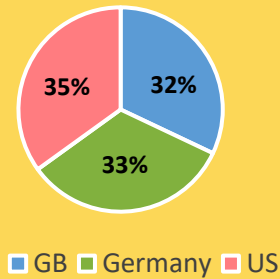


Understanding the sentiment of international Incentive Agencies is key to inform the business tourism industry’s recovery post pandemic.

103 interviews¹ were conducted by telephone (Oct - Nov 2021) with GB, US and German Agencies to:

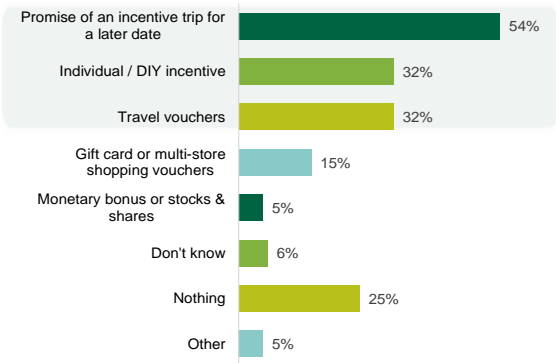
- 1. Understand where incentive agencies are at in terms of future planning and the legacy of incentive substitutes.
- 2. Identify impact and challenges of Covid on short- and medium-term destination decision-making.
- 3. Measure awareness of Ireland, consideration for future incentives and where the opportunity lies for Ireland.



Alternatives to Incentives (During Pandemic)

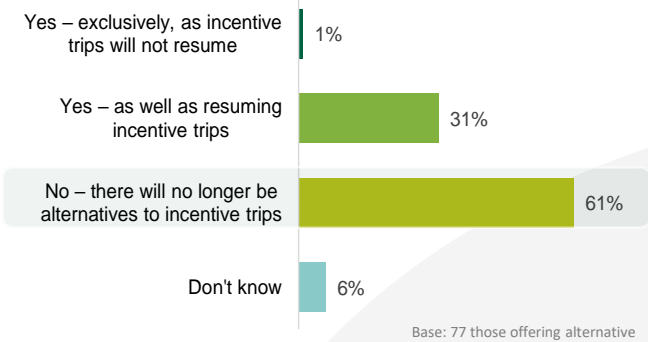
- The most common alternative for incentives has been to delay the trip.
- ‘DIY’ incentives and travel vouchers are also common – more so than non-travel related alternatives.
- US organisers are much more likely to offer something: especially promised trip (78%), travel vouchers (53%) or DIY incentive (47%).
- By comparison, many (39%) GB & German organisers have simply offered nothing.
- Nearly all (94%) who have been offering alternatives say that incentive trips will return when travel becomes less restricted.

Q: During the pandemic, what if anything was offered who would have otherwise gone on an incentive trip?



Outlook for Incentive Trips

Q: In the longer term, will alternatives to tradition incentive trips continue to be offered ?

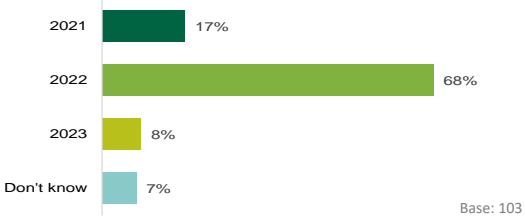


- In the longer term, incentive trips are expected to return, however nearly a third (31%) currently offering alternatives will continue to do so in conjunction with a trip option
- German organisers are the market most likely to offer alternatives in both the short and long term.
- Most GB agents interviewed who are currently offering alternatives will return exclusively to incentive trips.
- About six in ten US organisers currently offering alternatives will return exclusively to incentive trips.

When will the Next Incentive Trip Take Place?

- Most (85%) organisers expect the next incentive trip to take place within 12 months (2022) .
- But this is not necessarily international – some organisers are staying closer to home for the time being.
- And there is uncertainty over whether booked trips will take place (Covid cases were rising again, in mainland Europe, at time of interview).

Q: When do you expect you/your clients (in the main) to have the next incentive trip take place?



Market Nuance on Future Incentives

Most uncertain market to return to in person incentives due to soaring Covid cases

Most likely market to continue offering alternatives and 50% expect reduced frequency in incentive trips

In between Germany & US for confidence in returning to incentive trips





39% are looking for shorter travelling times & distances – Ireland is now more likely to be considered than before

Much more confident about returning to international incentive trips than European agents.

