



# 2010 Study of the German Incentive & Motivational Travel Market

**Site**

International  
Foundation

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**Site** | Germany

## Foreword

The Federal Republic of Germany is one of the world's leading source markets and destinations for incentive and motivational travel. To celebrate Site Germany's 10th anniversary in 2000, a seminal '*Market Analysis of Incentive Travel in Germany*' was commissioned and published. Many of the findings were - needless to say – out of date by the occasion of Site Germany's 20th anniversary celebrations in 2010. To mark this important anniversary, Site Germany and the Site International Foundation decided to commission a new '*2010 Study of the German Incentive & Motivational Travel Market*', with kind partner support from the Berlin Convention Office, the Cologne Convention Bureau, the German Convention Bureau, the Munich Tourist Office, tmf GmbH and Tourism Marketing & Public Relations.

The purpose of this new study is threefold. Firstly, to provide point-in-time benchmarks specific to German incentive travel programs, both domestic and outbound; secondly, to identify trends in procurement and organization; and thirdly, to explore future perspectives of motivational & incentive travel in Germany.

Productivity is an essential factor in economic progress and in all business success. Well-trained and highly motivated people are what power productivity and it is people who motivate people. Human motivation is influenced by the recognition, interest and sympathy of other individuals. This motivation is generated by positive interpersonal relationships that are balanced with care, attention and sound leadership. Incentive/ motivational travel is a global management tool that can assist in this vital process because it is a catalyst that uses exceptional travel experiences to motivate and/or recognize participants for increased levels of performance.

Incentive/ motivational travel is a fascinating instrument that may be employed in helping to tackle many of today's economic, organizational and indeed social and ecological challenges. This study will hopefully serve as a basis for improved planning, for informed and lively discussion and as a platform for future research and MICE industry development.

Dr. Patrick Patridge

Research Project Chair

September 2010, Frankfurt/ Main

## Vorwort

Deutschland ist einer der weltweit wichtigsten Quell- und Zielmärkte für Incentive- und Motivationsreisen. Anlässlich des 10. Jubiläums des deutschen Site Chapters im Jahr 2000, wurde eine Studie mit dem Titel „Marktanalyse Incentive – Reisen in Deutschland: Umfang, Motive und Organisationsformen“ in Auftrag gegeben und veröffentlicht. Viele der Ergebnisse sind heute selbstverständlich überholt. Zur Feier des 20 - Jährigen Bestehens von Site Germany, haben Site Germany und die Site International Foundation entschieden, eine neue Studie mit dem Titel „2010 Study of the German Incentive- & Motivational Travel Market“ zu realisieren. Das Projekt wurde freundlicherweise durch das Berlin Convention Office, das Köln Convention Bureau, das German Convention Bureau, das Tourismusamt München, die tmf GmbH und durch Tourism Marketing & Public Relations unterstützt.

Die Studie hat drei Ziele. Erstens, soll ein Überblick über die Incentive Programme geschaffen werden, die von deutschen Agenturen und Unternehmen im In- und Ausland organisiert werden. Zweitens sollen Trends in Bezug auf die Auftragsvergabe und die Organisation der Incentive - Reisen und Motivationsprogramme identifiziert werden. Das dritte Ziel ist es, zukünftige Perspektiven der Motivations- und Incentive - Reisen in Deutschland zu untersuchen.

Produktivität ist ein essentieller Faktor in der wirtschaftlichen Entwicklung und die Grundlage allen geschäftlichen Erfolgs. Gut ausgebildete und hochmotivierte Mitarbeiter steigern die Produktivität und es sind immer Menschen, die andere Menschen motivieren. Menschliche Motivation wird beeinflusst von der Anerkennung, dem Interesse und der Sympathie von und für andere Menschen. Diese Art von Motivation wird durch positive, zwischenmenschliche Beziehungen erzeugt, verbunden mit einem umsichtigen und aufmerksamen Umgang und einem guten Führungsstil. Incentives und Motivationsreisen sind wichtige Managementinstrumente, die diesen wichtigen Prozess unterstützen und verstärken. Außergewöhnliche Reiseerlebnisse werden genutzt, um Teilnehmer zu motivieren und/oder gute Leistungen zu belohnen.

Incentive- und Motivationsreisen sind ein faszinierendes Instrument, das angewendet werden kann, um viele der aktuellen wirtschaftlichen, organisatorischen und sogar auch sozialen und ökologischen Herausforderungen zu bewältigen. Diese Studie wird hoffentlich als Grundlage für zielgerichtetes Planen, als Basis für lebhaftes Fachdiskussionen und als Ausgangspunkt für weitere Marktforschungen in der MICE Branche dienen.

Dr. Patrick Patridge

Wissenschaftlicher Projektleiter

September 2010, Frankfurt/ Main

## The Site International Foundation

### The Site International Foundation

The mission of the Site International Foundation is simple—to enhance the awareness and effectiveness of motivational experiences and incentive travel, thereby increasing usage globally. The Site International Foundation has served Site members since 2006 by providing research and educational programs that assist business executives, practitioners and partners who operate in our community.

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## Site Global & Site Germany

Founded in 1973, **Site - the Society of Incentive and Travel Executives** is the only international, not-for-profit, professional association devoted to the pursuit of excellence in incentives, a multi-billion dollar global industry. **Site Germany** was founded in May 1990 in Munich. Site Germany celebrated its 20th anniversary on 26th May 2010 in Frankfurt am Main.

Site provides educational seminars, networking programs and information services to those who design, develop, promote, sell, administer, and operate motivational programs as an incentive to increase productivity in business. Currently Site has over 2,300 members in 87 countries, with 35 local and regional chapters.

**Site members** represent corporate executives, incentive companies, destination management companies, travel & event planners, official tourist organizations, marketing & public relations consultants, transportation companies, hotels and resorts, cruise lines, trade publications, and supporting organizations such as restaurants and visitor attractions.

## Site Global & Site Germany

### Mission Statement

The Society of Incentive & Travel Executives (Site) is a worldwide organization of business professionals dedicated to the recognition and development of motivational and performance improvement strategies of which travel is a key component. It recognizes global cultural differences and practices in developing these strategies, and serves as a prime networking and educational opportunity for its members.

### Core Purpose

The Core Purpose of The Society of Incentive & Travel Executives is to foster networking and professional development among individuals and business entities involved in the use of motivation, incentives, and travel rewards.

### Definition of Incentive Travel

Incentive travel is a global management tool that uses an exceptional travel experience to motivate and/or recognize participants for increased levels of performance in support of organizational goals.

Site's strategic vision, promise and identity are built on three core brand pillars: **Global Connections, Motivational Experiences and Business Results**. These brand pillars are the focus of all Site communications and business planning. This fresh brand identity provides the framework for programs and services that are valuable and meaningful to all Site members.

Further information: [www.siteglobal.com](http://www.siteglobal.com) and [www.site-germany.de](http://www.site-germany.de)

## Executive Summary

### Objectives of the Study

This survey provides information about the current situation of the German motivational & incentive travel market. Its primary aims are:

- to provide point-in-time benchmarks specific to German incentive travel programs, both domestic and outbound
- to identify trends in procurement and organization and
- to explore future perspectives of motivational & incentive travel in Germany.

The following points are clarified:

- How many incentives are carried out per year?
- What is the relation of domestic and outbound events?
- How many days do the incentive travel programs last?
- How many people participate in incentive travel programs?
- Who are the main cooperation partners of agency and corporate planners?
- What are the current budgets for incentive travel programs?
- What are corporations' main purposes for organizing incentive travel
- What kind of procurement demands agencies and corporate planners have to deal with?
- How agencies and corporate planners place their contracts?
- Future perspectives of incentive travel in Germany?

## Executive Summary

### Composition of Sample

The target groups of this study were incentive travel operating agents / intermediaries and corporate planners, all based in Germany. Between 23/06/2010 and 20/07/2010, 127 of them filled out an online questionnaire and between 06/07/2010 and 16/07/2010, 50 contacts were interviewed by telephone. In both cases the pre-set target sample was achieved. In addition, the participants of the telephone interviews were selected by postcode and industry sector quotas in order to represent the whole of the German incentive and motivational travel market. In both samples, agencies consisted mainly of full-service incentive houses and event / advertising agencies and corporate planners belonged mostly to the “banking, finance, insurance”, “pharmaceutical, medical, chemical” and “electronics, IT” sectors.

### Main Findings

- On average, incentive trips last 3.2 days.
- German incentive travel planners organize 15 incentives per year on average (domestic and outbound).
- Incentive trips mostly range from 20 to 99 participants. A quarter of the incentive agencies / corporate planners carry out incentives with 250 and more participants (domestic and outbound).
- Nearly all incentive planners collaborate with hotels directly, whether a destination is well-known or not. DMCs, specialised domestic agencies (e. g. for teambuilding or outdoor programs) and convention bureaus are commissioned more often if destinations are less- or not well-known to the planner.
- The average budget for domestic incentive trips is € 435 per participant per day; the main range is from € 201 to € 600. For outbound incentives, the budget is € 605 on average; every fourth incentive travel planner can apply a budget of € 800 and more.
- Rewarding employees is presently viewed as the main objective of incentive / motivational travel. An increasingly important reason for organizing incentive travel is improving performance by motivating and educating participants.

## Executive Summary

### Main Findings

- Half of the incentive agencies questioned had to cooperate with their clients' procurement department, mostly concerning costs for flights and hotels
- Within corporations, about every third in-house planner has to consult management when making decisions concerning incentive / motivational travel.
- For sourcing out services, incentive organizers most frequently work with preferred partner agencies.
- Incentive trips are becoming increasingly shorter and are carried out in Europe more often than overseas and in Germany more often than abroad.
- Programs are becoming more intensive and dense and include more elements (e.g. meetings/ conferences, education, training and business plus leisure, fun, sports, and social issues).
- Variety, originality and the inclusion of lifestyle topics will gain in significance and importance in the future.

## Executive Summary

### Conclusions

- The study indicates that Germany remains on top of important markets for incentive / motivational travel - both for domestic and for international suppliers.
- One quarter of the planners in this survey organize “large” incentives with more than 250 participants. This represents great business potential.
- There are still incentive travel programs with substantial budgets (over € 800 per day per participant without flight costs) to destinations abroad – even after two years of economic crisis.
- Convention Bureaus and suppliers such as hotels and DMCs should continue to utilize the full potential of German incentive travel planners.
- A suitable and correct marketing mix will help them to access this valuable market or to deepen existing contacts.
- As many incentive travel intermediaries and corporate planners collaborate with preferred partners, customer care will play an ever more important role.
- The financial crisis has set off some changes endowing a - maybe enduring - new aspect to the planning and organization of incentive trips.
- The incentive / motivational travel industry needs to learn how to involve and educate the procurement executives, so they will better understand the “emotional” (non-monetary) part of incentive travel programs.

## Executive Summary

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The study is available for download at [www.siteglobal.com](http://www.siteglobal.com) and [www.site-germany.de](http://www.site-germany.de)

## Abstrakt

### Ziele der Studie

Diese Studie stellt Informationen über die aktuelle Situation des deutschen Incentive- und Motivationsreisemarktes bereit. Ihre primären Ziele sind:

- Benchmarks deutscher Incentive - Programme im In- und Ausland bereitzustellen
- Trends in der Auftragsvergabe und Organisation zu identifizieren und
- zukünftige Perspektiven der Motivations- und Incentive - Reisen in Deutschland zu untersuchen.

Die folgenden Punkte werden näher erläutert:

- Wie viele Incentives werden pro Jahr durchgeführt?
- Wie ist das Verhältnis von Events im In- und Ausland?
- Wie viele Tage dauern Incentive - Reisen?
- Wie viele Personen nehmen an den Incentive - Reisen teil?
- Mit wem arbeiten die Agenturen und Corporate Planer zusammen?
- Wie hoch sind die Budgets für Incentive - Reisen?
- Aus welchen Gründen organisieren die Unternehmen Incentive - Reisen?
- Inwiefern müssen Agenturen mit den Einkaufsabteilungen Ihrer Kunden zusammenarbeiten?
- Wie vergeben Agenturen und Corporate Planer ihre Aufträge?
- Zukünftige Aussichten für Incentive - Reisen in Deutschland?

