



TRAVEL BUYER SURVEY: WELLBEING

BY BCD TRAVEL RESEARCH & INNOVATION

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ABOUT THE SURVEY

Goal: With this survey we aimed to explore the importance of traveler wellbeing, look at the factors contributing to physical and mental health of traveling employees, and study corporate initiatives to improve the traveler experience.

Methodology: The results are based on an online survey of 118 travel buyers conducted from March 4 to 23, 2022.

Respondent profile:



Travel program type: 71% Global, 17% Regional, 12% Local.



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Geography: 42% NORAM, 32% EMEA, 15% LATAM, 11% APAC.

Top-three industries: 28% Life Sciences, 10% Computer & Technology, 8% Manufacturing.



Size: 64% work for companies with more than 10,000 employees.

- Introduction
- <u>Wellbeing policies</u>
- Suppliers and tools
- Workplace policies
- KPIs and outlook



Introduction to traveler wellbeing

Travel program priorities

Importance of employee wellbeing

Wellbeing support for business travelers

Traveler wellbeing budget for 2022

Wellbeing goals

<u>Wellbeing stakeholders</u>

Wellbeing agenda of travel managers



Travel program priorities

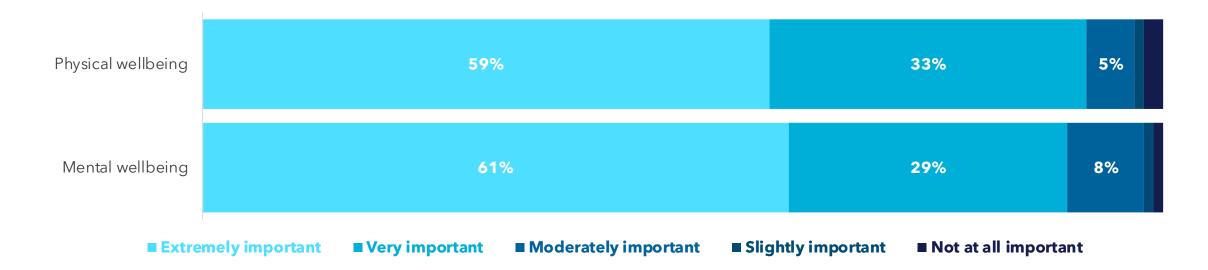
In comparison with 2021, duty of care and traveler satisfaction and wellbeing remain top travel program priorities. The importance of cost control is rising.

Duty of care	66%		26%	8%	
Traveler satisfaction and wellbeing	50%	6 42		5%	
Policy compliance	47%	43%		9 %	
Savings and cost control	41%	50%		5%	
Value of travel	35%	50%		13%	
Environmentally sustainable travel	33%	41%	16%	5%	
Data analytics and business intelligence	32%	44%		%	
Payment and expense management	31%	47%	17	17%	
Traveler digital experience	27%	47%	21%	6	
Supplier management	21%	56%	2	1%	
Extemely important	Moderately important	Slightly important	■ Not at all im	portant	

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Importance of employee wellbeing

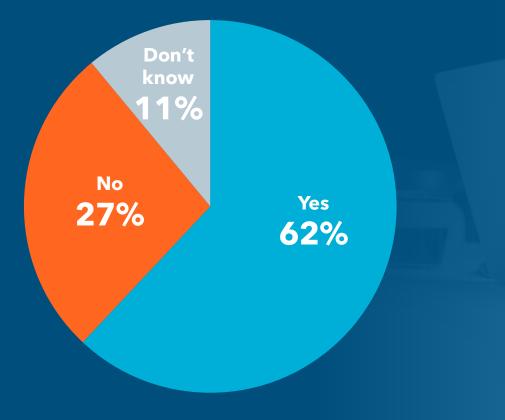
9 in 10 travel buyers consider employee wellbeing support to be extremely or very important.





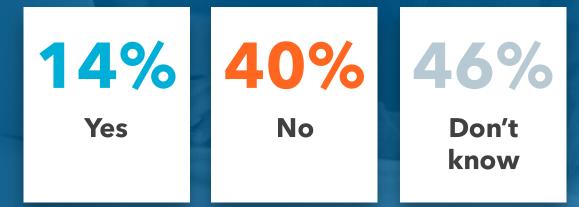
Wellbeing support for business travelers

While the vast majority of travel buyers recognize the importance of wellbeing, only 62% have support measures for travelers in place.



Traveler wellbeing **budget** for 2022

And only 14% plan to increase their budgets for traveler wellbeing support.





