

TRAVEL BUYER SURVEY: WELLBEING

BY BCD TRAVEL RESEARCH & INNOVATION

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.



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.

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Introduction to traveler wellbeing

[Travel program priorities](#)

[Importance of employee wellbeing](#)

[Wellbeing support for business travelers](#)

[Traveler wellbeing budget for 2022](#)

[Wellbeing goals](#)

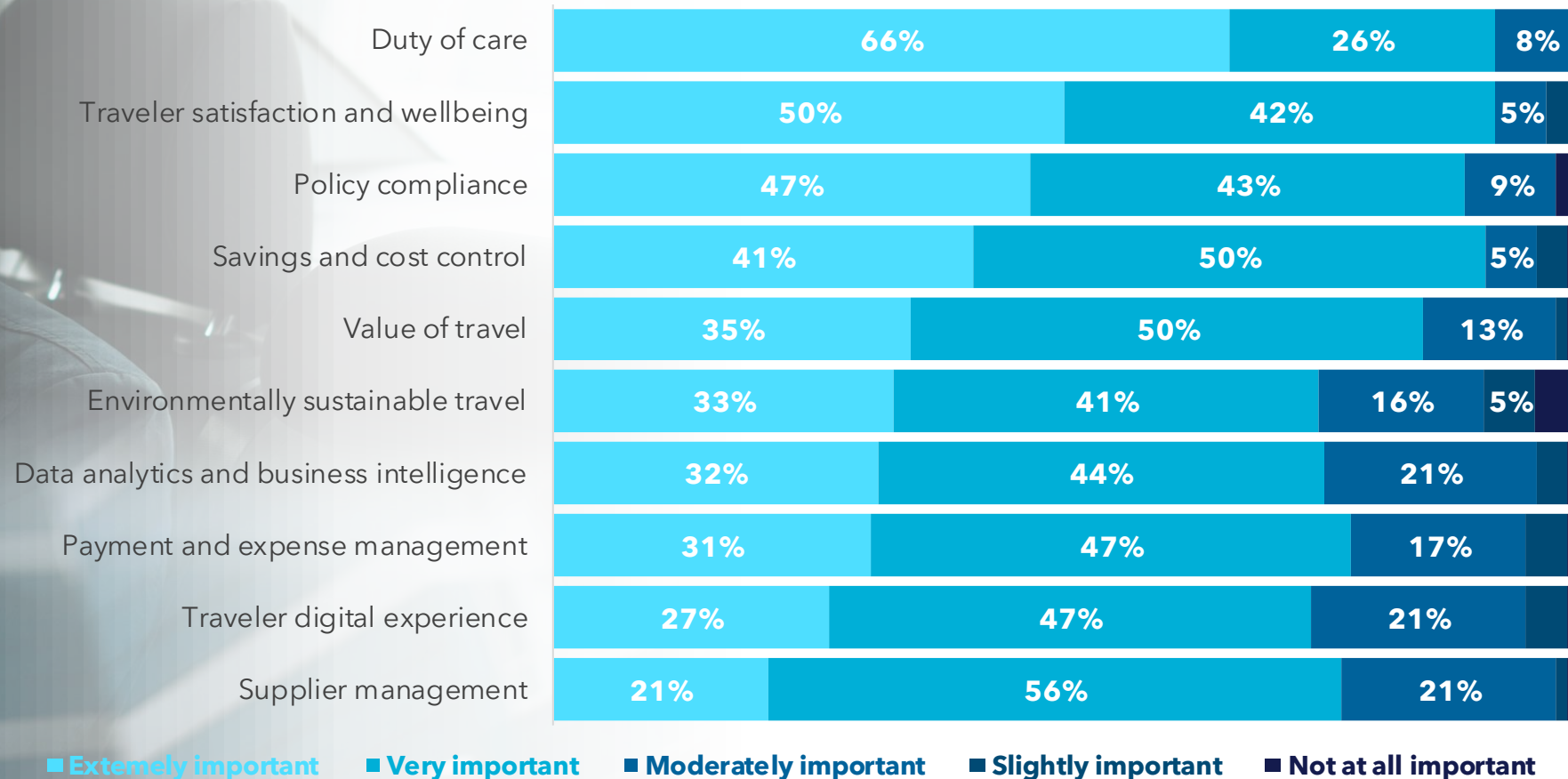
[Wellbeing stakeholders](#)

[Wellbeing agenda of travel managers](#)



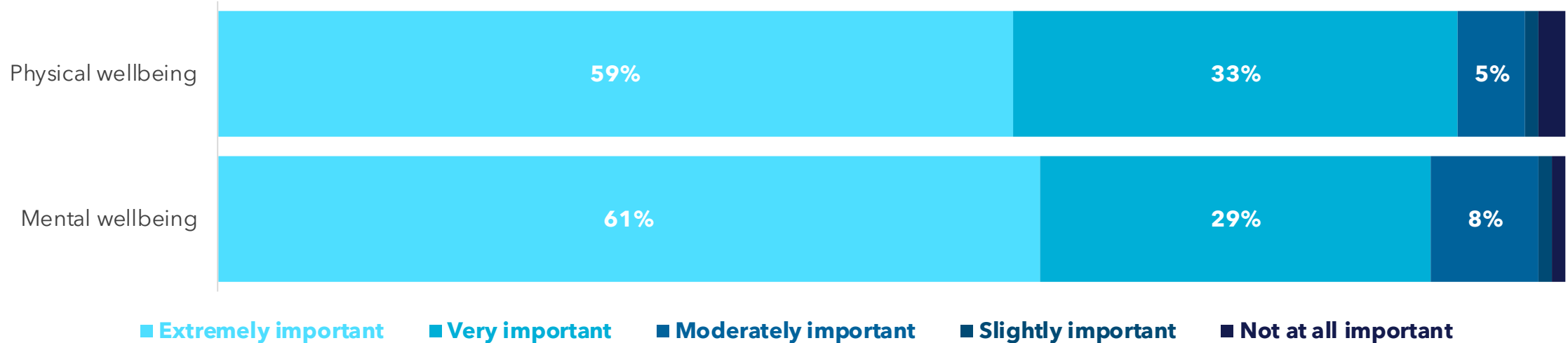
Travel program priorities

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



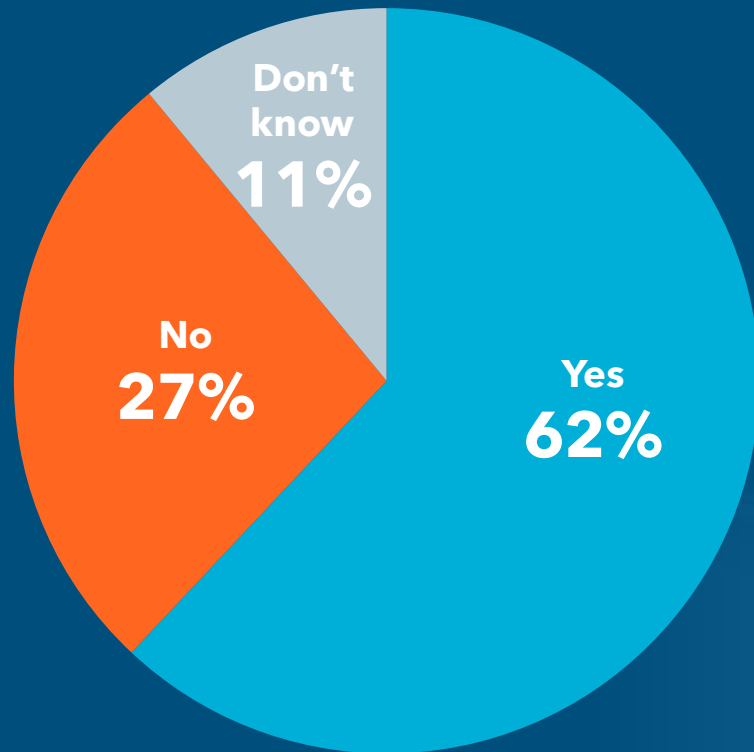
Importance of **employee wellbeing**

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.