## Abstrakt

### Zusammensetzung des Samples

Die Zielgruppen der Studie waren Vermittler von Incentive - Reisen und Corporate Planer in Deutschland. Zwischen dem 23.06.2010 und dem 20.07.2010 haben 127 von ihnen einen Online-Fragebogen ausgefüllt, und zwischen dem 06.07.2010 und dem 16.07.2010 wurden 50 Kontakte telefonisch interviewt. In beiden Fällen wurde das vorgegebene Ziel erreicht. Bei den Teilnehmern der Telefoninterviews wurden bestimmte Quoten hinsichtlich Postleitzahlgebiet und Industriezweig angewendet, um den ganzen deutschen Markt für Incentive- und Motivationsreisen abzudecken. In beiden Samples waren die Agenturen zumeist Full-Service Incentive-Agenturen und Event- / Werbeagenturen, die Corporate Planer kamen hauptsächlich aus den Sektoren „Banken, Finanzen, Versicherungen“, „Pharmaindustrie, Medizin, Chemie“ und „Elektronik, IT“.

### Die wichtigsten Ergebnisse

- Incentive - Reisen dauern durchschnittlich 3,2 Tage.
- Deutsche Planer von Incentive-Reisen organisieren durchschnittlich 15 Incentives pro Jahr (im In- und Ausland) Incentive - Reisen haben meistens zwischen 20 und 99 Teilnehmer. Ein Viertel der Incentive-Agenturen / Corporate Planer führen Incentive - Reisen mit 250 und mehr Teilnehmern durch (im In- und Ausland).
- Fast alle Planer von Incentive - Reisen arbeiten direkt mit Hotels zusammen, egal ob ihnen eine Destination bekannt oder unbekannt ist. DMCs, spezialisierte Agenturen und Convention Bureaus werden häufiger mit einbezogen, wenn eine Destination dem Planer weniger oder gar nicht bekannt ist.
- Das durchschnittliche Budget für Incentive-Reisen im Inland beträgt 435 € pro Teilnehmer und Tag; die Hauptspanne reicht von 201 € bis 600 €. Für Incentive-Reisen im Ausland beträgt das Budget durchschnittlich 605 €; jeder vierte Planer von Incentive-Reisen hat ein Budget von 800 € und mehr zur Verfügung.
- Das Belohnen von Mitarbeitern wird gegenwärtig als Hauptziel von Incentive- und Motivationsreisen angesehen. Immer wichtiger wird die Leistungssteigerung von Mitarbeitern durch Belohnung und Weiterbildung als Grund für Incentive-Reisen.

## Abstrakt

### Die wichtigsten Ergebnisse

- Die Hälfte der befragten Incentive-Agenturen muss mit der Einkaufsabteilung ihres Kunden zusammenarbeiten, hauptsächlich wenn es um die Kosten für Flüge und Hotels geht.
- Innerhalb der Unternehmen, muss etwa jeder dritte Corporate Planer Rücksprache mit dem Management halten, wenn es um Entscheidungen bezüglich Incentive- und Motivationsreisen geht.
- Wenn es um das Auslagern von Dienstleistungen geht, arbeiten Organisatoren von Incentive-Reisen meist mit bevorzugten Partneragenturen zusammen.
- Incentive-Reisen werden immer kürzer und finden immer öfter in Europa statt als in Übersee und häufiger in Deutschland als im Ausland.
- Programme werden immer intensiver und dichter und beinhalten immer mehr Elemente (z.B. Meetings / Konferenzen, Weiterbildung, Trainings und geschäftliche Themen in Verbindung mit Freizeit, Spaß, Sport und sozialen Themen).
- Vielfalt, Originalität und die Einbeziehung von Lifestyle-Themen (Bildung, Ernährung, Sport) werden in Zukunft mehr Bedeutung erhalten.

## Abstrakt

### Schlussbemerkung

- Die Studie zeigt, dass Deutschland an der Spitze der wichtigsten Märkte für Incentive- und Motivationsreisen bleibt – sowohl für heimische als auch für internationale Anbieter.
- Ein Viertel der Planer, die an dieser Studie teilgenommen haben organisieren „große“ Incentive-Reisen mit mehr als 250 Teilnehmern. Das stellt ein großes Businesspotential dar.
- Es gibt noch immer Incentive-Programme mit beträchtlichen Budgets (über 800 € pro Teilnehmer und Tag, ohne Anreisekosten) zu Auslandszielen – selbst nach 2 Jahren Wirtschaftskrise.
- Kongressbüros und Anbieter wie Hotels und DMCs sollten weiterhin das volle Potential der deutschen Incentive-Planer nutzen
- Ein geeigneter und richtiger Marketing-Mix hilft, Zugang zu diesem wichtigen Markt zu bekommen oder bestehende Kontakte zu vertiefen.
- Da viele Vermittler von Incentive-Reisen und Corporate Planer mit bevorzugten Partnern arbeiten, wird Kundenpflege eine immer wichtigere Rolle spielen.
- Die Wirtschaftskrise hat einige Veränderungen ausgelöst, und damit neue – vielleicht dauerhafte – Aspekte in die Planung und Organisation von Incentive-Reisen eingebracht.
- Die Branche muss einen Weg finden, um die Einkaufsabteilungen früher zu involvieren und Verständnis für den „emotionalen“ (nicht-monetären) Teil von Incentive-Programmen zu schaffen.

## Abstrakt

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## 1 Introduction: Objectives & Partners

The **SITE International Foundation** commissioned **tmf GmbH** (Munich and Würzburg) to carry out a new study of motivational & incentive travel in the German market in 2010.

### The purpose of this study is threefold:

1. to provide point-in-time benchmarks specific to German incentive travel programs, both domestic and outbound
2. to identify trends in procurement and organization; and
3. to explore future perspectives of motivational & incentive travel in Germany.

We would like to thank the tmf GmbH team for diligently carrying out this study, Johanna Fischer, Sonja Lotze and Meike Hass in particular.

We would also like to thank all persons in varying agencies and companies who offered up their time and knowledge in order to answer the questionnaires.

### Our Thanks

This study was made possible by partner donations from the Berlin Convention Office ([www.berlin-convention-office.com](http://www.berlin-convention-office.com)), the Cologne Convention Bureau ([www.conventioncologne.de](http://www.conventioncologne.de)), the German Convention Bureau ([www.gcb.de](http://www.gcb.de)), the Munich Tourist Office ([www.muenchen.de/Incentives](http://www.muenchen.de/Incentives)), tmf GmbH ([www.tmf-gmbh.de](http://www.tmf-gmbh.de)) and Tourism Marketing & Public Relations ([www.dr-patrick-patridge.de](http://www.dr-patrick-patridge.de)).



## 1 Introduction: Research Partner

### Research partner

tmf GmbH was chosen as research partner after an initial selection process. tmf GmbH is a Germany-based specialist for dialogue marketing with a strong focus on market research and all forms of strategic communication (marketing, sales and PR activities) in the European and selected overseas MICE (meetings, incentives, conferences and events) markets.

tmf GmbH's background and success is based on many years of expertise in the MICE industry, a strong branding in the buyers community and a focus on excellent and extensive buyer databases.

Concept and structure of the study were fully discussed and agreed with tmf GmbH.



### Reliable data

tmf GmbH designed and executed questionnaire and telephone interview surveys employing selected profiled and qualified data derived from two target groups: German incentive travel operating agents / intermediaries (event agencies, full-service incentive houses, tour operators with MICE departments) and corporate planners from selected industries.

### mmm – MICE market monitor

Since 2004, tmf GmbH carries out the annual 'mmm – MICE market monitor'. This is a well-established study providing representative data and professional insights into the most important developments of the German-speaking outbound MICE market.

For more information about tmf GmbH and the mmm10 please visit:

[www.tmf-gmbh.de](http://www.tmf-gmbh.de).



## 2 Methodology

### Selected buyers with international business

The following target groups were selected for this research:

- incentive travel operating agencies / intermediaries based in Germany
- corporate planners based in Germany.

All participants were chosen from the tmf master database. These contacts are pre-qualified for carrying out domestic and international incentive travel business on a regular basis. This ensures an optimum of benefit in the quality of answers received.

### Multiple data evaluation

The survey was split into two parts:

- Online survey on the market for incentive travel in Germany (10,500 contact persons in 1,500 incentive agencies / intermediaries and 4,500 companies were mailed).
- Guided telephone interviews with a selection of contacts about procurement / organization of incentive travel and future industry perspectives.

### Online survey

Between 23/06/2010 and 20/07/2010, 127 incentive travel agencies and corporate planners (according to target) took part in the survey, answering pre-set questions via internet.

The questionnaire was posted by e-mail and on tmf's website [www.tmf-forum.de](http://www.tmf-forum.de). It consisted of 10 questions. The data collected does not claim to be representative, but it allows a very good insight into the structure and development of incentive travel in Germany. The sample consists of more incentive travel agencies than corporate planners (a ratio 3:1). This ensures that way we obtain a broadest possible picture, as intermediaries usually have more possibilities for comparison and a broader view on trends and tendencies in the organization of incentive travel than most corporate planners do.

### Telephone interviews

The second module consisted of 50 guided telephone interviews (according to target), conducted between 06/07/2010 and 16/07/2010. Selected incentive travel agencies and corporate planners from the German incentive travel market were interviewed by tmf GmbH's research department. Data was entered into forms that allow for precise evaluation. The questionnaire comprised 8 questions, including one open question. The relation between agencies and corporate planners in this module was 3:2.

## 2 Methodology

### Data analysis

The online survey data and the data from the telephone interviews were transferred to a data set (SPSS). After data cleansing, the results were analyzed in several ways:

*First*, the frequency of standardized questions was calculated, differentiated by answers from incentive travel agencies and corporate planners.

*Second*, the means (averages) of those items which had to be ranked by interviewees themselves were calculated, and then listed according to frequency.

*Third*, statements from open questions were subsumed into several categories, which were then ranked by frequency.

### Presentation of results

All frequency distributions and mean comparisons are presented in clear graphics with succinct commentaries. Results of several questions are differentiated to gain useful in-depth information about different target groups (incentive travel agencies and corporate planners).

In general, the outcomes are ranked by frequency. Please note that, because of rounding errors, in some cases, the percentages don't add up to exactly 100.. After each question, the source of the answer (online survey, telephone interview) is indicated in brackets.

### Interpretation of results

It must be taken into account that the percentages presented should be seen as a help in orientation, rather than as an exact evaluation or interpretation of a given situation.

The research sample may not be fully representative in terms of numbers but it clearly highlights patterns, directions and tendencies in the German motivational & incentive travel market at a particular point in time – June 2010. It also opens up avenues for more comprehensive exploration and new research projects at a future date.

The high standard of the pre-selection of the telephone survey interviewees (high-profile planners of incentive travel only) allows for good conclusions.

### 3 Composition of sample

#### Participation

	Online Survey		Telephone interviews	
	Partici- pants	Share	Partici- pants	Share
MICE agencies	96	76%	30	60%
corporate planners	31	24%	20	40%
<b>total</b>	<b>127</b>	<b>100%</b>	<b>50</b>	<b>100%</b>

127 incentive travel agencies and corporate planners participated in the **online survey**. With 76% (n=96), agencies hold the higher share among the interviewees. The share of corporate planners is 24% (n=31). Therefore the required target (60 incentive travel agencies, 30 corporate planners) was achieved.

The sample of the **telephone interviews** consists of 50 participants (30 incentive travel agencies, 20 corporate planners).

In order to receive results which depict the actual structure of the German incentive and motivational travel market, participants of the telephone interviews were selected by postcode and industry sector quotas (see next page).

As shown on **pages 24 and 25**, in both samples (online survey and telephone interviews) the group of agencies interviewed consists mainly of full-service incentive houses and event / advertising agencies. Among the participating corporate planners, most came from the “banking, finance, insurance”-sector, followed by the “pharmaceutical, medical, chemical”- and “electronics, IT”-sectors (**see page 25**).

