

# What a Trip!

**Making the Business Case for Incentive Travel**







# Making the Business Case for Incentive Travel

**It's a 'top of the pyramid' reward, but selling it to the C-suite requires careful planning.**

BY PAUL NOLAN

Must Read Quotes is a UK-based online resource for inspiring, educational and entertaining quotes that come “dressed” with designer-quality images. Company founder and CEO Maurizio Petrone leads a team of seven remote employees (spanning four continents) that tackle quotation research, classification and art direction.

Petrone said his team is building awareness and website traffic that will ultimately generate display advertising and the sale of printed products. He emphasizes that, as with any company, accuracy and efficiency are critical to the company’s success. If a quotation or author is entered incorrectly, or if an illustration that is selected to run with one quote is inadvertently used with a different one, an error ticket is submitted, corrections are made and republishing is required.

“Each ticket takes around 5x the time it takes to enter the quote correctly in the first place, which is a cost that we have to pay in the form of labor time,” Petrone stated in an email exchange.

To minimize errors and maximize efficiency, Petrone designed a points-based system in which his team members were rewarded for achieving targets, collaborating effectively and exercising exceptional work ethics. Once they reached a certain threshold, each employee qualified for an all-expenses-paid trip.

Petrone brought qualifying workers together for a three-day retreat in Turkey. One day was dedicated to addressing business matters and two days were set aside for exploration and fun. They cruised the Bosphorus Strait and soared in a hot

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air balloon above the historical Cappadocia region in Central Turkey.

### Not Just for Sales

Recognizing top performers with a trip that is loaded with celebratory events is not new, but one aspect of Petrone's program is in line with an emerging trend — rewarding non-sales employees.

Incentive travel programs have long been a means to drive performance from sales teams. These programs are pricey, thus a significant bump in revenue was the most practical way to sell them to the C-suite. The formula was to set revenue goals that would cover the cost of an incentive travel program and increase corporate profits at the same time.

However, the 2022 Incentive Travel Index, an annual assessment of trends and sentiment among incentive travel suppliers and users, reports that two-thirds of buyers state they are placing a greater focus on “soft power benefits” such as company culture and engagement over increased sales. (See the accompanying chart.)

“A key topic that we spend a lot of time with our clients on is monetizing behaviors,” said Lincoln Smith, chief strategy officer for HMI Performance Incentives, which designs and manages incentive and loyalty campaigns. “That’s a little easier for sales

**66%** of buyers expect soft power benefits, such as focus on company culture, engagement and relationships, to be more important in future programs.

Source: SITE 2022 Incentive Travel Index

incentives or [channel partner] programs, where you have the sales dollars or units being the key matrix that you’re earning to go on the trip. But what we’re finding is [clients] building a program that goes beyond just the sales and the transactions. That might be for learning enablement, certifications, referrals, participating in market research and data insights.”

Petrone’s team doesn’t even have a sales component yet. The startup is still generating enough traffic to support advertising. ROI was measured in terms of employee engagement,

## Culture and engagement benefits are front and center

Strategic role of incentive travel

### Buyers are shifting programs toward a greater focus on soft power benefits

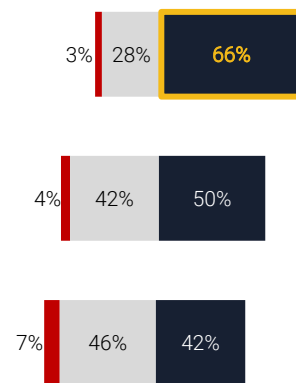
While hard power benefits, such as increased sales remain key, two-third of buyers report they are shifting future programs toward a greater focus on soft power benefits, such as company culture and engagement.

