



Incentive Travel Index

Survey Results 2023



Incentive Travel Index



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Incentive Travel Index



IRF & SITE Foundation would like to thank the following partners
without whom this study would not have been possible

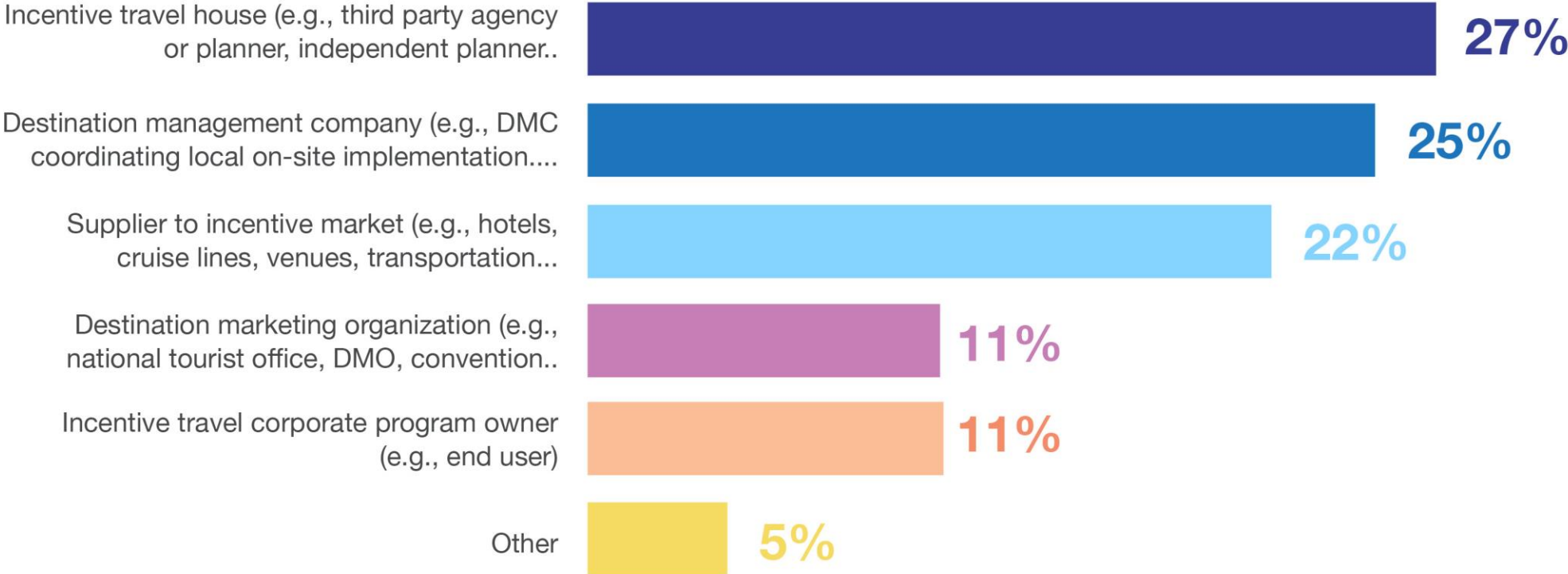


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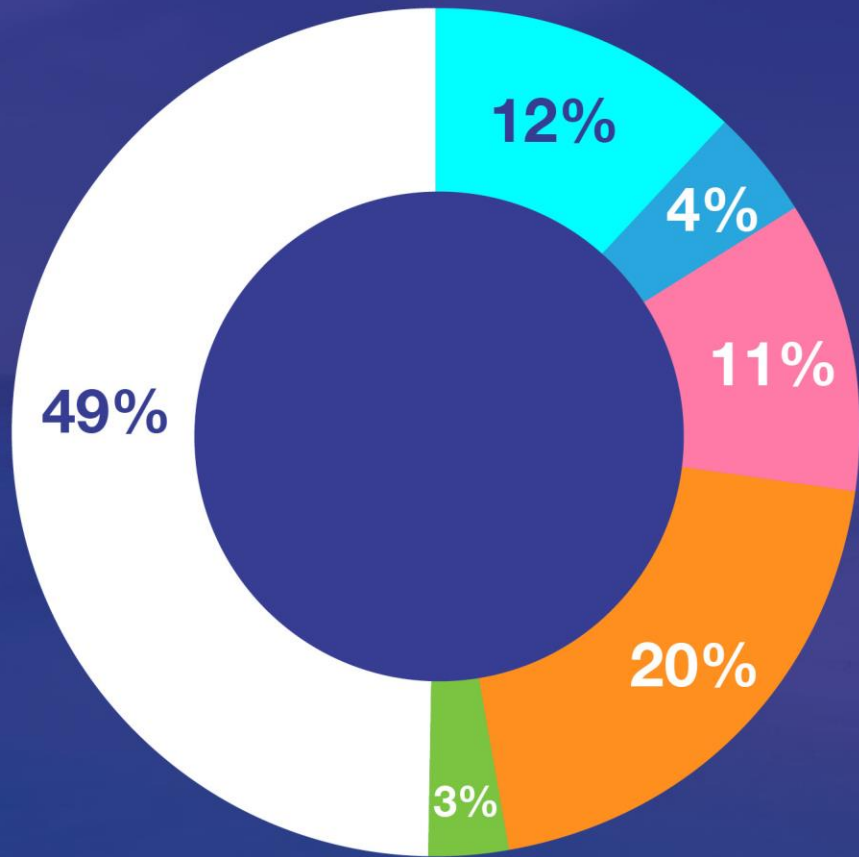
Responses by Incentive Travel Industry segment