### 3 Composition of sample

#### Telephone interviews - postcode quota

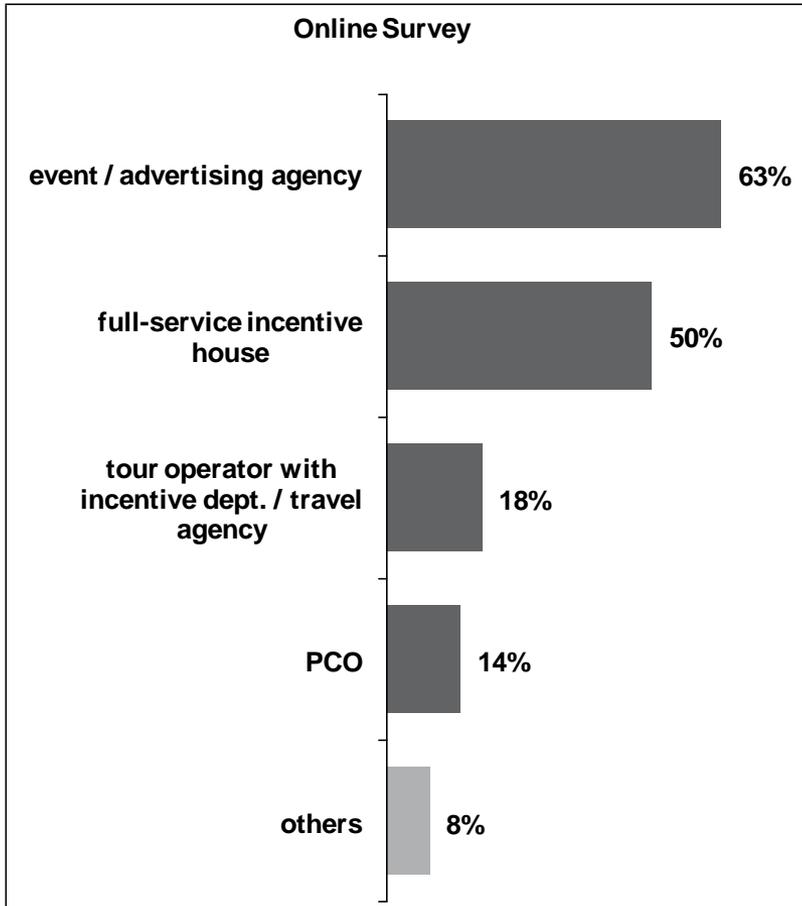
post-code	Incentive travel agencies		Corporate planners	
	target	conducted	target	conducted
0...	1	1	0	0
1...	3	3	1	1
2...	3	3	1	1
3...	1	1	1	2
4...	4	4	2	2
5...	3	3	2	3
6...	5	5	3	4
7...	3	3	1	1
8...	6	6	8	5
9...	1	1	1	1
<b>total</b>	<b>30</b>	<b>30</b>	<b>20</b>	<b>20</b>

#### Telephone interviews - industry quota

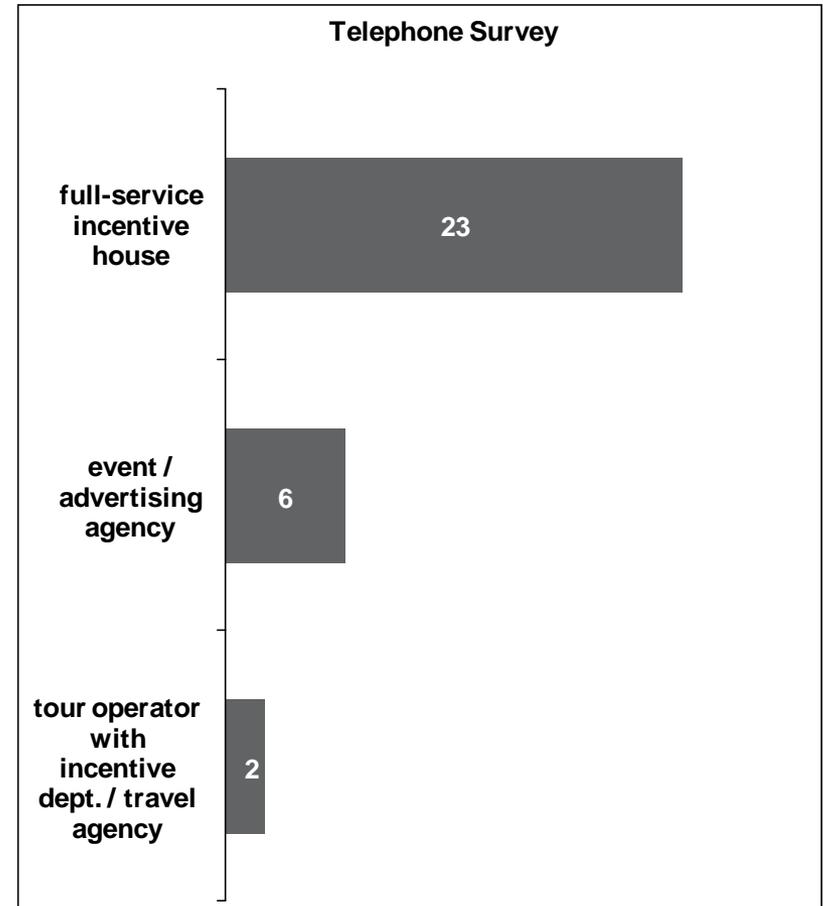
Industry	Target	Conducted
banking, finance, insurance	5	5
pharmaceutical, medical, chemical	4	3
electronics, IT	2	2
industrial goods	2	2
communication, media	1	1
automotive sector	2	2
food, beverages, tobacco	1	1
services	1	1
cosmetics	1	1
construction, trade	1	0
other sectors	0	2
<b>total</b>	<b>20</b>	<b>20</b>

### 3 Composition of sample

#### Categories of interviewed Incentive Travel Agencies



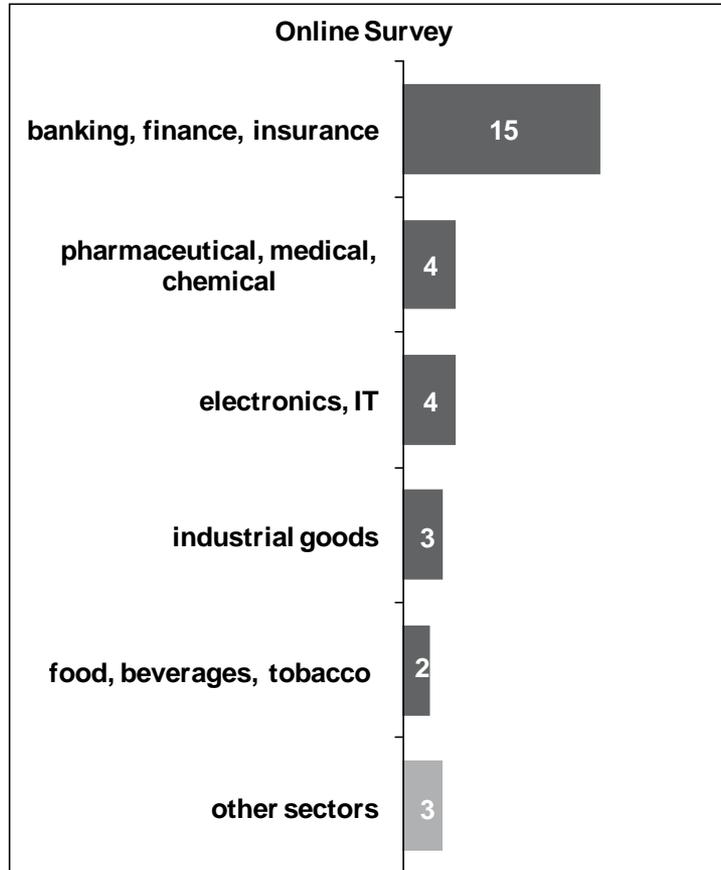
(n=96; multiple answers possible; ranked by frequency; "others": 2x business travel expert, DMC, venue research, live communication agency, PR agency, provider of education programs, agency for off road trips)



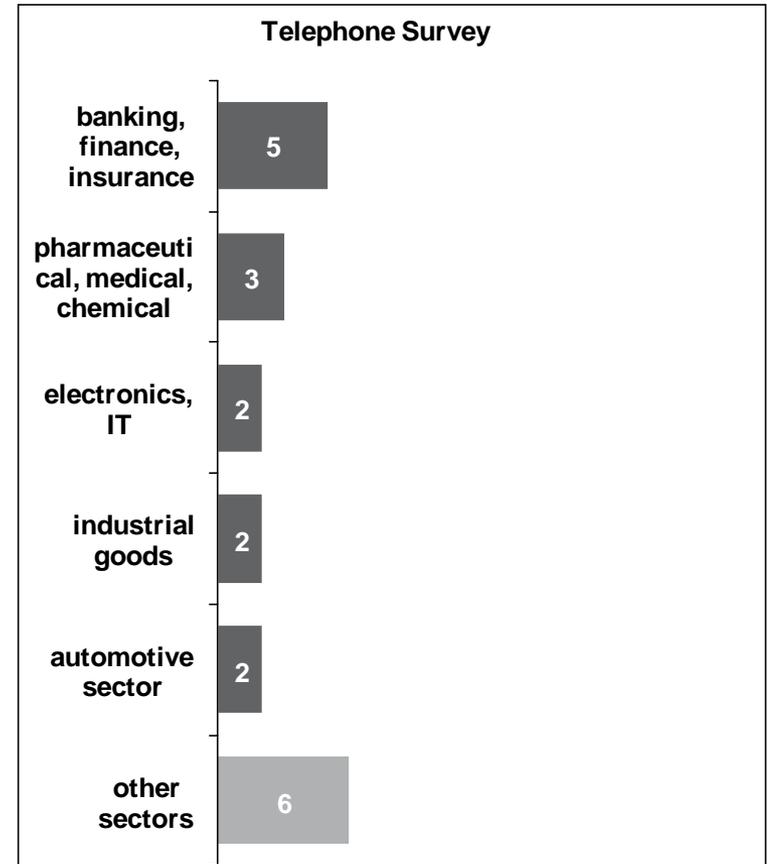
(n=30; multiple answers possible; results in absolute numbers; ranked by frequency)

### 3 Composition of sample

#### Industry sectors of interviewed Corporate Planners



(n=31; multiple answers possible; results in absolute numbers; ranked by frequency; "other sectors": automotive sector, communication/ media, trade, engineering)



(n=20; multiple answers possible; results in absolute numbers; ranked by frequency; "other sectors": communication, cosmetic industry, consulting, trade, consumer goods, food)

## 4 Benchmarks for incentive / motivational travel in Germany

There is a great demand in our industry for reliable data about the German incentive and motivational travel market. However, planners in the German market are either reluctant to share certain information (e.g. budgets) or they lack time to answer questionnaires or to participate in interviews. It has become increasingly difficult to collect information due to the challenges of the current economic situation and – conditioned by this – due to tighter staff scenarios and increased restrictions on the way planners (in particular corporate planners) may share and use information.

### **Size of the German market for incentive travel**

The German MICE market presently consists of approx. 1,500 intermediary companies and 4,500 corporations organizing incentive travel and meetings programs (Source: tmf GmbH). The current economic climate has had an effect on these figures. The good news, however, is that after a decrease in business over the past two years, the tendency is switching once again towards an increase in incentive travel, particularly to outbound destinations.

The German market consists on the one hand of a high number of smaller intermediaries/ agencies with a wide scope of corporate customers and client specifications. On the other hand, it features a rather small core group of larger agencies that are more visible to the outside world and who are often widely approached by companies seeking German MICE market business. For suppliers seeking German incentive travel business, it is necessary to work at both ends of the market in order to really benefit from the excellent potential this market has to offer – for domestic, inbound and for outbound business.

