

DESTINATION INSITES

Pioneering Insights for Destination Excellence



DESTINATION
THE CHANGING FACE
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DESTINATION INSITES:

Pioneering Insights for Destination Excellence

Destination inSITES is brought to you by SITE Foundation

SITE Foundation is a US-based 501(c)(3) nonprofit organization. It drives the business case for incentive travel and motivational experiences by raising funds that support education and professional development; research and content; and grants, scholarships, and other activities. Since its formation in 1987, SITE Foundation has invested over USD \$10 million in the incentive travel industry.

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A NOTE FROM SITE FOUNDATION

SITE Foundation has always been steadfast in its mission to advance the understanding and value of incentive travel through education and research.

With the release of Destination inSITES, we are proud to add another essential chapter to our acclaimed inSITES series. Following in the footsteps of previous studies — Corporate inSITES, Leadership inSITES and Participant inSITES — this fourth installment provides unparalleled insights into the factors influencing destination selection in 2025 and beyond.

Research has been the cornerstone of our efforts, empowering professionals across the incentive travel ecosystem with actionable data and insights.

Previous editions of the inSITES series tackled a range of pivotal topics, seeking input initially from corporate planners of incentive travel experiences; then going to the C-suite and investigating the impact of incentive travel on company revenues and culture; and then channelling the views and impressions of qualifiers, the actual participants who win incentive travel experiences.

With each study, we seek to illuminate the road ahead, providing clarity in an ever-changing events industry landscape. Destination inSITES is no exception. This study delves into the preferences and priorities of corporate buyers and agencies, revealing critical trends in safety, connectivity, infrastructure, and new focus on budget and value for money. Importantly, it highlights the need for destinations to evolve in response to new challenges and opportunities.

SITE Foundation is proud to invest in this study. By supporting research like Destination inSITES, we are enhancing the incentive travel profession and underscoring the economic and social value of this transformative business tool.

SITE Foundation and the Board of Trustees extend our heartfelt gratitude to the supporters, collaborators, and contributors who make this important work possible. Together, we're shaping the future of incentive travel, one insight at a time.



Stan Hershenow
2024 SITE Foundation President

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INTRODUCING DESTINATION INSITES

As the fourth installment in SITE's acclaimed inSITES series, Destination inSITES offers a data-driven exploration of how incentive travel program destinations are chosen. This landmark study provides vital intelligence on key factors influencing incentive destinations selected by corporate buyers and agencies.

From uncovering the drivers behind destination choice to assessing the role of budget, marketing strategies, and best practices, Destination inSITES delivers actionable insights for DMOs, DMCs and other destination suppliers. This study reveals emerging preferences for new and unique destinations, highlighting a growing focus on safety, security, and cost considerations.

Drawing on exclusive data from SITE's own Incentive Travel & Motivational Events (IT&ME) survey and the annual Incentive Travel Index (ITI), Destination inSITES provides unparalleled clarity on what matters most to planners.

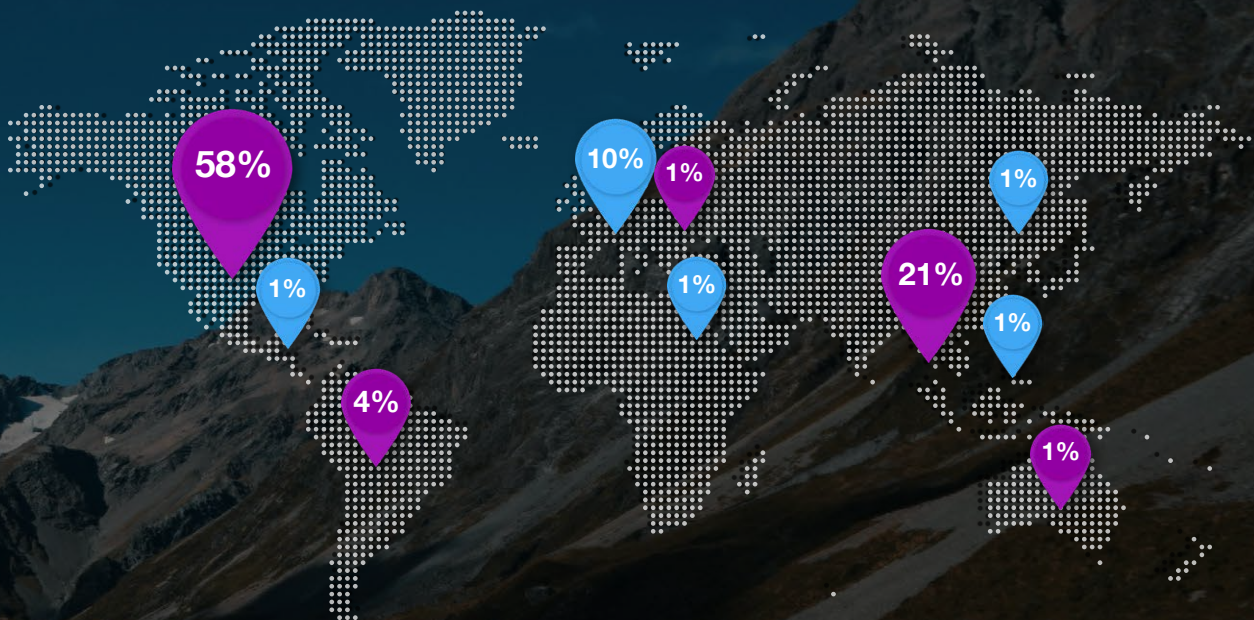
This essential resource equips you to align with buyer needs and adapt to a rapidly evolving incentive industry landscape.



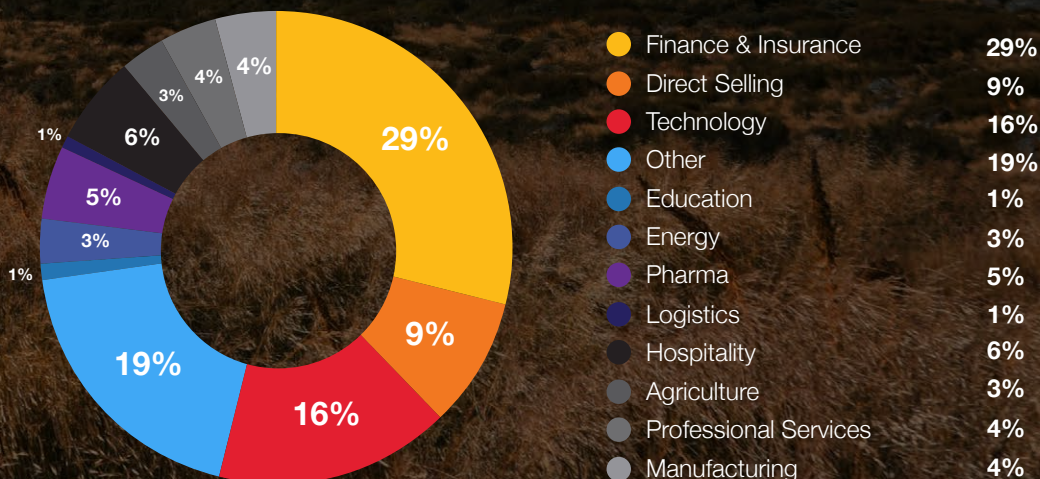
WHO DID THE DATA COME FROM?

Data analyzed in this study comes from two principal sources: SITE's own Incentive Travel & Motivational Events survey (fielded March–May 2024) of 100 corporate, end-user incentive travel buyers; and SITE and the Incentive Research Foundation's joint annual study, the Incentive Travel Index (fielded most recently, at time of this report's publication, from May–July 2024).