### Changing benefits reported by buyers (Share of buyers)

Soft power benefits, such as focus on company culture, engagement and relationships

Hard power benefits, such as financial ROI, increased sales and market share

Knowledge transfer benefits, such as training and brand compliance



■ Less important   ■ About the same   ■ More important

Incentive Travel Index

P1. In your future programs, how are the most important benefits changing?  
Response base (Buyers): n = 563 respondents

Incentive travel programs are not just for boosting sales anymore. Softer goals are an increasing part of companies' strategies.

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productivity and reduced attrition rather than focusing on bumping sales. Just as Smith advised, Petrone attached a monetary value to key performance indicators for each member of his team. The researcher was measured by the number of quotes produced each month, the designer had target goals for the number of images generated per month.

The program’s objectives also aimed to foster team bonding, strengthen cross-functional collaborations, and culminate in an enhanced company culture, Petrone said.

Productivity rose an average of 3% companywide, which Petrone said was in line with his expectations because the team was already performing at a high level. More importantly, errors fell by almost 10% in the two months after the team event, which he attributes to increased concentration and overall satisfaction with work.

“The ROI of increased accuracy is the most quantifiable for us since we know the cost of each [error] ticket we create. That alone covered 20% of the total cost of the trip,” Petrone said.

He also credits the incentive trip with helping him keep his team intact, thereby reducing training costs. Petrone added,

“Then there are the intangibles, such as loyalty and morale and engagement, which I believe will produce returns in the long run but will always be hard to quantify.”

### A Proven Motivator

There is little doubt about the motivational appeal of group incentive travel. In a survey of 400 sales professionals earlier this year by the Incentive Research Foundation, 91% stated that incentive travel experiences are “very” or “extremely” motivating. With work forces skewing younger, it’s important to note that 64% of Gen Z (21 to 26 years old) and millennials (27 to 42 years old) feel group travel is “extremely rewarding,” a higher approval rate than workers over 42.

SITE research of incentive travel program participants in cooperation with the Cox School of Business at Southern Methodist University showed the average age of incentive travel award winners is 43, while the average income is \$166,000. The average age of program participants may continue to get younger, a fact that program sponsors must factor into the activities they incorporate into an event.

## Priorities and Drivers of Positive Incentive Trip Experiences

*If you were awarded an incentive award trip, how important would it be to you that...?*

Area	% Extremely Important	'Somewhat' or 'Extremely' Important	'Somewhat unimportant' or 'Not important at all'	Net
You are given ample free time to relax.	50%	81%	7%	74%
You can take a guest along.	51%	76%	9%	68%
You are provided a bit of spending money to cover 'extras' or out-of-pocket expenses.	38%	76%	8%	68%
The trip gives you the opportunity to have unique experiences you could not otherwise have.	41%	76%	11%	65%
The trip offers luxury accommodations and experiences.	40%	72%	9%	63%
The trip gives you an opportunity to experience a unique culture.	36%	70%	12%	59%
The trip was to a destination to which you had never been before.	33%	70%	13%	57%
The trip provides a more intimate and exclusive experience even if it means fewer winners.	32%	68%	12%	56%
Having an abbreviated travel time to arrive at the destination.	29%	60%	13%	47%
Your seat is upgraded to a seat better than economy class.	29%	61%	19%	42%
You have the opportunity for significant professional networking.	31%	57%	20%	37%
You receive a merchandise gift as part of the experience.	24%	55%	18%	37%
You have the opportunity to be recognized in front of your peers.	28%	54%	23%	31%

Program sponsors must be mindful of what drives excitement among participants when launching a campaign.



# Ample free time and the ability to bring a guest are the top two drivers of positive incentive trip experiences.

Source: IRF Attendee Preferences for Incentive Travel (2023)

Historically, incentive travel events have been centered around team building and bringing workers and top brass together to celebrate successes. However, research from both SITE and the IRF shows the most important thing that participants want in an incentive trip is to be given ample time to relax and make their own decisions about how to spend their time. Other characteristics of these programs that are rated most important by participants include the ability to bring a guest, receiving extra spending money from the program sponsor, and having a unique experience.