14%

Yes

40%

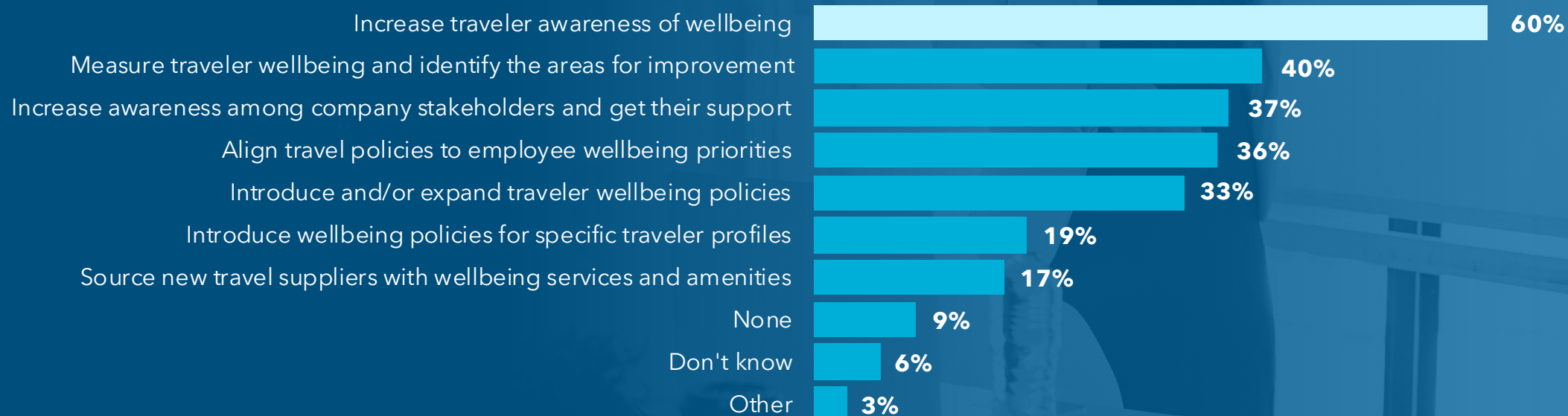
No

46%

Don't know

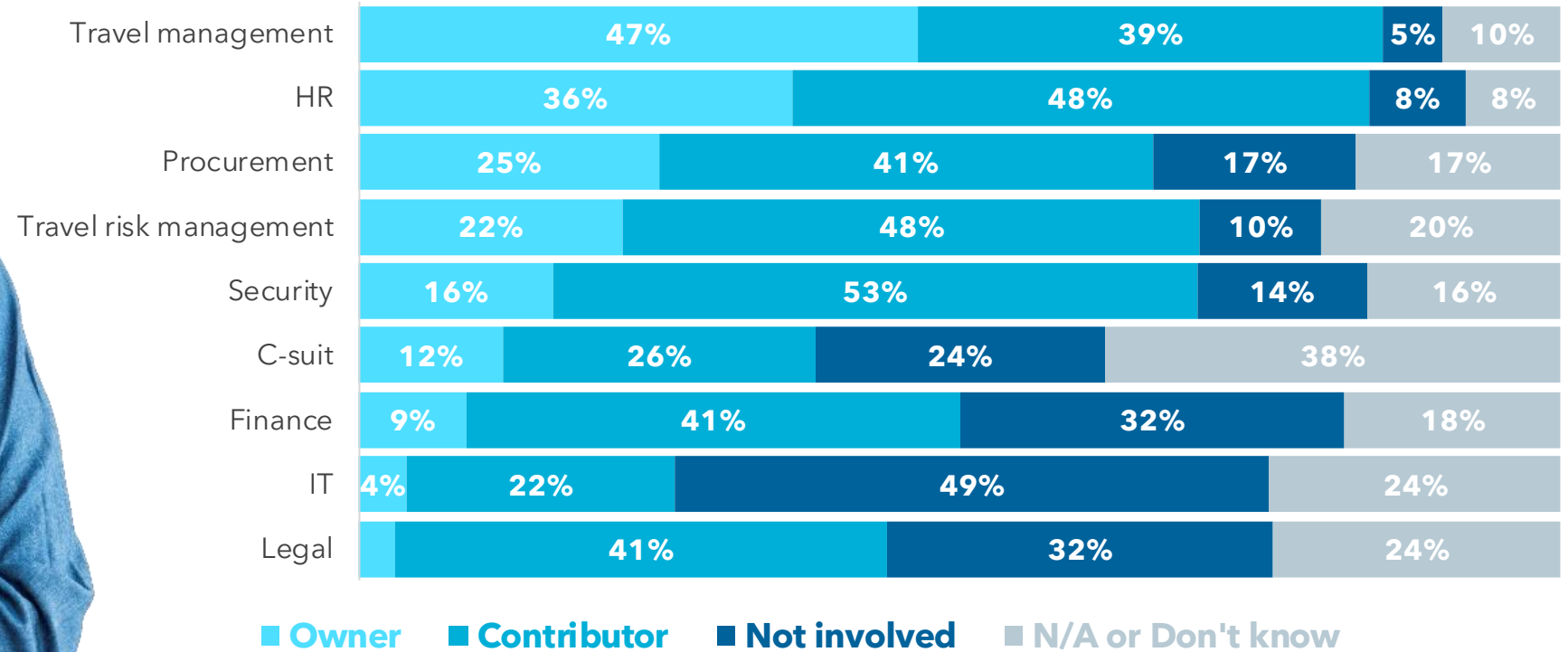
Travel buyers' wellbeing goals

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



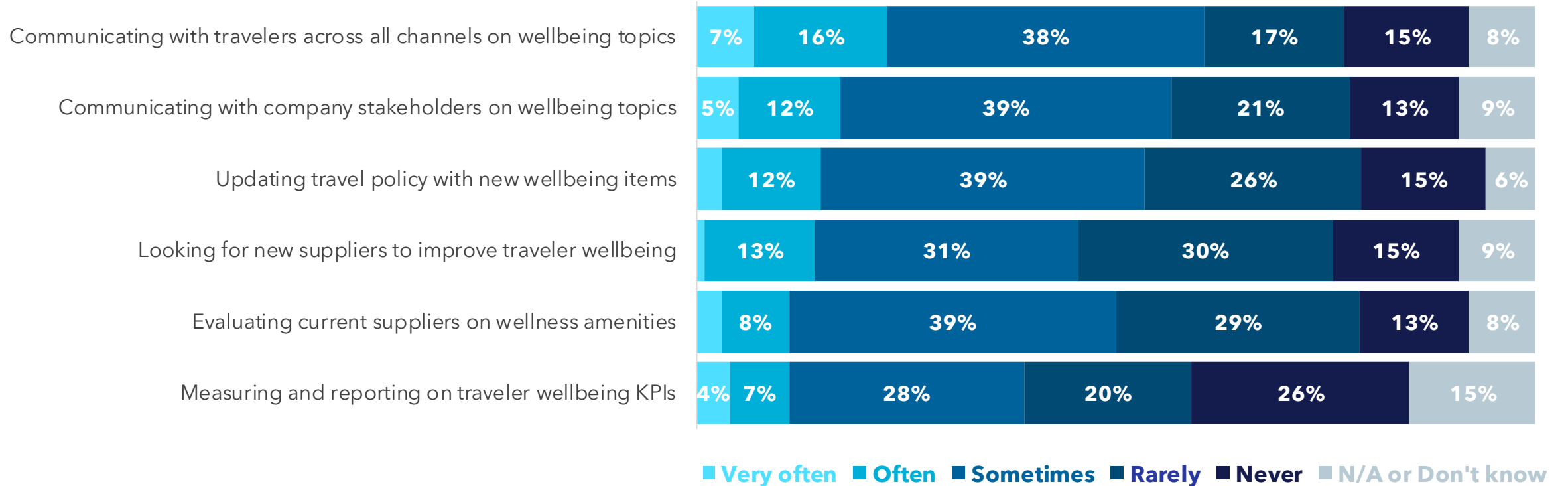
Traveler wellbeing stakeholders

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.