## 4.1 Structure of the German incentive travel market

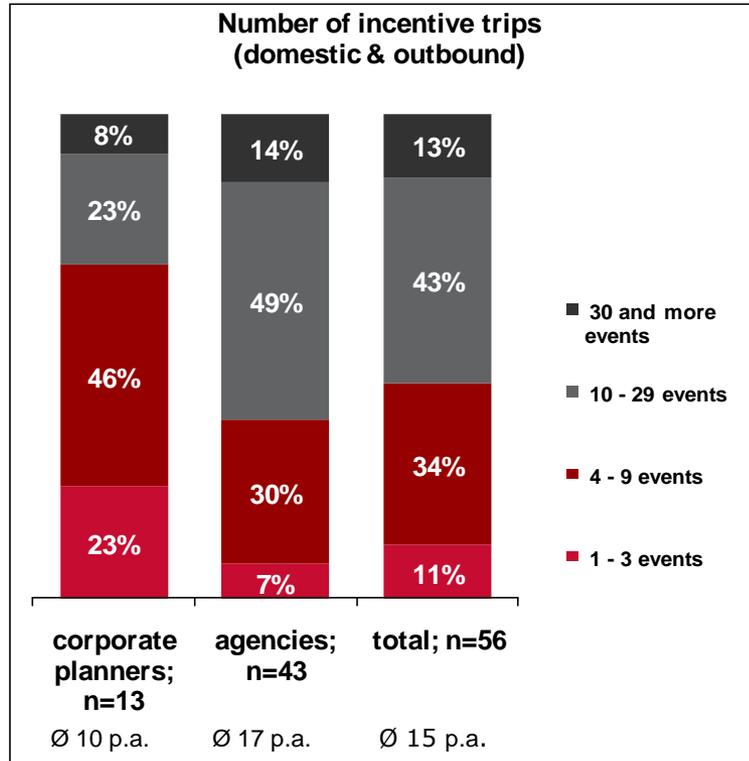
The market for incentive travel in Germany is not homogenous. There are many different set-ups and approaches to applying and organizing incentive travel. In this study we will examine the following benchmark areas:

- annual number of incentives
- share of incentives: domestic / outbound
- duration of incentive trips
- number of participants
- co-operation with suppliers / service providers
- incentive travel budgets per participant per day: domestic / outbound

tmf GmbH co-operates with renowned research specialists who guarantee that all our studies are carried out in accordance with standard statistical rules. We wish to thank and acknowledge the support given by Dr. Patrick Patridge, who has provided valuable ideas and inspiration to this study.

## 4.1.1 Annual number of incentives

Question: On average, how many incentive trips does your company organize annually? (ONLINE SURVEY)



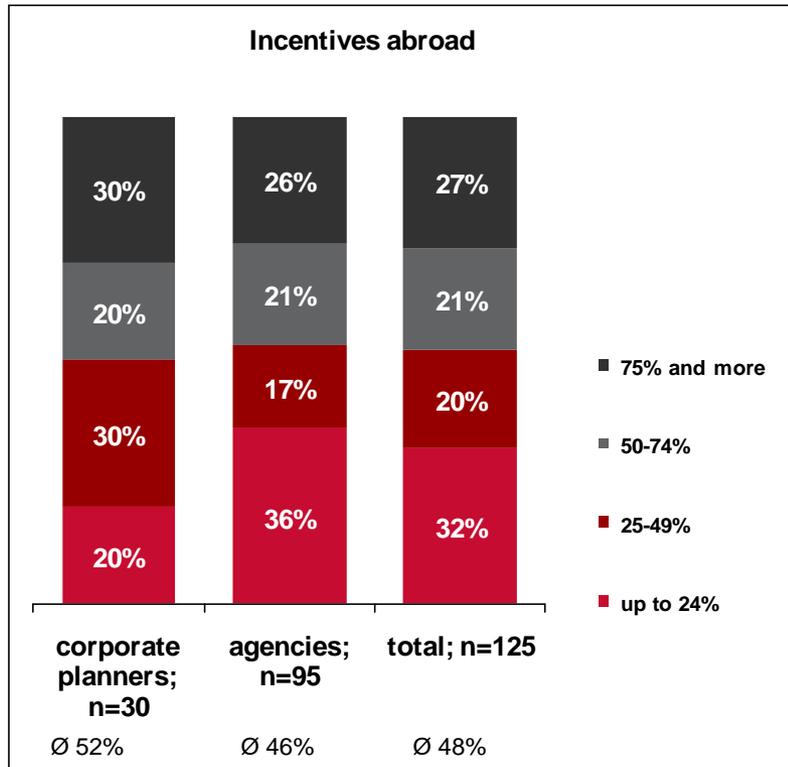
On average, German incentive planners organize about 15 incentive trips per annum (domestic and outbound). Nearly half of the interviewees carry out up to 9 and about every tenth organizes 30 and more incentive trips.

When taking a closer look into answers from the corporate sector, we see that companies from banking, finance and insurance and from IT are the biggest producers of incentive travel. These organize between 10 to 30 incentive trips on average per annum.

The chart provides a clear indication that 45 % of intermediaries and corporate planners organize between 1-9 events per annum. This figure, however, does not provide any information about the size of those incentive trips. It is important to bear in mind that there are many small agencies with a small total number of incentive trips but that the trip size can indeed be rather significant (e.g. when an agency works for a large project in one corporation only).

## 4.1.2 Share of events outbound

Question: What percentage of your incentive trips take place abroad? (ONLINE SURVEY)



At present, 52% of German incentive travel trips are domestic while 48% are organized and held abroad. As indicated in the **introduction on page 8**, the share of outbound movements is smaller than in previous years (according to tmf GmbH's own research).

This is due to economic shifts over the past two years. Trends indicate that these shares will shift once again because of a swift recovery in the German economy in 2010.

The share of corporate planners organizing incentive trips **abroad** is slightly higher than the percentage of agencies doing so. Due to the wider range of business in agencies, their share is considered more relevant. 48 % of incentive trips to non-German destinations is a sound number.

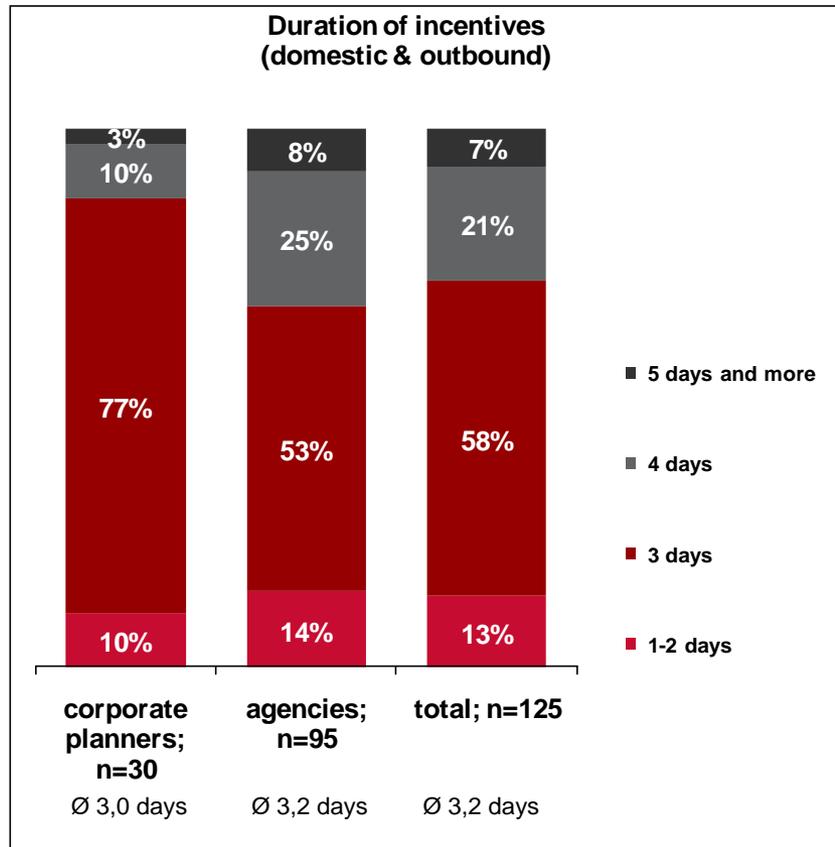
When it comes to corporate planners, the banking, finance and insurance sector is represented in all of the given ranges, so no clear tendency in the outbound share in this particular segment is evident. However, three out of four planners from the electronics and IT sector carry out more than 50% of their incentive trips abroad.

Planners from the pharmaceutical, medical and chemical sector arrange a greater number of domestic incentive trips than their colleagues from other sectors. None of the pharmaceutical planners exceeds the 50%-rate of incentive trips organized abroad. This is a logical outcome of the application of the pharmaceutical codex in recent years.

### 4.1.3 Duration of incentive trips

Question: What is the average duration of your incentive trips?

(ONLINE SURVEY)



Incentive trips last 3.2 days on average. A quarter of the interviewees organize incentives with a duration of 4 days and more – incentive trips in that range include those to long-haul destinations.

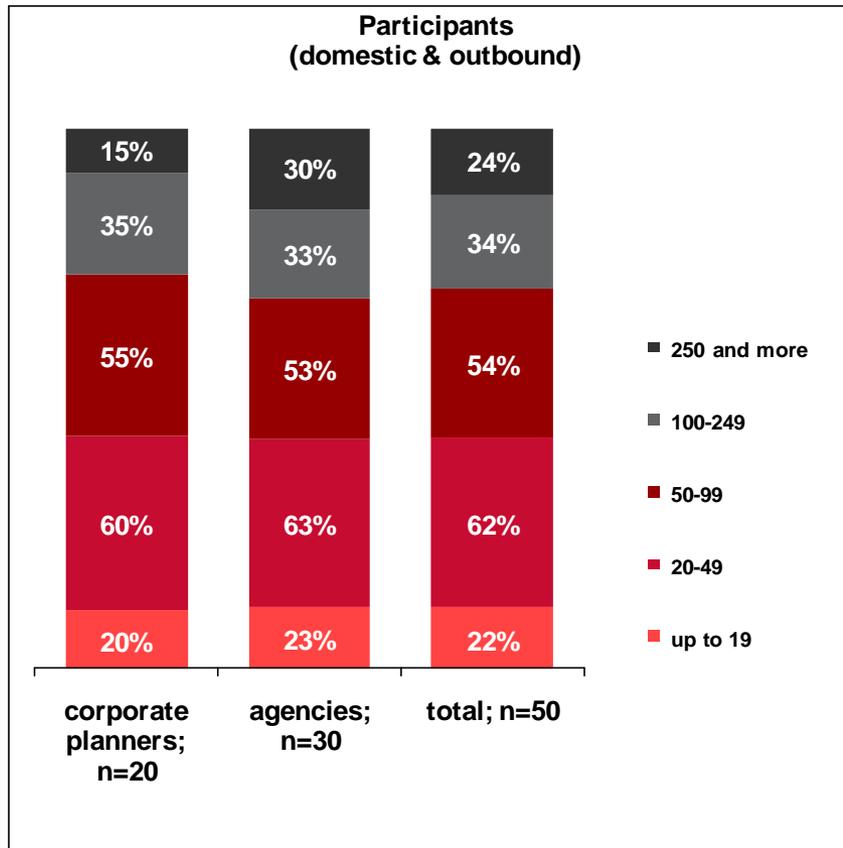
This trend corresponds with results of the Site-study conducted by Prof. Kirstges in the year 2000. His final report underlined as well that the average duration of German incentive trips was three days, including weekends.

Companies do not want their staff to spend too much time out of the office even though trips are primarily meant as a reward. Participants also have individual obligations and do not want to spend too much time travelling.

The use of 3-day incentives is even stronger on the part of corporate planners. 77% state that their incentive trips last three days on average. No planner from the pharmaceutical segment has incentives with a duration longer than 3 days (pharma codex) Most planners from the banking, finance and insurance sector organize incentive trips of 3-days duration and shorter.

## 4.1.4 Participant numbers

Question: What is the average number of participants on your incentive trips? (TELEPHONE INTERVIEWS)



Due to the fact that incentive planners organize various types and formats of incentives, multiple answers were possible. Most incentive trips have an average attendance of 20 to 99 participants. About every fourth interviewee organizes incentives with 250 and more participants.

