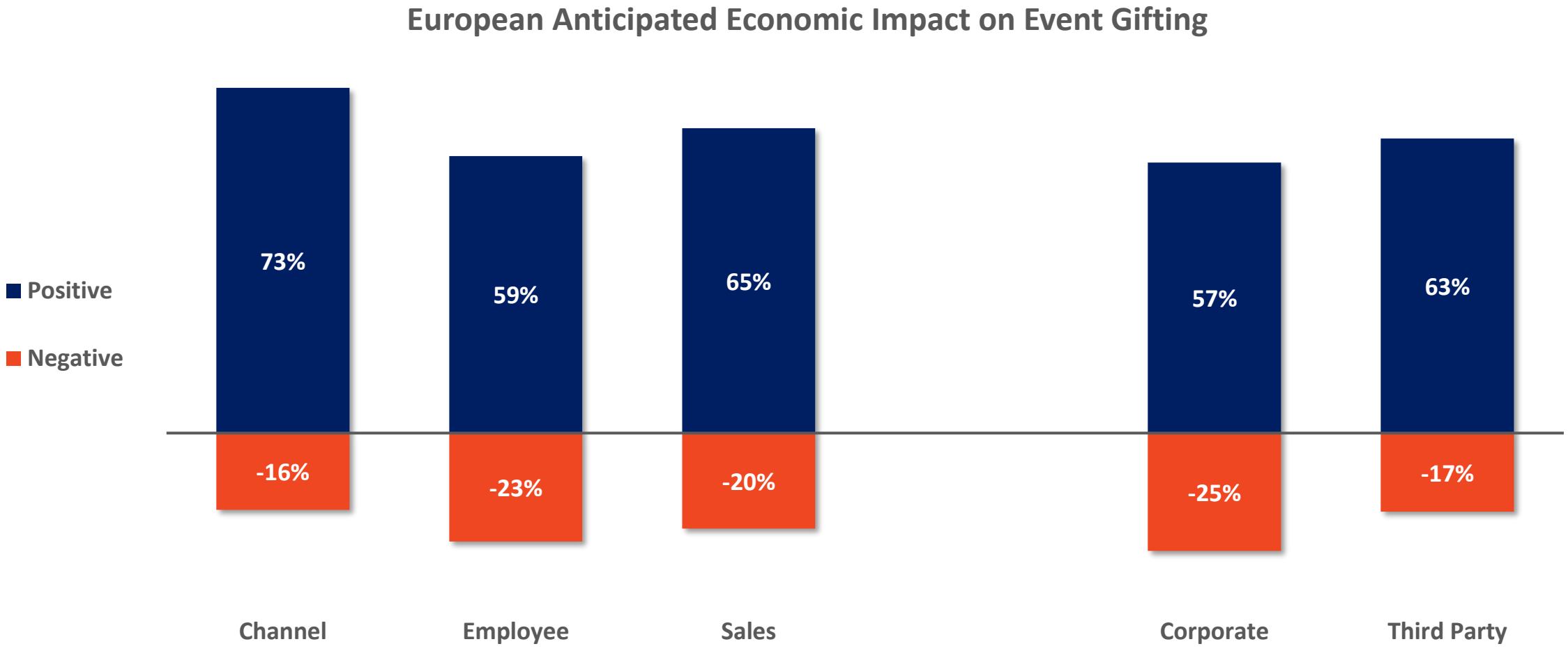
North Americans largely expect a positive economic impact on event gifting, with some concerns noted



Q25: In the coming year, what impact will the following factors below have on event gifting?

Influences on Event Gifting

Europeans also have a primarily positive outlook on the economy's impact on event gifting in the coming year

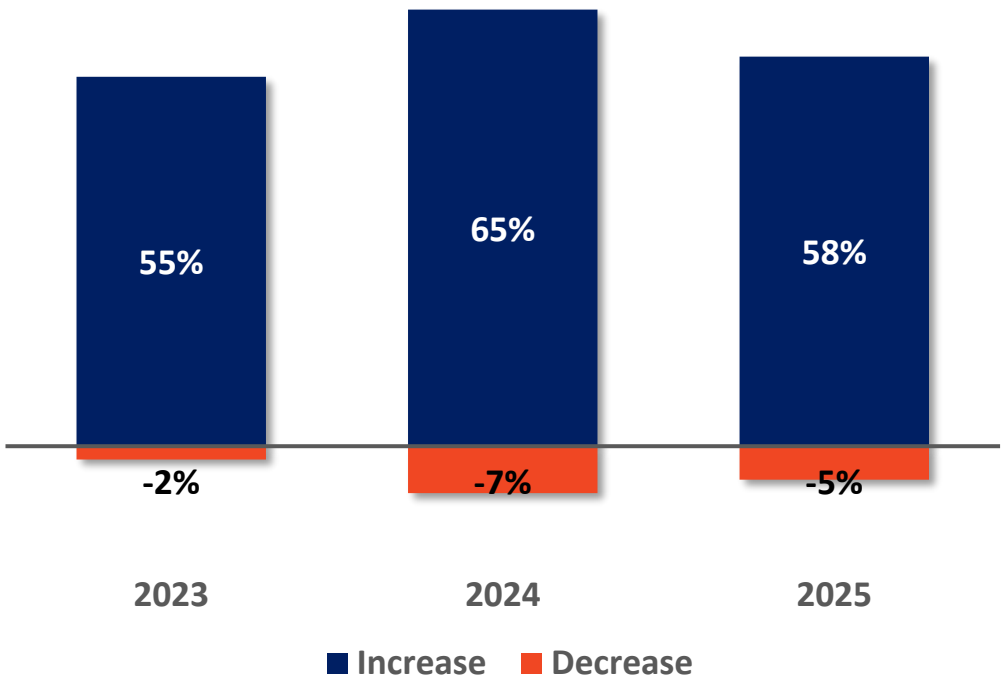


Q25: In the coming year, what impact will the following factors below have on event gifting?

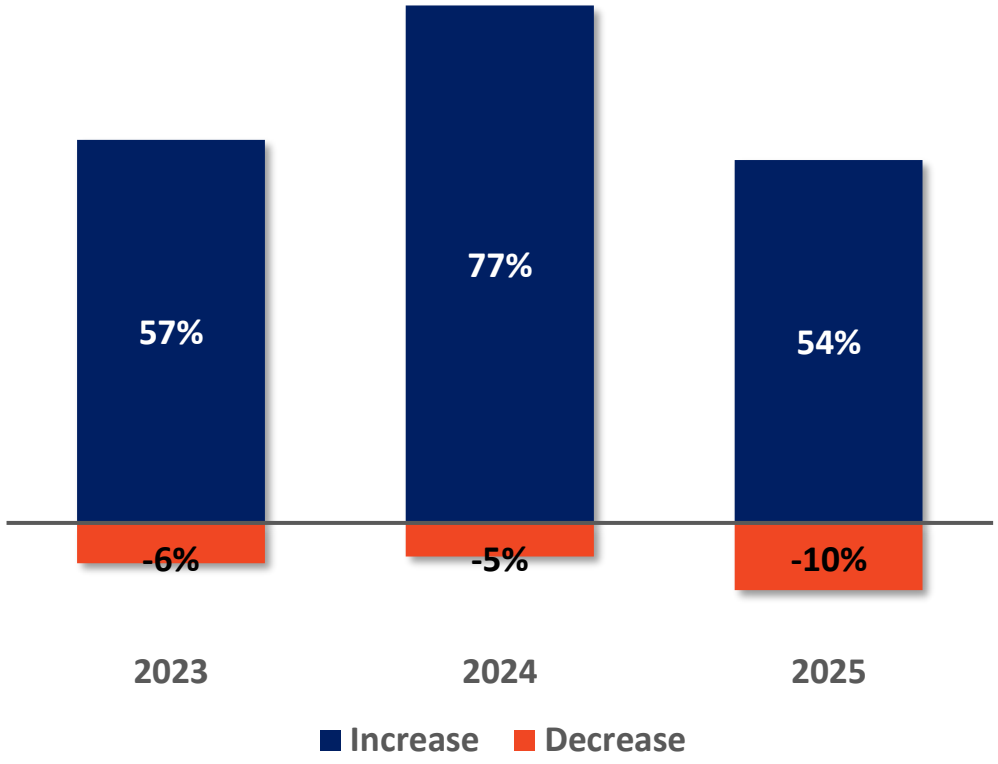
Event Gifting Budgets

Event gifting budgets are expected to increase in 2026, but not as drastic as this past year

Anticipated Changes in North American Event Gifting Budgets



Anticipated Changes in European Event Gifting Budgets

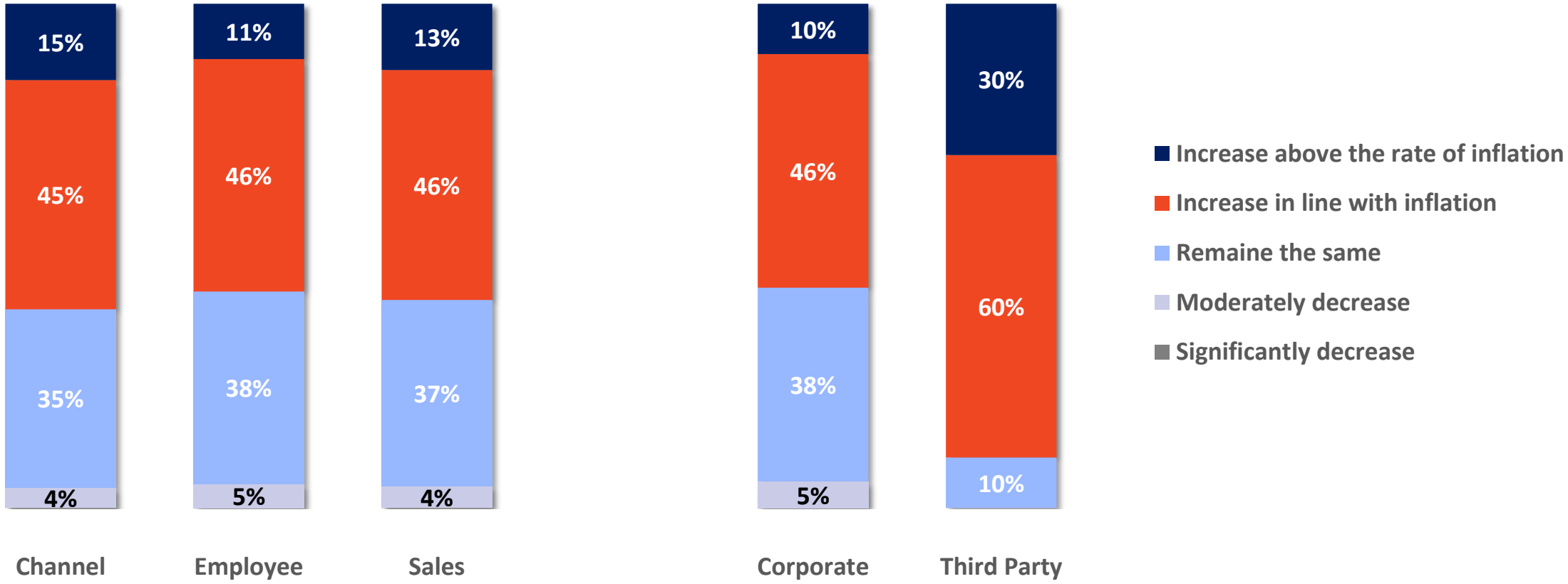


Q41: Which of the below best describes your expectations for event gifting budgets for 2026?