Respondent category

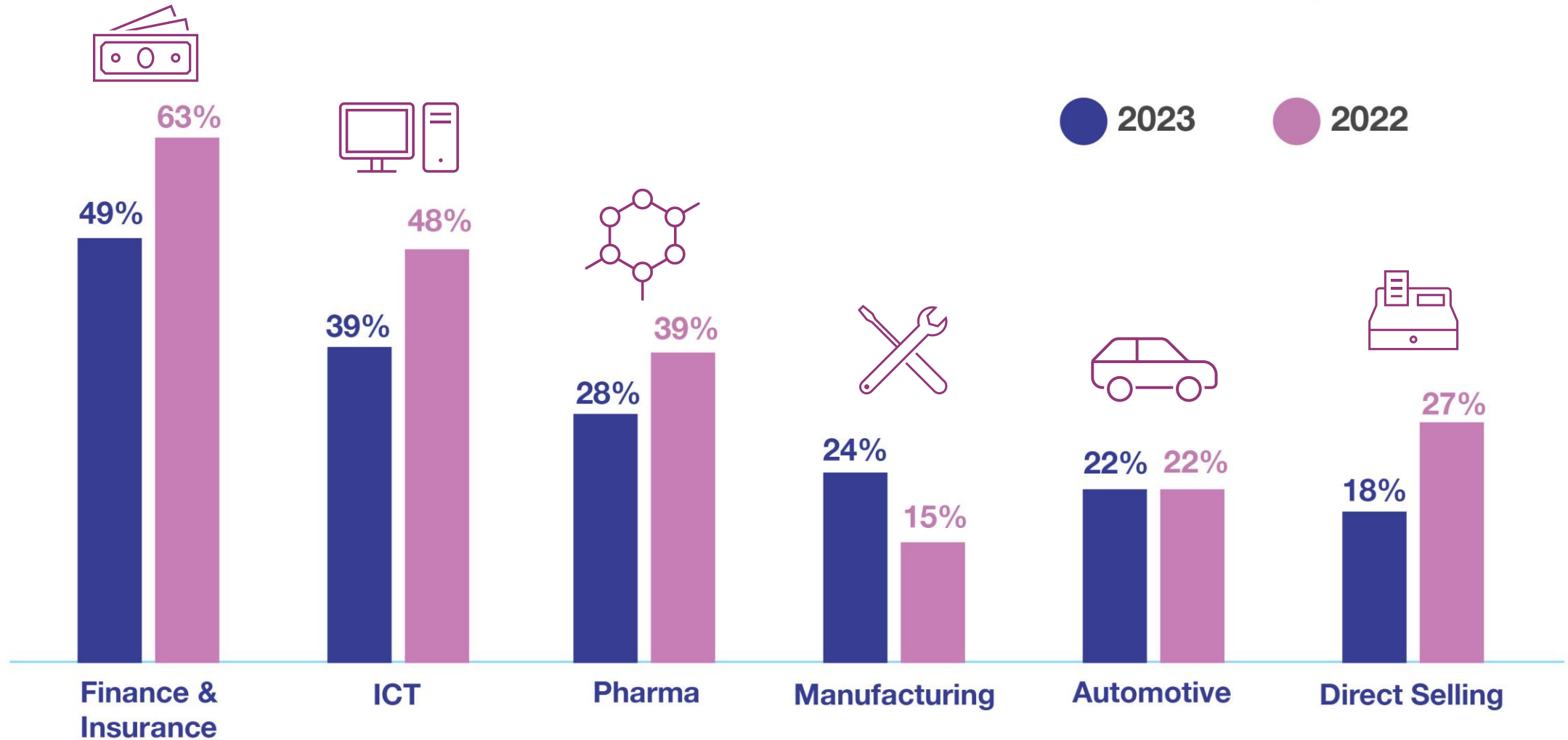


Responses by Region



- USA & Canada (49%)
- Asia Pacific (APAC) (12%)
- Latin America (LATAM) (4%)
- Central America, Caribbean & Mexico (11%)
- Europe (20%)
- Middle East / Africa (3%)

