



Study on the Corporate Meetings & Incentive Segment in North America

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Introduction

American travelers are staying close to home in the wake of a soft economy and fears of terrorism; these conditions have naturally affected international corporate meeting and incentive travel. However, wise travel planners continue to monitor current levels of this type of business travel, the better to understand the current situation and to plan for a brighter future.

TNS is pleased to present this report to the European Travel Commission as part of an ongoing effort to:

- Provide key insights with regard to the potential Corporate Meetings and Incentive market in the United States and Canada for Europe
- Identify European locations of recent meetings
- Determine how the selection decision process works, including information resources and time frames
- Understand what is important in the selection and what are the essential ingredients to a successful meeting or incentive trip in Europe
- Implications for a practical and operational marketing strategy

The report is organized into two main sections: a discussion of the qualitative findings, with an Executive Summary, followed by a quantitative report, illustrated by tables.

Methodology and Sample Composition

To achieve the desired goals, 450 10-minute telephone surveys were conducted. These phone surveys served as a screener for in-depth follow-up interviews and collected basic descriptive information. Of these, 300 were **US** corporate meeting planners (295) and incentive travel planners (125); all but five incentive travel planners were also corporate meeting planners. In **Canada**, 150 contacts were made with corporate meeting planners (143) and incentive travel planners (73); only seven were incentive travel planners only.

In a second part of the research, 124 surveys were conducted by telephone for more in-depth follow-up qualitative interviews. Of these, 25 were with Canadian planners, 99 were US planners. This meets and exceeds the ETC quota of 25 Canadian/50 US planners.

Each follow-up interview lasted 35-45 minutes. Questions are largely open-ended to encourage as much “full disclosure” as possible. Sample for this portion is composed of respondents from the first phase of the research, a larger quantitative study conducted to “size” the market. All persons interviewed are professional conference organizers, meeting planners, and/or incentive buyers who regularly arrange meetings and incentive travel for their companies inside and outside of North America.

The sample for the US portion of the qualitative survey was drawn from a list of known meeting planners and incentive travel planners. Interviewees for the Canadian portion were derived from a purchased list of meeting planners.

The sample for the US portion of the qualitative survey was drawn from a list of known meeting planners and incentive travel planners. Interviewees for the Canadian portion were derived from a purchased list of meeting planners (see List of Companies in the Appendix).

Caveat: The qualitative research portions of the report describe the process of site selection, reasons for choice, and provides a snapshot of the mindset of meeting and incentive travel planners. However, results are not to be considered statistically reliable because of the small sample size.

Executive Summary

Respondents who plan overseas meetings or incentive travel for their companies most often choose locations in Western or Central Europe, led by the United Kingdom, followed by France. The United Kingdom also leads in incentive travel, but Mediterranean locations (Spain, Italy, Greece) and less-frequently named places (Eastern Europe) make a somewhat stronger showing in this area.

For the future, there is a slight trend towards more activity in Portugal, Eastern Europe, Denmark, and Russia.

The majority reports a decrease in these trips, largely attributed to concerns about safety and security following September 11. The soft economy is also a significant factor. However, a significant minority says the number of trips has increased, thanks to a thriving business or better travel deals. It is fair to assume that Europe will continue to be popular for meetings and incentive trips, because so many respondents say that their markets are there, or that these locations are convenient for clients and subsidiary offices.

Advantages. Another frequently mentioned advantage refers to the overall value of international travel, encompassing: the importance of encouraging an expanded world view, the rewarding side trips, and the feeling that the European experience is exciting, different, and motivating to employees.

Disadvantages. The most frequently cited disadvantages concern the costs (flights, accommodations, food, entertainment), the length of flights and associated complaints (jet lag), and the language barrier in countries outside the United Kingdom.

What They Seek

Assuming that a destination is “on the radar screen” through advertising or sales calls, choice is affected by the following *destination* or *facility* factors (most frequently mentioned among many):

- Convenience/easy access for customers, attendees (*destination*)
- Attractive packages offered/cost comparisons (*destination*)
- Ability of venues to accommodate meeting size (*facility*)
- Up-to-date technology available (*facility*)
- Attractive/different history and culture; country by country characteristics immediately follow this section (*destination*)
- Safety/security (*destination*)

Respondents expect to receive very detailed information from the destination (hotels, CVB, etc.) on the above points. This is particularly important since the U.S. planners are usually unable to personally supervise arrangements in Europe.

Country-Specific Attributes

Since corporate meeting planners and incentive travel planners contract meetings and travel for businesses, they are more attuned to meeting the corporate goals than the tourism strengths of individual countries. On the other hand, they may understand why clients, CEOs, customers, or other decision makers select specific countries, as noted below:

- **London/rest of UK/Ireland:** Usually chosen because of a business relationship (affiliates, branches, headquarters, clients), these areas share the English language, which can make an easier trip – especially for first-time overseas travelers. Each of these destinations generates enthusiasm for scenery, uniqueness, and lots to do.
- **France:** Another destination that is attractive because of the level of business conducted there, France has a more exotic flavor than the English-speaking destinations. Planners note the great food and entertainment that are available plus French history and unique qualities.
- **Germany:** Another destination attractive to businesses, Germany boasts a central location that provides easy access to the Baltic countries.

- **Italy:** Appealing to business travelers, it receives high praise for its history (including religious history) and has a glamorous quality. Rave reviews for food and wine occur as well – with special mention of the Tuscany area.
- **Spain:** Chosen much less frequently, Spain interests some business travelers – **Valencia** is mentioned, along with **Barcelona** and its new convention center. **Madrid's** image is more “*sexy and appealing.*”
- **Eastern Europe:** The area is viewed as relatively inexpensive, particularly **Hungary** and the **Czech Republic**. **Russia** has a more alluring history and St. Petersburg also draws interest. One planner notes that **Latvia** is a central point for Europe, the Middle East, and Russia.
- **Greece:** The country concentrates on its tourist-friendly characteristics. It is viewed as unique and it is easy to enjoy its culture and history with lots of offsite trips.
- **Switzerland:** Appeals to corporate and incentive business and has a “wow” factor for tourism. Switzerland feels romantic (at least when compared to Germany).

Information Sources and Promotions

These business travel arrangers regularly consult a wide variety of information sources, including the Internet, trade publications and other print media, materials from CVBs and tourist offices. They take note of special promotions, but a booking from these promotions occurs somewhat infrequently. However, the information is often cited as being “influential.”

An important gap in the information flow opens between European countries and American travel planners. Almost unanimously, respondents note that they receive nothing in the way of materials, promotions, or other contact from European tourist offices or similar organizations. Several respondents comment that proactive contact from offshore locations is effective in the selection process.

Here is an opportunity to raise the profile of a city, country, or hotel brand by instituting regular mailings and occasional in-person visits to potential American clients. For *meetings*, the qualities to emphasize (as indicated above) are access, convenience, and the ability to provide the necessary levels of quality and technology. For *incentive travel*, access and convenience can be somewhat offset by interesting locations with desirable activities.

The most useful promotional activities by far are site visits — “*Seeing is believing.*” Personal contact in the form of sales calls with hotel or city representatives is an important positive influence. Also popular are workshops where a lot of ground is covered about a country or region.

Essential Ingredients for European Meetings/Trips

As indicated above, there is no substitute for personal contact, preferably onsite in Europe, or via sales/planning visits to U.S. companies. This helps ensure the following:

- *“It’s like anywhere else.”* Make planners feel comfortable that what has been promised will be delivered in terms of quality: service, sleeping rooms, food, meeting space, technology.
- Smooth logistics/no problems, including flights and ground transportation.
- Offer activities that attract Americans: golf, interesting sightseeing, fine dining, and shopping are chief among these.
- Make the experience as easy as possible for U.S. travel arrangers: speak English, provide complete and detailed information, offer advantageous prices, be very available for questions and problems, demonstrate professionalism and a welcoming attitude.

Marketing Strategies

In developing marketing strategies that will entice North American businesses, a number of considerations are important:

Who

- Corporations tend to choose meeting locations based on business needs and price. They do not stray far from areas that are either home to headquarters or branch offices, clients, customers, or have at least some relevance to their business. Incentive travel also takes business needs into account, but with somewhat greater flexibility.
- Further, while the meeting/incentive travel planners have considerable decision-making authority and are responsible for the research and preparation for meetings and incentive travel, they seldom select the general destination – rather it is a CEO, president, senior vice president, department head, task force, client, or customer. However, they exert great influence on the hotels and resorts booked and they may compare costs across cities.
- Thus, overall marketing efforts need to have a dual focus for presenting the attractiveness of destinations – one directed toward high level corporate executives who often broadly select regions for meetings/trips and the other toward meeting/incentive planners.
- The planners, of course, are the ones who need detailed destination information and because they may serve as consultants when choosing regions, their knowledge of (and excitement about) country-by-country points of interest is important.

What

- Non-planner decision-makers such as CEOs, presidents, et al (who are not included among the respondents in the survey), will likely be enticed by the glamorous, entertaining, interesting, and exotic aspects of destinations; the details will likely be assigned to the planners. *One planner in the survey remembers a CEO who had read a travel article about Greece; so she was planning an event there.*
- Because of their consulting role, planners provide important knowledge about each country's costs and comparative advantages.

How

- While determining the best methods to reach non-planners (CEOs, etc.) is beyond the scope of this study, travel magazines, newspaper travel sections, and television are all types of advertising media that help boost awareness.
- Good websites are essential. Half (52% US; 55% Canada) of corporate meeting planners use websites as a source of information; nearly as many incentive travel planners use them as well (46% US; 44% Canada).
- In comparison, about one in five US meeting and incentive travel planners (less than half as many in Canada) consult national tourist organizations for information.
- Of the various types of media, planners verify that they notice promotions in all of the types listed in the qualitative survey but rank *trade publications, print media, and convention and visitors bureau materials* somewhat above others.
- **The most effective attention-getting method, nearly all planners agree, are site visits.** If expense were no object, it would clearly be the way to market. Fam trips that provide a high quality experience build business. Personal contact, sales calls, and workshops are also popular.
- Obviously, since Europe and UK countries are the most frequently selected meetings/incentive destinations, they have achieved a high level of awareness. However, planners perceive a lack of contact or promotional attempts from European tourist offices – the majority says that they receive nothing from Europe while they receive much greater attention from other areas (Singapore, Australia, Bermuda/Caribbean, to name a few). Europe likely falls short of its potential; its locations are less likely to be part of the consideration set without greater pro-active promotional efforts. Various approaches include the above mentioned site visits and various types of personal contact, plus mailings, faxes, visits, tours, and videos as well.

Results of Qualitative Research Among US and Canadian Corporate Meeting and Incentive Planners

Results Of Research: US

To better understand the process and dynamics of location selection and arranging US corporate meetings and incentive travel in Europe, TNS contacted and interviewed 300 senior corporate meeting and/or travel incentive planners by telephone. Among these respondents, 99 agreed to also provide follow-up in-depth information. This section relies primarily on observations from the qualitative interviews.

Planners in this survey hold many titles: a variation of Meeting Coordinator or Events/ Travel Manager arose most frequently among the group interviewed. Others included are: Marketing Director/Manager, CEO or President, COO, Vice President, Executive Director, Meeting Coordinator/Events Manager, Travel Manager Project Manager, Department Head, Director of International Sales, important clients.

Respondents arrange meetings in international locations; many coordinate both meetings and incentive travel. However, about half represent companies that provide no incentive travel at all. Conversely, interviewees who say they arrange **only** incentive travel are few.

Since incentive travel planners are essentially a subset of corporate meeting planners – of the 300 total quantitative interviews, only five US incentive travel planners were not also corporate meeting planners – results for both groups are very similar.

One of the findings is that event planners seldom choose the destination. While event planners do most of the research and the subsequent work, the final destination decision is likely made elsewhere in the company, most often at the senior vice-presidential level, the president, or the CEO. Department heads and committees also frequently choose the destination. The planners themselves and clients are named less frequently.

Where They Go ...Been There (Past):

Companies that hold events or incentive travel in Europe typically visit multiple destinations. In the past three years, 80 percent have selected more than one location for meetings and/or incentive travel.

Bearing in mind that destinations vary, the most recent European corporate meeting or incentive trip was likely held in the United Kingdom. France follows; Ireland, Germany, Italy, and Spain form a third tier.

Similarly, of the European countries listed on the qualitative survey, the United Kingdom attracts the most **meetings business** followed by several countries in Western and Central Europe. France, Germany, Italy, and Switzerland lead in Europe, with Spain and the Scandinavian countries as a group not far behind.

The United Kingdom also leads in **incentive travel**, but Mediterranean locations (Spain, Italy, Greece) and less-frequently named places (Eastern Europe) make a somewhat stronger showing in this area. Companies that handle both types of business travel often arrange incentive trips in the same locations they pick for meetings.

Thinking About...(Future)

Plans for the future look very much like the destination patterns previously selected, as above. There is a slight trend towards more activity in Portugal, Eastern Europe, Denmark, and Russia.

Volume of Offshore Meetings

As might be expected, companies are most likely to report either *no change* in offshore meetings (40%) or a *decrease* (38%) rather than an *increase* (21%). However, the proportion noting an increase is relatively large considering the world events of the past two to three years. Meetings business has grown because some businesses are thriving, some participated in mergers/acquisitions, and a few take advantage of better travel deals.

Reasons for decreased volume in offshore meetings are predictable. *Fear of terrorism* and *other issues related to 9/11* dominate the reasons for decreased volume (three-quarters cite these types of reasons), but the *economy* is also a significant factor (about two in five). A few potential attendees have *switched their business focus to North America* and others simply do not want to take *extra time away from their homes and offices*. One respondent represents a company where, *“Our business picked up and we seem to have less need to travel.”*

Another participant noted that his company has economized by holding even more meetings than previously, but they are smaller and held at drive-to rather than fly-to places. This drive vs. fly phenomenon is echoed worldwide by both leisure and business travelers, as reported in other TNS studies.

Advantages/Disadvantages of European Countries

To help answer the question: *Why do US companies hold meetings or arrange incentive travel in Europe?*, the survey probed for advantages and disadvantages.

Advantages

Several people pointed out that they simply need to be in Europe to satisfy market demands and to interface with colleagues and clients located there.