Wellbeing **policies**

[Travel policies for wellbeing](#)

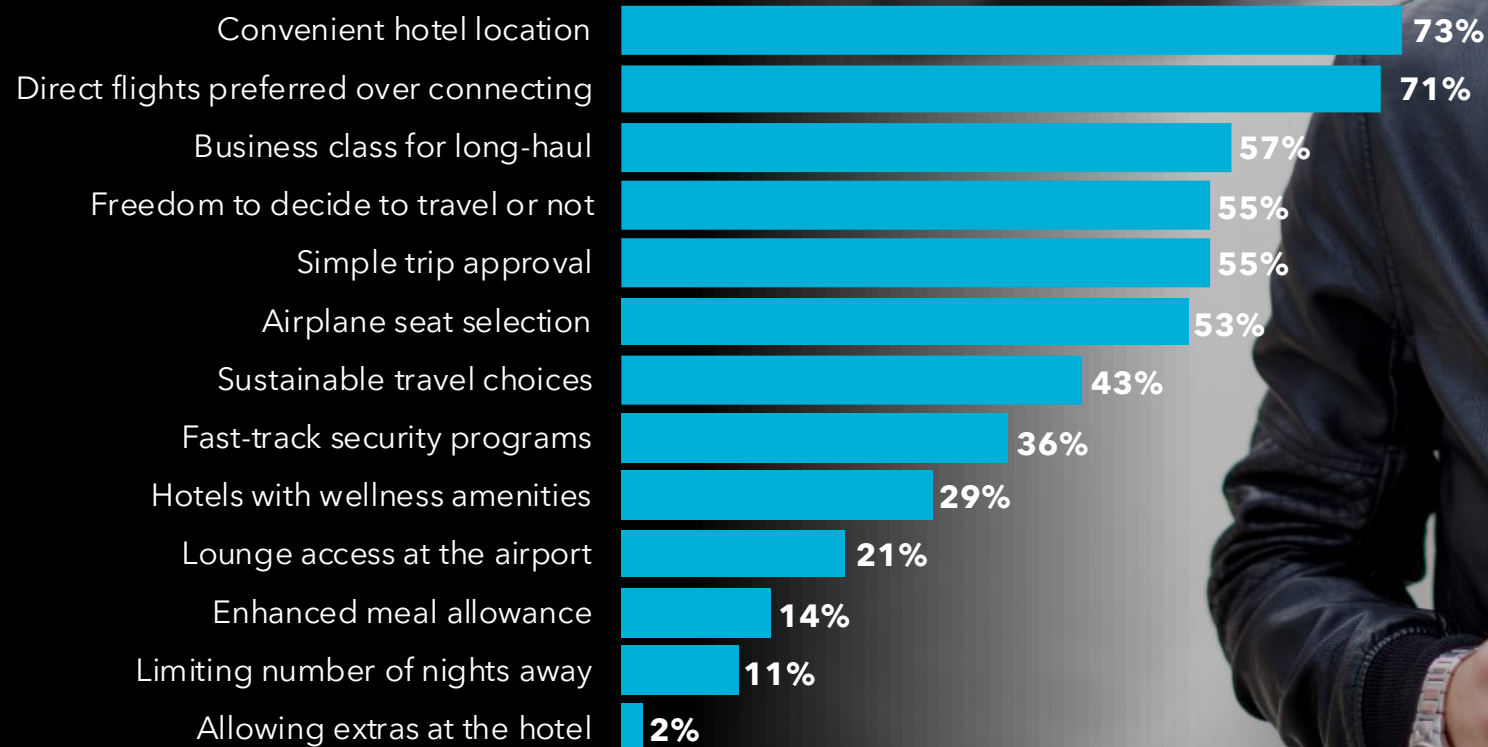
[Wellbeing support](#)

[Work-life balance support](#)



Travel policies for wellbeing

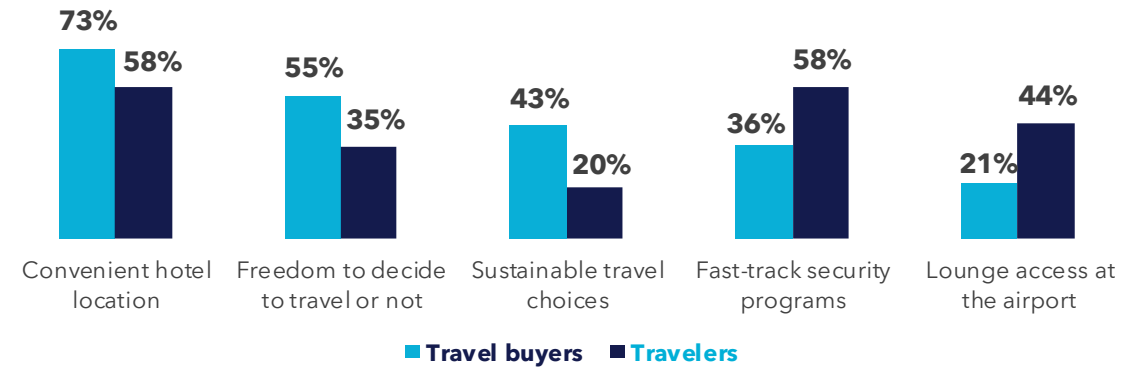
Convenient hotel location and direct flights are the top two most popular travel policies contributing to traveler wellbeing.



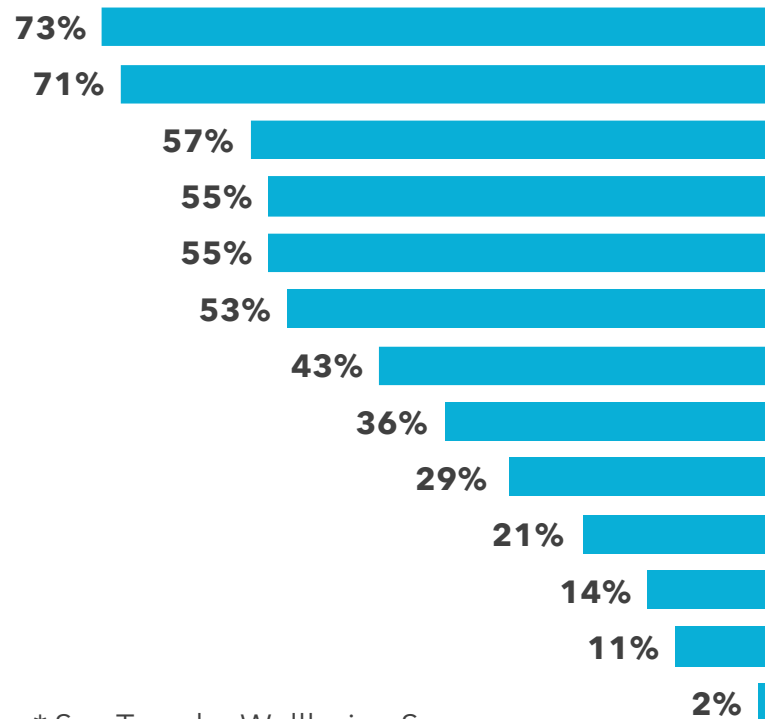
Travel policies for wellbeing: Travel buyers vs. travelers

Travel buyers offer various policies that improve traveler wellbeing but these options don't always coincide with what travelers are looking for.

