Incentive Travel Industry Survey Final

Final Q-by-Q analysis prepared by Oxford Economics

Complete surveys (n = 1,306) and incomplete surveys (n = 1,331)

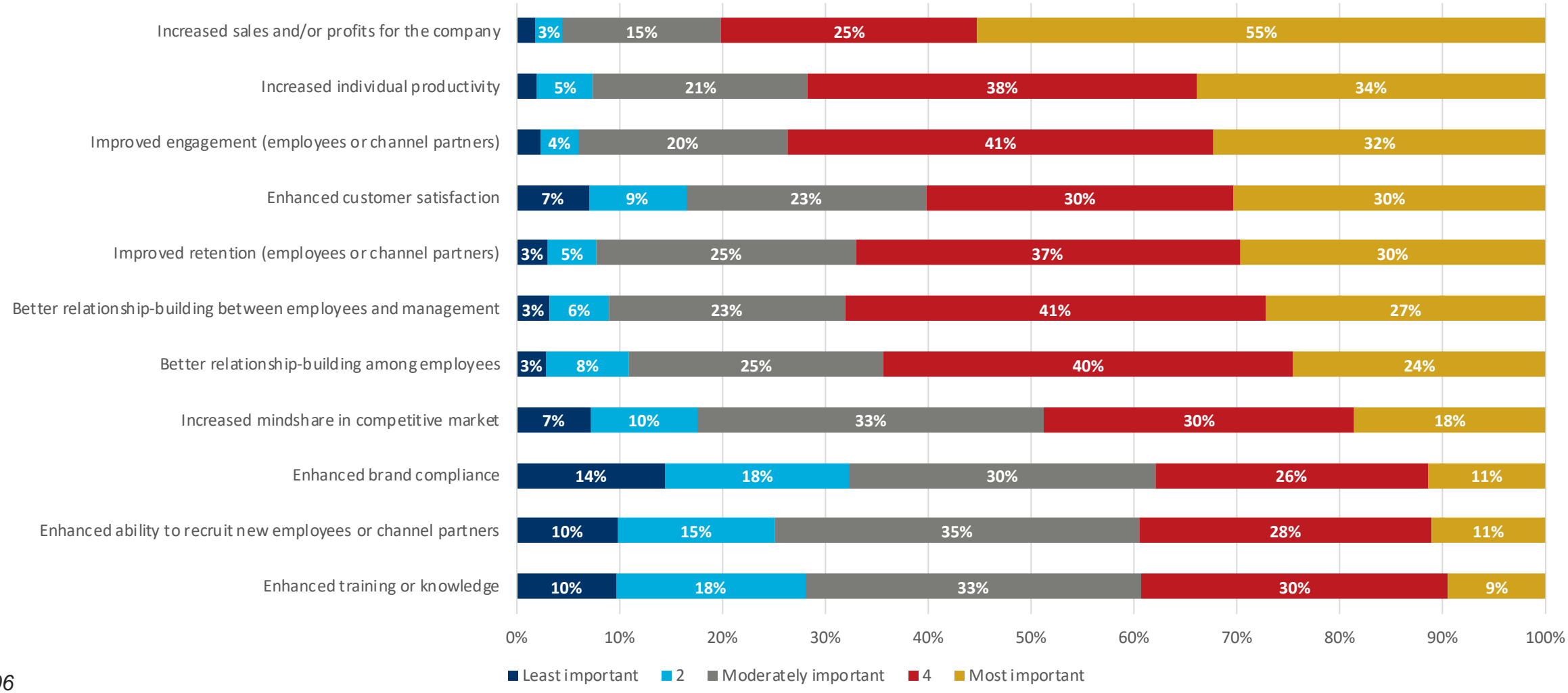
August 2019

OXFORD ECONOMICS

Global survey results

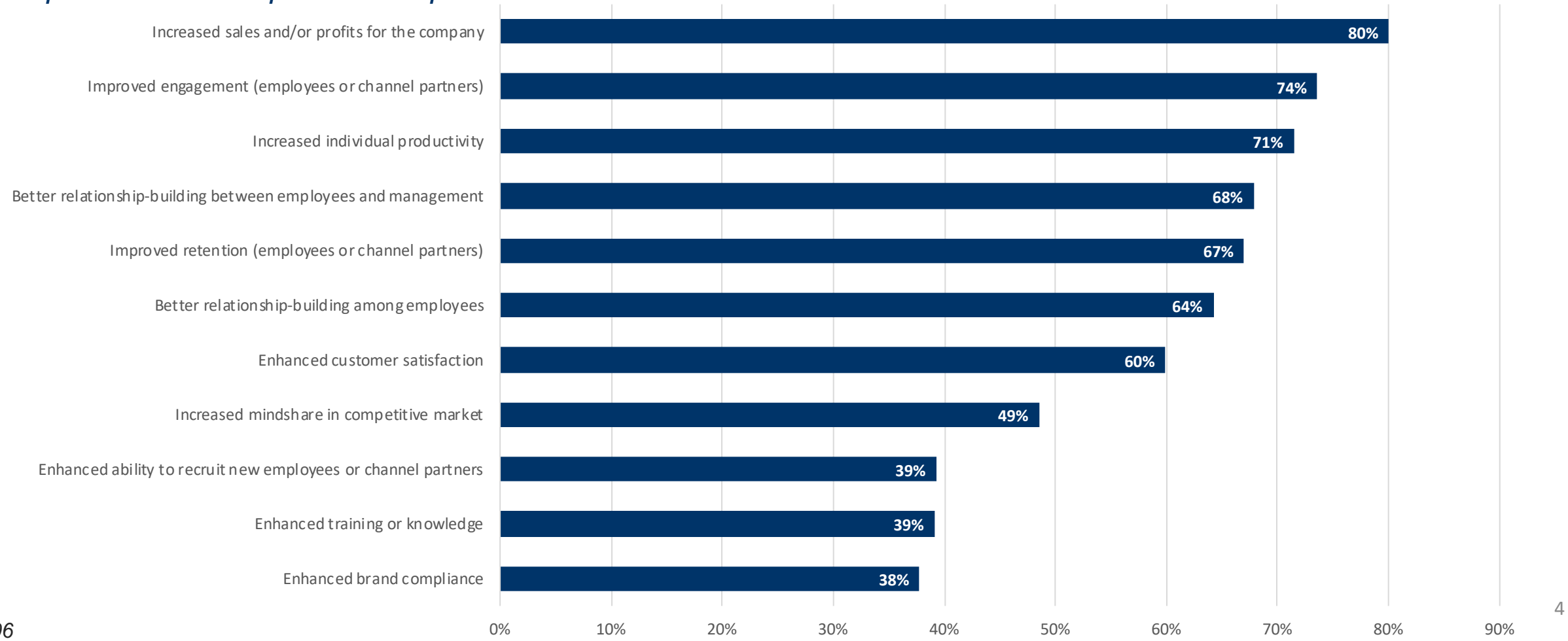
OXFORD ECONOMICS

B1. What are the most important benefits your company receives from its incentive travel programs? Incentive travel agencies should answer from the perspective of their client companies.



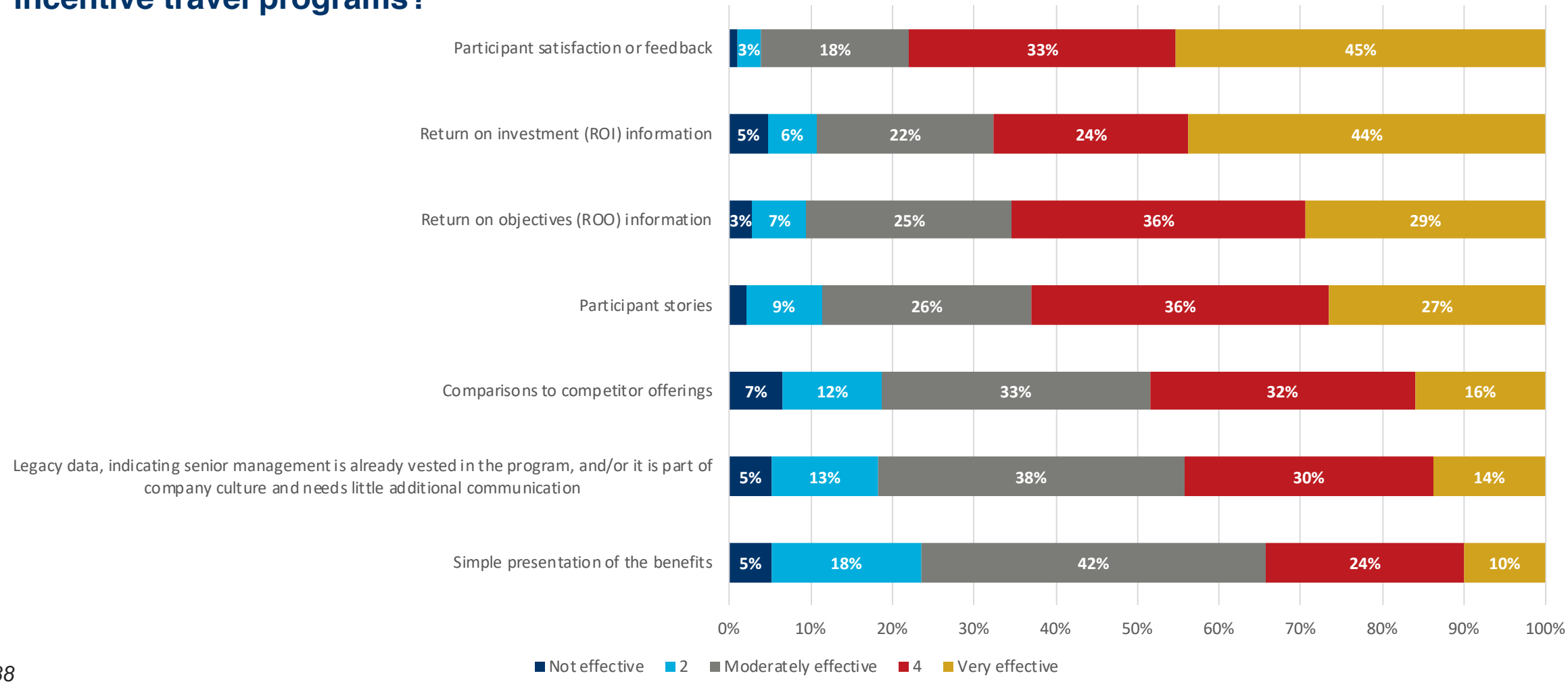
n= 606

B1. What are the most important benefits your company receives from its incentive travel programs? Incentive travel agencies should answer from the perspective of their client companies. *"Most important" and "Important" responses*



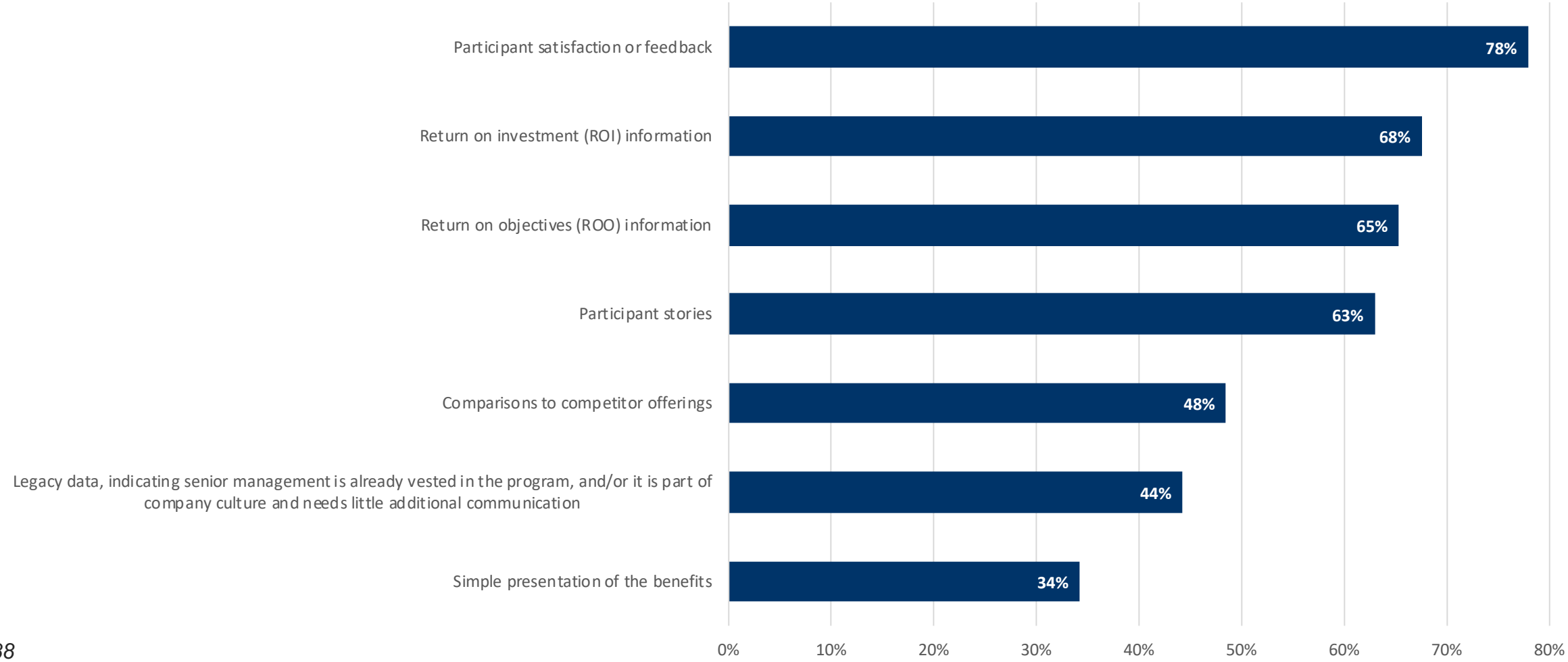
n= 606

B2. Which types of information are most effective at demonstrating the value of the incentive travel program to senior management and other stakeholders at the corporations for whom you organize incentive travel programs?



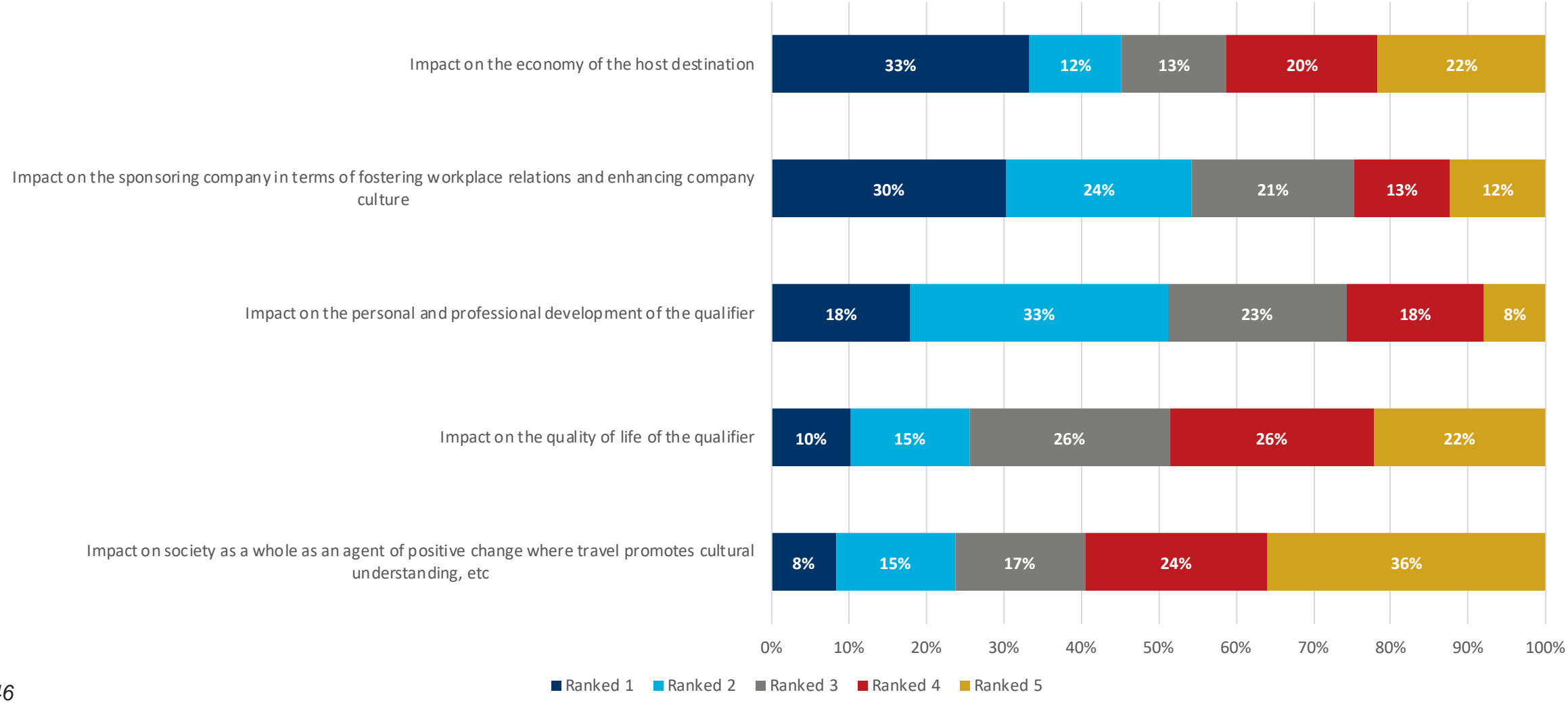
n= 588

B2. Which types of information are most effective at demonstrating the value of the incentive travel program to senior management and other stakeholders at the corporations for whom you organize incentive travel programs? *"Very effective" and "Effective" responses*



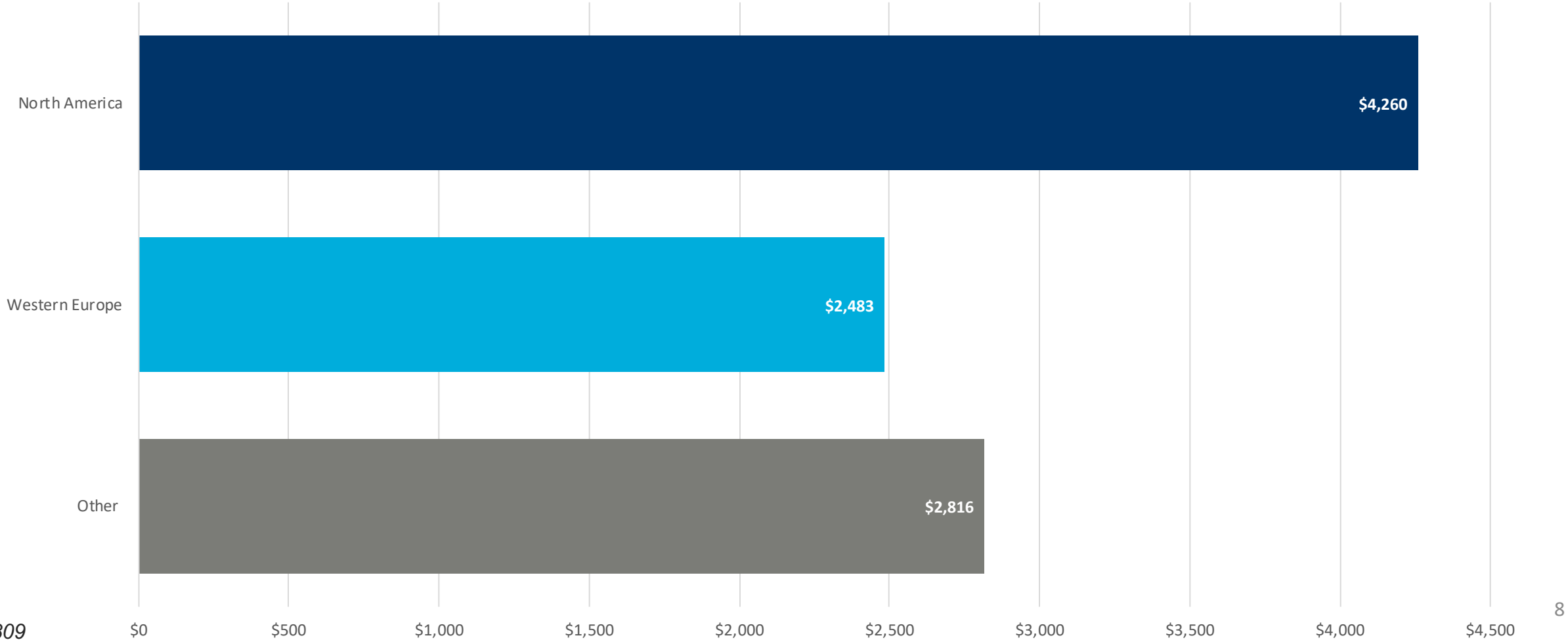
n= 588

B3. Beyond the impact of the incentive travel program on the sponsoring company's bottom line, which additional impacts of incentive travel are most significant?