Interestingly, having the opportunity to network and being recognized in front of peers ranked among the lowest priorities of program participants. (See accompanying chart.)

“If you’re a senior leader who traditionally has looked at these programs as giving people access to you, it’s going to be a bit of a mind shift,” said IRF President Stephanie Harris. “It’s incumbent on that program owner to [make clear to] leaders that participants want a different kind of interaction. It’s got to look different. It can’t be so structured.”

Smith also does not feel the trend toward providing more free time and less structured networking works against program sponsors’ desire to enhance team cohesion and loyalty. He suggests that it could be wise to swap a team social gathering for an altruistic activity that gives back to the community where the event is being held. Such an activity increases authenticity and memorability by creating opportunities in which participants can interact with locals, he said.

## Launch to Review: Best Practices

As with anything that must be run by the C-suite for approval, successfully selling a group incentive travel program requires a detailed plan with a clear return on investment. Here are some key components and best practices of launching, staging and assessing a program.

- **Choose the right destination** – Participants express a higher level of interest in international destinations, especially ones that allow for plenty of time in the sun and on the beach.

Destination selection is a balancing act of many factors, including the goals of the program, the demographics

## Think In Moments

With incentive trip participants increasingly desiring more free time, program sponsors may worry that the team-building component of group travel they deem critically important is harder to create.

The good news, say Dan and Chip Heath, authors of “The Power of Moments: Why Certain Experiences Have Extraordinary Impact,” is that humans tend to think in moments. Incentive travel program sponsors need only create a handful of memorable experiences to make an indelible positive impression.

In short, some moments of an experience are vastly more meaningful than others, the Heath brothers state. Psychologists have discovered that in recalling an experience, people generally ignore most of what happened and focus instead on a few particular moments – the best or worst moment (known as the “peak”) and the ending. This means the memory of an event is far more favorable than the hour-by-hour ratings participants would provide.

For example, parents who take their children to Disneyland may spend much of the day in long lines under a hot sun. However, if asked to reflect on the experience several weeks later, the ride on Space Mountain (the peak) and the souvenirs purchased at the end of the day will stand out. Everything else will tend to fade.

Companies should think in peak moments and spot the occasions that are worthy of investment. “These extraordinary minutes and hours and days – they are what make life meaningful. And they are ours to create,” the authors state. – *Paul Nolan*



## FEATURE STORY

of the participants, the time period for travel, the length of the program, and the overall goals of the program, said Crystal Zawilinski, sales director for meetings and incentive programs for [Fox World Travel](#), a Wisconsin-based global travel management company.

She recommends using properties that are “conducive to people interacting with one another.” What does that look like? Resorts that are more remote yet attractive. It’s not a bad thing to limit the allure and access to offsite attractions. “I wouldn’t choose a city property in Europe where you can walk out the door and literally be somewhere in one minute,” Zawilinski said.

- **Set clear, achievable goals** – In a SITE survey of program participants, respondents said setting goals that are fair, achievable and in line with company goals are the most essential elements to generating engagement at launch.

SITE reports one of the most common frustrations voiced by program participants is a program that limits the number of reward recipients. One way around this is to build different tiers for qualifying and offer different rewards for more employees. Program sponsors may fear that tiers result in lower performance overall, but industry research shows that when participants are allowed to help set their goals, the majority shoot for the top rewards.

- **Communicate clearly and often** – Most participants receive communication about their incentive travel program once per month. Close to one-third (32%) said they are open to receiving more frequent communications.

E-mail is the main vehicle for delivering updates. However, launching a campaign with a package mailed to your participants’ homes, perhaps with a gift that relates to the destination, allows spouses and other family members to get engaged and provide encouragement to the program participant.

- **Follow up with participants** – Surveying participants after the program provides insights into what they liked and didn’t like, which is invaluable for planning future incentive campaigns.

