



CVENT 2021 TRAVEL
MANAGERS REPORT

US AND EUROPE
EDITION

2021

ANNUAL TRAVEL MANAGERS REPORT

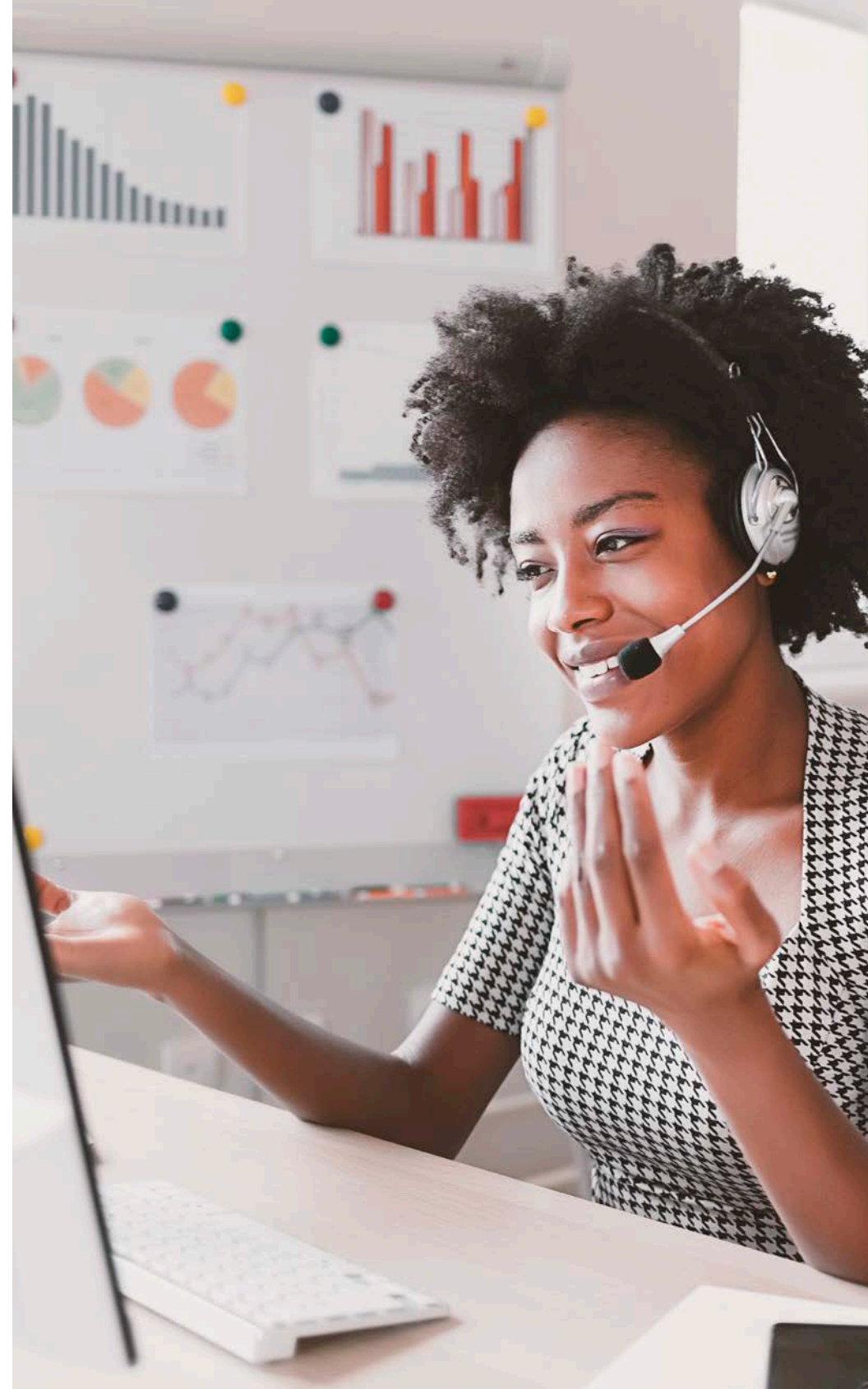
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Welcome to the US and Europe Edition of the 2021 Travel Managers Report, Cvent's Annual Corporate Travel Pulse-check.