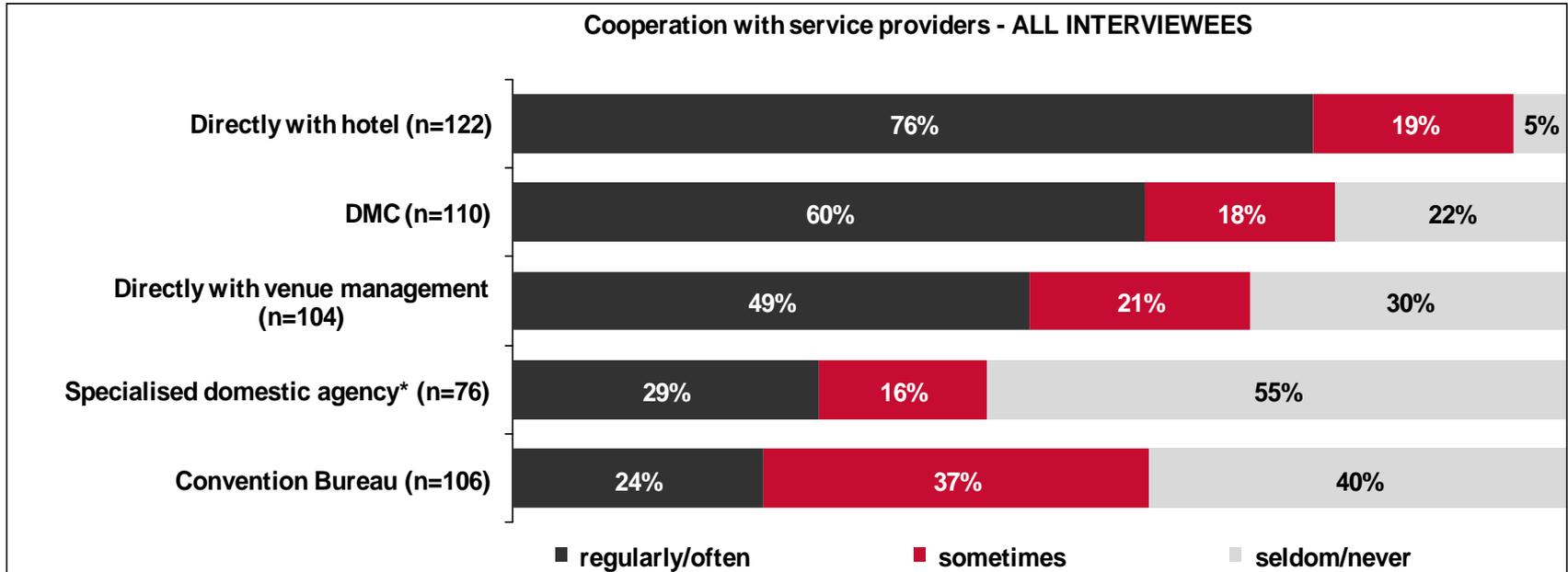
The differentiation between agencies and corporate planners does not uncover great differences between the two groups, nor do corporate industry segments show clear tendencies for a particular size of incentive trips. Only the banking, finance and insurance sector has a slight accumulation of incentive trips with participant numbers between 50 and 99.

The German market has always been a strong producer of smaller size incentives (up to 100 participants) but there is also a significant amount of larger groups. Corporate planners who stated that they organize events with more than 250 participants came mainly from the banking, finance and insurance, pharmaceutical, medical, chemical and automotive sectors.

## 4.1.5 Cooperation with service providers

Question: How often do you cooperate with the following partners when organizing incentives? (ONLINE SURVEY)

### IF A DESTINATION IS WELL-KNOWN



\*for example agencies specialised in teambuilding or outdoor programs

(ranked by frequency of “regularly/often”; others: personal contacts, colleagues, restaurants, airline, subsidiary, tourist office, transfer service)

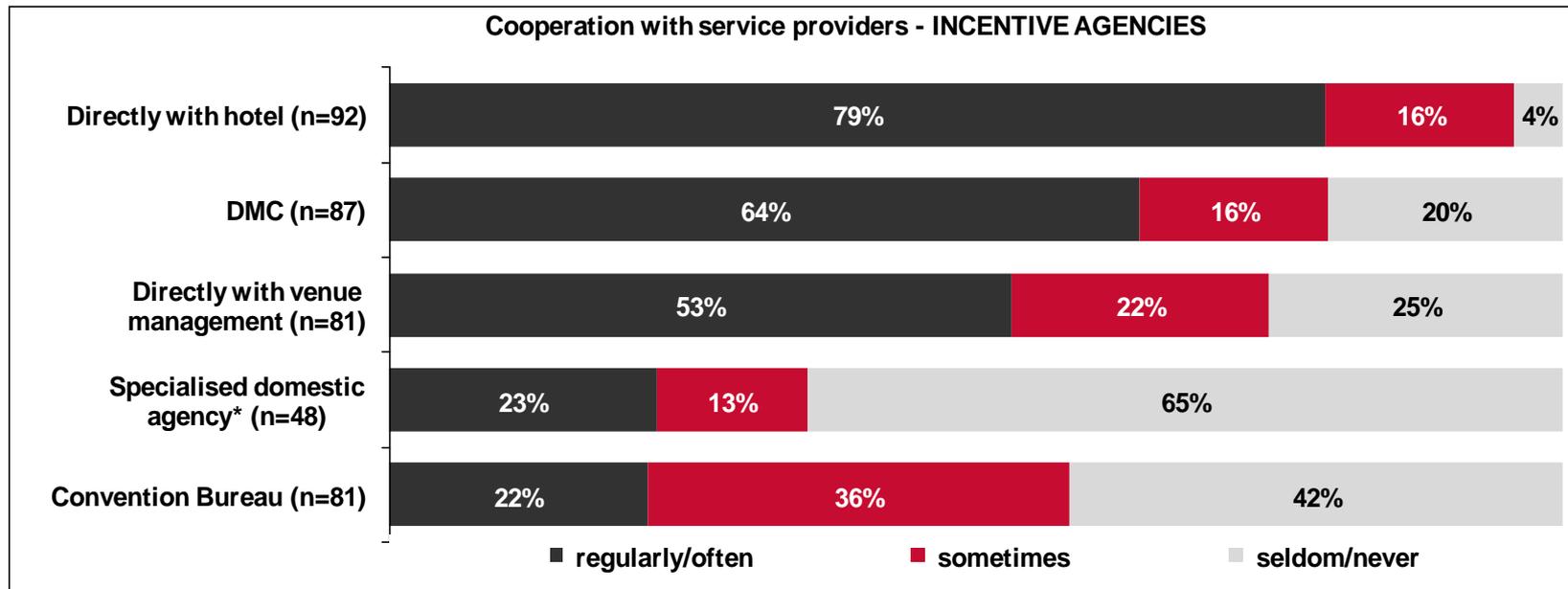
If a destination is well-known nearly all incentive travel organizers contact hotels directly (95% “regularly”, “often” and “sometimes”). Most of them are in contact with **DMCs** and venue managements, as well.

Approximately half of the interviewees use the services of **convention bureaus** - every fifth does so regularly or often.

## 4.1.5 Cooperation with service providers

Question: How often do you cooperate with the following partners when organizing incentives? (ONLINE SURVEY)

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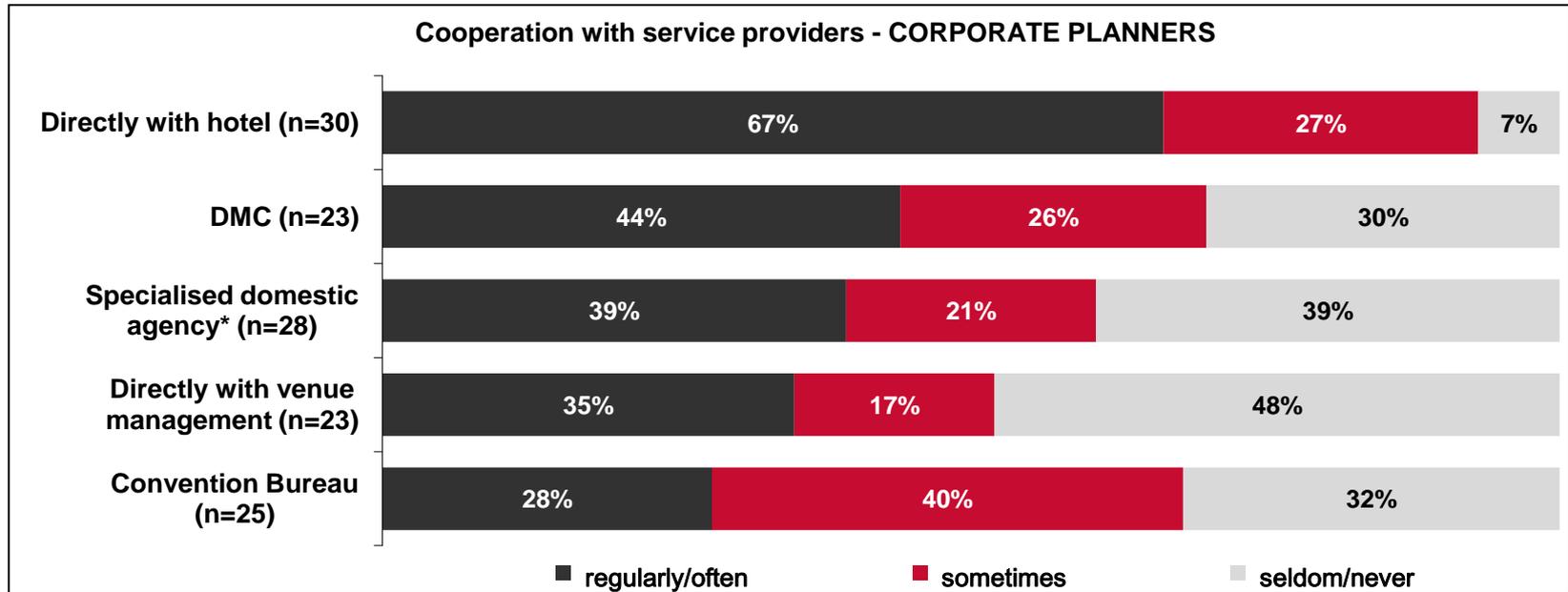
Incentive agencies prefer to work with hotels directly. In addition, they frequently cooperate with DMCs.

Some incentive agencies commission **specialized domestic agencies** – e.g. agencies that organize motivation, teambuilding or outdoor programs, elements that require special expertise and equipment.

## 4.1.5 Cooperation with service providers

Question: How often do you cooperate with the following partners when organizing incentives? (ONLINE SURVEY)

**IF A DESTINATION IS WELL-KNOWN**



\*for example agencies specialised in teambuilding or outdoor programs

(ranked by frequency of “regularly/often”; others: personal contacts, colleagues, restaurants, airline, subsidiary, tourist office, transfer service)

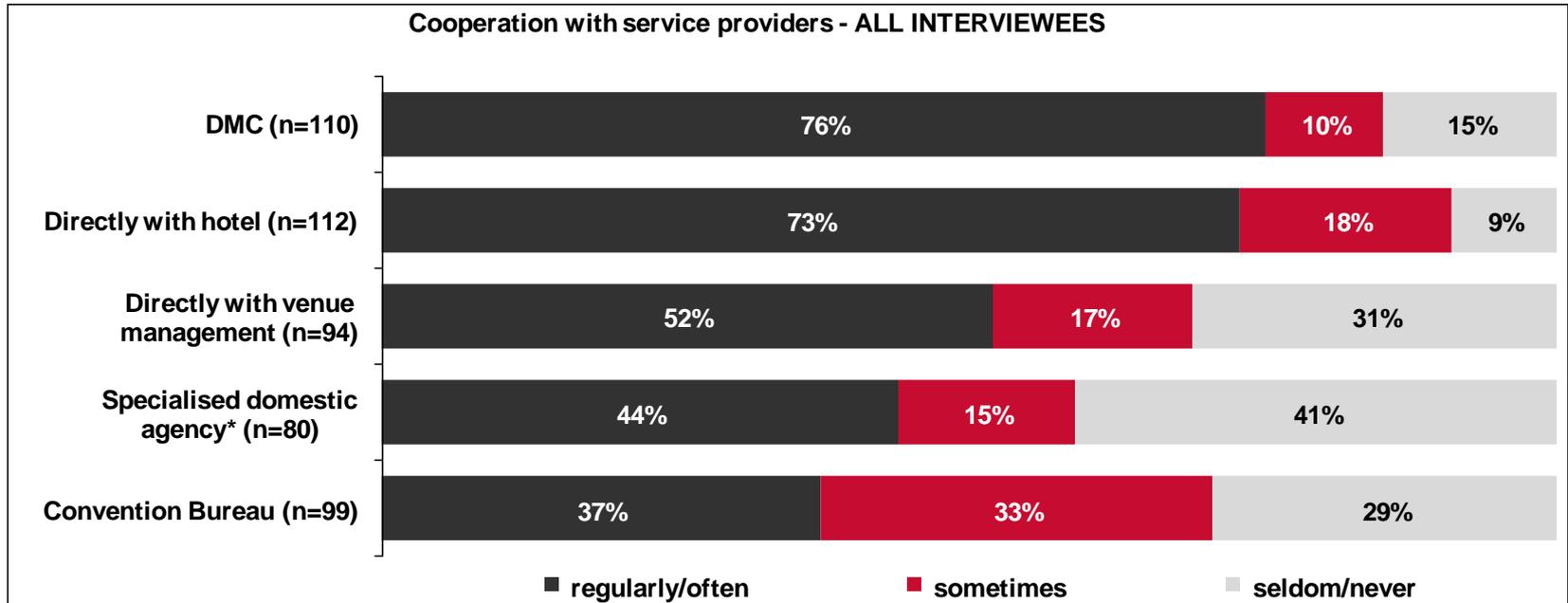
Nearly all corporate planners organizing incentives in well-known destinations, cooperate with hotels directly sometimes or regularly. They collaborate with venue managements less frequently than incentive agencies.

