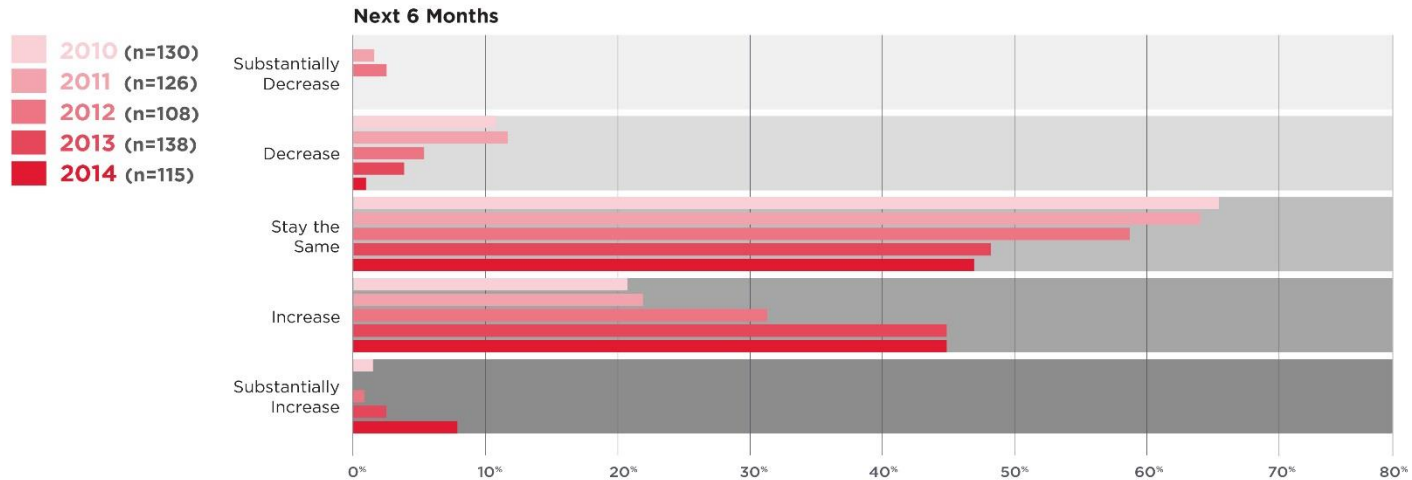


Optimism about the use of motivational travel continues to increase, though modestly

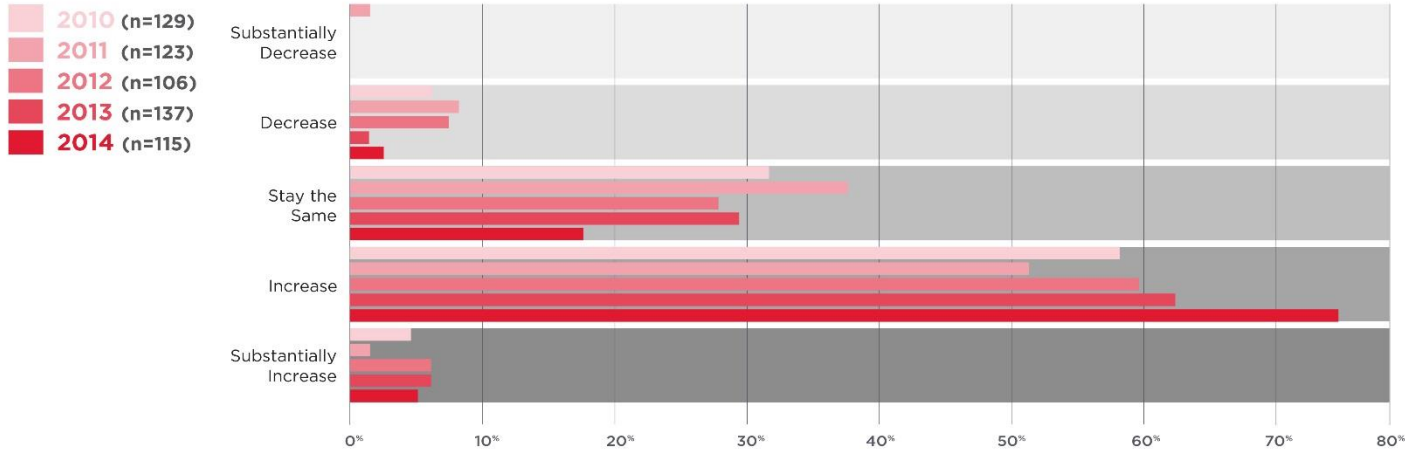
In the time period listed, what do you believe will happen to the overall use of motivational travel experiences?



52% of respondents say the use of motivational travel will increase over the next six months

In the time period listed, what do you believe will happen to the overall use of motivational travel experiences?

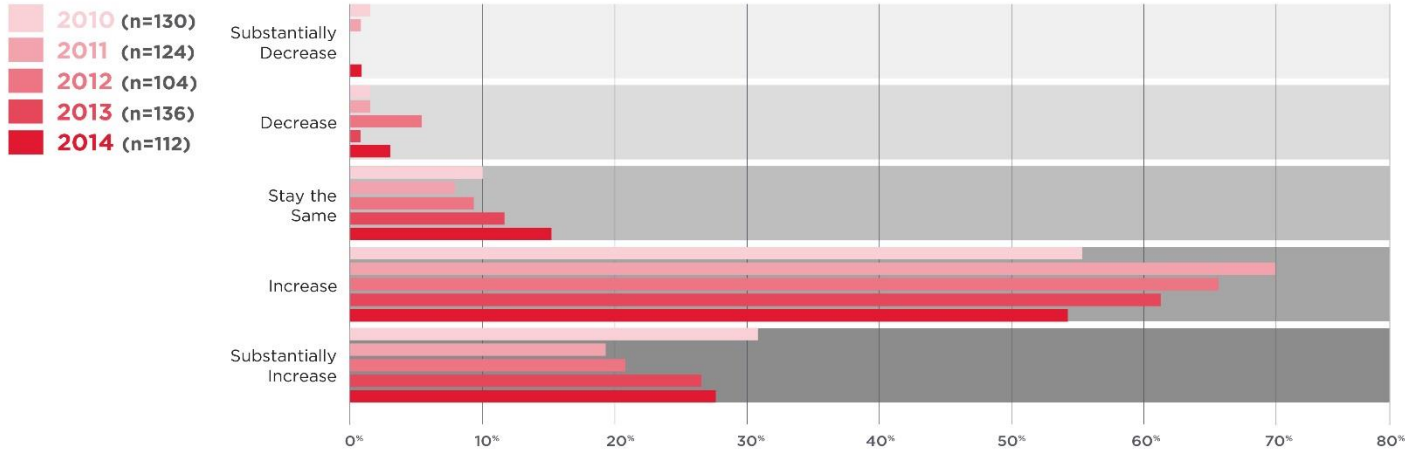
6 to 12 Months



There is a slight decrease in optimism about the use of motivational travel over the next 1 to 3 years

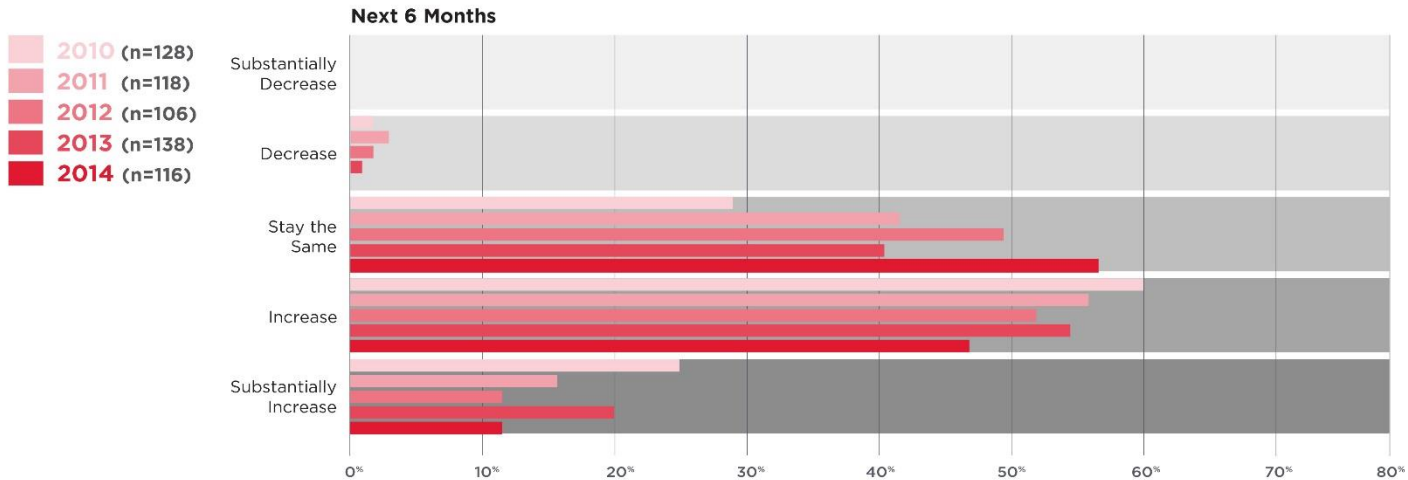
In the time period listed, what do you believe will happen to the overall use of motivational travel experiences?