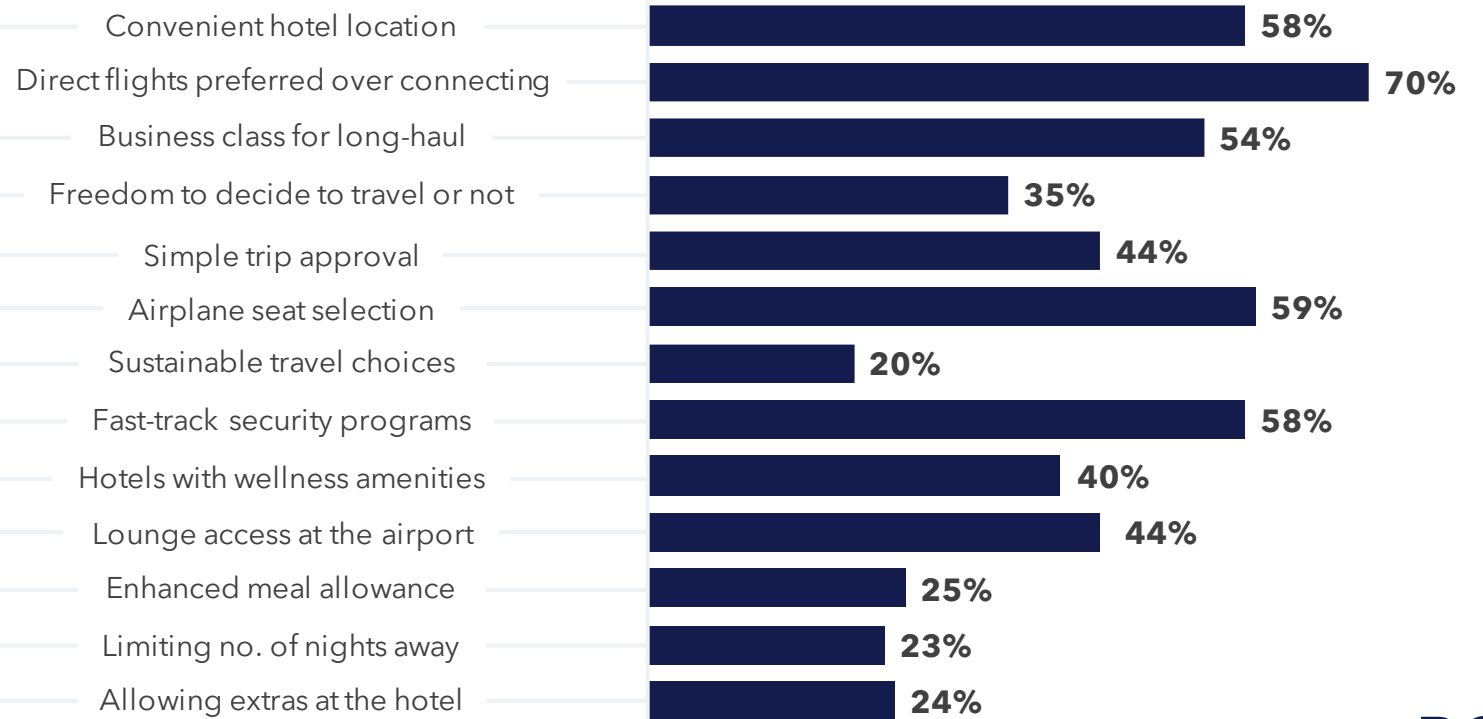
Top-five travel policies with the supply-demand gap



TRAVEL BUYERS OFFER



TRAVELERS WANT



* See [Traveler Wellbeing Survey](#)

Wellbeing support for business travelers

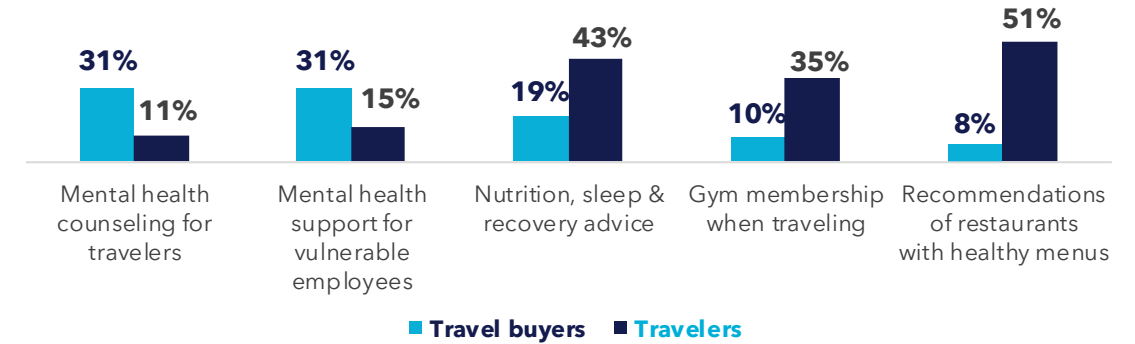
When it comes to dedicated wellbeing support, travel buyers tend to offer mental wellbeing options, such as training in stress management or mental counseling.



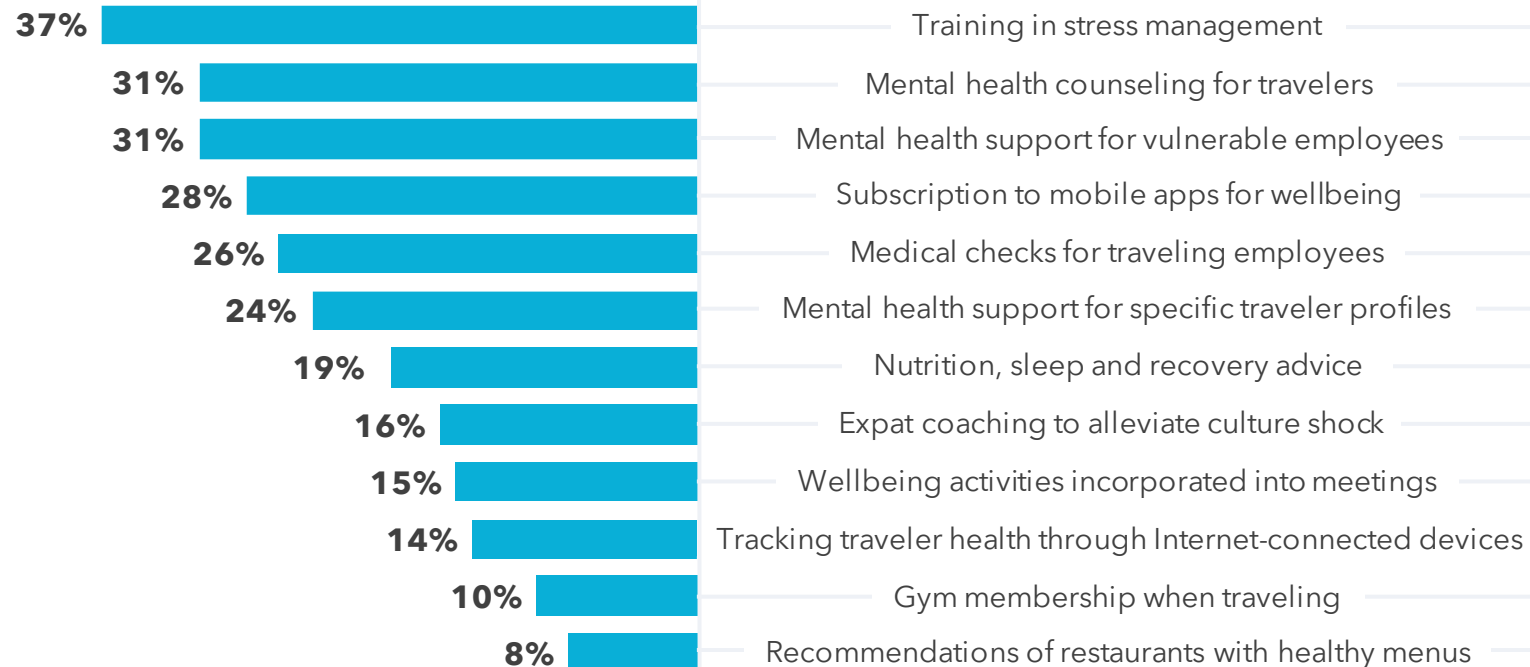
Wellbeing support: Travel buyers vs. travelers