Travel buyers' wellbeing goals

Increasing traveler awareness is the primary goal of travel buyers, followed by measuring traveler wellbeing and getting support of the company stakeholders.

Increase traveler awareness of wellbeing Measure traveler wellbeing and identify the areas for improvement Increase awareness among company stakeholders and get their support Align travel policies to employee wellbeing priorities Introduce and/or expand traveler wellbeing policies Introduce wellbeing policies for specific traveler profiles Source new travel suppliers with wellbeing services and amenities None

Don't know

Other **3%**

ACHIEVE

60%

40%

37%

36%

33%

19%

17%

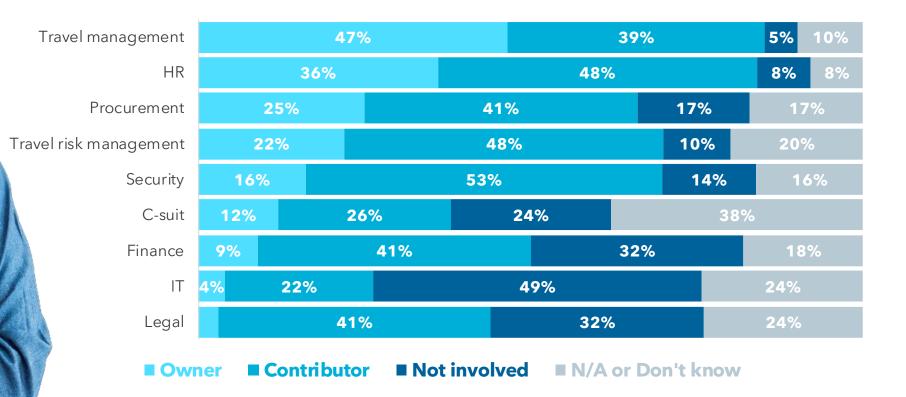
9%

6%



Traveler wellbeing stakeholders

Travel Management and Human Resources play the key role in traveler wellbeing either owning the issue or being involved.





Wellbeing agenda of travel managers

Among their wellbeing related tasks, travel buyers mention communication with travelers and company stakeholders most frequently.

Communicating with travelers across all channels on wellbeing topics	7%	16%	38	3%	17%	15%	8%
Communicating with company stakeholders on wellbeing topics	5%	12%	39%		21%	13%	9%
Updating travel policy with new wellbeing items		12%	39%		26%	15%	6%
Looking for new suppliers to improve traveler wellbeing		13%	% 31%		30%	15%	9%
Evaluating current suppliers on wellness amenities		8%	39%		29%	13%	8%
Measuring and reporting on traveler wellbeing KPIs	4%	7%	28%	20%	26%	1.	5%

■ Very often ■ Often ■ Sometimes ■ Rarely ■ Never ■ N/A or Don't know



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Wellbeing policies

Travel policies for wellbeing

Wellbeing support

Work-life balance support



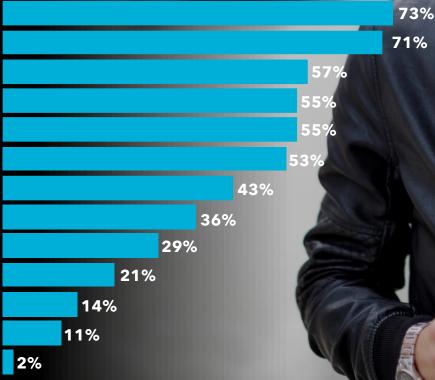


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Travel policies for wellbeing

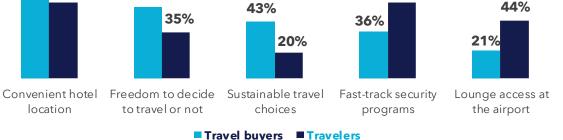
Convenient hotel location and direct flights are the top two most popular travel policies contributing to traveler wellbeing.

