

2018 INCENTIVE TRAVEL MARKET SURVEY

SURVEY DATA SUMMARY

As Meetings + Incentive Travel's 2018 Incentive Travel Market Survey makes clear, the industry is maintaining stability, particularly where key metrics such as program spend and average group size are concerned. Moreover, C-suite/client buy-in is strong. "C-level execs still understand that incentive programs are considered a good investment that pay for themselves, as opposed to a questionable expense," wrote one survey respondent. "I feel that the information and stats available to prove that incentive travel works are far more available," said another. Still, challenges persist. Beyond grappling with the perennial issue of rising costs — this year's survey reveals that airfares, f&b and hotel rooms, in that order, gobbled up an increasingly large share of 2017 program budgets, year over year — planners said it's becoming more and more difficult to engage and/or 'wow' program participants. "A large percentage of the younger generation considers a trip won to be their own time. And you better engage their attention quickly or they will go back to their phones/screens in a heartbeat," noted one respondent. Another respondent said their major challenge when planning a program was the "expectations of participants. Some of our trip winners travel a lot and have been to many countries and destinations." Global geopolitics continue to affect destination choices. "We try to avoid areas where there are any issues," said one respondent; another reported, "groups with a high ethnic ownership are avoiding the potential hassles of the U.S." While technology is key to promoting programs, it can also present challenges, such as the difficulty of learning new registration systems while running events, and the proliferation of event apps offering different pricing and functionalities.

ABOUT THE SURVEY

The 2018 Incentive Travel Survey was conducted by Bramm Research Inc. on behalf of Meetings + Incentive Travel. The survey was fielded from early May 2018 to late June 2018. It drew 52 complete responses from planners (suppliers were excluded and incomplete surveys were not included in the calculations). The 2019 Incentive Travel Survey is scheduled to field in [we're not sure about this part].

NOTE: The above 'About the Survey' info was provided by Bramm Research

THE RESPONDENTS

27%
respondents



Corporate/
In-House Planner

24%
respondents



Independent or third-party
planner

18%
respondents



A planner or buyer working for
an incentive house or a marketing
or event services company that
plans incentive travel programs
for external clients

4%
respondents



Association planner

39%

Have been employed in
the industry for
20 or more years

92%

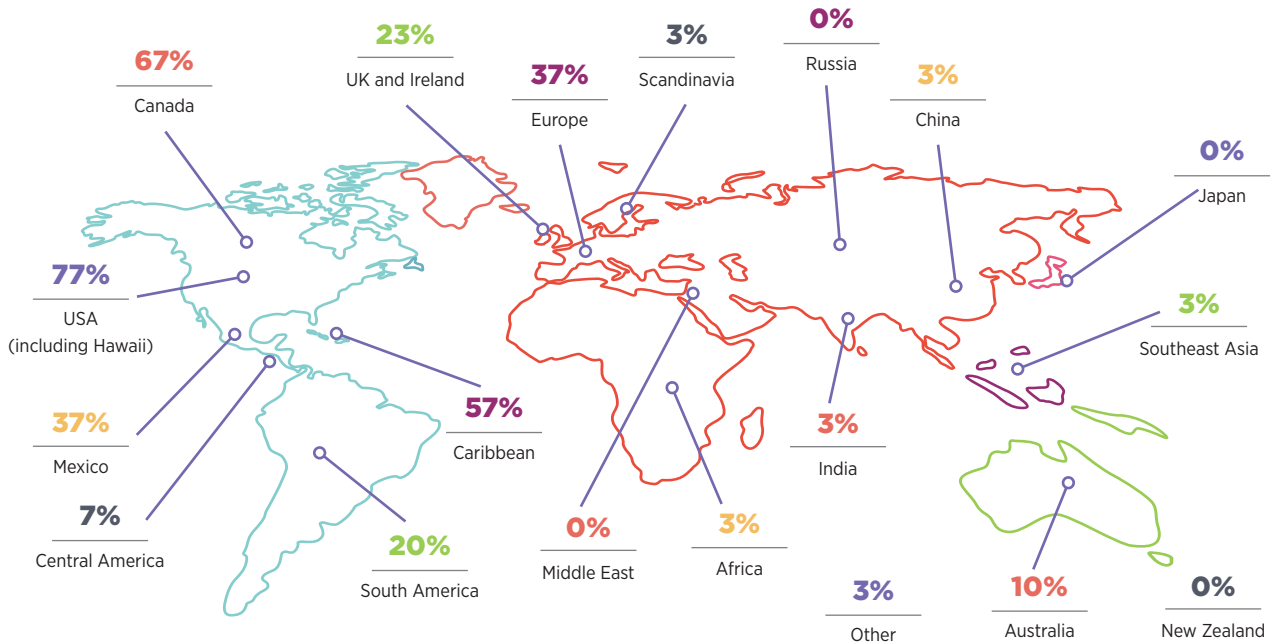
Have been employed in
the industry for at
least 5 years:

DESTINATION SUMMARY



In which of the following countries, if any, are you planning to hold your 2018 group incentive travel program(s)?

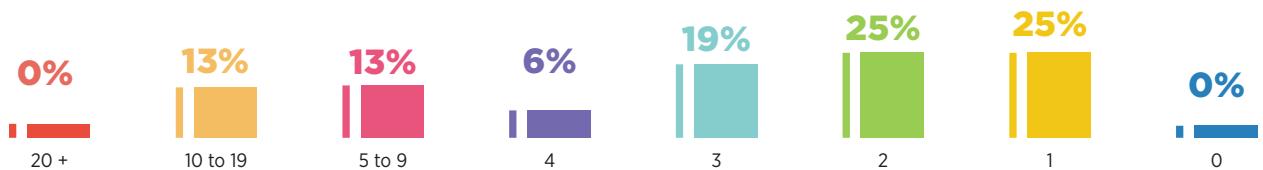
Respondents selected all destinations that applied



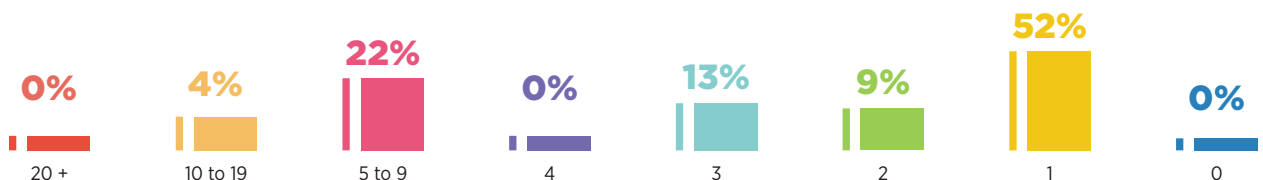
DESTINATION DETAILS

Approximately how many of the group incentive travel programs do you expect to plan in 2018 for each of the following countries/regions?

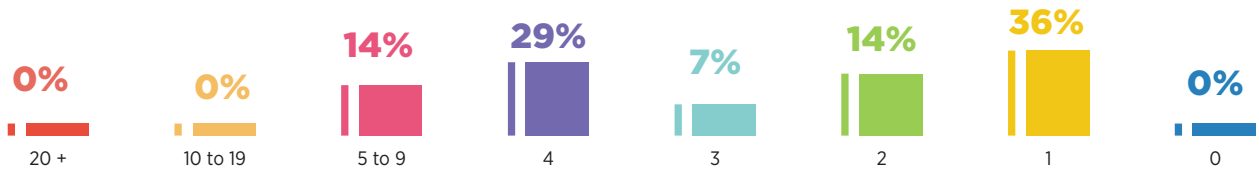
CANADA



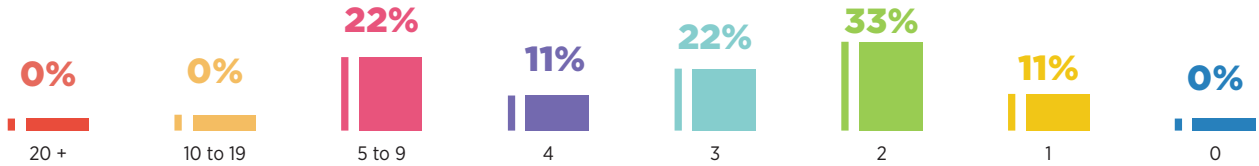
USA (INCLUDING HAWAII)



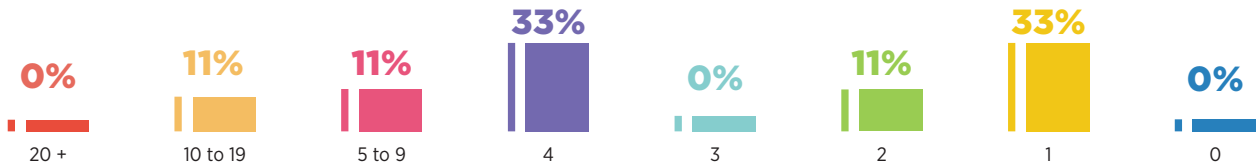
CARIBBEAN



EUROPE



MEXICO



Approximately how many of the incentive travel programs do you expect to plan for each of the following provinces/territories?