Perhaps the most frequently mentioned advantages refer to the overall value of international travel, encompassing: the importance of encouraging an expanded world view, rewarding side trips, and that a European experience is exciting, different, and motivating to employees.

Other perceived advantages:

- Europe is centrally located with convenient transportation for clients, company offices
- Europeans seem eager for the business and are more meeting oriented
- Hospitality industry is largely English-speaking
- Some countries in Southern Europe are less costly

For incentive travelers, a trip outside the United States or to an exotic location provides a greater motivation to earn one.

“European destinations are very desirable and motivating. These locations are big drivers for our insurance agents to do well.”

Disadvantages

The most frequently cited disadvantages concern the costs (flights, accommodations, food, entertainment), the length of flights and associated complaints (jet lag), and the language barrier in countries outside the United Kingdom.

“We get better rates in other parts of the world.”

“You have to really negotiate and make sure you get what you agreed on.”

Recent events also contribute to a reluctance to leave the U.S. Fears of terrorism and unsettled conditions post-9/11, combined with related unpredictable travel arrangements, tend to deter overseas business travel.

Other disadvantages include:

- Difficulties with financial conversions/exchange rates
- Making arrangements is more complex than for U.S. destinations/not able to oversee arrangements in person
- Technology and infrastructure not up-to-date

“We have to go to the trouble and expense of shipping our own materials (because it is difficult to obtain them there).”

- Learning different terminology/customs
- Lack of hotel space for big groups
- Distance and time away from home/office
- Service/support not up to our standards, therefore, *“We’ve been heading to the South Pacific.”*

Finally, one respondent took on the mantle of the kind of American traveler that probably should stay home. She found her European destination to be *“Dirty and rustic. In the middle of a...garden or castle, there’s an old, not-clean feeling. Move it here, call it Disneyland and it’d be clean and new.”* While this viewpoint is probably rare, it is as well to bear in mind that some Americans tend to like clean, modern surroundings coupled with an appreciation of historic sights.

Destination Selection: The Process

Most of these planners are free to consider meeting destinations on an individual basis, taking various factors into consideration; a minority—about one-fourth to one-third, are constrained by a pre-determined list. Lists are determined by convenience to markets, location of trade shows, and preferences of senior management.

Somewhat fewer than half the respondents begin the process by selecting a European country first; the majority has already decided on a specific city or region within a country.

Narrowing the decision process depends largely on the following factors (country-specific advantages are identified in the next section), either by destination issues:

- Convenience/easy access for customers, attendees
- Attractive packages offered/cost comparisons
- Access to a major airport
- Attractive/different history and culture
- Safety and security

Or by facility issues:

- Ability of venues to accommodate meeting size
- Available venues for specific dates
- Available technology
- Tied in to specific event(s) at location

Focusing on the last meeting or incentive trip destination, respondents offered reasons for that selection. As indicated above, these again center around convenience for clients or customers, as well as attendees. Other mentions:

- English-speaking
- Interesting/fun places to visit nearby
- Recently opened up/unique destination (Russia)
- Like to return to same place every time (Ireland)

- Good packages
- Favorable airfares, other costs
- New, state-of-the-art venues and availability of necessary technology (specifically, Barcelona’s convention center)
- It was the turn of branch office in selected country
- Unspecified internal company needs:

“Based on our priorities and issues of concern – we try to schedule all of the areas in a region, then book. I went to seven countries on my last round of meetings.”

- Influence of company officials for their own reasons:

“Wherever our CEO thinks we should go, we set up meetings. For one recent one, she read a magazine article and decided she wanted a cruise around Greece.”

- Safety concerns

“Since 9/11 we consider how safe our clients will feel in different parts of the world. (For the last meeting) Germany felt more neutral than other areas.”

Almost unanimously, respondents say they were pleased with their most recent European experience, and would return to that destination again, barring drastic changes in costs, availability, or safety. Again, this is often influenced by convenience for meeting attendees. (Note: larger meetings are planned months/years ahead, so returning to same destination can take several years). Exceptions are mostly incentive planners, who want to vary the travel experience each time.

Country-Specific Reasons for Selecting Destinations

European countries and the UK have diverse histories and, as a result, each holds certain advantages over competitive destinations. Many US corporations have overseas locations, employees, and/or clients that offer new and exciting places to visit, as listed below:

- **The UK:** The UK receives accolades as a place of interest, especially for “beginner” overseas travelers. The language helps a lot and Britain is recognized for theatre, shopping, good side trips, good facilities, and it has a bit of a “WOW” factor. Of course, because these respondents plan corporate meetings, many book Britain because they have business relationships (subsidiaries, manufacturing plants, clients) there. They consider it an “easy” place to book and good for US visitors.

- **London:** As noted for the UK and Britain, London is a headquarters, branch, or affiliate of several businesses that hold meetings there. Further, many consider it to be a convenient, easy to get to, central location and deem it a strong financial area. From a tourism perspective, the language is a plus and there is “so much to do.”

“London is the New York of Europe.”

“There is always some event occurring and we were able to go to Wimbledon.”

“London has a lot to offer as a city and it is a nice change of scenery for US residents.”

- **Scotland:** Not chosen as frequently as Britain or London, it shares the language advantages, is perceived as easy to visit, has lots of sights to see, unique, and has luxury accommodations available. One CEO specifically requested Scotland for a corporate meeting.
- **Ireland:** In addition to business reasons for visiting, the country is perceived as safe, economical, and friendly with good weather and many activities. **Dublin**, specifically, is cited as being cheaper than other parts of Europe. Ireland stands on its own, but draws from the strengths of the UK:

“Ireland was our client’s choice; he had not been there in 10 years and wanted to visit again.”

“We had been to Scotland, liked it, and wanted someplace similar – so we chose Ireland.”

“We visit Ireland annually. We like it so much that we do not want to go any place else. It is a great location with golfing and things to see.”

- **France:** Home to several corporations and/or their branches, France is frequently chosen for corporate meetings because of its popularity, modern facilities with up-to-date technology, and convenient location. Meeting planners’ clients may specifically request France and it is sometimes selected because of its value. Attracting tourists, visitors consider France unique with lots of history and things to do:

“France is more exotic than domestic locations; it is exotic and beautiful.”

“There is great food and entertainment.”

“It is unique, has lots of history, and lots to see and do.”

“Paris is where many air shows are; we make landing gear, so we go where our clients go.”

“We choose France because of what it has to offer. Monte Carlo, specifically, is a luxurious, exotic, upscale area.”

“We got a fabulous deal; it is less expensive than the US.”

- **Italy:** Frequently selected for business reasons, Italy is convenient for employees in European offices. Further, planners praise it for its tourism characteristics:

“Italy is scenic, quaint, and exotic.”

“Our boss chose it; he is an ‘Italiophile.’”

“The Catholic Church and its history is so interesting in Italy.”

“Italy is a change of environment and adds glamour. We are able to get more people to attend.”

“The food and wine are exceptional; the wineries in Tuscany are wonderful.”

“Everyday is an adventure.”

“It is a great place to bike each day.”

- **Germany:** Similar to most of the other destinations selected by these planners, business reasons predominate for Germany, with several citing headquarters or plants there (including a trade center in Hamburg), general business reasons, and/or customer/client preferences. Planners recommend its central European location with “*opportunities to reach the Baltic countries.*” Safety is an adjective used with Germany and one planner remembers its “*good beer.*”
- **Spain:** Spain is occasionally selected for corporate headquarters or other offices; **Valencia** was specifically mentioned. **Barcelona** claims a new state-of-the-art convention center which helps draw meetings that require advanced technology, as noted earlier. **Madrid** appeals to those seeking a different experience:

“Madrid’s culture is sexy. It is a different and appealing place to go.”

- **Eastern Europe:** **Russia**, now open to US visitors after being inaccessible for such a long time, provides a unique international flavor, excitement, and appeal:

“Russia has St. Petersburg and such a grand history.”

Hungary’s attraction is twofold: planners consider it to be very economical (“*a great deal*”) and its relatively new openness to the West gives it a different aura (“*it offers a different perspective on life;*” “*it offers a new atmosphere, different food, and a different culture*”).

The Czech Republic also receives acknowledgement for reasonable costs and good deals. Similar to Hungary, comments such as “*quaint, an opportunity to see new areas, and a new culture*” are attributed to it.

One planner recognizes **Latvia** as a central point for Europe, the Middle East, and Russia.

- **Greece:** Less relevant as a corporate business destination, Greece’s planners concentrate on its numerous tourist-friendly characteristics:

“Greece offers something different; it is marvelous for attendees.”

“It is easy to enjoy its culture and history; there are lots of offsite trips, lots to learn, and is very interesting.”

“Our CEO decided she wanted us to go there after reading an article about it.”

- **Switzerland:** Switzerland attracts business and incentive business. Some business headquarters are there; sometimes it is a client selection. It is also enticing as a destination, and at least one planner thinks that it wins in a head-to-head comparison with Germany:

“Switzerland has a ‘WOW’ factor.”

“Switzerland is more romantic (than Germany).”

- **Other European Countries:** Other European countries host a few meeting/ incentive travelers. Planners note that **Belgium** is recognized for supporting business activities with its convenient, high-quality hotels; **Denmark** is home to some corporate offices; clients have selected **Austria**.

Information Resources and Other Influencers

Special Promotions

From a list of several information sources, respondents indicated from which they have seen or heard about special promotions, and whether a booking was made as a result of a specific promotion. Results indicate that they are aware of and consult most of the sources listed, and have noticed promotions in all of them, with *trade publications*, *print media*, and *convention and visitors bureaus* slightly ahead of others.

Awareness does not always translate into bookings, however. Planners name *trade publications* as the category most often resulting in an actual sale of a featured promotion, followed by *CVBs*.

“We are influenced to a certain extent. When a new facility or area advertises, we begin to think about them.”

More About Useful Information

When choosing a destination, several kinds of information are deemed important and several respondents emphasized that they want a lot of detail. Many are obvious, such as:

- Size and infrastructure of the facility
- Meeting room layouts/floor plans
- Proximity to airports and area attractions
- Costs
- Hotel accommodations other than meeting site
- Safety/security/political situation. This type of information likely receives more attention now than before 9/11

Other desirable information includes:

- Available venues for offsite meetings
- Traffic flow
- Flight availability
- Ground transportation
- Weather
- Construction in the facility or destination city
- Names of people with whom planner will interact
- Concierge, key people that speak English
- Information on customs and behavior
- Community events, entertainment
- Activities for attendees and significant others/tour options

They expect to get this information from multiple sources, similar to their promotional research mentioned earlier. Much of the needed data is found on *Internet sites* (destination, CVB, hotel, etc.); *individual hotel representatives* and *convention and visitors boards* are frequently mentioned. Less frequently cited are: *the federal government, personal experience, networking with other planners, trade publications, travel guides, and internal company sources*. Some companies rely almost entirely on third party planners.

“We use a third party planner and they supply us with all of the needed information. (Promotions and other offers) do not come directly to me—the third party planner receives everything first and suggests what’s best for us.”

“Site Visits are the Best”

In seeking information and help with European destinations, respondents believe they would be well served by several promotional activities, including *site visits, workshops, and sales calls*. Mention of *facility or site visits* dominates this discussion – almost everyone calls it most useful - but expense can be a downside. Personal contact with hotel or city representatives is an important positive influence.

“Seeing is believing. I need to see the property, and Europe is no different than anywhere else. I like to see where we go and I want to meet the hotel service people. It’s the best way.”

Also popular are *workshops* where a lot of ground is covered about a country or region. Many properties are reviewed, making this an efficient use of time, and information can be shared in person. Other options:

- *One-on-one meetings/personal contact* with the site people, enabling planners to streamline meetings to meet their individual specific needs. For some, this type of contact “stands in” for site visits.

“Sales calls—that is the cheapest way to learn about where we are going, because someone comes to you.”

- *An extensive resource guide* including day trips, emergency numbers
- *Mini trade shows* that are more “personal” and geared to specific industries
- *Sales kits and brochures* with solid information, including city guides
- *Trade publications/advertisements*

Doing More from the European Side

European tourist offices appear to fall short of their potential to encourage meetings and incentive travel. A surprising majority of respondents say they receive nothing in the way of promotions or ongoing contact. This is partly because planners are accustomed to dealing more directly with local representatives, but also because of a perceived lack of this type of service from the tourist offices.

“Nothing. We have to search them out. I have never been contacted by a European Board, company, or hotel. We have to look for them.”

Often, planners obtain information from tourist offices only after the destination decision is made. The gap in contact reveals a potentially serious weakness: pro-active promotions and information may or may not result in a booking, but at least, they place a destination “on the radar screen”:

“They send information about events in their area/offer discounted rates or upgrades. We are influenced by these things, but cannot depend entirely on them for booking.”

On the other hand, when European organizations reach out, it can work very well for them. As one respondent says, *“Fam trips and hosted buyer programs show that they really want our business. We like a certain level of special treatment. When we get it, we book.”*

The obvious conclusion from this topic is that any attempt from European sources to increase contact would be noticed and appreciated. These could take the form of mailings or faxes (advertising, promotions, specials), one-on-one visits, or hosted tours of an area/facility. Planners would like to know about special events, including sports events, other trade shows or conferences in the area, and to receive videos of the property and surrounding area.

Another respondent commented that marketing efforts from Europe are not only scarce, they could benefit from a more holistic approach. For example, she mentioned hearing only from hotels, rather than a complete package that, for example, could combine offerings from an airline, hotel, and CVB.

Outside Europe, destinations “go one better”: In addition to needing more ongoing information, Americans like to feel that they are welcomed and wanted—an attitude often projected better in other areas of the world than in some European countries. Further, they express concern that their European contacts do not always provide an honest assessment of their locations, especially concerning security. A sample of illustrative observations includes:

- *Singapore offered an imaginative and effective promotion accompanied by gifts of art and jewelry; it is also described as a good example of gracious hospitality at reasonable prices.*

- *Australia is judged to be more warm and welcoming, and it doesn't "tack on" lots of little extra charges.*
- *Bermuda and the Caribbean are assiduous in their attentions (especially to East Coast companies), regularly sending out high quality promotions and sales kits.*
- *Many European locations lack hotels of sufficient size for many meetings; a building program will help attract larger groups.*

Effect of the Euro

The inception of the Euro has had little effect on destination choice, according to most respondents. A minority believes that prices have risen, forcing them to look at the South Pacific or elsewhere, but other factors besides the Euro contribute to this. On the plus side, for companies that need to be in Europe, it is easier to deal with one currency than several.