IT&ME - Geography & Industry Sector



ITI 2024 - Geography & Industry Sector



WHAT FACTORS ARE IMPACTING DECISIONS FOR 2025 AND BEYOND?

While there have always been highly subjective and almost random reasons why destinations are selected to host incentive travel programs (“the CEO’s partner always wanted to go there!”), by and large, destination selection typically boils down to six core criteria:

1. Access/connectivity
2. Infrastructure
3. Value for money
4. Destination appeal
5. Support services in destination (DMCs)
6. Destination security and safety

For some industry verticals, financial support is also a criterion.

SITE has used these criteria, and variations thereof, for a number of years across many surveys, including the *Incentive Travel Index (ITI)*, our joint annual study with the Incentive Research Foundation (IRF).

For incentive travel program organizers, the top-ranked criterion tends to be “destination appeal,” as we saw again from the nearly 100 corporate buyers who took the *Incentive Travel & Motivational Events (IT&ME)* survey in Q1 2024.

Interestingly, and not surprisingly, safety, health & security, consistently placing sixth or lower pre-2020, now ranks solidly in the top three — placing in between infrastructure (incentive quality hotels, venues) and connectivity (airlift, ease of access) in the 2024 IT&ME survey. For this cohort of corporate buyers, value for money was not a top three criteria.



Figure 1 – Destination selection criteria rankings, IT&ME Survey (SITE), March 2024

The growing importance throughout 2024 of safety and security, as well as changing attitudes toward cost, is perhaps best illustrated in reference to a question from the 2024 Incentive Travel Index (ITI) that asked, “How do you see destination considerations changing as you plan future events?”

Changing destination considerations

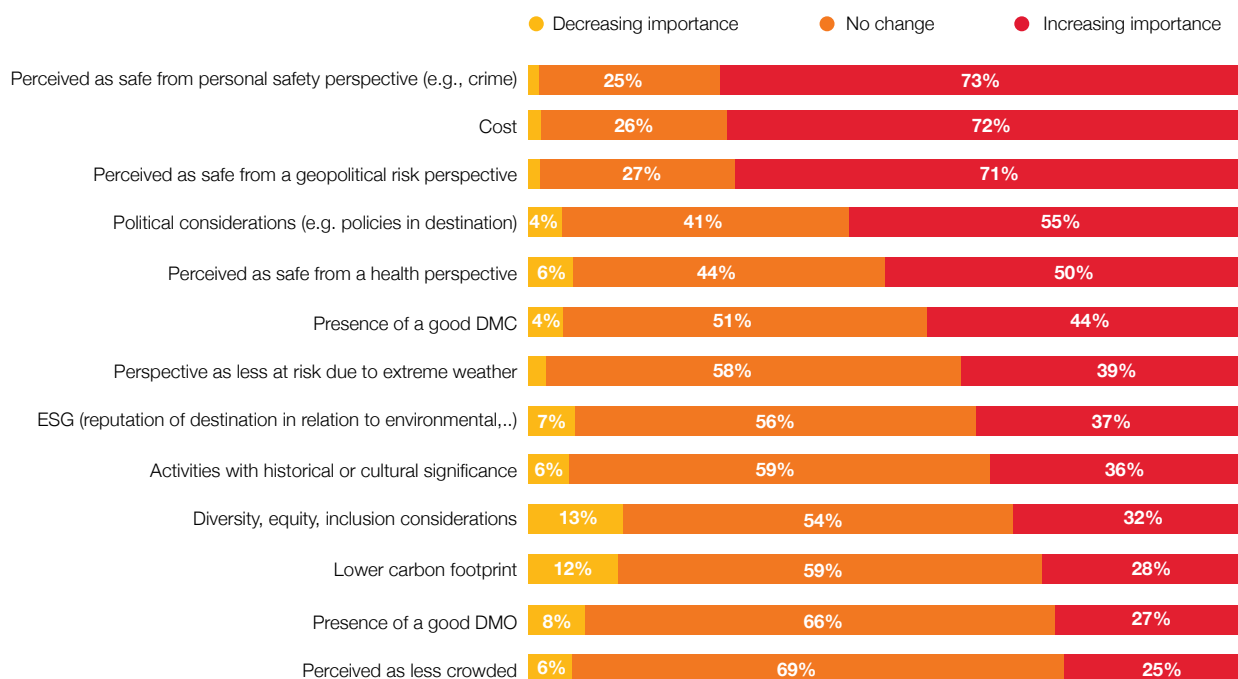


Figure 2 – Changing Destination Considerations, ITI Survey (SITE & IRF), August 2024

Here, four of the top five criteria increasing in importance relate to safety, security and risk exposure, with a majority of respondents also ranking cost considerations in second position.

When it comes to changes in destination type, the 2024 ITI offers clear insights into what corporate and agency buyers are prioritizing for 2025 and beyond.

Respondents were asked to evaluate 12 destination types — including various cruise options — and indicate whether their use of each type would increase, decrease, or remain the same in their future plans.

Destination type changes

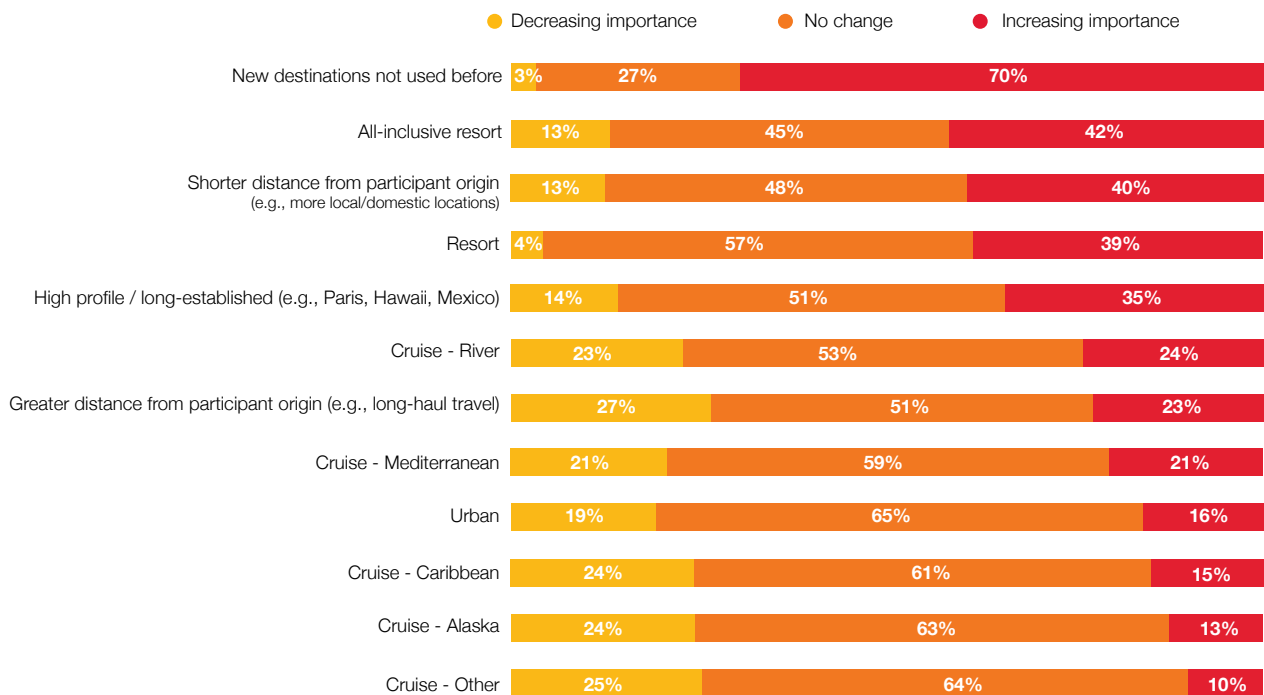


Figure 3 – Destination type changes, ITI Survey (SITE & IRF), August 2024



Data analysis revealed that when the percentage of buyers planning to decrease usage was subtracted from those planning to increase it, only four destination types achieved a net positive score of 25 or more. These top-performing categories are highlighted below.