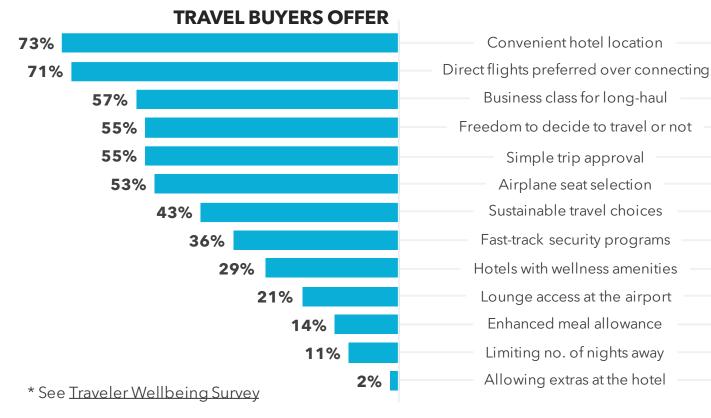
Convenient hotel location Direct flights preferred over connecting Business class for long-haul Freedom to decide to travel or not Simple trip approval Airplane seat selection Sustainable travel choices Fast-track security programs Hotels with wellness amenities Lounge access at the airport Enhanced meal allowance Limiting number of nights away Allowing extras at the hotel



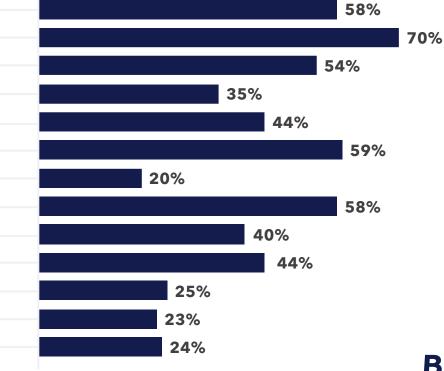
Travel policies for wellbeing: Travel buyers vs. travelers

Travel buyers offer various policies that improve traveler wellbeing but these options don't always coincide with what travelers are looking for. Top-five travel policies with the supply-demand gap73%58%58%55%58%



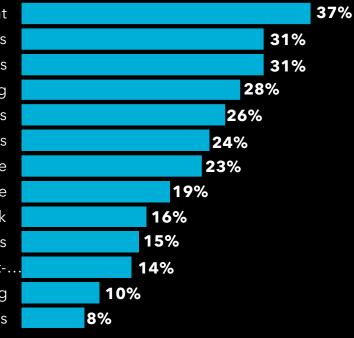


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Wellbeing support for business travelers

When it comes to dedicated wellbeing support, travel buyers tend to offer mental wellbeing options, such as training in stress management or mental counseling.



Training in stress management Mental health counseling for travelers Mental health support for vulnerable employees Subscription to mobile apps for wellbeing Medical checks for traveling employees Mental health support for specific traveler profiles None

Nutrition, sleep and recovery advice Expat coaching to alleviate culture shock Wellbeing activities incorporated into meetings Tracking traveler health through Internet-... Gym membership when traveling Recommendations of restaurants with healthy menus

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Wellbeing support: Travel buyers vs. travelers

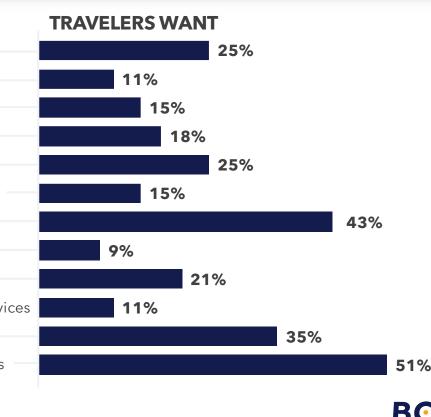
Travelers, on the contrary, are more interested in physical wellbeing support. They would like to receive recommendations of healthy food options,

Top-five wellbeing support measures with supply-demand gap





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* See Traveler Wellbeing Survey

37%

31%

31%

28%

26%

24%

19%

16%

15%

14%

Work-life balance support for business travelers

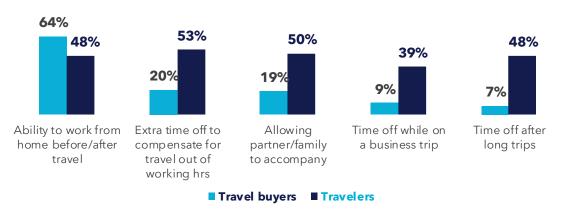
More than a half of travel managers have various work-life balance support measures in place, from allowing employees to work from any location to taking bleisure trips.



Work-life balance support: Travel buyers vs. travelers

Additionally, travelers would like to receive time off as a compensation for travel out of working hours, to have a possibility to take partners on business trips and to have time off after long trips.