“We asked questions mainly around satisfaction, organization and interaction. We learned a ton of lessons around logistics,” said Petrone. “Chief among them was to plan activities and meals in advance but leave room for improvisation and spontaneity. We got very positive comments in the area of interaction. The hot air balloon ride was a hit.”

A gift that jogs the memory of the trip can be sent to each participant’s home several weeks after to extend the positive impact.

## Research and Resources

Associations that serve the incentive travel and non-cash recognition industries publish valuable research that can help sell a group incentive travel program to the C-suite. It’s helpful to understand emerging trends, participants’ preferences and key elements of program structure.

Here is some research we leaned on heavily for this report that can help you plan your next group incentive travel campaign.

[The 2022 Incentive Travel Index \(ITI\)](#) is a joint initiative of the Incentive Research Foundation (IRF), the Foundation of the Society for Incentive Travel Excellence (SITE Foundation) and Financial and Insurance Conference Professionals. The 2023 report will be published in October in conjunction with IMEX America.

[Attendee Preferences for Incentive Travel](#), published by the IRF, provides latest views on the future of incentive travel from over 580 professional incentive travel buyers.

[Participant inSITEs](#) is a series of research reports based on an extensive global survey of nearly 1,000 incentive travel reward earners.

- **Think twice about DIY** – Zawilinski said a number of Fox World Travel’s customers reach out when members of their own staff feel overwhelmed by a do-it-yourself effort. The worst-case scenario is having an event go awry due to an unforeseen circumstance and the trip becomes memorable for all the wrong reasons. Professional planners have backups to backups, provide onsite services to roll with surprises, and can provide an array of options that DIYers simply aren’t aware of.

## Planning and Precision

Making the business case for a group incentive travel program starts with knowing the target audience and setting specific goals, whether that is directly related to bumping sales or you wish to pursue softer goals such as increased collaboration, engagement or employee retention.

“It’s the top of the pyramid in terms of reward systems,” said Smith of HMI. “We spend a lot of time with clients on monetizing behaviors and determining how to measure or quantify those goals.”

With planning and proper funding, a group travel experience can create memorable moments that produce 10× ROI – and they can do so year after year. As one program participant told SITE, “Some people go on these and say I’ll never miss another one the rest of my career because it’s so unique and so much fun.” **SMM**



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# Going Beyond Revenue

New research shows that incentive travel drives more than sales.

BY PÁDRAIC GILLIGAN

Pay me and I'll sell.

Recognize me, reward me, celebrate me and I'll sell way more, raising the bar, driving sales to the next level entirely.

Industries ranging from finance, insurance, automotive, IT and pharma clearly recognize the motivational power of recognition. To exploit it, they have developed sophisticated recognition and reward programs, the apex of which is the incentive travel reward.

The verticals listed above have been doing it for decades, so it must be working. Now, we have reliable data to support the contention.

The inSITEs series, produced by SITE Foundation, the 501c3 of Society for Incentive Travel Excellence (SITE), clearly demonstrates how company C-suite executives and the staff that participate on their sales incentives agree that incentives drive sales.

In "Corporate inSITEs," Jim Spradlin, former chief executive officer at GROWMARK, a U.S.-based agricultural co-op, states, "We evaluate the number of qualifiers we have against the sales growth and overall income performance that we achieved in the same period so we can see if the data aligns — and it does."

Staff at GROWMARK, in a separate study — "Participant inSITEs" — highlight overwhelmingly their preference for travel rewards over cash with 81% agreeing or strongly agreeing that they prefer travel rewards over other types of reward.

## Growing More Than Sales

Of course, well designed incentive travel programs do way more than drive sales. Many of these programs are self-liquidating, with the program itself and any costs associated with it paid for by the incremental sales generated by those who participate in it.

The initiative itself is a profit driver, not a cost center. According to 2023 Incentive Travel Index research conducted annually by Oxford Economics for SITE Foundation and Incentive Research Foundation, 70% of companies understand this.

