



Executive Summary

This Site Index survey addresses current and future use of technology in the motivational events industry. The importance of technology in this industry is eminently clear and its importance continues to grow; less than 8% of respondents said they were satisfied with their level of technology. Approximately 44% of investment is made in response to the market—either direct demand from clients (19%) or based on new product development (25%). 28% want more technology but are restrained by the lack of funds—not surprising in these economic times. The startling fact, and one that should demand our immediate attention, is that only 12.5% of respondents are planning ahead for their technology needs. When the results are reduced to provider companies only we find that a mere 9.6% are planning their acquisition of technology.

Almost everyone (98.5%) uses electronic mail and 43.1% use social media; however, other forms of data transfer like public FTPs, blogs, online groups, and electronic data interchange are less utilized.

Most respondents (78.1%) believe that technology has increased their personal work productivity by making tasks easier. However, this comes at the cost of a greater workload with 46.9% seeing more work and more stress (39.1%). The simplest conclusion is that as people's productivity increases, they are having more tasks added to their workload—or are taking more on themselves. It's also worth noting that 56.3% find their personal work simplified because of technology. The net result seems to be that people are doing more work and, while this creates more stress, technology is making it easier than they would have believed. Nevertheless, while technology is improving people's productivity and efficiency we cannot ignore the fact that it is also increasing workload and stress. Firms need to be careful to balance their use of technology with implementation of stress audits.

Virtual meeting use seems to be widespread (42%) and economically valuable with the majority of users (70.3%) believing that the technology can decrease event budgets. At the very least, they indicate there will not be an increase in costs through its use.

When asked about the importance of a company's available technology when selecting partners, it is evident that technology is becoming a much more important consideration with 91.1% deeming it somewhat important or important.

Respondents were asked to choose the frequency with which technology is used in various stages of a program and to determine the changes in the usage of technology in each

phase. During *Program Marketing*, websites are used by approximately half of participants with the majority of respondents saying that usage is increasing. Trip websites are used in approximately the same frequency as program websites. (See *Program Marketing* chart).

Similarly to Program websites, email communication during *Program Marketing* is used by only half of the respondents; however, the majority state that its use is increasing. Video communication is infrequently used and is not believed to be increasing as rapidly as other technologies. This may be due to cost or other logistical problems.

On-line results tracking is infrequently used and not expected to increase in the future. It is highly surprising that more companies are not planning to use online results tracking. There may be some fear that competitors can access this data but security measures can be used to eliminate all but a participant from sharing it. As an added security measure, only personalized, password-protected results tracking should be used.

During *Pre-Program Logistics*, participants reported using technology at a much lower rate than for program marketing. Even though usage is low, participants agree that it is increasing. This also suggests that applications for file transfer and sharing need to be simplified.

Responses show low use of technology during *Onsite Program Operation* although, again, it is increasing in all instances.

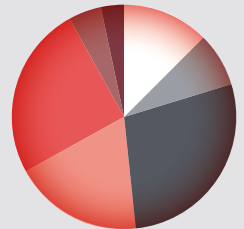
Finally, during *Post Program* a similar pattern is repeated with technology use rather low but increasing.

One indisputable finding of this survey is that the use of technology will increase in the motivational events industry in the near future.

Use of Technology, January 2010

Investment

Which statement comes closest to describing your organization's approach to investing in new technologies?



- We have an organized multi-year plan 12.5%
- We are currently satisfied with our level of technology 7.8%
- We invest in upgrades as we have funds available 28.1%
- We invest as new demands develop from our clients 18.8%
- We invest as we offer new products and services 25%
- We experiment with lots of new ideas and hope that clients will be attracted to them 4.7%
- Other 3.1%

Observations

This survey suggests that the greatest area for technology growth in the motivational events industry rests with cross-organizational collaboration using resources such as interactive online groups and social media tools.