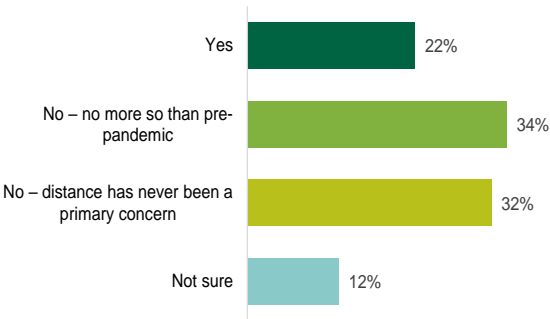
Covid is viewed more as a hassle rather than a health threat

¹ 103 Interviews: 33 GB / 34 Germany / 36 US

How Incentive Planning will Change (post-Covid)

- **Lead times** stay roughly the same and where there is change, they will become longer, not shorter.
 39% of GB organisers expect longer lead times, due to hesitancy to commit to trip.
- Two thirds expect no change in importance of **travelling times & distances** for incentive delegates.
 However, GB is also the market more likely to look for shorter times and distances.
- Overall, we may see a decline in **frequency** of incentive trips compared to pre-pandemic times.
 49% of GB & German organisers expect trips to be less frequent.
 Compared to 36% of US organisers.

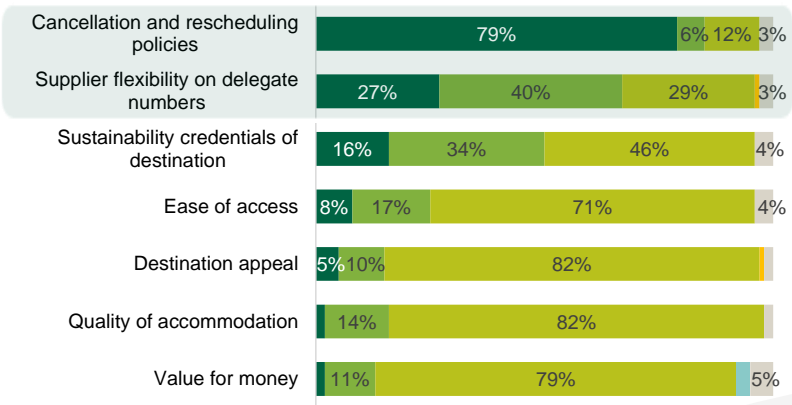
Q: Compared to pre-pandemic times, would you look for shorter travelling times and distances for delegates?




Change in Importance of Decision-Making Factors

Q: In post-pandemic destination planning, have each of the following decision making factors become more or less important?



- Much more important
- Slightly more important
- Equally important
- Slightly less important
- Don't know



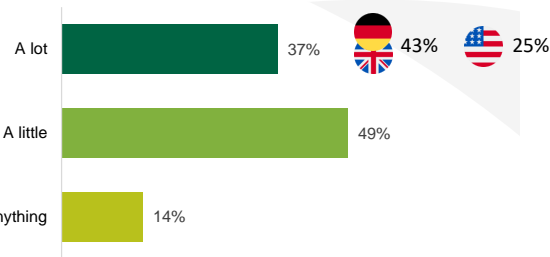
• So much is still uncertain about international travel that organisers won't risk planning an incentive trip without a favourable cancellation / rescheduling policy.

- This is vital for organisers in all markets.
- **Supplier flexibility on delegate numbers** has also become more important
 Especially for GB organisers (52% say this has become much more important)




Sales & Marketing Insights

-  Previously hosting event/trip (46%) is mentioned as a primary source of information about Ireland, especially by GB & German Agents (62%).
-  In the US, emails / e-newsletters come out top (41%).
- Emails & e-Newletters (34%), In-Market Meet in Ireland Representative (34%), Online searches (33%), previous visit to Ireland (29%) & Trade shows (22%) are also important.

Q: How Much do you know about Ireland as an Incentive trip destination?



Key Takeaways

- Incentive trips will return, but at what frequency and length/time of travel?
-  Incentive trips from GB and Germany may decline in frequency as some organisers continue to offer alternatives . Covid and climate change related questions are asked of trip necessity.
-  **GB market may offer very good opportunity for Ireland as closer proximity is sought**
-  US organisers are very confident about international incentive trips resuming (but European destinations may be slower to recover relatively – with the volatility in travel protocols seen as a deterrent)
- Even more so than for conference Incentive trip **suppliers must be flexible to win bookings.**