1 to 3 Years



ROI/ROO measurement will stay the same over the next 6 months

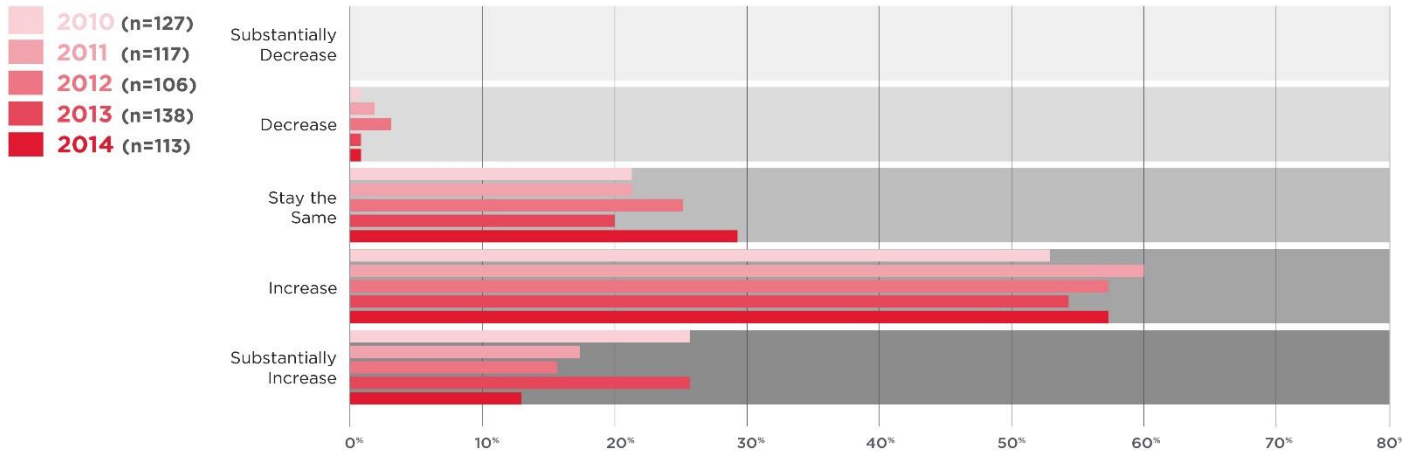
In the time periods listed, what do you believe will happen to the requirements to measure ROI and/or ROO?



ROI/ROO measurement will not substantially increase beyond the next 6 months

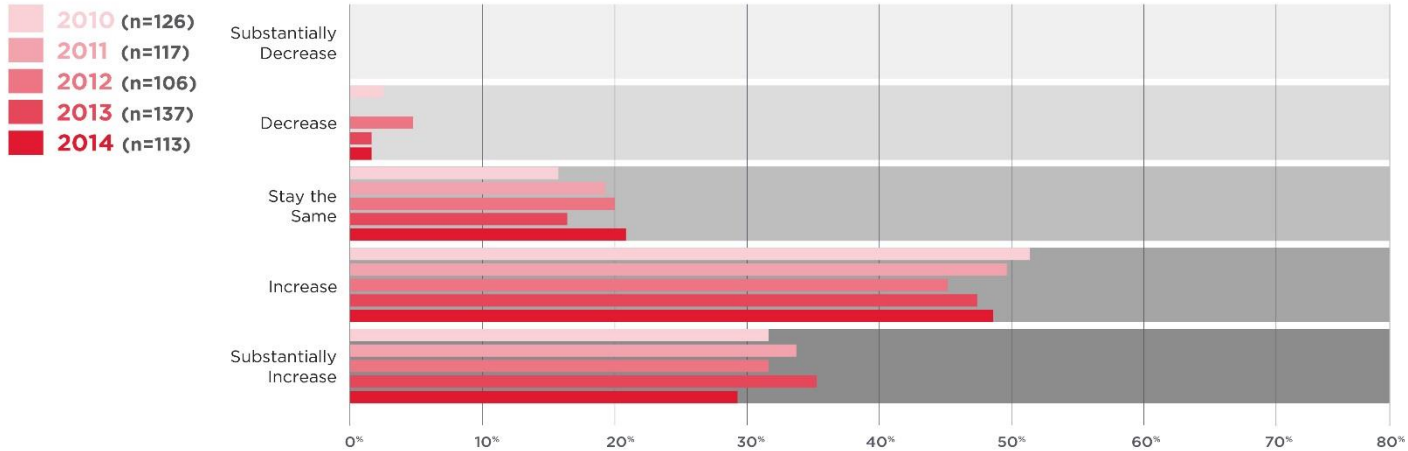
In the time periods listed, what do you believe will happen to the requirements to measure ROI and/or ROO?

6 to 12 Months



In the time periods listed, what do you believe will happen to the requirements to measure ROI and/or ROO?

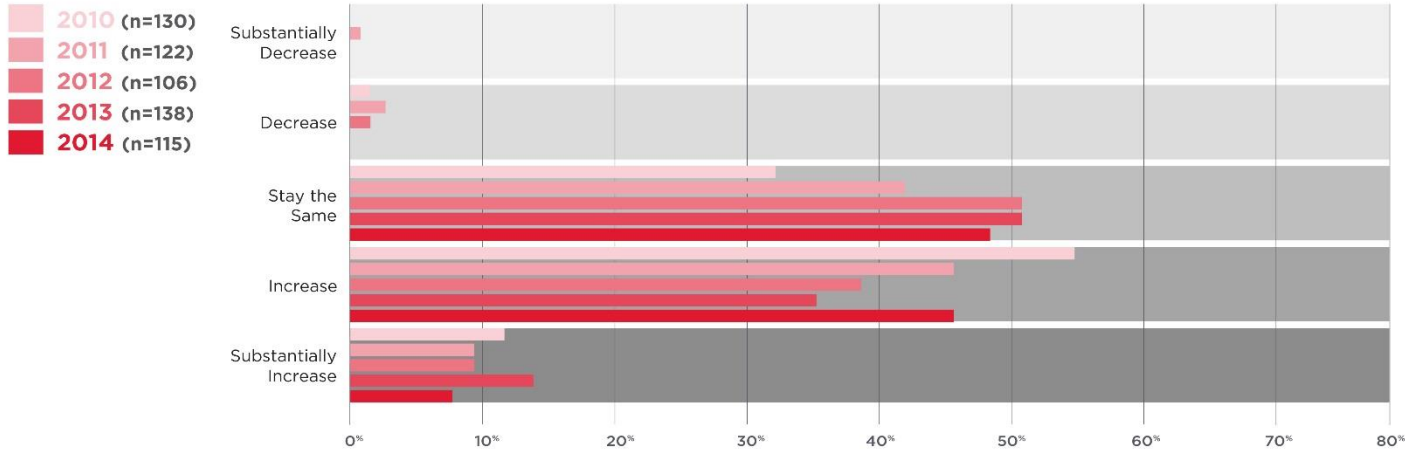
1 to 3 Years



There is little change in the involvement of top management in the decision making process over the next 6 months

In the time periods listed, what do you believe will happen to the level of involvement of top management in the decision making process for motivational events?