This year, we understand that circumstances are challenging and uncertain. And while we can't predict when business travel will return in full, this report should help you get to know your buyers again so that when the good times come back, you're ready.

2020 may have halted business travel but our survey findings indicate that corporate travel managers are eager for a return to normality and are optimistic about their travel volume and budget per trip in 2021.

While these aspects of the findings are subject to change based on government guidelines and virus case statistics, one thing is clear: safety, cleanliness and social distancing are critical requirements for the resumption of business travel.



Top 3 Findings



A majority of travel managers expect their budget per trip in 2021 to increase compared to 2019.



Rigorous health and safety protocols in hotels are critical to help travellers feel safe.



Travel managers may be much more open to dual or dynamic rates in 2021 and will request them in their 2022 negotiations.



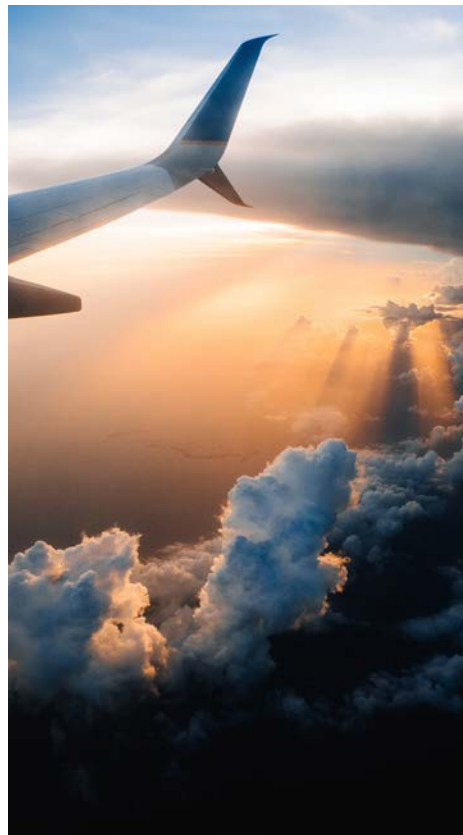
Methodology

Cvent commissioned an independent research company, Censuswide, to survey travel professionals from the United States and Europe. The survey was conducted from 4 February and 12 February.

This report is based on the survey responses of 715 corporate travel decision makers from international (defined as having office in 2+ markets) or large (250+ employees) companies in Germany, UK, France, Spain, Italy, Netherlands, and the United States.

Respondents work in broad range of industry sectors including:

- Architecture, Engineering & Building
- Arts & Culture
- Education
- Finance
- Healthcare
- HR
- IT & Telecoms
- Legal
- Manufacturing & Utilities
- Retail, Catering & Leisure
- Sales, Media & Marketing
- Travel & Transport



When will business travel return to 2019 levels?

The question on everyone's mind: when will the world return to how it was in 2019?