Responses by Industry Vertical





**Incentive
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Selected Topics & Themes IMEX 2023

**The Purpose
of Incentive
Travel**

**Growth,
Budgets,
Spend**

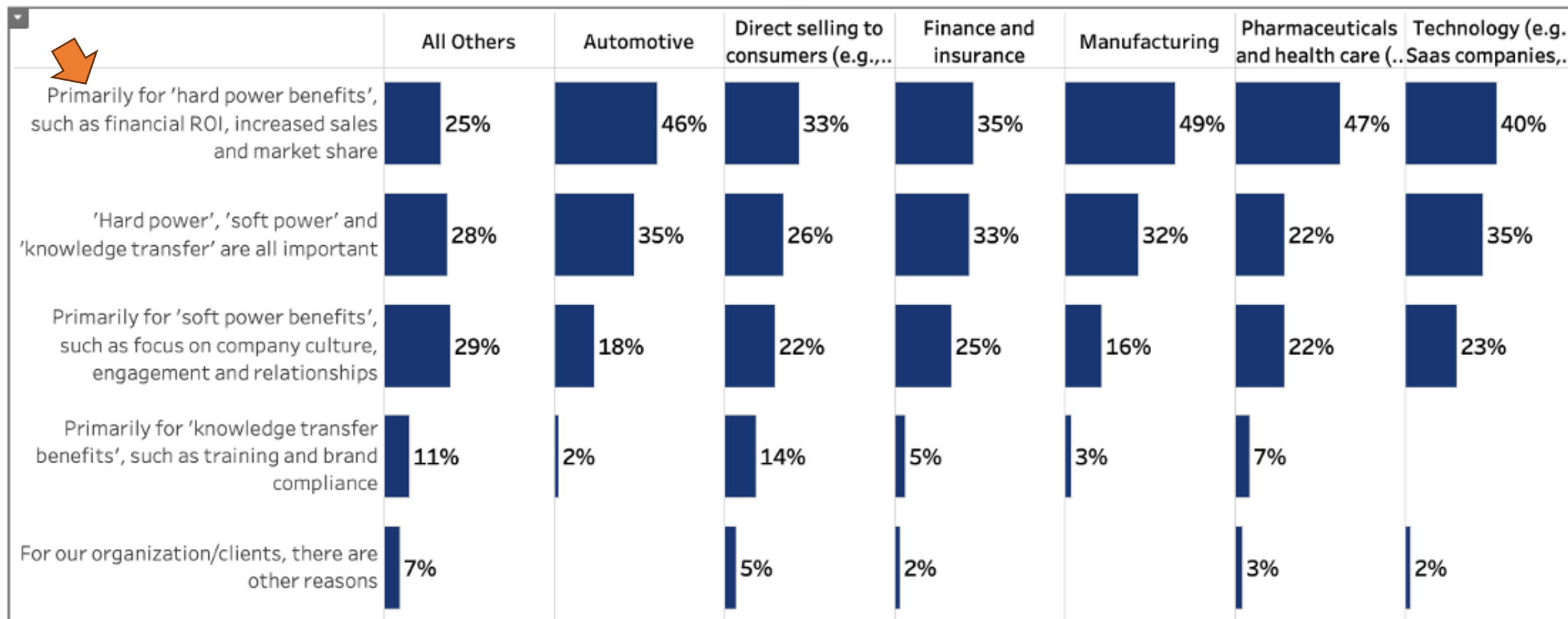
**Channel
Relationships**

**Destination
Selection**

THE PURPOSE OF INCENTIVE TRAVEL



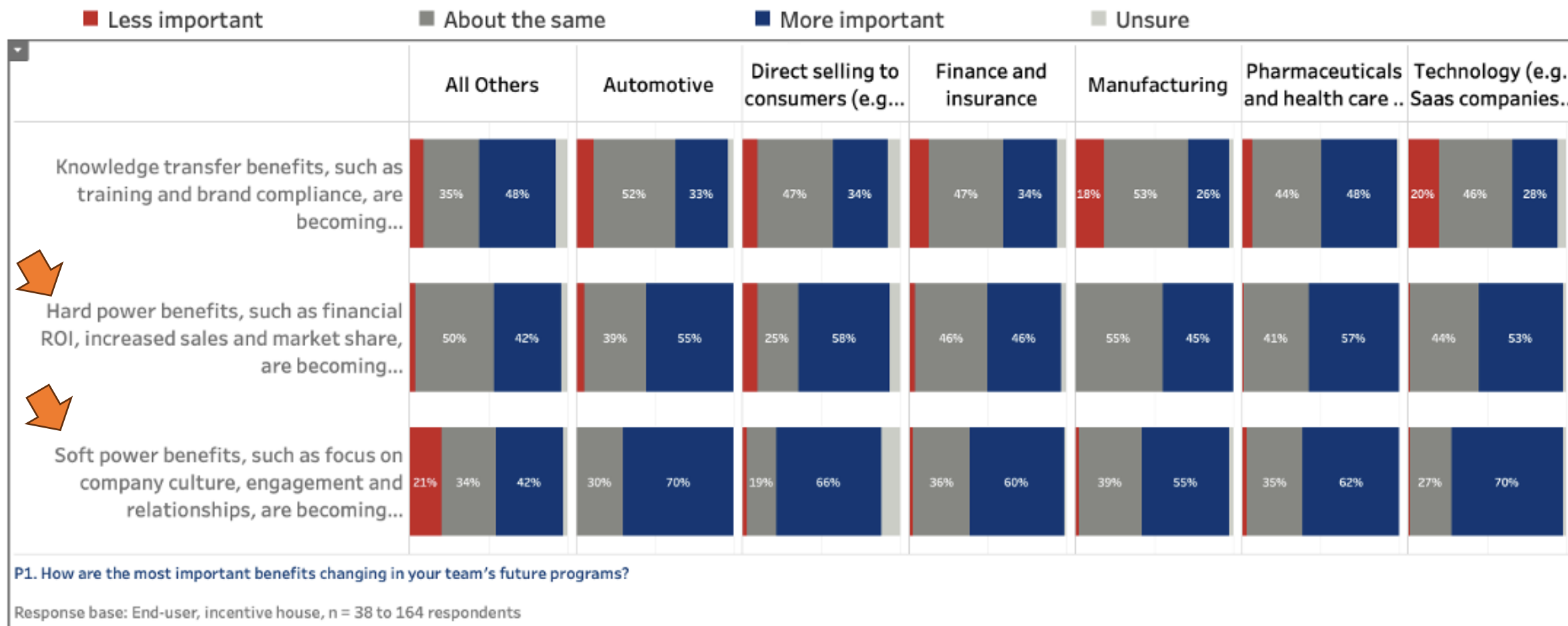
Reasons for using incentive travel



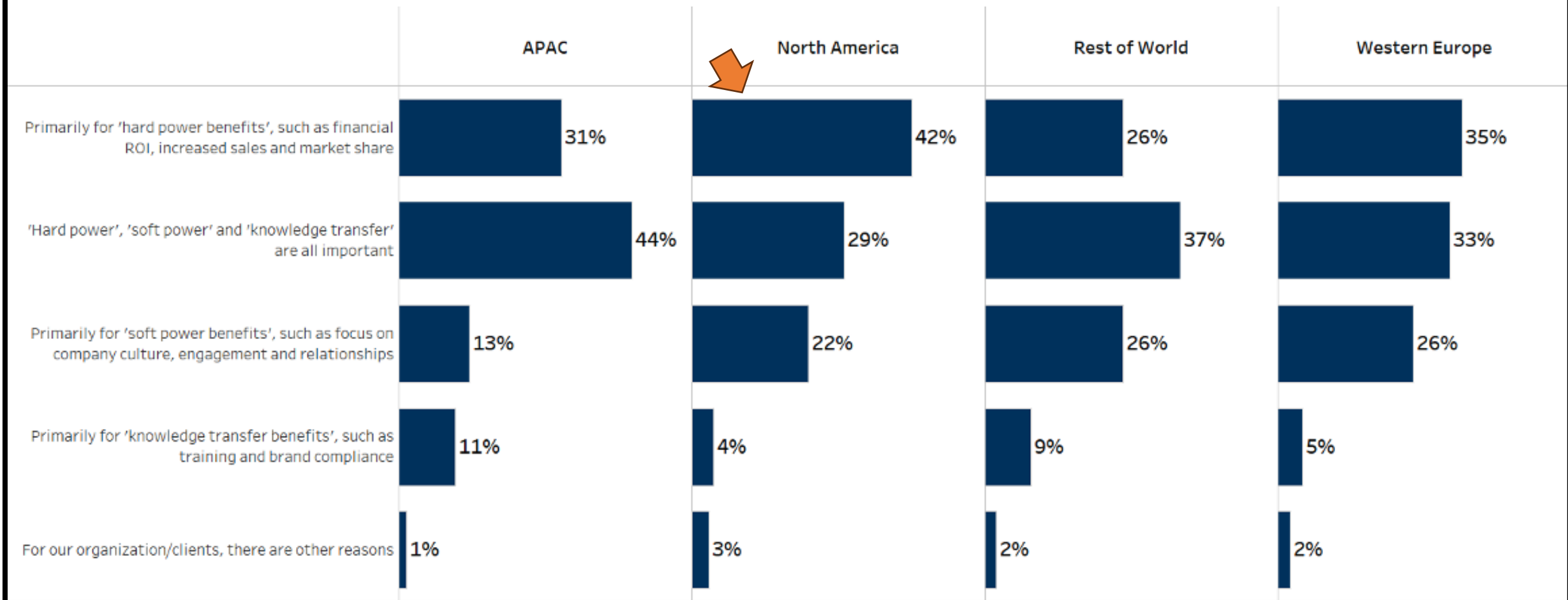
G7. Why does your organization use an incentive travel program?/Why do your clients use incentive travel programs?