Overall, planners believe that the need to be in a specific country or city outweighs an unfavorable exchange rate. Plus, since many meetings are planned as much as two to three years ahead, exchange rates become moot, since they are likely to change. In these circumstances, price sensitive companies may work harder at getting a good deal.

"Our (destination) choices are market driven, not financial."

"If the amenities offered are worth it, and planning is going well, (an unfavorable) exchange rate doesn't matter."

Lodging and Activities

Optimal places to stay differ somewhat between corporate meetings and incentive trips. *Business meeting planners* almost universally choose downtown hotels first, followed by a group of venues for which the number of selections is equivalent: resort hotels, suite hotels, airport hotels, convention centers, and golf hotels. Cruise ships and suburban hotels form the next tier. Residential conference centers and gaming facilities place lower.

Incentive planners seek resorts first, followed by golf hotels. Downtown hotels and cruise ships are also popular selections; somewhat fewer choose gaming facilities and suite hotels. Airport hotels, convention centers, suburban hotels, and residential conference centers draw a few scattered votes.

Note: the above discussion should be read as directional only; the sample is too small to draw reliable statistical conclusions.

Activities. Of course attendees of offshore meetings participate in outside activities, combining business with pleasure. Again, meeting attendees and incentive travelers select somewhat different activities for enjoyment, but golf ranks as the most important for both groups. Generally, planners of business meetings place more emphasis on dining while incentive planners focus more strongly on shopping and family-oriented activities.

For **corporate meetings**, planners primarily seek: *golf, dining experiences, sightseeing, museums, sporting events, short cruises, various outdoor/water activities, team building exercises, nightlife, spas/fitness, cooking classes, shopping, and events unique to the area.*

Incentive travel priorities are somewhat different: *golf, lots of tours, spas/fitness, tennis, outdoor and water activities, theme parks, shopping excursions, scavenger hunts, and road rallies.* Interestingly, *gambling* is mentioned by only a couple of respondents.

Planning Specifics

Funding for offshore travel is usually generated within the department involved or from the corporate treasury. Somewhat less often, a client pays for the meeting. For incentive travel, the funds are often raised through sales and commissions of the employees.

Time Lines

Because it varies so widely, it is almost impossible to quantify the time a decision is made to hold a meeting/incentive trip to the time the destination is chosen. Answers to this question range from two to three days to 18 months.

A similar gap appears between the destination selection and to the time the trip actually occurs. Three months to one year encompasses most responses—rarely sooner, occasionally longer.

Essential Ingredients for a Successful European Meeting/Trip

Meeting and travel planners want their events to go smoothly, meet expectations, and provide fulfilling experiences for attendees. More specifically:

- As one participant mentioned, planning for Europe is like anywhere else: Make clients feel comfortable that what has been promised will be delivered in terms of quality: service, sleeping rooms, food, space:

“First class service from an attentive hotel staff that understands your needs. That guarantees a good meeting.”

- Smooth logistics/no problems, including:

- Flights and ground transportation
- Accessibility/ease of getting there
- Good English-speaking contacts at site to overcome communications problems

“They do things differently over there, both culturally and business-wise. It takes getting used to and adjusting to their way in order to get what you want.”

- High-end technology needs are understood and met
- Attractive/interesting location, with desirable activities
- A “fun” local event happening at the same time as the meeting (festivals, sports, etc.)
- Knowledgeable people to help with planning so attendees are not tired/over-programmed
- Weather
- Costs/Value
- Attendees receive luxury/VIP treatment that is not available to the general public
- In a reference to holistic planning, a respondent offers the following example of packaging that makes planners’ lives easier:

“For example, in Orlando, Disney put the whole trip together for us. When a location chips in and helps with the arrangements, we usually save money for our clients.”

Results Of Research: Canada

Representatives of Canadian firms offer information and opinions that parallel those of American respondents, based on 150 total corporate meeting/incentive travel planners, 25 of whom also agreed to provide follow-up in-depth information. Their observations follow:

- Again, incentive travel planners are essentially a subset of corporate meeting planners – of the 300 total quantitative interviews, only seven Canadian incentive travel planners were not also corporate meeting planners. All of the in-depth interviewees' companies planned for meetings and conventions; none indicated incentive travel.
- Titles of the Canadian participants range more widely from the Americans' largely travel-related titles, including engineers, sales department personnel, and administrative people. This could reflect smaller companies with more employees who multi-task.
- Planners in Canada (from the in-depth interviews) were most likely to report a decrease in the volume of offshore meetings (40%) in the past three years. Many report an increase (32%); they were less likely than their US counterparts to report no change (28% vs. 40% US).
- While Canada respondents cite the aftereffects of 9/11 for decreasing offshore volume (the leading concern in the US), they were as likely to blame the economy or business cutbacks. However, similar to the US, most increases were justified by business expansion.
- Like the American respondents, they agree that cost, time, and cultural differences are important factors when considering business meetings overseas, but are secondary to the needs of serving customers and interfacing with affiliates in Europe. Several Canadians are focusing more on their North American business opportunities, but it is likely that those who have overseas potential will increase travel when/if security fears are allayed and the economy improves – especially the fortunes of each individual company.

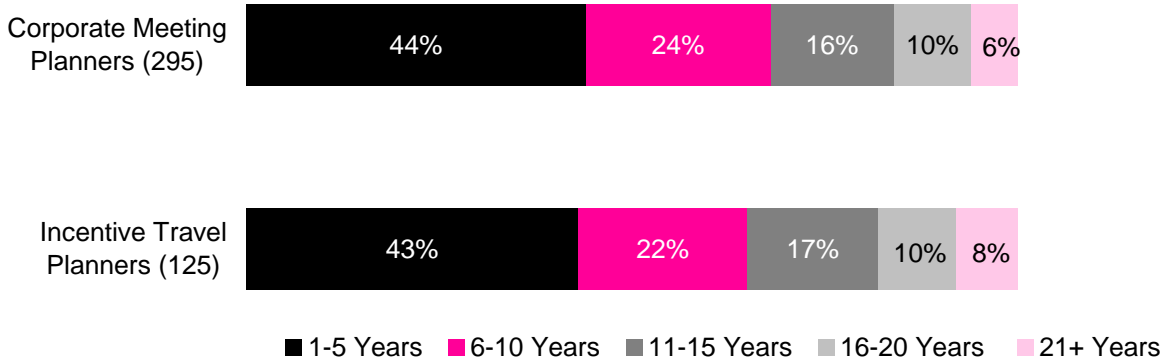
“If we need to go there for business, costs and unfavorable exchange rates do not have an effect on travel.”

Quantitative Description of Corporate Meeting Arrangers and Incentive Travel Decision Planners—United States

Number of Years in Travel Planning Role

Because most incentive travel decision makers also double as corporate meeting decision makers (only five incentive travel planners are not also corporate meeting planners), their demographic descriptions are similar. Each averages nearly ten years in their respective roles (9.3 years for corporate meetings and 9.6 years for incentive meetings).

FIGURE 1
NUMBER OF YEARS PLANNING MEETINGS OR INCENTIVE TRIPS (Q2)
US RESPONDENT BASE NOTED IN LEGEND



SUMMARY: AVERAGE/MEAN NUMBER OF YEARS AS PLANNER		
	Corporate Meeting Planners	Incentive Travel Planners
Average	9.3	9.6
Median	6.3	7.5

Number of Meetings

Often working for large corporations, these corporate meetings planners arrange nearly fifty (48.9) meetings each year, on average, and over seventy-five (75.2) in the past three. Incentive trips are less common in comparison.

FIGURE 2
NUMBER OF CORPORATE MEETINGS/INCENTIVE TRIPS (Q3)

	Mean	Median
Base: US Respondents	300	300
Corporate Meetings		
Average in past year	48.9	16.5
Average in past 3 years	75.2	31.7
Incentive Trips		
Average in past year	17.7	2.9
Average in past 3 years	25.2	6.3

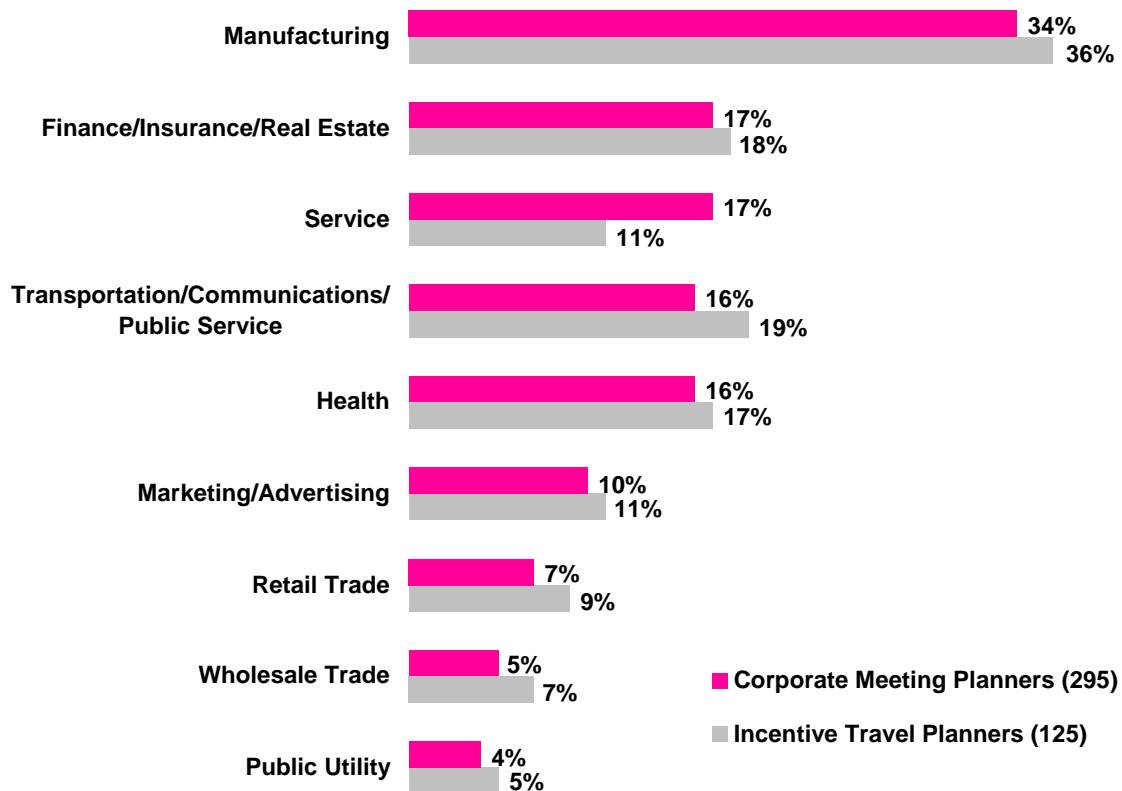
Industries Organized

Meetings (34%) and **incentive travel planners** (36%) most commonly cite *manufacturing* as their industry classification. For **corporate meetings**, *finance/insurance/real estate* (17%), *service* (17%), *transportation/communication/public service* (16%), and *health* (16%) follow at a distance. Fewer are involved with *marketing/advertising* (10%), *retail trade* (7%), *wholesale trade* (5%), and *public utilities* (4%).

Industries heavily involved in **incentive travel** roughly mirror those for corporate meetings, as might be expected given the high degree of overlap in job function. Of note, however, is the smaller percentage of incentive travel planners (11%) represented by the service sector than of corporate meeting planners (17%).

FIGURE 3
TYPES OF INDUSTRY FOR WHICH MEETINGS/TRIPS ARE ORGANIZED (Q5)

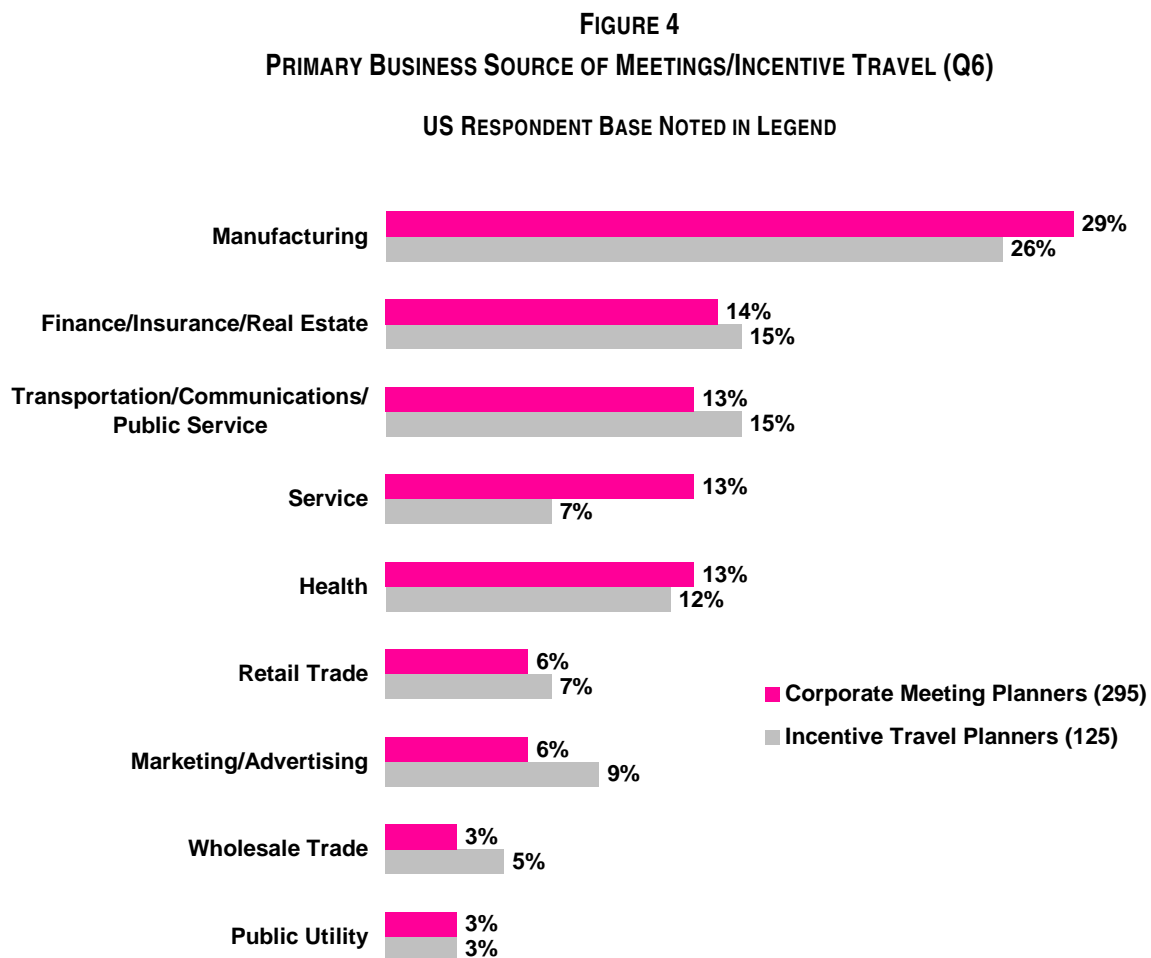
US RESPONDENT BASE NOTED IN LEGEND



Business that is Primary Source of Corporate Meetings

The *primary* source of corporate meetings and incentive travel planning retains the same order from lowest to highest as all corporate meetings and/or incentive travel planning: *manufacturing* requires the highest percentage of corporate travel arrangers and incentive travel planners; *utilities* require the fewest.