Figure 4 – Ranking of destination types by percentage, ITI Survey (SITE & IRF), August 2024

While organizers across all regions align around new destinations as the top choice for “destination types,” there are significant differences between US and EU buyers when it comes to the use of resorts.

The incidence of use of resorts by EU buyers is half that of US buyers, and all-inclusive resorts do not feature for EU buyers at all.



Additionally, short-haul destinations rank strongly in second position for EU buyers, exceeding the US percentage by a factor of 3.

Increasing use by destination type / regions

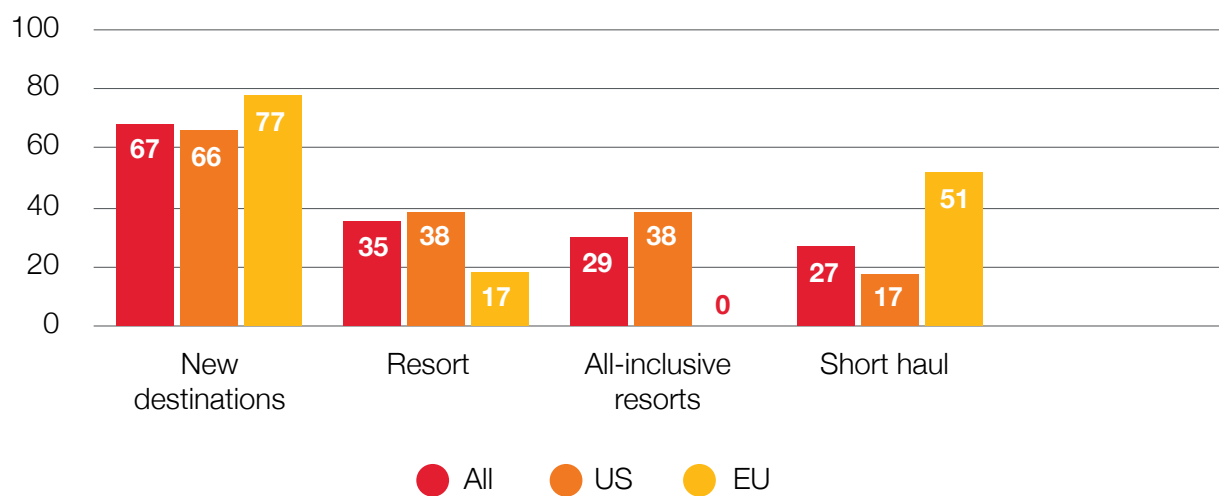


Figure 5 – Highest ranking of destination types by region, ITI Survey (SITE & IRF), August 2024

When asked about absolute, sine qua non requirements for incentive destinations, the most popular must-haves according to corporate planners who took the IT&ME study were proof that everyone would be treated equally and that accommodations would be luxury and 5 star.



Figure 6 – “Must-haves” in an incentive program, IT&ME Survey (SITE), March 2024

2025 Destination Selection Factors



Security, safety and risk



Cost/value for money



Diversity, equity, inclusion, accessibility, and belonging (DEIAB)

All buyers are seeking new destinations, not previously used — great news for tier 2 and tier 3 locations. Additionally, EU buyers want short-haul destinations, while US buyers want resorts: particularly those with all-inclusive programs.”

IS BUDGET THE KEY DRIVER OF DESTINATION CHOICE AND PROGRAM DESIGN IN 2025 AND BEYOND?

Regarding the changes in destination types (see figure 3), ITI 2024 also asked respondents about the reasons behind their choices. The key driver, ranked first or second across all supplementary answers, was budget.

Reasons for increasing all-inclusive use

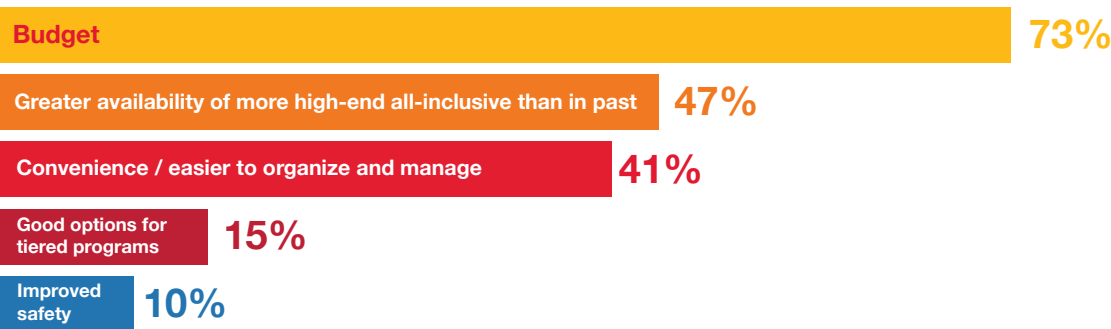


Figure 7 – Reasons for increasing all-inclusive use, ITI Survey (SITE & IRF), August 2024

Reasons for increasing Mediterranean cruise use

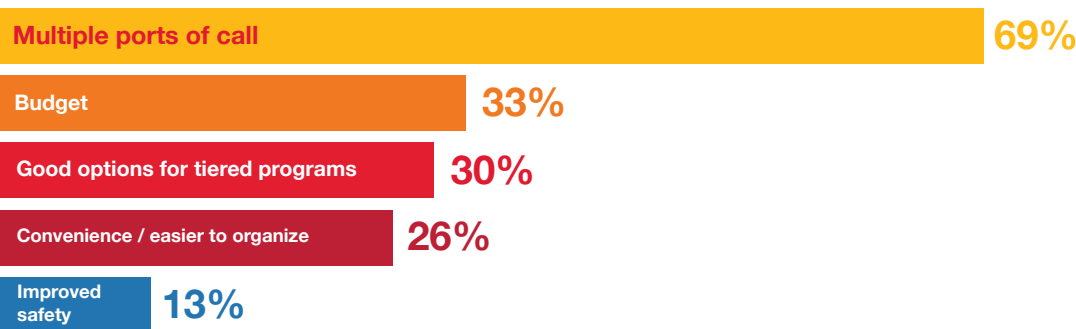


Figure 8 – Reasons for increasing Mediterranean cruise use, ITI Survey (SITE & IRF), August 2024

The primacy of budget (and related matters around cost and value for money) are a feature of ITI 2024 not found to the same extent in previous editions of the study.

For 2025 and beyond, it's all about the money — with inflation and cost increases also called out as key challenges, both in the short and long-run.