Newfoundland & Labrador	0%
Nova Scotia	24%
Prince Edward Island	0%
New Brunswick	5%
Quebec	48%
Ontario	62%
Manitoba	5%
Saskatchewan	0%
Alberta	29%
British Columbia	38%
The Yukon	0%
Northwest Territories	0%
Nunavut	0%

Approximately how many of the incentive travel programs do you expect to plan for each of the following states?

California	41%
Florida	32%
Arizona	18%
Hawaii	18%
Nevada	14%
Louisiana	9%
New York	9%
Texas	9%
Illinois	5%
Tennessee	5%
Alaska	0%
Colorado	0%
Massachusetts	0%
Washington, D.C.	0%
Other	27%

Approximately how many of the incentive travel programs do you expect to plan for each of the following countries/regions in the Caribbean?

Jamaica	44%
Aruba	31%
Dominican Republic	31%
Bahamas	19%
Barbados	13%
St Lucia	13%
Cayman Islands	6%
Other	19%

Approximately how many of the incentive travel programs do you expect to plan for each of the following countries/regions in Europe?

Portugal	60%
Spain	50%
Italy	30%
Czech Republic	20%
Croatia	20%
Switzerland	10%
Other	30%

PROGRAM SPEND

Approximately how much did your organization spend on group incentive travel in 2017?

Less than \$20,000	0%
\$20,000 to \$49,999	0%
\$50,000 to \$99,999	0%
\$100,000 to \$249,999	14%
\$250,000 to \$499,999	4%
\$500,000 to \$999,999	21%
\$1 to \$2.5 million	29%
More than \$2.5 million	32%

How much do you estimate will be spent in 2018 on group incentive travel?

Less than \$20,000	0%
\$20,000 to \$49,999	0%
\$50,000 to \$99,999	4%
\$100,000 to \$249,999	14%
\$250,000 to \$499,999	4%
\$500,000 to \$999,999	14%
\$1 to \$2.5 million	29%
More than \$2.5 million	36%

How much do you estimate will be spent, per program participant, on group incentive travel in 2018?

Less than \$1,500	4%
\$1,500 to \$1,999	4%
\$2,000 to \$2,499	7%
\$2,500 to \$2,999	11%
\$3,000 to \$3,499	11%
\$3,500 to \$3,999	11%
\$4,000 to \$5,000	25%
More than \$5,000	29%

On average, how much was spent, per program participant, on group incentive travel you planned in 2017?

Less than \$1,500	0%
\$1,500 to \$1,999	4%
\$2,000 to \$2,499	11%
\$2,500 to \$2,999	11%
\$3,000 to \$3,499	11%
\$3,500 to \$3,999	14%
\$4,000 to \$5,000	21%
More than \$5,000	29%

Approximately how much did your organization spend on individual incentive travel in 2017?

Less than \$20,000	33%
\$20,000 to \$49,999	0%
\$50,000 to \$99,999	17%
\$100,000 to \$249,999	17%
\$250,000 to \$499,999	0%
\$500,000 to \$999,999	33%
\$1 to \$2.5 million	0%
More than \$2.5 million	0%

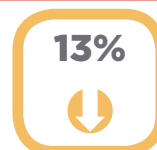
How much do you estimate will be spent in 2018 on individual incentive travel?

Less than \$20,000	33%
\$20,000 to \$49,999	0%
\$50,000 to \$99,999	33%
\$100,000 to \$249,999	0%
\$250,000 to \$499,999	0%
\$500,000 to \$999,999	33%
\$1 to \$2.5 million	0%
More than \$2.5 million	0%

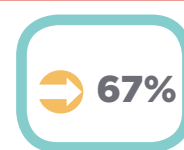
Would you say that the amount spent on incentive travel programs in 2018 will increase, decrease or stay the same, compared to 2017?