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

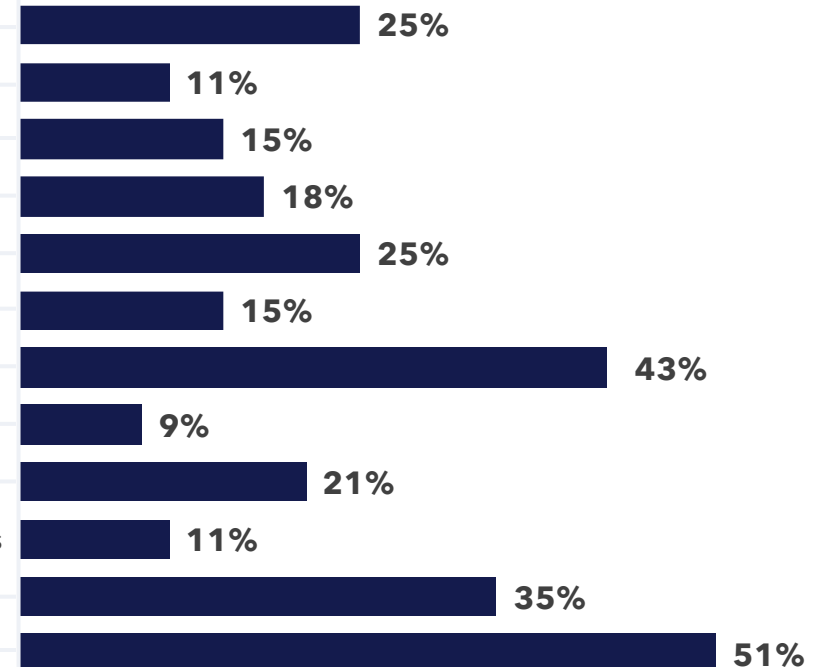
Top-five wellbeing support measures with supply-demand gap



TRAVEL BUYERS OFFER



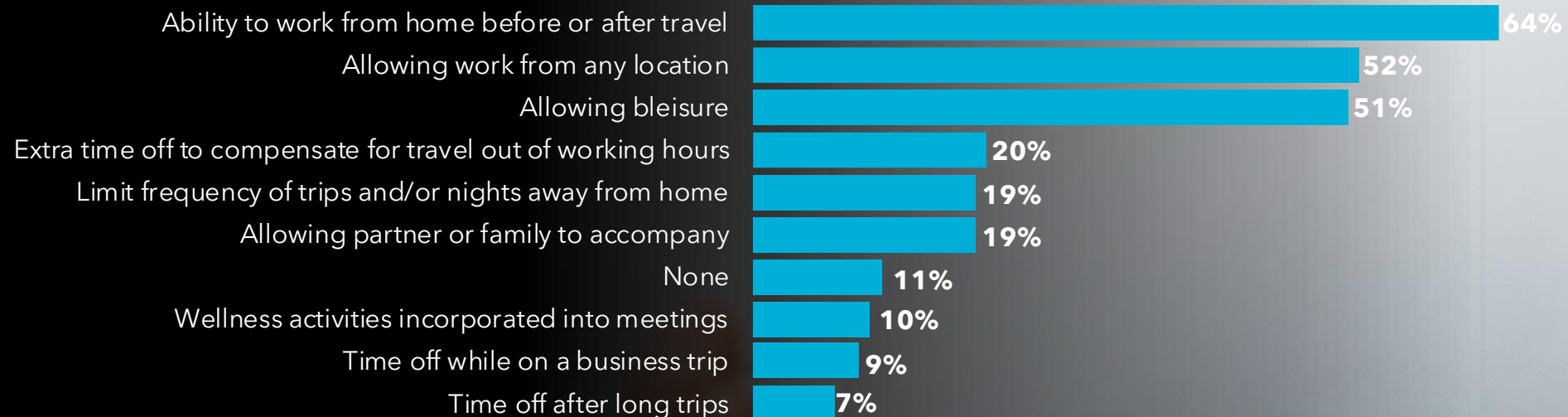
TRAVELERS WANT



* See [Traveler Wellbeing Survey](#)

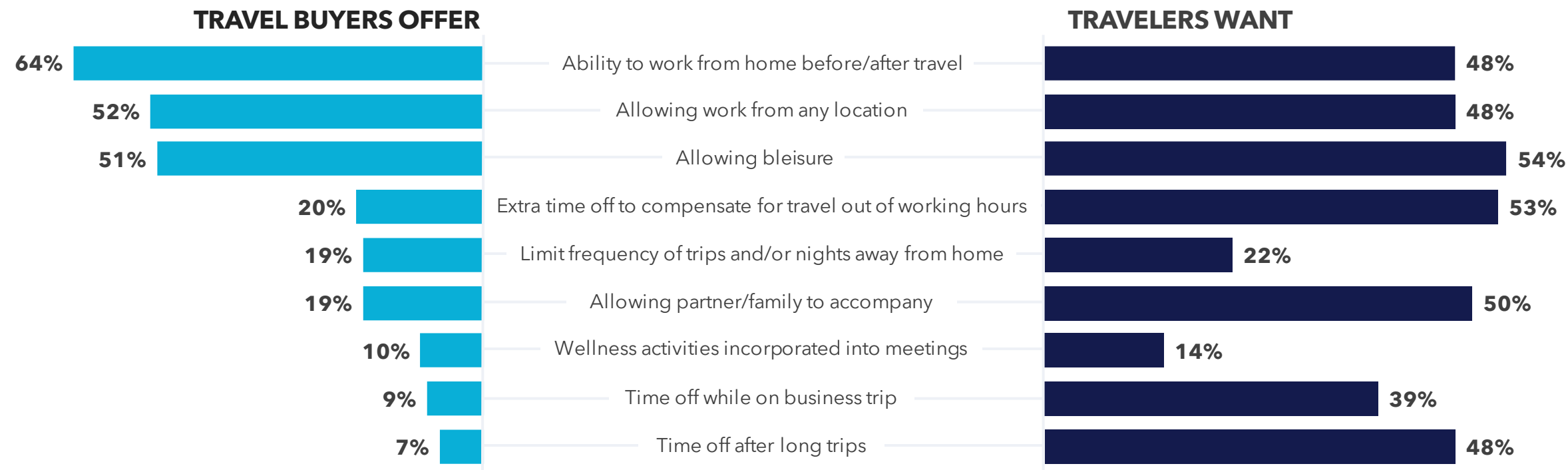
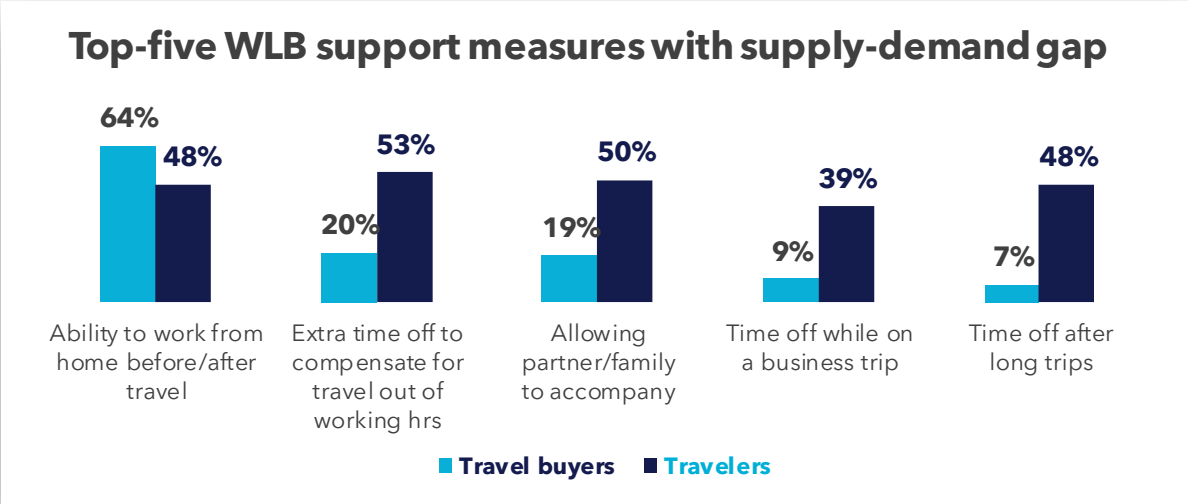
Work-life balance support for business travelers