Future challenges for incentive travel professionals

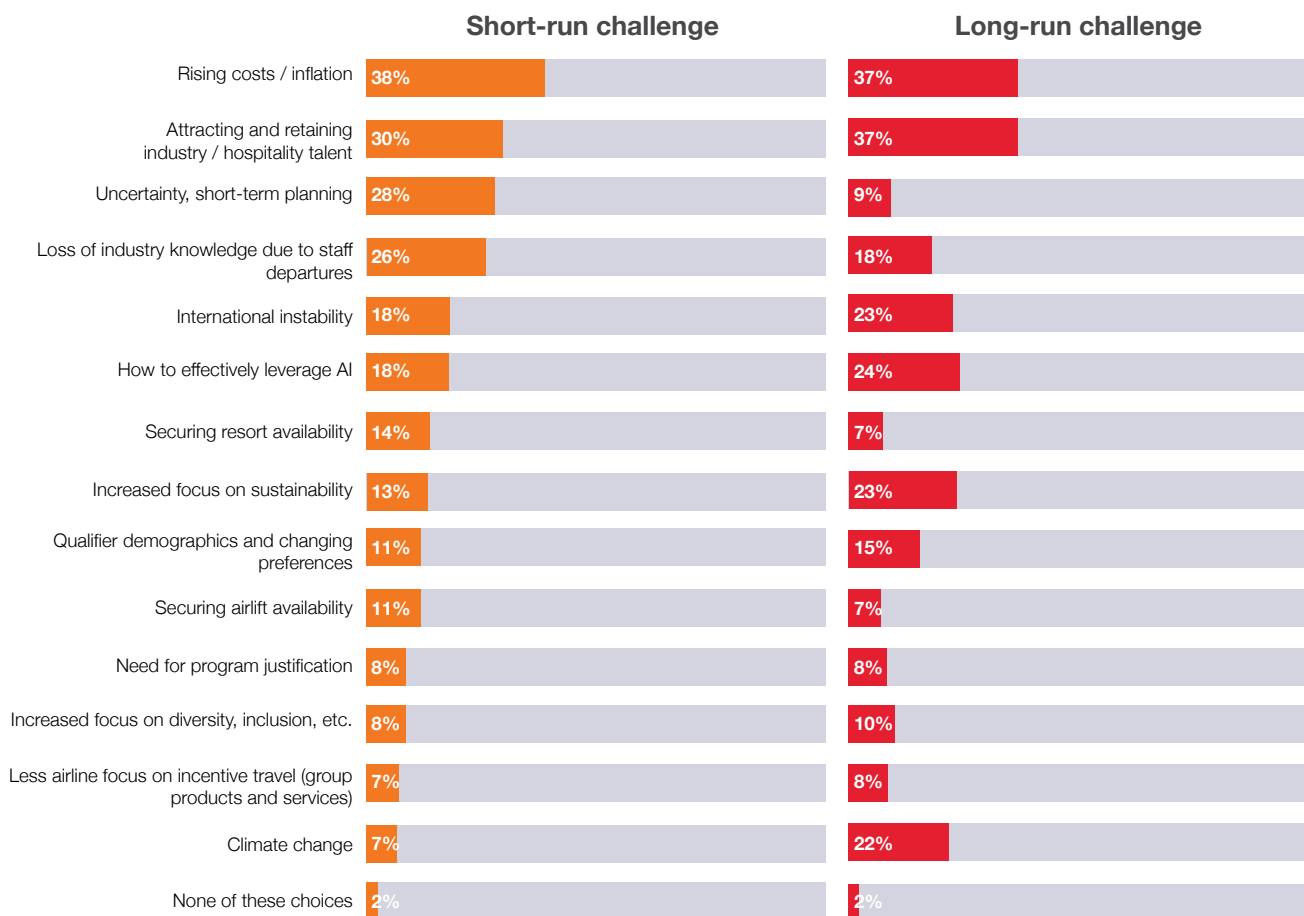


Figure 9 – Future Challenges – Short & Long-Term, ITI Survey (SITE & IRF), August 2024

While the vast majority of incentive travel organizers across all regions and sectors expect qualifier numbers in 2025 to be the same, above, or significantly above 2024 figures, there is considerably less positive sentiment in regard to budgets and whether they'll trail, match or exceed inflation.

Less than one-quarter of corporate end users and incentive agency professionals who responded to the 2024 ITI survey stated that budgets will exceed inflation in 2026, for example, and another one-fifth say they simply do not know.

If an increase in qualifier numbers signifies success in demonstrating the business value of incentive travel, then the belief that truly transformative incentive travel experiences can be achieved with shrinking budgets will ultimately lead to failure.

If concerns around budgets and funding are contributing significantly to destination choice, they are also impacting incentive travel program design — with increasingly bigger slices of the overall budgeting pie consumed by food and beverage, accommodation and air, leaving little remaining for activities and experiences in the destination: surely the heart, core, and soul of truly impactful, extraordinary travel experiences.

Program budget allocation (2025)

Average (%)

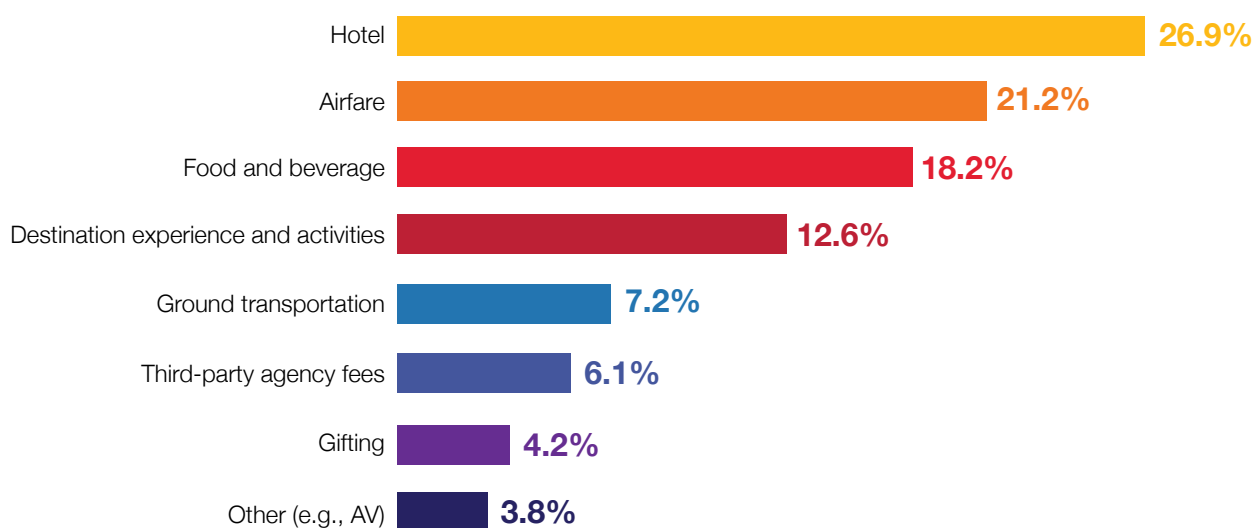


Figure 10 – Program Budget Allocation by percentage, ITI Survey (SITE & IRF), August 2024

Top Challenges

Short Term		Long Term	
1	Rising costs / inflation	Rising costs / inflation	
2	Attracting / retaining talent	Attracting / retaining talent	
3	Uncertainty	How to leverage AI	

If an increase in qualifier numbers signifies success in demonstrating the business value of incentive travel, then the belief that truly transformative incentive travel experiences can be achieved with ever-shrinking budgets will ultimately lead to failure.”

WHAT'S WORKING IN DESTINATION MARKETING?

Destinations, and the suppliers within them, invest significantly in highlighting their appeal to organizers of incentive travel programs, using all traditional (and sometimes non-traditional) marketing channels available.

But how crucial, helpful, or otherwise are destination partners to incentive travel planners, working outside of our industry directly for corporations?