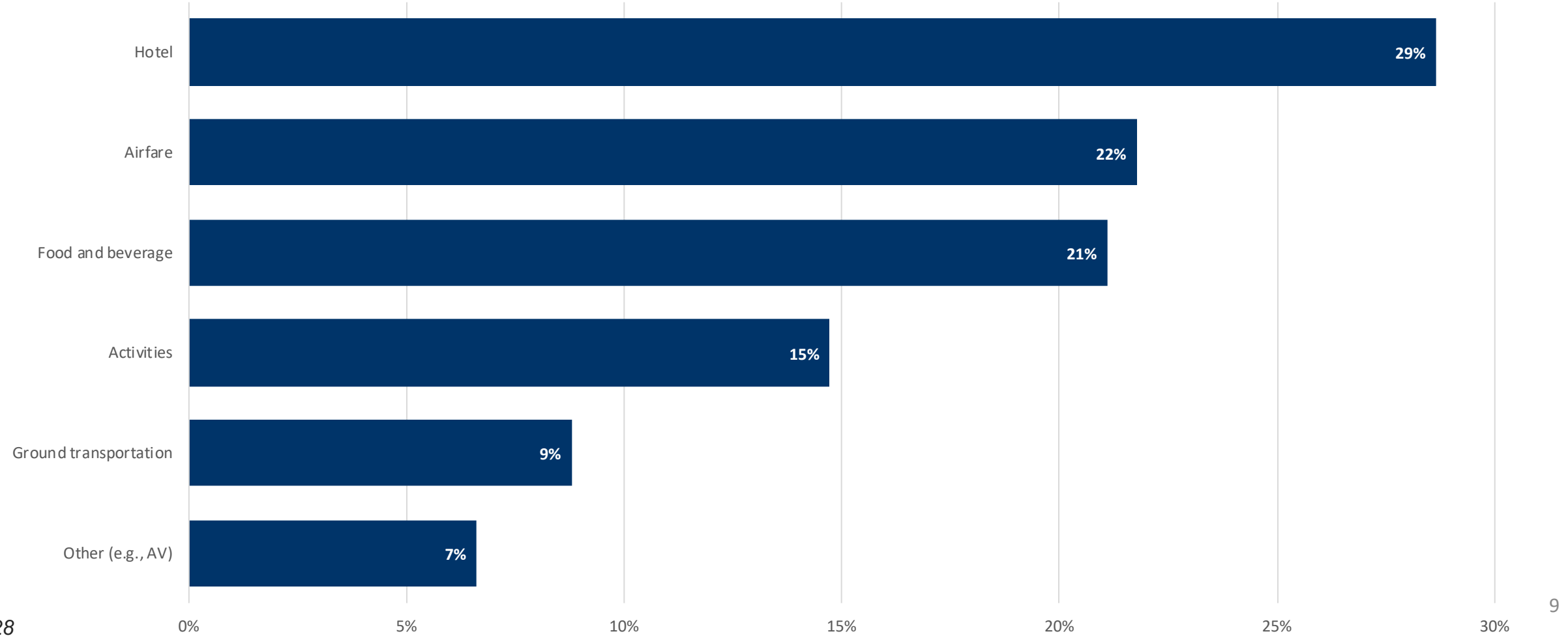
n= 846

G1A. What is the approximate spend per person (total program cost divided by number of people, including qualifiers, guests and other participants in the count of people) for incentive travel programs occurring this year (2019) for which your team was responsible?



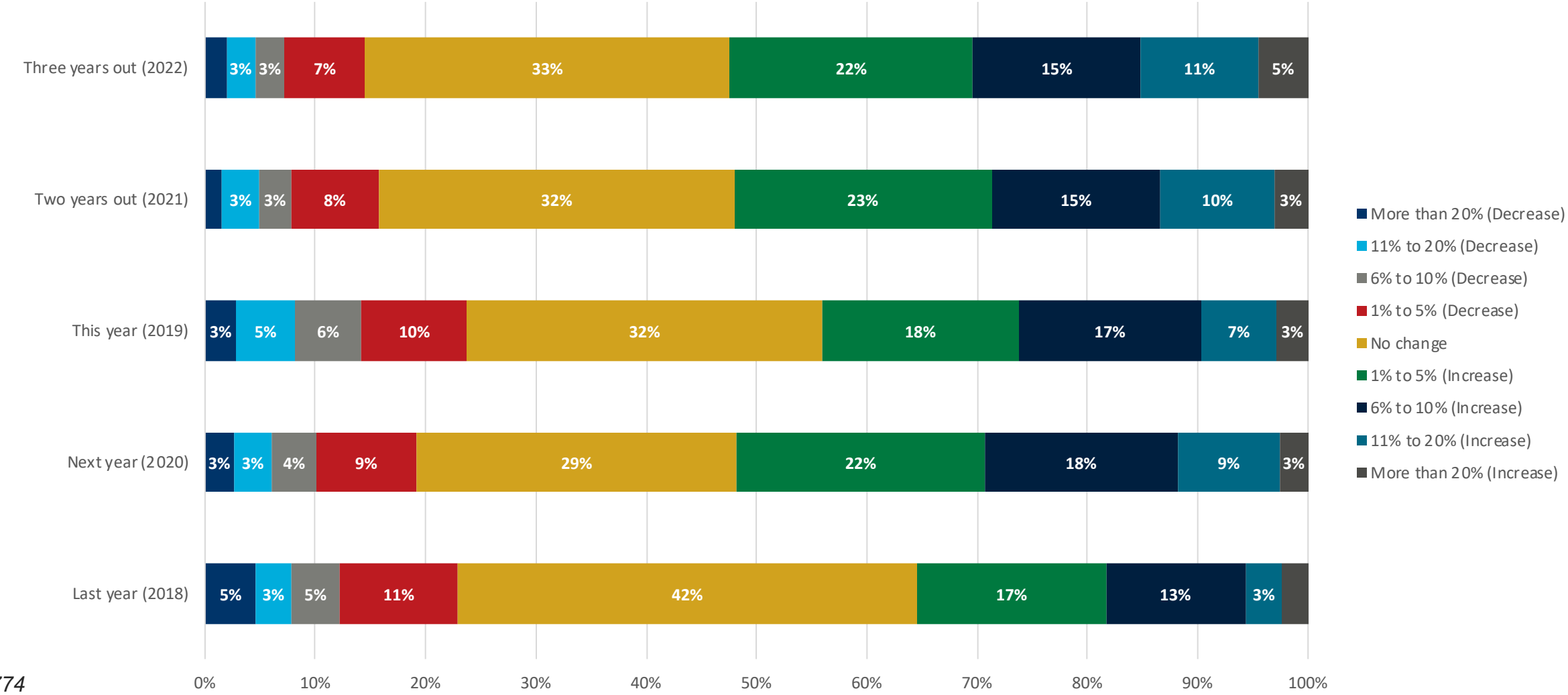
n= 1,809

G2. While mindful that no two programs are the same, please indicate the average program budget allocation for incentive travel programs occurring this year (2019) for which your team was responsible.



n= 828

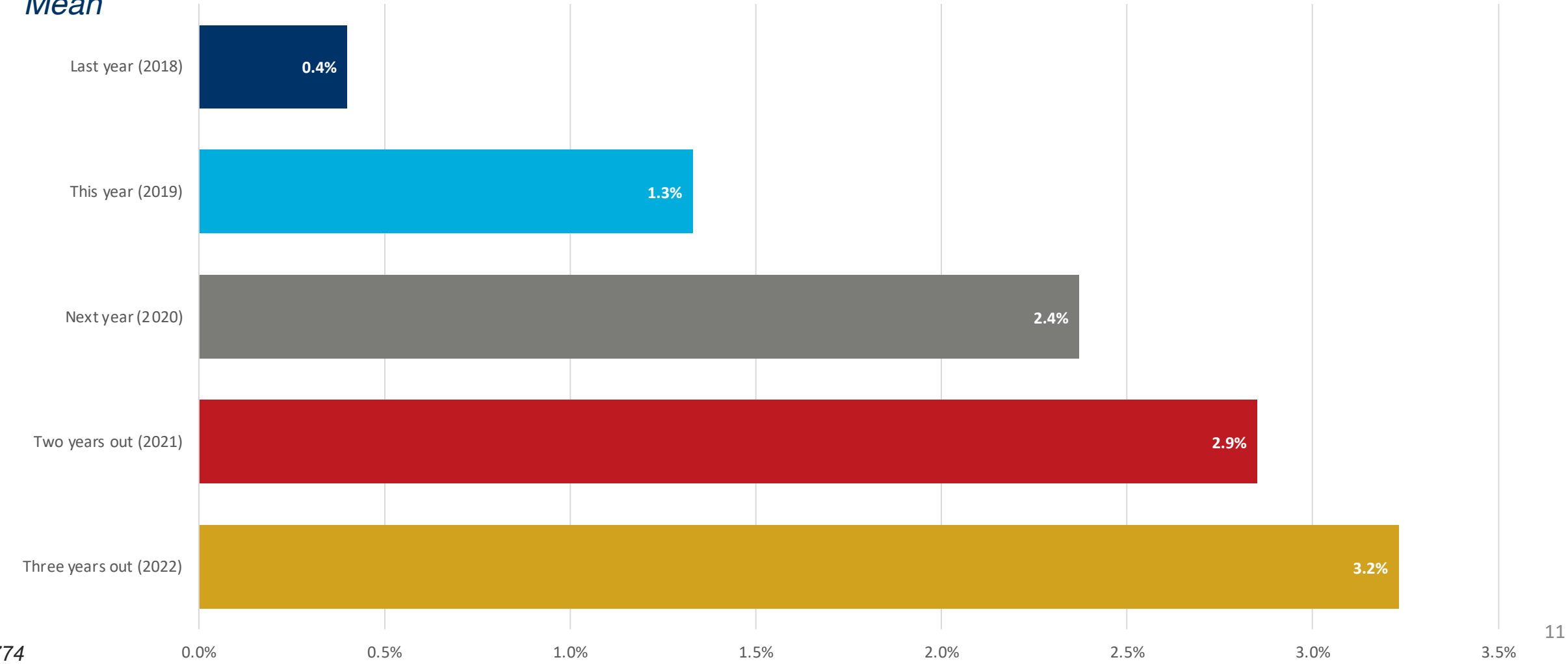
G3. How has the number of people (qualifiers, guests and other participants) in your team's incentive travel programs changed recently? How do you expect it to change this year and in future years?



n= 774

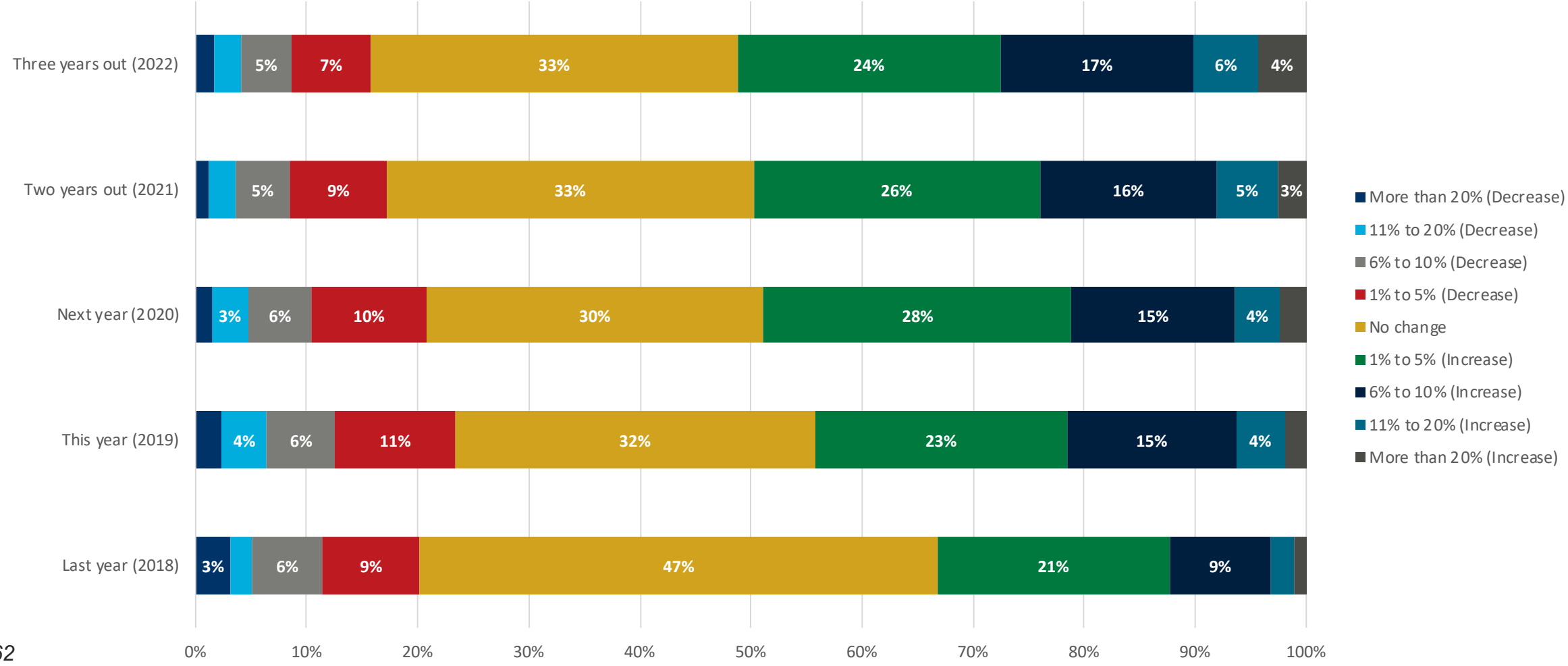
G3. How has the number of people (qualifiers, guests and other participants) in your team's incentive travel programs changed recently? How do you expect it to change this year and in future years?

Mean



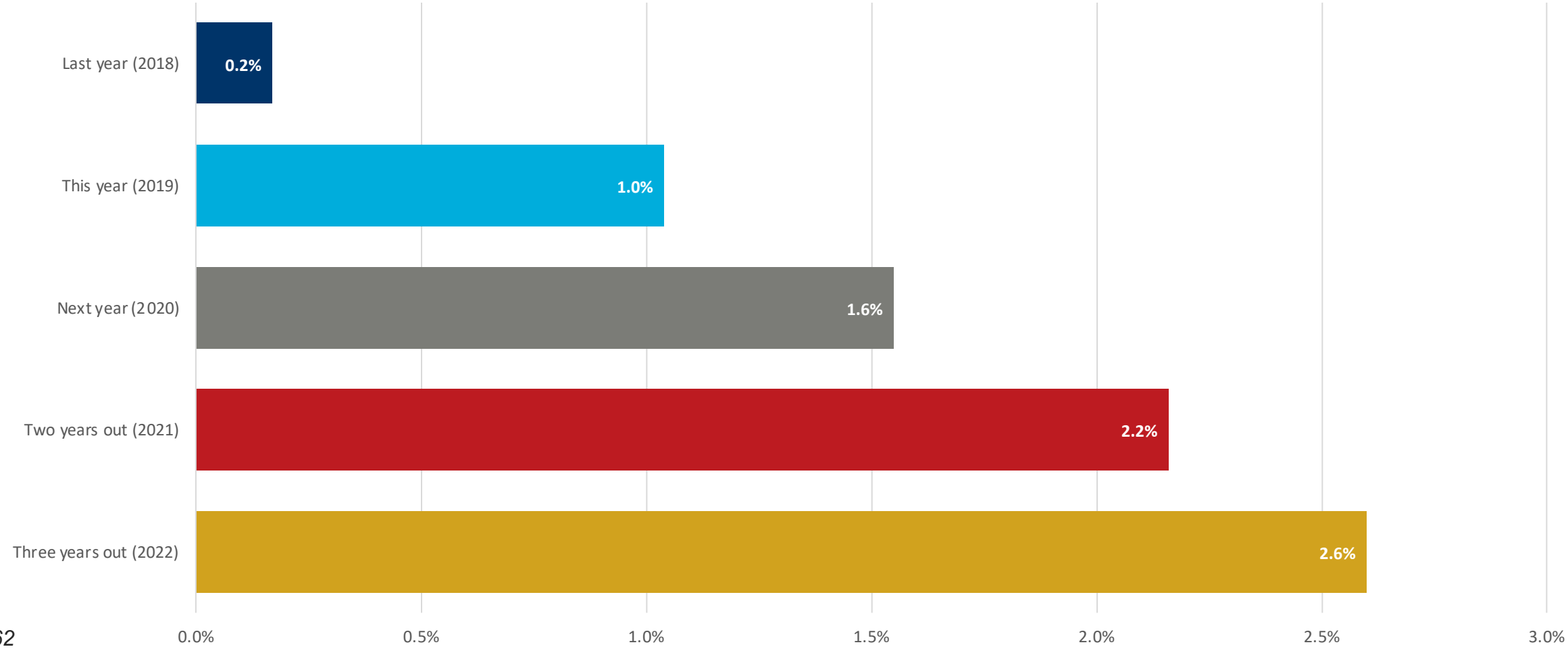
n= 774

G4. How has spending per person (total program cost divided by number of people, including qualifiers and guests in the count of people) in your team's incentive travel programs changed recently? How do you expect it to change this year and in future years?



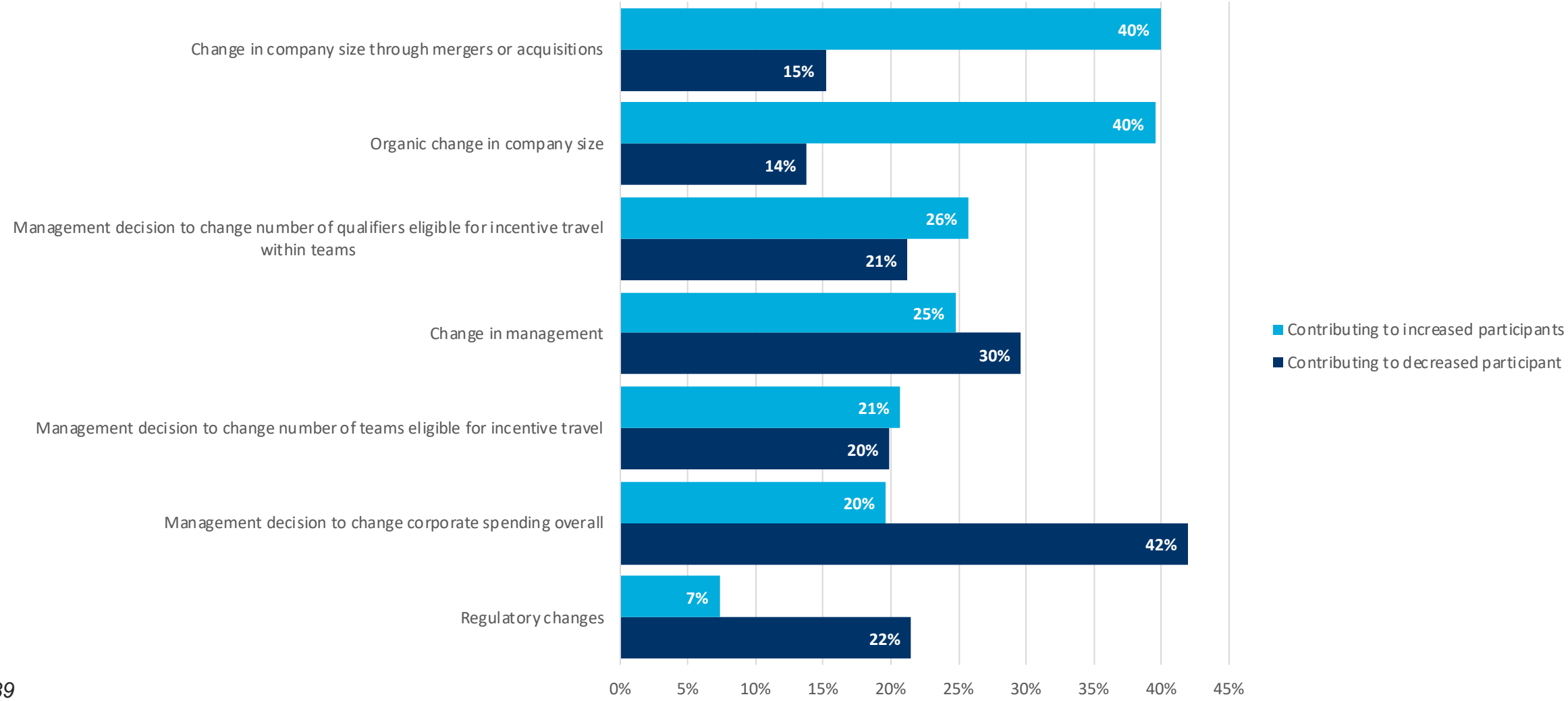
n= 762

G4. How has spending per person (total program cost divided by number of people, including qualifiers and guests in the count of people) in your team's incentive travel programs changed recently? How do you expect it to change this year and in future years? *Mean*



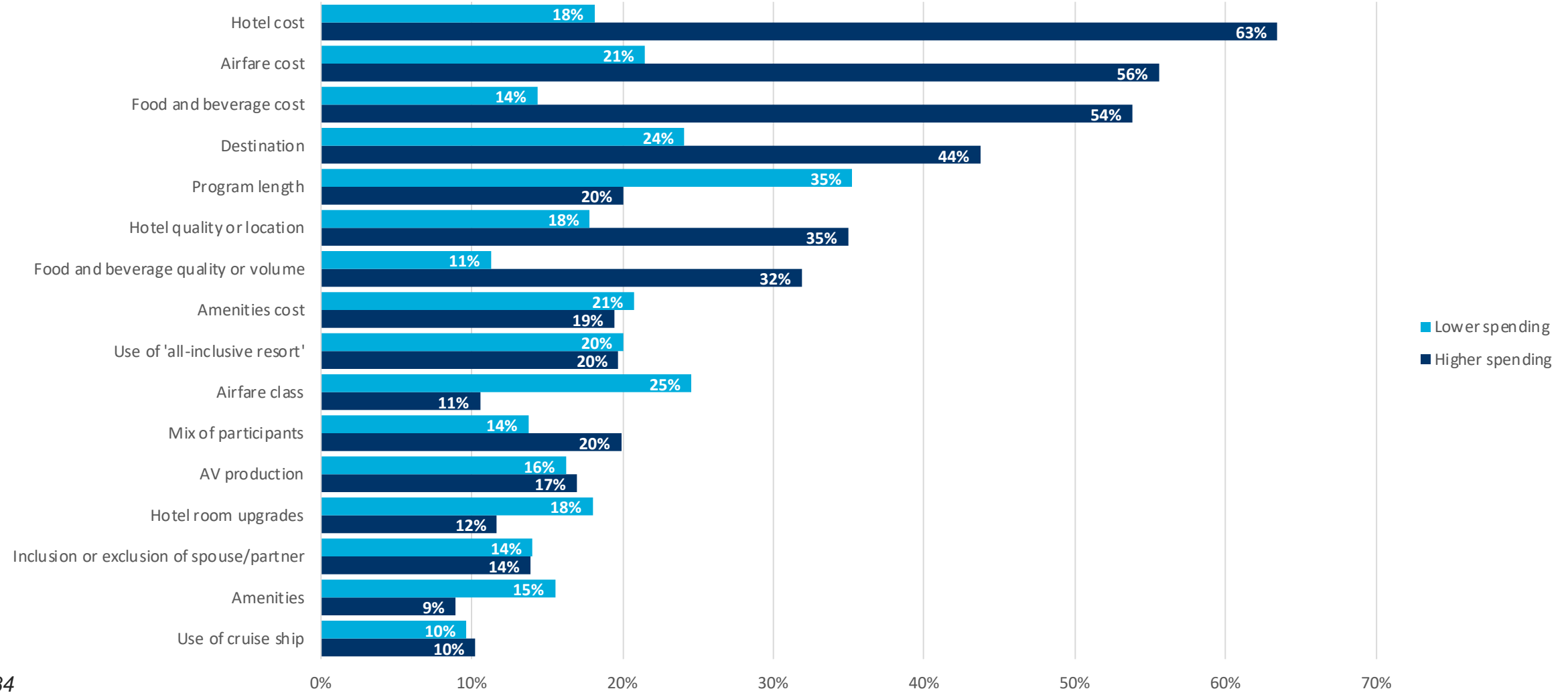
n= 762

G5. What are the key trends impacting the number of people (qualifiers, guests and other participants) in your team's incentive travel programs over the next 2 years (2020 and 2021)?