Secondly, incentive travel provides a suitable channel for high-performing individuals to express themselves. In the recent "Participants inSITEs" study, the second highest-ranking variable in terms of motivation to qualify for the program after the trip destination itself was "the challenge of qualifying."

Incentive travel — driving results (sales and otherwise) through the trip of a lifetime — is a highly coveted means of keeping competitive high-achievers engaged and aligned as part of your team: and not ready to jump ship to a competitor.

Thirdly, incentive travel programs drive sales because of the many and varied ways they allow for qualifiers to be recognized as such in front of their peers. The recognition factor is as important as the reward itself.



In the delivery of incentive travel experiences, companies have many ways to recognize and celebrate the achievement of their qualifiers – a private pre-dinner drinks invitation to the CEO’s suite, for example, or the chance to join the CMO’s foursome for a round of golf, or maybe a shoutout or an award at the gala dinner.

### Building Stronger Teams

There are other ways that incentive travel drives desirable outcomes that are not related directly to sales or revenue, but nevertheless crucial to overall company performance. Research now indicates that companies are increasingly targeting these outcomes.

These relate to company culture, values, relationship building, etc. If the outcomes described thus far in this article are tangible and measurable, then these are intangible, harder to calibrate. They are the “soft power” to the hard dollars previously discussed.

Over the years, the Incentive Travel Index has been tracking corporations’ attitudes to soft power versus hard dollars as a key metric for an incentive travel program’s success. Since 2019, intangible factors like fostering relationships, building cross-discipline teams, developing company culture and demonstrating company values have significantly outranked tangible elements like ROI, profit and revenue generation.

Corporations increasingly value the way travel rewards dismantle hierarchies, humanize workplace relationships and place the emphasis on human-to-human (H2H) interaction.

Incentive travel drives sales and builds strong company culture by changing the landscape, altering the conversation and focusing more on the person. When someone is rewarded, recognized and celebrated, they can be relied upon to perform to the highest possible standard and, drive sales. **SMM**

Pádraic Gilligan serves as chief marketing officer at the [Society for Incentive Travel Excellence](#) (SITE). He is also managing partner at [SoolNua](#), a marketing agency working with destinations, venues, agencies, associations and hotels. Prior to founding SoolNua, Gilligan was vice president of Ovation, MCI’s global DMC network, and vice president of industry relations at MCI.

### Incentive Travel Insights

The inSITE research reports provide survey results from incentive travel suppliers, program participants and leaders of companies that use incentive travel as a motivational tool.

[Download the reports here.](#)



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# Ecofriendly Starts With Genuine Intent and Planning

Creating truly sustainable meetings and events requires a combination of on-site and virtual efforts

BY LUIZ MARTINS

Sustainability is now part of many organizations' mantra in 2023, and is impacting every department – including sales and marketing.

For sales and marketing executives tasked with contributing to corporate sustainability goals, there are a variety of approaches, including how sales meetings and marketing events are designed. Here are some tips and tactics for lowering the carbon footprint associated with meetings and events.

## Include a virtual component to in-person events when possible

Throughout the pandemic, the capabilities of virtual meetings continued to evolve to the point where it's common for in-person meetings to include a virtual component.

Sales and marketing executives should consider which of their meetings and events can benefit most from a virtual component – and its positive impact on avoiding additional carbon emissions. Perhaps it's asking Tier 2 prospects to attend

virtually while Tier 1 prospects attend in person; or an event in which international participants tune in virtually vs. expending great time, expense and carbon footprints to attend.

Each person who attends virtually allows for a significantly smaller carbon footprint for the overall event. Each attendee adds to the carbon cost via their travel, transportation, hotel stays, food, waste disposal, marketing materials and many other aspects.

## Make sure your hybrid event is a success

Savings from one year's virtual or hybrid event will be short-lived if virtual participants and meeting planners aren't satisfied with the experience. A range of technology is available to ensure that a company and its sales force actively engage with virtual participants, and that the participants have an opportunity to feel like they're at the event.