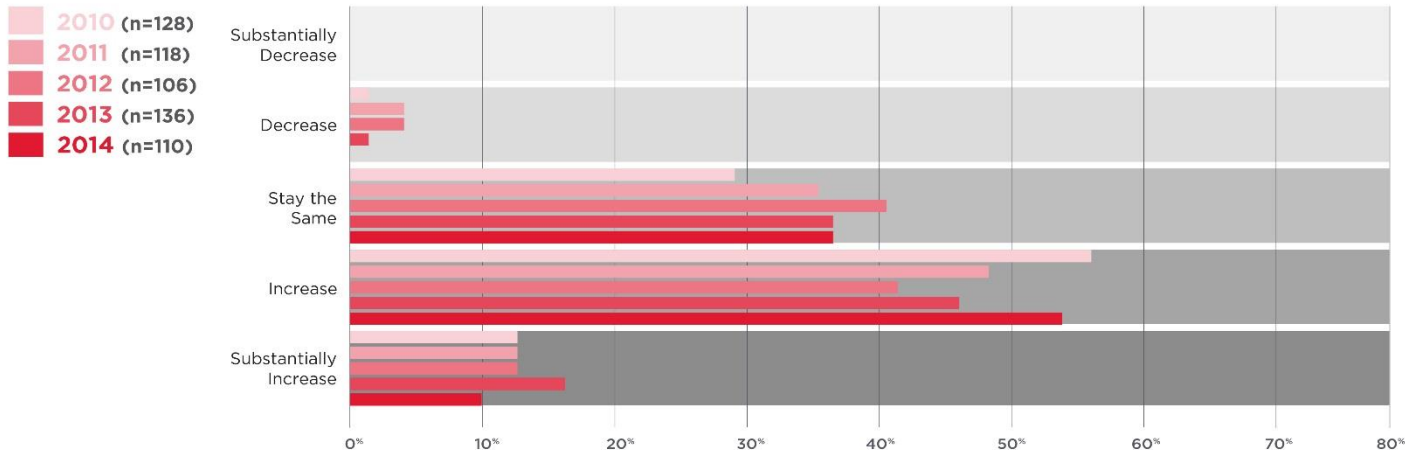
Next 6 Months



There is little change in the involvement of top management over the next 6 to 12 months

In the time periods listed, what do you believe will happen to the level of involvement of top management in the decision making process for motivational events?

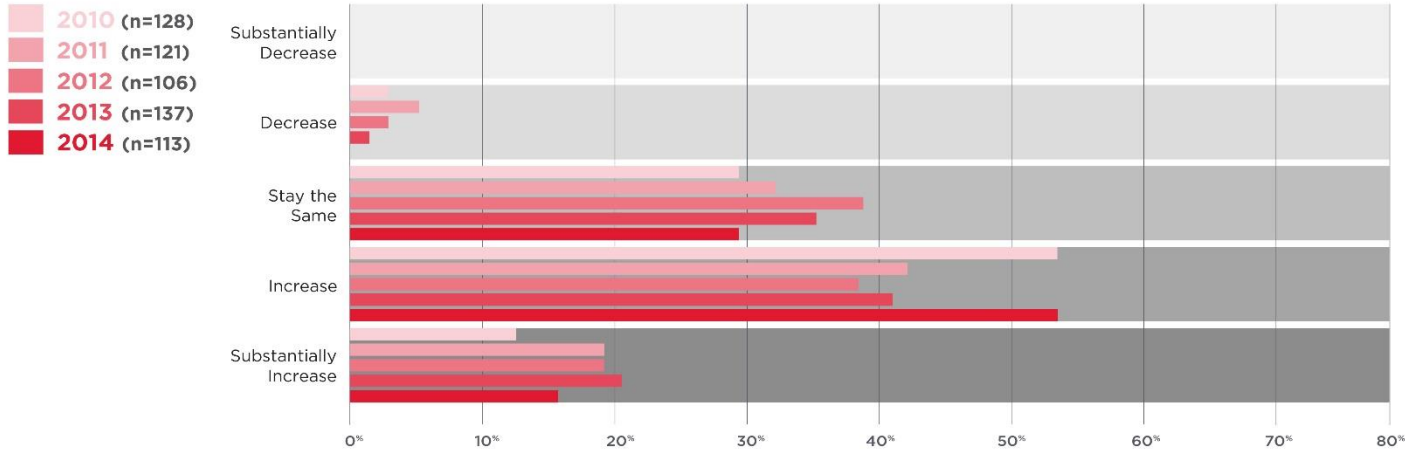
6 to 12 Months



The involvement of top management has leveled out. If there is any increase in the future, it will be minor.

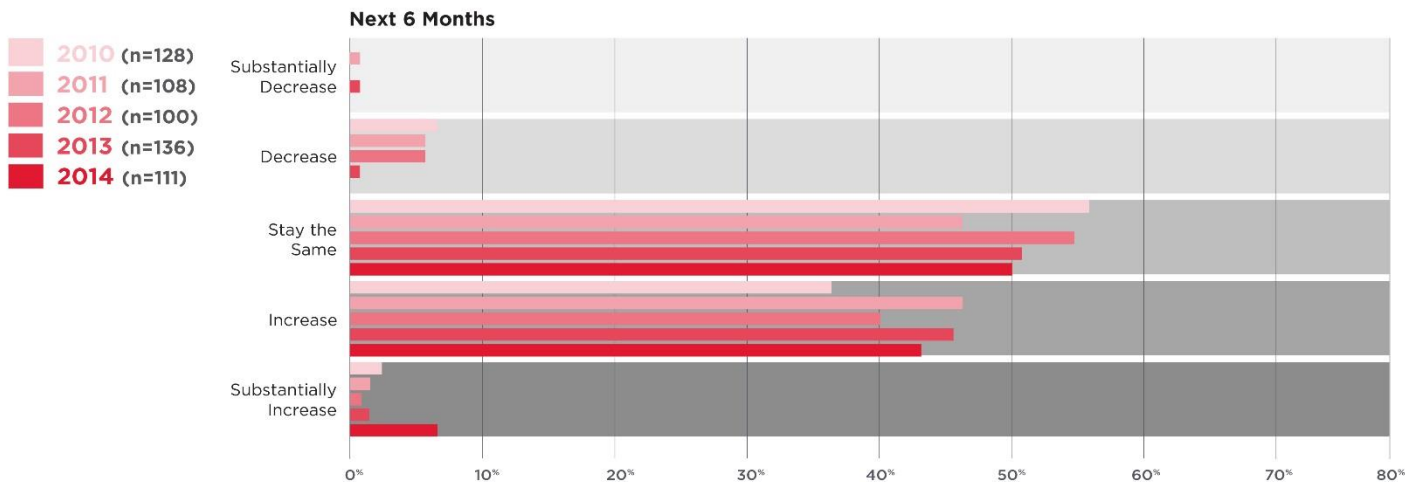
In the time periods listed, what do you believe will happen to the level of involvement of top management in the decision making process for motivational events?

1 to 3 Years



The overall use of external motivational tools will be fairly static over the next 12 months

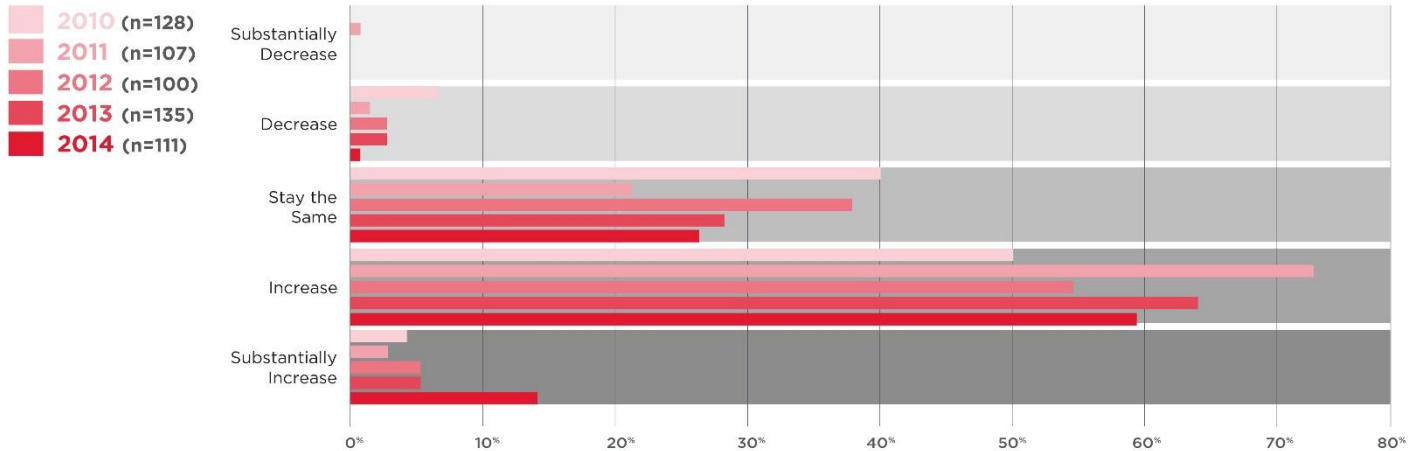
In the time periods listed, what do you think will happen to the overall use of external motivational tools?