Corporate planners use services from specialized domestic agencies quite regularly because these either provide services such as teambuilding and outdoor programs that require special knowledge and equipment or are incentive houses providing full service to corporate planners.

## 4.1.5 Cooperation with service providers

Question: How often do you cooperate with the following partners when organizing incentives? (ONLINE SURVEY)

**IF DESTINATION IS LESS OR NOT KNOWN**



\*for example agencies specialised in teambuilding or outdoor programs

(ranked by frequency of "regularly/often"; others: 2x personal contacts, partner offices, recommendations, restaurants, airline, subsidiary, tourist office)

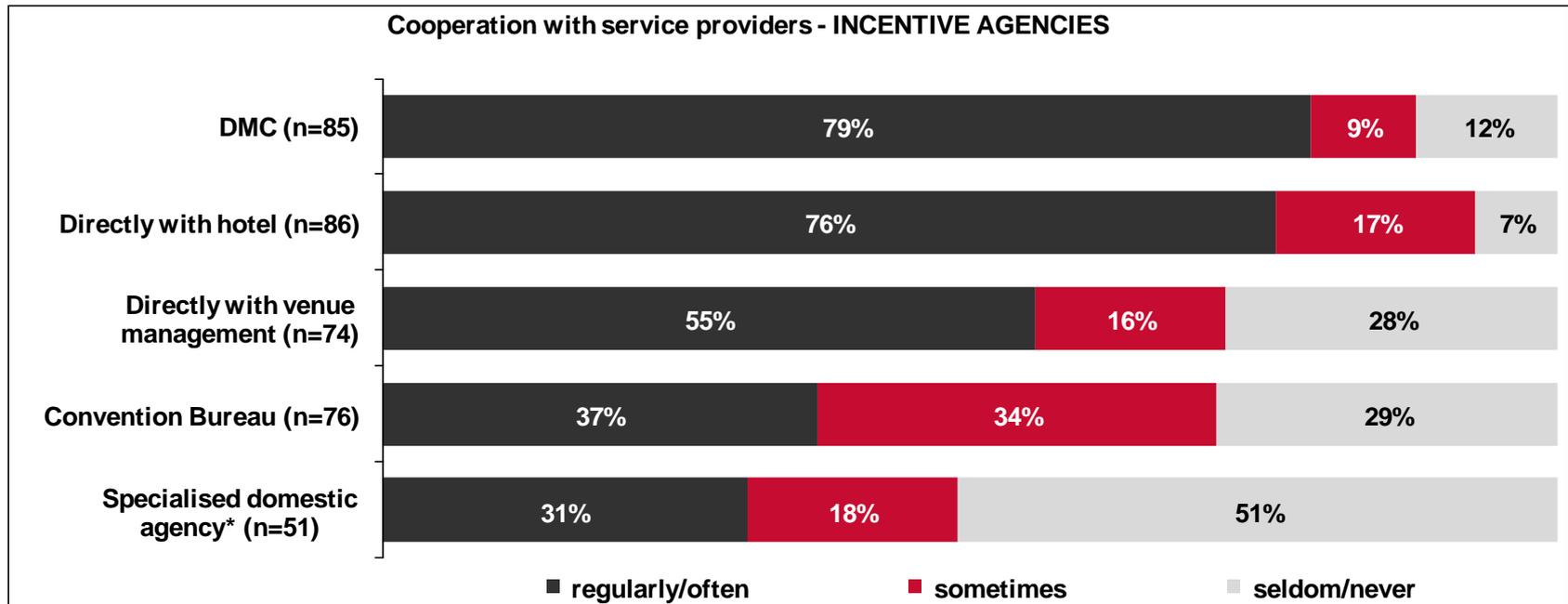
In comparison to well-known destinations, in new or unknown destinations, DMC services are used more often.

In addition, specialized domestic agencies and convention bureaus appear to play a more important role if a destination is less or not known. This could be due to planners' lack of local knowledge.

## 4.1.5 Cooperation with service providers

Question: How often do you cooperate with the following partners when organizing incentives? (ONLINE SURVEY)

**IF DESTINATION IS LESS OR NOT KNOWN**



\*for example agencies specialised in teambuilding or outdoor programs

(ranked by frequency of "regularly/often"; others: personal contacts, partner offices, recommendations, restaurants, airline)

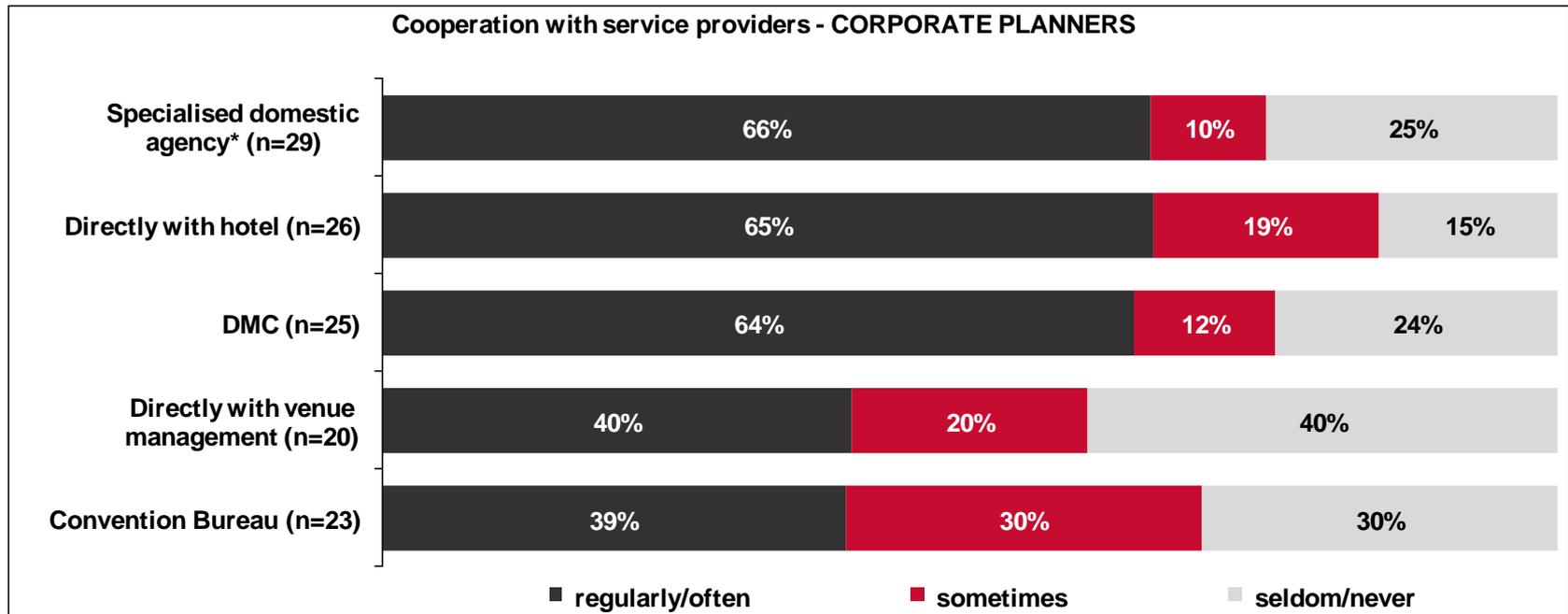
Incentive agencies, in particular, use DMC services if a destination is less or not known. Three quarters of the interviewees cooperate with DMCs regularly or often.

Compared to the situation where a destination is well-known, many incentive agencies (nearly half of them) work with specialized domestic agencies in destinations that are new to them.

## 4.1.5 Cooperation with service providers

Question: How often do you cooperate with the following partners when organizing incentives? (ONLINE SURVEY)

**IF DESTINATION IS LESS OR NOT KNOWN**



\*for example agencies specialised in teambuilding or outdoor programs

(ranked by frequency of "regularly/often"; others: 2x personal contacts, partner offices, recommendations, restaurants, airline, subsidiary, tourist office)

The most important partners for corporate planners are hotels, specialized domestic agencies and DMCs if a destination is not well-known.

Regarding other service providers, there are no real differences between when a destination is well-known or not.

## 4.1.5 Cooperation with service providers

A general tendency over the past number of years in mature markets generating incentive travel is for planners to operate as directly as possible when they are familiar with a destination. This is clearly indicated in the results, e.g. in direct co-operation with hotels. DMCs and other specialist agencies are still widely used even when a destination is quite well-known. This might sound like a paradox, however, specialized agency/DMC services are in stable demand because of increasing time and staff resource pressures over recent years.

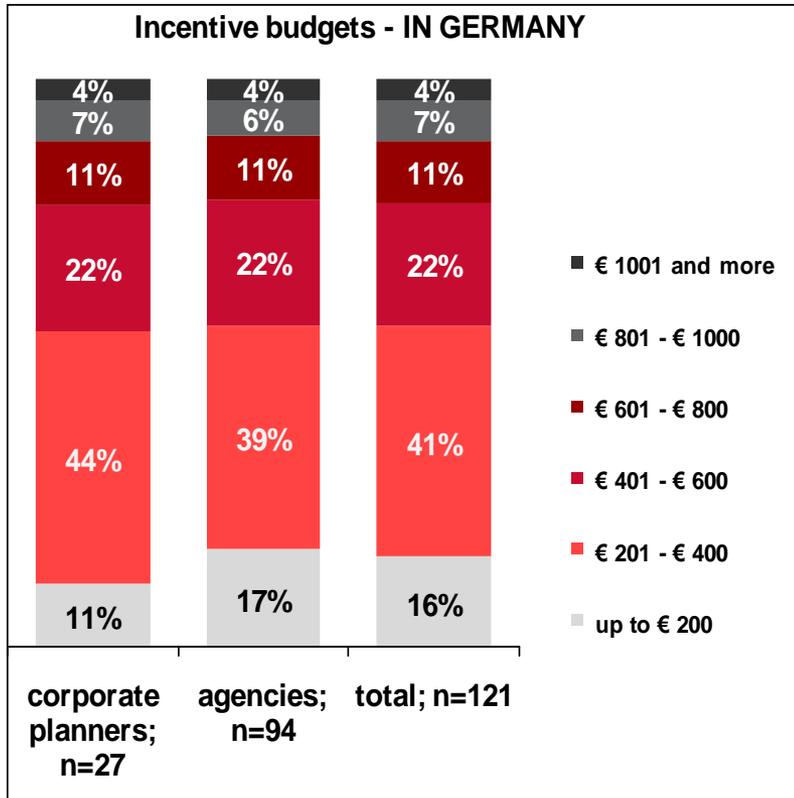
Concluding question 4.1.5, we can see that:

- Intermediaries from the German market book directly with hotels or venues when they are familiar with a destination. However, services provided by agencies/DMCs are still in demand, due to tight staff and time resources.
- A similar scenario is valid for corporate planners: the better they know a destination, the more directly they work with or have arrangements with hotel suppliers.
- Intermediaries who work with new or less known destinations, not only use specialized agencies such as DMCs but also book directly with hotels.
- Corporate planners use incentive house service, DMCs and hotels alike to nearly the same extent.