Top-five WLB support measures with supply-demand gap





TRAVEL BUYERS OFFER

* See <u>Traveler Wellbeing Survey</u>

Suppliers and tools

Wellbeing-oriented travel suppliers

<u>Wellbeing solutions</u>

Mobile apps for wellbeing

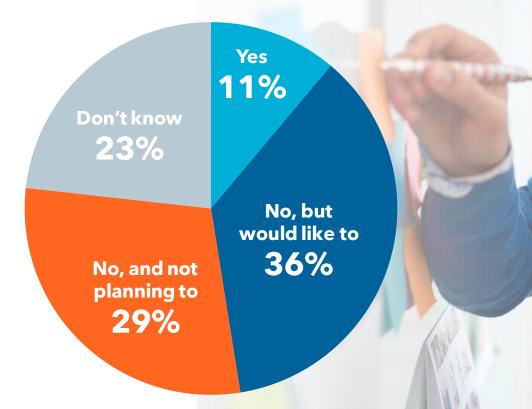


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Partnering with wellbeingoriented travel suppliers

Currently 1 in 10 travel buyers partner with wellbeingoriented travel suppliers, while a third would like to do so in the future.





Wellbeing solutions and apps

Do you offer mobile apps aimed at improving traveler wellbeing?



What wellbeing solutions do you provide to your travelers?

Mental health support 55% 16% 18% 11% Physical exercise 35% 24% 30% 11% Nutrition advice 26% 31% 28% 15% Guided meditation 26% 24% 19% 32% Healthy sleep 18% 29% 19% 35% How to combat jetlag 14% 38% 35% 13%

Currently offering

Not offering but would like to

Not offering and not planning to

Don't know



Workplace policies

Current workplace policy

Digital nomads

Travel managers' role



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Current workplace policy

9 in 10 travel buyers report a mix of remote and office work as a current workplace policy offered by their employers. 4%

Remote work

Work in the office **5%**

Mix of both 91%

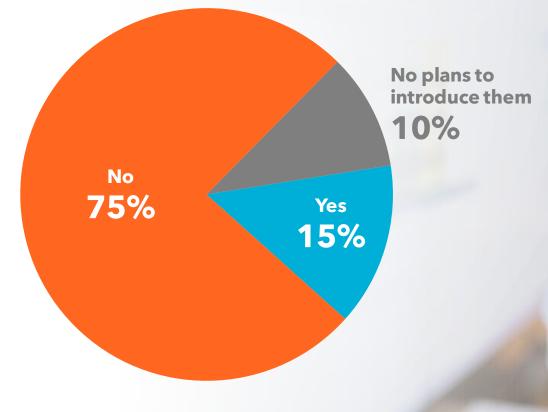


Is your company planning to introduce / extend digital nomad policy? Employees as digital nomads Don't know Yes No 10% 31% 58% Does your employer allow its employees to work from any place as digital nomads? 47% 26% 15% 8% 5% Yes without restrictions Yes but restrictions apply No Don't know Other

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Travel managers' involvement in creating and updating policies for digital nomads



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KPIs and Outlook

Traveler wellbeing KPIs

Information about traveler wellbeing

TMC support

<u>Challenges to introducing traveler wellbeing policies</u>

Traveler wellbeing trends

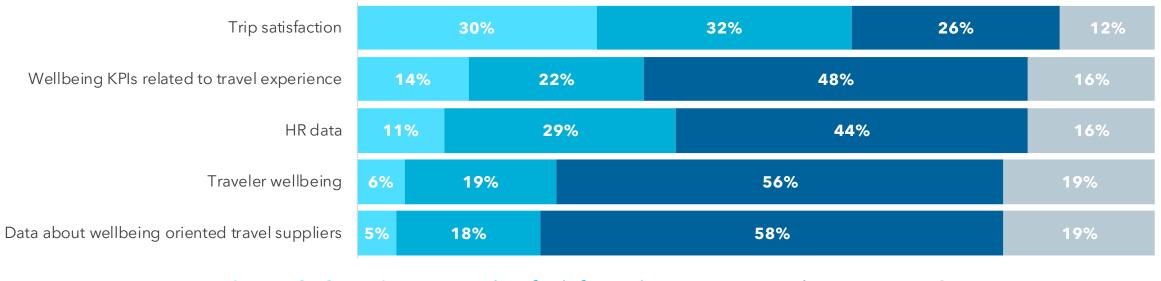
Traveler wellbeing support outlook



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Traveler wellbeing KPIs

Traveler satisfaction is the KPI tracked the most. Travel buyers review wellbeing indicators, data about wellbeing-oriented suppliers, HR data and travel experience KPIs related to wellbeing less often.