Event Gifting Budgets

In North America, most event gifting budget increases are expected to be in line with inflation rates

Anticipated Changes in North American Event Gifting Budgets

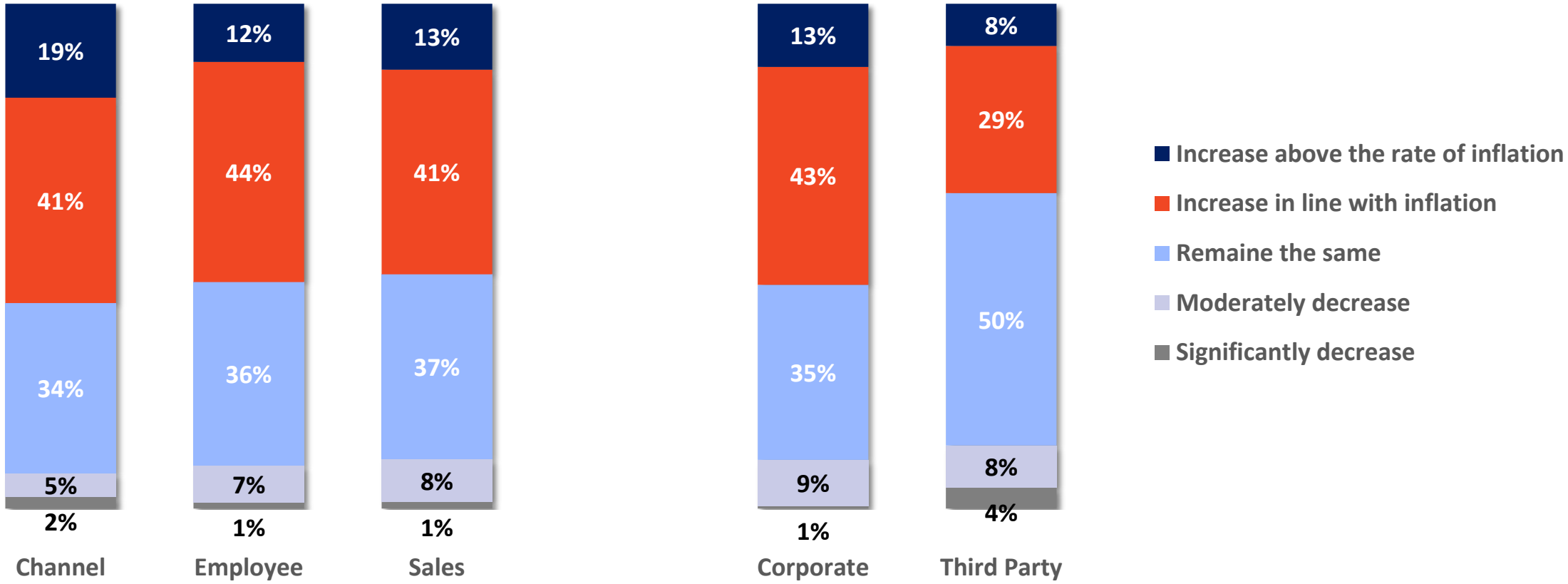


Q41: Which of the below best describes your expectations for event gifting budgets for 2026?

Event Gifting Budgets

In Europe, most event gifting budget increases are expected to be in line with inflation rates

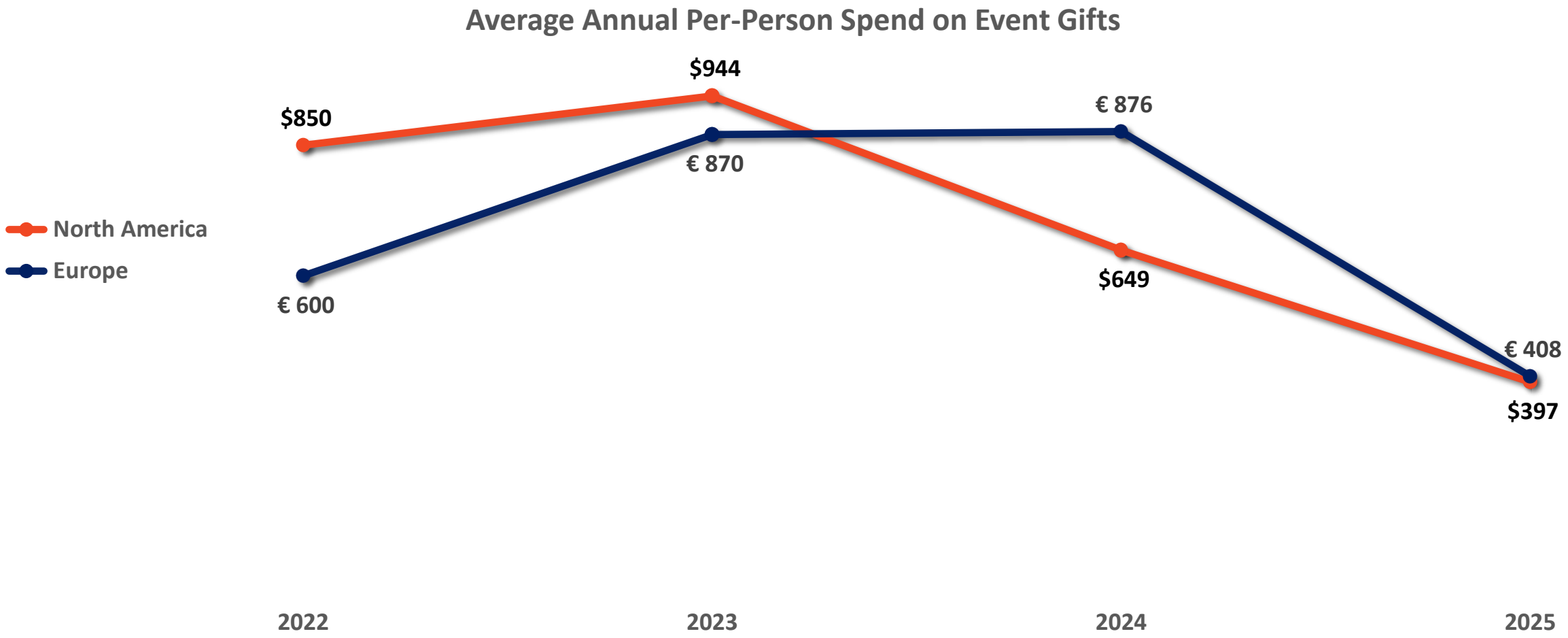
Anticipated Changes in European Event Gifting Budgets



Q41: Which of the below best describes your expectations for event gifting budgets for 2026?

Annual Event Gift Spending

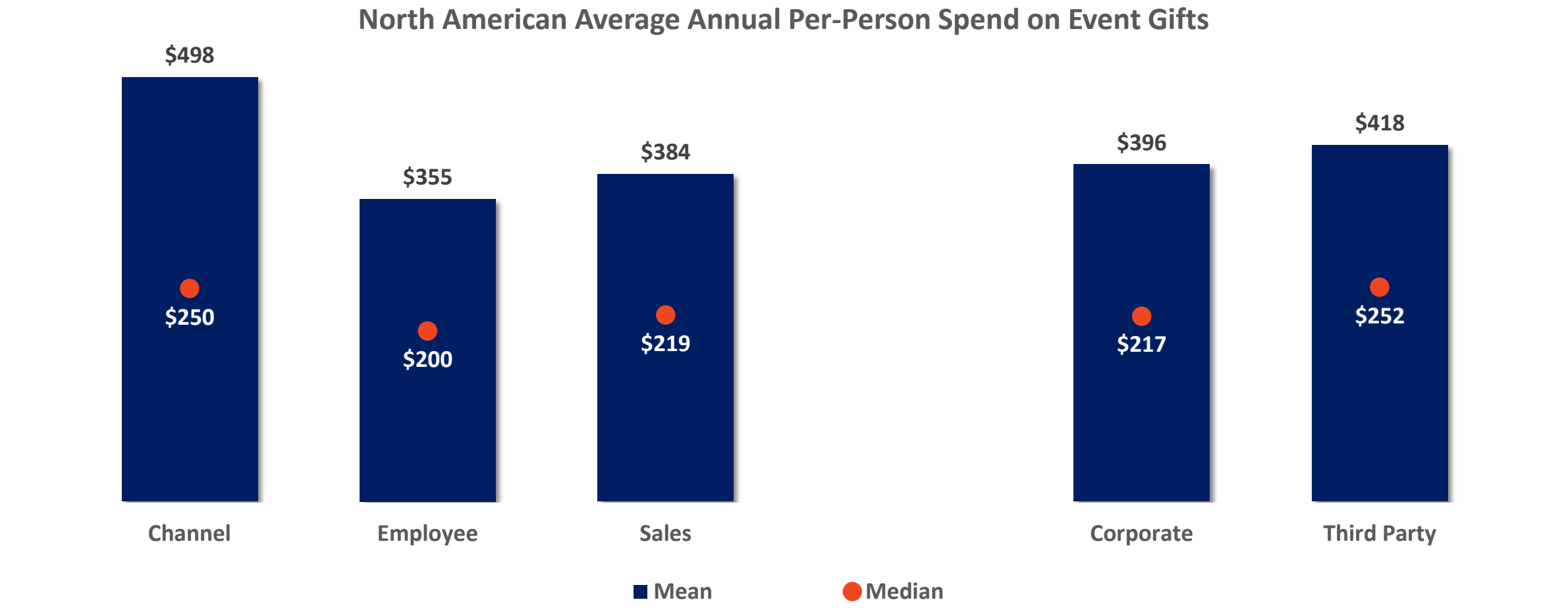
Average annual per-person spend on event gifts declines sharply in Europe and steadily in North America



Q33: On average, what is the annual per-person spend on event gifts for your [channel/employee/sales] program?