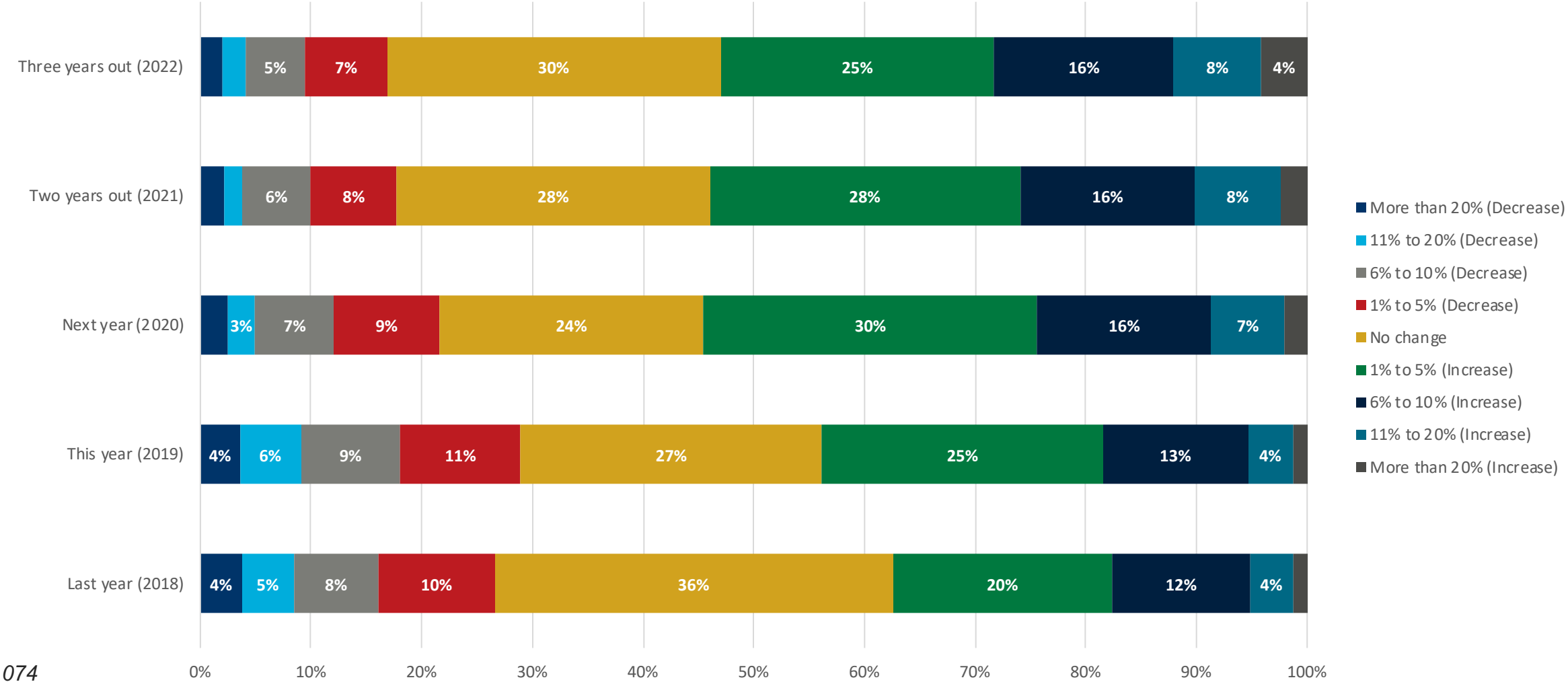
n= 739

G6. What are the most important trends impacting spending per person in your team's incentive travel programs over the next 2 years (2020 and 2021)?



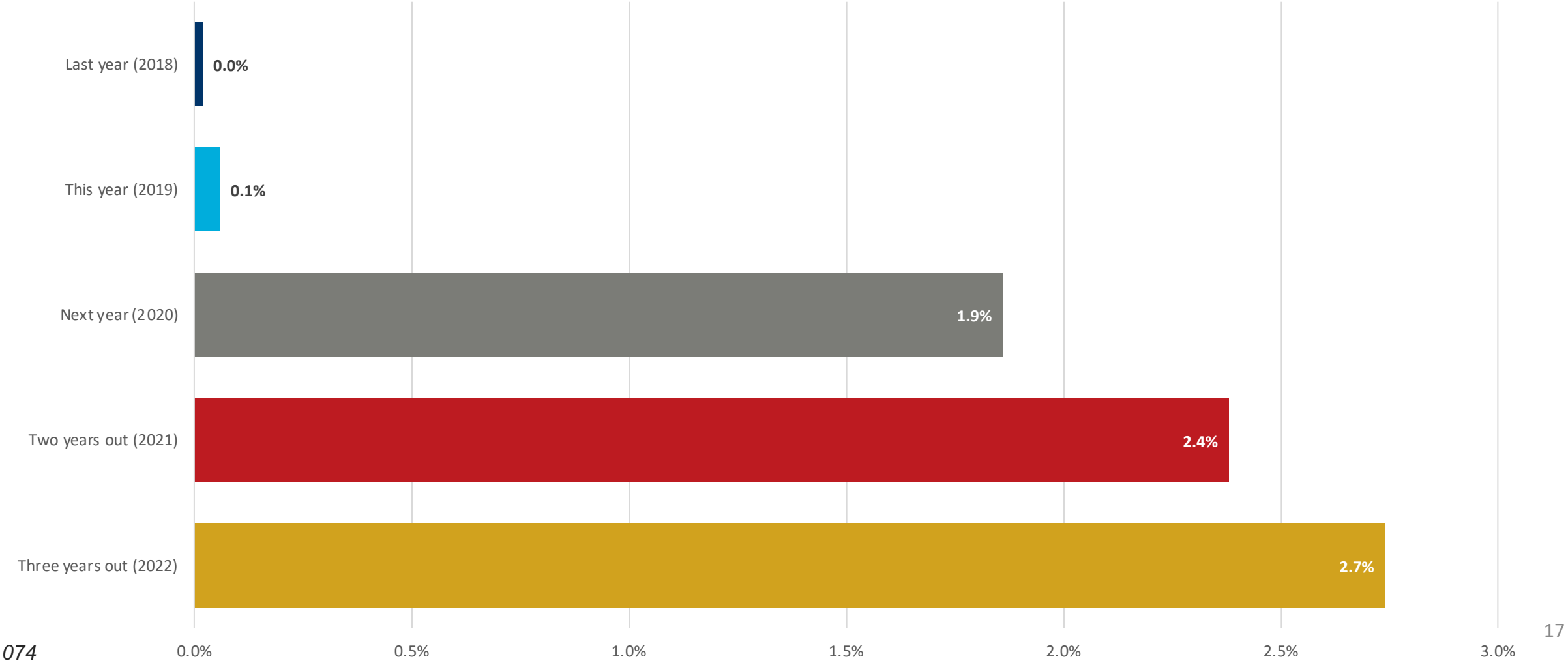
n= 684

G7. How did incentive travel budgets change for programs in which your team was involved last year? How do you expect budgets to change in future years?



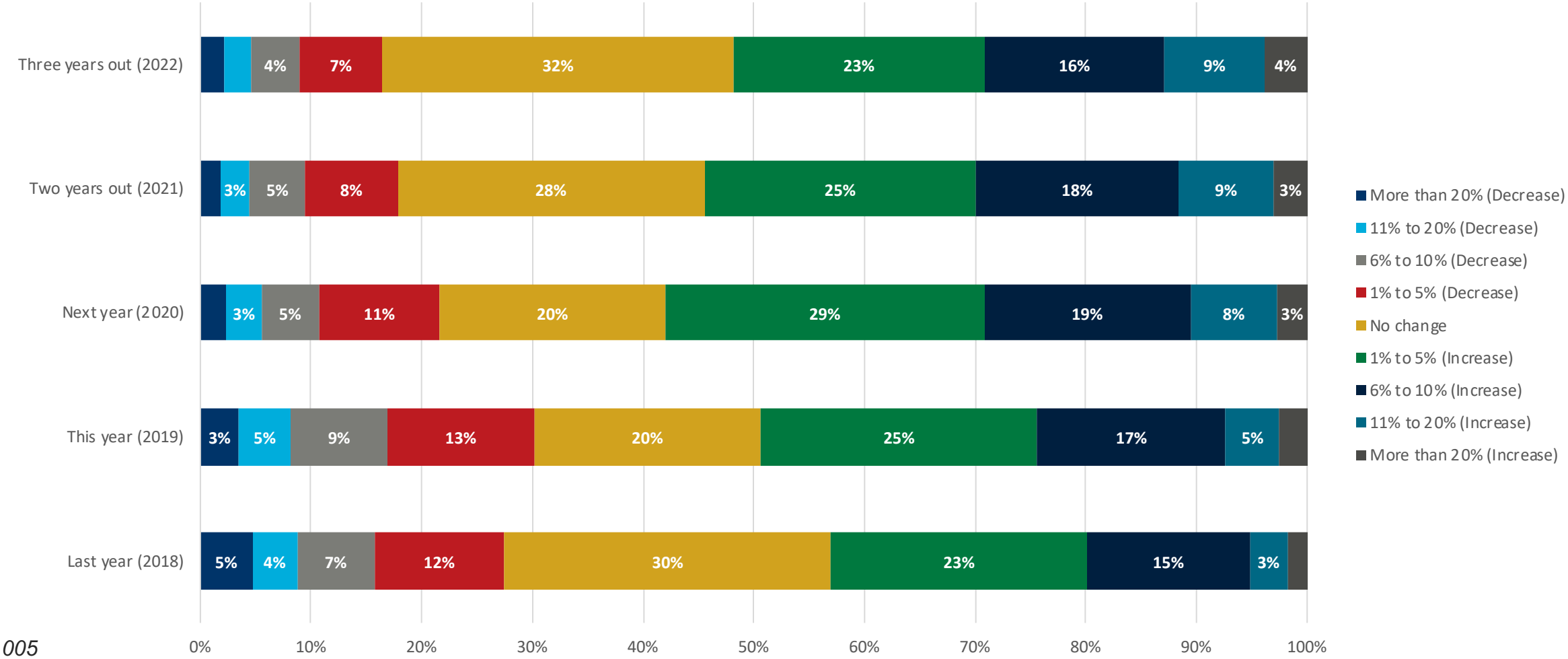
n= 1,074

G7. How did incentive travel budgets change for programs in which your team was involved last year? How do you expect budgets to change in future years? *Mean*



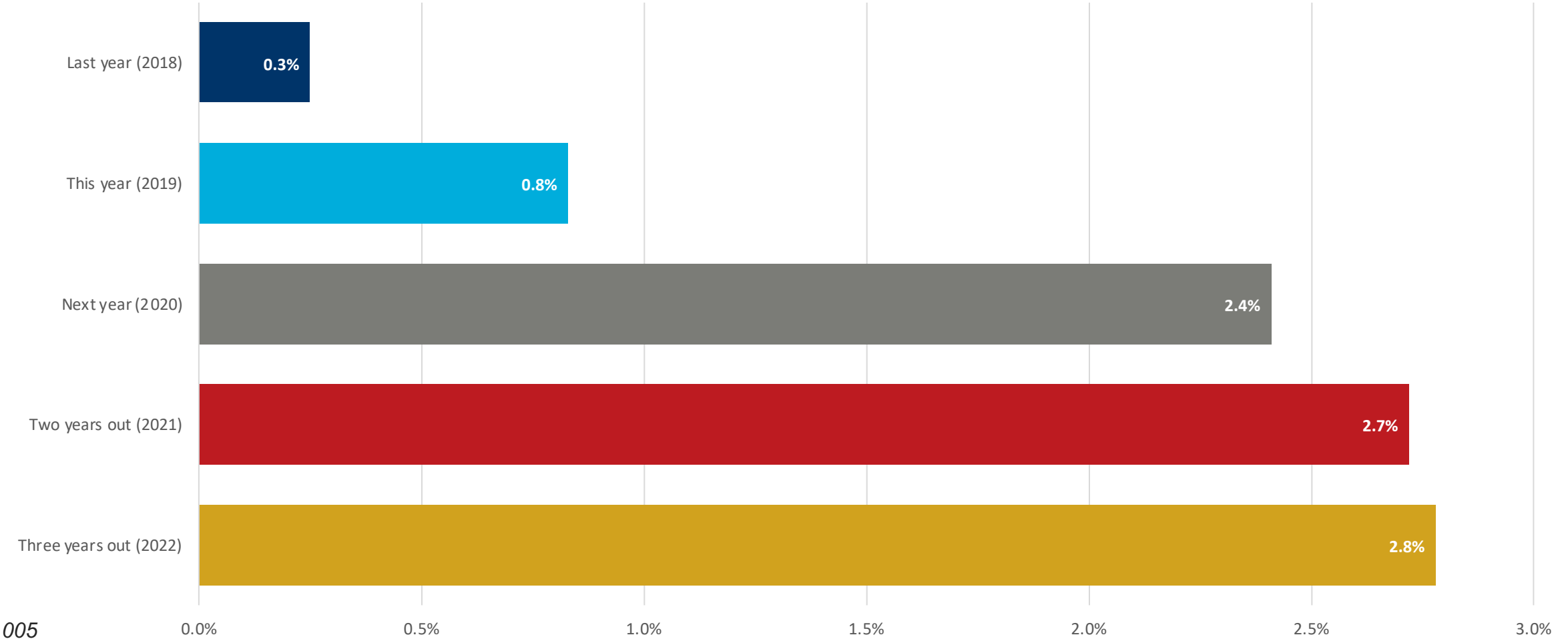
n= 1,074

G8. How has the volume of RFPs for incentive travel programs changed in the most recent 2 years (2018 and 2019)? How do you expect that to change for programs occurring over the next 3 years (2020 – 2022)?



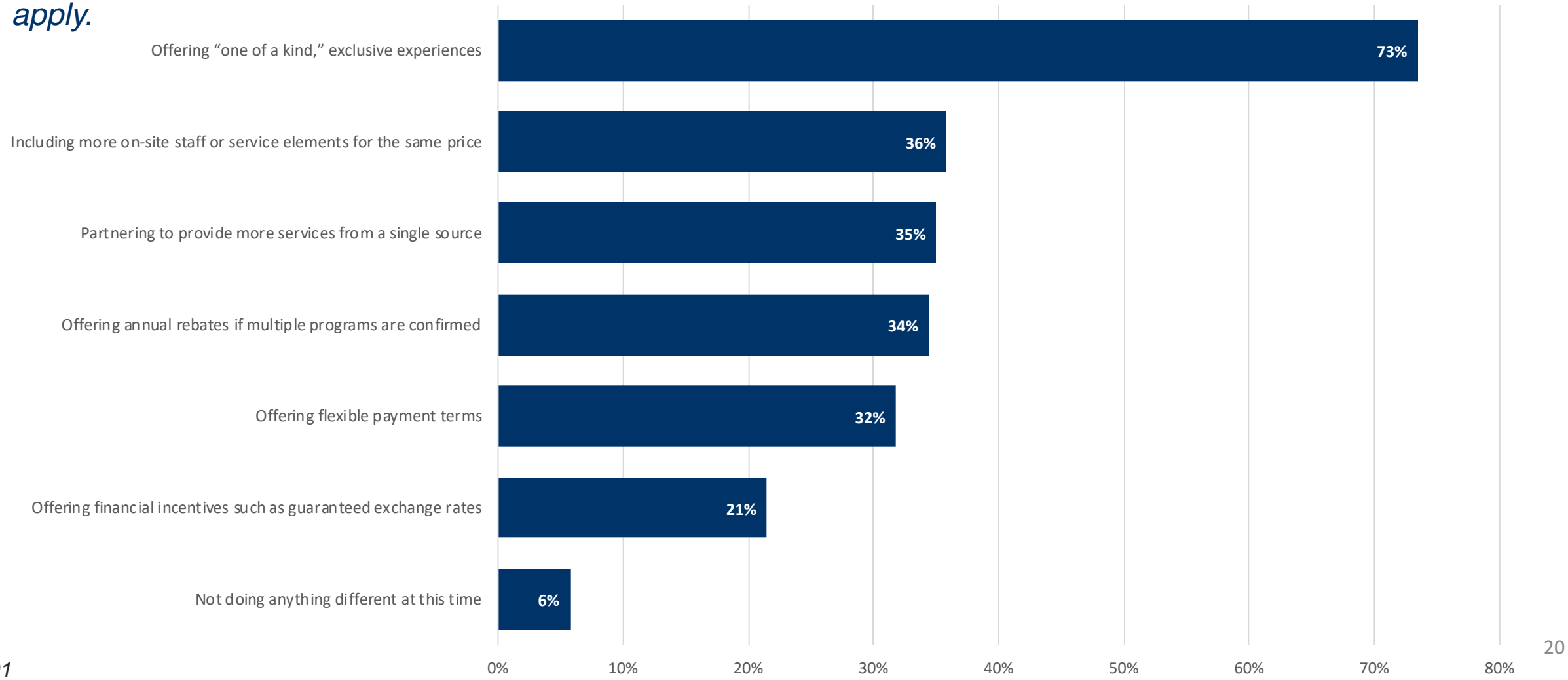
n= 1,005

G8. How has the volume of RFPs for incentive travel programs changed in the most recent 2 years (2018 and 2019)? How do you expect that to change for programs occurring over the next 3 years (2020 – 2022)? *Mean*



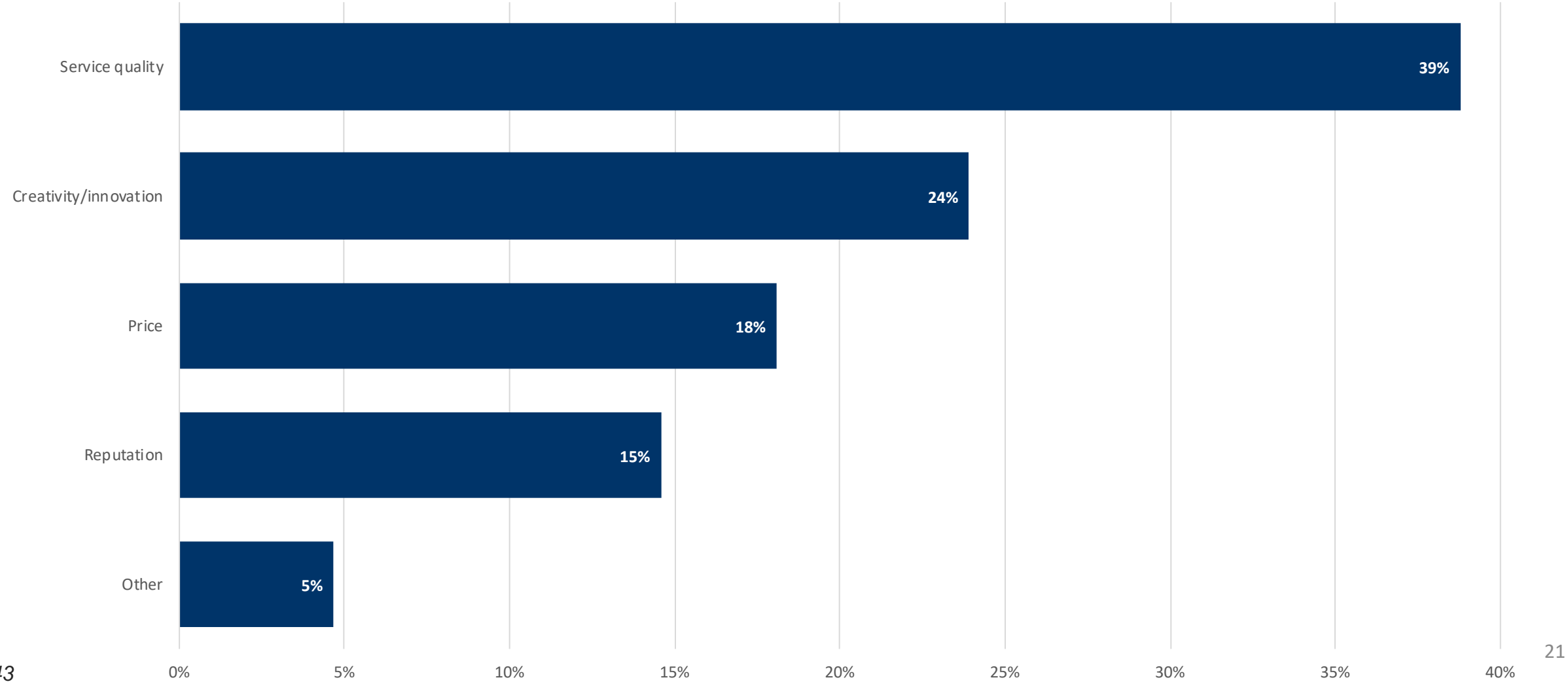
n= 1,005

G9. When competing for contracts for incentive travel programs occurring during the next 2 years (2020 and 2021), what actions are your team taking to add value and win business? *Select all that apply.*