Attitudes toward supplier partners

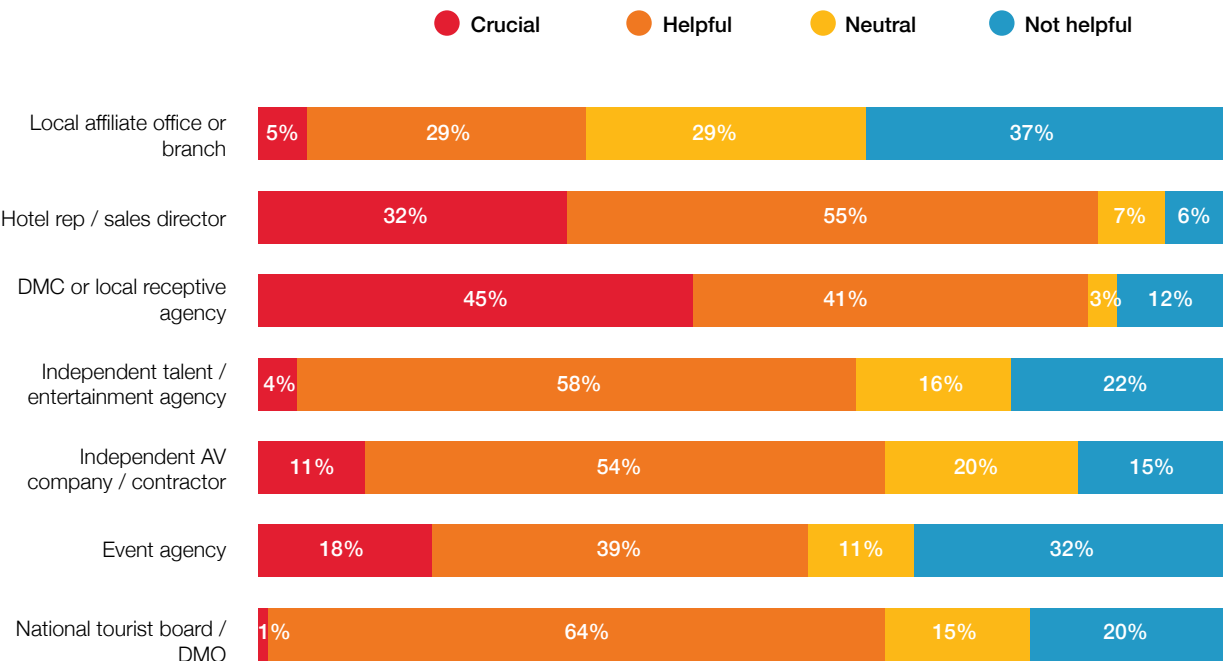


Figure 11 – Attitudes towards supplier partners, IT&ME Survey (SITE), March 2024



While destination marketing organizations (DMOs) come out on top in the 2024 IT&ME study in terms of how helpful they are (64%), conversely, they come out on bottom in terms of how crucial they are (1%). For corporate planners, destination management companies (DMCs) and hotel sales directors are seen as most crucial.

The same study asked corporate planners to rank their preferred sources of information for destination selection in terms of effectiveness and efficiencies. In this regard, industry trade show participation — shows like IMEX, IBTM World, etc. — emerges in the top spot by a significant measure. While personal recommendations and in-person visits to destinations through familiarization trips also rank high, it's worth calling out the crucial importance of having a strong digital presence and website, too.

Preferred industry sources

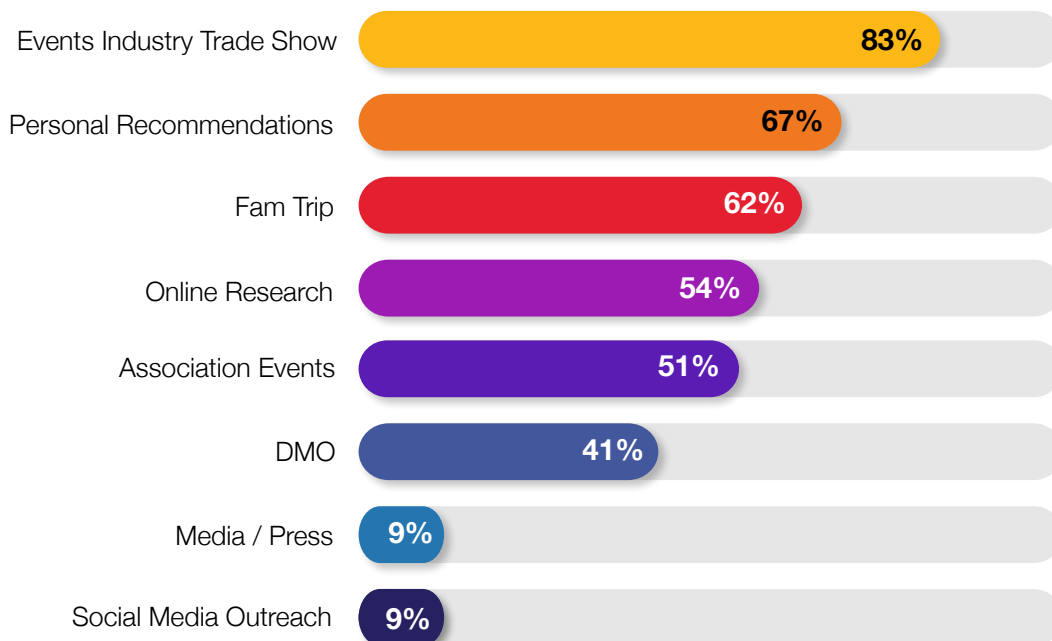


Figure 12 – Preferred industry sources, IT&ME Survey (SITE), March 2024



Another question from the 2024 Incentive Travel Index asked corporate and agency buyers about the most valuable support they received from DMOs.

The results, interestingly, revealed no single response exceeding 50 percent, indicating a lack of consensus and no clear patterns emerging or strong preferences for any specific type of support.