Annual Event Gift Spending

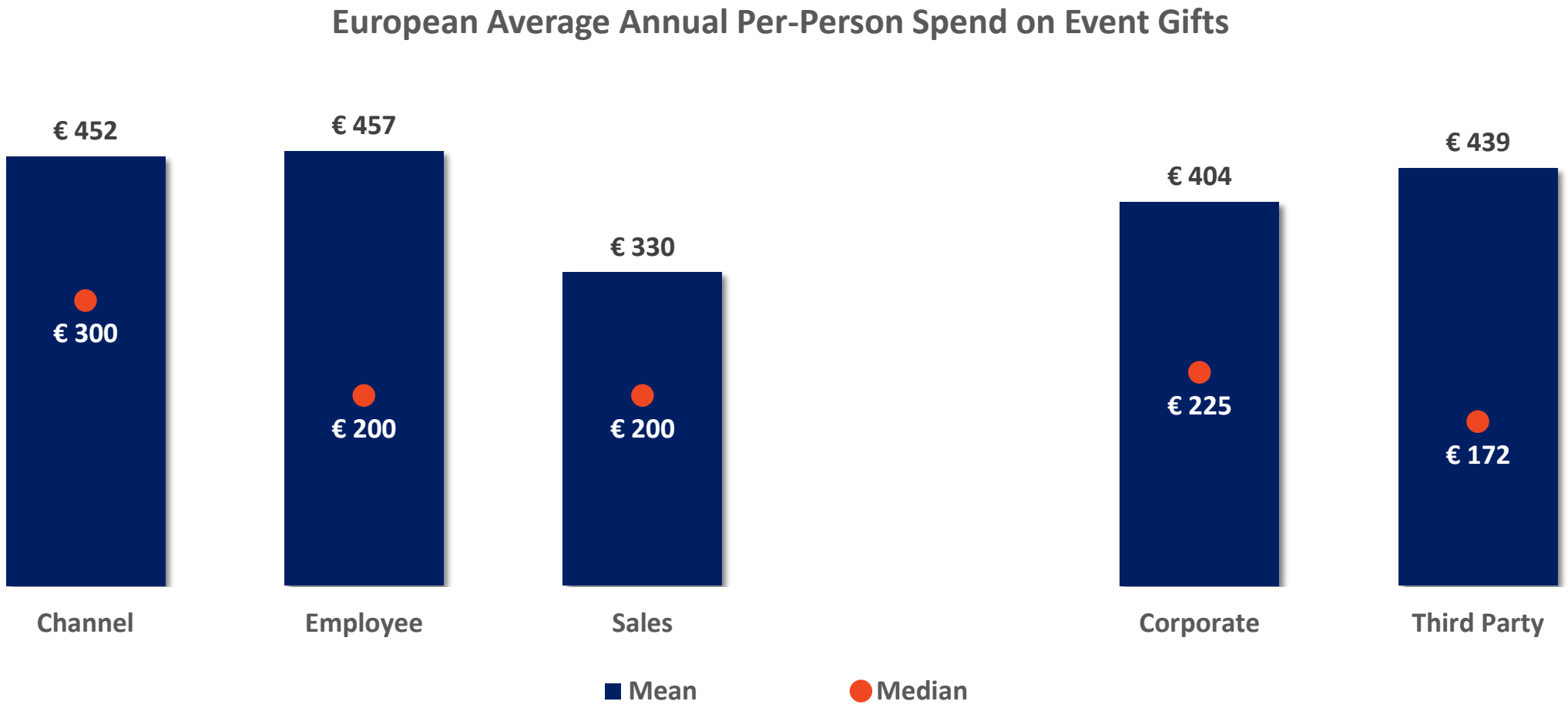
North American channel programs spend more per person on event gifts



Q33: On average, what is the annual per-person spend on event gifts for your [channel/employee/sales] program?

Annual Event Gift Spending

In Europe, channel and employee programs spend more per person on event gifts than sales programs

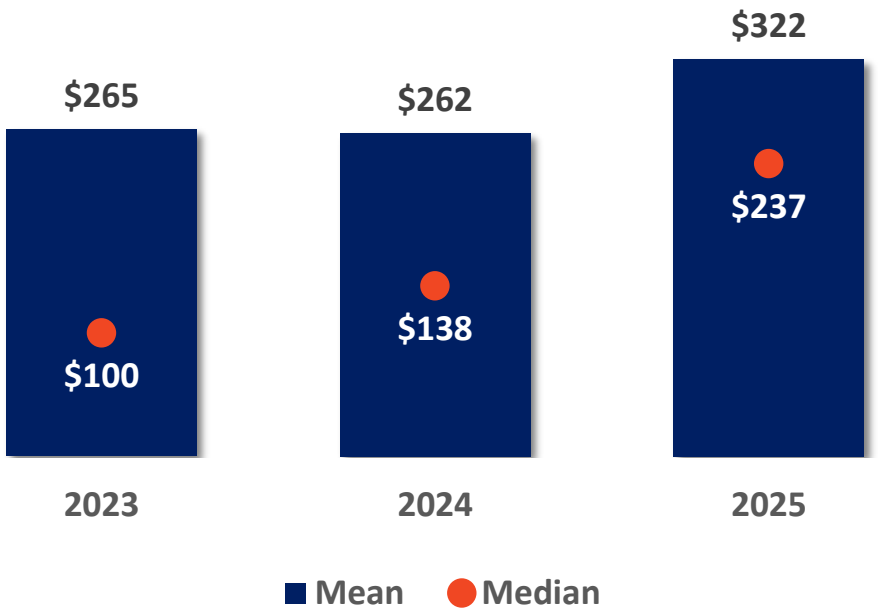


Q33: On average, what is the annual per-person spend on event gifts for your [channel/employee/sales] program?

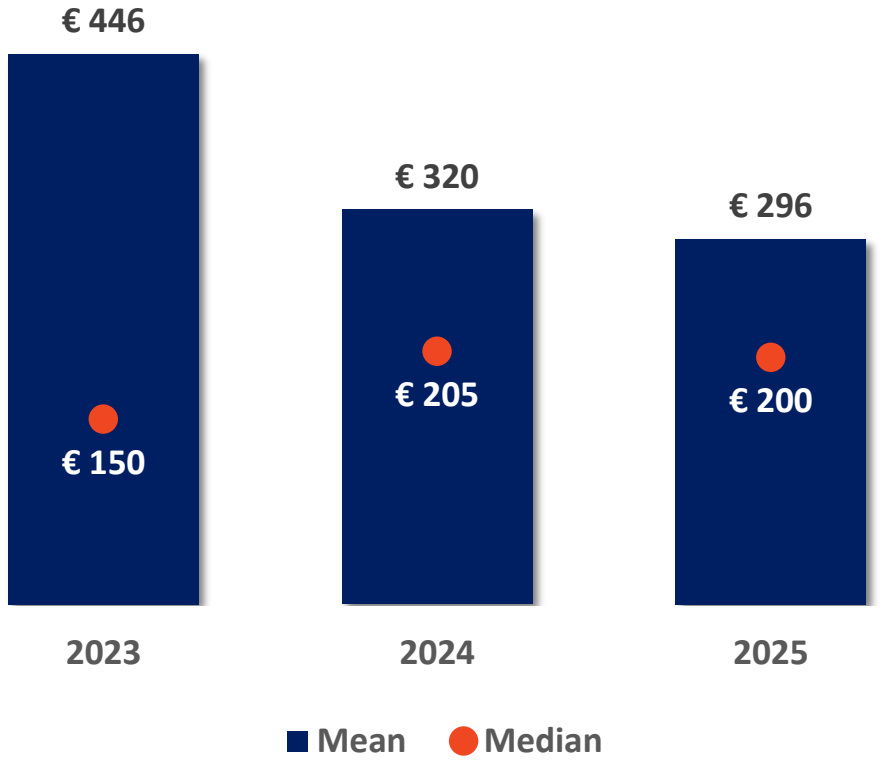
Event Gift Spending: Speakers

Average event gift spend for speakers climbs in North America, while dropping slightly in Europe

North American Average Event Gift Spend Per Speaker



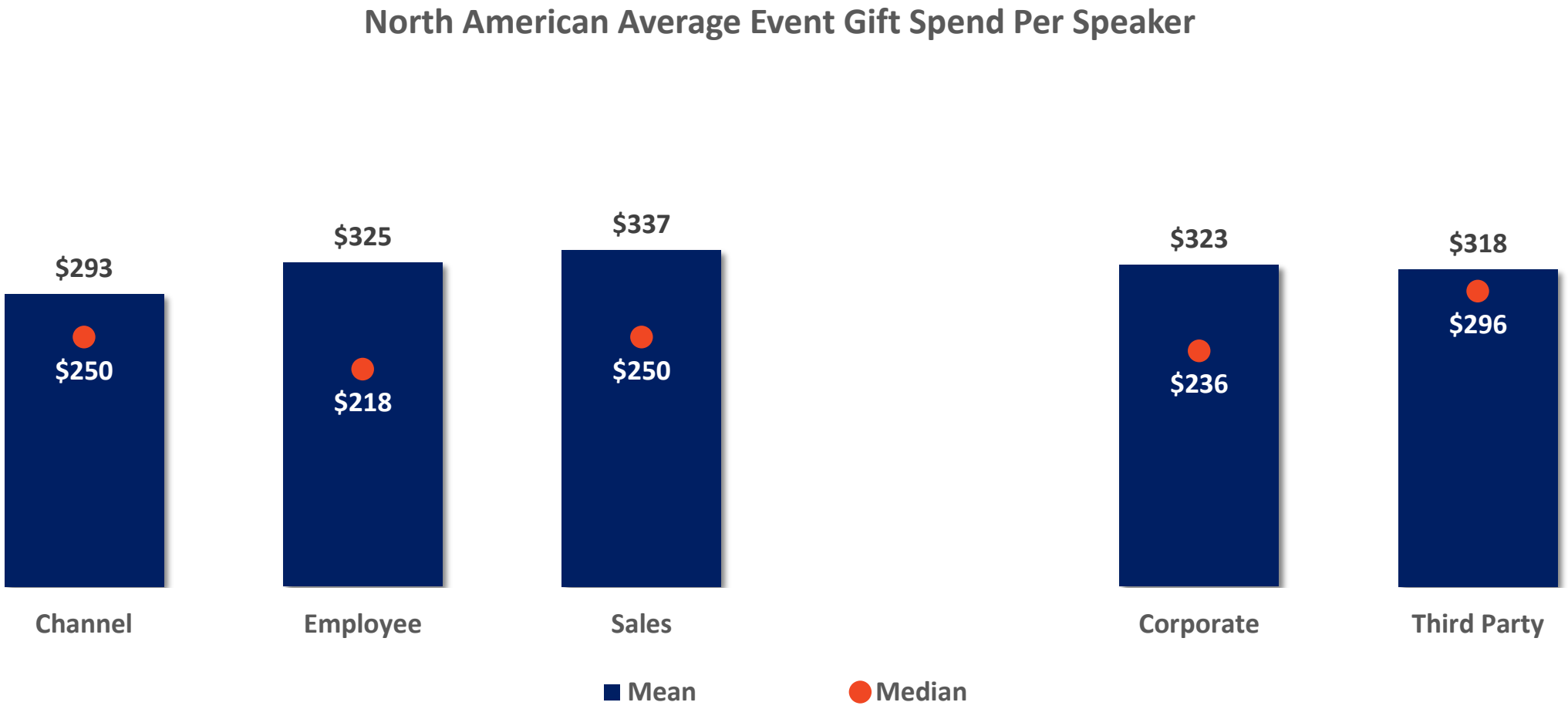
European Average Event Gift Spend Per Speaker



Q40: What is the approximate per-attendee spend on event gifts for your [channel/employee/sales] program?