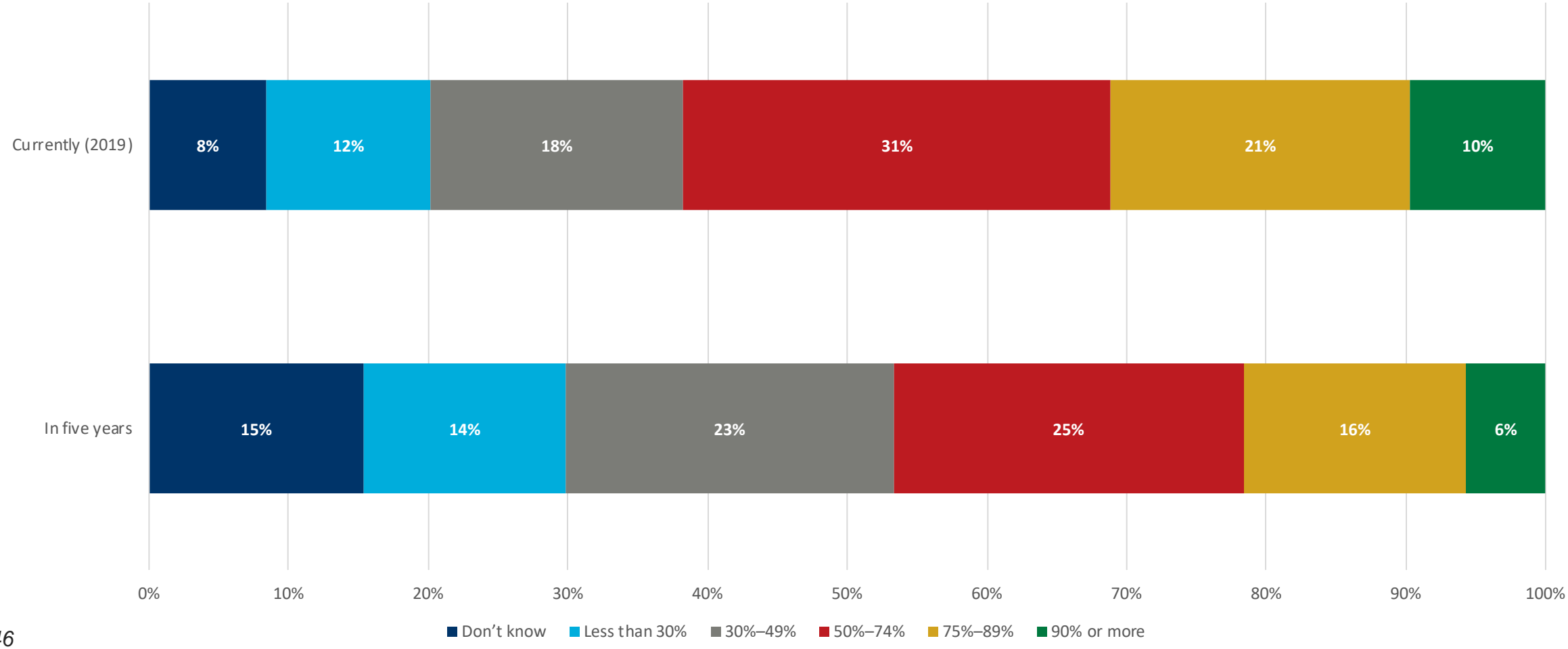
n= 991

G10. What factor do you consider your strongest differentiator to win incentive travel program business?



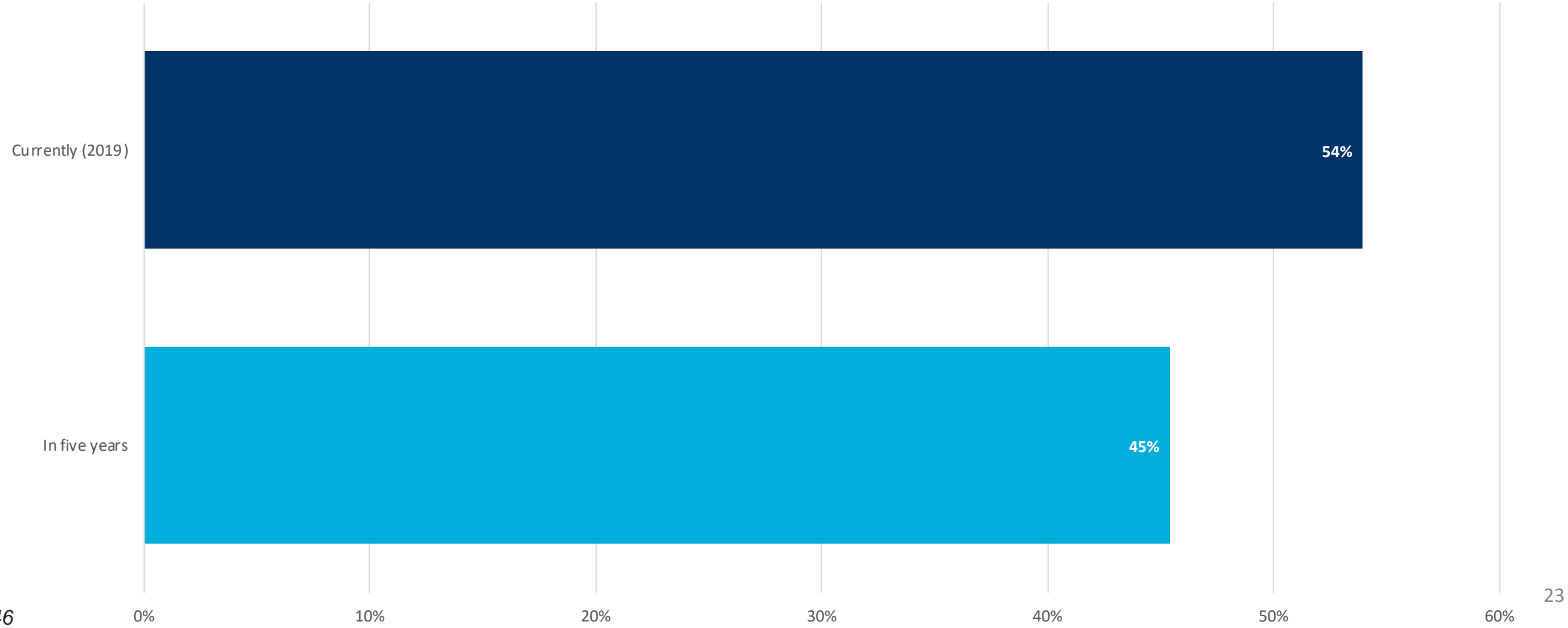
n= 343

G11. What percentage of the overall spend per person in the destination (transportation, hotel, off-site functions) do you estimate is channeled through a DMC currently (2019)? How much will be channeled through a DMC in five years?



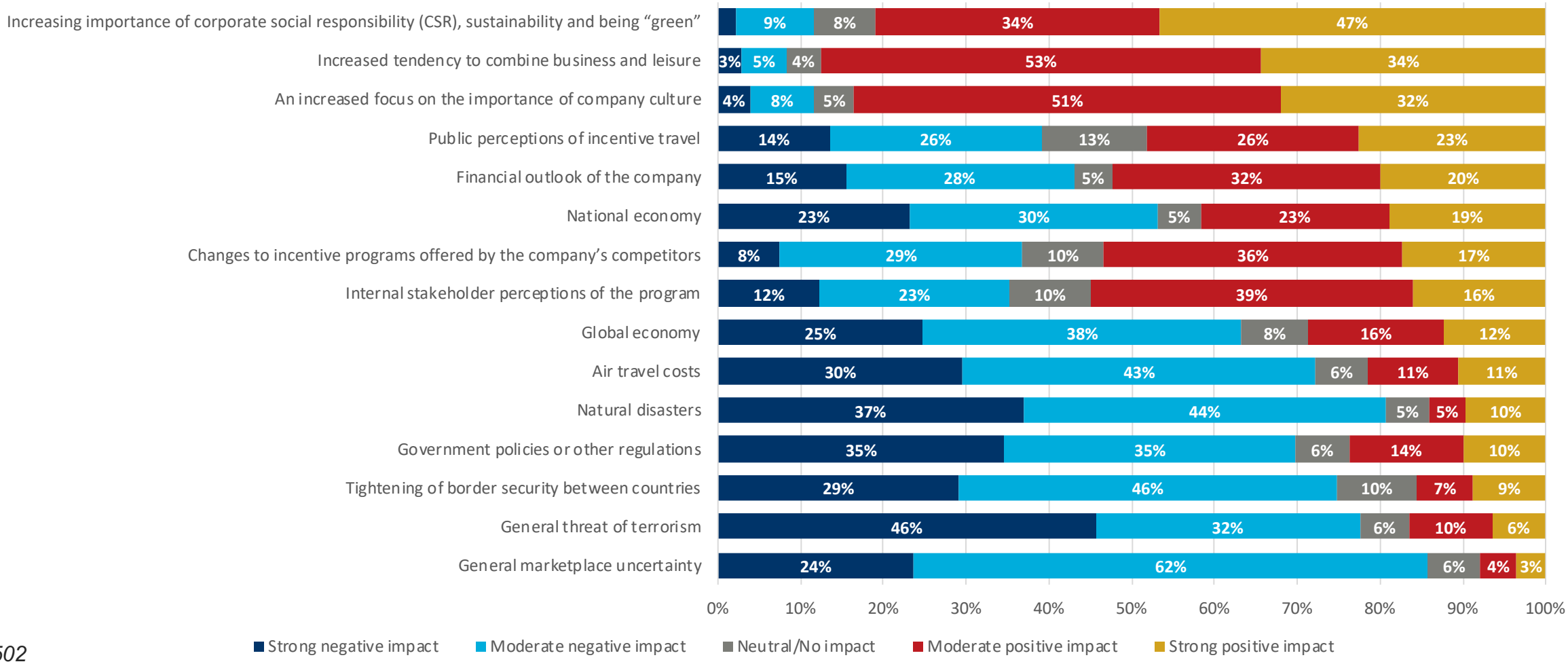
n= 546

G11. What percentage of the overall spend per person in the destination (transportation, hotel, off-site functions) do you estimate is channeled through a DMC currently (2019)? How much will be channeled through a DMC in five years? *Mean*



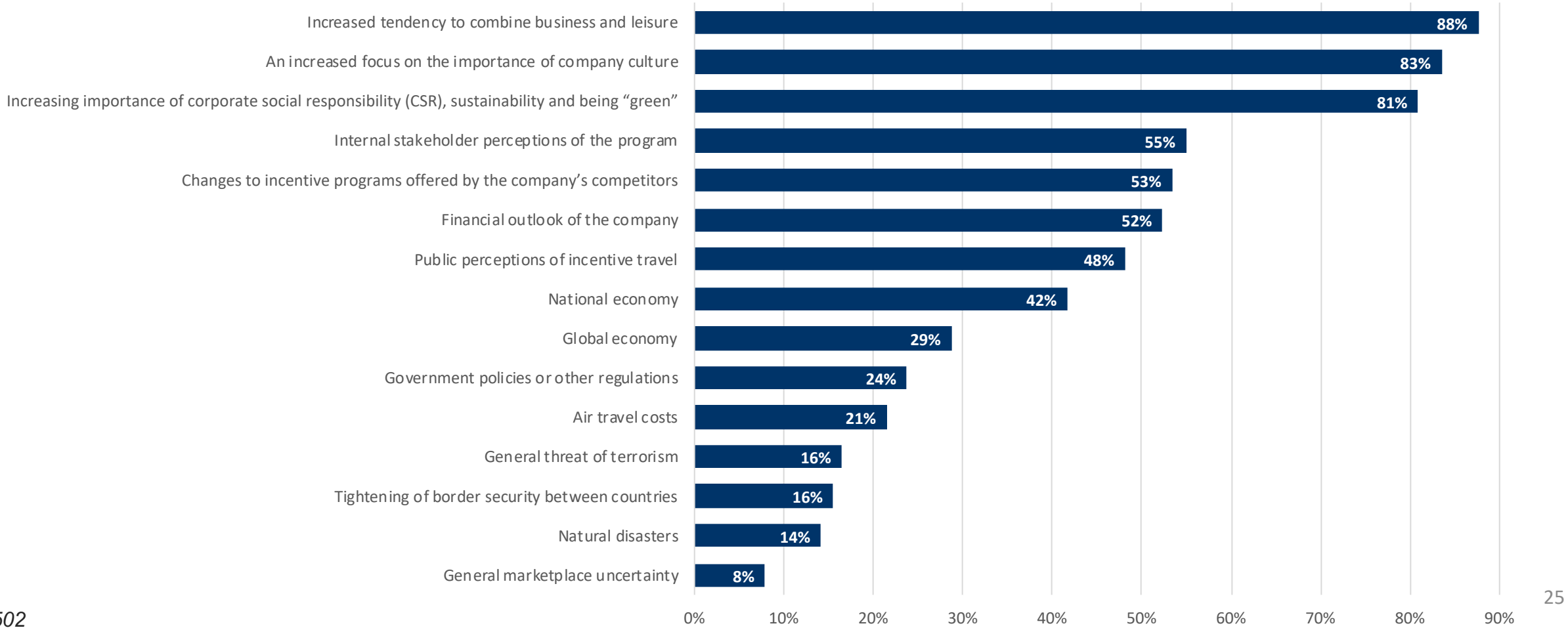
n= 546

G12. Which of the following factors are having the greatest positive and/or negative impact on your team's plans for incentive travel programs occurring over the next 2 years (2020 and 2021)? *Indicate the impact of the 3 most important factors.*



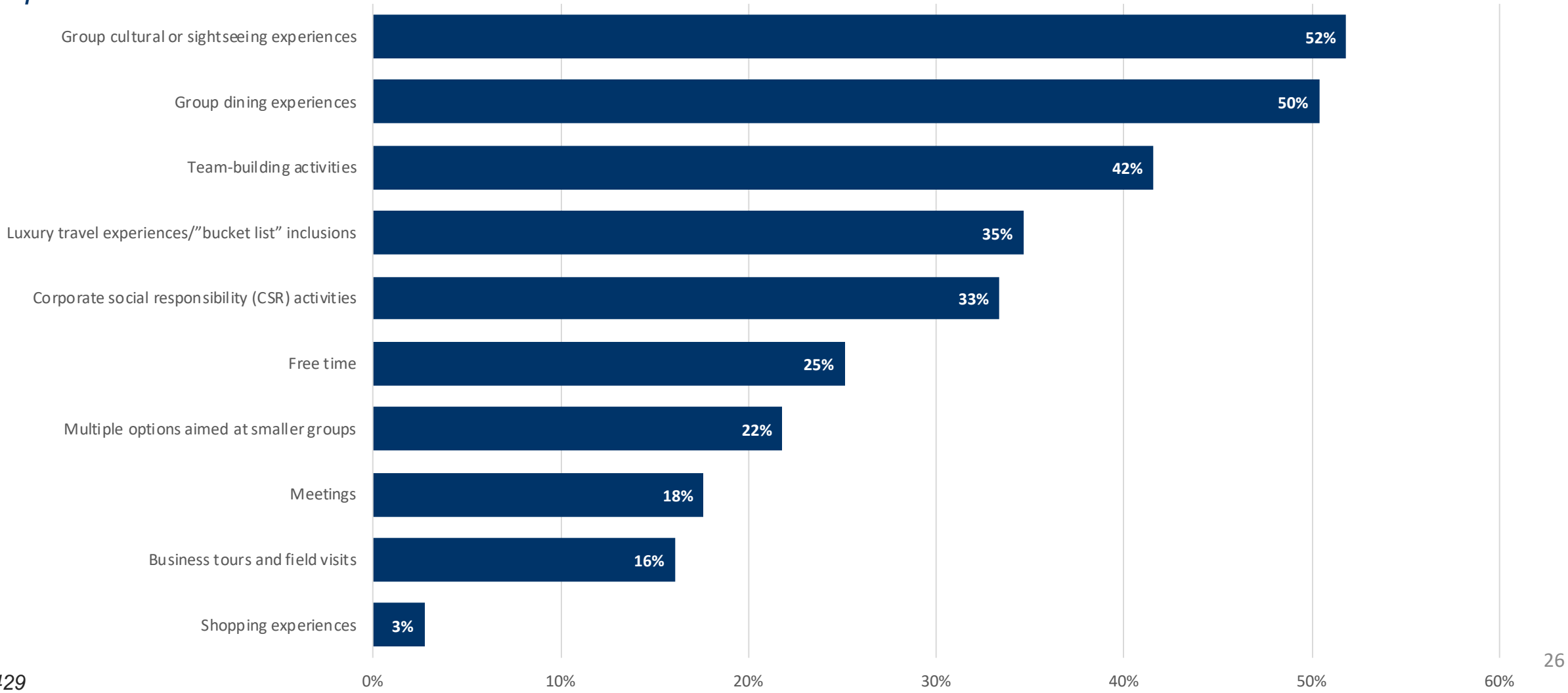
n= 1,502

G12. Which of the following factors are having the greatest positive and/or negative impact on your team's plans for incentive travel programs occurring over the next 2 years (2020 and 2021)? *Indicate the impact of the 3 most important factors. "Strong positive impact" and "Moderate positive impact" responses*



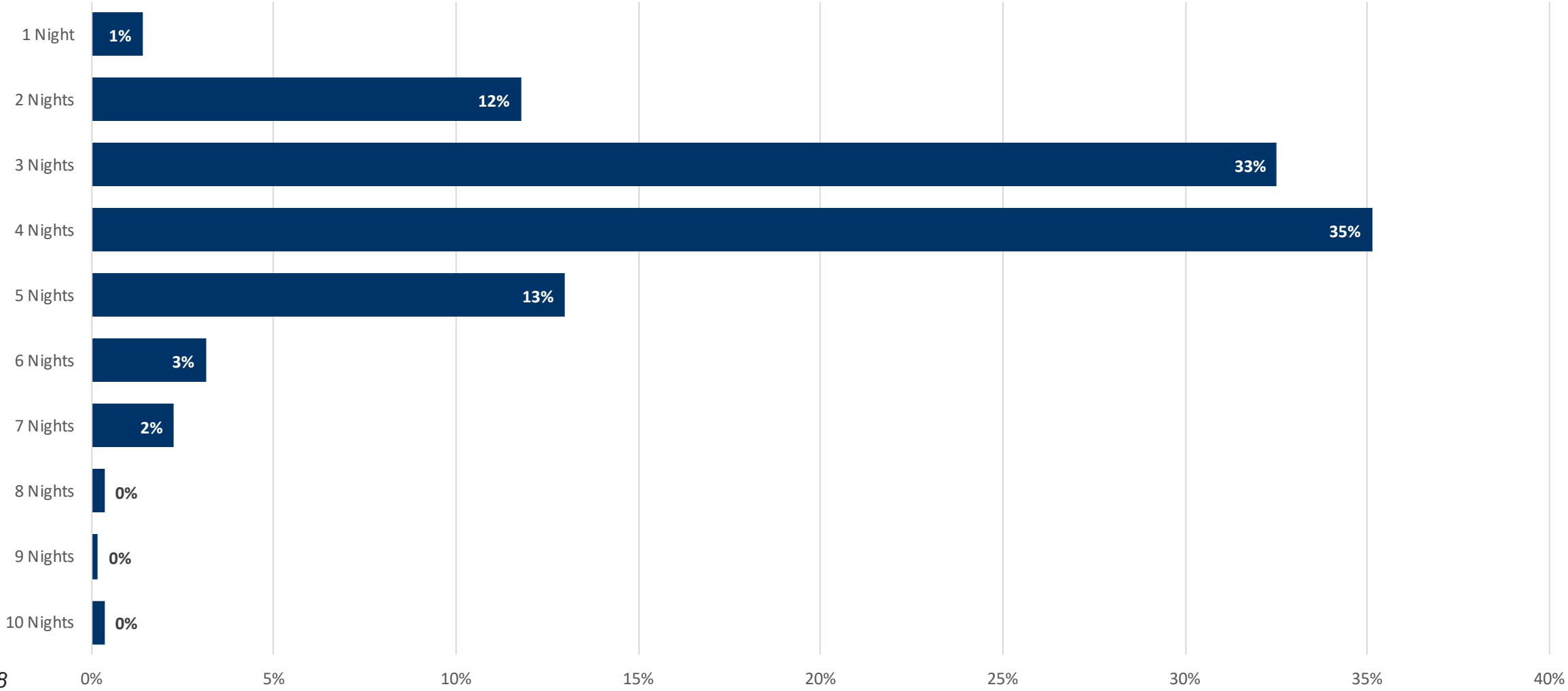
n= 1,502

P1.What activities do you consider most important for a successful incentive travel program? *Select up to 3.*