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.



* See [Traveler Wellbeing Survey](#)

Suppliers and tools

[Wellbeing-oriented travel suppliers](#)

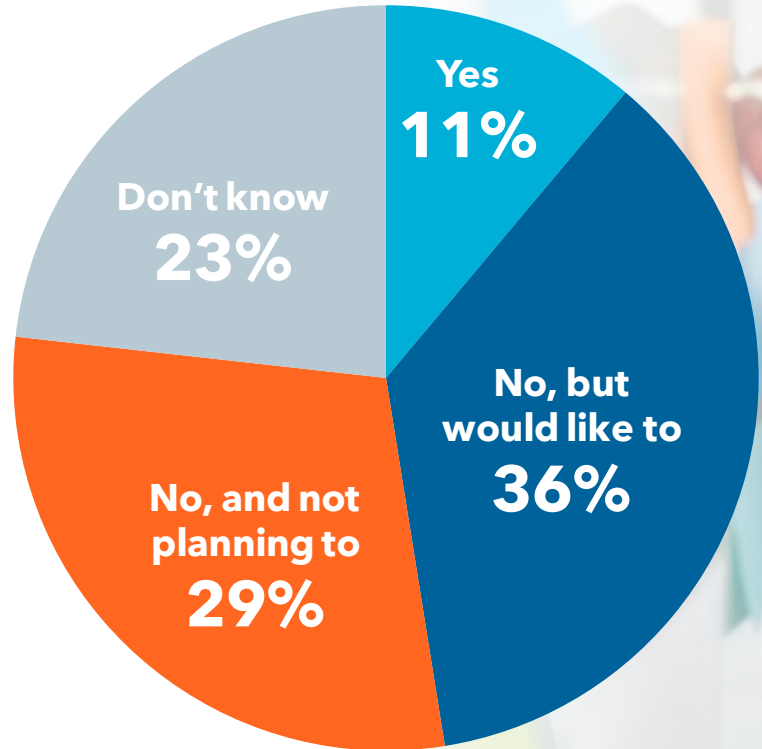
[Wellbeing solutions](#)

[Mobile apps for wellbeing](#)



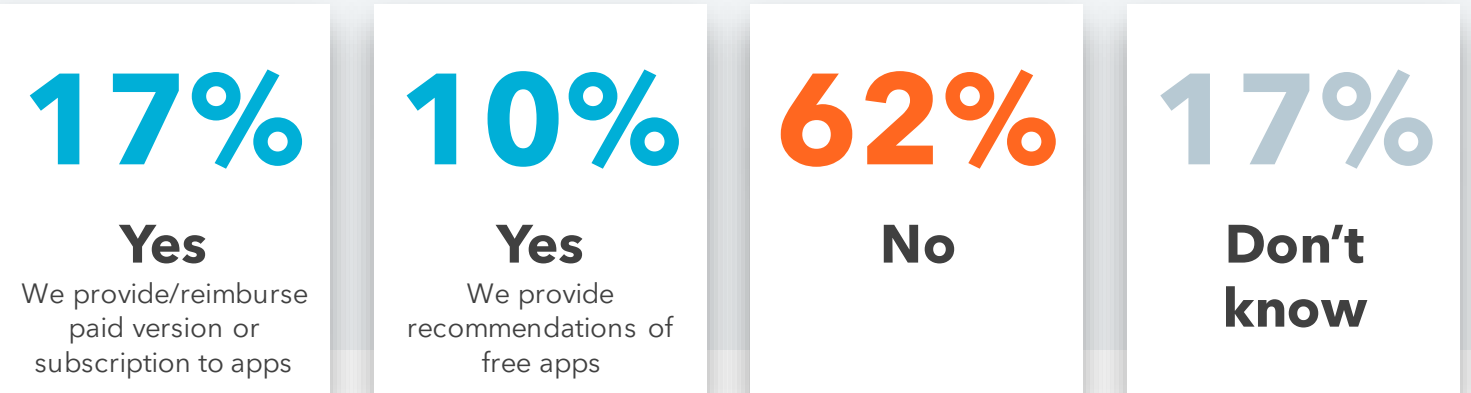
Partnering with wellbeing-oriented travel suppliers

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

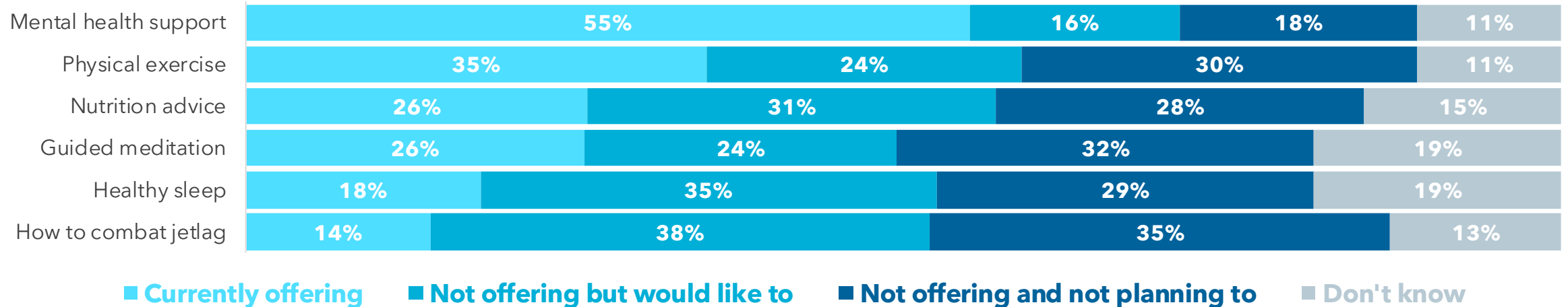


Wellbeing solutions and apps

Do you offer mobile apps aimed at improving traveler wellbeing?



What wellbeing solutions do you provide to your travelers?