Event Gift Spending: Speakers

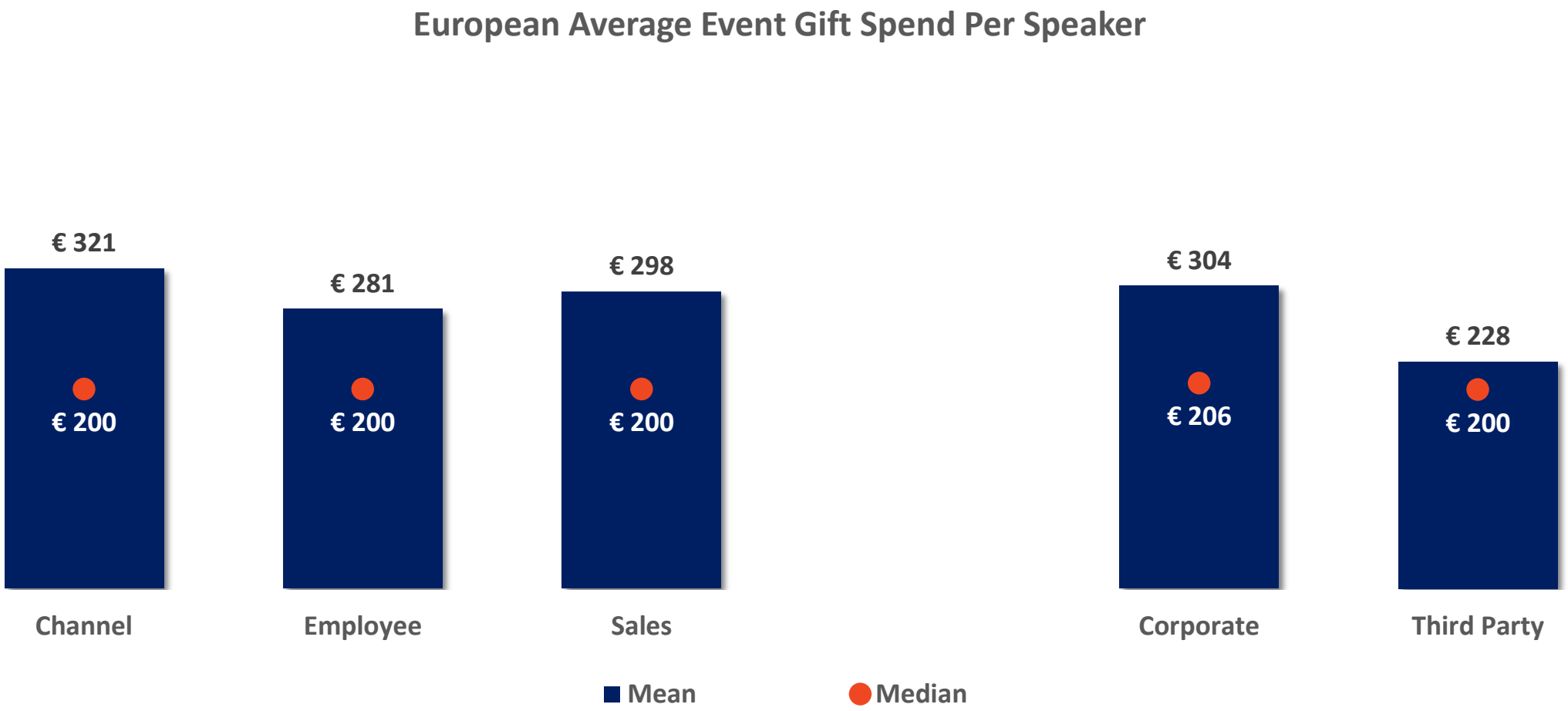
North American employee and sales programs spend more on event gifts for speakers



Q40: What is the approximate per-attendee spend on event gifts for your [channel/employee/sales] program?

Event Gift Spending: Speakers

In Europe, corporate entities spend more than third parties on event gifts for speakers

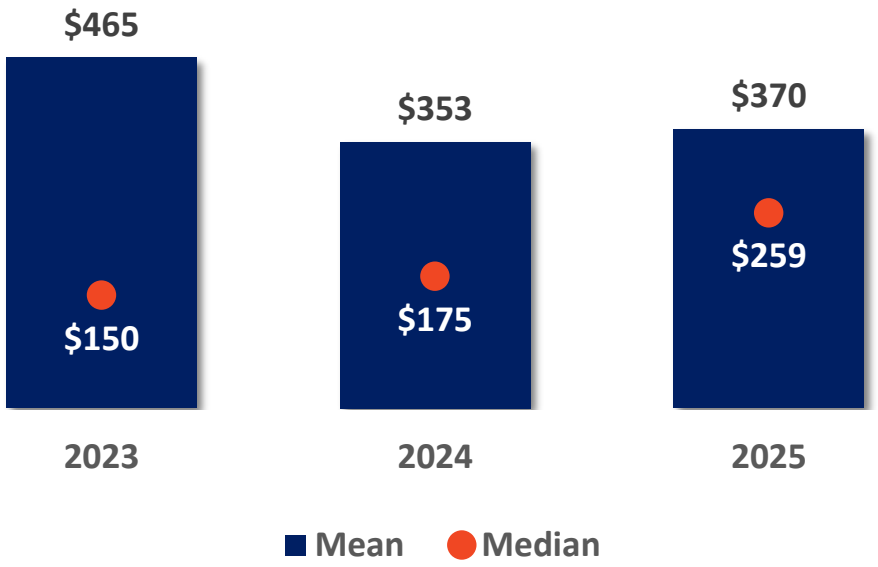


Q40: What is the approximate per-attendee spend on event gifts for your [channel/employee/sales] program?

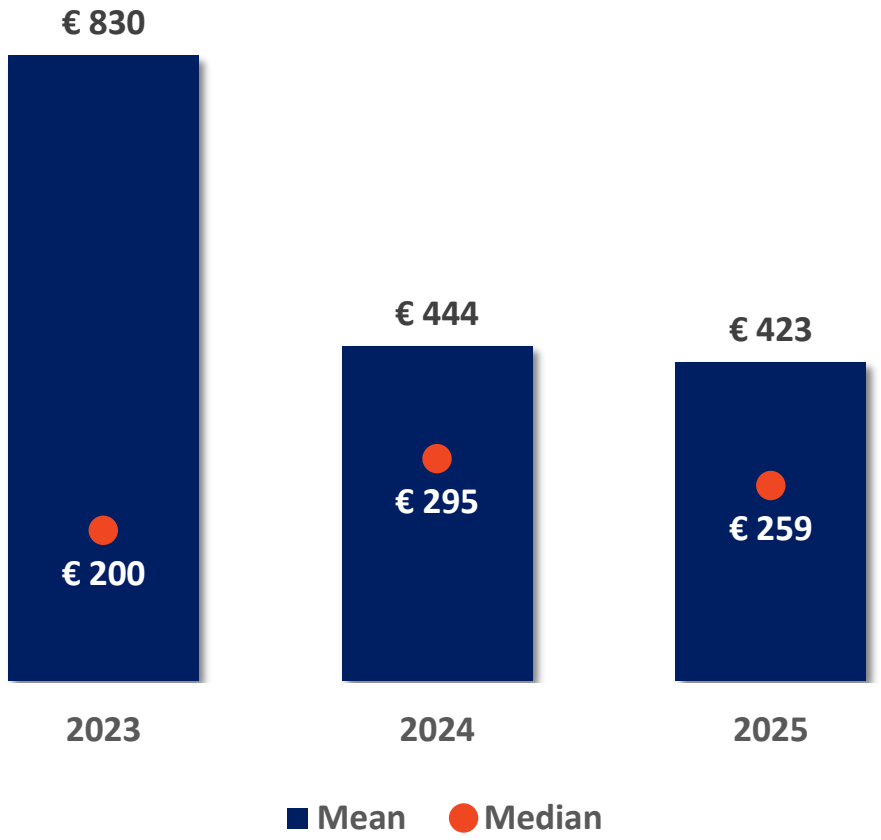
Event Gift Spending: VIPs

Event gift spending on VIPs remains relatively steady

North American Average Event Gift Spend Per VIP



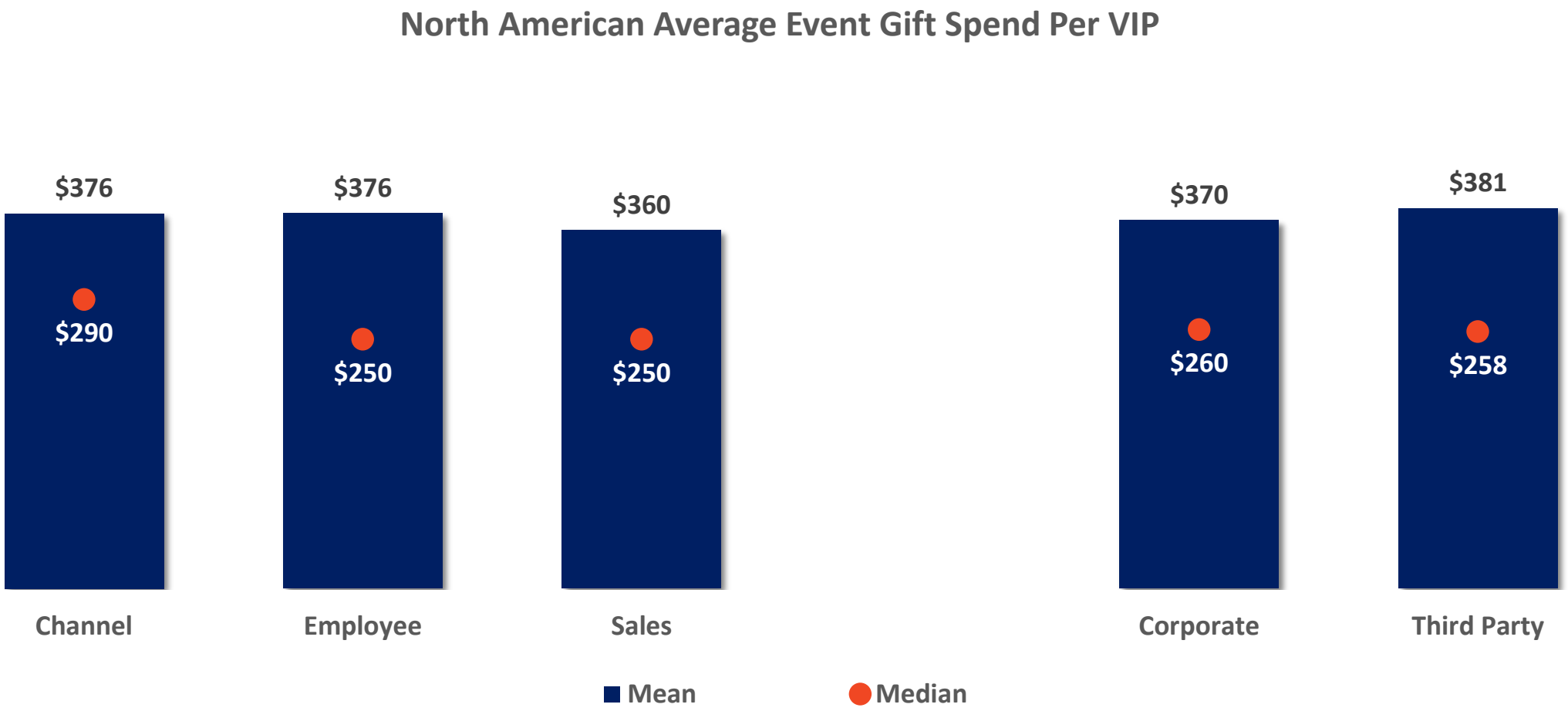
European Average Event Gift Spend Per VIP