Response base: End-users, incentive house, n = 37 to 177 respondents

Changing benefits for the future of incentive travel



Reasons for using incentive travel



57. Why does your organization use an incentive travel program?/Why do your clients use incentive travel programs?

Response base: End-users, Incentive house, n = 43 to 336 respondents

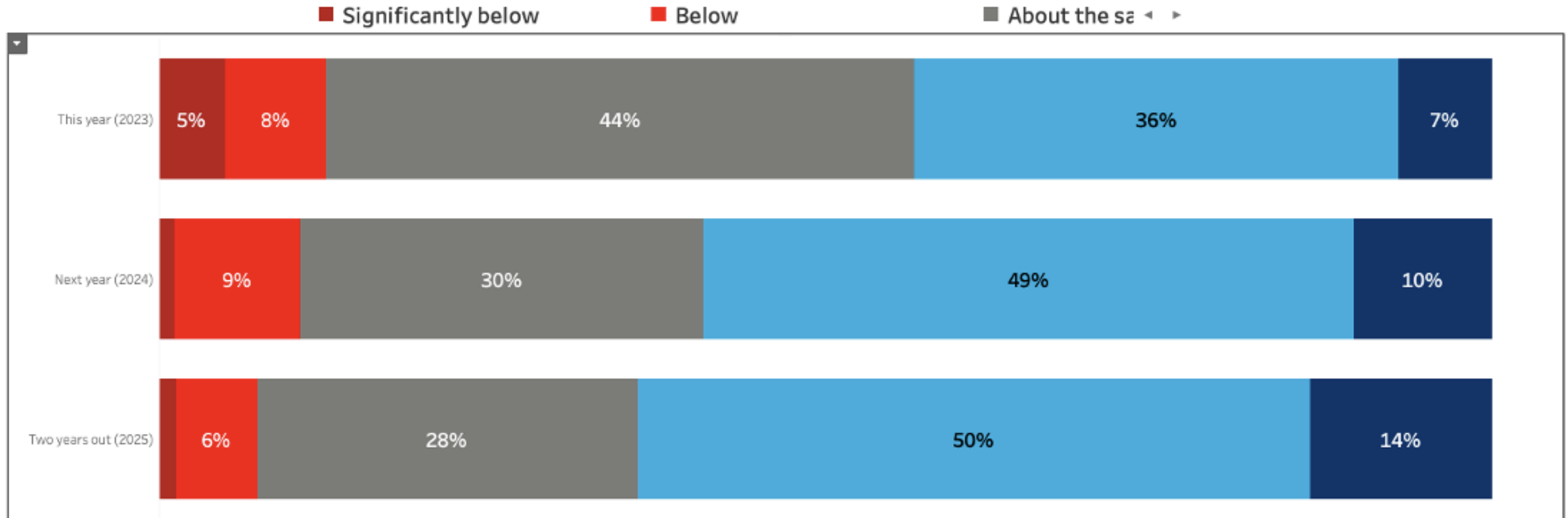
GROWTH, BUDGETS, PER CAPITA SPENDING

Panel Discussion



Expectations of incentive travel spending

Spend per person relative to 2022



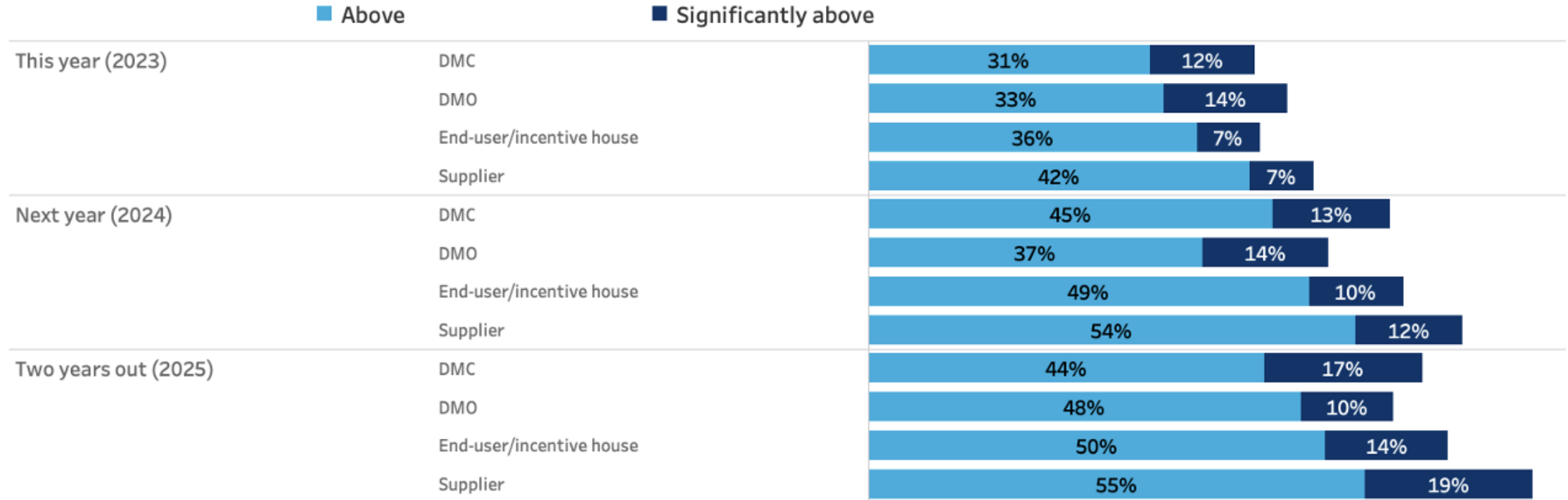
G2a. What level of spending per person do you expect in your team's incentive travel programs relative to 2022?