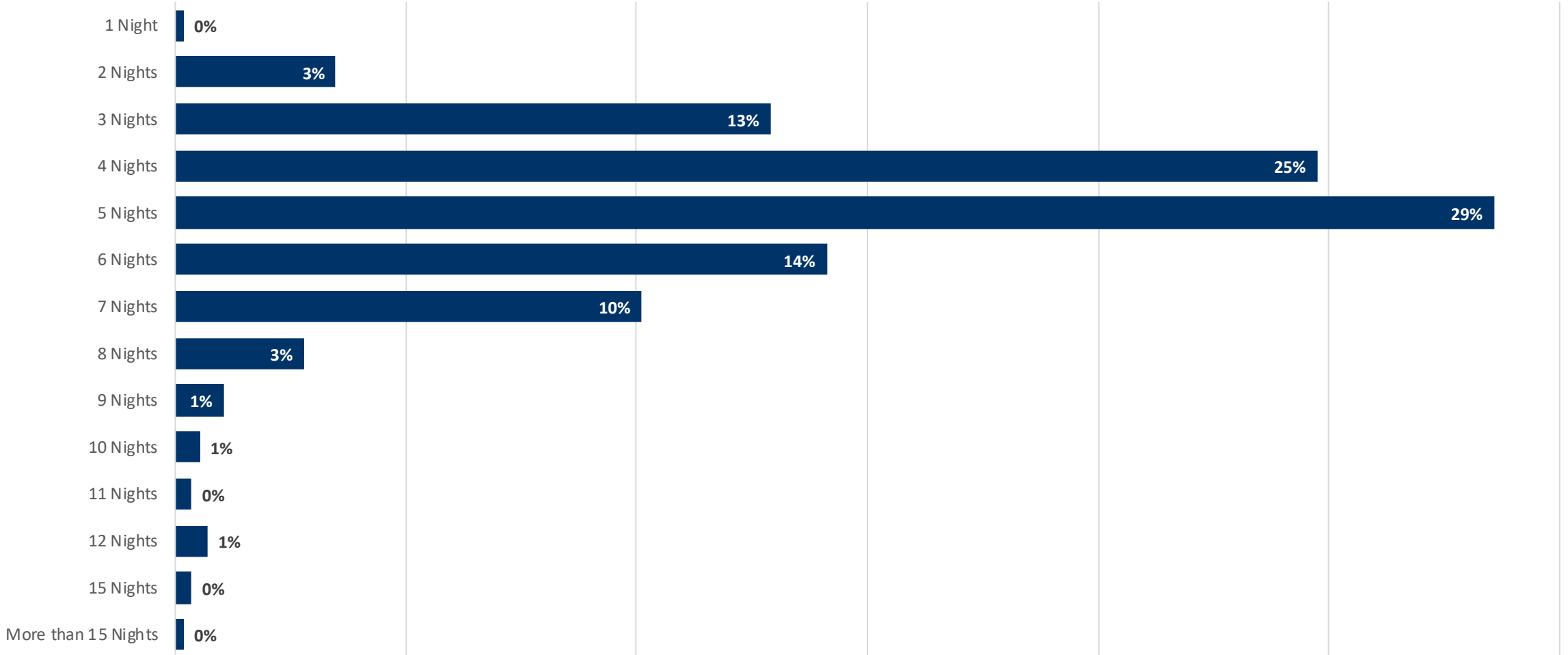
n= 1,429

P2. What is the usual length of stay for incentive travel programs occurring in the next 2 years (2020 and 2021) that require 4 hours or less of travel time (one way)?



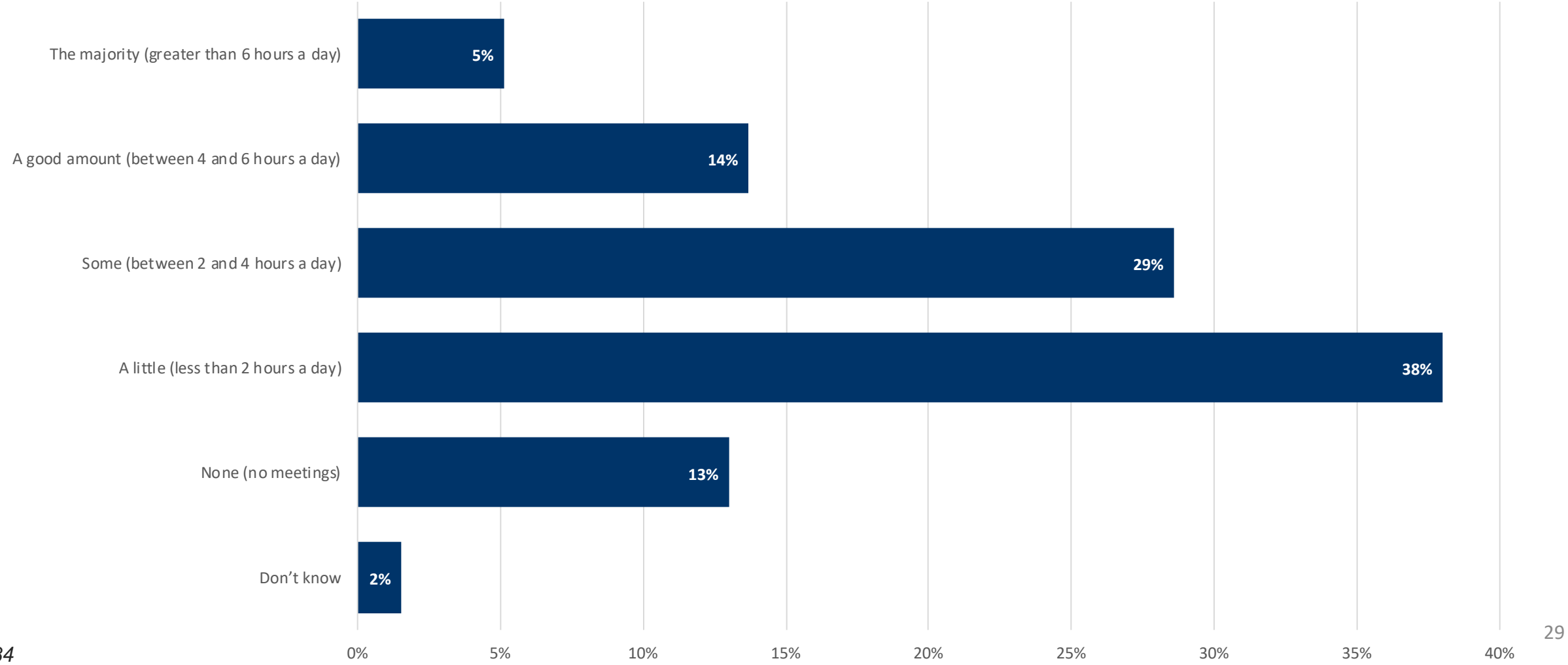
n= 578

P3. What is the usual length of stay for incentive travel programs occurring in the next 2 years (2020 and 2021) that require more than 4 hours of travel time (one way)?



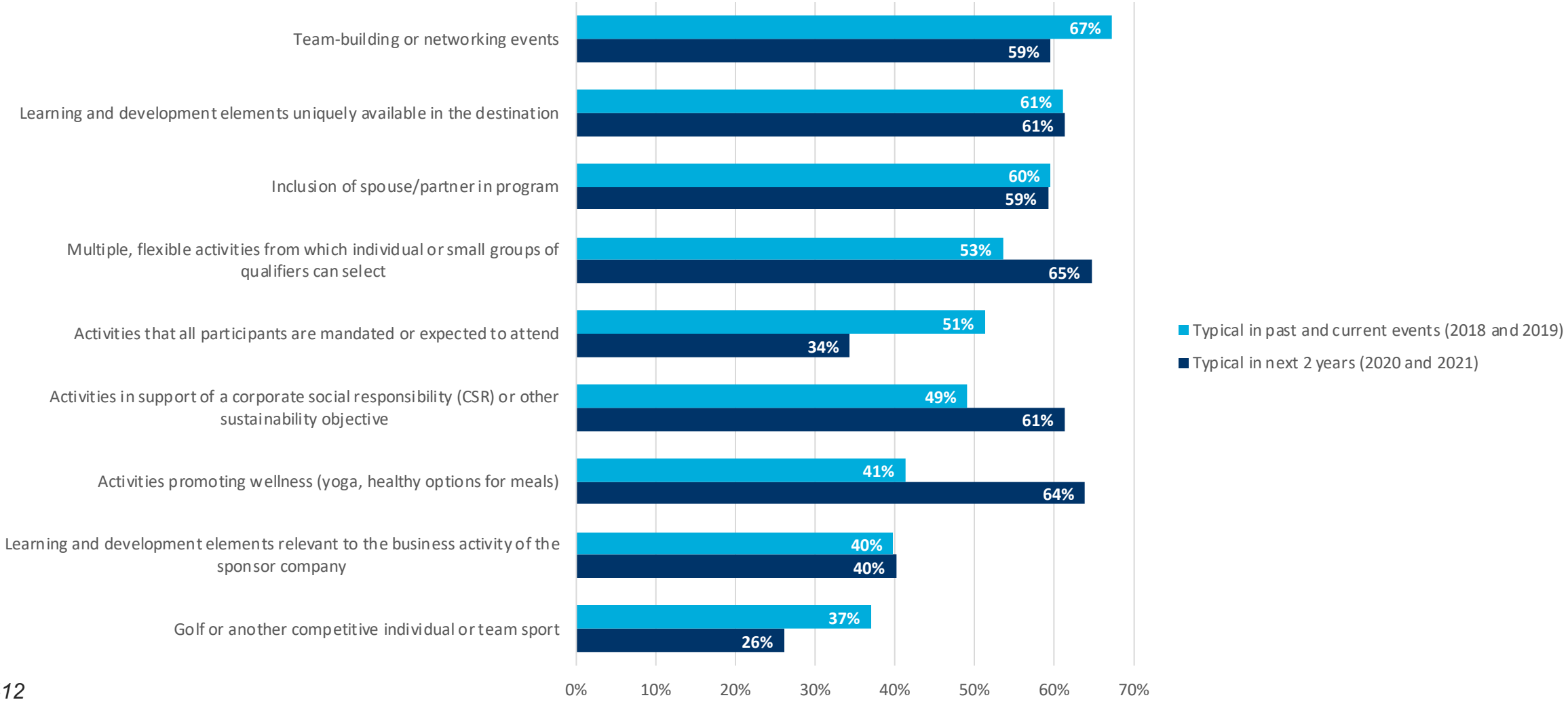
n= 574

P4. What amount of time on-site will be spent in meetings for programs occurring the next 2 years (2020 and 2021)?



n= 584

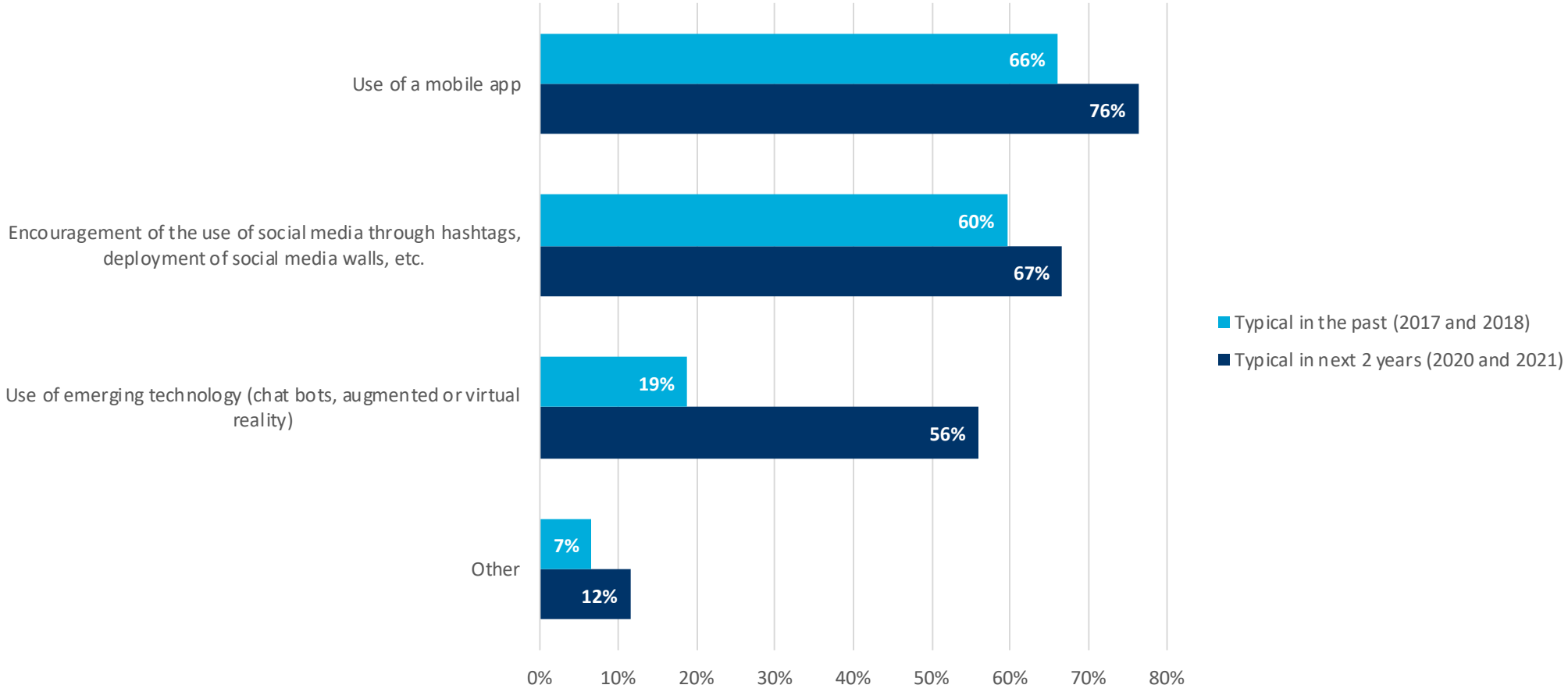
P5. Which program activities and inclusions have been typical in past and current events? What is expected to be typical in future events?



n= 1,412

P6. What technology and risk management steps have been typical in past and current events? What is expected to be typical in future events?

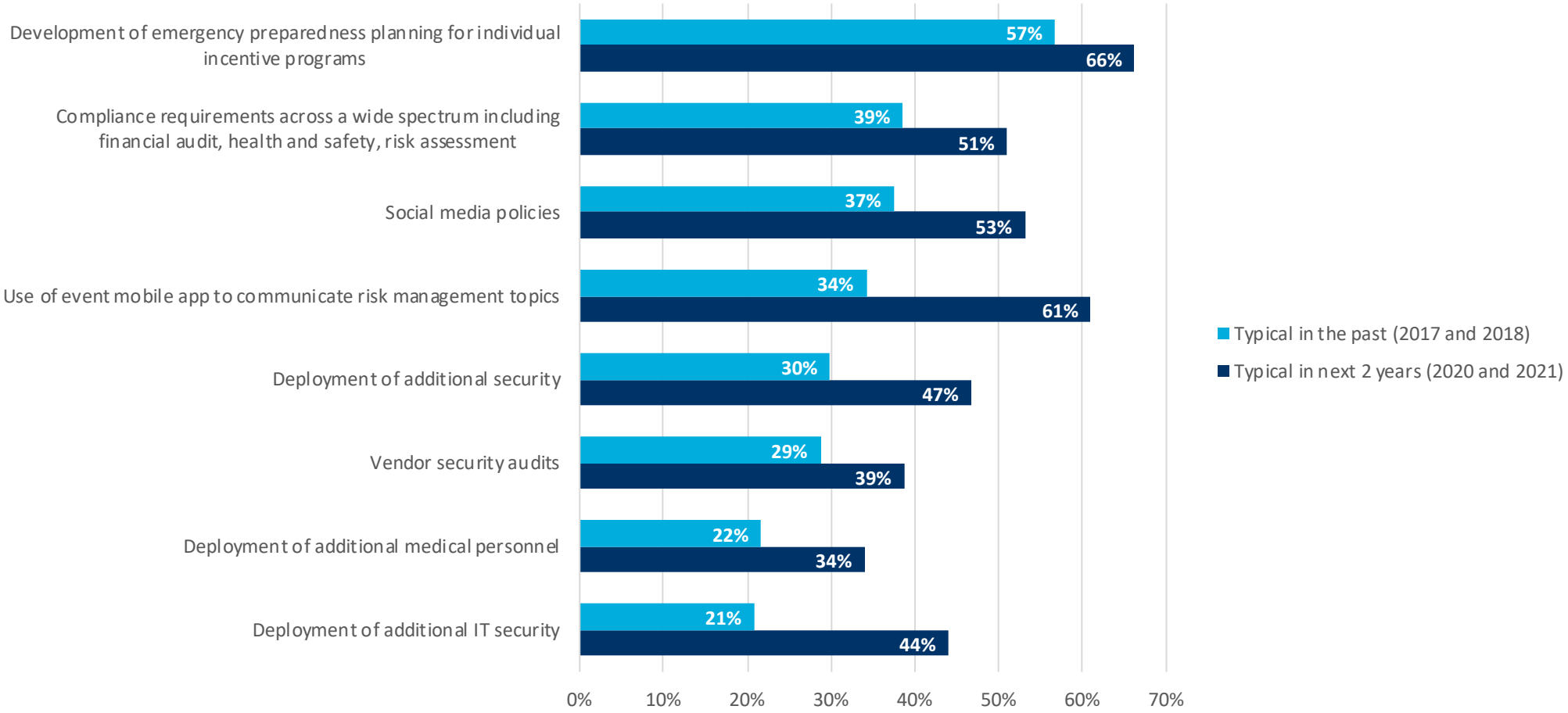
Technology



n= 1,398

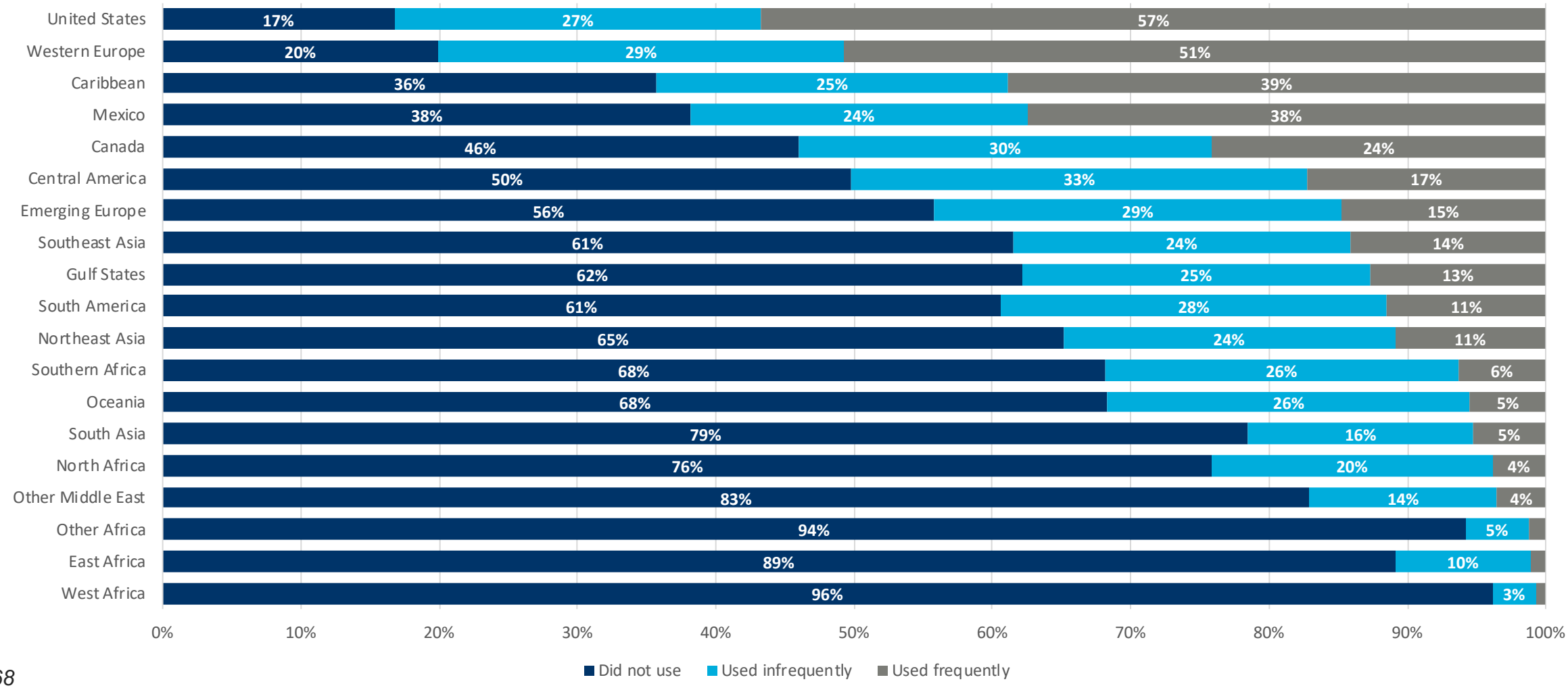
P6. What technology and risk management steps have been typical in past and current events? What is expected to be typical in future events?