Q40: What is the approximate per-attendee spend on event gifts for your [channel/employee/sales] program?

Event Gift Spending: VIPs

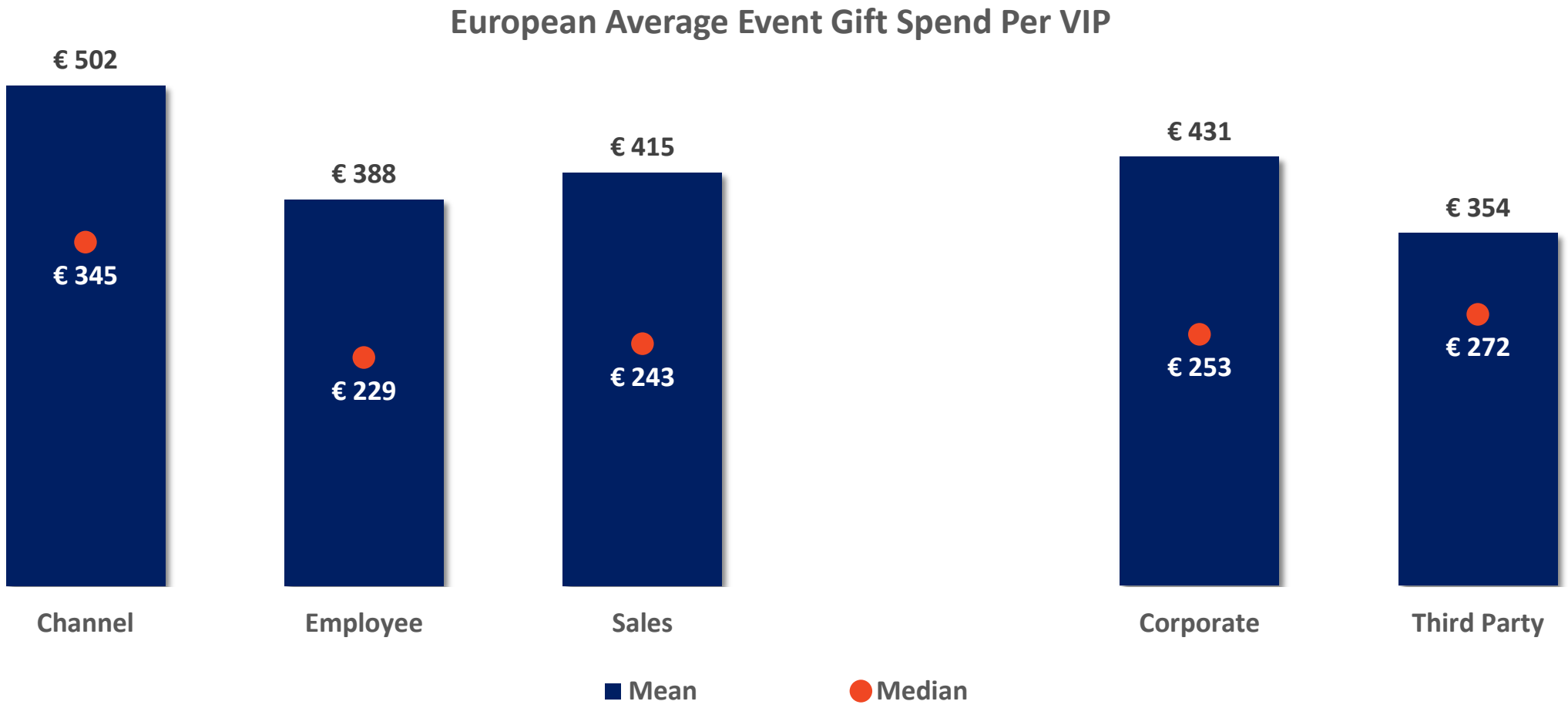
All program types spend similar amounts on event gifts for VIPs



Q40: What is the approximate per-attendee spend on event gifts for your [channel/employee/sales] program?

Event Gift Spending: VIPs

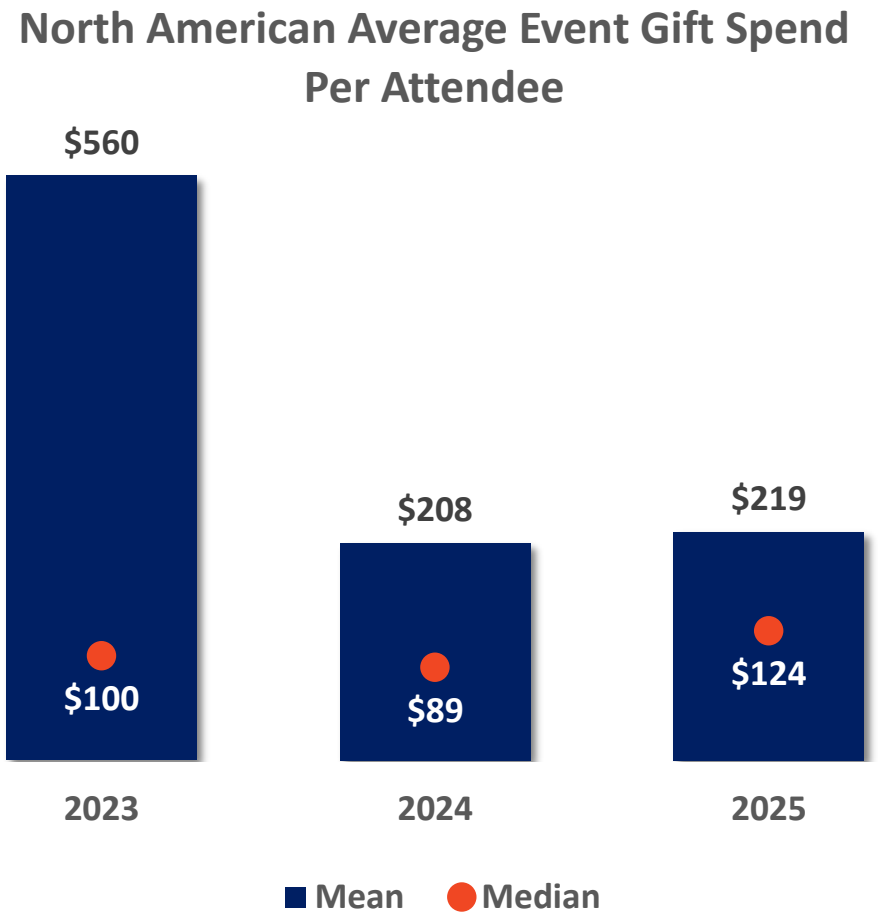
European channel programs and corporate entities invest most in event gifts for VIPs

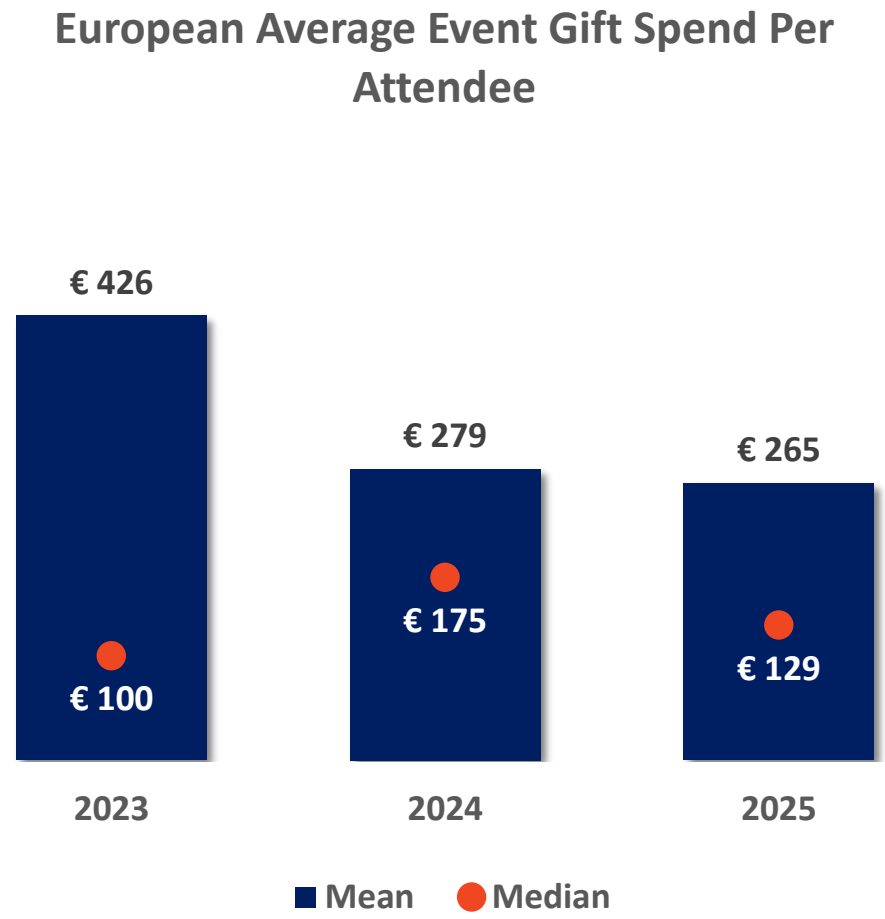


Q40: What is the approximate per-attendee spend on event gifts for your [channel/employee/sales] program?