Support for DMOs

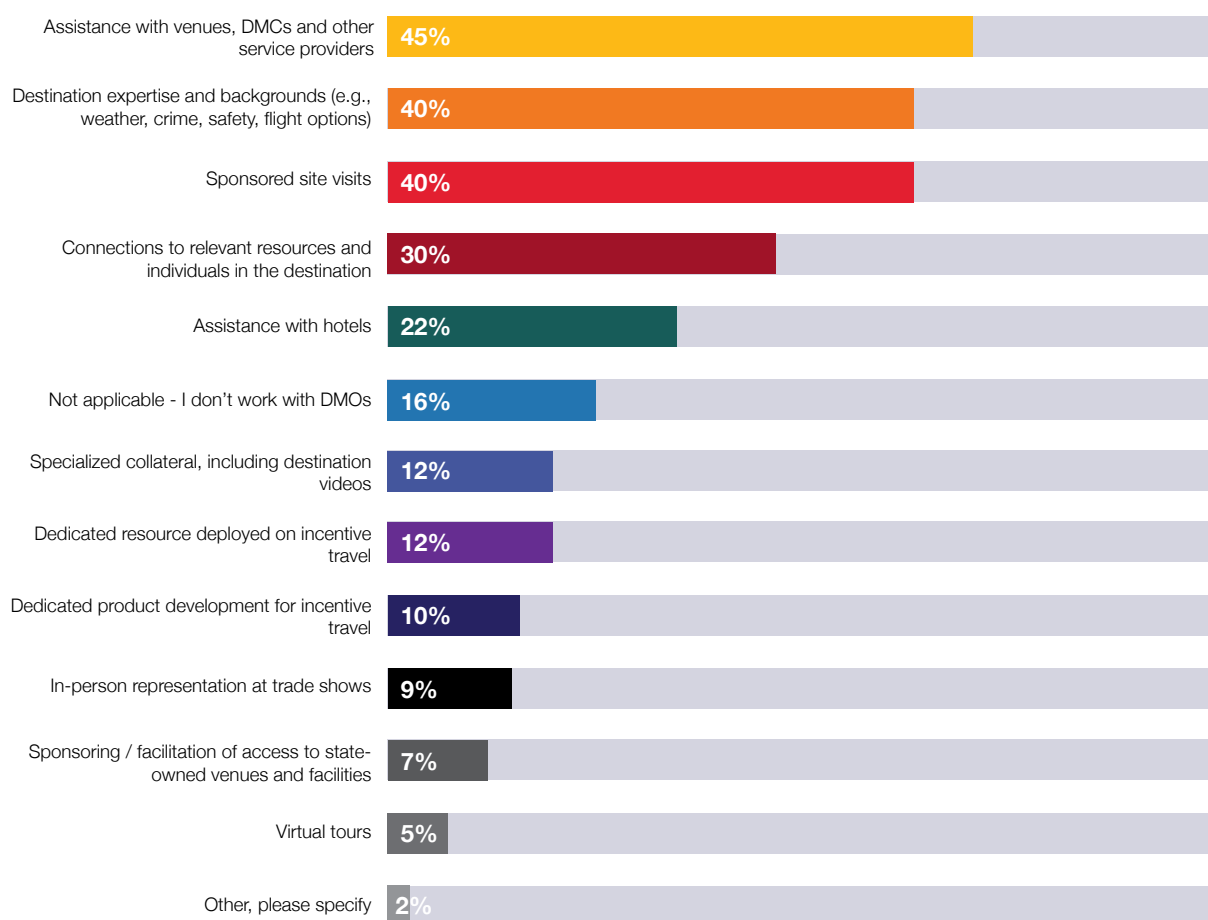



Figure 13 – Preferred DMO supports, ITI Survey (SITE & IRF), August 2024

Also interestingly halfway down the hierarchy of responses at 16% is “Not applicable — I don’t work with DMOs.” This matches the findings of the IT&ME survey, where DMOs place toward the bottom when ranking preferred industry sources.

When it comes to association congresses, conventions and conferences (the “C” in MICE), DMOs are the known, go-to resource for destination expertise and experience. However, when it comes to the “I” in MICE — incentive travel — DMOs, in general, appear neither to have established, nor communicated the indispensable role they play as mediators of the destination for buyers of incentive travel experiences.



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IS INCENTIVE TRAVEL REALLY ONLY 8% OF BUSINESS EVENT REVENUES IN DESTINATIONS?

The Incentive Travel Index (ITI) serves survey questions to five distinct industry sectors, including the DMO sector. In 2024, over 160 DMO professionals working in 30 destinations responded to the survey.

By absolute number of responses, the top 10 countries represented amongst these DMO professionals are:

- 1.** Canada
- 2.** Australia
- 3.** Switzerland
- 4.** New Zealand
- 5.** United States
- 6.** United Arab Emirates
- 7.** Slovenia
- 8.** Croatia
- 9.** Czechia
- 10.** Ireland

Other countries that responded, albeit in fewer numbers, include Spain, UK, China, Colombia, Thailand, Chile, Japan, and Portugal.

The lists above demonstrate that the DMO professionals who participated in the survey

represent destinations with a strong reputation as “incentive destinations.” This is evident in their responses, particularly regarding the significant percentage share of business events attributed specifically to incentives.

Various Events Industry Council (EIC) surveys¹ show that, based on global averages, incentive travel comprises around 8% of total business events activity, valuing its global spend at around \$116 billion USD.

However, for many destinations, incentive travel constitutes a much larger percentage of their overall business events activity, with some DMO respondents estimating that incentive travel is responsible for more than 50% of the total business events activity in their destinations.

Contrary to the 8 percent global average, destinations with a focus on and commitment to incentive travel, 65% of 2024 ITI respondents — or over 100 DMO professionals — estimated the market share of incentive travel at between 10% and 50% for their destinations.

¹ For example, Events Industry Council / Oxford Economics Global Economic Significance of Business Events (May 2023)

Share of incentive travel for DMOs

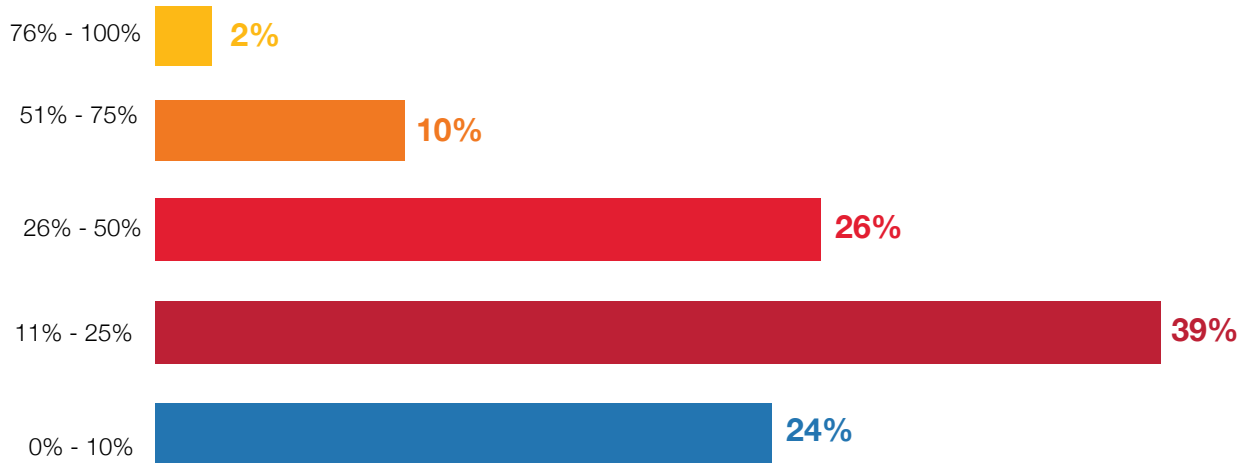
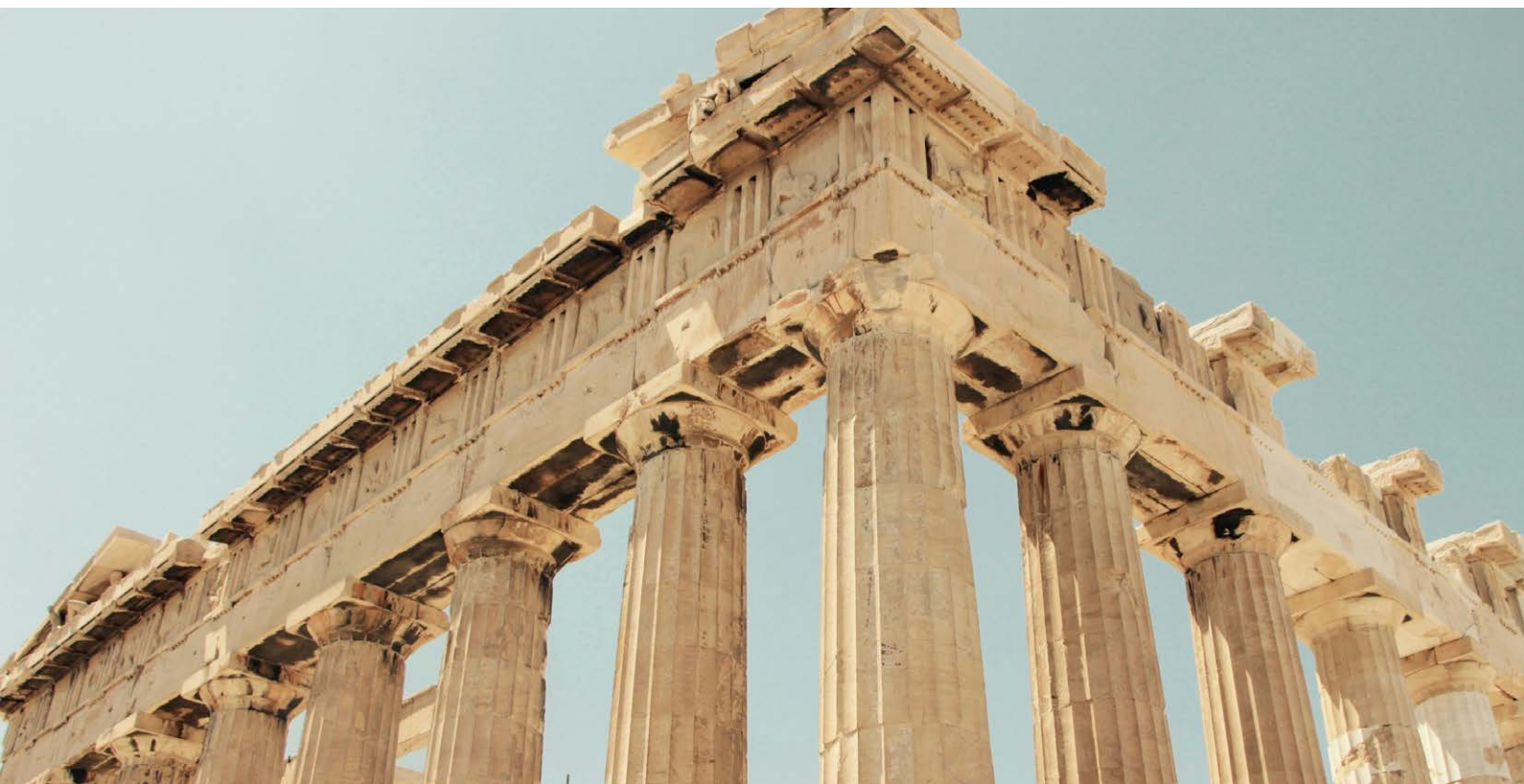