Risk management



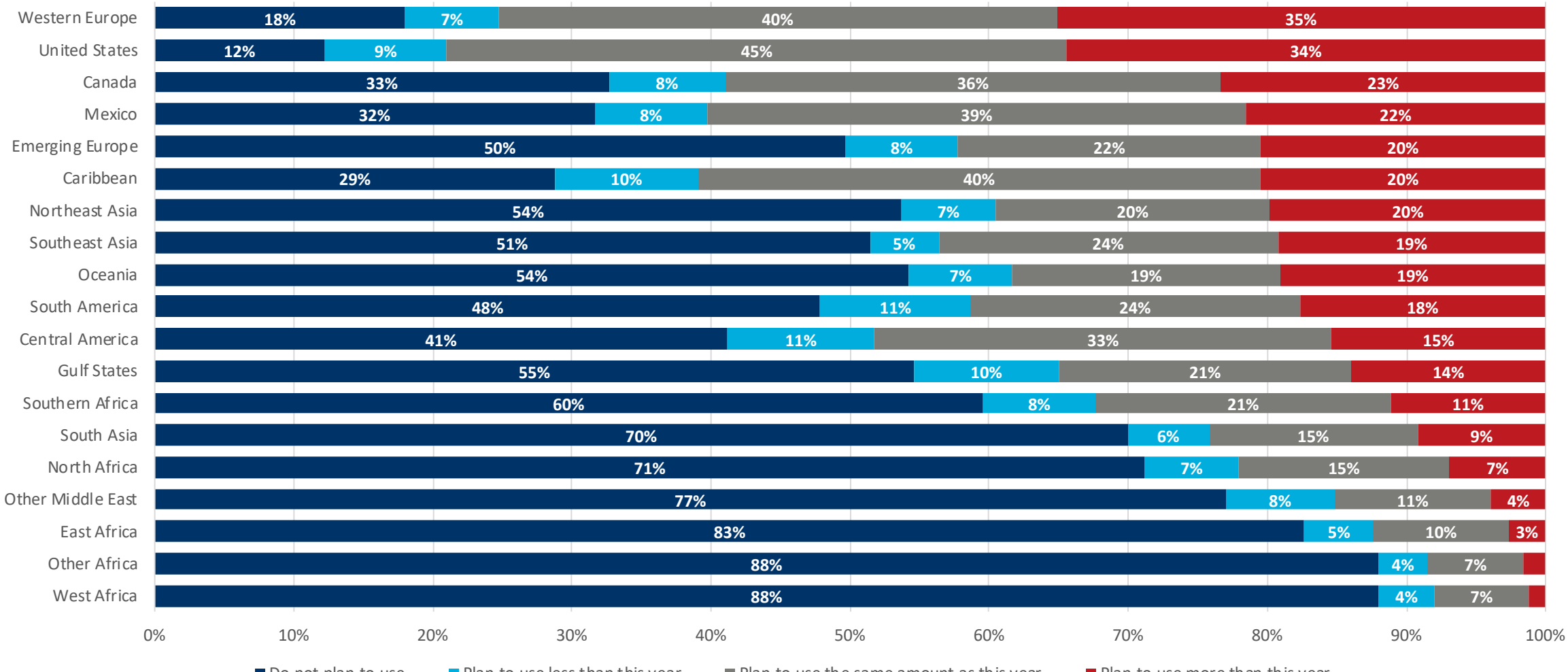
n= 1,398

VD1. Which destinations did your team use or plan to use for incentive travel programs that are occurring this year (2019)?



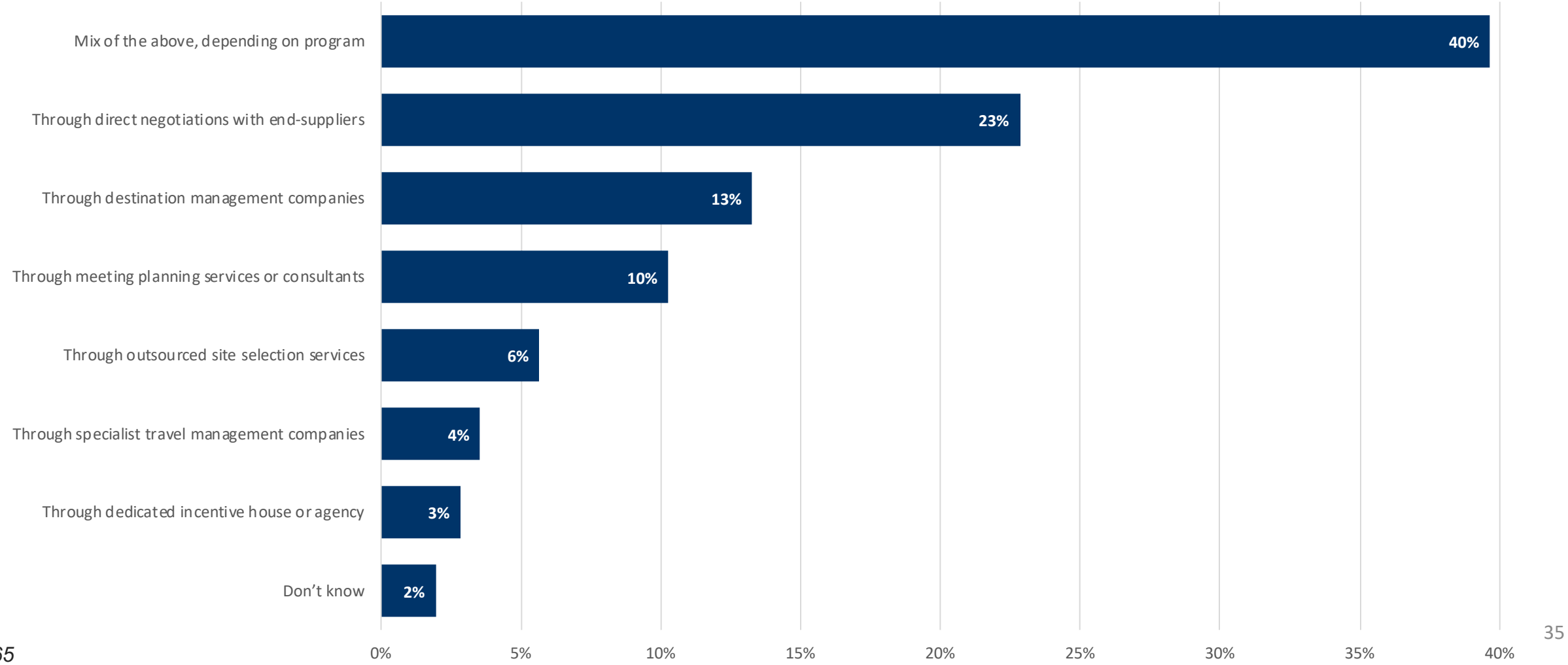
n= 568

VD2. Which destinations does your team plan to use for incentive travel programs occurring during the next 2 years (2020 and 2021), and how does that use compare to this year (2019)?



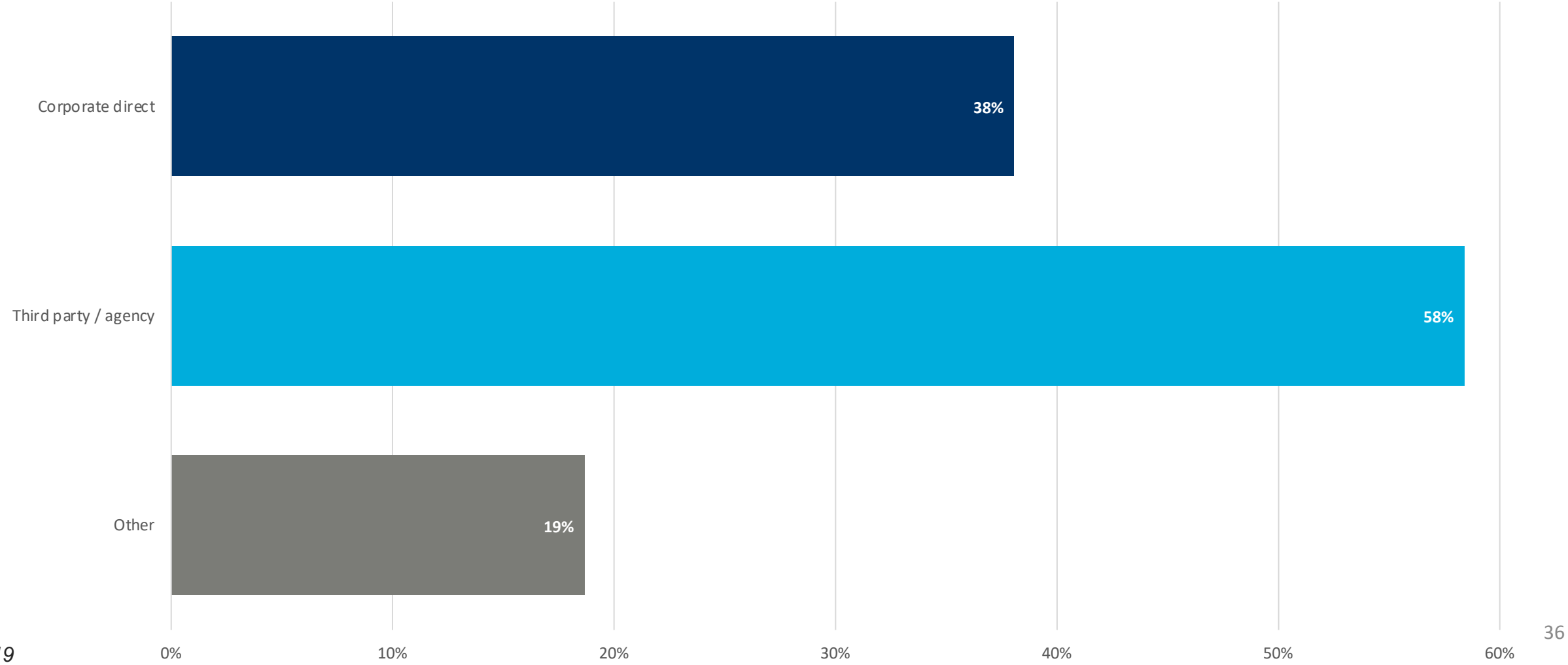
n= 566

VD3. How is your team contracting for, or planning to contract for, incentive travel programs occurring over the next 2 years (2020 and 2021)?



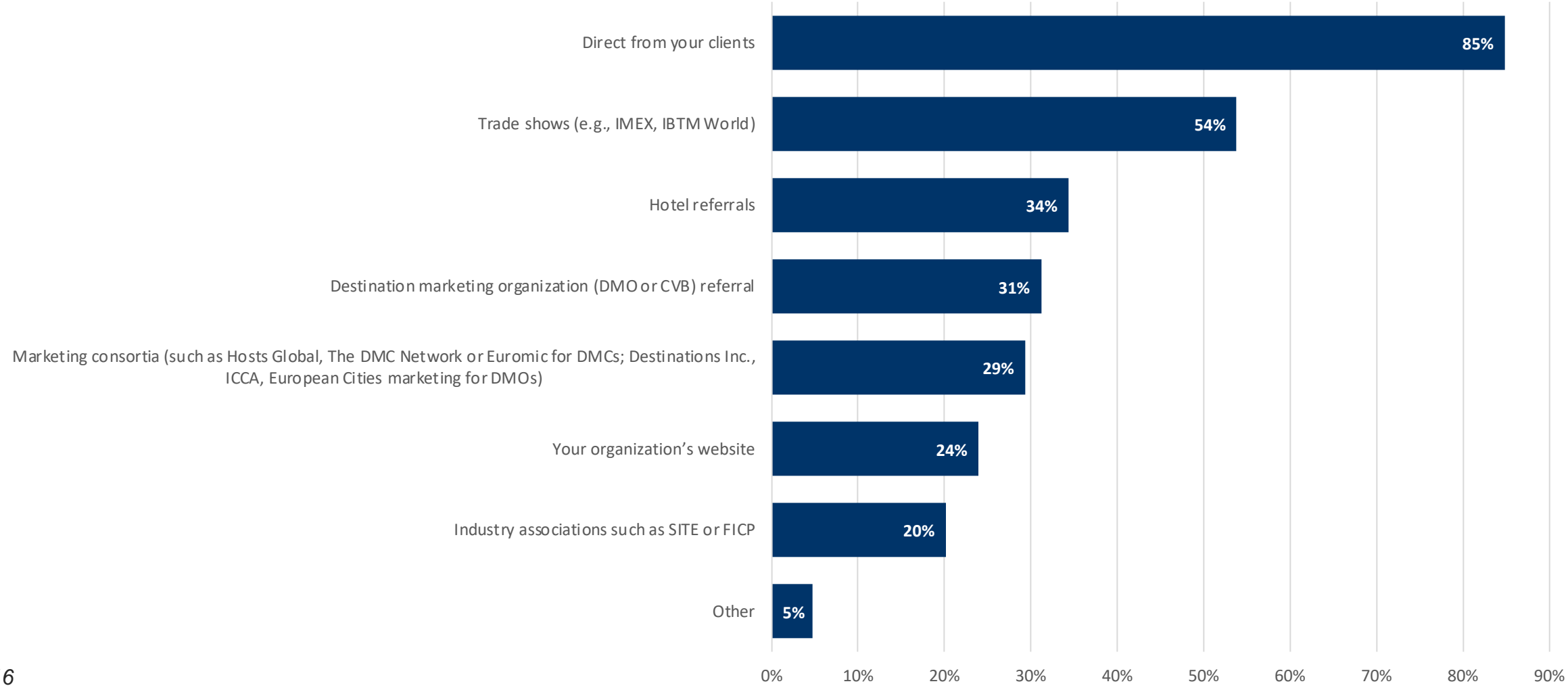
n= 565

VD4. For programs occurring during the next 2 years (2020 and 2021), what share of your team's business is generated by each type of client?



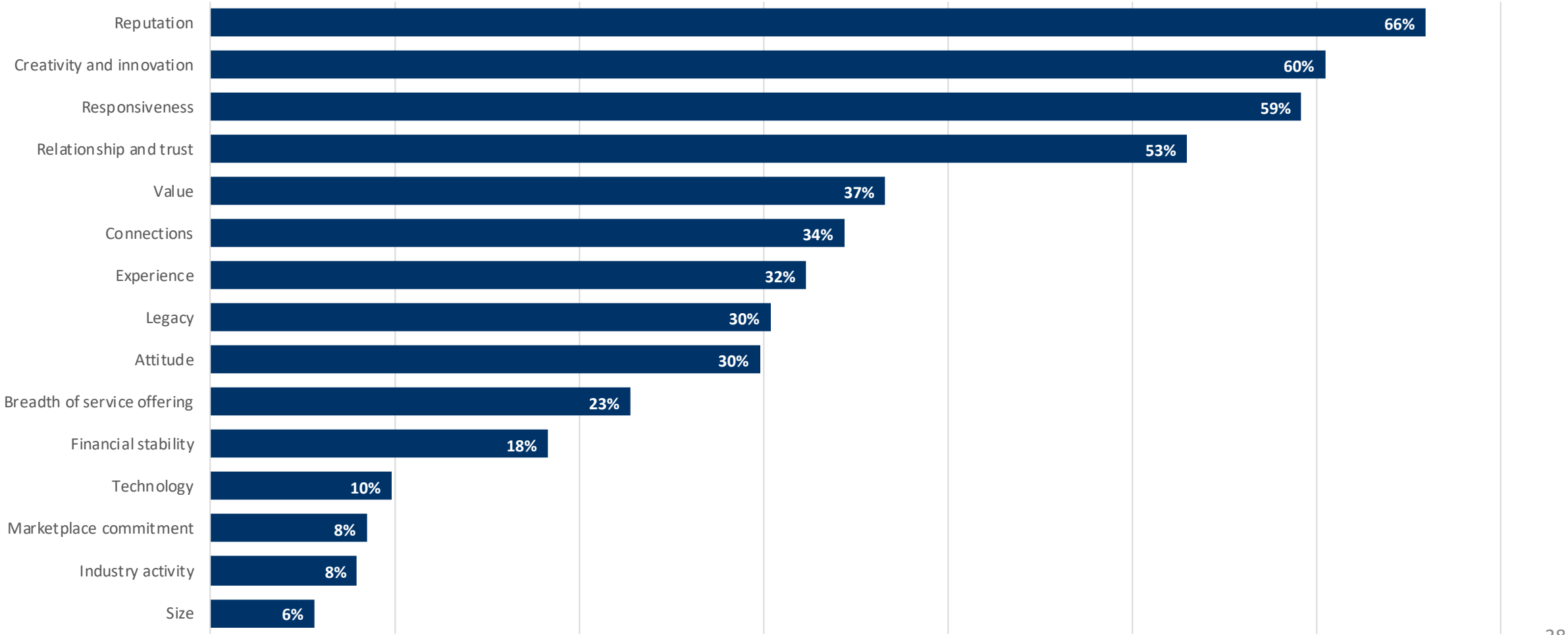
n= 819

VD5. Considering the origin of RFPs for the next 2 years (2020 and 2021), please indicate which sources are most important for your team (e.g., by number and quality of leads). *Select up to 3.*



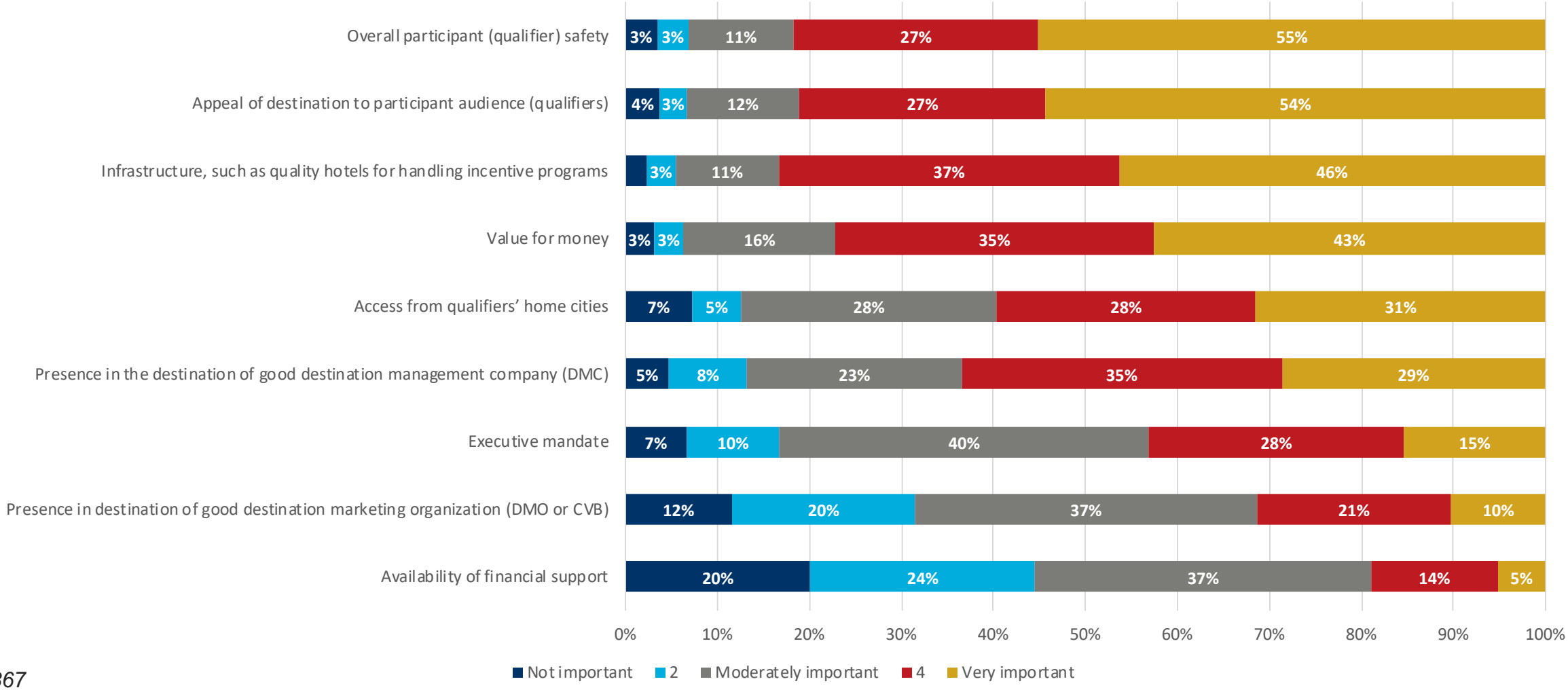
n= 816

VD6. What do your clients identify as the key factors that influence their choice of partner-suppliers, such as incentive houses, DMCs or other agencies? *Select up to 5.*



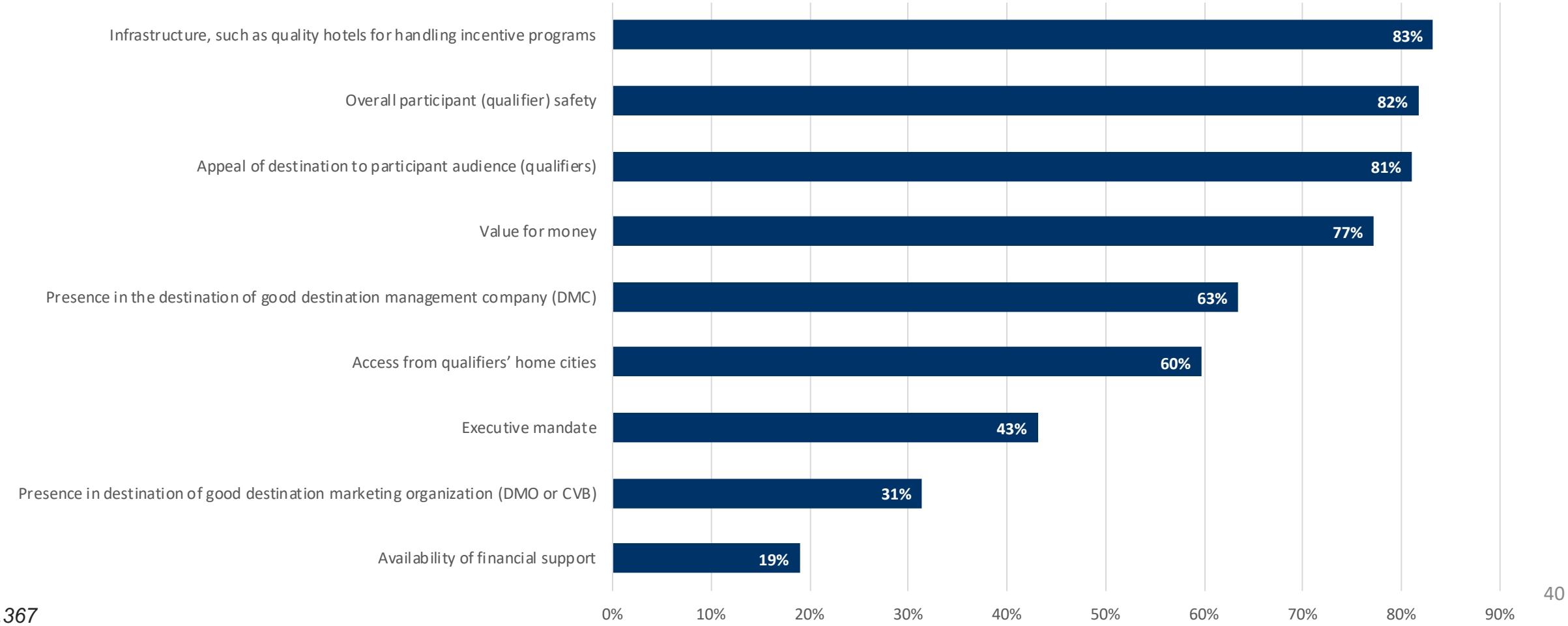
n= 1,027

VD7. What are the most important considerations in selecting a destination for incentive travel programs? Please answer based on your experience with these programs.