Event Gift Spending: Attendees

Spending on event gifts for attendees remains relatively consistent

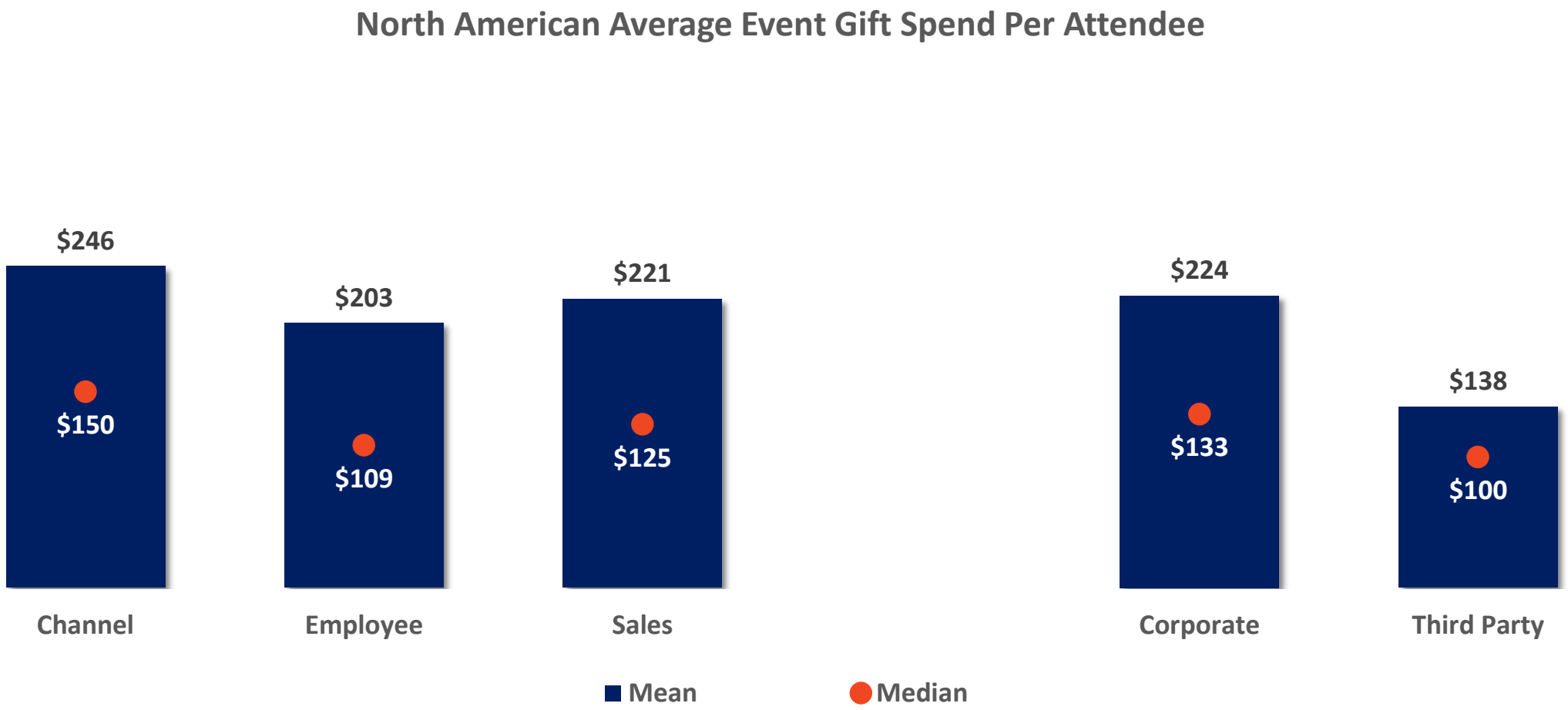




Q40: What is the approximate per-attendee spend on event gifts for your [channel/employee/sales] program?

Event Gift Spending: Attendees

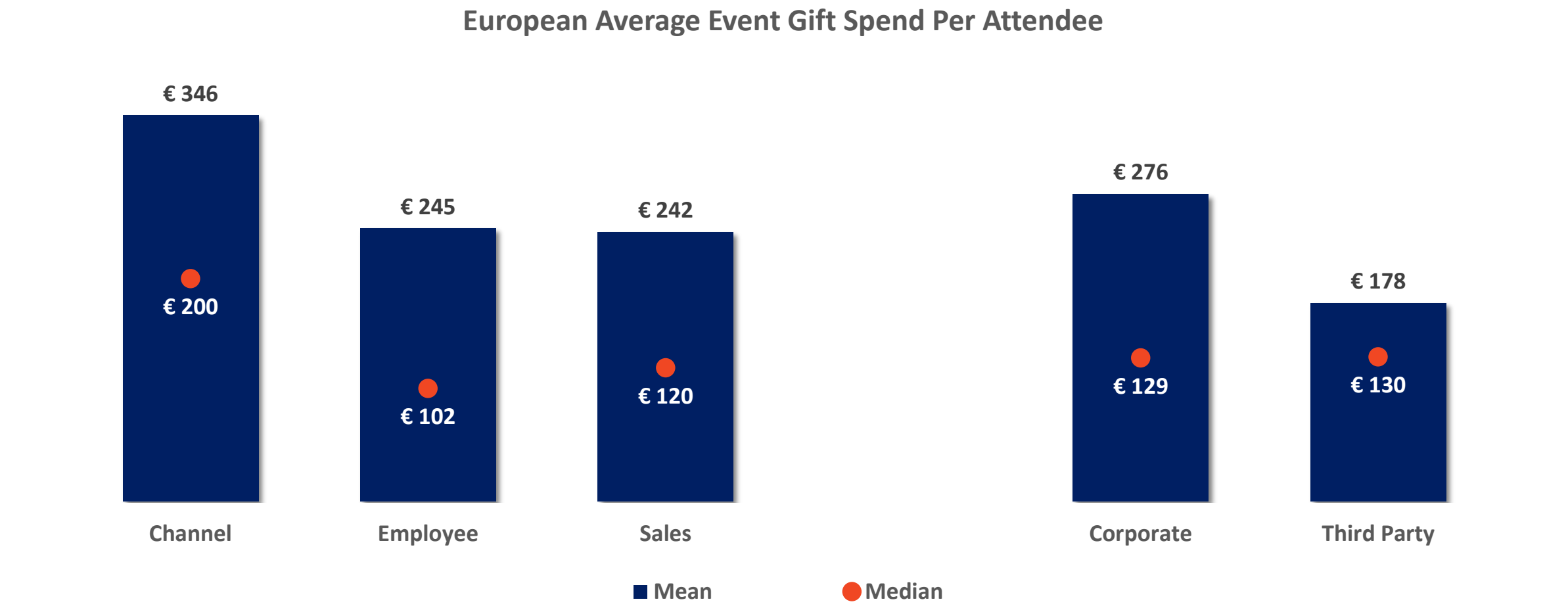
North American third parties spend significantly less on event gifts for attendees than corporate entities



Q40: What is the approximate per-attendee spend on event gifts for your [channel/employee/sales] program?

Event Gift Spending: Attendees

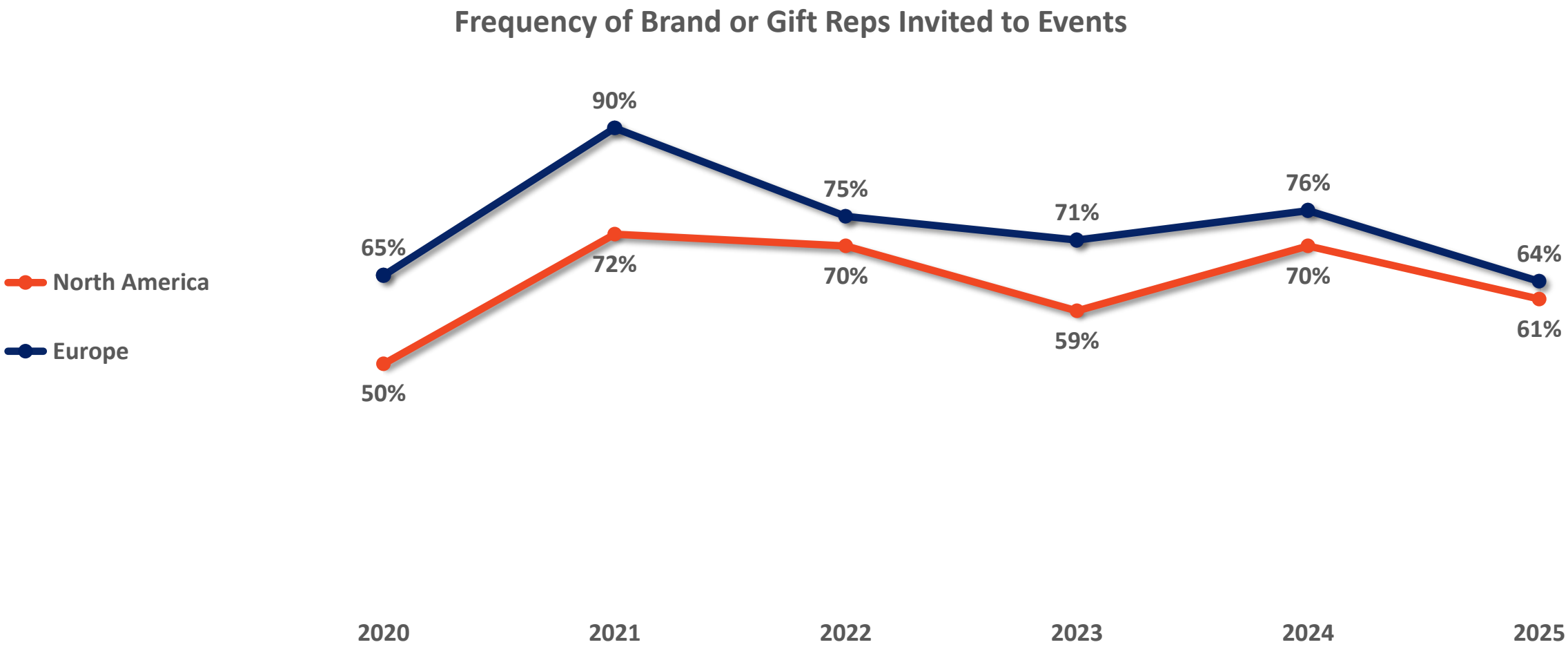
In Europe, channel programs and corporate organizations spend more on event gifts for attendees



Q40: What is the approximate per-attendee spend on event gifts for your [channel/employee/sales] program?