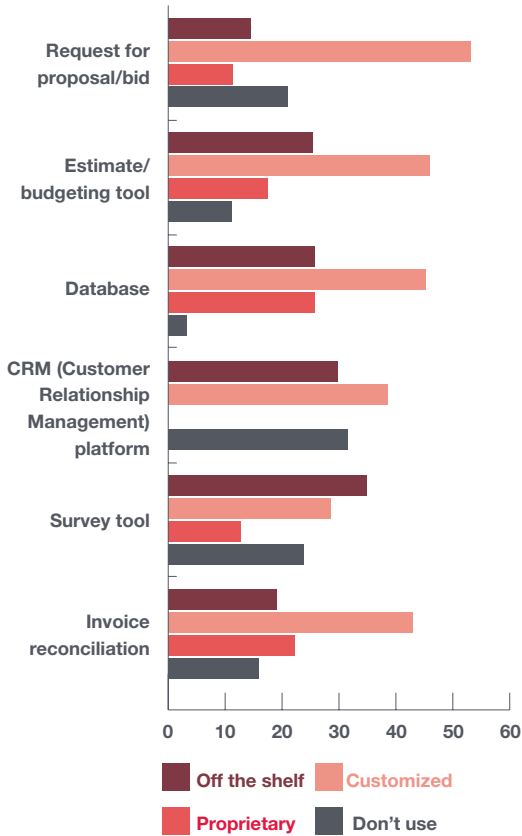
It is apparent that industry members must concentrate on development of organized multi-year plans. As previously noted, the survey shows that currently only 12.5% of respondents (9.6% of providers) plan ahead for technological needs.

As previously noted, technology generates greater productivity and efficiency but it also increases workload and stress. Companies must be aware of this fact and find ways to balance the negative impacts.

It is further apparent that there is a bewildering array of technology options all of which must be learned in addition to the ongoing workload (hence the stress). Some people are opting to work with what they understand rather than going for new approaches. The low uptake on some of the social media options is an indication of that. This will be an area for ongoing education.

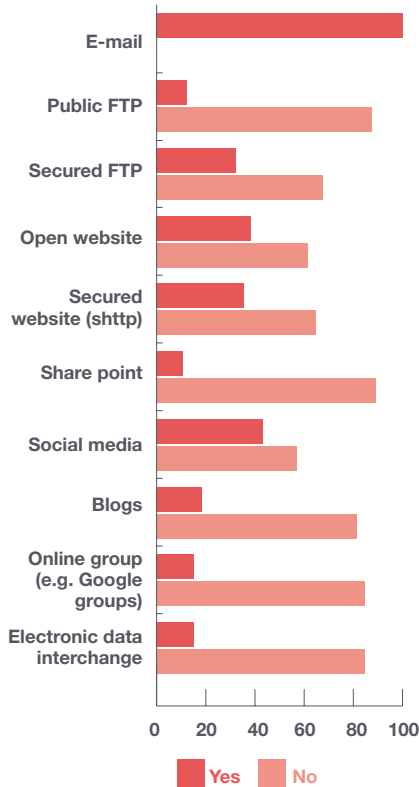
Applications

Which means of technology does your organization use for the following needs? (In responding, please consider a system like Zoomerang as a purchased off the shelf system.)



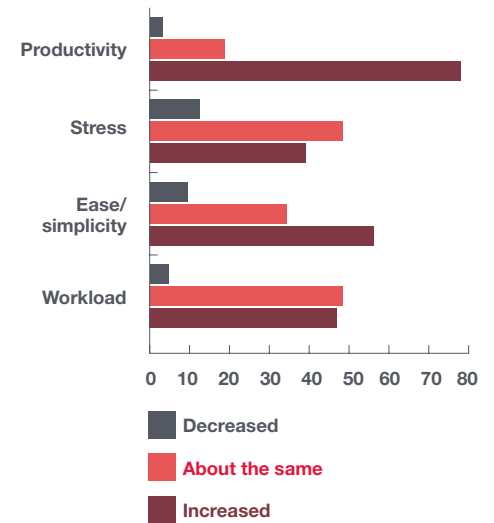
Communications

Does your organization exchange information with customers and partners using (check all that apply):



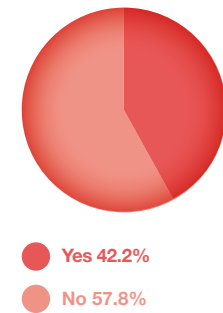
Personal Impact

How has technology specifically affected your personal work?