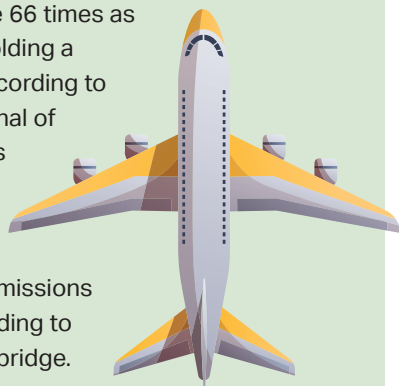
Virtual meeting technology can track attendees across key attributes, such as booth visits, session attendance, content

## Sustainability Facts

Flights alone generate 66 times as many emissions as holding a virtual conference, according to the International Journal of Environmental Studies in 2021.

Hybrid conferences could reduce global emissions by almost 90%, according to the University of Cambridge.

In 2017, the world's largest HR conference, with more than 18,000 attendees, transformed from in-person to virtual and saved the equivalent of 12,463 acres of U.S. forests in reducing carbon emissions.



### Encourage attendees to carpool

For in-person events, provide and promote methods for attendees to share transportation. The customizable apps previously mentioned can allow attendees to connect with each other to organize transportation.

### Source sustainable products for the event

Sustainability opportunities can be easily overlooked. Organizers should work to ensure a fully sustainable event by offering participants items like sustainable utensils and locally sourced food, while also highlighting the event's recycling policies and making recycling bins easily accessible.

### Choose locations strategically

Locations for sales and marketing meetings are typically based on what might impress a customer. Thinking sustainable, consider an exciting venue that just happens to be close to the largest number of your customers, prospects and other participants. Also consider which venues and locations that are available by train vs. airplane.

### When all is said and done, monitor and report

Distribute the event's carbon impact report to attendees and management. It's important to understand the impact of these efforts and reevaluate what worked and what didn't to improve upon it for next time. Go beyond sharing your carbon impact report with just your internal team and your conference attendees. Share your statistics on social media and your website to inspire other corporations to follow your example. **SMM**

Luiz Martins is the chief marketing officer for [6Connex](#), a leading provider of event technology to the professionals working in the sales and marketing events and meetings industries. 6Connex is committed to identifying opportunities to lead sustainability efforts through foundational and innovative programs.

downloads and brand interactions that not only enable meaningful engagement throughout the event, but allow for informed follow-up afterwards.

There are ways to keep sustainability top of mind for the in-person portion of hybrid events as well. Sourcing locally and being mindful of your partners, locations and products can have a great impact on carbon footprint.

### Reduce your paper trail

Whether participants are attending in person or virtually, there's a great deal of paper that can be eliminated. Start by distributing invitations and RSVPs via email. Likewise, send virtual packets detailing all the information people need ahead of time. Use virtual ticket scanning or mobile check-ins on the day of an event. Using hybrid event software, sales meeting organizers can create customizable apps for attendees to store and retrieve all the information they need.

## Additional Tips

Choose an environmentally certified venue.



Source locally, whether it be equipment rentals or food.



Make any materials — sales brochures, presentations and more — accessible to participants via a scan or QR code.



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# Great Experiences Require Great Experience

Partnering with a knowledgeable incentive travel planner can be a difference-maker

BY BARB WARD

You do a number of things as a leader to motivate employees, from effective onboarding, to constructive feedback, to helping make work meaningful. Let's talk about a motivator that's concrete, visible and memorable: [group incentive travel](#).

Recognizing stellar performance is vital. Employee engagement software maker TinyPulse reports that employees who don't feel valued are 34% more likely to leave their job within the next year. Haiilo, makers of an employee communications platform, reports that when it comes to how employers can help employees be successful, recognition ranks higher (37%) than more autonomy (12%), more inspiration (12%) or a raise (7%).