The rate at which each industry is represented serves as a starting point to understand which markets are most cost effective for visitors and conventions bureaus to target. This decision must be based on the size of the market coupled with the varying cost of reaching sizable segments of a specific market once it has been identified.



Average Number of Meetings/Trips Per Group Size

The number of attendees to **corporate meetings** varies from two to over 1,000, but more than half (56%) consist of 50 attendees or fewer. Similarly, slightly under half (46%) of **incentive trip** groups include 2 - 50 people. For either form of corporate travel, about one trip in twenty (5%) includes over 1,000 attendees.

FIGURE 5
AVERAGE NUMBER OF MEETINGS/TRIPS PER GROUP SIZE (Q7)

	Corporate Meeting Planners		Incentive Travel Planners	
	Proportion of Total	Average # of Meetings Per Category	Proportion of Total	Average Per Category
Base: US Respondents	287	287	100	100
NET 50 OR FEWER*	56%	27.3	46%	8.1
2 to 10 people	15	7.2	12	2.1
11 to 25 people	19	9.5	16	2.7
26 to 50 people	22	10.6	18	3.2
NET 51+*	44	21.8	54	9.6
51 to 100 people	14	7.1	22	3.8
101 to 300 people	13	6.3	18	3.2
301 to 500 people	7	3.2	9	1.5
501 to 1,000 people	5	2.6	1	.2
1,000+ people	5	2.6	5	.9
Total Number of Meetings*	100%	48.9	100%	17.7
* May not sum due to rounding				

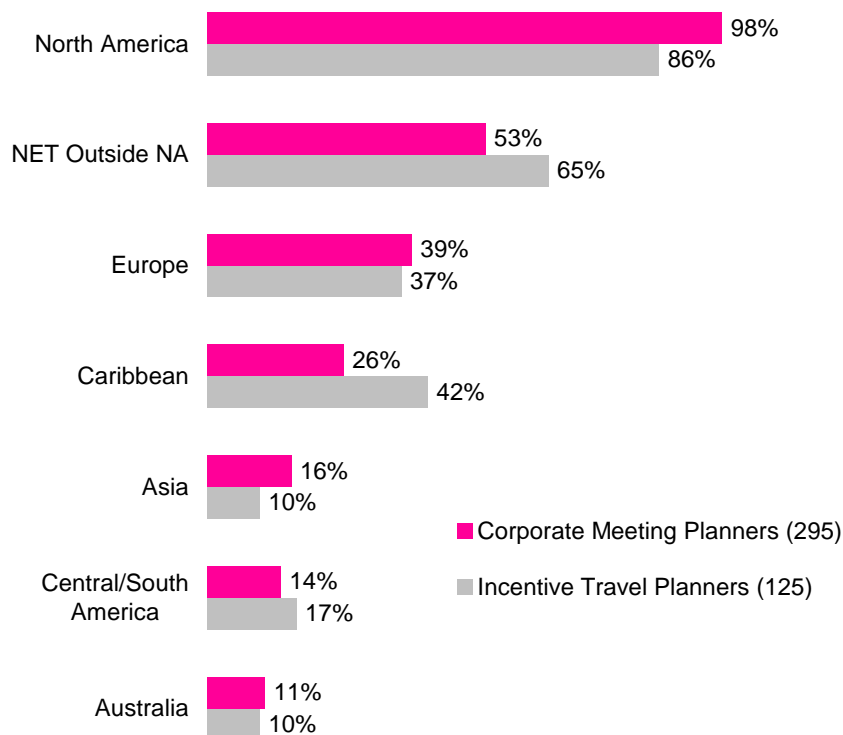
Corporate Meetings and Incentive Trip Locales

Nearly all (98%) US corporate meeting planners have planned at least one trip within North America in the past five years; slightly less (86%) for incentive planners. International travel is used more extensively for incentive travel (65% vs. 53%).

For corporate meetings, planners most commonly choose *Europe* (39%). However, for incentive travel, *Europe* (37%) ranks behind the *Caribbean* (42%). While still competitive for corporate meetings (26%), the *Caribbean* is identified less often, in large part because company locations are more likely to be present in Europe, particularly for major manufacturers, compared to the Caribbean.

FIGURE 6
DESTINATIONS OF CORPORATE MEETING AND INCENTIVE TRIPS IN PAST 5 YEARS (Q9)

US RESPONDENT BASE NOTED IN LEGEND



Specific Countries Selected in Europe in Past Three Years

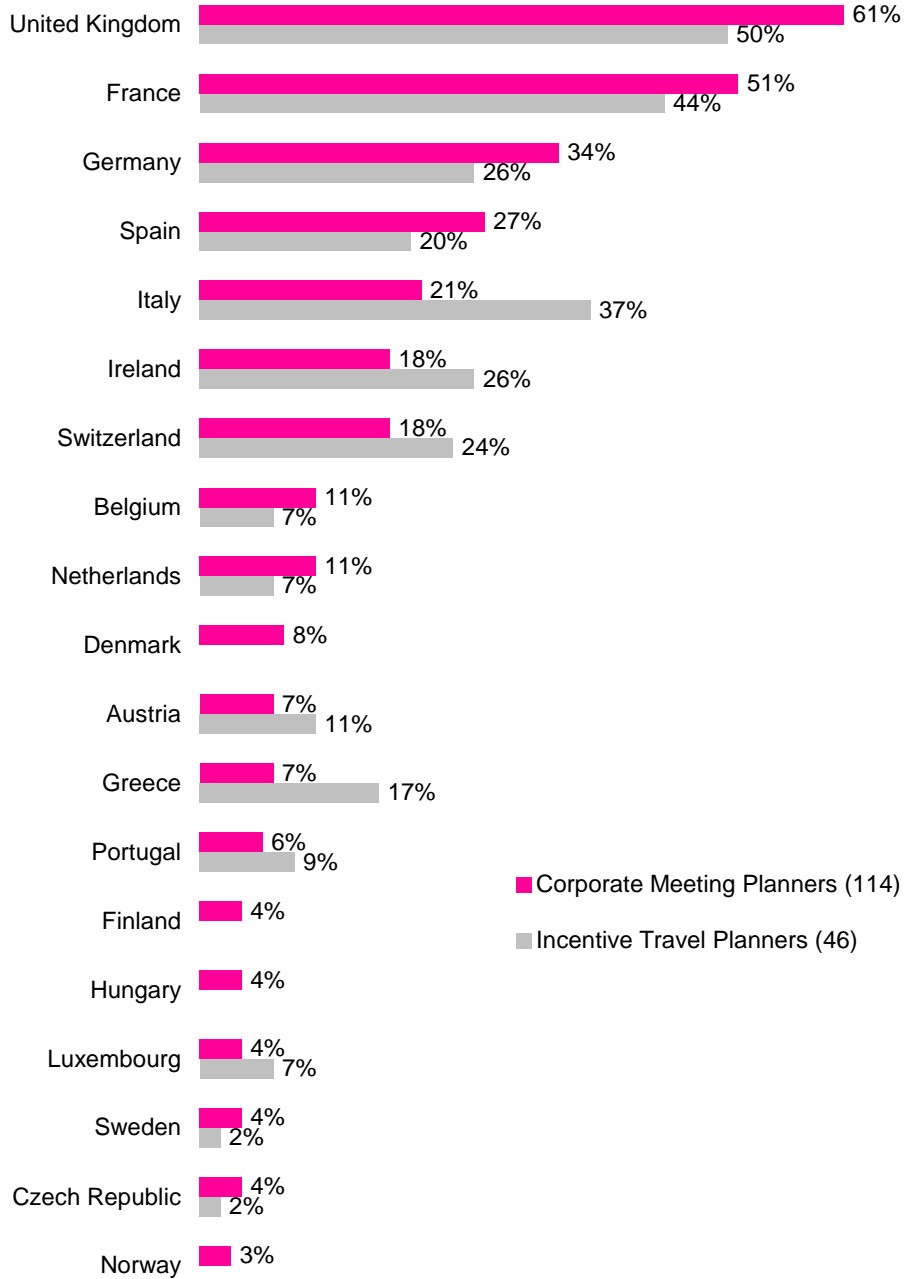
The UK represents the destination that both **meeting planners** (61%) and **incentive travel planners** (50%) are most likely to have selected at least once in the past three years, followed by France (51% and 44% respectively).

For **corporate meetings**, *Germany* ranks third (34%), followed by *Spain* (27%), *Italy* (21%), *Ireland* (18%), and *Switzerland* (18%).

As destinations for **incentive travel**, *Italy* (37%) and *Greece* (17%) prove more popular than they are for corporate meetings. As these locations are better known for their leisure travel allure, they likely serve as more powerful incentives for corporate employees. Similarly, *Ireland* (26%), *Switzerland* (24%), *Portugal* (9%), and *Luxembourg* (4%) represent destinations where incentive travel is more common than corporate meetings.

FIGURE 7
EUROPEAN DESTINATIONS OF CORPORATE MEETINGS
AND INCENTIVE TRAVEL IN THE PAST 3 YEARS (Q10)

US RESPONDENT BASE NOTED IN LEGEND



Future Plans for Europe

Differences appear in future plans between the two types of travel:

- Three corporate travel planners in five (61%) are considering **corporate meetings** in *Europe* in the next three years; roughly two-thirds of those (39%) have already made the requisite bookings.
- **Incentive travel** planners are less likely to have selected a *European* destination. Only slightly more than a third (37%) of incentive travel planners are currently considering *Europe* as a destination for incentive trips and most of those (35%) have already made the associated bookings.

The higher rates of **corporate meeting travel** under consideration in Europe probably result (at least in part) from regularly scheduled corporate meetings associated with firms that have operations on both continents. On the other hand, the presence of corporate centers plays a smaller role in the decision of travel destinations for **incentive travel**. This is an important finding for marketers because it implies a greater ability to influence destination selection. Because the specific location of **incentive travel** is more discretionary, marketers can exert greater influence on it.

FIGURE 8
CONSIDERING/CONFIRMED CORPORATE MEETINGS/INCENTIVE TRAVEL
ANYWHERE IN EUROPE IN THE NEXT 3 YEARS (Q11)

Base: Corporate Meeting Planners (and responded to question)	116
Considering a Corporate Meeting in Europe in next 3 years	61%
% of above where corporate meeting is confirmed (Base=71)	39
Base: Incentive Travel Planners	125
Considering Incentive Travel in Europe in next 3 years	37%
% of above where incentive trips is confirmed (Base=46)	35

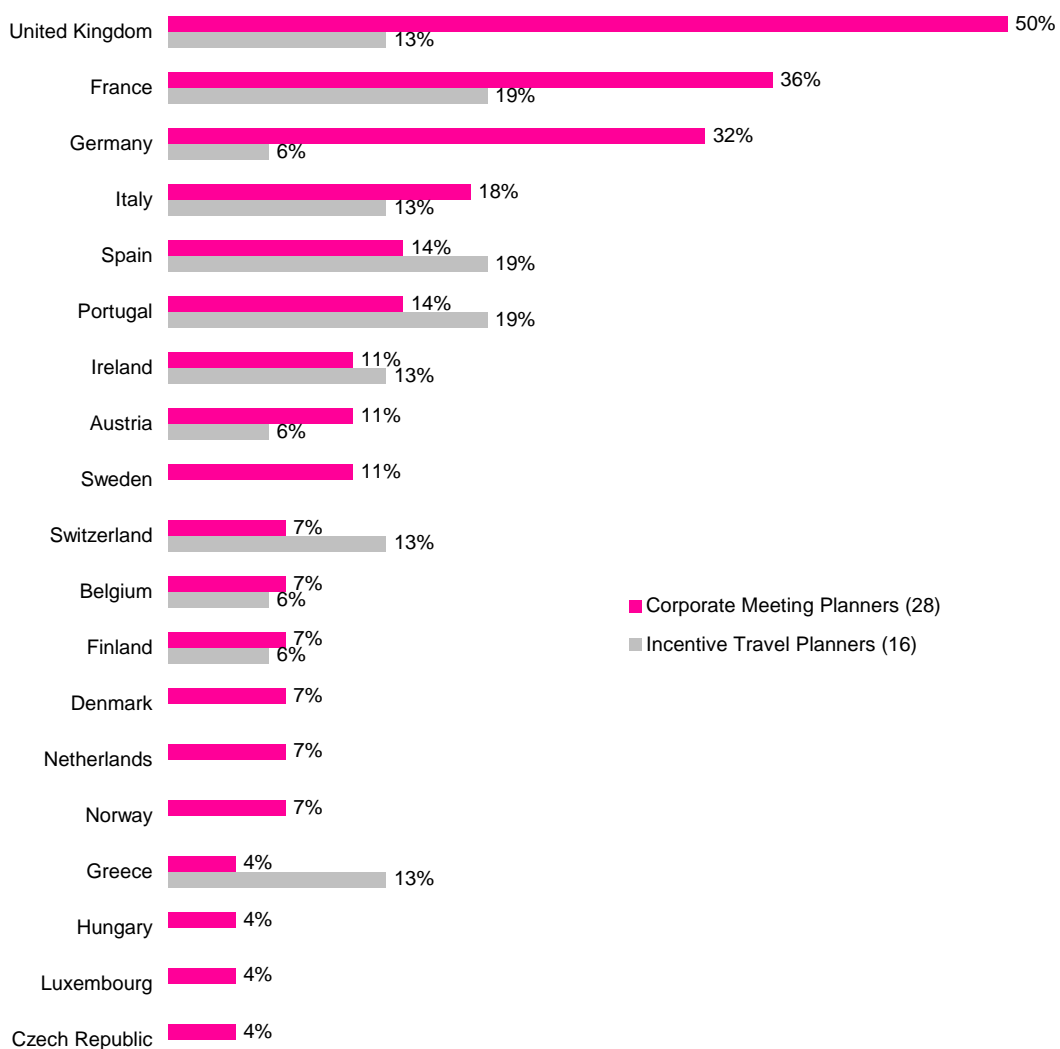
Specific Destinations Planned

Future corporate meeting plans resemble past patterns. Of the UK/European destination choices, the *UK* tops the list; half (50%) of **corporate meeting planners** who are planning travel in Europe in the next three years are considering it. *France* (36%) and *Germany* (32%) rank second and third in confirmed corporate European travel plans.