Response base: End-user, incentive house , n = 704 respondents



Expectations of incentive travel spending

Spend per person relative to 2022



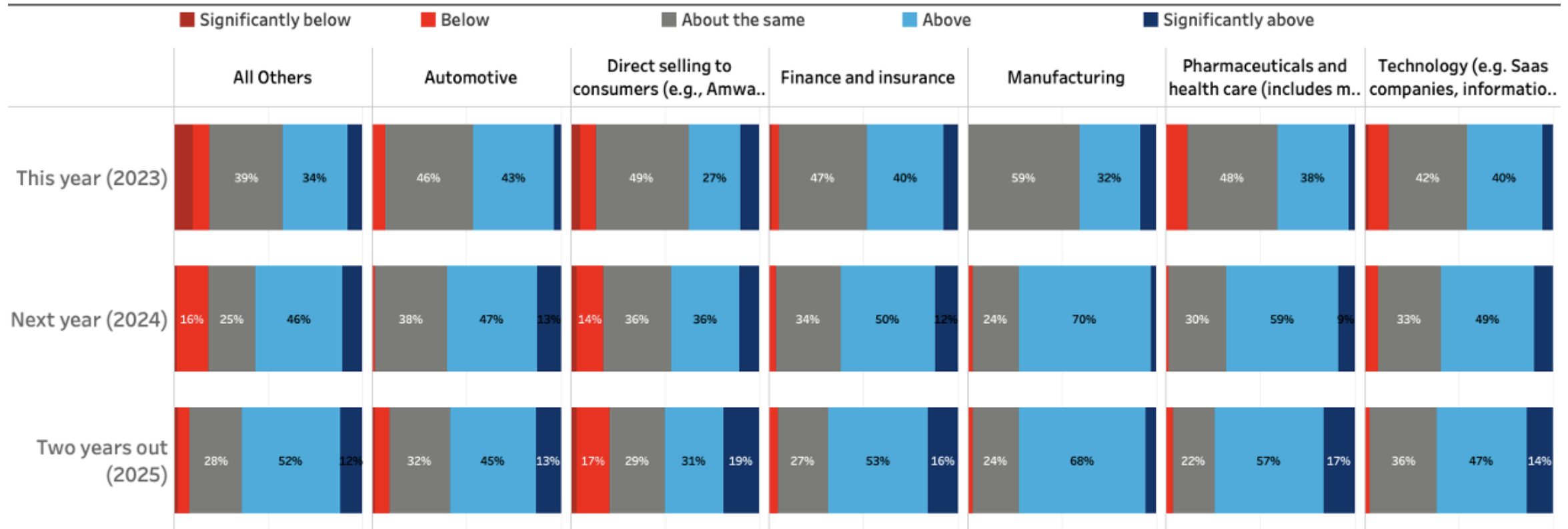
G2a. What level of spending per person do you expect in your team's incentive travel programs relative to 2022?, G2b. What level of spending per person do you expect in the incentive travel programs for which your team is responsible relative to last year (2022)?, G2c. What level of spending per person do you expect in the incentive travel programs for which your team is responsible relative to last year (2022)? and 1 more

Response base: DMC, DMO, end-user/incentive house, supplier , n = 1,912 respondents



Expectations of incentive travel spending

Spend per person relative to 2022



G2a. What level of spending per person do you expect in your team's incentive travel programs relative to 2022?

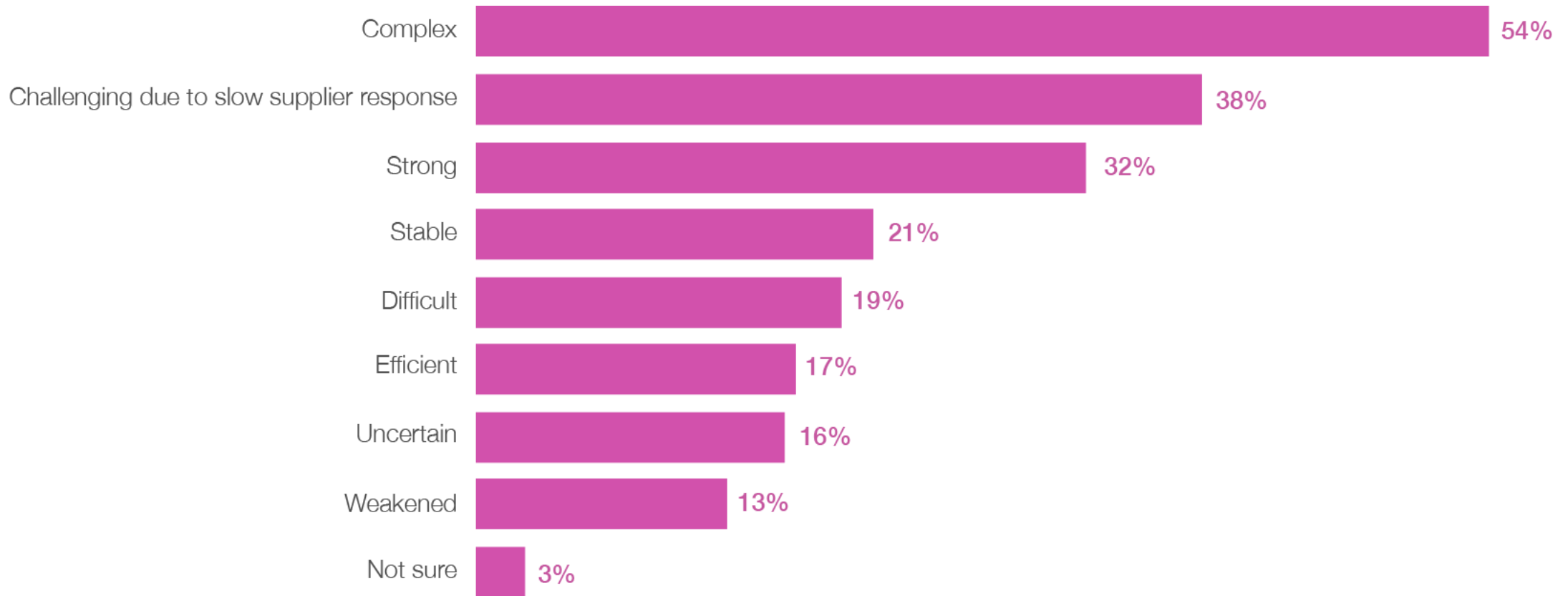
Response base: End-user, incentive house, n = 37 to 275 respondents