Workplace policies

[Current workplace policy](#)

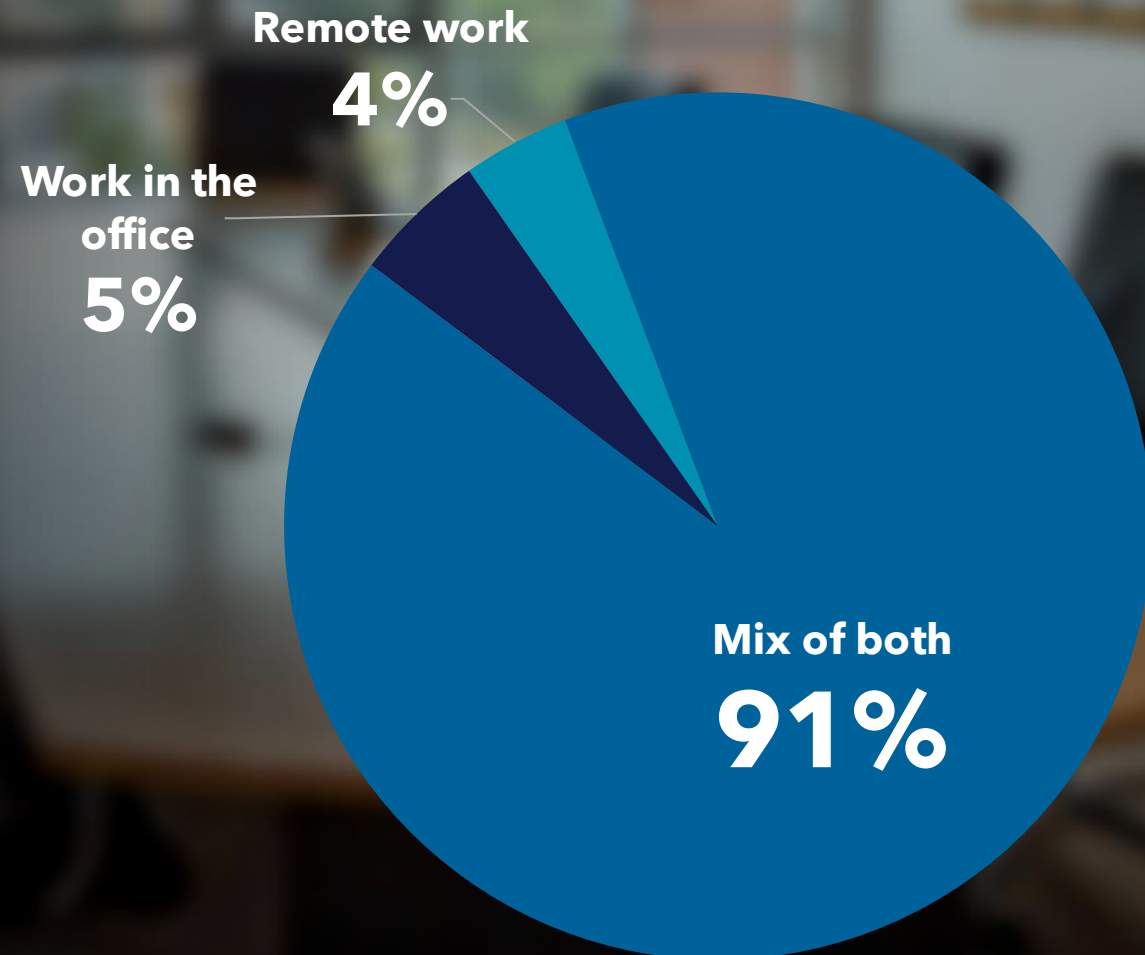
[Digital nomads](#)

[Travel managers' role](#)



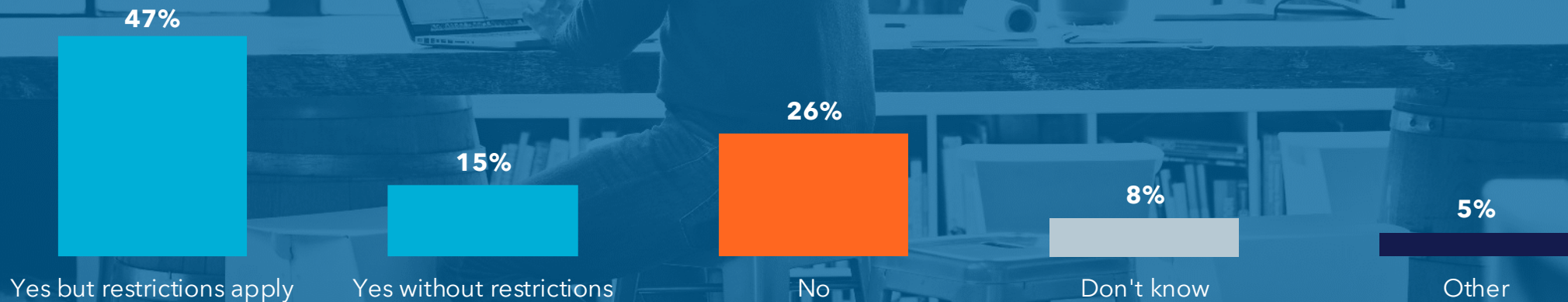
Current workplace policy

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



Employees as digital nomads

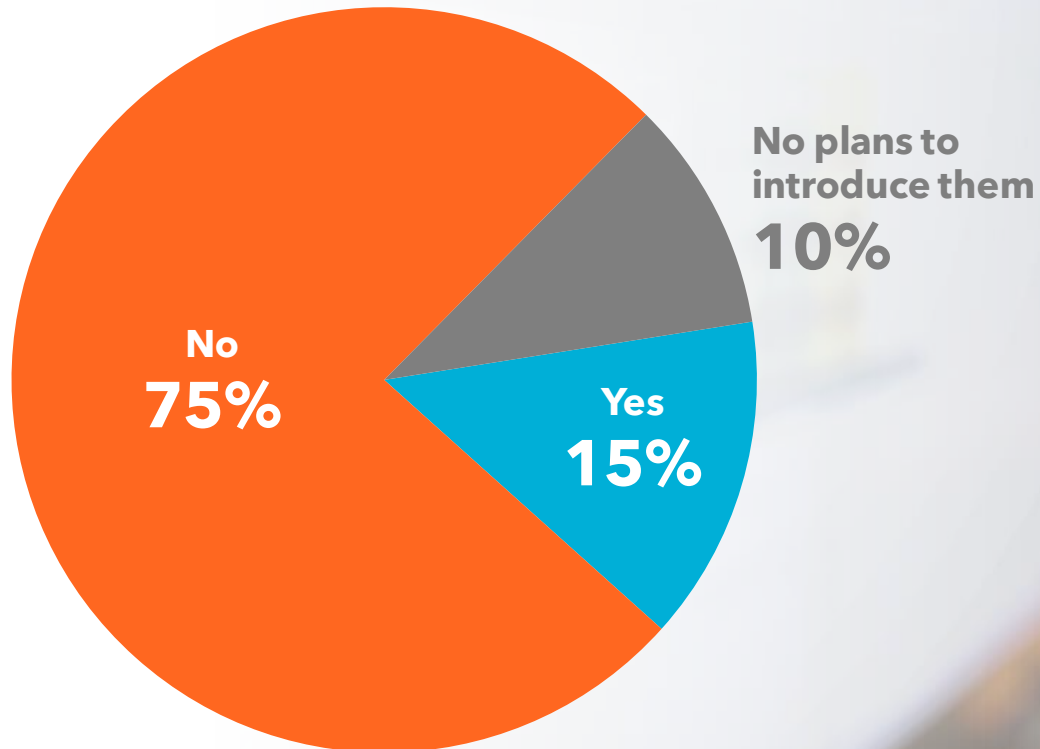
Does your employer allow its employees to work from any place as digital nomads?



Is your company planning to introduce / extend digital nomad policy?