The range of partners consulted in the planning, organization and delivery of incentive travel is much more flexible than it used to be. German planners are sophisticated and experienced and apply direct or indirect ways of booking according to the individual requirements of a particular incentive trip.

## 4.1.6 Budgets for incentive travel

Question: What is the average budget per participant per day for incentive trips at the moment? (without travel / flight, only ground arrangements) (ONLINE SURVEY)



Ø €445

Ø €435

Ø €435

(n=121/122)

The average budget for domestic incentive trips is € 435 per participant per day. The average budget for incentive trips abroad is higher at € 610 per participant per day.

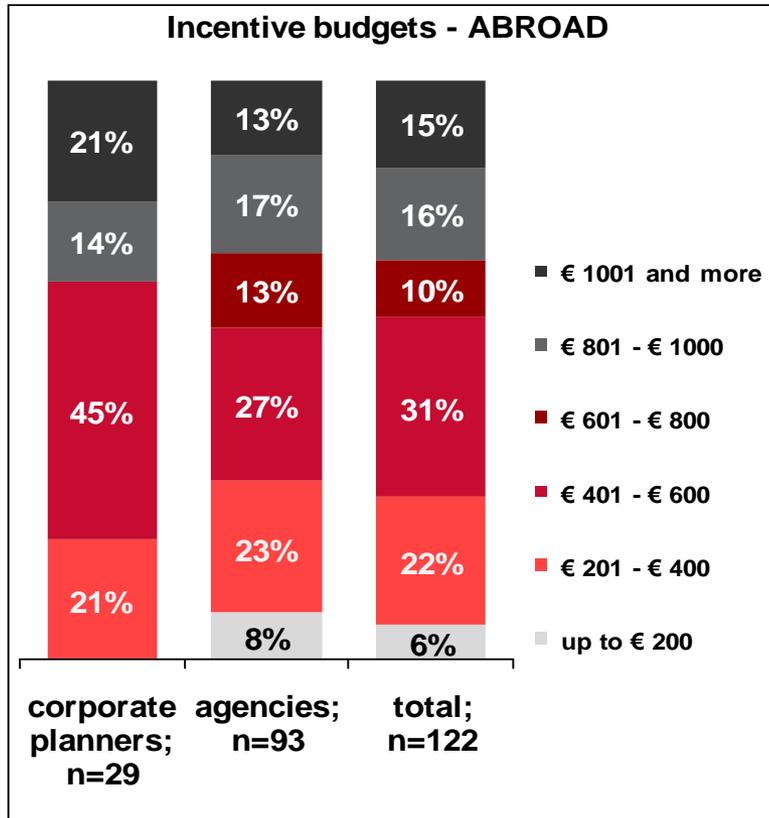
For most incentive travel carried out in Germany, planners have a budget range of € 200 to € 600 per participant per day at their disposal (62%). Higher budgets are also available for some domestic events: Every tenth interviewee stated that they had a budget of over € 800 per participant per day for such events.

For domestic incentive trips, 11% of corporate planners spend more than € 800 per participant per day. If we compare different industry sectors, none of them indicate a particular preference for a specific range of budget.

Planners that had more than € 800 per participant per day were from the banking, finance, insurance; food, beverages, tobacco and the industrial goods sectors.

## 4.1.6 Budgets for incentive travel

Question: What is the average budget per participant per day for incentive trips at the moment? (without travelling / flight) (ONLINE SURVEY)



Ø €635

Ø €600

Ø €610

(n=122)

Nearly every third planner can spend over € 800 per participant per day but some incentive trips have to run on lower budgets as well: About every fourth incentive planner has a budget of up to € 400 per participant per day.

Comparing corporate planners and incentive travel agencies, the highest budgets for incentive trips organized abroad are spent by corporate planners (Ø € 635) the average agency budget is slightly lower (Ø €600). On the other hand, 43% of agencies have budgets exceeding € 600 per participant per day – eight percent more in this range than corporate planners .

When it comes to industry sectors, corporate planners from the banking, finance and insurance sector appear to have the highest budgets for outbound incentive trips - 7 out of 12 companies whose budgets exceeded € 800 were from the banking, finance and insurance sector.

## 4.2 Trends in Procurement / Organization

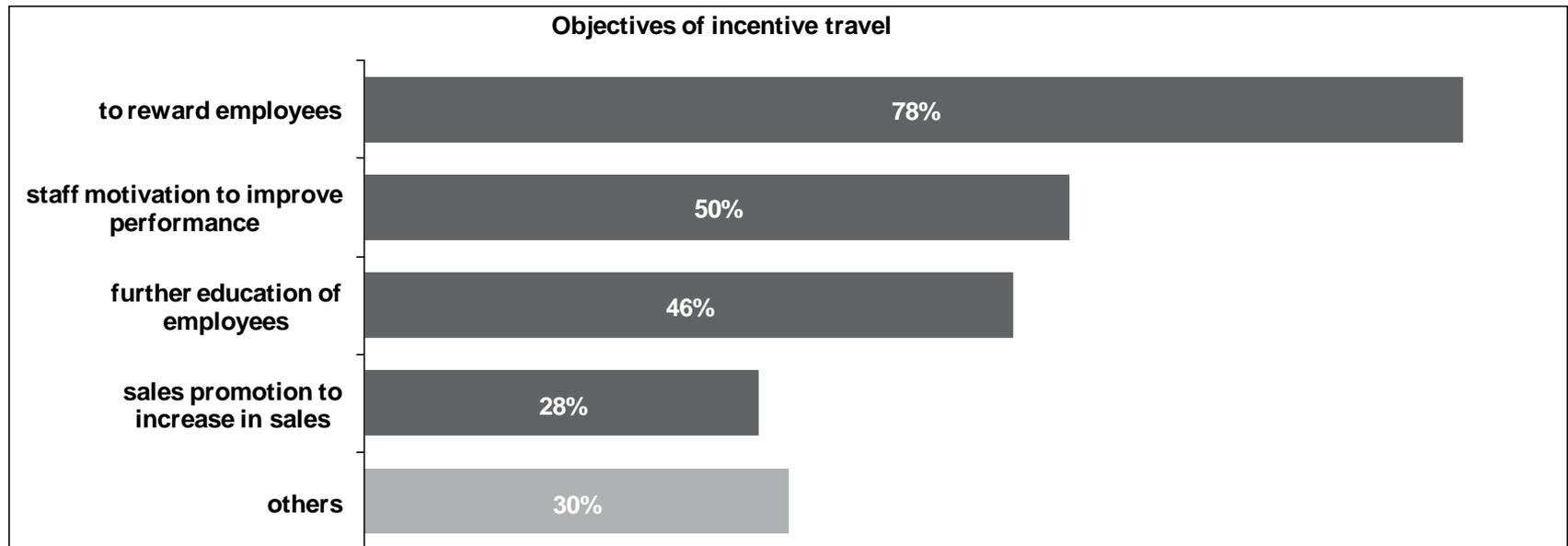
### Objectives

Procurement and changing patterns of procurement decision-making and purchasing behaviour are increasingly important topics in the international MICE industry. That is why a few key questions were selected here to identify the current situation of German planners with regard to procurement trends and procurement regulations. We asked different questions of planners in corporations and of planners in incentive travel agencies in order to compare and interpret the respective results.

As the sample of corporate planners in this research is rather small, we consider the agency results to be more accurate. Incentive travel agency involvement in procurement was seen to be greater than in the case of the corporate interviewees. Incentive travel agencies usually have a broader picture of industry trends and directions. They often work for several (corporate) clients and therefore have more possibilities to draw comparisons.

## 4.2.1 Corporate objectives

Question: *What corporate objectives does your company pursue with incentive travel? (TELEPHONE INTERVIEWS)*



(n=50; multiple answers possible; "others": 6x meeting with recreational program, 3x teambuilding, 3x development of new markets, 2x trainings with recreational program)

The main purpose of incentive travel in Germany at present is to reward (78 %) and to motivate employees to improve performance. This is valid for half of the planners. Further education and training (staff, sales forces, distribution) are also deemed very important .

About every fourth interviewee organizes incentives for the purpose of sales promotion and increased sales. The combination of meetings and teambuilding activities with recreational programs also plays an important role in this area.

## 4.2.1 Corporate objectives

The main purpose of incentive travel in Germany at present is to reward (78 %) and to motivate employees in order to improve performance and productivity. This is valid for half of the planners interviewed. Further education and training (staff, sales forces, distribution networks) are also deemed very important .

As this was a multiple answer question, it seems that **all** aspects are of importance to the planners concerned. The aspect of achieving pure sales / market share increases as a result of incentive travel is relatively small. Slightly more than a quarter (28 %) of the planners interviewed (both agency and corporate) ticked this option.

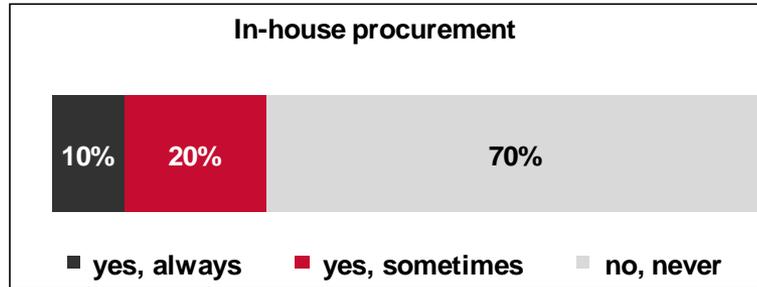
Rewards, recognition and motivation together with further education and training have strong meaning in the pursuit and organization of incentive / motivational travel in Germany. Receiving rewards exerts a strong motivational drive on performance. The high rank of “rewarding employees” might, however, also indicate that corporate budgets for incentive travel have been allocated in retrospect after performance has already been delivered and goals achieved as opposed to companies allocating budgets for strategic motivational purposes at the outset of any given financial year. This tendency may have been increased as a result of the current financial crisis.

An ongoing trend to include meetings in incentive travel programs was also confirmed. This, of course, frequently has specific tax reasons in Germany but also considerations of both corporate political correctness and strategic planning.

Answers to the interview option “other” mention the inclusion of “recreational programs” and teambuilding activities as important aspects of incentive trips.

## 4.2.2 In-house procurement (corporate planners only)

Question: Do you have to coordinate your incentive programs with an in-house procurement department? (TELEPHONE INTERVIEWS)



(n=20)

### If yes, in which way?

- if budgets for the whole program exceed € 5,000
- for the whole program
- budgets are arranged with corporate management
- for flights and hotel bookings
- consultation with corporate management for the whole program is obligatory
- for booking flights and hotels if a specific budget is exceeded

70 % of the corporate planners interviewed indicated that they do not need to co-operate and co-ordinate with a procurement department within their corporation.

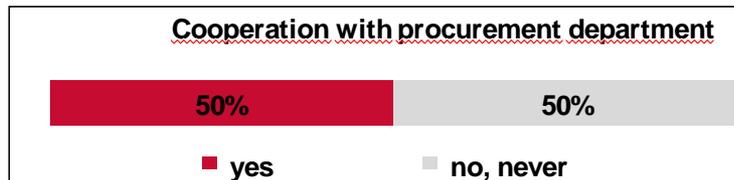
One third of the corporate planners interviewed have to consult either corporate management or a procurement department, mainly in cases where certain budgets are exceeded or for trip elements such as flights and hotel accommodation.