CHANNEL RELATIONSHIPS



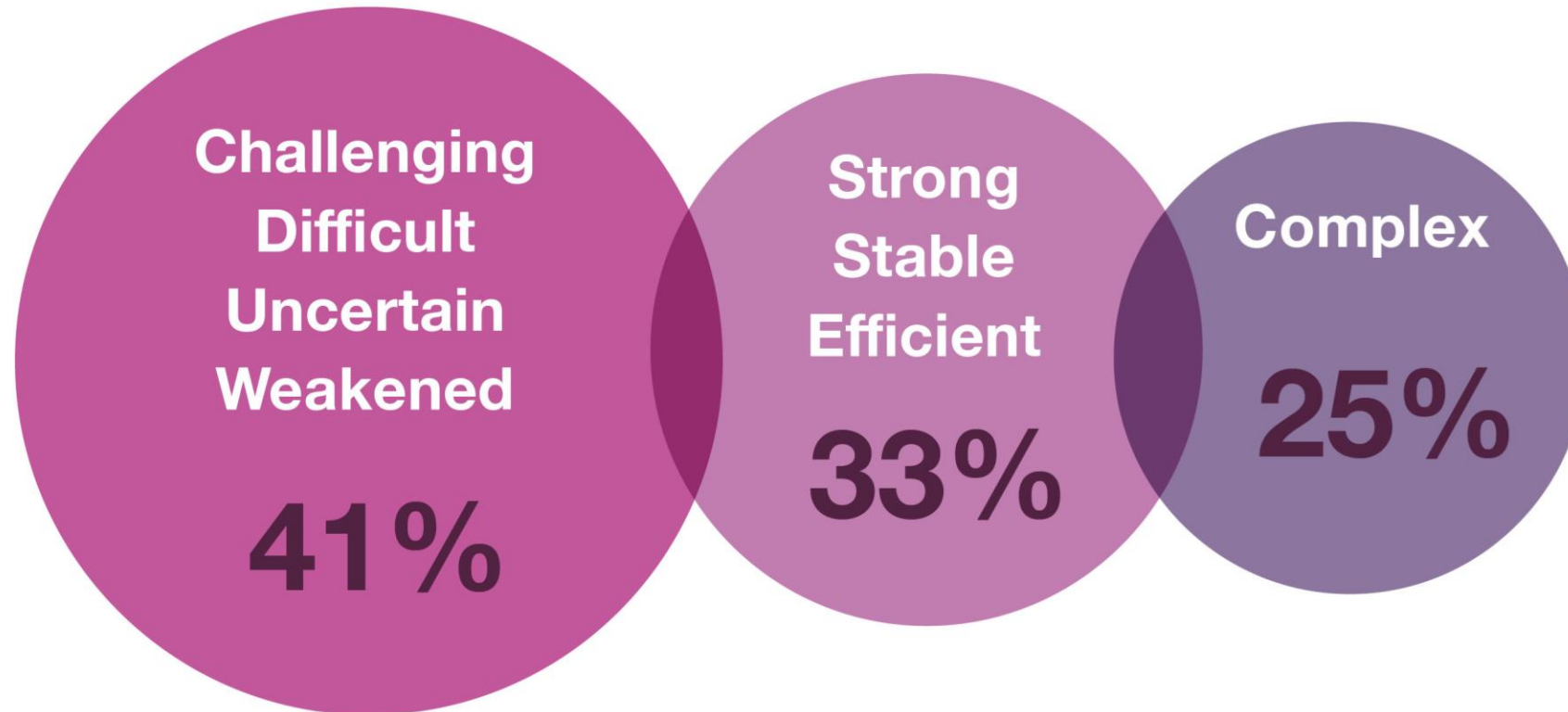
Channel Relationships



S9. Relationships between incentive travel buyers and suppliers are currently?

Response base: All, n = 1,760 respondents

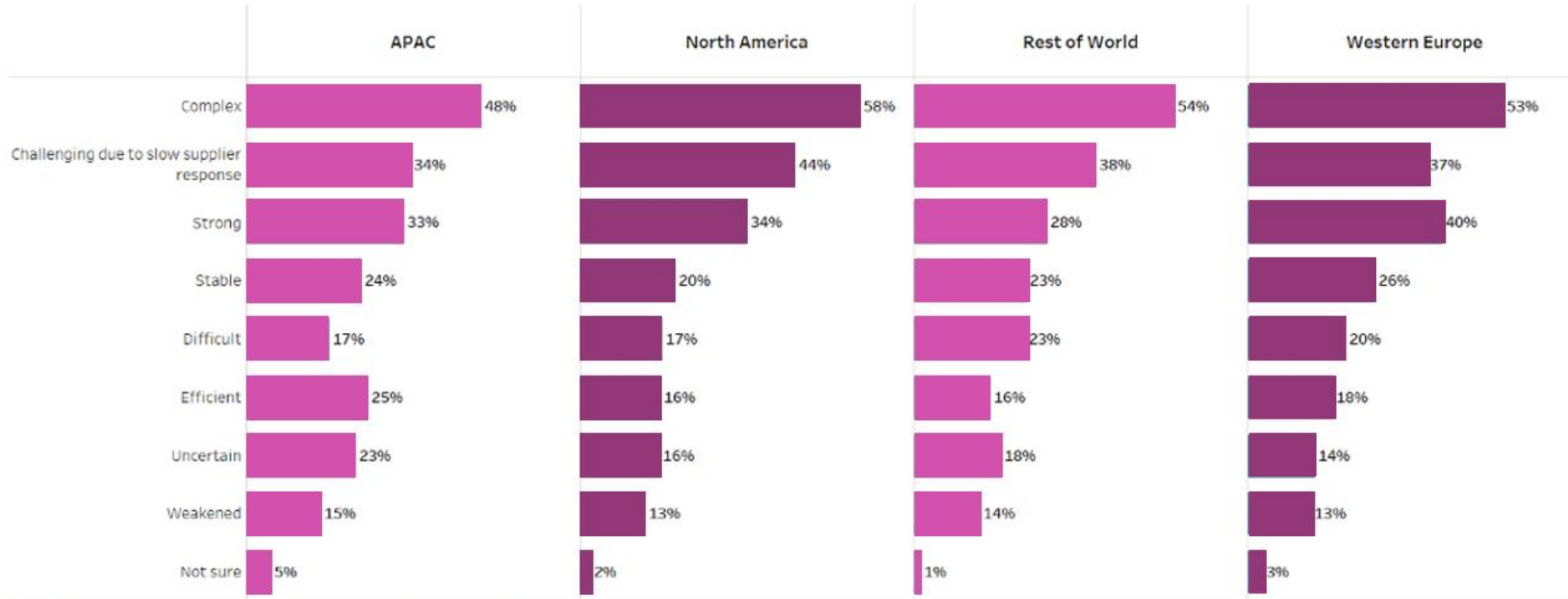
Channel Relationships – Absolute Numbers