There is little change in the use of external motivational tools over 6 to 12 months

In the time periods listed, what do you think will happen to the overall use of external motivational tools?

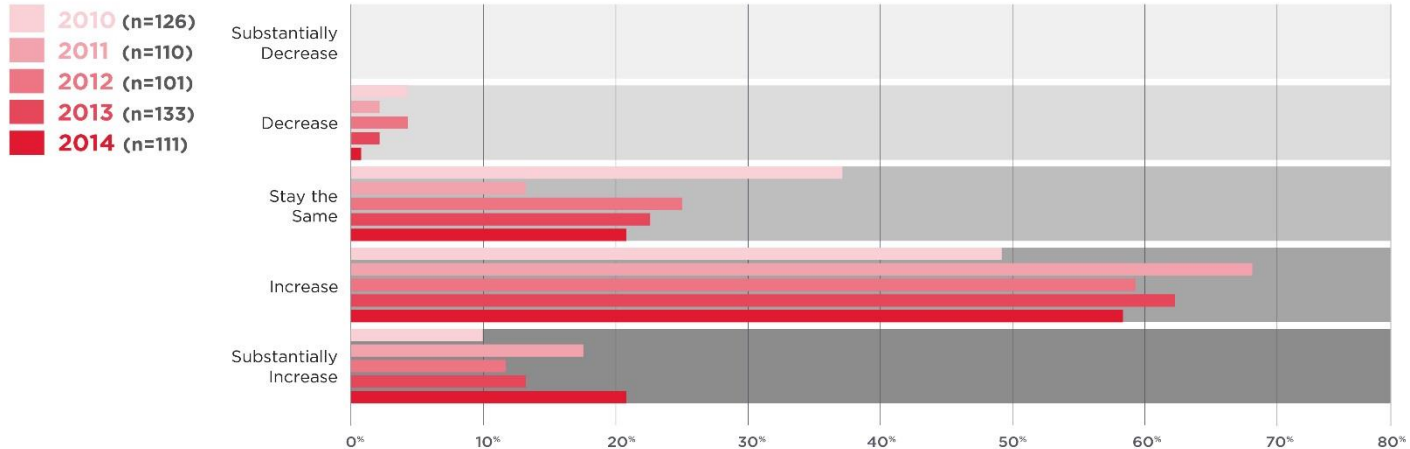
6 to 12 Months



Optimism over increases in the use of external motivational tools are consistent with concerns about the global economy.

In the time periods listed, what do you think will happen to the overall use of external motivational tools?

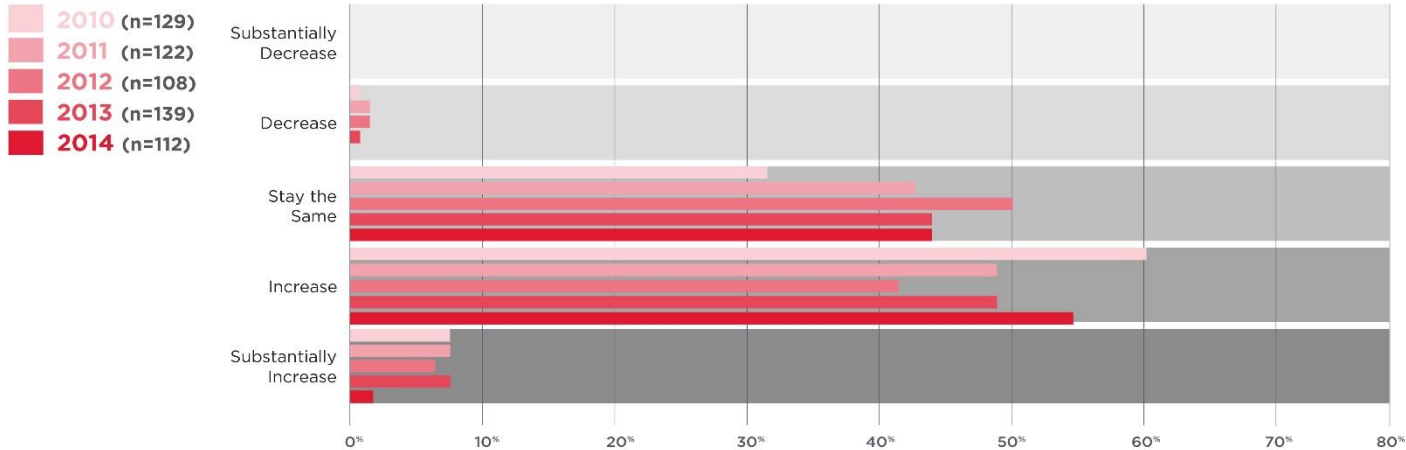
1 to 3 Years



There will be no change in the inclusion of business meetings and similar components in motivational events in the next 6 months

In the time periods listed, what do you think will happen to the inclusion of business meetings and other similar components in motivational events?

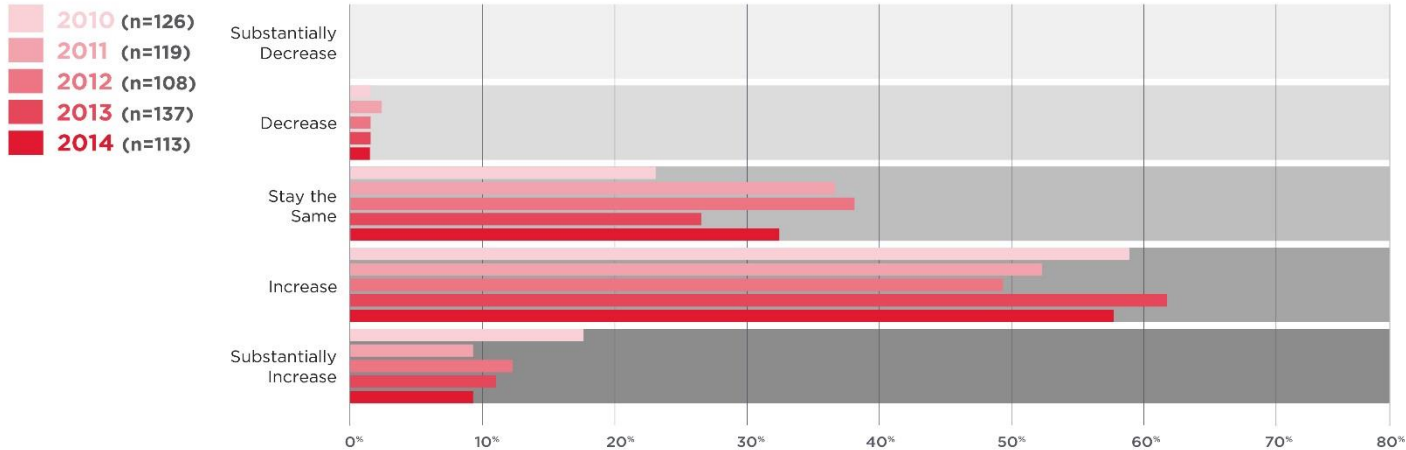
Next 6 Months



No change is expected in the inclusion of business meetings at motivational events in the 6 to 12 month future

In the time periods listed, what do you think will happen to the inclusion of business meetings and other similar components in motivational events?