## Tailored Experiences and Current Trends

Travel has universal appeal. According to the Incentive Research Foundation Report (IRF), in 2022, the percentage that found group incentive travel to be "extremely" or "very motivating" increased to 91%, with only 1% stating they did not find incentive travel to be motivating at all. It's hard to find anything that appeals to more than nine out of 10 people!

When planning group incentive travel, the key is to know your audience. Every company has its own culture, and each person and team are unique. The key to success is curation (choosing from many options) and personalization (the ability to tailor that particular option to the person/team). A cruise might be perfect for one team, but too low-key for another. A hike in Costa Rica could be seen as thrilling or intimidating.

Program sponsors should combine the knowledge of their company and their team with some general trends we're seeing in group incentive travel.

**Sustainability** – This matters to the organization from a reputation and recruiting perspective, as well as to the individual.

**Health and wellness** – While this differs from organization to organization, options from "indulgent" benefits like a spa to fitness options like hikes are no longer "nice to have" but instead "must have" components.

**Experience over tangibles** – Participants want to enjoy uniquely memorable experiences versus stuff. This is where working with an experienced planner can make the difference. We planned an annual incentive trip for top performers that included whisking participants away to Havana, Cuba, for a day of fun. This Herculean feat was accomplished with no less than four site inspections and a dedicated team on the ground in Havana to ensure each detail was reviewed and perfected.



**Leisure time** – Top performers want to relax while they are being treated on an incentive trip. The big welcome dinner may be replaced with free time for the top performers to explore the area on their own. We've also incorporated more family/spouse/partner/guest elements.

## 7 Questions to Get Started

Although it can be fun to jump straight to "Let's book a cruise for our top performers!" that approach can backfire. Who do you reward for what? How? Who knows about the program? Is it equitable? Does it fit the company's values?

We've narrowed the questions down to seven:

- What are your goals?
- Who can impact the success of those goals?
- What behaviors do those people need to show that link to success?
- What would motivate them?
- What's the budget?
- How will we communicate the program?
- How will we measure the success of the program?

The most effective way to start an incentive program or refresh it is to find a trusted guide. Like many areas of business, working with a valued partner that brings deep vertical expertise can save time and money by incorporating proven strategies and reliable resources from the start.

Barb Ward, One10 Executive Vice President Travel & Events, brings 28 years of experience to the travel and events industry. For more information about how Barb and the team at One10 can help create a memorable incentive travel experience for your team, email [barbara.ward@one10marketing.com](mailto:barbara.ward@one10marketing.com).

# One10 Incentive Travel

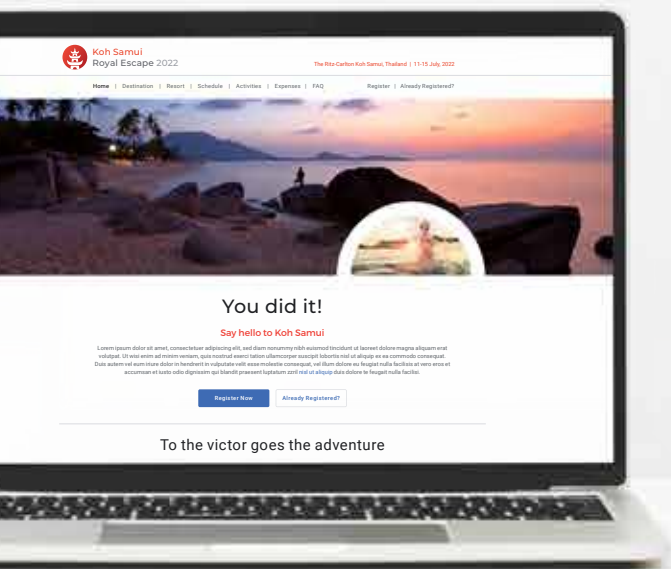
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