Consistently, **incentive travel plans** also reflect past usage patterns. The specific European locales most frequently cited include: *France, Spain, and Portugal* (19% each); *Italy, UK, and Ireland, Switzerland, and Greece* (13% each).

FIGURE 9
CONFIRMED DESTINATIONS FOR FUTURE CORPORATE MEETINGS AND INCENTIVE TRAVEL TO EUROPE (Q12)

US RESPONDENT BASE NOTED IN LEGEND (CAUTION: SMALL BASES)



Description of Last Two Meetings/Incentive Trips

Corporate Meetings Outside of North America

As expected, corporate meetings budgets vary considerably:

- The average amount spent for corporate meetings outside of the US is \$381,155, but the median (center-point) amount is about one-quarter of that amount: \$95,833. The wide gap results from the impact of a few, very expensive, corporate meetings.
- The average number of attendees at a corporate meeting outside of North America is 127; the median is 64.
- The average amount spent per attendee at a corporate meeting is \$3,001. Given the average trip duration for corporate meetings outside of North America (4 days), the average per day expense is \$750.

Incentive Travel Outside of North America

Similar to the pattern that emerged with corporate meetings:

- The average (\$291,034) expense for incentive trips is substantially higher than the median (\$190,000). However, the gap is much smaller than for corporate meetings, suggesting fewer very large trips.
- The gap for the number of attendees is also smaller: 116 average; 78 median. However, the incentive trip length is slightly longer than for corporate meetings (4.4 days vs. 4.0).
- This yields an average cost per incentive trip outside of North America of \$2,509; the average cost per person per day is \$570.

The lower cost per person per day is likely due to several factors:

- Incentive travel takes greater advantage of lower cost destinations. Within Europe, for example, incentive trips are often directed towards lower cost regions such as Greece and Spain, in contrast to higher cost corporate meeting locations such as England or France.
- Potential offshore destinations include those other than Europe, such as the Caribbean, where per-day costs are lower, and in many cases, the transportation expenses to and from the US are lower as well.
- Incentive trips are less likely to include the facility expense that is required for corporate meetings.

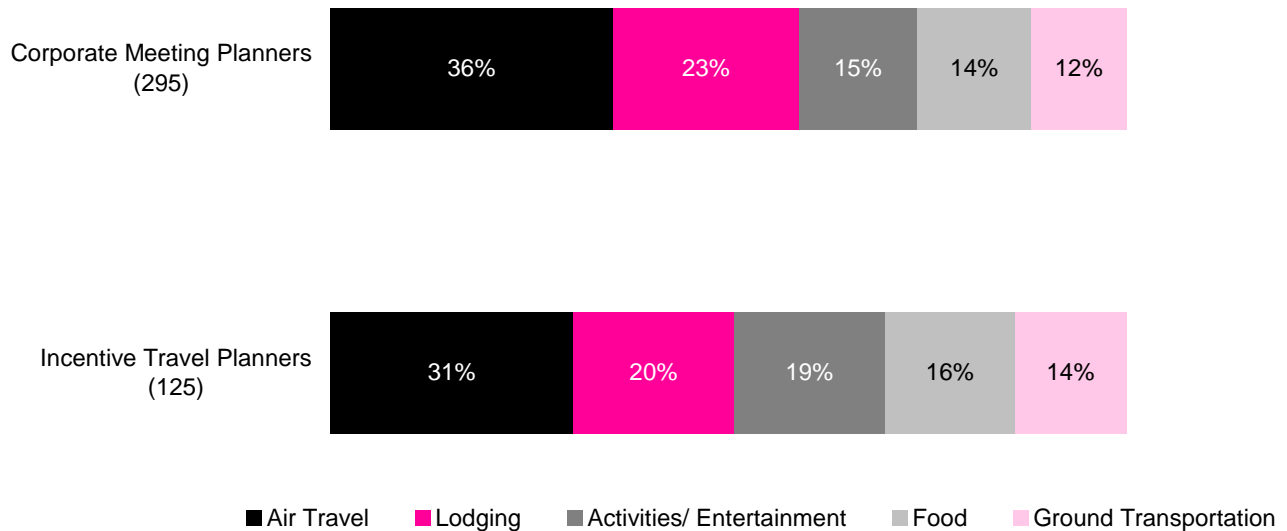
FIGURE 10
DESCRIPTION OF LAST TWO MEETINGS/TRIPS OUTSIDE OF NORTH AMERICA (Q13/14)

	Corporate Meetings	Incentive Trips
Base: Meetings Outside USA/Canada/Mexico in Past Five Months	155	81
Average Amount of Last 2 Meetings/Trips		
\$25,000 or less	16%	11%
\$25,000 to \$100,000	22	19
\$100,001 to \$499,999	14	21
\$500,000+	20	21
Don't know	28	28
Total	100%	100%
Average	\$381,155	\$291,034
Median	\$95,833	\$190,000
Average Attendance of Last 2 Meetings/Trips		
35 or less	30%	27%
36 to 100	37	38
101+	30	31
Don't Know	3	4
Total	100%	100%
Average	127	116
Median	64	78
Average Nights Stayed at Last 2 Meetings/Trips		
Average	4.0	4.4
Median	3.3	3.9
Average Per Attendee	\$3,001	\$2,509
Average Per Attendee Per Day	\$750	\$570

Allocation of Expense

The percentages spent by expenditure category are quite similar for corporate meetings travel and incentive travel. In both cases, *air expense* (36% and 31%, respectively) represents the largest budget item, followed by *lodging* (23%; 20%), *activities/entertainment* (15%; 19%), *food* (14%; 16%), and *ground transport* (12%; 14%).

FIGURE 11
DISTRIBUTION OF MEETINGS/TRIPS EXPENSES ON LAST 2 TRIPS (Q15/Q16)
US RESPONDENT BASE NOTED IN LEGEND



Per Trip Spending

From the total spending and the percentages allocated for each category of an average European /UK trip, total average dollar expenditures are extrapolated as shown below:

FIGURE 12
MEETINGS/INCENTIVE TRIPS EXPENSE AMOUNTS ON LAST 2 TRIPS (Q13-16)

Average	Corporate Meetings	Incentive Travel
Base: US Respondents (Answering)	155/295*	81/125*
Air travel	\$1,066	\$765
Lodging	702	507
Activities/entertainment	444	477
Food	432	409
Ground transportation	<u>357</u>	<u>351</u>
Total	\$3,001	\$2,509
*Base = Answered Q13/Q15		

Average Amount Spent Per Day

The daily tourism expenditures are important for local economies; the results, which exclude the air travel to get there, are quite different between the types of trips. Corporate meeting attendees spend \$484 per day in their respective European designations, compared to an average of \$395 per day for their incentive traveling counterparts. This difference is likely due to differences in the typical areas selected for each type of travel. Incentive travelers may also purchase more out-of-pocket items, such as souvenirs and general shopping, which would not be reimbursed by the corporations and would not appear in the travel planner budget.

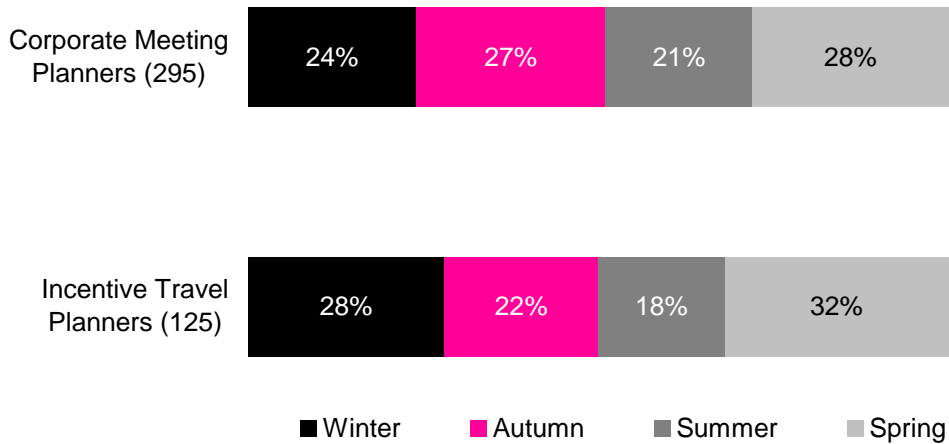
FIGURE 13
MEETINGS/INCENTIVE TRIPS EXPENSE AMOUNTS PER DAY ON LAST 2 TRIPS (Q13-16)

	Corporate Meetings	Incentive Travel
Base: US Respondents	155/295*	81/125*
Lodging	\$176	\$115
Activities/entertainment	111	108
Food	108	92
Ground transportation	<u>89</u>	<u>80</u>
Total amount spent per day exc. Air Transport	484	395
Average number of nights per trip	4.0	4.4
Base: * Answered each question		

Travel Seasonality

Businesses choose *spring* (28%), *autumn* (27%), and *winter* (24%) nearly equally for corporate meetings. They are less frequent in *summer* (21%), likely due to vacation patterns. Incentive travel is most frequently seen in *spring* (32%) and *winter* (28%).

FIGURE 14
SEASONALITY OF CORPORATE MEETINGS/INCENTIVE TRAVEL (Q17)
US RESPONDENT BASE NOTED IN LEGEND



Sources to Plan Corporate Meetings/Incentive Travel

More than half (52%) of corporate meeting planners rely on the Internet as a source for planning **corporate meetings**. Only one corporate meeting planner in five (20%) consults a national tourist organization.

These proportions are roughly the same for **incentive travel** planning. In addition to these two sources, one incentive travel planner in five consults incentive houses (18%).

FIGURE 15
SOURCES USED TO PLAN CORPORATE MEETINGS AND INCENTIVE TRAVEL (Q19/20)

	Corporate Meeting Planners	Incentive Travel Planners
Base: US Respondents	295	125
National tourist organization	20%	21%
Internet	52	46
Incentive houses	NA	18
Other	54	45
Don't know	--	2

Average Number Employees at Corporate Travel Planner/ Incentive Travel Planner Locations

The locations at which corporate and incentive travel planners work vary a great deal. Half of corporate travel planners work in locations with fewer than 111 people while the average number of people working in a meeting planners location approaches 1,000. Because incentive travel planners typically double as meeting planners (they are generally a sub-set), the work locations are quite similar in size.

FIGURE 16
AVERAGE NUMBER OF PEOPLE EMPLOYED AT LOCATION (Q21)

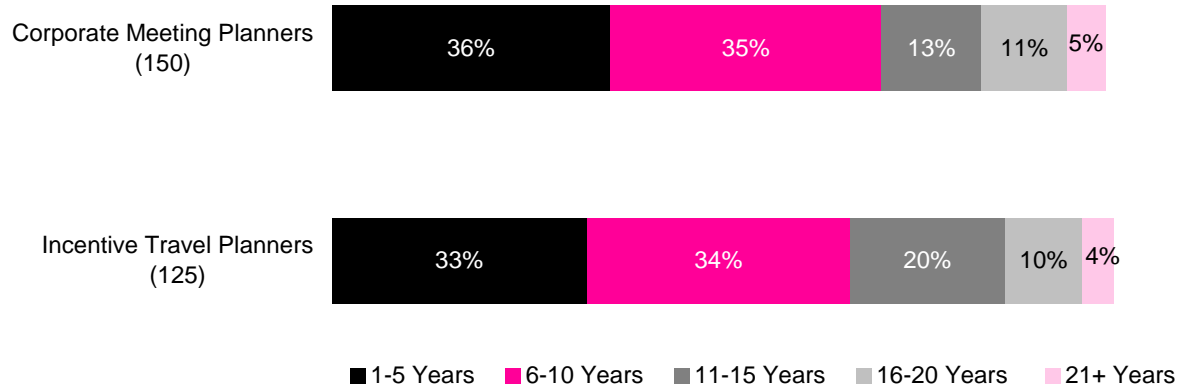
	Corporate Meeting Planners	Incentive Travel Planners
Base: US Respondents	295	125
Average	970	958
Median	111	121

Quantitative Description of
Corporate Meeting Arrangers and
Incentive Travel Decision Planners—Canada

Canada: Number of Years in Travel Planning Role

On average, both Canadian corporate travel arrangers and Canadian incentive travel planners average nearly 10 years in their respective travel planning functions.