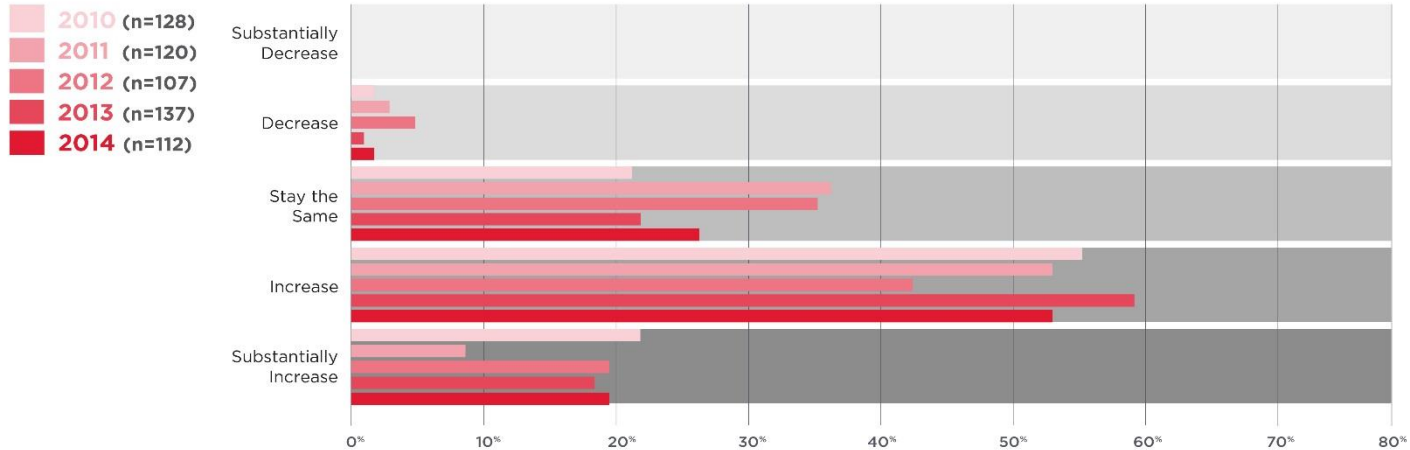
6 to 12 Months



If, in the future, the inclusion of business meetings increases it seems to be “just over the horizon”

In the time periods listed, what do you think will happen to the inclusion of business meetings and other similar components in motivational events?

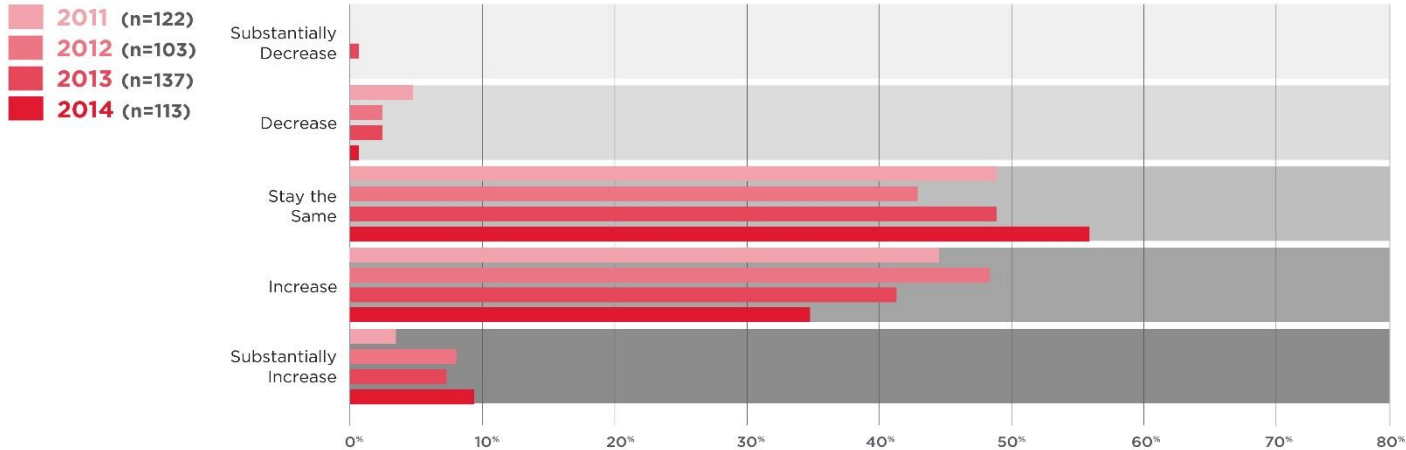
1 to 3 Years



Respondents who say that the use of CSR events will increase has steadily decreased

In the time periods listed, what do you think will happen to the desire to include CSR (Corporate Social Responsibility) events?

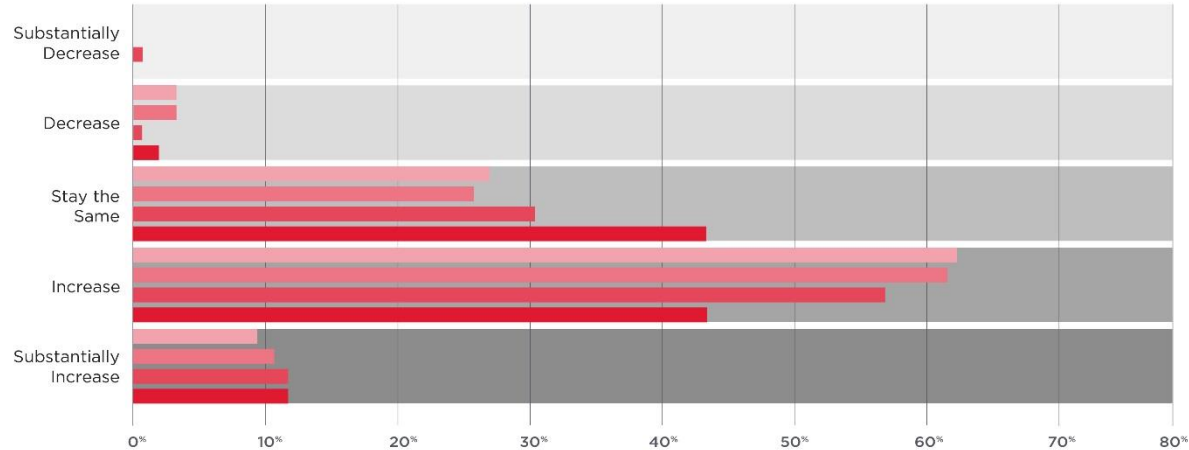
Next 6 Months



Respondents who say CSR events will stay the same has increased

In the time periods listed, what do you think will happen to the desire to include CSR (Corporate Social Responsibility) events?

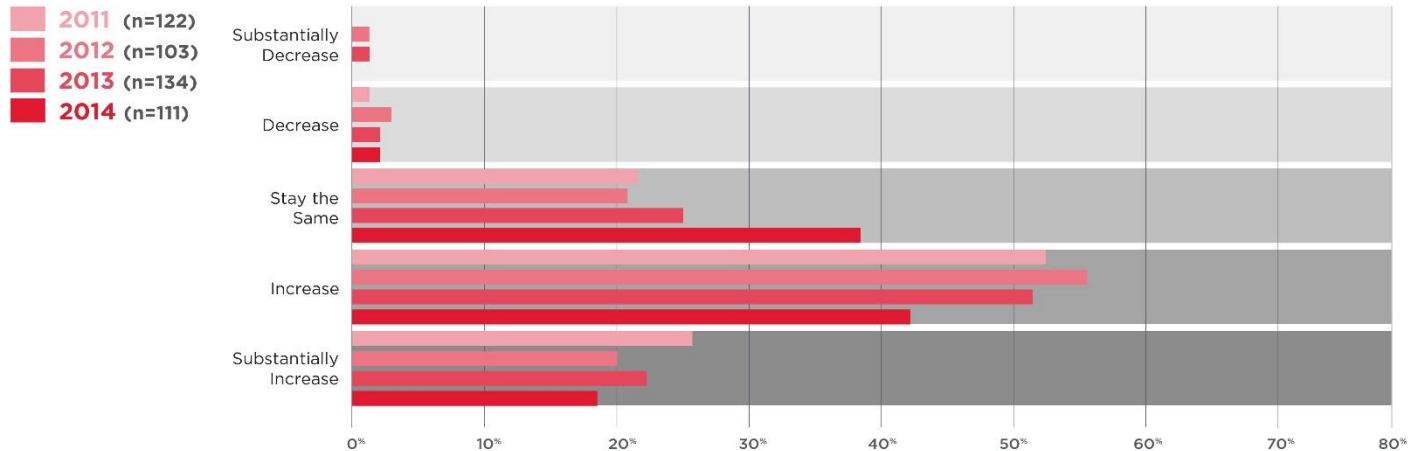
6 to 12 Months



Responses regarding the inclusion of CSR events implies that the CSR “revolution” has seemingly passed

In the time periods listed, what do you think will happen to the desire to include CSR (Corporate Social Responsibility) events?