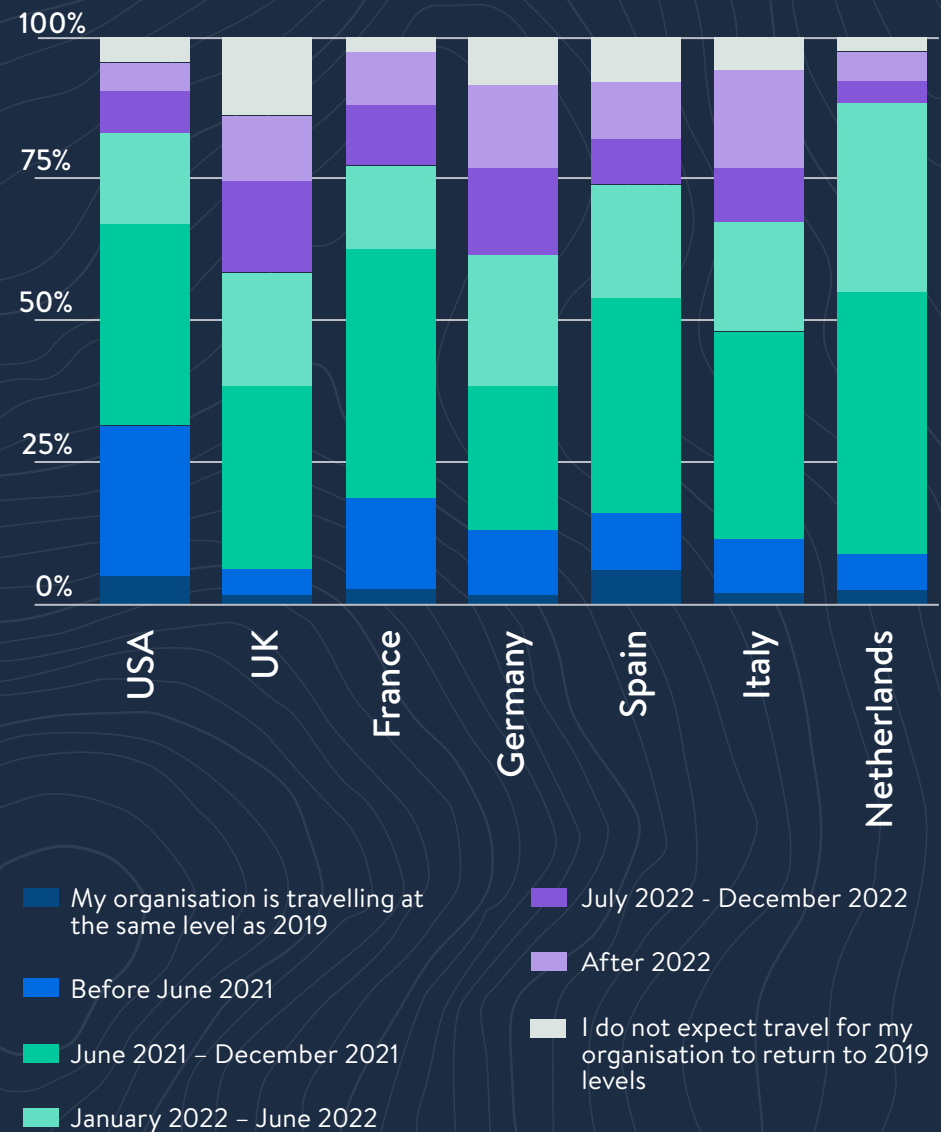
A majority of travel managers in France, Spain, the Netherlands and the USA expect travel to return to 2019 levels by yearend 2021. Optimism runs highest in the US, with 67% expecting a return to 2019 pace by yearend, and 27% expecting it before June 2021.

In the UK, only 38% predict a return to 2019 levels by year-end, with 48% anticipating a catch-up later and 14% saying it will never happen. It's worth noting, however, that Britain was in a nationwide lockdown at the time of surveying which may explain their outlook compared to other countries.

While there is a considerable uncertainty around when travel will return, it's clear with the introductions of vaccines and lockdowns, that progress will be gradual but likely positive."

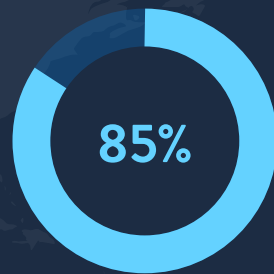
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When will business travel return to 2019 levels?

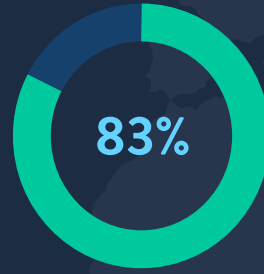


What regions will you see an increase in travel volume in?

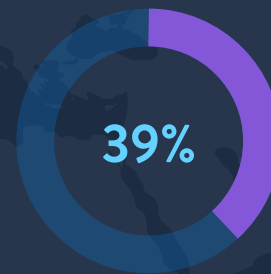
Respondents from the **USA** said they are likely to increase their travel volume to:



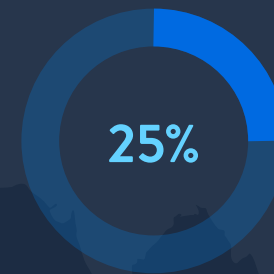
Americas



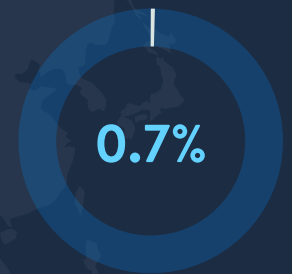
Europe



Middle East/Africa

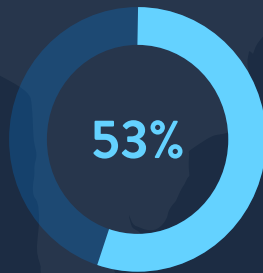


APAC

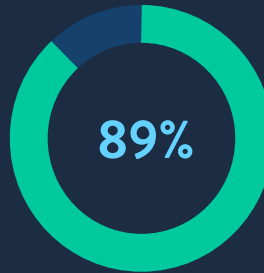


Other

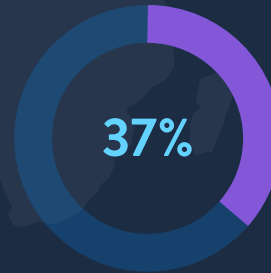
Respondents from **Europe** said they are likely to increase their travel volume to:



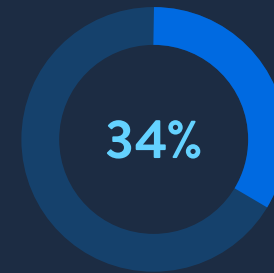
Americas



Europe



Middle East/Africa



APAC



Other

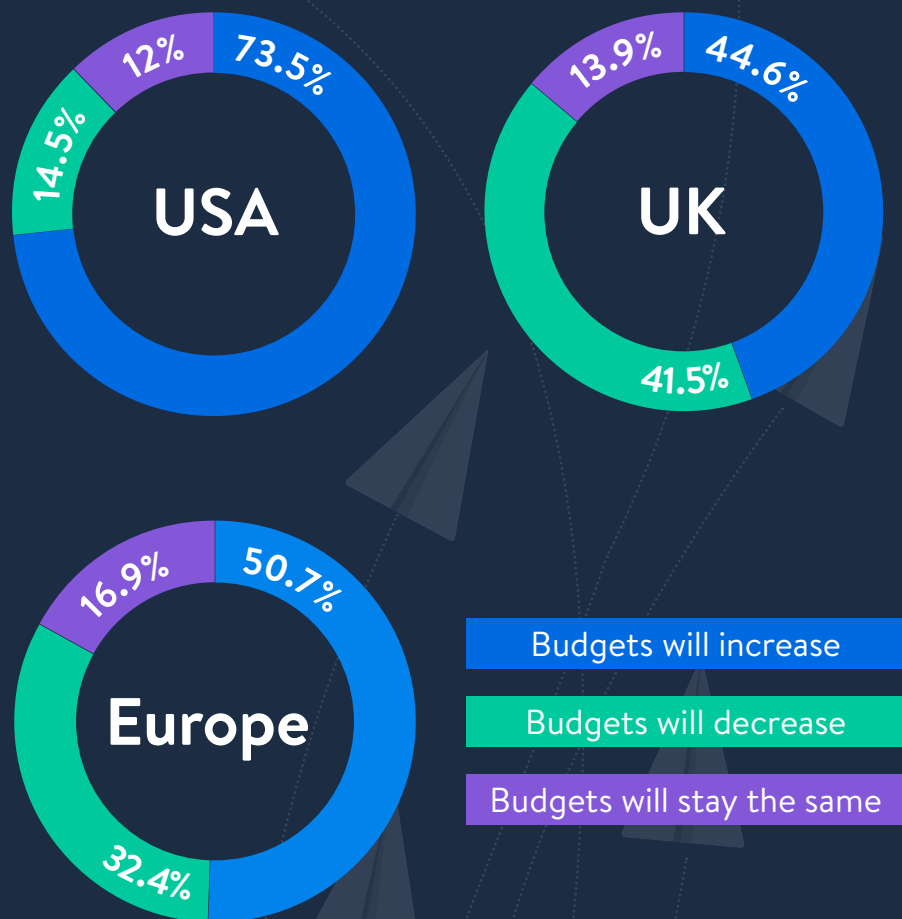
Regions

As markets begin to open in different stages, it's possible that travel managers expect business trips within their company to occur close to home to avoid complications and mitigate risk.