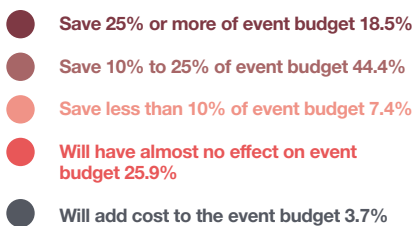
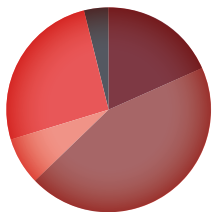
Virtual Meetings

Does your organization use virtual meeting technology?



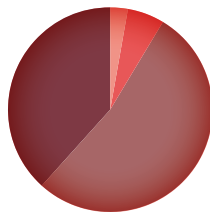
Meeting Cost Reduction

If yes, in terms of cost, what do you think the use of virtual meeting technology (e.g. video) will save clients?



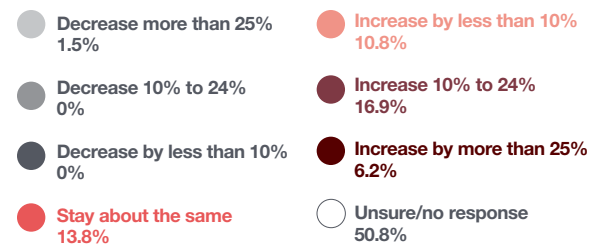
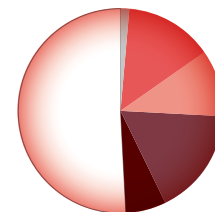
Partnerships

How important is a company's available technology when it comes to selecting partners?



Future Uses

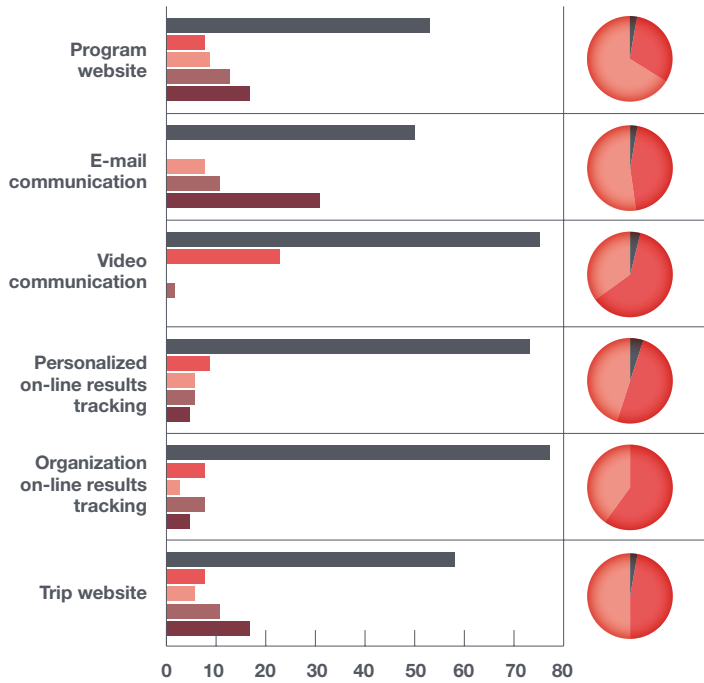
What do you predict will happen to client use of integrated technology platforms for incentive programs over the next 12 months?



The use of technology continues to increase in all aspects of programs. Listed below are four stages of a program. After each one are listed some specific technologies. Please choose the frequency with which that technology is used in that specific stage of a program. Then, select whether the usage of that technology is decreasing, increasing or staying the same.