Amount spent will increase



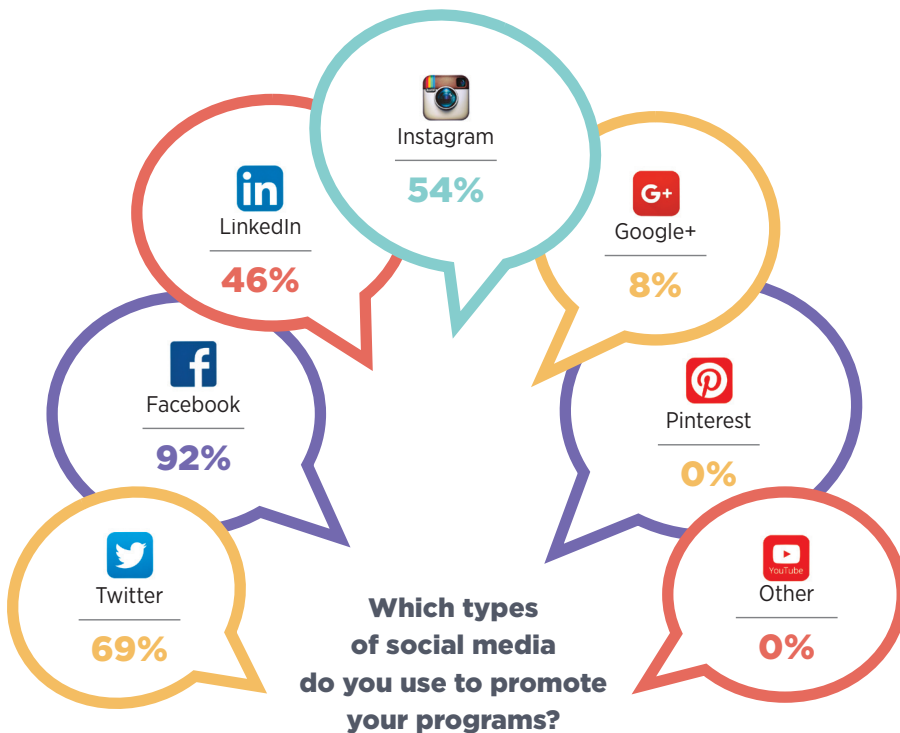
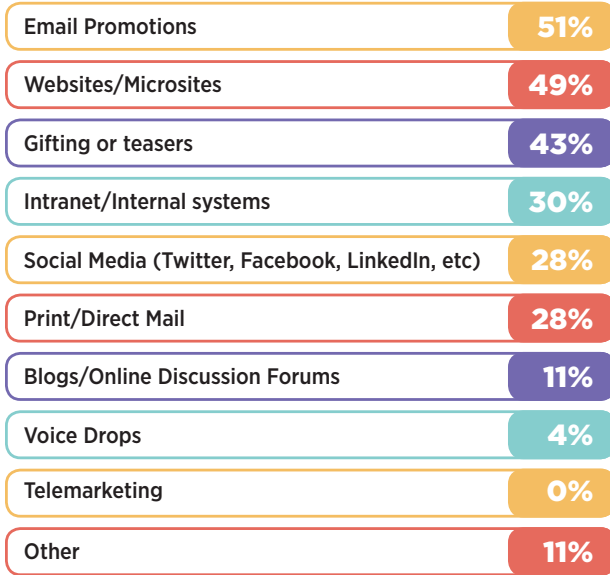
Amount spent will decrease



Amount spent will stay the same

MISCELLANEOUS STATS

What marketing methods or tactics do you use to promote reward/recognition incentive travel programs?



Which of the following incentive travel program components will you be incorporating into 2018 programs?



Food & wine appreciation
(e.g. cooking lessons, wine/
food pairing lessons, etc.)

72%



Art/Music
appreciation

21%



CSR component

31%



Sightseeing

69%



Cultural immersion
(e.g. tango lessons)

35%



Golf

55%



Spa

59%



Cruise

14%



Fitness (cycling,
walking tour, etc.)

41%



Adventure (kayaking,
dogsledding, hiking,
water-water rafting, etc.)

69%

Have you incorporated a mobile app into any of your incentive travel programs?

Yes
34%

No
66%