FIGURE 17
NUMBER OF YEARS PLANNING MEETINGS OR INCENTIVE TRIPS (Q2)
CANADIAN RESPONDENT BASE NOTED IN LEGEND



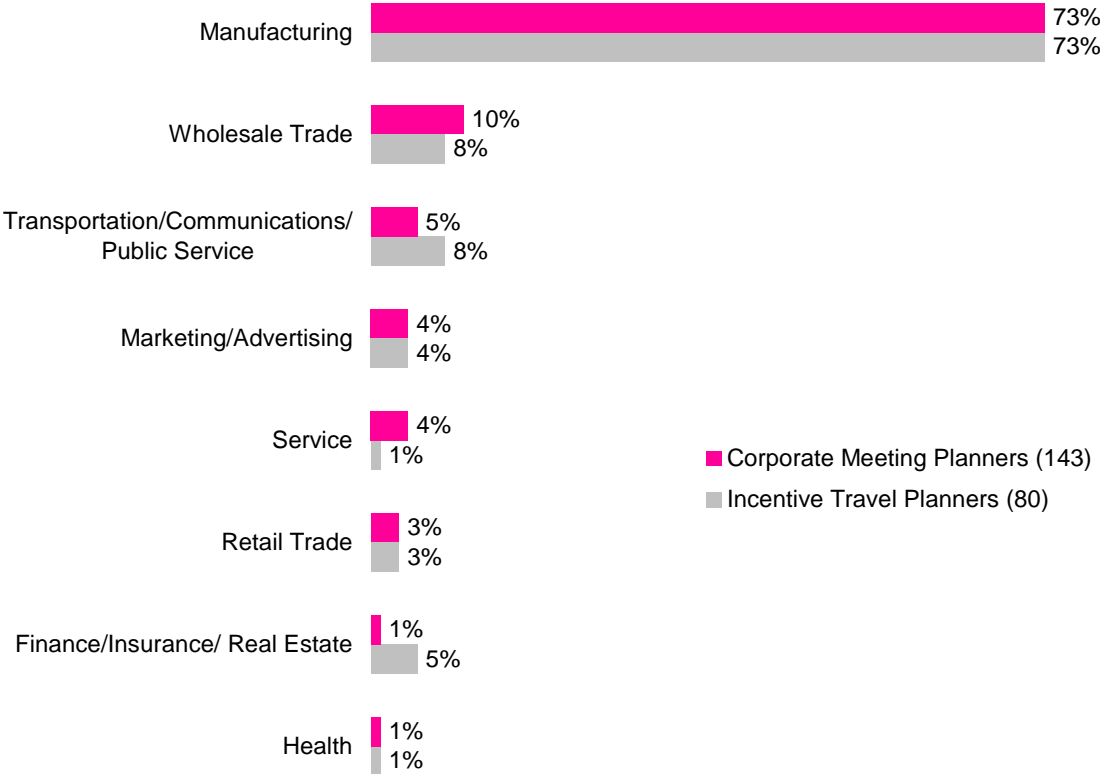
SUMMARY: AVERAGE/MEAN NUMBER OF YEARS AS PLANNER		
	Corporate Meeting Planners	Incentive Travel Planners
Average	9.8	9.6
Median	7.4	7.5

Canada: Industries with Meetings/Incentive Travel

Of the industries surveyed for meetings and incentive travel, *manufacturing* tops the list with three out of four **meeting planners** (73%) and **incentive travel planners** (73%) associated with it. Corporate meeting planners and incentive travel planners in the wholesale trade (10%; 8% respectively) and transportation/communication/public service industry (5%; 8%) comprise a much smaller percentage of this sample.

The corporate meeting planners and incentive travel planners who participated in the Canadian portion of the study usually work for smaller companies that concentrate in a single industry (usually manufacturing).

FIGURE 18
TYPES OF INDUSTRY FOR WHICH MEETINGS ARE ORGANIZED (Q5)
CANADIAN RESPONDENT BASE NOTED IN LEGEND



Canada: Average Number of Meetings/Trips Per Group Size

For both corporate meetings and incentive travel, the typical Canadian group size was substantially smaller than the US group size; none included groups with more than 100 attendees.

FIGURE 19
CANADA: AVERAGE NUMBER OF MEETINGS/TRIPS PER GROUP SIZE (Q7)

	Corporate Meeting Planners		Incentive Travel Planners	
	Proportion of Total	Average # of Meetings Per Category	Proportion of Total	Average # of Meetings Per Category
Base: Canadian Respondents	128	128	38	38
2 to 10 people	83	7.4	96	7.1
11 to 25 people	14	1.2	3	.5
26+ people	3	.2	1	.1
Total*	100%	8.8	100%	7.6
Median Number of Meetings		3.8		1.8
* May not sum due to rounding				

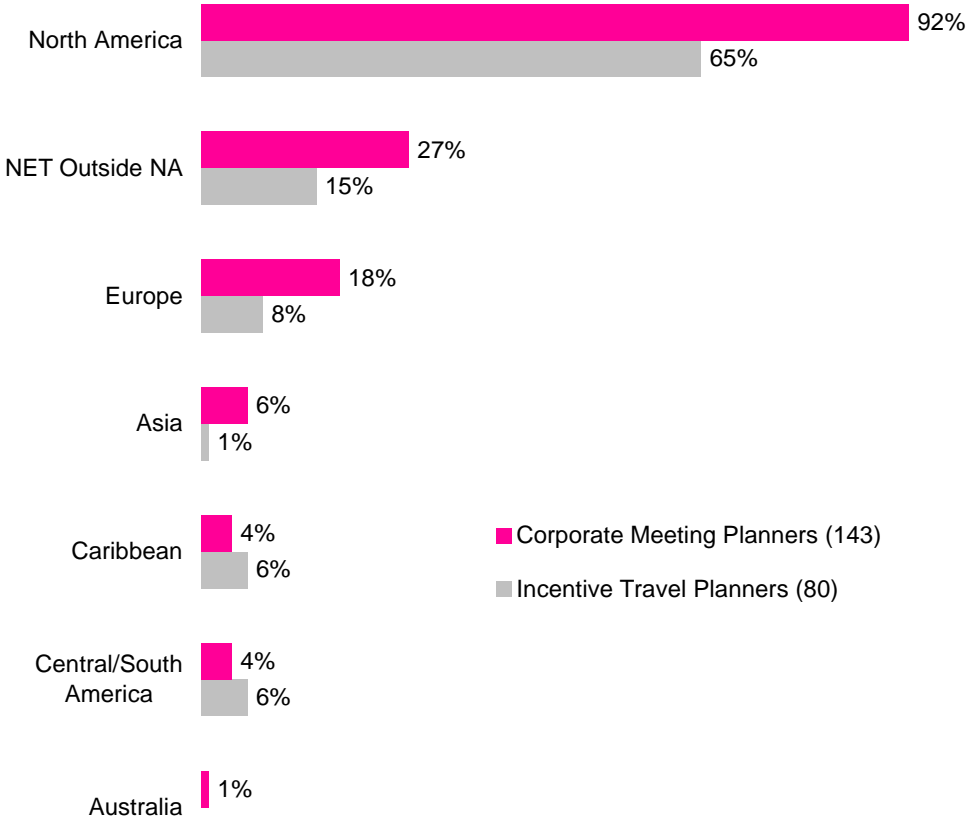
Canada: Corporate Meetings and Incentive Trip Locales

In the past five years, the vast majority (92%) of Canadian **corporate meetings planners** participating in this study have arranged corporate meetings in North America; one in four (27%) arranged at least one outside the continent. Among those who have done so, two-thirds arranged corporate meetings in Europe (67%, i.e., 18%/27%=67%). Asia is the second most common destination, which is consistent with the sample composition. With many of these meeting planners working in the manufacturing sector, Asia represents an area rich in business opportunity, given its own thriving manufacturing industries.

However, travel outside North America is less common for **incentive travel** destinations, especially Asia. Only one in seven (15%) incentive travel planners arranged overseas incentive travel, primarily to Europe (53%), the Caribbean (40%), and Central/South America (40%).

FIGURE 20
DESTINATIONS OF CORPORATE MEETING AND INCENTIVE TRIPS IN PAST 5 YEARS (Q9)

CANADIAN RESPONDENT BASE NOTED IN LEGEND



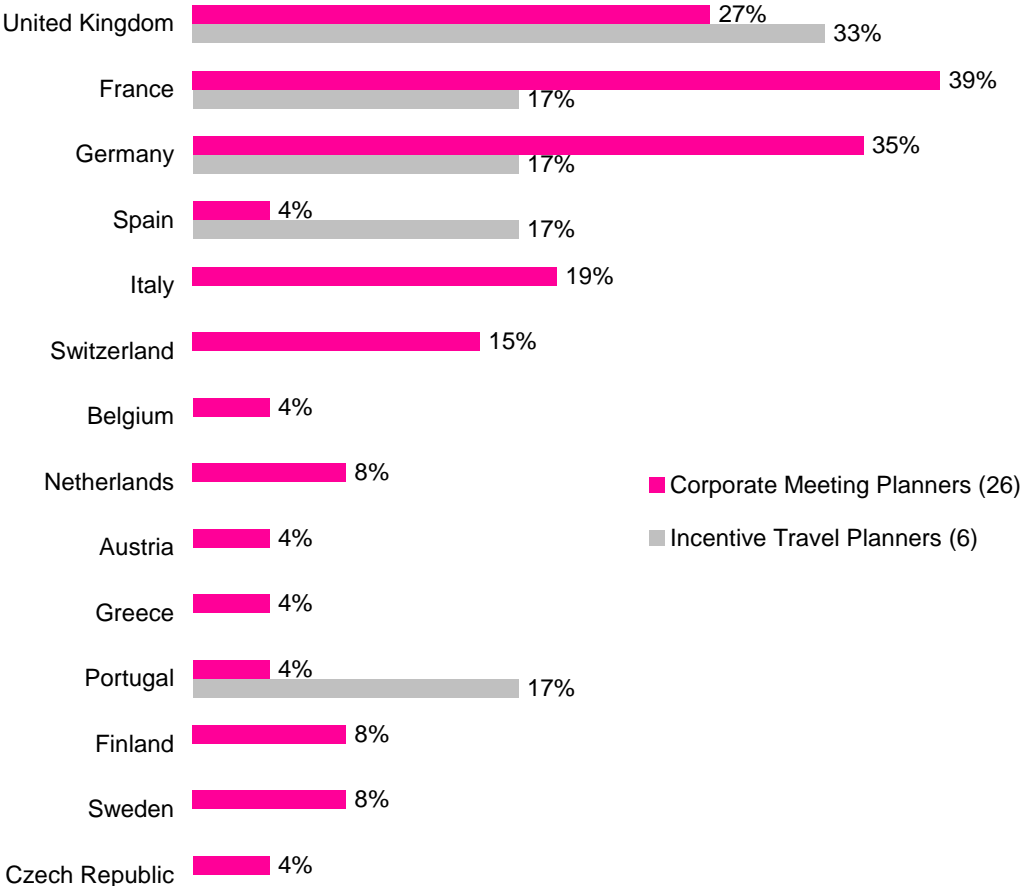
Canada: Specific Destinations Selected in Past Three Years

Canadian **corporate meeting planners** most frequently arranged travel to France (39%), Germany (35%), and the UK (27%) among European destinations in the past three years.

The base for incentive travel to Europe is very small; the data should be viewed as strictly qualitative rather than a reflection of booking patterns. Places where these **incentive travel planners** arranged travel include: the UK, France, Germany, Spain, and Portugal.

FIGURE 21
EUROPEAN DESTINATIONS OF CORPORATE MEETINGS AND INCENTIVE TRAVEL IN THE PAST 3 YEARS (Q10)

CANADIAN RESPONDENT BASE NOTED IN LEGEND (CAUTION: VERY SMALL BASE SIZES)



Canada: Future Europe Travel Plans

Corporate meeting planners are twice as likely (20%) to be considering travel in Europe in the next three years as incentive travel planners (11%).

FIGURE 22
CONSIDERING /CONFIRMED CORPORATE MEETINGS/INCENTIVE TRAVEL
ANYWHERE IN EUROPE IN THE NEXT 3 YEARS (Q11)

Base: Canadian Corporate Meeting Planners	143
Considering corporate meeting in Europe in next 3 years	20%
% of above where corporate meeting is confirmed (Base=28)	21
Base: Canadian Incentive Travel Planners	80
Considering meeting trip to Europe in next 3 years	11
% of above where incentive trip is confirmed (Base=9)	11

Canada: European Destinations Under Consideration

Similar to their US counterparts, specific destinations under consideration for **corporate meetings** by Canadian corporate meeting planners include: France, UK, Germany, Finland, Sweden, and Switzerland. However, the bases for planned **corporate meetings** in Europe are very small and descriptive only.

Only one Canadian **incentive travel** planner is currently considering European travel, but selected two locations: France and Italy (not shown).

FIGURE 23
DESTINATIONS TO WHICH CORPORATE MEETINGS TO EUROPE WILL OCCUR (Q12)

	Corporate Meeting Planners
Base: Canadian Respondents with Confirmations	6
France	50
United Kingdom	50
Germany	33
Finland	17
Sweden	17
Switzerland	17
Caution: Very small base size	

Canada: Allocation of Expense

Canadian expenditure results require caution because the base sizes are too small to be conclusive. The results are described below for descriptive purposes only.

The average amount on **corporate meetings** is \$17,441. Spread among 7.9 attendees this yields an expenditure of \$2,208 per person and \$470 per person, per day (4.7 nights).

Incentive travel, based on 12 respondents, appears higher at \$42,833. With an average of 9.5 attendees, this averages \$4,508 per person and \$1,002 per person, per day.