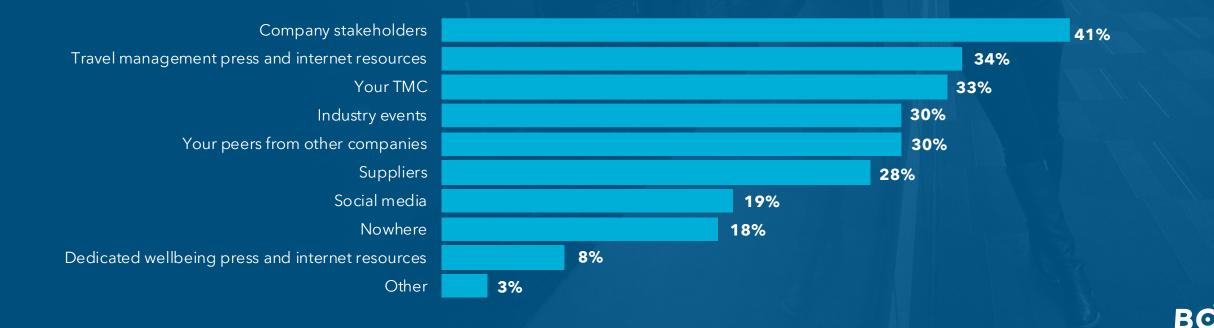


■ Review and take action ■ Review for information ■ Don't review ■ Don't know



Information about wellbeing

Company stakeholders, the travel press and TMCs are the most frequently used sources of wellbeing information for travel buyers.



TMC support

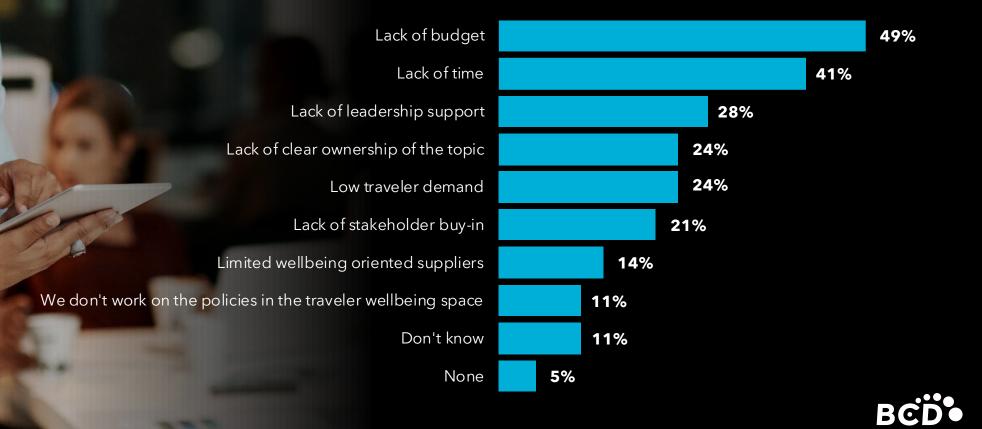
From their TMCs, travel buyers would like to receive data and reporting, as well as research and pandemic-related wellbeing support.

Data and reporting on traveler wellbeing Research and reports Pandemic-related traveler wellbeing support Wellbeing support for specific traveler profiles Assistance with traveler formal and informal feedback Drafting and/or implementing traveler wellbeing support program Access to wellbeing oriented travel suppliers Access to third parties providing services in wellbeing space Expat wellbeing support Don't know



Challenges to introducing traveler wellbeing policies

Lack of budget and time are the two major roadblocks to introducing and expanding the range of traveler wellbeing policies.



Traveler wellbeing trends

In the next 2 to 5 years, the importance of employee wellbeing support to attracting talent will be rising. Also, travel buyers expect new standards in the wellbeing space.

Moderately relevant

56%			25%	5%	13%
47%		37	%	5% 11%	
45%		33%		7%	15%
41%		34%	10	0%	15%
39%		45%		4%	12%
29%		51%		5% 15%	
28%		46%	109	%	17%
22%	39%		21%		17%
16%	36%	25%		23%	

Rising importance of employee wellbeing support to attract and retain talent New standards and regulations of Duty of care related to wellbeing Employee wellbeing viewed as an investment rather than a cost New wellbeing KPIs and improved reporting New traveler needs and expectations of wellbeing support Increasing interest of internal stakeholders to wellbeing New categories of suppliers and tools in the wellbeing space Rewarding travelers for taking care of their wellbeing Traveler wellbeing as a new spend category

Highly relevant

■ Not relevant ■ Do



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Wellbeing support outlook

Three quarters of travel buyers expect the importance of traveler wellbeing support to go up in the next 2-3 years.

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