For example, when asked to select the regions they will see an increase in travel volume in, 89% of Europeans stated that they expect an increase in travel volume in Europe.

No other region came close. Interestingly however, 85% of US travel managers signalled an increase in the Americas and 83% in Europe, suggesting that Europe remains an important destination for US business travel.

How do you expect your organisations 2021 business travel budget per trip to compare to 2019?



How will 2021 budget per trip compare to 2019?

Despite the unprofitable year of 2020 for the travel industry, we are seeing a sliver of optimism when it comes to travel manager budgets in 2021. Nearly 3 in 5 (57%) respondents expect their organisations' 2021 business travel budget per trip to increase compared to 2019 compared to the 27% who expect it to decrease.

Interestingly, almost three quarters (74%) of respondents in the USA expect their organisations' 2021 budget per trip to increase compared to 2019, compared to over 2 in 5 (45%) respondents in the UK.

Safety is paramount across the board

It is evident that to win business from travel managers in 2021, hotels must go above and beyond when it comes to hygiene and safety - and communicate this well. Ensure that your staff know their COVID-19 protocols and practices back-to-front. Critically, get savvy when it comes to the status of your clients' countries; what are the official guidelines? How much of the population is vaccinated? What are the virus rates like?

Top programme considerations

For travel managers, the safety of their travellers is evidently vital. Travel managers will likely be more critical of the hotels they are sending travellers to as a result.

“

“We’ll need a high quality digital infrastructure.”

- UK Respondent

What are your top programme considerations as you plan business travel in 2021 and 2022, if any?

Ensuring and understanding enhanced COVID protocols (and extra fees)

66%

Requiring travellers to be vaccinated

55%

Duty of care and ensuring compliance with preferred vendors

44%

Sourcing properties in closer proximity to sites/offices being visited

34%

Reducing the number of stays

30%

Extending the length of stays

23%

What are the top requirements for your organisation to begin travelling for business, if anything?

Official guidelines (e.g., WHO or government) for hotels and airlines to follow

56%

Low virus case rates reported in the markets my organisation is travelling to

53%

Comprehensive vaccination in the markets my organisation is travelling to

51%

Positive employee feedback about their readiness to travel

47%

Third party risk firm analysis conducted by my organisation

33%

There are no top requirements for my organisation to begin travelling for business

3%

Other

0.3%

Top requirements for organisations to resume business travel

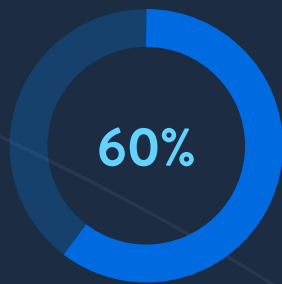
While these are elements hotels cannot influence, it's important to understand what matters the most to travel managers when it comes to resuming business travel. Keeping a close eye on official guidelines, virus case rates and vaccination rollouts in different markets, for example, can help you target or reach out to potential clients at the right time.

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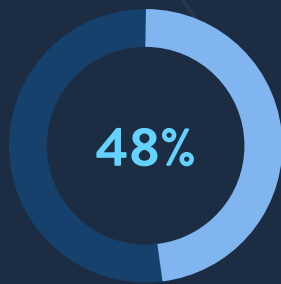
“We’ll need widely available, effective treatments for COVID-19 both at home and in the destination we send travellers when the pandemic ends.”

- US Respondent

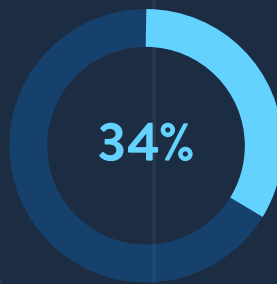
In 2021, what is your primary need from hotels in order to source a hotel for your travel programme, if anything?