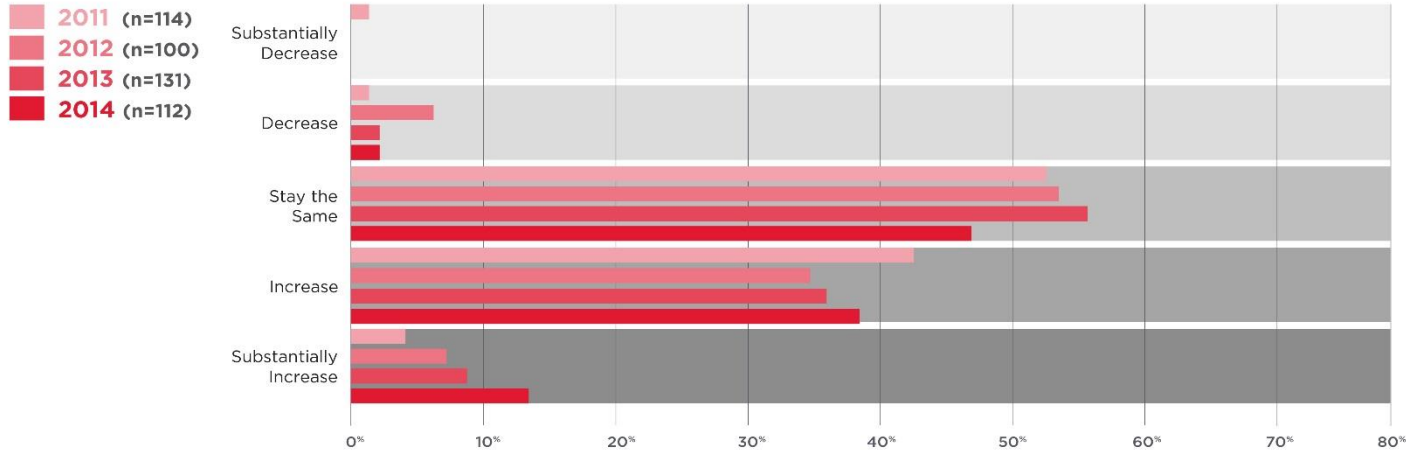
1 to 3 Years



The use of online booking systems is expected to increase over the next 6 months

In the time periods listed, what do you think will happen to the use of online booking systems for group services (i.e transportation)?

Next 6 Months

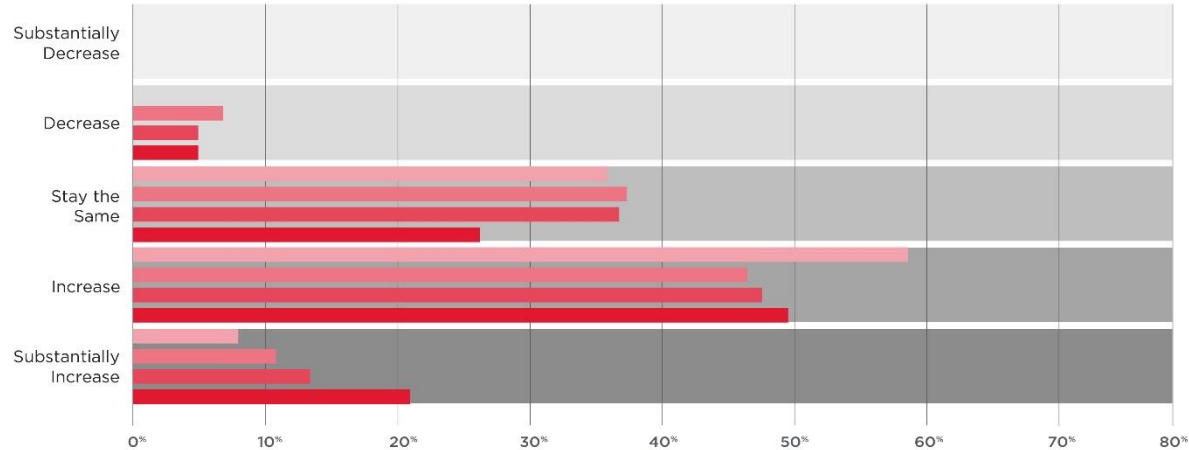


The use of online booking systems is expected to increase over the next 6 to 12 months

In the time periods listed, what do you think will happen to the use of online booking systems for group services (i.e transportation)?

6 to 12 Months

- 2011 (n=112)
- 2012 (n=100)
- 2013 (n=129)
- 2014 (n=111)

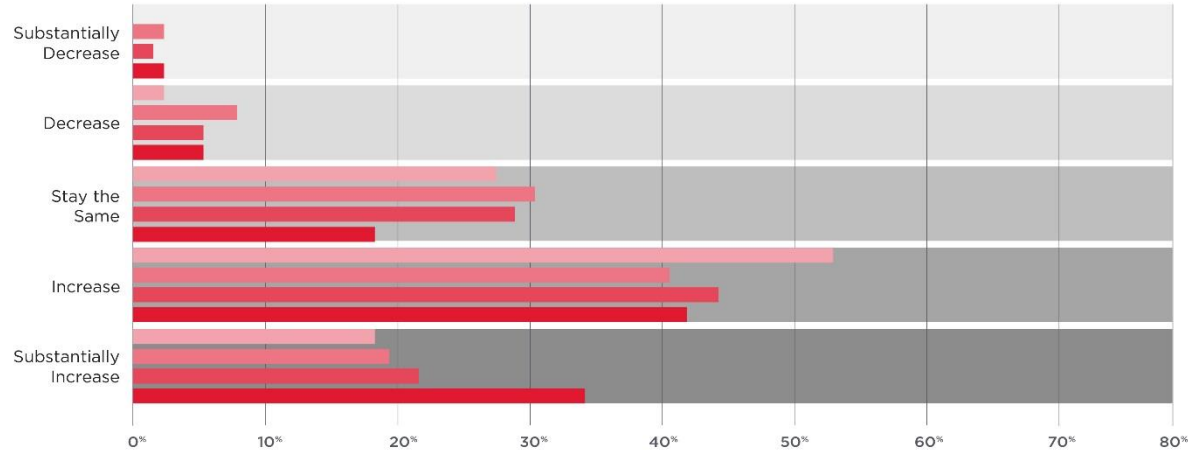


Respondents believe that the use of online booking systems will grow each year

In the time periods listed, what do you think will happen to the use of online booking systems for group services (i.e transportation)?

1 to 3 Years

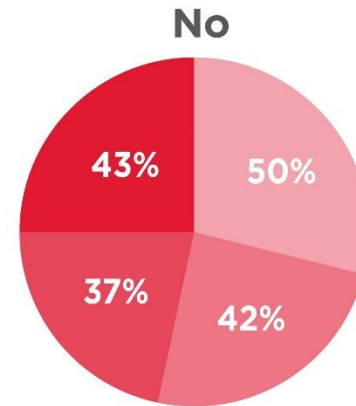
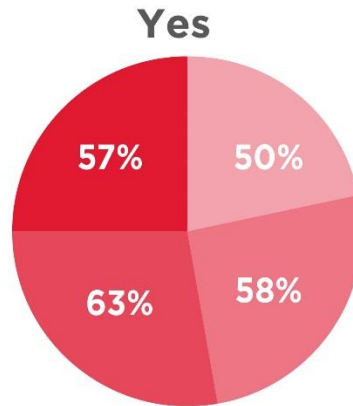
- 2011 (n=113)
- 2012 (n=99)
- 2013 (n=129)
- 2014 (n=112)



Slightly fewer respondents are asking for or providing more site selection/hotel placement-only services

Are you asking for or providing more site placement-only services than in previous times?