Figure 14 – Share of Incentive Travel for DMOs, ITI Survey (SITE & IRF), August 2024

These DMO professionals also provided responses regarding their marketing methodology. Sensibly, the top marketing channel identified by these experienced DMOs is identical to the top channel for marketing effectiveness identified by the 100 corporate planners who responded to the IT&ME survey.



Investment in specialized, dedicated marketing collateral (e.g., a signature destination video for incentive travel), while important, ranks relatively low. Instead, face-to-face channels like trade shows, industry association events, and site visits rank high, underscoring the vital importance of human relationships when it comes to building profile for a particular destination.



Method of destination marketing for DMOs

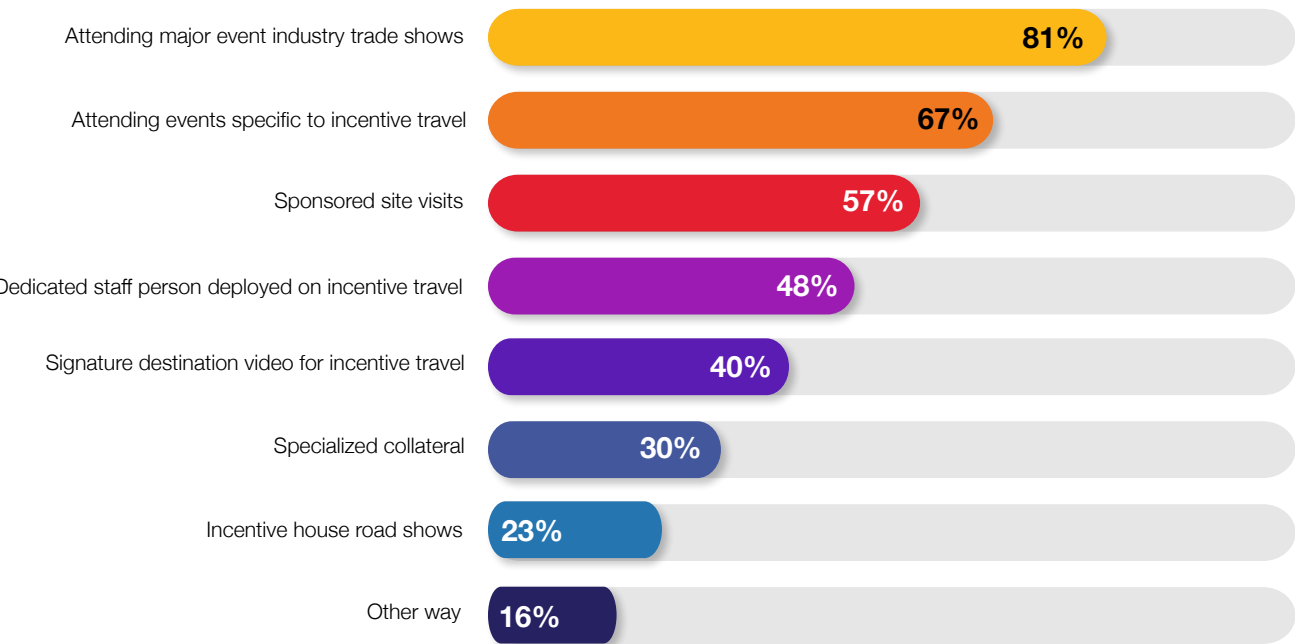


Figure 15 – Share of Incentive Travel for DMOs, ITI Survey (SITE & IRF), August 2024

“The primacy of face-to-face channels like trade shows, industry association events, and site visits underscore the vital importance of human capital when it comes to building profile for a destination.”

“65 percent of the DMO professionals who responded to the 2024 ITI estimate that incentive travel generates up to 50% of their business events revenue.”





COMMENTS FROM INDUSTRY LEADERS

We shared the initial results of Destination inSITES with a number of Destination Marketing Organisations (DMOs) and Destination Management Companies (DMCs), capturing their valuable comments on the pages that follow. Their expert opinions bring the research to life by connecting raw data with practical, actionable insights.

These industry leaders provide thoughtful perspectives that illuminate the everyday implications of our findings, making the research both relevant and immediately useful. By integrating these seasoned viewpoints, the study not only validates our data but also offers clear guidance that enhances decision-making in destination marketing and management. Their insights significantly enrich our strategic approach.

“

Pay attention to the data! There are clear shifts in attendee preferences that are revealed through research from multiple organizations including SITE Global.

We have seen exposure to authentic cultural experiences and free time to explore destinations on own align with incentive travel research.

DMOs and DMCs can add greater value by guiding customers on how to maximize exposure to these experiences with excursions or by incorporating them into on-site activities and events in the form of entertainment or F&B.

Staying tuned into these, and other preference trends will help you create experiences that are rewarding, motivating and memorable!



Fred Edson
Incentive Sales Director,
Discover Puerto Rico



“

Today’s planners should prioritise trusted destinations with proven safety, neutrality, and adaptability.

A strong partnership with the local CVB becomes even more valuable, serving as your insider to navigate cultures, connections and unlock hidden gems.

Singapore embodies this, offering an accessible, secure and neutral hub in Asia with an inspiring blend of innovation and culturally diverse experiences.”



Gregory Yap,
Vice President, Americas
Singapore Tourism Board



“

Integrating sustainability and Diversity, Equity, Inclusion, Accessibility, and Belonging (DEIAB) considerations into a DMC offerings is all about being creative and connected.

Recently our team in Vietnam partnered with a local social enterprise and re-purposed all the event backdrops into shopping bags and accessories, aligning with our client's sustainability goals and objectives and brand values of reuse.

These were given to attendees as gifting and through this circular initiative there was benefit to both the destination community and attendees absolutely loved them.”



Selina Sinclair,
CEO,
Realm

REALM

“

Tier 2 and Tier 3 locations offer many benefits when attracting incentive groups to their destination – unconventional venues such as historical buildings, rural estates, factories or natural outdoor venues; unusual experiences with local festivals and workshops and intimate guided experiences, and the ease in which they can create the most intimate of environments when being slightly removed from the hustle of more major cities. All of this offered at a competitive price point provides a very unique incentive offering.”