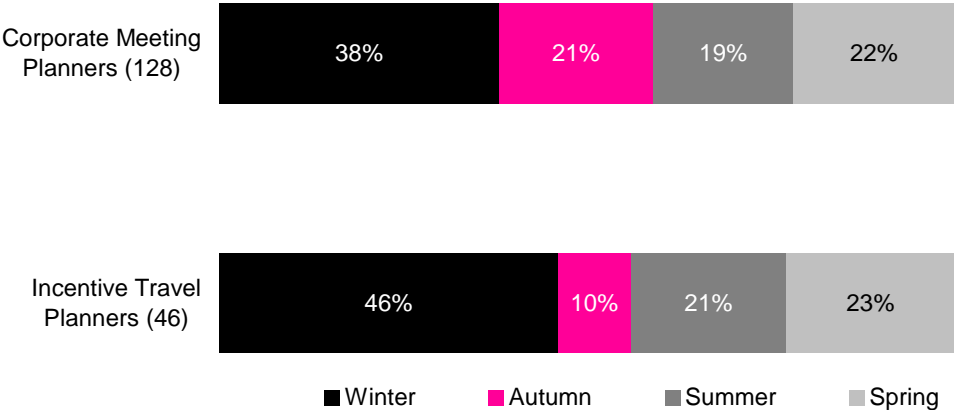
FIGURE 24
TRIP EXPENSES ON LAST 2 TRIPS OUTSIDE OF NORTH AMERICA (Q13-Q16)

	Corporate Meetings	Incentive Travel
Base: Canadian Respondents	38	12
Air travel	40%	41%
Lodging	25	21
Activities/entertainment	14	15
Food	12	13
Ground transportation	9	10
Total*	100%	100%
Mean amount spent per trip	\$17,441	\$42,833
Mean number of attendees	7.9	9.5
Mean number of nights	4.7	4.5
Mean per attendee	\$2,208	\$4,508
Mean per attendee per day	\$470	\$1,002
Median amount spent per trip	\$13,500	\$9,250
Median number of attendees	5.2	1.8
Median number of nights	3.9	5.5
<p>Note: Caution—Base sizes are too small to draw conclusions. *Overall corp. meeting allocations for air/lodging/activities/food/ground based to 2/3 Europe and 1/3 Other Foreign adjusted to 100% *Overall incentive travel allocations for air/lodging/activities/food/ground based to ½ Europe and ½ Other Foreign adjusted to 100%</p>		

Canada: Seasonality

Winter is the most popular season for corporate meetings (38%) and incentive travel (46%).

FIGURE 25
SEASONALITY OF CORPORATE MEETINGS/INCENTIVE TRAVEL (Q17)
CANADIAN RESPONDENT BASE NOTED IN LEGEND



Canada: Sources Used to Plan Meetings/Incentive Travel

The Internet is the most common source of information used to plan corporate meetings (55%) and incentive trips (44%). Fewer than one Canadian respondent in ten (9%) has used a national tourist organization for this purpose.

FIGURE 26
SOURCES USED TO PLAN TRAVEL (Q19/20)

	Corporate Meetings	Incentive Trips
Base: Canadian Respondents	143	80
National tourist organization	9%	9%
Internet	55	44
Incentive houses	NA	1
Other	45	36

Canada: Average Company Size

Respondents in the Canadian version of the survey report working for smaller companies than their America counterparts. The median size of the corporate travel planners location is 40 employees and among the incentive travel planners is just 25.

FIGURE 27
AVERAGE NUMBER OF PEOPLE EMPLOYED AT LOCATION (Q21)

	Corporate Meeting Planners	Incentive Travel Planners
Base: Canadian Respondents	143	80
Average	178	147
Median	40	25

Appendix

List of Companies

List of Companies

ABB	Creative Concepts
Abbott Laboratories	Diamond Aircraft
Abbott Laboratories	Diversified Information Technologies
Advance Star	Dohawk Color Services
Alconsult	Dominion Color Corp
American Home Mortgage	Doritorit Ordering
Amway Corp	Ej Gallo
AON Corp	Etown Travel
Archdioscese Of Denver	Fag Bearing
Automo Ltd	Federal Express
AXA Financial Services	Field Inc
Babcock & Wilcox Canada Ltd	First Class Travel & Cruise Center
Bayshore Steel	Fisher Products Ltd Intl
Birent Communications	Harrisburgh Area Community College
Boyd Inc	HCA
Brad And Whitney	Helmes Brisco
Bristol Squibb	HJ Heinz Corporation
Broadcast Music Inc	Impass Networks
Capitol Travel	Ing
Cardinal Labratories	International Sematech
Castco	Intl Trade Council
Chicago Mercantile Exchange	Jbl Bearing
Chris Hansen Inc	L3 Communications Flight Intl
Christian Dior Perfume	Lacquered Images Limited
Cihr Organization	Legacy Marketing Group
Citibank	Manulized Financial
Coca Cola #42	Mary Kay Inc
Cole National Corp	Meet The Expectations
Comtech	Merrits Travel
Corporate Planners Unlimited	Met Life Resources
Corporate Travel & Meeting Services	Microsoft

Mis Training Institute
Missy Dottie
Mtd Products Ltd
Mtv Networks
Mums Champagne
Nanigan Intl Se
National Ski Patrol
Nautel Limited
Navigent Travel
Next Sounds Canada, Inc
Netix
None
Omega World Travel
Orc
Ouimet Cord On Bleu Foods
Pjt Business Travel Consulting
Pkf North America Network
Prentiss Properties
Prime Vest Financial Services
Progress Software
Reliv
Rexair
Rich Worldwide Travel
Sae
Scientific Therapeutic Informations Inc
Service Master Travel
Snc Lavandae Group
Snc Tech
Stetson University College Of Law
Stevens Travel Mgmt
Store Anselport Hocksbury Ltd
Sunrob Inc
Supertan Intl
Taro Pharmaseuticals
The As You Can Inc
The Estee Lauder Co
The Research Board
The Travel Center
The Travel Office
Timberland
Toronto Offices Of Cinema Fault Leasing
Trenton Works
True North Molds Ltd
World Travel Btr
Worldclass

Questionnaire

Corporate Meetings and Incentive Travel Segments in the US March 18, 2003

May I speak to **(NAME ON LIST)**? **(REINTRODUCE IF NECESSARY)**

Hello, I'm _____ from NFO Plog Research, a national marketing research firm that specializes in travel research. We're calling to conduct a brief survey about corporate travel. This will take just a few minutes. This is a legitimate research study and we are NOT selling anything. I think you will find the questions interesting and enjoyable.

-
1. I would like you to think about your involvement in planning corporate meetings/incentive travel. By planning for corporate meetings/incentive travel, I mean you are involved in the selection of the destination, facility, and travel arrangements. Do your job responsibilities involve planning corporate meetings, incentive travel, both corporate meetings and incentive travel, or neither?

Corporate meetings..... 1
 Incentive travel 2
 Both..... 3
 Neither..... 4

IF Q1=4 TERM

- 1a. How would you best describe your involvement in the in the decision-making process for planning corporate meetings / incentive travel?

Make recommendations/bookings, but am not part of the decision making process 1
 Involved in decision making process 2

IF Q1a=2 TERM

2. How long have your job responsibilities included planning, influencing and/or decision making in respect to corporate meetings and/or incentive travel for your company or division? **(RECORD RESPONSE)**

Years _____ Months _____

3. How many **(if Q1=1: corporate meetings) (if q1=2: incentive trips) (if q1=3: corporate meetings and incentive trips)** have you planned in the past year?

Corporate Meetings Incentive travel

4. And how many **(if Q1=1: corporate meetings) (if q1=2: incentive trips) (if q1=3: corporate meetings and incentive trips)** in the past 3 years?

Corporate Meetings Incentive travel

5. On behalf of what type of businesses have you organized (if Q1=1: corporate meetings) (if q1=2: incentive trips) (if q1=3: corporate meetings and incentive trips)?

Manufacturing.....	1
Transportation/Communication/Public Service	2
Wholesale Trade	3
Retail Trade	4
Finance/Insurance/Real Estate	5
Marketing/Advertising	6
Service.....	7
Health	8
Public Utility	9

6. What type of business is the primary source of (if Q1=1: corporate meetings) (if q1=2: incentive trips) (if q1=3: corporate meetings and incentive trips) for your company?

Manufacturing.....	1
Transportation/Communication/Public Service	2
Wholesale Trade	3
Retail Trade	4
Finance/Insurance/Real Estate	5
Marketing/Advertising	6
Service.....	7
Health	8
Public Utility	9

If Q1=1 OR 3 ask Q7, else skip to Q8

7. And approximately how many corporate meetings for each group size did you organize in the past year? (TOTAL SHOULD SUM TO Q3C RESPONSE)

2 - 10 people	_____	# Corporate meetings
11 - 25	_____	# Corporate meetings
26 - 50	_____	# Corporate meetings
51 - 100	_____	# Corporate meetings
101 - 300	_____	# Corporate meetings
301 - 500	_____	# Corporate meetings
501 - 1000	_____	# Corporate meetings
More than 1000	_____	# Corporate meetings

TA Q1(2,3)

8. And approximately how many incentive trips for each group size did you organize in the past year? (TOTAL SHOULD SUM TO Q3C RESPONSE)

2 - 10 people	_____	# Incentive trips
11 - 25	_____	# Incentive trips
26 - 50	_____	# Incentive trips
51 - 100	_____	# Incentive trips
101 - 300	_____	# Incentive trips
301 - 500	_____	# Incentive trips
501 - 1000	_____	# Incentive trips
More than 1000	_____	# Incentive trips

If q1=2 ask incentive travel only

If q1=1 ask corporate meetings only

If q1=3 ask corporate meetings and incentive travel

9. To which of the following destinations have you planned (**corporate meetings and incentive travel**) in the past 5 years?

	<u>Corporate Meetings</u>	<u>Incentive travel</u>
North America	1	1
Europe or the UK	2	2
Central or South America	3	3
Asia	4	4
The Caribbean	5	5
Australia	6	6

10. Within Europe, which of the following destinations have you planned (**if q9C= 2:corporate meetings**) or (**if q9I=2:incentive travel**) in the past 3 years?

	<u>Corporate Meetings</u>	<u>Incentive travel</u>
Austria	1	1
Belgium	2	2
Denmark	3	3
Spain	4	4
Finland	5	5
France	6	6
Germany	7	7
Greece	8	8
Ireland	9	9
United Kingdom	0	0
Netherlands	X	X
Hungary	Y	Y
Italy	1	1
Luxemburg	2	2
Norway	3	3
Portugal	4	4
Sweden	5	5
Switzerland	6	6
Czech Republic	7	7
Other (PLEASE SPECIFY) _____	8	8

11a. **TA Q1(1,3)** Are you considering a corporate meeting anywhere in Europe in the next 3 years?
 Yes.....1
 No2

11b. **(ASK ONLY IF Q11a = 1)** Are any European corporate meetings yet confirmed?
 Yes1
 No.....2

11c. **TA Q1(2,3)** And, are you considering incentive travel anywhere in Europe in the next 3 years?
 Yes.....1
 No2

11d. **(ASK ONLY IF Q11a = 1)** Are any European incentive trips yet confirmed?
 Yes 1
 No 2

12. **(ASK Corporate meeting ONLY IF Q11b= 1 and incentive travel if Q11d = 1)** To which destinations will **(incentive travel and/or corporate meetings)** to Europe occur? **(DO NOT READ LIST)**

	Corporate Meetings	Incentive travel
Austria	1	1
Belgium	2	2
Denmark	3	3
Spain	4	4
Finland	5	5
France	6	6
Germany	7	7
Greece	8	8
Ireland	9	9
United Kingdom	0	0
Netherlands	X	X
Hungary	Y	Y
Italy	1	1
Luxemburg	2	2
Norway	3	3
Portugal	4	4
Sweden	5	5
Switzerland	6	6
Czech Republic	7	7
Other (PLEASE SPECIFY) _____	8	8

Ask 13 if q9C(2-6)

13a. Taking an average of the last two meetings that you planned outside of the USA, Canada, or Mexico, what was the average total amount spent on these meetings?

\$ _____

13b. . . .and how many people attended on average?

13c. . . .and how many nights, on average, did attendees stay?

14a. **TA Q9I(2-6)** Taking an average of the last two incentive trips that you arranged outside of the USA, Canada, or Mexico, what was the average total amount spent?

\$ _____

14b. . . .and how many people, on average, traveled?

14c. . . .and how many nights, on average, did incentive travelers stay?

TA q1(2,3)

15. Thinking of your last two overseas incentive trips, how would you allocate the total distribution of expense, whether paid for by the company or the individual traveler overall among air costs, activities/entertainment, ground transportation, lodging, and food?

	Overall	Foreign	Europe
Air travel	_____%	_____%	_____%
Activities/entertainment	_____%	_____%	_____%
Ground transportation	_____%	_____%	_____%
Lodging	_____%	_____%	_____%
Food	_____%	_____%	_____%

TA Q1(1,3)

16. Think of your last two overseas meetings, how would you allocate the total distribution of expense, whether paid for by the company or the individual traveler overall among air costs, activities/entertainment, ground transportation, lodging, and food?

	Overall	Foreign	Europe
Air travel	_____%	_____%	_____%
Activities/entertainment	_____%	_____%	_____%
Ground transportation	_____%	_____%	_____%
Lodging	_____%	_____%	_____%
Food	_____%	_____%	_____%

17. **TA Q1(1,3)** Thinking of the corporate meetings in your firm in the last 12 months, what percentage were in...?

Winter (Dec. - Feb.)	_____%	Spring (March – May)	_____%
Summer (June – Aug.)	_____%	And Autumn (Sept. - Nov.)	_____%

TA Q1(2,3)

18. Thinking of the incentive travel in your firm in the last 12 months, what percentage was in...?

Winter (Dec. - Feb.)	_____%	Spring (March – May)	_____%
Summer (June - Aug.)	_____%	And Autumn (Sept. - Nov.)	_____%

TA Q1(1,3)

19. Which of the following sources do you use to plan corporate meetings?

- National tourist organization
- The Internet
- Other (**SPECIFY**): _____

TA Q1(2,3)

20. Which of the following sources do you use to plan incentive travel?

- National tourist organization
- The Internet
- Incentive houses
- Other (**SPECIFY**): _____

21. How many people does your company employ at your location?

- Fewer than 50 _____
- 50 - 99 _____
- 100 - 249 _____
- 250 - 499 _____
- 500 - 999 _____
- 1000 - 4999 _____
- 5000 or more _____

22. And finally, in what state is your office located? **(RECORD RESPONSE)**

IF QUALIFY:

BASED ON YOUR RESPONSES, YOU QUALIFY FOR A FOLLOW UP INTERVIEW THAT WE WILL BE CONDUCTING NEXT WEEK. IT WILL TAKE ABOUT TWENTY MINUTES OF YOUR TIME. WE KNOW THAT WE CANNOT ADEQUATELY COMPENSATE YOU FOR YOUR TIME, BUT WE WILL SEND YOU \$25 AS A TOKEN OF OUR APPRECIATION FOR YOUR PARTICIPATION. SO YOU WILL PARTICIPATE, RIGHT?