Channel Relationships – Geographies



Senior management view on incentive travel

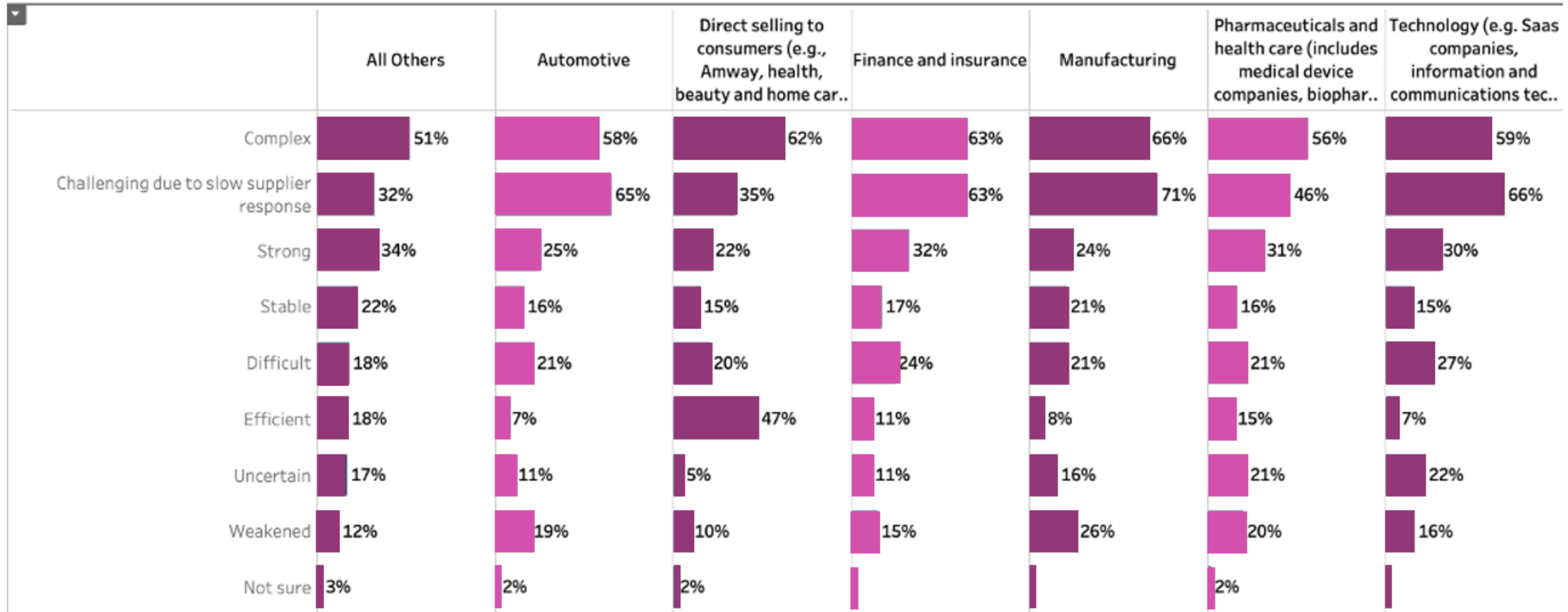


S9. Relationships between incentive travel buyers and suppliers are currently?
 Response base: All, n = 240 to 864 respondents



Channel Relationships – Industry Verticals

Senior management view on incentive travel



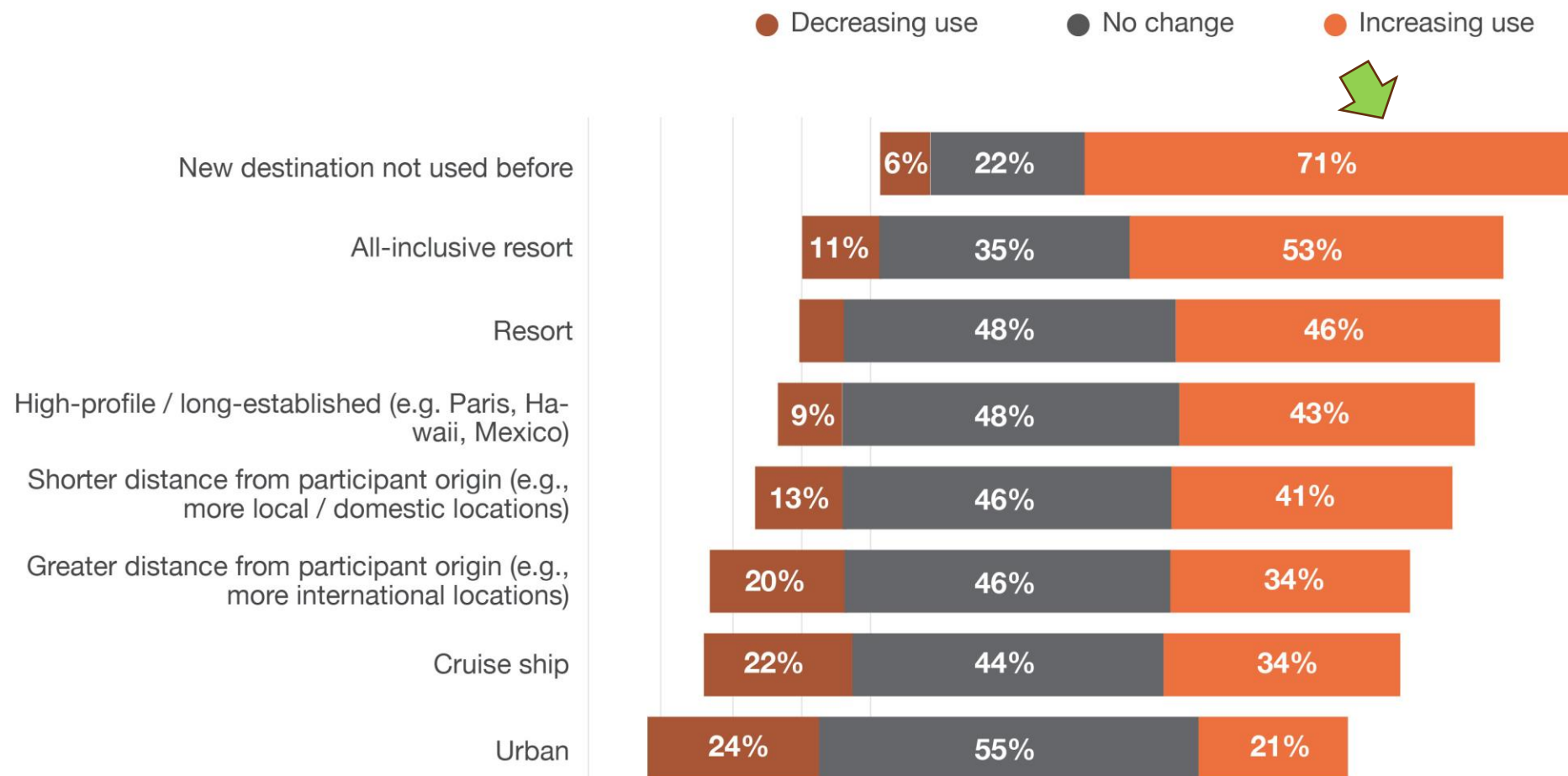
S9. Relationships between incentive travel buyers and suppliers are currently?