- 2011 (n=125)
- 2012 (n=109)
- 2013 (n=126)
- 2014 (n=107)



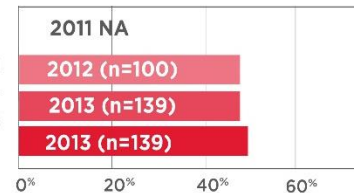
There is insignificant change in competition between incentive houses and site selection companies

Has your traditional competition changed in any of the following ways?
(Check all that apply.)

More competition between incentive houses and site selection companies for housing



Increased competition for suppliers from online booking services



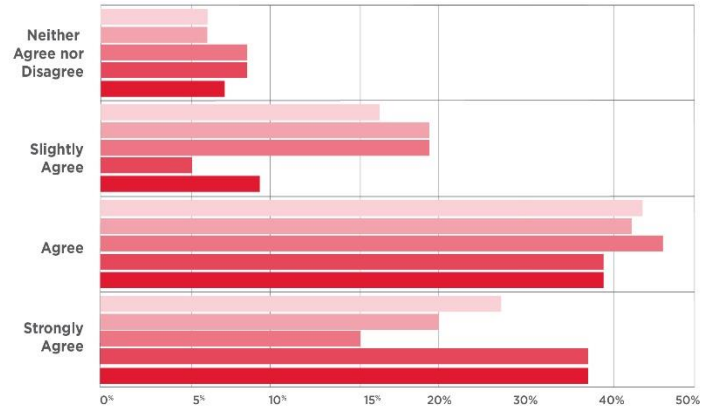
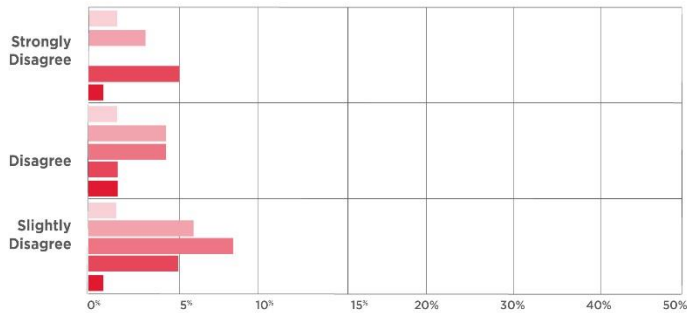
More competition between incentive houses and site selection companies for services



The effectiveness of each motivational tool varies based on the generation being motivated.
 Note: Motivational Tool is defined here as the medium of reward (e.g. travel, merchandise, etc.).

2010 (n=124)
 2012 (n=93)
 2014 (n=109)

2011 (n=126)
 2013 (n=129)



Baby Boomers are most motivated by extrinsic rewards; Millennials are less motivated although Traditionalists come close

Please rank the generations based upon how you think they are motivated by external rewards such as travel and merchandise.

- 2011 (n=131)
- 2012 (n=95)
- 2013 (n=125)
- 2014 (n=105)

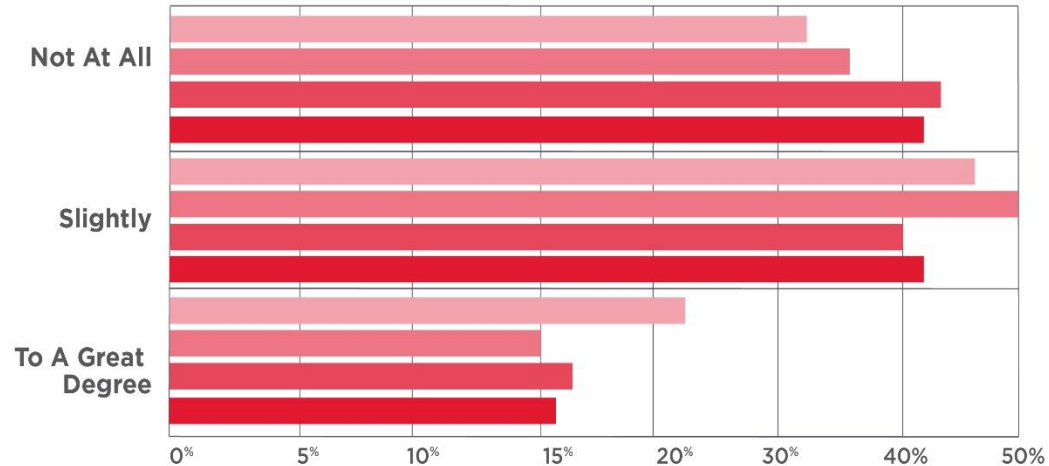
	#1 Votes	#2 Votes	#3 Votes	#4 Votes
Traditionalists	37%	21%	13%	29%
	35%	25%	8%	32%
	34%	15%	13%	38%
	27%	22%	14%	37%
Boomers	47%	32%	19%	2%
	51%	29%	19%	1%
	37%	34%	21%	8%
	44%	30%	24%	3%

	#1 Votes	#2 Votes	#3 Votes	#4 Votes
Gen X	38%	34%	23%	5%
	27%	35%	32%	6%
	20%	36%	36%	8%
	13%	35%	43%	9%
Millennials	33%	18%	19%	31%
	32%	17%	23%	28%
	23%	11%	22%	44%
	27%	11%	20%	42%

There is insignificant change in the impact of ease of obtaining/price of travel documents on destination selection

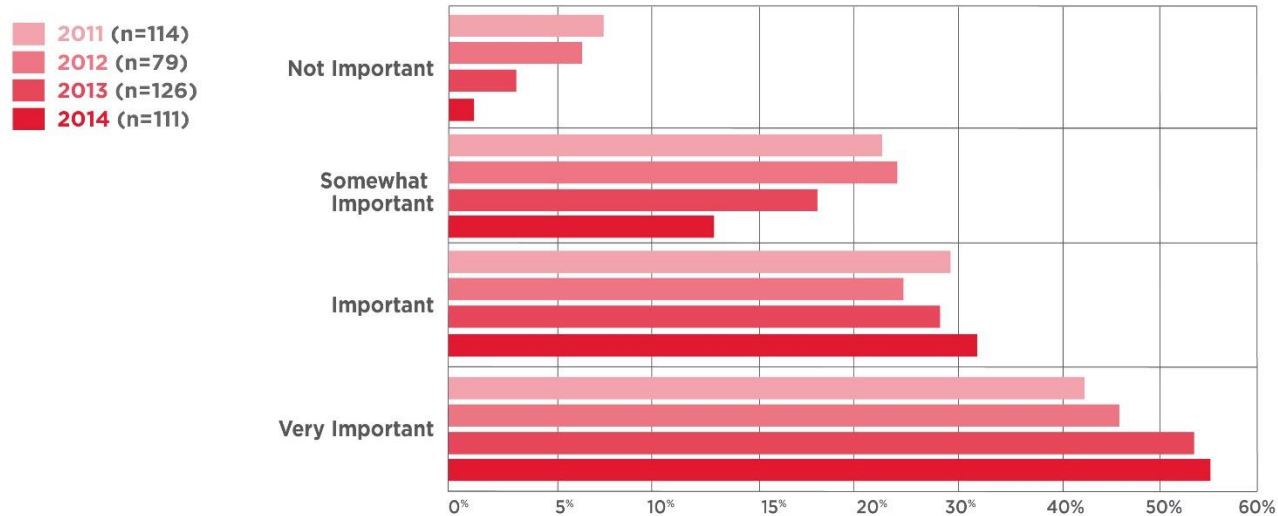
To what degree has the ease of obtaining and the price of visas, passports, and other necessary travel documents affected your destination selection?