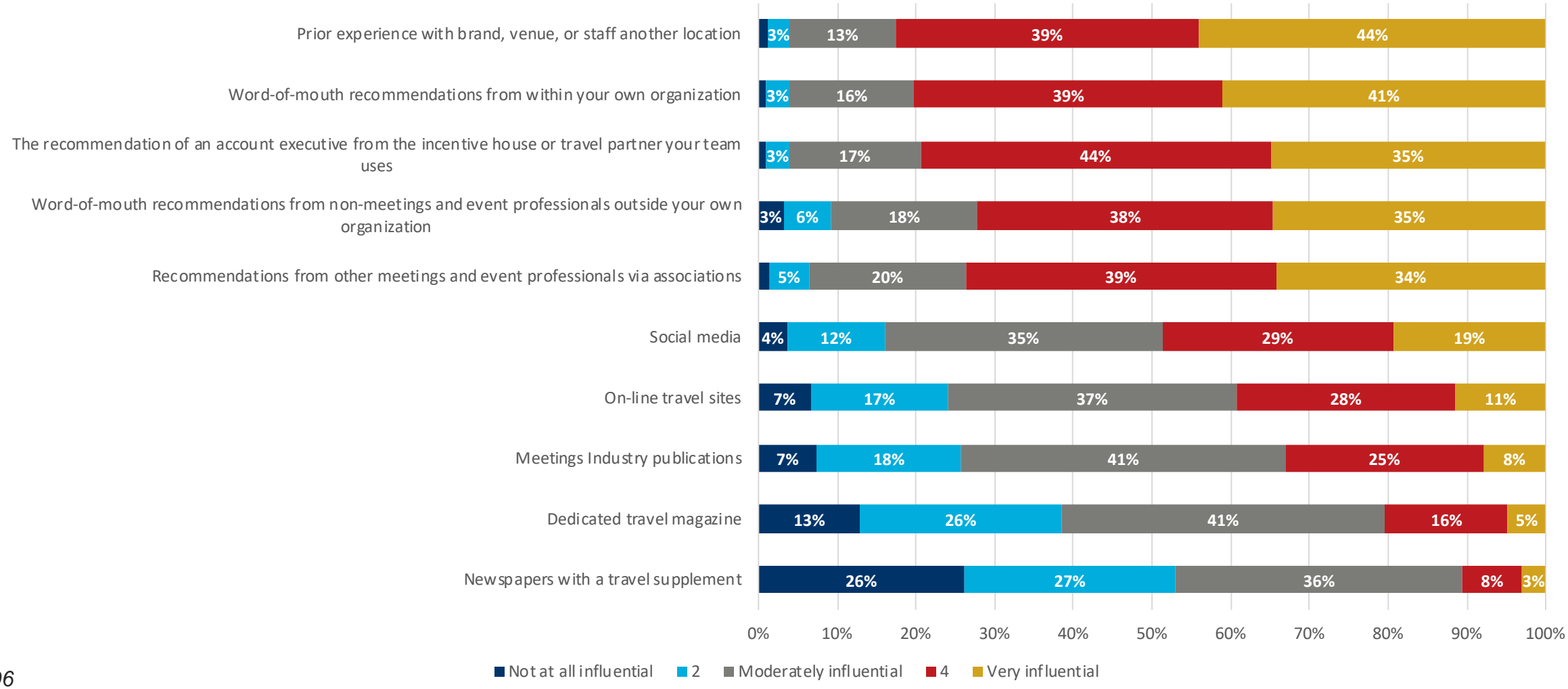
n= 1,367

VD7. What are the most important considerations in selecting a destination for incentive travel programs? Please answer based on your experience with these programs. *"Very important" and "Important" responses*



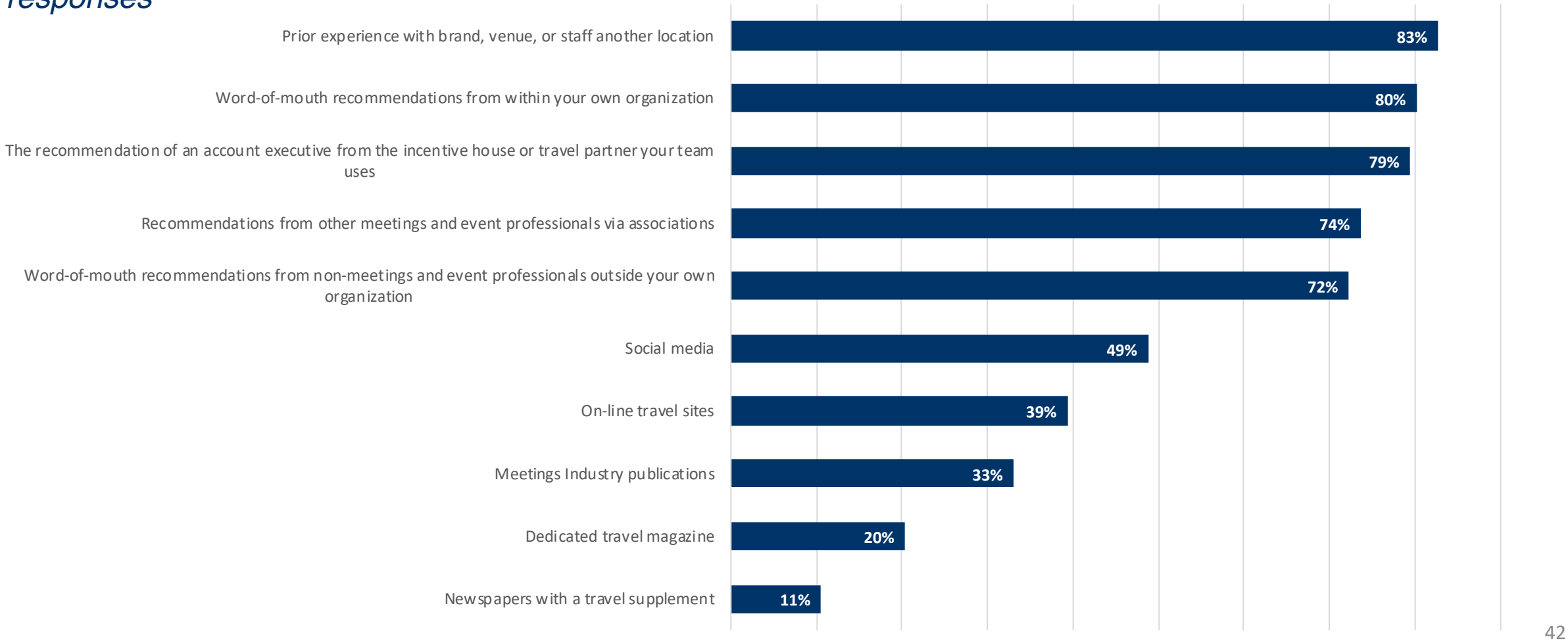
n= 1,367

VD8. Based on conversations with your clients, when they are selecting a new destination for an incentive travel experience, how influential are the following factors?



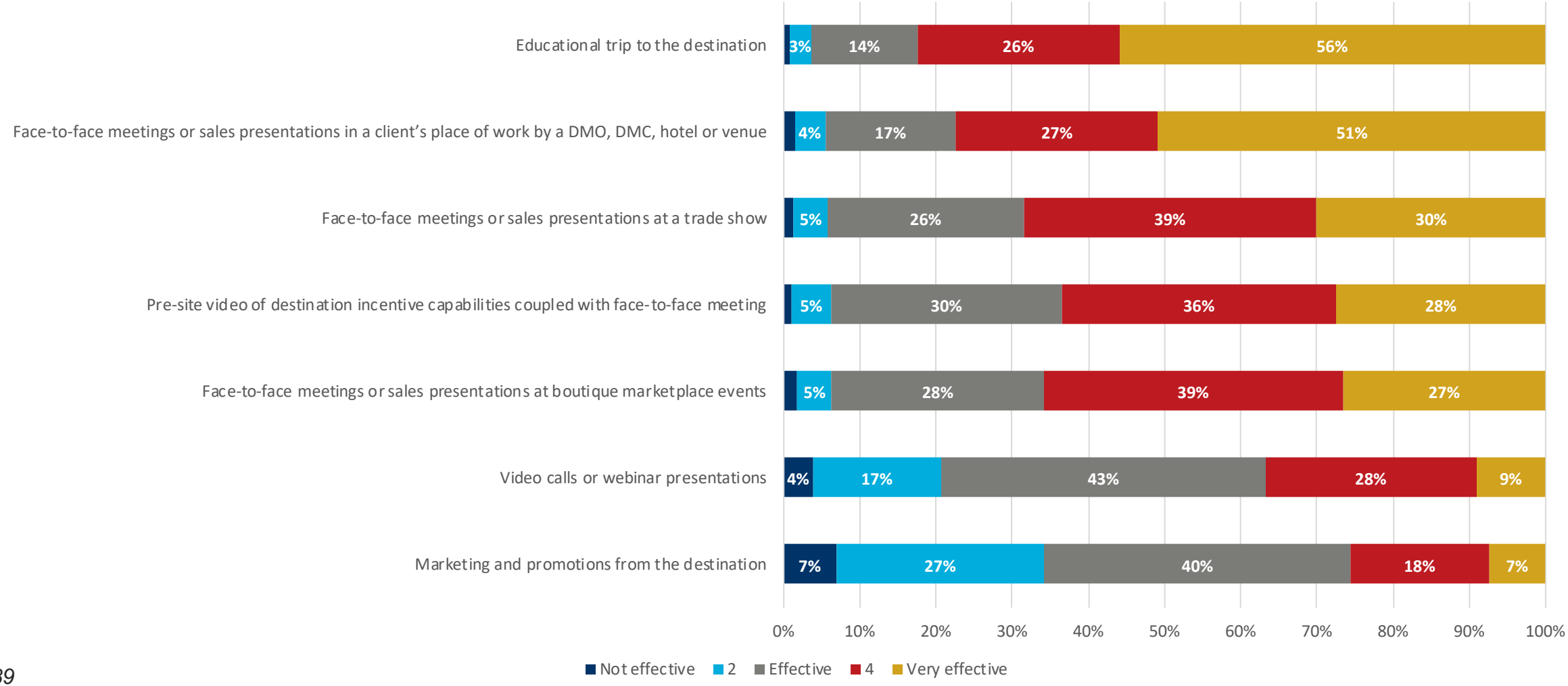
n= 796

VD8. Based on conversations with your clients, when they are selecting a new destination for an incentive travel experience, how influential are the following factors? *"Very influential" and "Influential" responses*



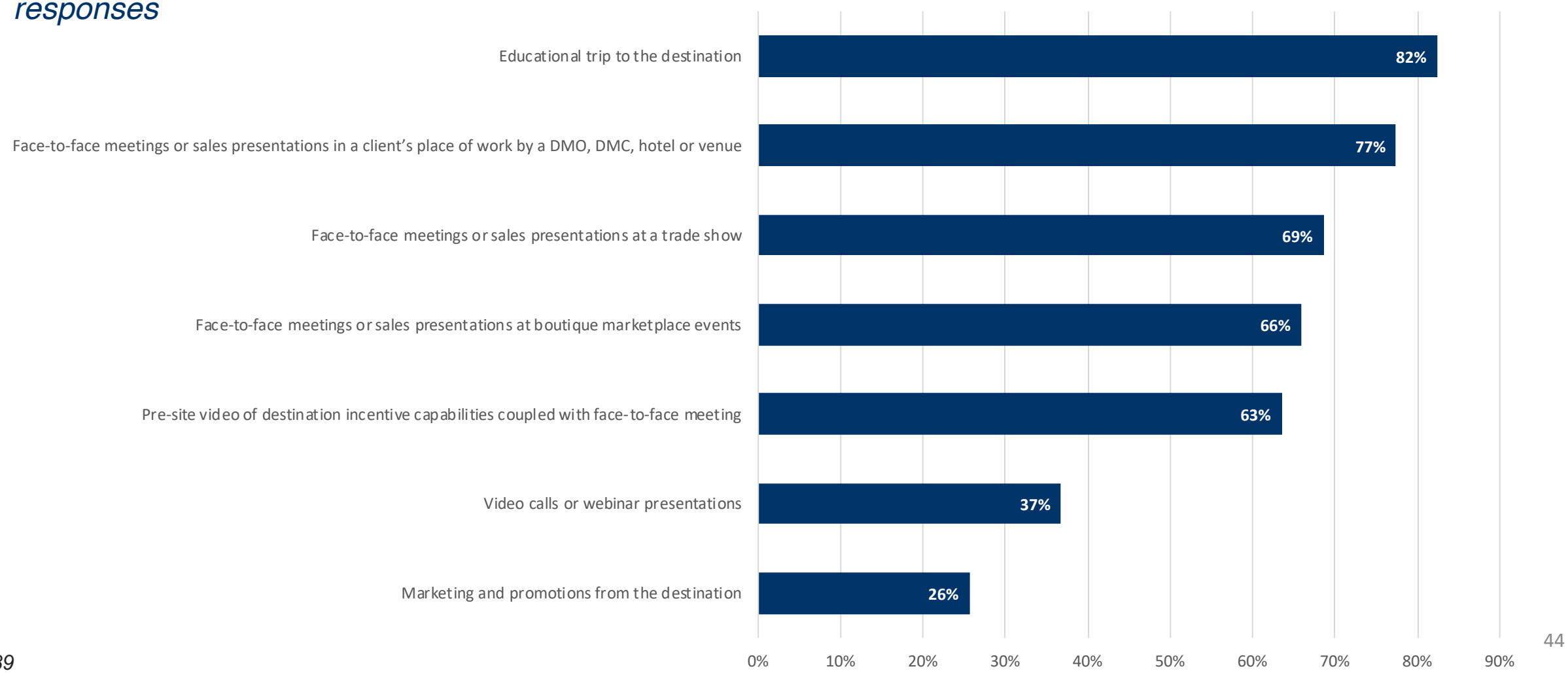
n= 796

VD9. Based on conversations with your clients, when they are learning about new destinations for incentive travel, how effective are the following outreach methods?



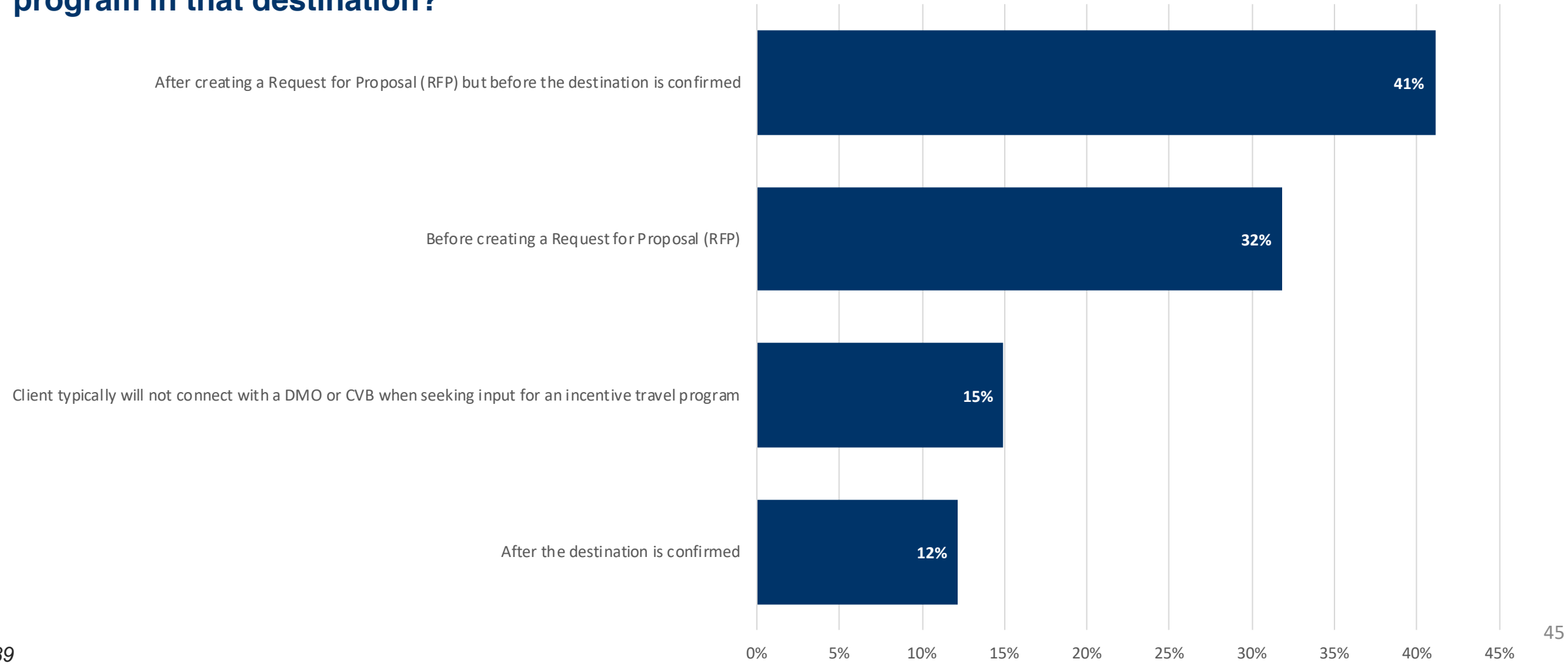
n= 789

VD9. Based on conversations with your clients, when they are learning about new destinations for incentive travel, how effective are the following outreach methods? *"Very effective" and "Effective" responses*



n= 789

VD10. Based on your experience, at what stage does an incentive travel program organizer typically approach a destination marketing organization (DMO or CVB) to seek advice about operating a program in that destination?