Response base: All, n = 38 to 1,329 respondents

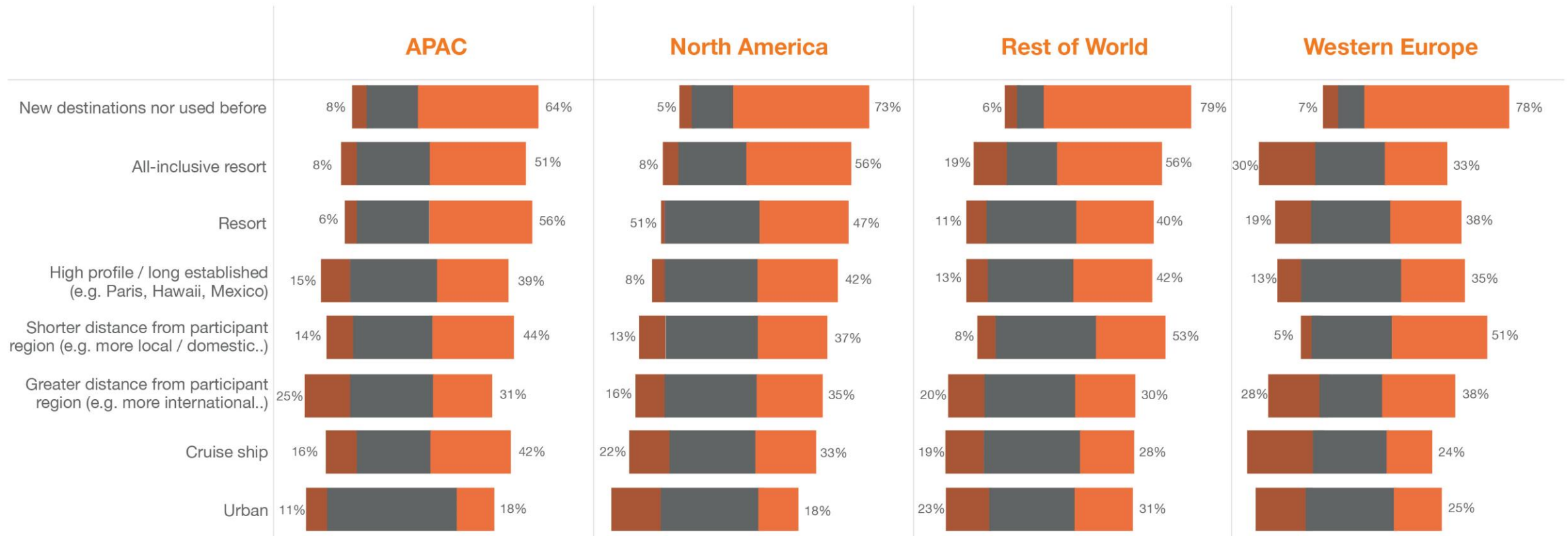
DESTINATION SELECTION



Destination Type Changes



Destination Type Changes



Destination Type Changes

● Decreasing use ● No change ● Increasing use

	All Others	Automotive	Direct selling to consumers (e.g., Amway, health..)	Finance and insurance	Manufacturing	Pharmaceuticals and health c..	Technology (e.g. SaaS companies, information an..)
New destinations not used before	26% 63%	73%	66%	76%	76%	32% 67%	79%
All-inclusive resort	37% 47%	30% 63%	31% 58%	37% 53%	29% 61%	35% 53%	41% 49%
Resort	48% 42%	36% 60%	46% 44%	54% 42%	58% 39%	58% 42%	39% 58%
High profile / long-established (e.g., Paris, Hawaii, Mexico)	45% 48%	56% 36%	31% 53%	58% 33%	51% 41%	49% 39%	42% 49%
Shorter distance from participant origin (e.g., more local/domestic locations)	43% 42%	54% 41%	36% 40%	54% 34%	39% 53%	52% 35%	42% 47%
Greater distance from participant origin (e.g., more international locations)	31% 42% 28%	52% 37%	49% 29%	52% 34%	45% 39%	42% 42%	41% 38%
Cruise ship	41% 35%	41% 37%	40% 41%	52% 30%	32% 55%	25% 45% 30%	25% 48% 27%
Urban	60%	59%	26% 37% 37%	55%	68%	28% 56%	30% 48%



Destination Choice – North American Buyers

	North American Buyers	More	Same	Less	Net
1	Caribbean	147	113	18	129
2	Western Europe	121	101	18	103
5	Mexico	121	116	40	81
4	Central America	107	100	30	77
5	United States	106	147	33	73
6	Canada	98	101	27	71
7	Emerging Europe	94	51	27	67
8	Hawai'i	103	103	37	66
9	Cruise	91	64	31	60
10	Alaska	33	73	43	-10



Destination now being considered

	North American Buyers	Will Consider	Will NOT Consider	Net
1	Canada	75	24	51
2	Alaska	110	63	47
5	Cruise	100	54	46
4	Hawai'i	64	21	43
5	Emerging Europe	93	60	33
6	Central America	57	36	21
7	Western Europe	56	35	21
8	Caribbean	37	19	18
9	United States	28	15	13
10	Mexico	28	21	7



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MEET SITE

- ✦ Society for Incentive Travel Excellence
- ✦ Global Association focused EXCLUSIVELY on excellence in Incentive Travel
- ✦ SITE is truly GLOBAL – 2,700 members / 90 countries / 26 chapters
- ✦ The global voice of the Incentive Travel Industry

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90
countries



2,700
members



26
chapters





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