Interaction with Brand Representatives

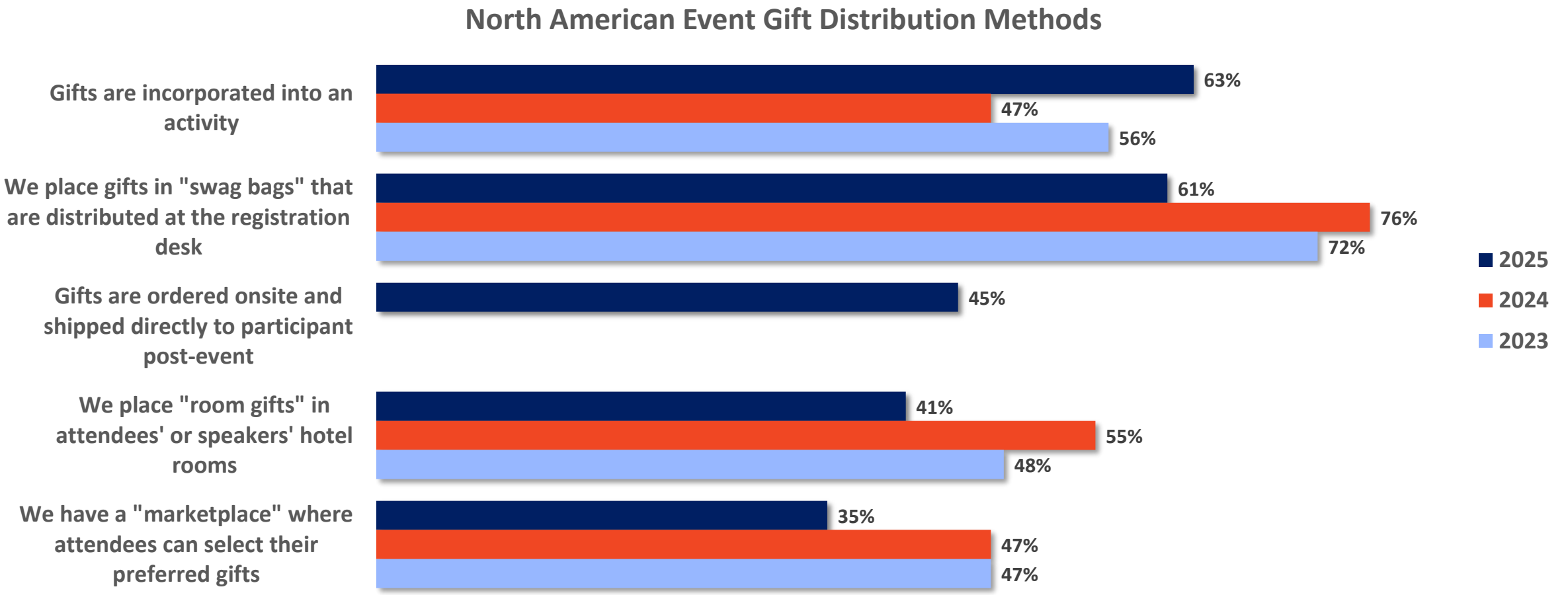
Fewer organizations are inviting brand or gift representatives to events compared with recent years



Q38: Do you invite representatives of the brand or gift to events to engage with attendees?

Event Gift Distribution

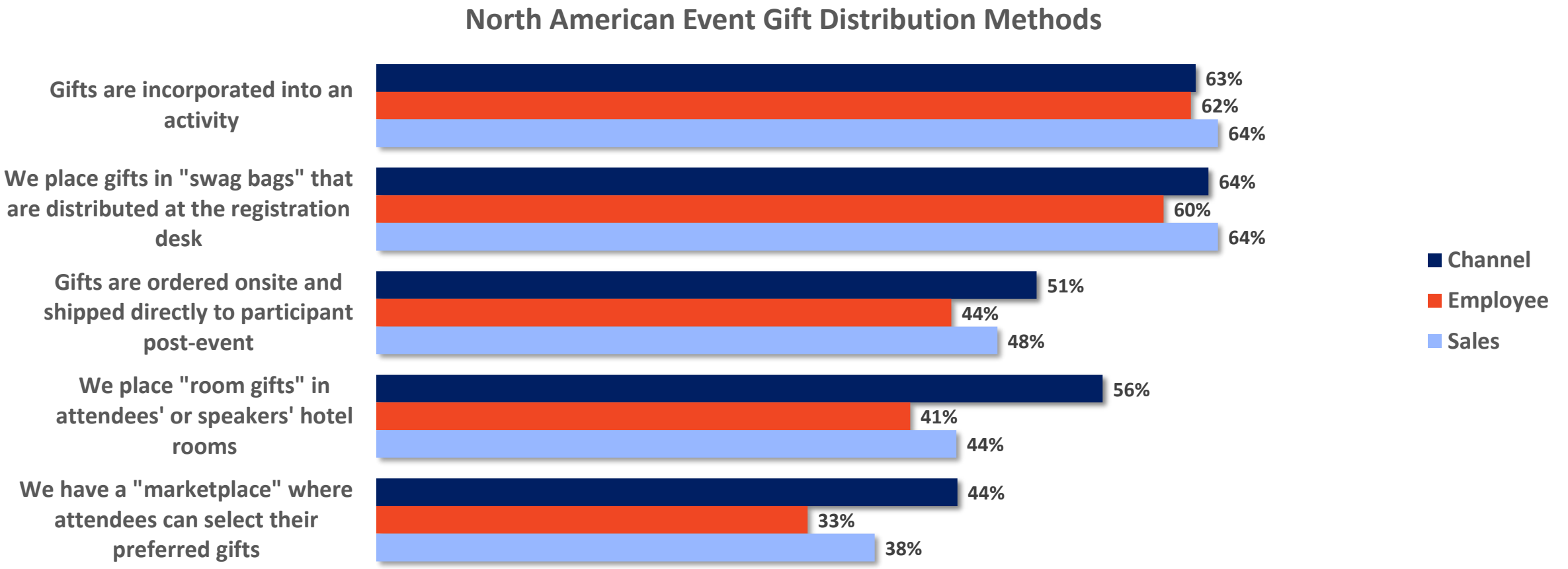
Incorporating event gifts into an activity is increasing in popularity in North America



Q39: Which of the following describe(s) how you distribute event gifts?

Event Gift Distribution

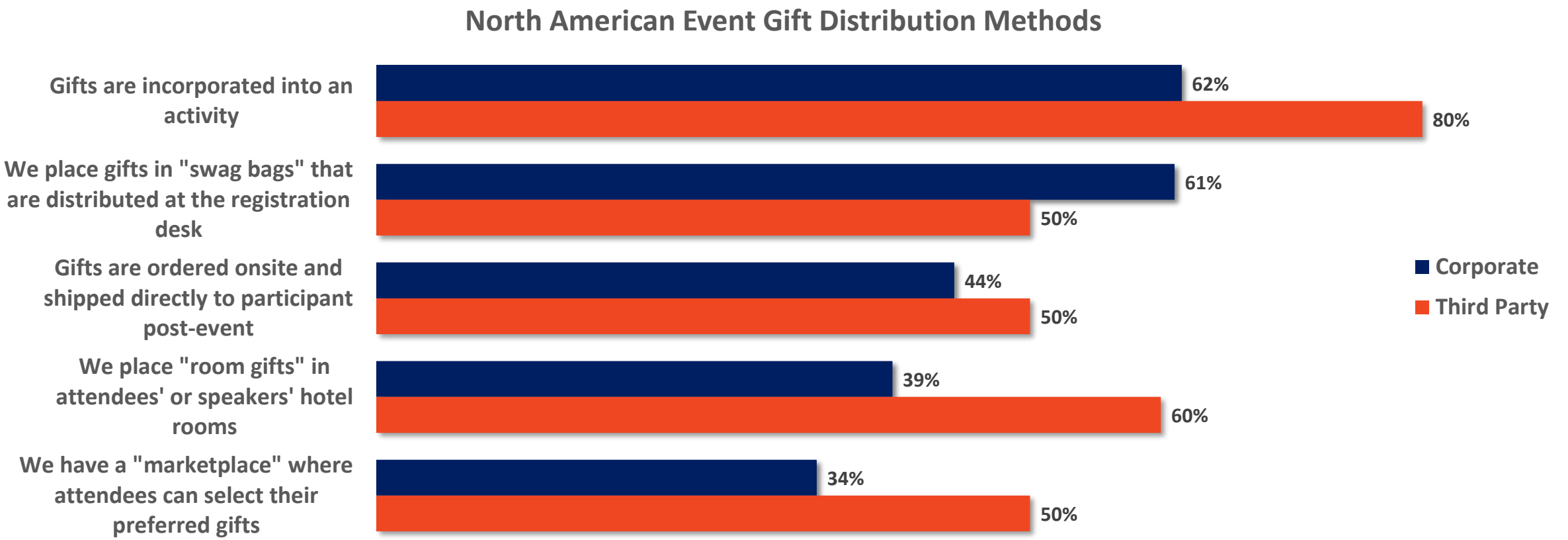
North American channel programs are more likely to use a wide array of event gift distribution methods



Q39: Which of the following describe(s) how you distribute event gifts?

Event Gift Distribution

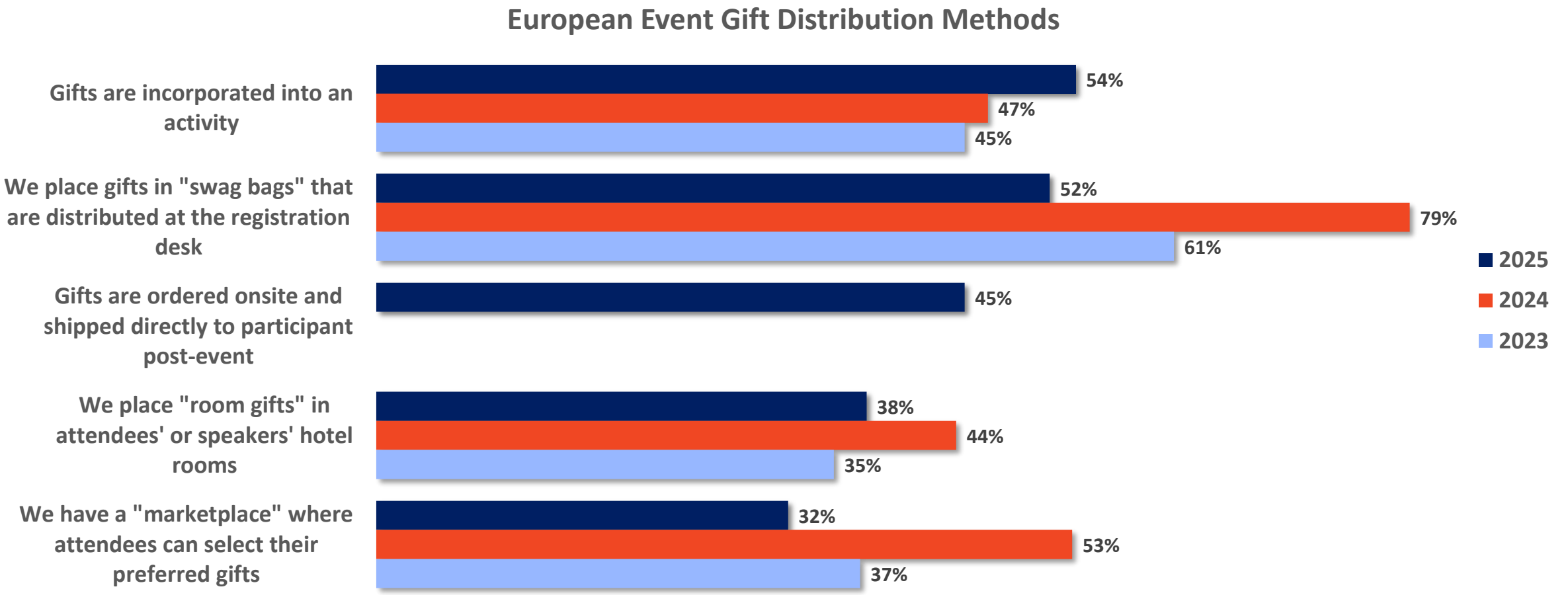
In North America, third parties favor event gifting through activities or placed in hotel rooms, while corporate entities use “swag bags” more often



Q39: Which of the following describe(s) how you distribute event gifts?