No particular preferences were evident among the different industry sectors – so we cannot say which industry mainly applies procurement policies.(answers came from financial, automobile, pharmaceutical, medical, chemical and industrial goods sectors alike)

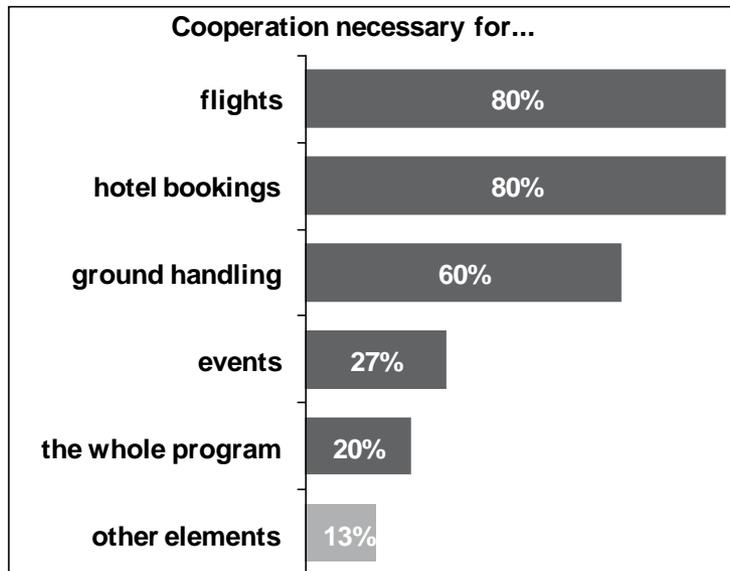
Comparing this result with the result of the following question, where agencies are also asked for their evaluation of the same subject, it would indeed appear that only a third of companies have specific procurement policies (30 %).

### 4.2.3 Cooperation with procurement department (incentive agencies only)

Question: For which parts of incentive programs do you have to cooperate/consult with the procurement department of your corporate customers – in addition to their event department? (TELEPHONE INTERVIEWS)



(n=30)



(n=15; multiple answers possible; "others": not specified)

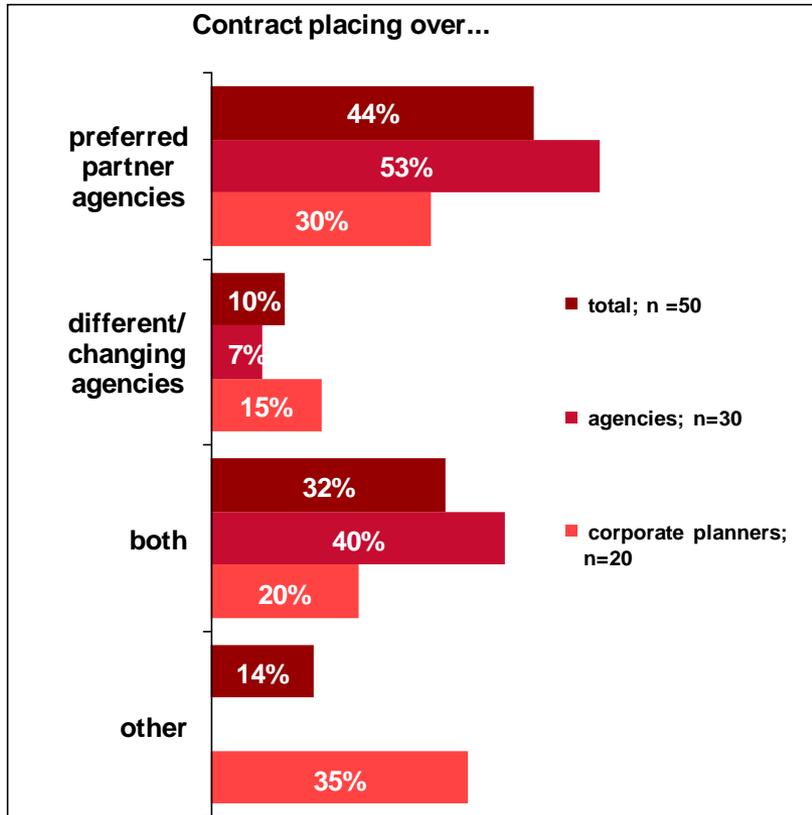
This question clarifies the obligation of intermediaries to deal with procurement policies and departments in their clients' corporations. We have a broader picture of the situation from the agency perspective (due to the smaller sample of corporate respondents). Half of the incentive travel intermediaries cooperate with their clients' procurement departments not only for flights and hotel bookings but also for ground handling services.

Corporate procurement policies are stricter for flights and for hotel bookings. Corporate purchasing / procurement departments have contracts with providers mainly in these two areas. Strict comparisons and controls are applied here. Quite frequently, complete ground handling has also to be cross-checked against corporate procurement policies.

Tighter budget controls, together with policies of always using the lowest cost offers, are currently dictating procurement policies in Germany in general.

## 4.2.4 Contract placing

Question: How do you place orders for incentive travel program services? (TELEPHONE INTERVIEWS)



(n=50; "other": 6x without partners, cooperation with hotels)

As both incentive travel agents and corporate planners were asked this question, preferred partners here can mean both domestic incentive houses as well as ground handling/DMC partners.

The majority of German incentive travel organisers prefer to cooperate with a known and preferred partner (44 %). Strong reasons for this result, besides company contracts, are tighter budgets along with other cost restrictions and controls enforced during the current economic crisis.

When planners are constricted in both time, financial and human resources, it is quite natural that they should co-operate with partners they already know and work well with. This is a safer investment than trying out someone new.

10 % of planners work **only** with different and changing agencies (no preferred partners at all).

Every third interviewee works with **both** preferred partners and with changing partners.

## 4.2.4 Contract placing

Answers to this question also indicate a tendency to co-operate with suppliers directly, without getting any agency partner involved. (“other”).

The result confirms that German incentive planners are in general rather **loyal** once they have established a particularly good working relationship with a partner agency.

It is often difficult for suppliers new to the German market to “break” into existing business relationships – this can only be achieved by medium-term strategic and consequent marketing efforts. However, once such a relationship has been established, German clients are in general very loyal.

## 4.3 Future perspectives

We included a final question on personal perspectives and evaluations of the future of incentive travel in Germany in the telephone interviews - in the form of an „open“ question which allowed for free flow of associations and perceptions, and in the online survey in the form of multiple answer options and evaluations.

As expected, **financial developments** and their impact on incentive travel planning, program structure and duration worry incentive planners most. The phenomenon of „less budget – less time – less distance“ is perceived as an ongoing issue.

Trends concerning **content** of incentive trips reveal no real news. These are essentially:

- Less fun/leisure towards the integration of more „serious“ issues such as training and further education
- Lifestyle matters exerting an increasing influence on program design (health, food, sports)
- More value and more quality – but less budget
- Call for „more originality“ – but this has been an issue for the incentive travel industry since day one



## 4.3 Future perspectives

Question: Where do you (personally) see the future of incentive travel? (TELEPHONE INTERVIEWS – OPEN QUESTION)



(n=50; open question; "others": please see comments on the right)

### Trends:

- One third of answers to this question by incentive travel planners predict no particular changes for the foreseeable future of incentive travel.
- 30 % are concerned about smaller budgets and shorter distances and trip duration, which means: less long-haul / more Europe or less Europe / more domestic Germany.
- Several answers refer to changes in the contents of incentive travel programs. "classical" – fun and leisure programs will decrease (16 % of answers) and will be increasingly combined with further education or training elements (another 16 % of answers). This indicates that incentive travel should deliver more added-value with regards to education and training than in the past.
- only a small group of interviewees expect a development back to "good old times", with higher budgets and more long-haul travel.
- Single individual opinions ("other") are: more self-organized programs; more active / sporting elements; clients are well-informed about destinations and prices, which sometimes causes a difficult cooperation; sustainability is becoming more important; trend towards wellness, relaxation.

## 5 Conclusions

Incentive programs and travel are prone to a steady process of adjustment and adaption to changing parameters in the economy and society. They will remain an important segment of corporate events and are still considered the best option for rewarding and motivating people – and this is what our industry is all about.

The German market for incentive travel programs remains massive with around 1.500 agencies seriously involved in this business segment. These are nurtured by approx. 4.500 companies who apply incentive travel as a fixed part of their performance improvement strategies and measures. However, scope, budget, evaluation, controlling, duration and target destinations are currently in a state of flux. These need to be carefully monitored on a regular basis in order to keep track of the industry and keep up with client service requirements and trip delivery expectations.

The German MICE industry has witnessed accelerating changes in terms of needs, expectations and demands since the start of the current financial crisis in the autumn / fall of 2008. Incentive travel is a sensitive part of corporate events policy and the industry needs sound data and potent arguments in order to refute political and ethical concerns. We hope that this study is a stepping-stone in this process. Our industry also needs to learn how to involve an increasingly important “3rd party” – i.e. the procurement executives - not only confronting them with final program suggestions and costs but also involving them in program conception and development. That way they will come to better understand the important emotional and productivity aspects of incentive travel as a business tool.

Predictions of economic improvement in Germany are very positive as we write and a wide range of industries is already on a fast improvement track. With opportunities growing, it is important that ethics and fairness do not lose their value in the search for the best benefit. Win/win situations between planners and suppliers must be sought and supported by both sides. An industry which is based on motivational concerns cannot reduce its efforts to simplistic monetary issues – it needs to be cautiously optimistic, multi-levelled, creative, lively and value-driven in order to further motivate all people involved to develop their very best talents, ideas and performances and to adapt the incentive / motivational travel tool to future challenges and new applications.

We trust that the results of this 2010 Site International Foundation study of the German incentive & motivational travel market will help you to achieve some of your goals and to better understand this important market.

Johanna Fischer, tmf GmbH Munich September 23, 2010

## 5 Schlussbemerkung

Incentive-Programme und -reisen müssen sich ständig an veränderte gesellschaftliche und wirtschaftliche Rahmenbedingungen anpassen. Sie werden stets ein wichtiger Teil von Corporate Events bleiben und werden noch immer als eines der effektivsten Instrumente für die Belohnung und Motivation von Menschen angesehen – und darum geht es in unserer Branche.

Der deutsche Incentive-Markt bleibt nach wie vor sehr groß, etwa 1.500 Agenturen sind an diesem Segment beteiligt. Ergänzend dazu gibt es etwa 4.500 Unternehmen, die Incentive - Reisen als festen Bestandteil ihrer Strategien zur Leistungssteigerung anwenden. Dennoch sind Umfang, Budget, Nachbereitung, Controlling, Dauer und Ziele der Incentive - Reisen derzeit im Wandel. Dieser Wandel sollte regelmäßig und sorgfältig untersucht werden, um einen Überblick über den Markt zu behalten und um sich auf die veränderten Anforderungen von Kunden einstellen zu können.

Seit dem Beginn der Wirtschaftskrise im Herbst 2008 hat die deutsche MICE Branche starke Veränderungen hinsichtlich der Anforderungen, Erwartungen und Ansprüche an Incentive - Reisen erlebt. Incentive - Reisen sind ein besonders sensibler Teil der Unternehmenspolitik, und die Branche braucht solide Daten und schlagkräftige Argumente, um politische und ethische Bedenken ausräumen zu können. Wir hoffen, dass diese Studie ein Schritt in die richtige Richtung ist. Unsere Branche muss außerdem lernen, wie eine immer wichtiger werdende dritte Partei – die Einkaufsabteilung – in die Planung involviert werden kann. Die Einkäufer sollten nicht nur mit finalen Programmvorschlägen und Kosten konfrontiert werden, sondern in die Konzeption und Entwicklung des Programms involviert werden. So gibt man ihnen die Chance, die emotionalen und produktivitätssteigernden Aspekte von Incentive - Reisen besser zu verstehen.

Die Prognosen für einen Konjunkturaufschwung in Deutschland sind derzeit sehr positiv und vielen Branchen geht es momentan schon wieder viel besser als noch vor kurzer Zeit. Bei solch positiven Aussichten ist es wichtig, dass Ethik und Fairness bei der Suche nach dem größtmöglichen Gewinn nicht auf der Strecke bleiben. Win-Win-Situationen zwischen Planern und Anbietern müssen etabliert und von beiden Seiten unterstützt werden. Eine Branche, deren Hauptaufgabe die Motivation ist, kann ihr Augenmerk nicht auf rein monetäre Themen richten – sie muss optimistisch, vielschichtig, kreativ, lebendig und wertorientiert sein. Sie sollte alle Beteiligten motivieren, ihre Talente und Ideen einzubringen, und das Beste zu geben, um Incentive- und Motivationsreisen an zukünftige Anforderungen und Herausforderungen anzupassen. Wir sind sicher, dass die vorliegende Studie ein hilfreiches Instrument für Sie ist und Ihnen einen tiefen Einblick in diesen wichtigen Markt verschafft. Wir hoffen, dass Sie Ihnen ebenfalls hilft, einige Ihrer Ziele verwirklichen zu können.

Johanna Fischer, 23. September 2010

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