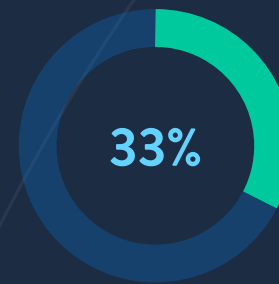
High quality health and safety protocols



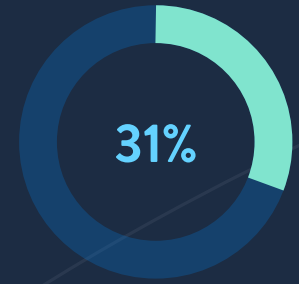
COVID-19 tests at hotel



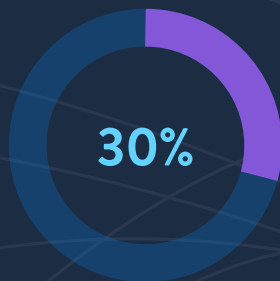
Negotiated amenities



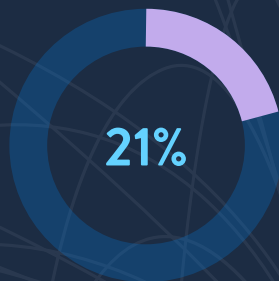
Meeting space within the hotel



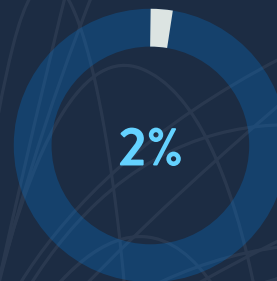
Larger rooms better equipped for working



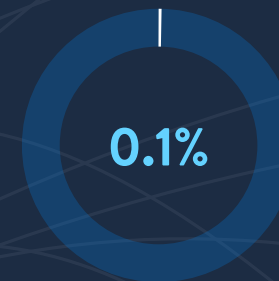
More flexible rate negotiations



More outdoor space



No primary need



Other

What travel managers are looking for from hotels

Travel manager needs will be reflected in RFPs and through negotiations. They want to confidently know that traveler wellbeing is of the utmost importance. High quality health

and safety protocols, availability to testing and negotiated amenities were rated as the top-3 primary needs of travel managers.

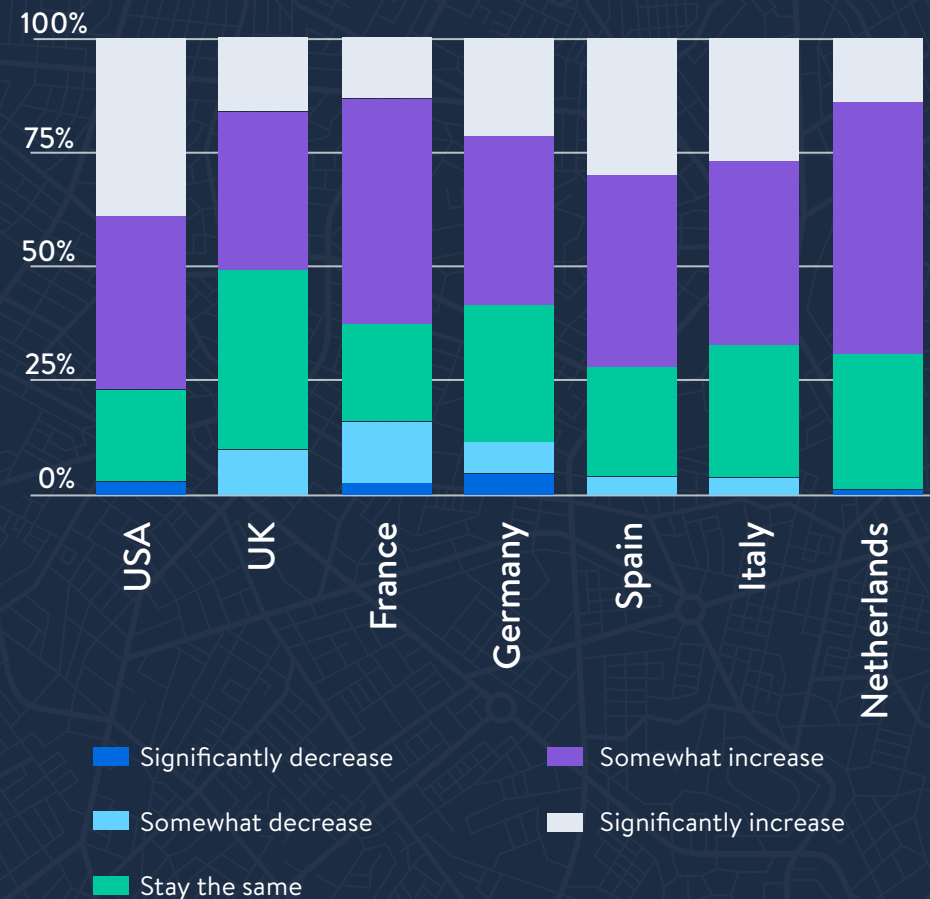
How do travel managers feel about dual or dynamic rates?