Event Gift Distribution

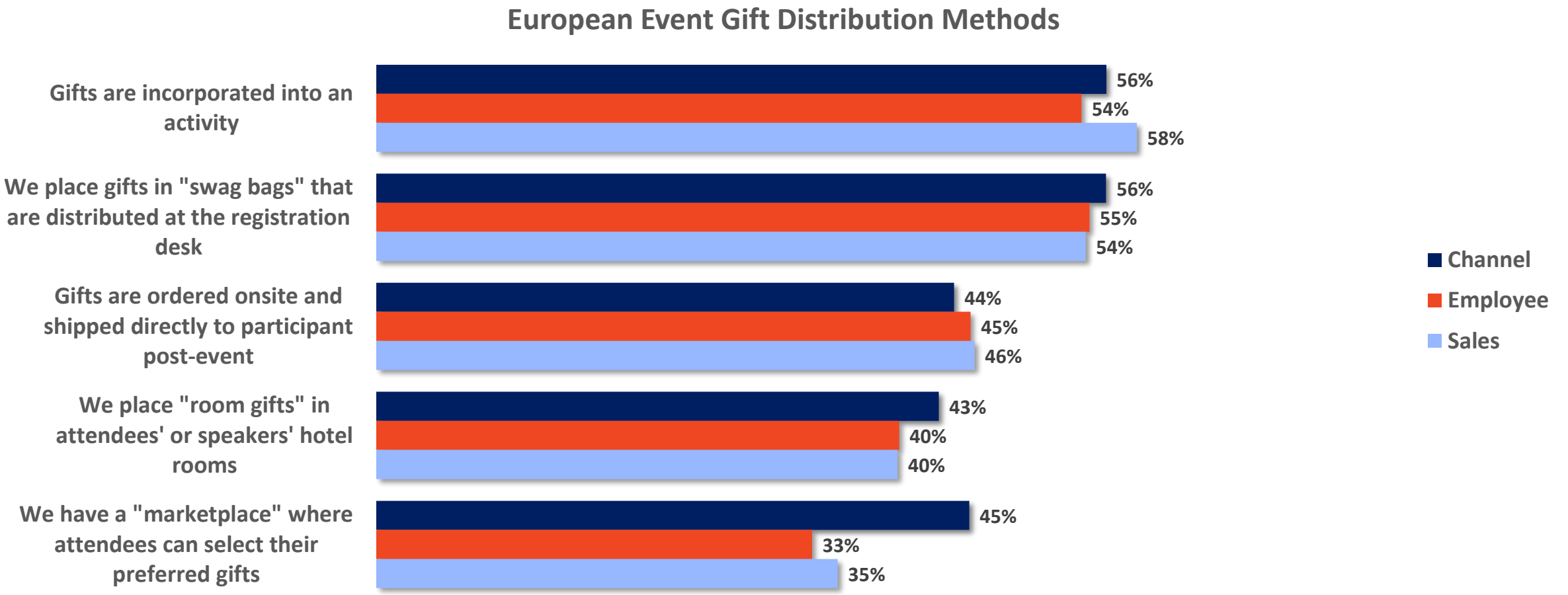
The use of “swag bags” for event gifts is declining in Europe, as gifts are increasingly integrated into activities



Q39: Which of the following describe(s) how you distribute event gifts?

Event Gift Distribution

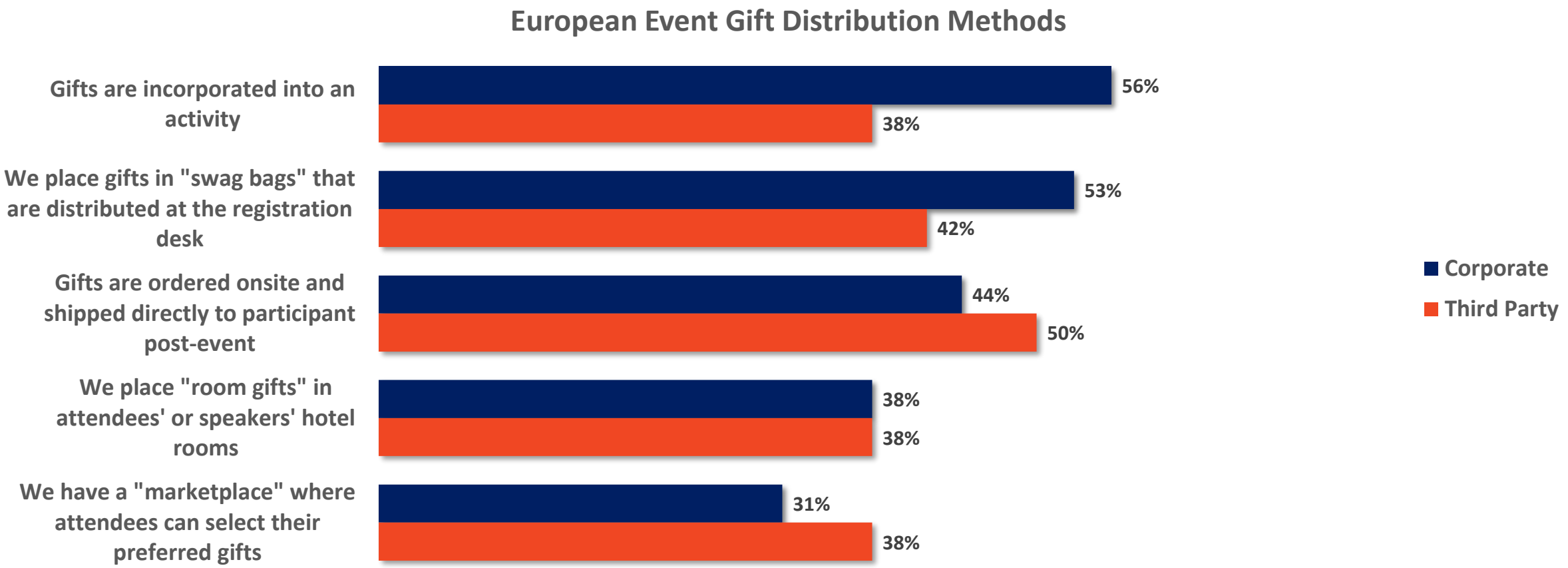
Employing a “marketplace” strategy for event gift distribution is most popular with channel programs



Q39: Which of the following describe(s) how you distribute event gifts?

Event Gift Distribution

European corporations favor incorporating gifts into activities or providing “swag bags,” while third parties leverage direct shipping and marketplace methods



Q39: Which of the following describe(s) how you distribute event gifts?

Appendix

North American Branded Gift Card Use

	Total	Corporate	Third Party	Channel	Employee	Sales
Dining/restaurants	54%	55%	33%	49%	52%	51%
Online-only retailers	50%	49%	67%	45%	50%	47%
Clothing and apparel	48%	48%	50%	53%	46%	50%
Coffee shops	46%	47%	17%	42%	45%	43%
General big-box stores	45%	46%	17%	45%	45%	45%
Electronics retailers	42%	41%	50%	42%	43%	42%
Grocery stores	40%	39%	50%	44%	38%	39%
Online subscription services	38%	37%	50%	40%	36%	39%
Beauty retailers	36%	36%	33%	38%	35%	37%
Department stores	33%	32%	50%	33%	33%	33%
Home improvement stores	32%	32%	33%	34%	33%	33%
Music and movies	30%	31%	17%	34%	28%	32%
Sporting goods stores	29%	29%	33%	33%	28%	31%
Gas stations	24%	24%	33%	25%	24%	26%
Accessories and jewelry	23%	22%	33%	30%	21%	25%
Travel services	20%	21%	0%	27%	19%	24%
Bookstores	19%	20%	0%	21%	18%	20%
Sunglasses retailers	15%	15%	33%	21%	16%	17%
Drugstores/pharmacies	13%	13%	17%	15%	12%	11%
Other (please specify):	1%	1%	0%	0%	1%	1%

Q45: Which of the options below best describes the types of merchants selected when your company buys BRANDED gift cards for your non-cash rewards programs?

European Branded Gift Card Use

	Total	Corporate	Third Party	Channel	Employee	Sales
Online-only retailers	43%	41%	62%	37%	42%	43%
Electronics retailers	36%	38%	23%	31%	35%	38%
Clothing and apparel	35%	33%	46%	30%	38%	35%
Dining/restaurants	33%	35%	15%	24%	35%	36%
Travel services	33%	34%	23%	36%	34%	37%
Beauty retailers	32%	32%	23%	28%	35%	32%
Online subscription services	32%	32%	23%	27%	32%	31%
Department stores	30%	32%	15%	31%	32%	31%
General big-box stores	29%	31%	15%	22%	32%	25%
Coffee shops	28%	27%	31%	19%	30%	27%
Sporting goods stores	28%	28%	23%	28%	28%	30%
Grocery stores	27%	28%	15%	22%	29%	27%
Music and movies	22%	22%	23%	25%	21%	26%
Accessories and jewelry	22%	22%	15%	22%	22%	22%
Gas stations	19%	19%	23%	24%	21%	21%
Bookstores	18%	20%	8%	16%	18%	20%
Sunglasses retailers	18%	19%	8%	19%	19%	18%
Home improvement stores	18%	19%	8%	12%	20%	17%
Drugstores/pharmacies	12%	13%	0%	15%	13%	12%
Unsure	1%	1%	0%	0%	1%	1%

Q45: Which of the options below best describes the types of merchants selected when your company buys BRANDED gift cards for your non-cash rewards programs?