Aoife Delaney,
Managing Director,
DMC Network





“Mi Casa es su Casa”

Destinations can focus on providing unique, authentic, high-end experiences that immerse travellers in local culture and cater to individual preferences.

These experiences, which can create lifelong memories, do not necessarily require high costs.

Personalized services and the integration of sustainable and ethical practices can also enhance the appeal, leveraging local culture, natural assets, and community-based initiatives to offer rich, immersive experiences that attract visitors.”



**Benoit Sauvage, DMCP,
CMP Fellow, CITP,
CEO, Connect DMC**



“

Destination inSITEs clearly demonstrates that ‘new destinations not used before’ have emerged as the foremost criterion for selecting an incentive travel locale. At the Abu Dhabi Convention Bureau, we pride ourselves on presenting a destination that marries unparalleled five-star resorts and luxury hotels with a rich cultural tapestry, vibrant entertainment, and meticulously curated activities. This combination not only elevates the travel experience but also catalyzes transformation for qualifiers and corporations alike.

Furthermore, this trend speaks to a broader shift in the industry—a growing desire for fresh, innovative environments that stimulate creativity and foster stronger team dynamics. By embracing the untapped potential of new destinations, we are setting the stage for experiences that are both inspirational and strategically beneficial, ultimately contributing to sustainable growth and a dynamic corporate culture.”



Moammer Mohammed Al Marzooqi,
CEO, Section Head of Meetings,
Incentives & Weddings,
Abu Dhabi Convention Bureau

abu dhabi
Convention & Exhibition Bureau



Destination selection is at the heart of every successful incentive travel program. As someone who has spent a lifetime both welcoming and sending incentive travelers across the world, I see firsthand how destinations must continuously adapt to shifting priorities—safety, value, sustainability, and cultural uniqueness. The findings in Destination inSITEs reinforce the evolving landscape of incentive travel and the increasing demand for destinations to offer transformative experiences that go beyond traditional tourism.

By embracing these insights, destinations and their partners—DMCs, DMOs, hotels, and venues—can strategically position themselves to attract and retain incentive programs, ultimately ensuring the enduring value of travel as a business performance driver.”



Karim ElMinabawy,
President SITE & CEO,
EMECO, Cairo, Egypt



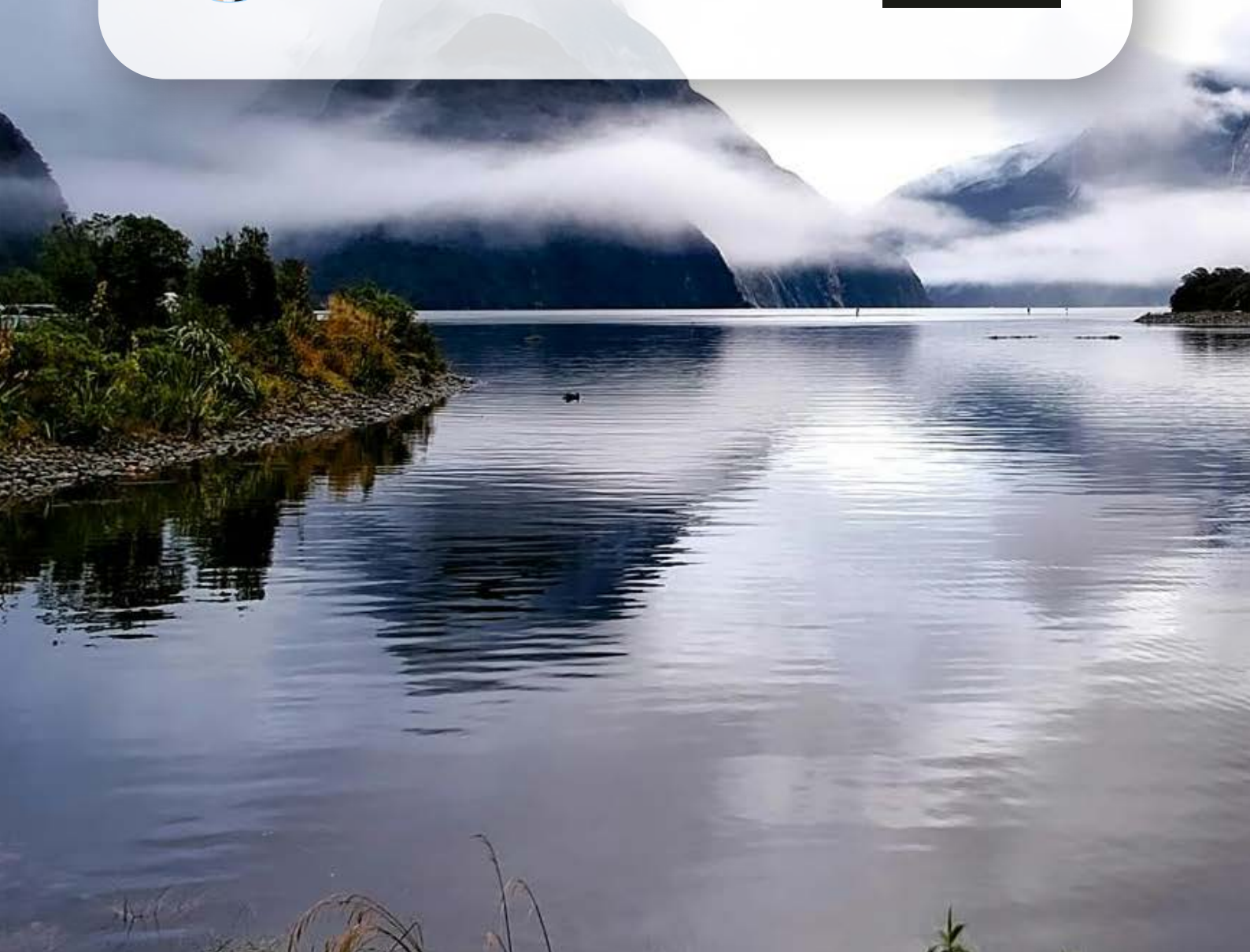
“

Leaning into your strengths as a destination gives the opportunity to provide clients with elements such as sustainability and DEIAB without incurring additional costs. New Zealand has a strong track record of sustainability and inclusion. These are not just ‘add ons’: caring for people and place is integral to how New Zealand operates. Experiences in nature offer opportunities for regenerative tourism. Manaakitanga (a Māori concept), our welcoming hospitality, is evident in the way we treat all our visitors. We’ve hosted conferences championing diversity, equity and inclusion including the 8th IWG World Conference on Women and Sport and will soon welcome world conferences on Indigenous Education and Indigenous Cancer. There is nowhere better to reward and inspire high performing employees than New Zealand and for most destinations we are only one flight away.”



Penelope Ryan,
Global Manager Business Events,
Tourism New Zealand

**100% PURE
NEW ZEALAND**



“

Destinations can enhance their appeal and maintain competitiveness by focusing on meaningful, community-driven experiences that are both cost-effective and transformational. Emphasizing authentic cultural storytelling and showcasing local traditions allows visitors to deeply connect with a destination's identity without relying on costly infrastructure. Indigenous medicinal walks are a perfect example—these experiences are not only low-cost but also profoundly inspiring. Guests learn about traditional healing practices, natural remedies, and the cultural significance of the land, leaving with a deeper appreciation of the community and its heritage. By embracing initiatives like these and collaborating with local storytellers, artisans, and cultural leaders, destinations can create memorable, enriching experiences that resonate deeply with visitors while managing rising costs. When people feel truly connected to a place, they carry it with them long after they leave.”



Jennifer Attersall,
Senior Director,
Client Engagement Business Events,
Destination Canada



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