___ **YES → WHAT DATE AND TIME WOULD BE MOST CONVENIENT NEXT WEEK?**

Date: _____

Time: _____

___ **NO**

Thank you for your time—We really appreciate it!

Survey

Hello, I am CeeCee calling from NFO Plog Research. Several weeks ago we called you and you participated in a survey about you firm’s corporate travel plans and/or incentive travel patterns. Today I am calling to follow up with some additional questions. I know that we cannot adequately compensate you for your time, but as a small token of our appreciation we will send you \$25 for participating.

1. What is your job title?

2. Ordinarily what is the title of the person who is the final decision maker for deciding on the location of the European corporate meeting or incentive trip? (Do not read)

CEO

President

Department head

A committee

Other: Specify: _____

DO NOT ASK ON PRIMARY SAMPLE

3. To which of the following destinations have you planned meetings or incentive travel in the last 3 years?

	<u>Meetings</u>	<u>Incentive</u>
Austria	<input type="checkbox"/>	<input type="checkbox"/>
Belgium	<input type="checkbox"/>	<input type="checkbox"/>
Denmark	<input type="checkbox"/>	<input type="checkbox"/>
Spain	<input type="checkbox"/>	<input type="checkbox"/>
Finland	<input type="checkbox"/>	<input type="checkbox"/>
Germany	<input type="checkbox"/>	<input type="checkbox"/>
Greece	<input type="checkbox"/>	<input type="checkbox"/>
Ireland	<input type="checkbox"/>	<input type="checkbox"/>
United Kingdom	<input type="checkbox"/>	<input type="checkbox"/>
Netherlands	<input type="checkbox"/>	<input type="checkbox"/>
Hungary	<input type="checkbox"/>	<input type="checkbox"/>
Italy	<input type="checkbox"/>	<input type="checkbox"/>
Luxemburg	<input type="checkbox"/>	<input type="checkbox"/>
Norway	<input type="checkbox"/>	<input type="checkbox"/>
Portugal	<input type="checkbox"/>	<input type="checkbox"/>
Sweden	<input type="checkbox"/>	<input type="checkbox"/>
Switzerland	<input type="checkbox"/>	<input type="checkbox"/>
Czech Republic	<input type="checkbox"/>	<input type="checkbox"/>

4. And which of the following would you consider for corporate meetings/incentive travel in the next 3 years?

	<u>Meetings</u>	<u>Incentive</u>
Austria	<input type="checkbox"/>	<input type="checkbox"/>
Belgium	<input type="checkbox"/>	<input type="checkbox"/>
Denmark	<input type="checkbox"/>	<input type="checkbox"/>
Spain	<input type="checkbox"/>	<input type="checkbox"/>
Finland	<input type="checkbox"/>	<input type="checkbox"/>
Germany	<input type="checkbox"/>	<input type="checkbox"/>
Greece	<input type="checkbox"/>	<input type="checkbox"/>
Ireland	<input type="checkbox"/>	<input type="checkbox"/>
United Kingdom	<input type="checkbox"/>	<input type="checkbox"/>
Netherlands	<input type="checkbox"/>	<input type="checkbox"/>
Hungary	<input type="checkbox"/>	<input type="checkbox"/>
Italy	<input type="checkbox"/>	<input type="checkbox"/>
Luxemburg	<input type="checkbox"/>	<input type="checkbox"/>
Norway	<input type="checkbox"/>	<input type="checkbox"/>
Portugal	<input type="checkbox"/>	<input type="checkbox"/>
Sweden	<input type="checkbox"/>	<input type="checkbox"/>
Switzerland	<input type="checkbox"/>	<input type="checkbox"/>
Czech Republic	<input type="checkbox"/>	<input type="checkbox"/>

5. In what country was your last European corporate meeting or incentive trip?

	<u>Meetings</u>	<u>Incentive</u>
Austria	<input type="checkbox"/>	<input type="checkbox"/>
Belgium	<input type="checkbox"/>	<input type="checkbox"/>
Denmark	<input type="checkbox"/>	<input type="checkbox"/>
Spain	<input type="checkbox"/>	<input type="checkbox"/>
Finland	<input type="checkbox"/>	<input type="checkbox"/>
Germany	<input type="checkbox"/>	<input type="checkbox"/>
Greece	<input type="checkbox"/>	<input type="checkbox"/>
Ireland	<input type="checkbox"/>	<input type="checkbox"/>
United Kingdom	<input type="checkbox"/>	<input type="checkbox"/>
Netherlands	<input type="checkbox"/>	<input type="checkbox"/>
Hungary	<input type="checkbox"/>	<input type="checkbox"/>
Italy	<input type="checkbox"/>	<input type="checkbox"/>
Luxemburg	<input type="checkbox"/>	<input type="checkbox"/>
Norway	<input type="checkbox"/>	<input type="checkbox"/>
Portugal	<input type="checkbox"/>	<input type="checkbox"/>
Sweden	<input type="checkbox"/>	<input type="checkbox"/>
Switzerland	<input type="checkbox"/>	<input type="checkbox"/>
Czech Republic	<input type="checkbox"/>	<input type="checkbox"/>

6. What do you consider the main advantages and disadvantages of European countries for corporate meetings and incentive trips **PROBE:**

Advantages (6a)	Country (if applicable)	Disadvantages (6b)	Country (if applicable)

7. When considering this European destination for your corporate meeting /incentive trip (as applies) did you decide on the country first and then select a location within the country, or did you initially decide on the specific city or region?

- A specific country within Europe
- A specific city or region

IF country first

8. How do you determine which location within the country to hold the corporate meeting?

9. Do you have a predetermined list of destinations from which you choose to have a European corporate meeting or incentive trip venue, or do you evaluate destinations equally on an individual basis

- Predetermined list
- Evaluate destinations on individual basis

IF on a predetermined basis

10a. How was the predetermined list established? What criteria was applied?

10b. Under what circumstances, if any, would you consider deviating from that list?

If evaluate on an individual basis

10c. When considering your last European corporate meeting /incentive trip, why did you decide on (INSERT LOCATION)?

10d. Would you consider holding your next meeting at the same location? If not, when would be the next time you would consider the destination again?

11. And from which, if any, of the following have you seen or heard about special promotions?

Did you book as a result of this promotion?

	<u>Seen or Heard</u>	<u>Resulted in Booking</u>
Travel agents	<input type="checkbox"/>	<input type="checkbox"/>
Third party meeting planner	<input type="checkbox"/>	<input type="checkbox"/>
Print media	<input type="checkbox"/>	<input type="checkbox"/>
Internet	<input type="checkbox"/>	<input type="checkbox"/>
Trade publications	<input type="checkbox"/>	<input type="checkbox"/>
Newsletters from associations	<input type="checkbox"/>	<input type="checkbox"/>
National or local tourist office	<input type="checkbox"/>	<input type="checkbox"/>
Conventions and Visitors Bureaus	<input type="checkbox"/>	<input type="checkbox"/>

12. What type of information do you want when choosing a destination that is under consideration?

13. Where would do expect to get this information?

14. When considering European destinations, which promotional activities such as workshops, sales calls, facility visits, one-on-one appointments etc, are most useful to you?

(Interviewer note: If FAM trip mentioned, probe for others)

15. What types of promotions or activities are European tourist offices providing to influence your decision to choose a European destination? Are they working? Are you likely to book as a result of it?

16a. Are there other types of activities that you do not presently receive from European tourist offices that would be useful to you in choosing a European destination? If so, what are they?

16b. Is there anything that destinations from OUTSIDE Europe do, from which European destinations could learn?

17. Has the inception of the Euro had an affect on locations you chose for corporate meetings and/or incentive trips? If so, to what extent does its inception affect your decision to hold a corporate meeting or incentive trip is Europe or to hold it in Asia, South or North America or another location?

18. Under what circumstances, if any, will you select a European destination with that currently offers an unfavorable exchange rate?

19a. Has your volume of offshore meetings increased, decreased, or stayed the same in the past 3 years?

- Increased___
- Decreased___
- Stayed same___

IF NOT STAYED SAME

19b) Why?

- | | |
|---|--|
| <input type="checkbox"/> Deceased | <input type="checkbox"/> Increased |
| <input type="checkbox"/> Fear or terrorism | <input type="checkbox"/> Better travel deals |
| <input type="checkbox"/> Economy | <input type="checkbox"/> Corporate merger or acquisition |
| <input type="checkbox"/> Impact of war | <input type="checkbox"/> Thriving business |
| <input type="checkbox"/> Aftermath of 911 | <input type="checkbox"/> SARS |
| <input type="checkbox"/> Other specify: _____ | |

20. What would you say are the essential ingredients to a successful corporate meeting or incentive trip to Europe?

21. Thinking about future corporate meeting /incentive trip you helped arrange, which of the following types of lodging are most likely to be used for a) corporate meetings and b incentive trips

	Corporate meetings	Incentive trips
Downtown hotel	<input type="checkbox"/>	<input type="checkbox"/>
Suburban hotel	<input type="checkbox"/>	<input type="checkbox"/>
Airport hotel	<input type="checkbox"/>	<input type="checkbox"/>
Convention center	<input type="checkbox"/>	<input type="checkbox"/>
Suite hotel	<input type="checkbox"/>	<input type="checkbox"/>
Resort hotel	<input type="checkbox"/>	<input type="checkbox"/>
Golf hotel	<input type="checkbox"/>	<input type="checkbox"/>
Residential conference center	<input type="checkbox"/>	<input type="checkbox"/>
Gaming facility	<input type="checkbox"/>	<input type="checkbox"/>
Cruise ship	<input type="checkbox"/>	<input type="checkbox"/>

Other specify: _____

22. And what type of activities are likely to be popular for attendees at A) corporate meetings and b) incentive trips?

Corporate meetings:

Incentive trips:

_____	_____
_____	_____
_____	_____
_____	_____

23. How are the funds generated to finance a European offshore corporate meeting or incentive trip?

From the corporate treasury

From the department

From a client

Other specify: _____

24. On average, how long after the decision is made to hold a corporate meeting or take an incentive trip in Europe is the decision made on the specific destination within Europe?

25. And on average, how long after the destination in Europe is selected does the trip actually take place?

26. Now I would like to ask you a few questions about Britain:

How long has it been, if ever, since a corporate meeting or incentive trip was held in Britain by someone in your firm?

27. What do you see as the advantages of holding a corporate meeting or incentive trip to Britain?

28. And what do you see as the disadvantages?

IF BRITAIN BOOKED

29. And if you were considering Europe as a destination, what would encourage you to choose Britain? What does Britain offer that makes it special? What sort of information would help you consider Britain it as a destination?

IF BRITAIN NOT BOOKED

30. Why didn't you select Britain? What doesn't Britain offer that other European destinations have? Is there any other information that would rectify the fact that you have booked other European destinations but have not booked Britain?

IF Selected Britain in destination HAVE VISITED PAST 3 years section ask

31. To which of the following locations in Britain did your firm hold a corporate meeting or incentive trip?

- London
- Southern England
- Midlands
- Northern England
- Northern Ireland
- Wales
- Scotland

32. Why did you/didn't you choose London

33. Why did you/didn't you choose Southern England

34. Why did you/didn't you choose Midlands

35. Why did you/didn't you choose Northern England

36. Why did you/didn't you choose Wales

37. Why did you/didn't you choose Scotland

IF Selected Britain in destination will visit next 3 years section ask

38. To which of the following locations in Britain would you consider holding a corporate meeting or incentive trip?

- London
- Southern England
- Midlands
- Northern England
- Northern Ireland
- Wales
- Scotland

39. I am going to read a list of attributes, please let me know how important each is on your decision to book a particular destination- is it very important, somewhat important, neither important nor unimportant, somewhat unimportant or not at all important

	<u>Very important</u>	<u>Somewhat important</u>	<u>Nether important nor unimportant</u>	<u>Somewhat unimportant</u>	<u>Not at all important</u>
Accessibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value for the money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Countryside	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safe destination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Destination kudos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Range of accommodations available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

40. I would like you to rate Britain on a variety of features from 1 to 5, where 5 means excellent and 1 means not poor. Please rate. . .

	5-1
Accessibility	_____
Value for the money	_____
Countryside	_____
Safe destination	_____
Destination kudos	_____
Heritage	_____
Range of accommodations available	_____

41. Thinking about the characteristics of any previous trips you have taken to Britain what was the transportation used to get people there

Airplane_____

42. And what were the forms of transportation used when the attendees were there

- Taxi
- Bus
- Plane
- Boat
- Hovercraft
- Subway
- Train
- Trolley
- Bicycle
- Walk

43. In what season or seasons have you booked travel to Britain?

- Spring
- Summer
- Winter
- Fall

44. And have you booked Britain as a full-package, partial package or as independent travel in the past (select all that apply)

- Full package
- Partial package
- Independent travel

45. Tell me all of the types of accommodation you booked for Britain.

46. What do you think about the current accommodations available in Britain

47. What sort of accommodation do you require? Is it available in Britain

48. Please describe your interest level in future trips to Britain in each of the following

	<u>Used</u>
Visiting country houses or stately homes	<input type="checkbox"/>
Pageantry such as the changing of the guard, etc.	<input type="checkbox"/>
Site seeing tours	<input type="checkbox"/>
Sport, e.g., fishing, shooting, cricket	<input type="checkbox"/>
Visiting countryside	<input type="checkbox"/>
Energetic exercises such as canoeing, climbing, abseiling	<input type="checkbox"/>

49. And what other activities would you be interested in doing?

50. Approximately how many employees at your location does your company or organization employ?

51. What type of business is it?

Manufacturing	<input type="checkbox"/>
Transportation/communication/public utilities	<input type="checkbox"/>
Wholesale trade	<input type="checkbox"/>
Retail trade	<input type="checkbox"/>
Finance/insurance/real estate	<input type="checkbox"/>
Business or repair services	<input type="checkbox"/>
Personal services	<input type="checkbox"/>
Professional services	<input type="checkbox"/>
Public admin/Government	<input type="checkbox"/>