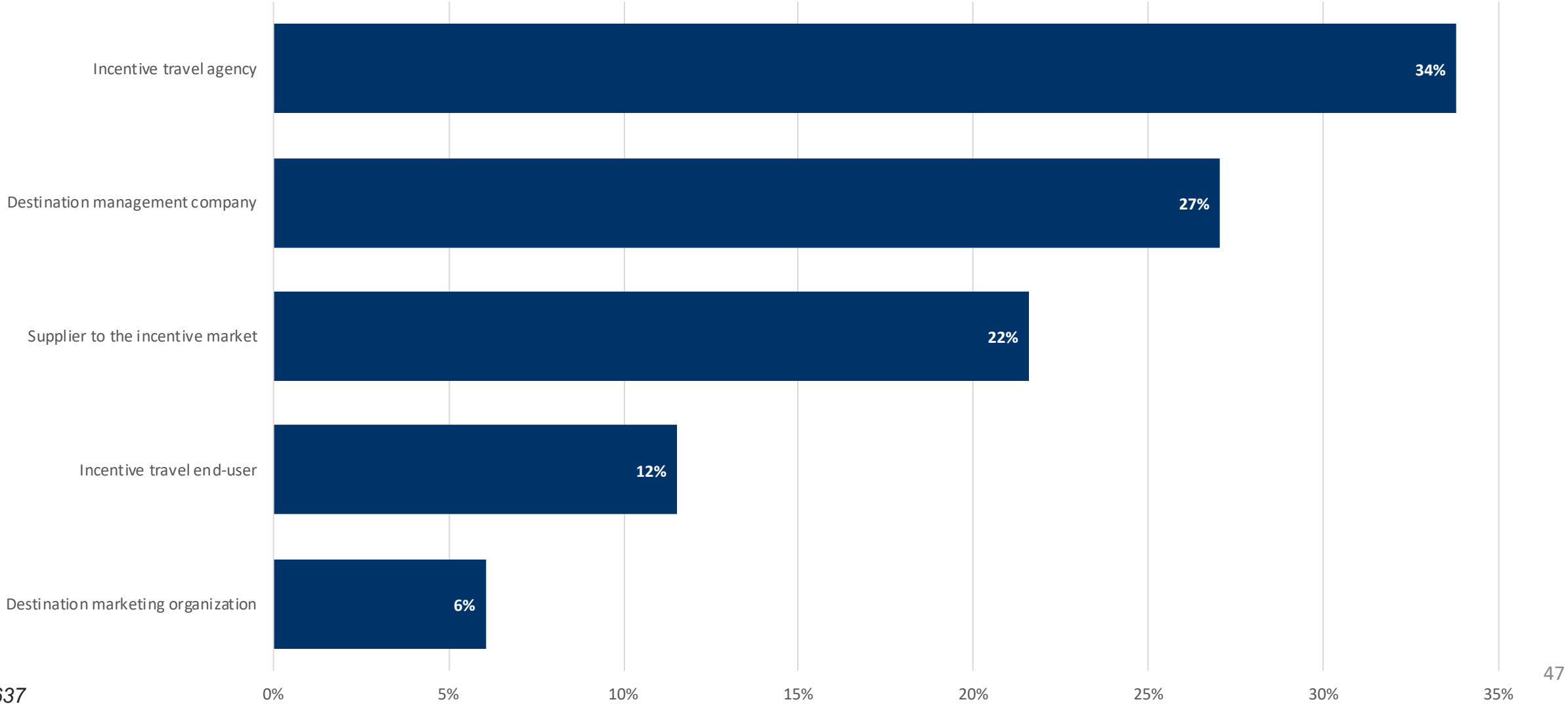


n= 789

Survey demographics

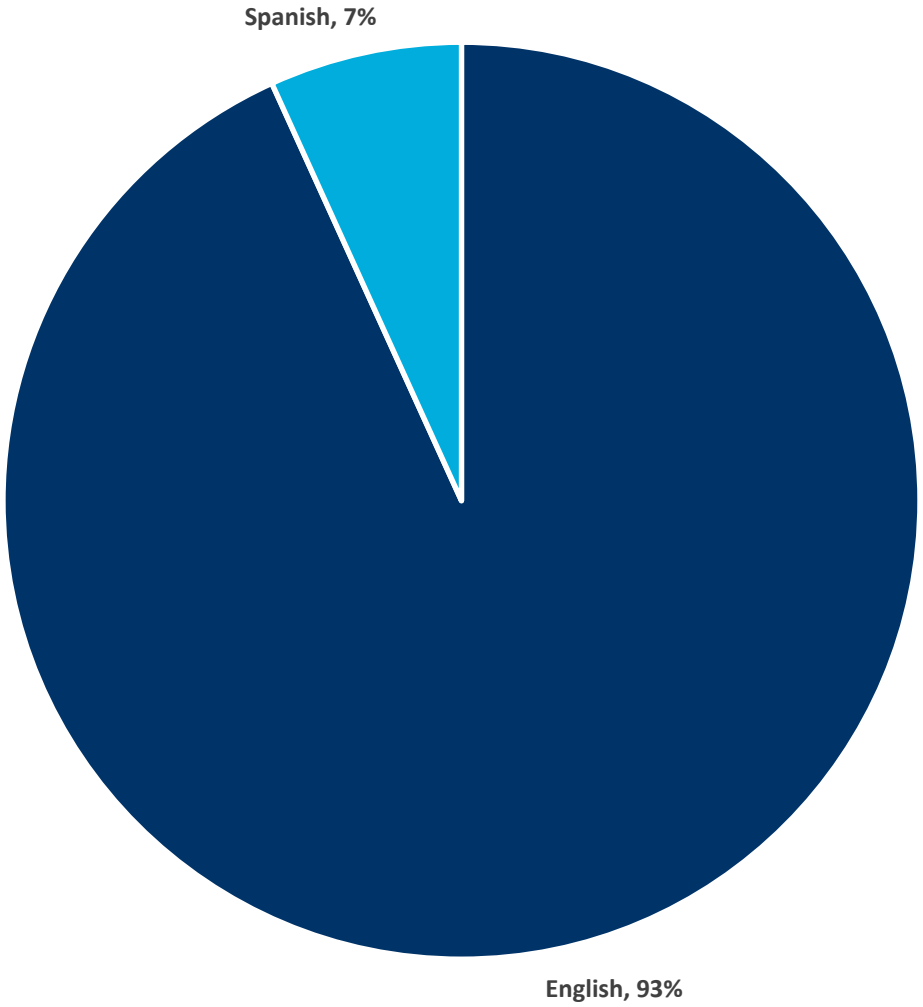
OXFORD ECONOMICS

I1. Please select the role that best describes your involvement in incentive travel



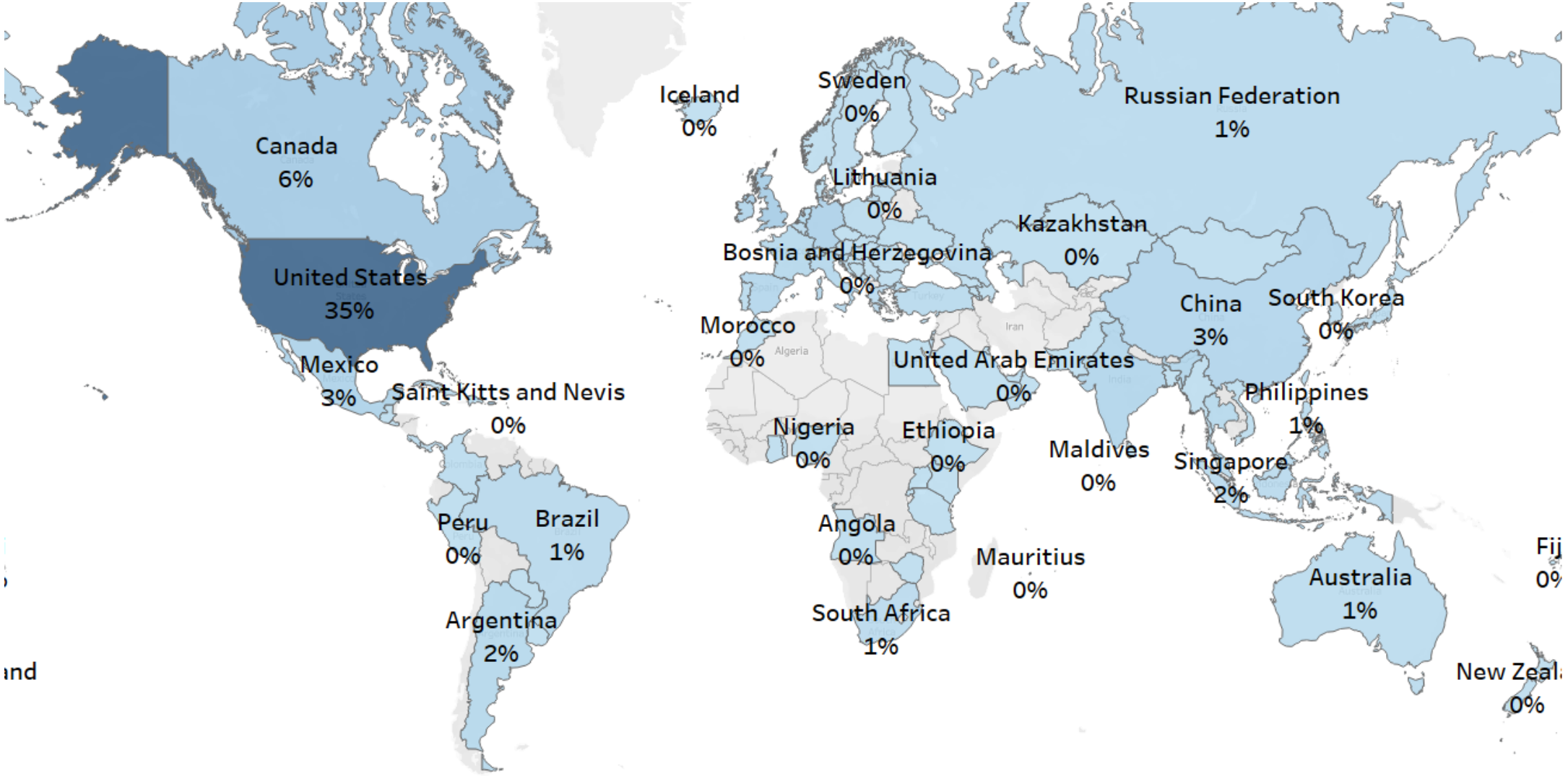
n= 2,637

I2. In what language would you like to take the survey?



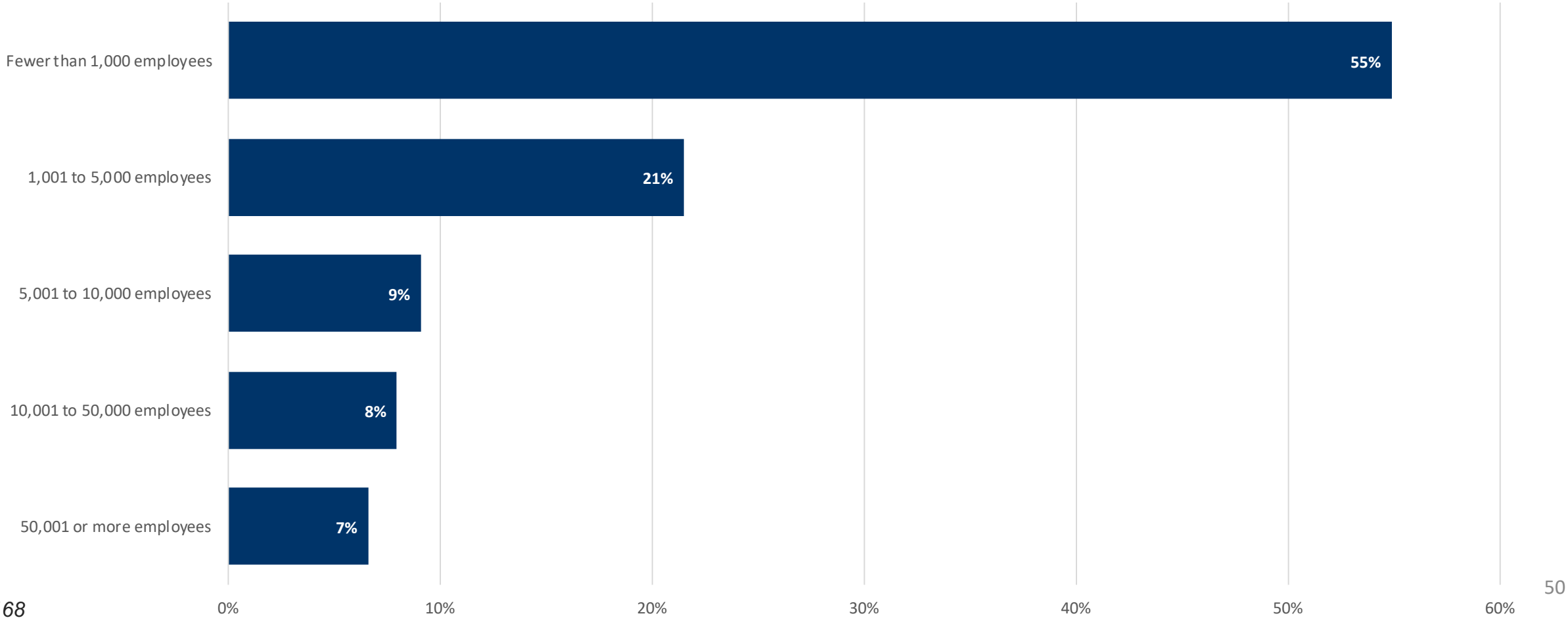
n= 2,637

I3. In which country is the organization for which you work based?



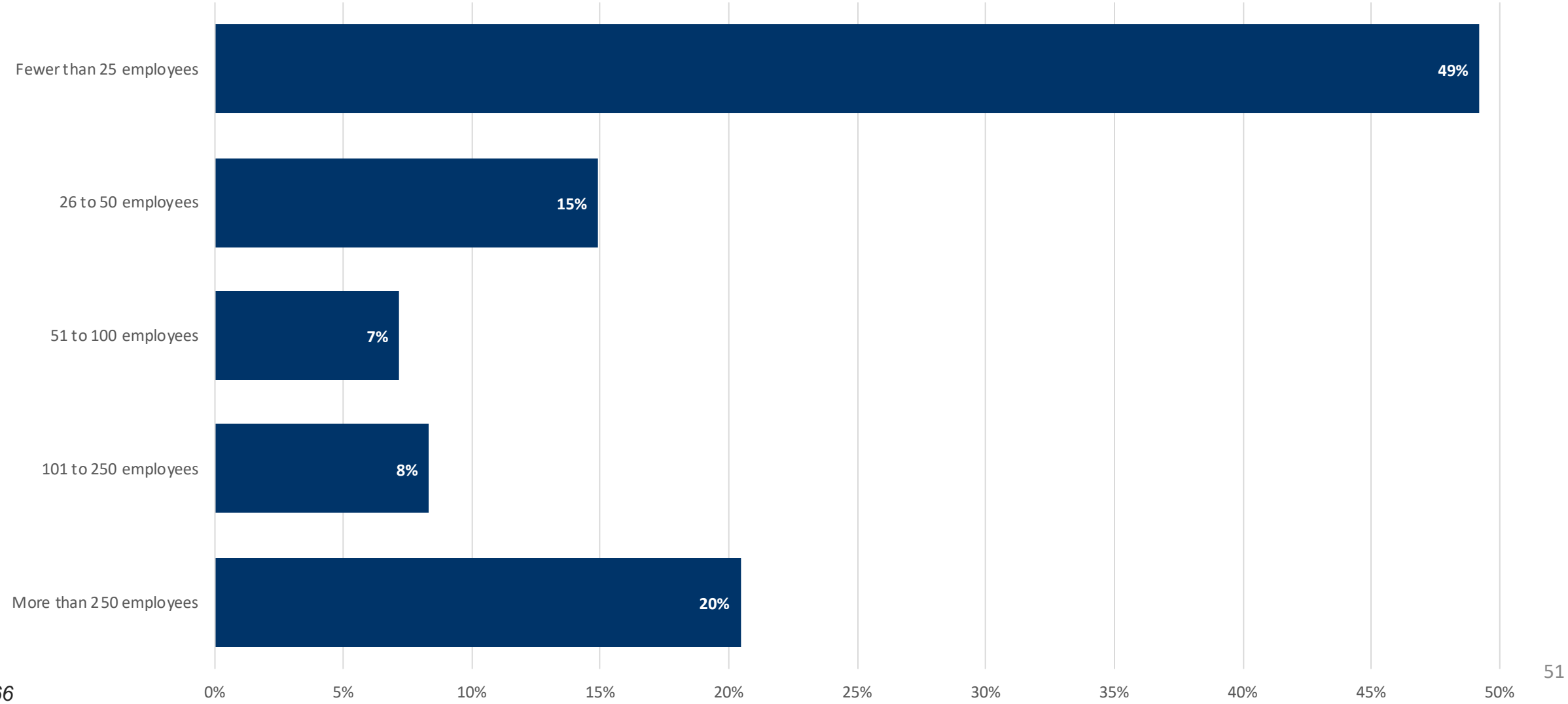
n= 2,637

I4. Which of the following best describes the size of the company for which your team is organizing incentive travel programs (i.e., the size of the parent company, all employees)? Incentive travel agencies should answer from the perspective of their typical client companies.



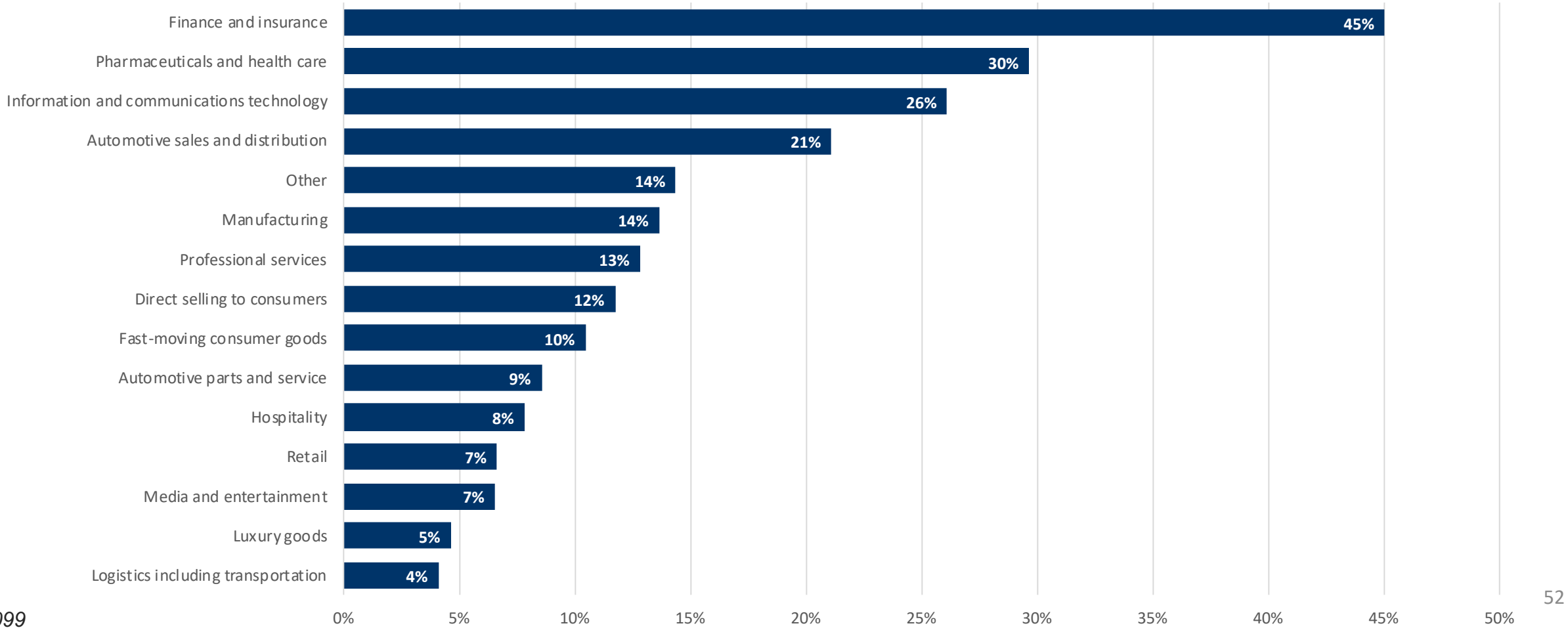
n= 1,168

I4a. Which of the following best describes the size of your company?



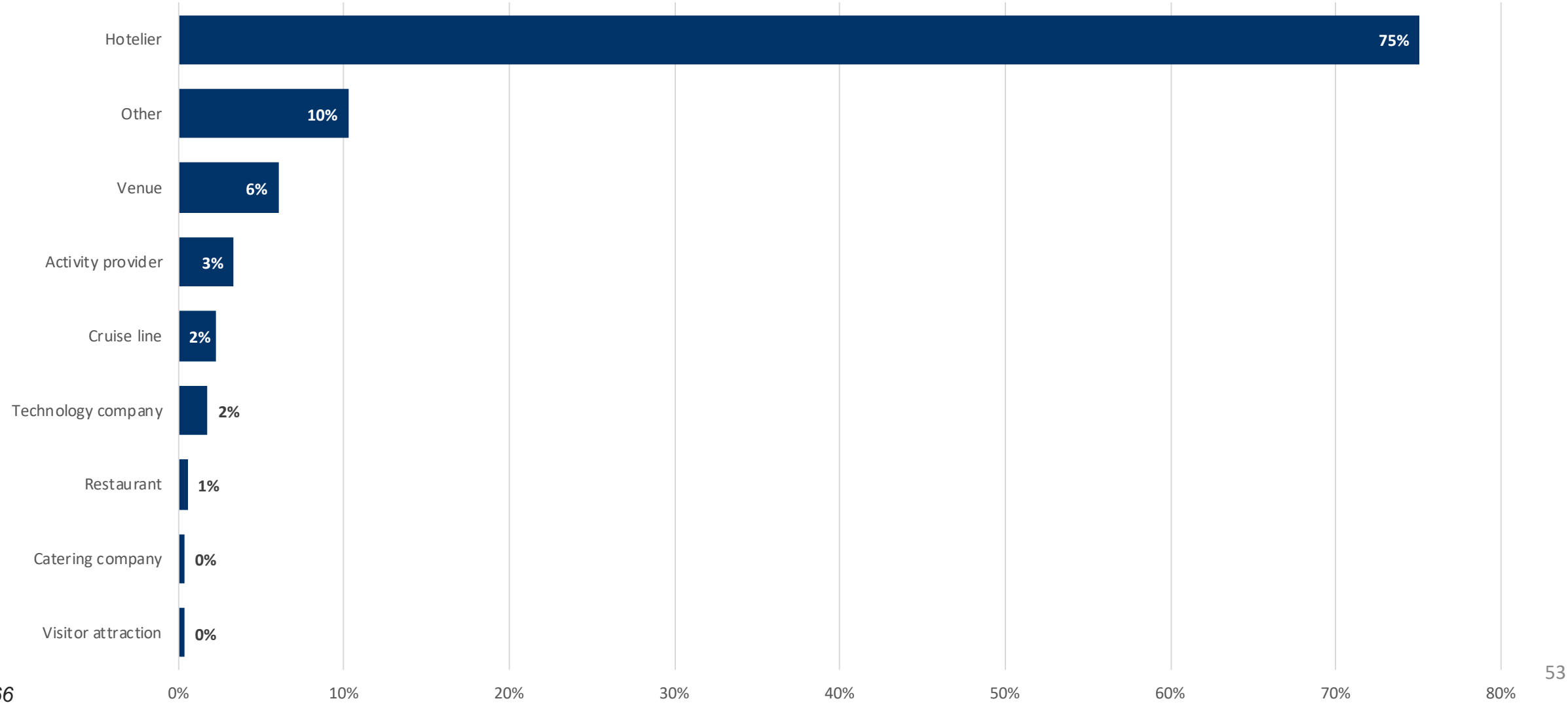
n= 866

I5. Which of the following best describes the industry for which your team is organizing incentive travel programs (i.e., the industry of the company or business units using incentive travel)? Incentive travel agencies should indicate the client industry they work with most frequently.



n= 1,099

I6. Which of the following best describes the company for which you work?



n= 566