Program Marketing

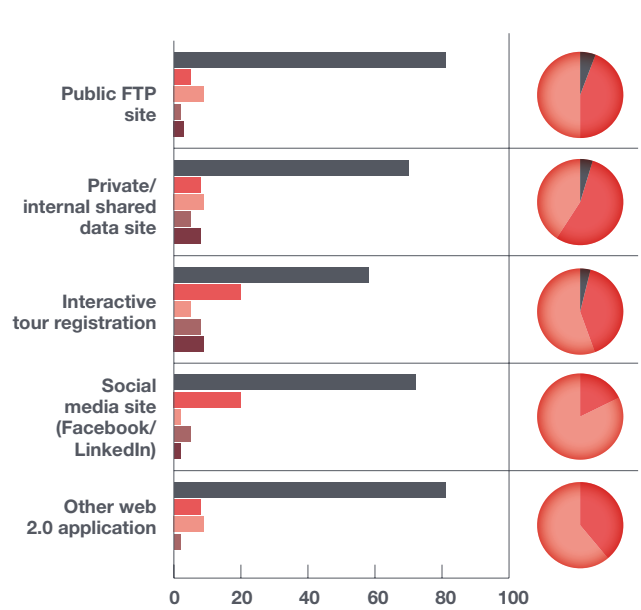
Frequency of Use



Bar Graphs ■ Don't use ■ 25% ■ 50% ■ 75% ■ 100%

Pre-Program Logistics

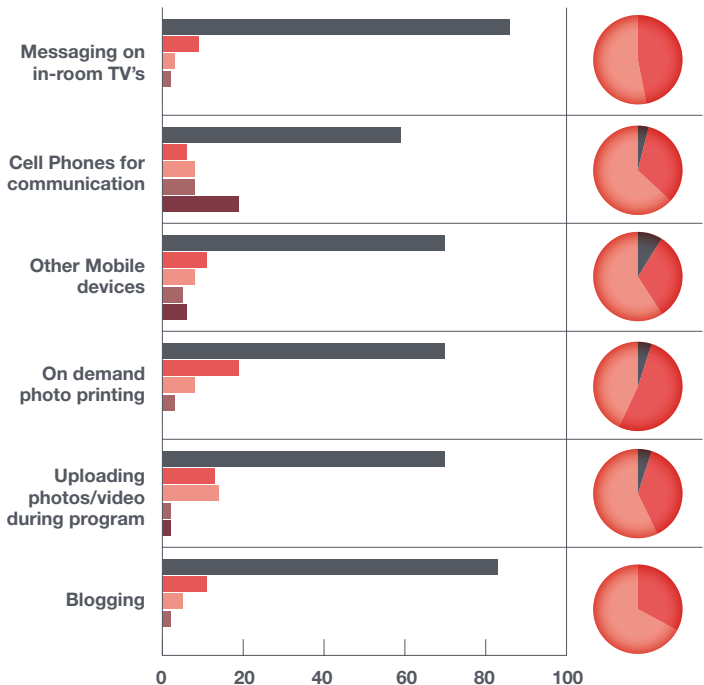
Frequency of Use



Pie Charts ● Decrease ● Staying the same ● Increase

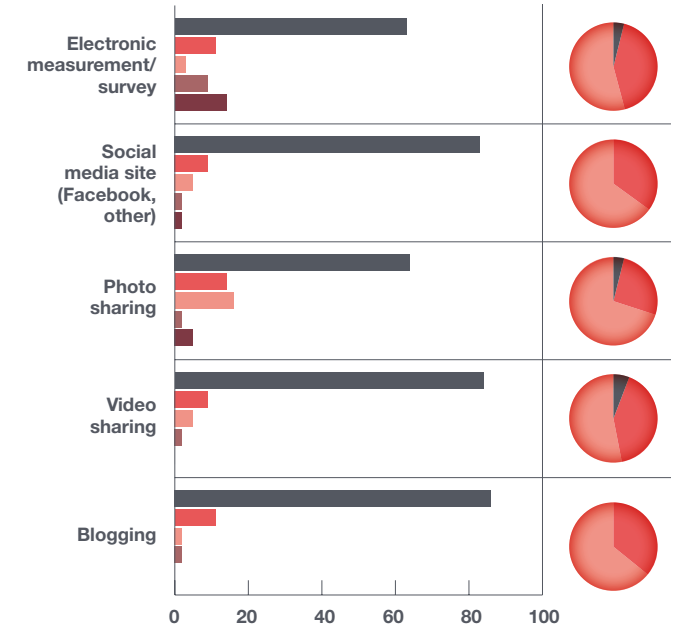
Onsite Program Operation

Frequency of Use



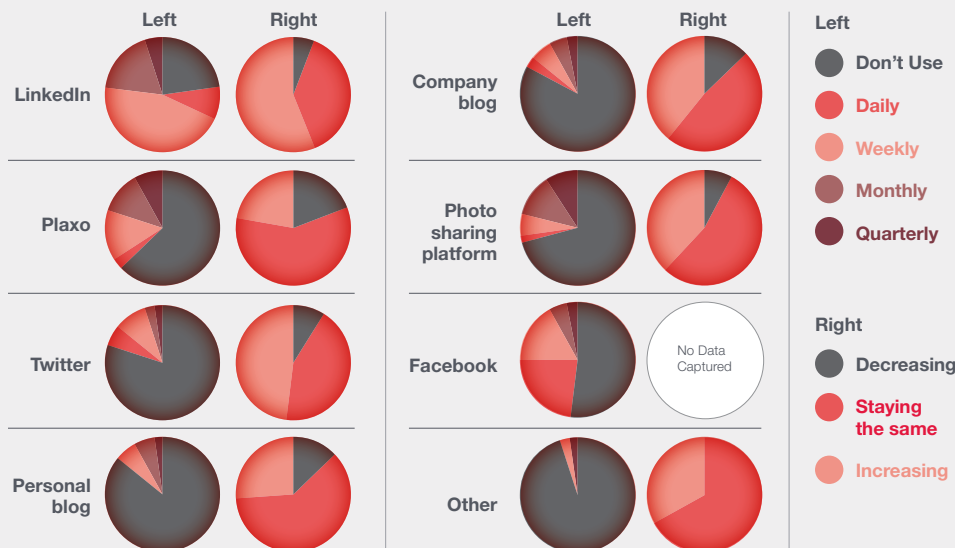
Post Program

Frequency of Use



Uses of Technology

What best describes your use, as an individual, of the following online applications?



The Site Index

The Site International Foundation maintains an ongoing research project that serves as an analysis and forecast for the motivational events industry. **The Site Index** is composed of an annual survey and interim reports.

Data for **The Site Index** are derived from the collective experiences and perspectives of a global group of highly qualified incentive travel and motivational event users and providers. Research examines both internal and external challenges to our business and how these factors impact the stability and growth of our market. It addresses behaviors of buyers and supplier partners, providing leading indicators for future trends.

All data—including the list of participants—are maintained on a strictly confidential basis by the researchers and are never available to the Site International Foundation or Site.

There is an opportunity for you as a user or provider of motivational events to promote our industry and have access to information that will increase your proficiency. As an industry, cooperation—coupled with the guarantee of confidentiality—can create the strongest database of information ever available to our industry.

We urge you to become part of this project at <http://siteindex.monmouth.edu>.

You can make a difference!

Methodology and Researchers

All registrants in **The Site Index** database were invited to participate in this survey. The survey had a response rate of 25%. 85% of the responses represented provider firms and 15% represented users/consumers of motivational events. Seventeen countries were represented among respondents with the majority from the United States, the United Kingdom, Canada, India and Italy.

The survey was supervised by Scott A. Jeffrey, Ph.D., Monmouth University and Marion Joppe, Ph.D., University of Guelph.

Our Thanks

This **Site Index** report was made possible by partner donations from the Canadian Tourism Commission, InterContinental Hotels Group and Mexico Tourism. If your organization would like to say yes to supporting **The Site Index** and the Site International Foundation, please contact site@siteglobal.com.



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 by providing research and educational programs that assist business executives, practitioners and partners who operate in our community since 2006.

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Site

Site has grown since its inception 35 years ago to more than 2,200 members in 87 countries with 36 local and regional chapters. It is the only global authority connecting motivational experiences with business results. The community of Site professionals brings best-in-class solutions, insights and global connections to maximize the business impact of motivational experiences regardless of industry, region or culture. Site serves as the source of expertise, knowledge and personal connections that will catapult and sustain professional growth and help build the value of extraordinary, motivational experiences worldwide.