■ 2011 (n=106)
■ 2012 (n=78)
■ 2013 (n=126)
■ 2014 (n=126)



The use of smart/mobile technology in program operations continues to be of great importance to respondents

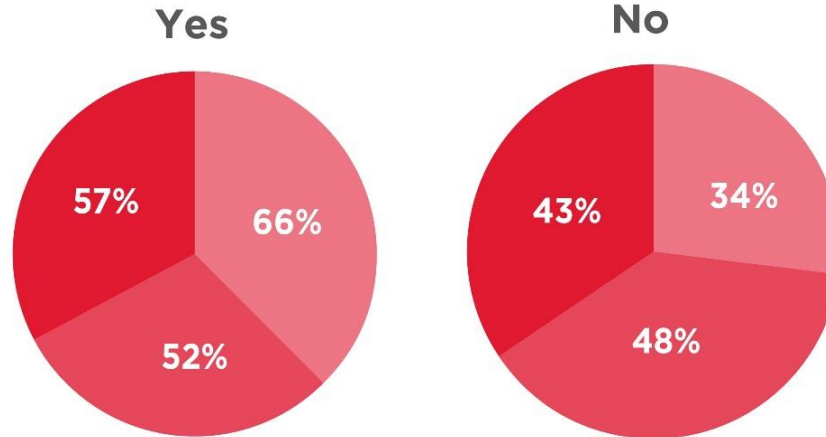
Is the use of smart/mobile technology by all personnel involved in program operations?



Value of currency against that of a potential destination is still not an important factor driving destination decisions

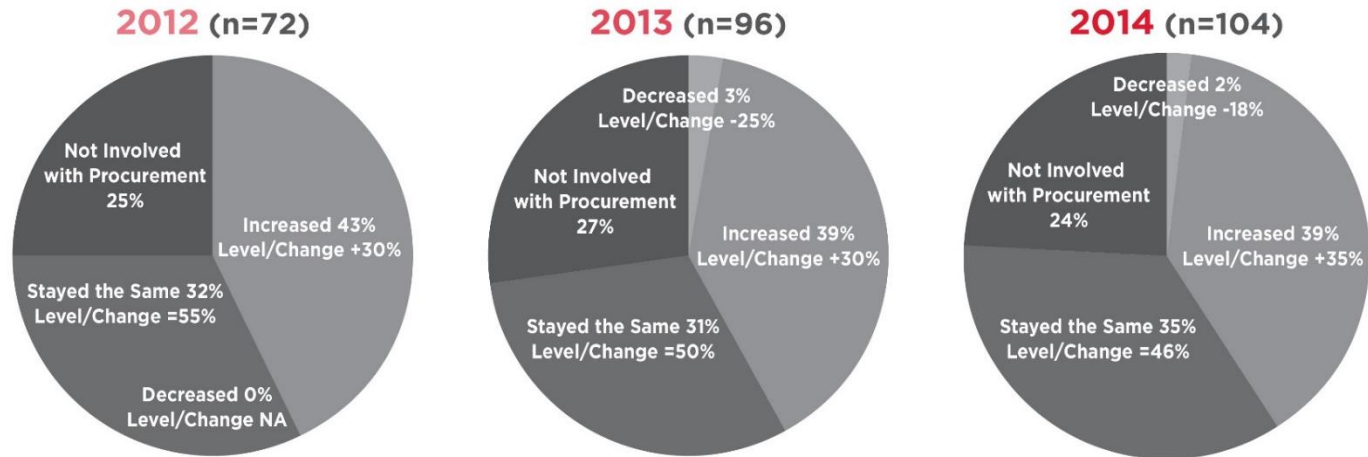
Do you decide on a destination based on the value of your currency against that of the potential destination being considered?

- 2012 (n=77)
- 2013 (n=122)
- 2014 (n=106)



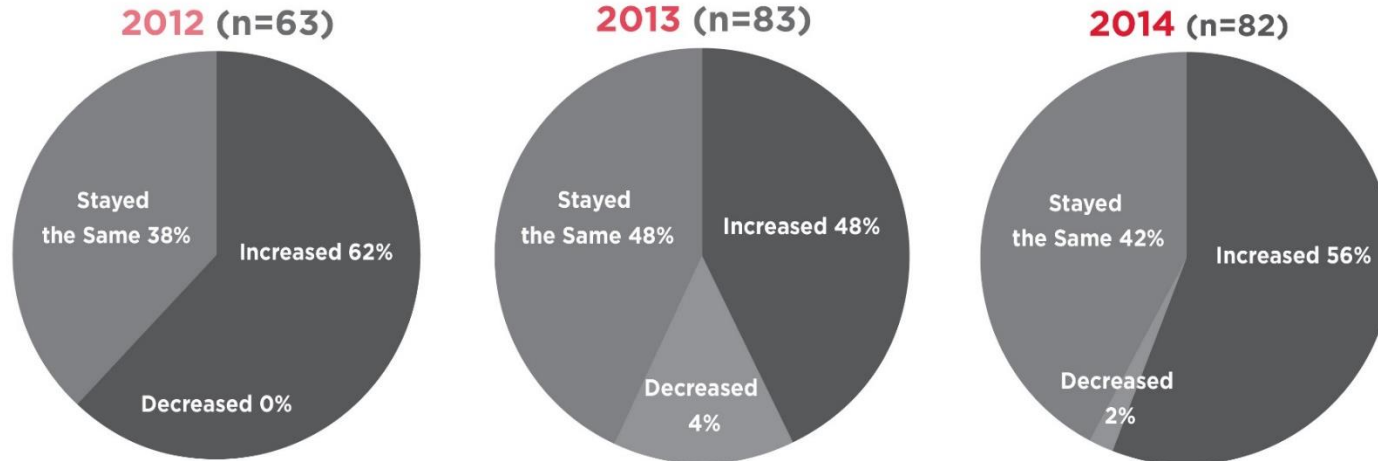
Involvement with procurement departments seems to be increasing slowly, but still increasing

How has your company's involvement with procurement departments changed?



Respondents who deal with procurement departments feel their expertise regarding incentives has increased

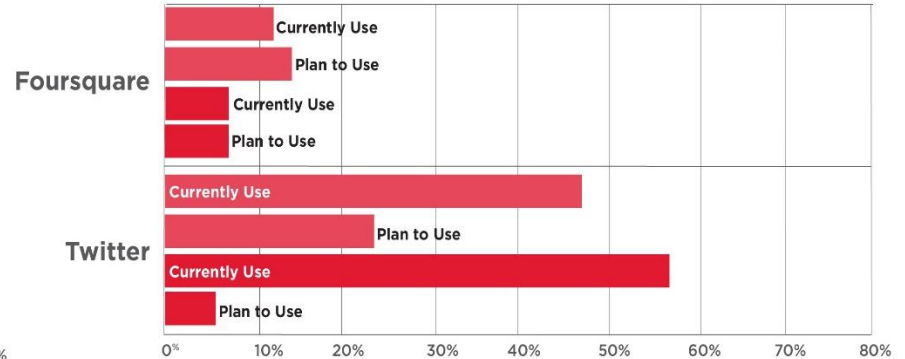
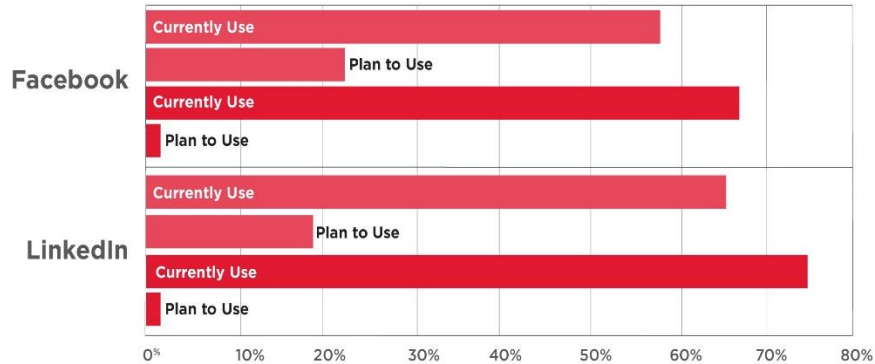
If you are involved with procurement departments, how has their expertise regarding the use/value of incentives changed?



The use of social media platforms has peaked

Which social media platforms are you using or plan to use in the next year for marketing your company or your clients' incentive programs?

■ **2013** (n=142)
■ **2014** (n=119)



The majority of respondents measure the effectiveness and value of utilizing social media

Are you measuring the effectiveness or value of utilizing social media?

■ 2013 (n=116)
■ 2014 (n=107)