That is not to say that rate flexibility does not matter. It does, but less in the up-front negotiation than in travel manager expectations of dynamic rates in this uncertain environment.

In the US, demand for dual or dynamic rates seems to be the highest, with 77% of travel managers predicting that their openness will either somewhat or significantly increase. In Europe, 61% say that their openness will somewhat or significantly increase.

Technology is allowing travel managers to request dual rate strategies and hotels to accommodate. We expect this trend to be a significant strategy in future hotel programs.

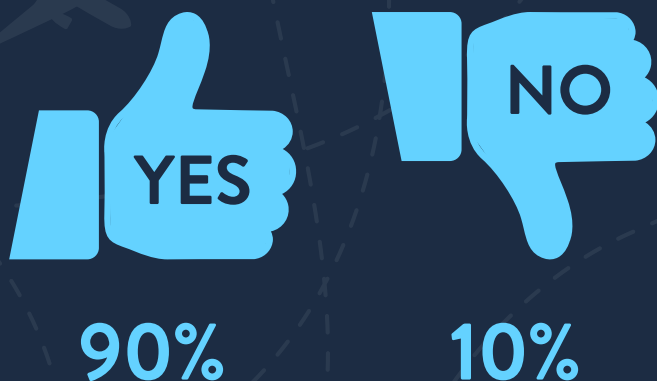
When will business travel return to 2019 levels?



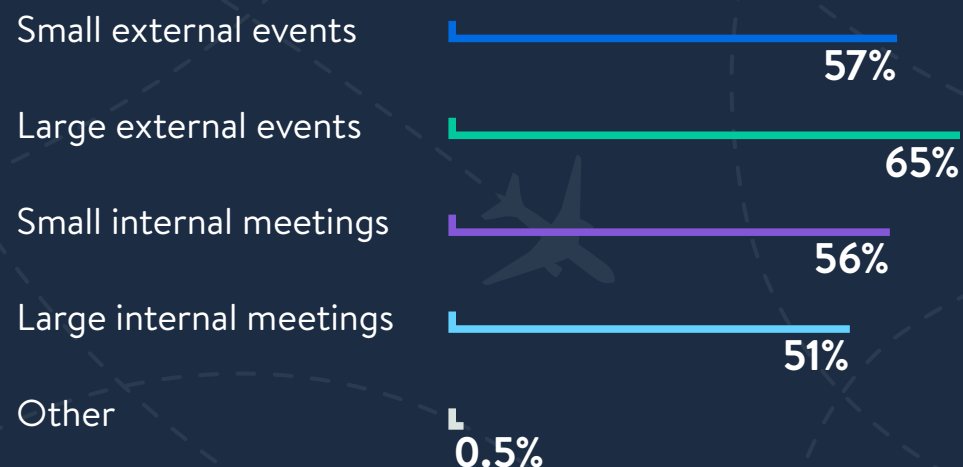
Will you request dual or dynamic rates during the negotiations for 2022?



Are you responsible for sourcing hotels for your organisations' meetings and events in addition to sourcing for employee travel?



What kind of meetings and events do you plan at your organisation?



Travel managers also source for meetings and events

Would you be surprised to hear that 90% of our respondents said that in addition to their travel manager responsibilities, they also source venues for meetings and events?

It's clear that travel managers oversee lots of event types. With pandemic related budget cuts and redundancies, travel managers might now be taking on extra responsibility, which includes planning meetings and events.



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Cvent is the global meeting, event, travel, and hospitality technology leader.

Cvent provides easy-to-use, integrated technology solutions to maximize the impact of meetings and events of all sizes. We help organizations plan and market events, execute onsite, engage audiences, and measure and analyze results.

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