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



KPIs and Outlook

[Traveler wellbeing KPIs](#)

[Information about traveler wellbeing](#)

[TMC support](#)

[Challenges to introducing traveler wellbeing policies](#)

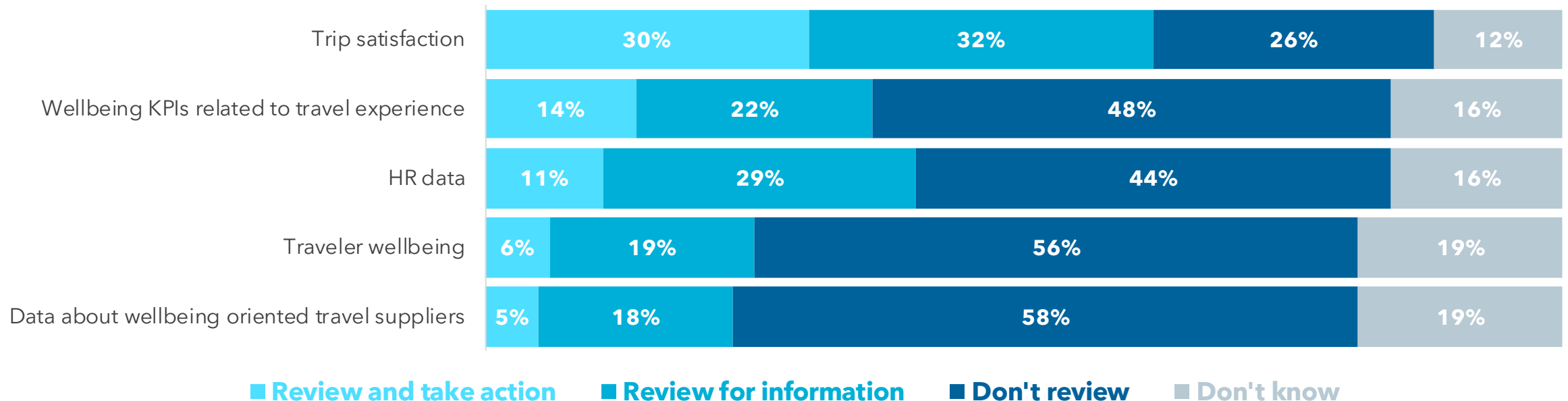
[Traveler wellbeing trends](#)

[Traveler wellbeing support outlook](#)



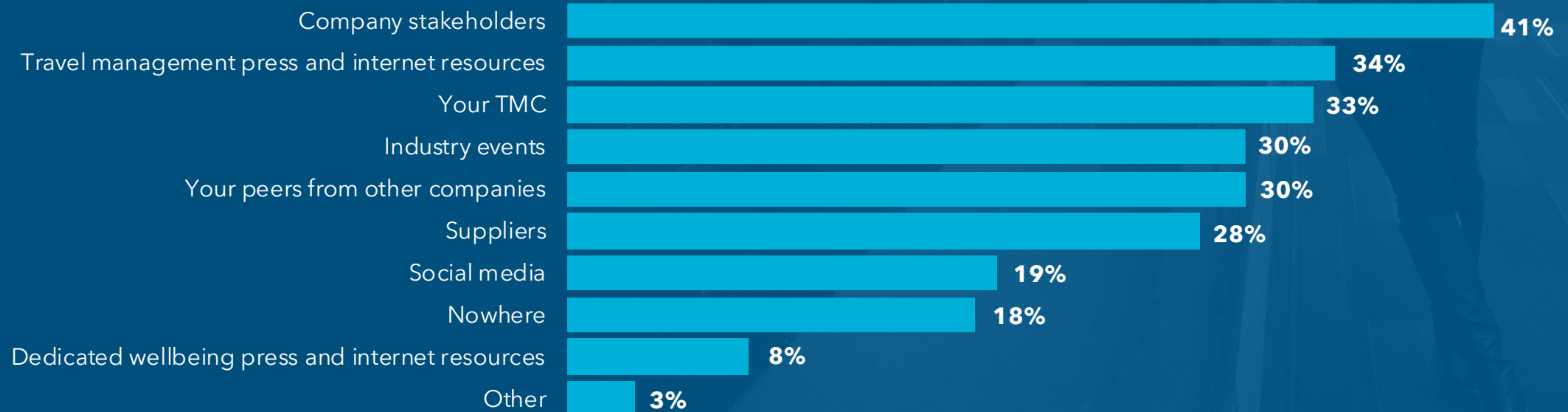
Traveler wellbeing KPIs

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.



Information about wellbeing

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



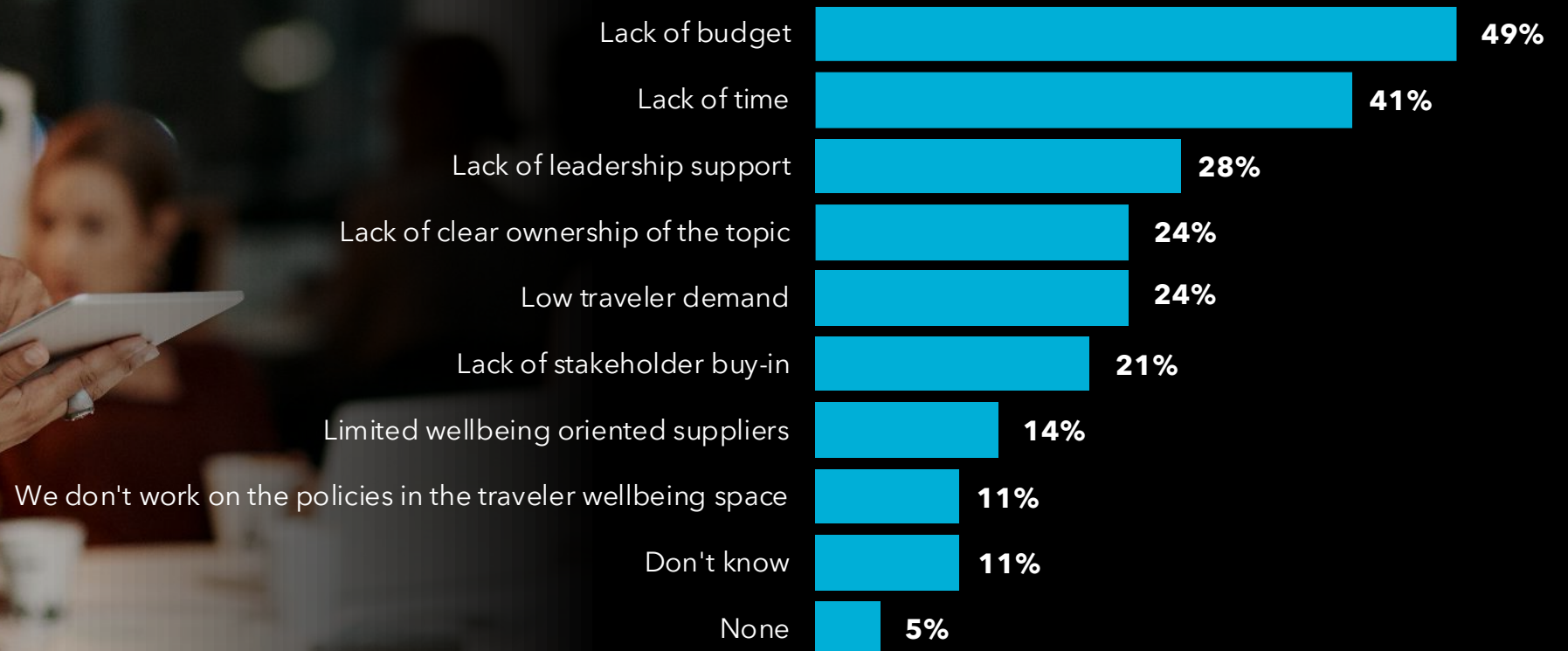
TMC support

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



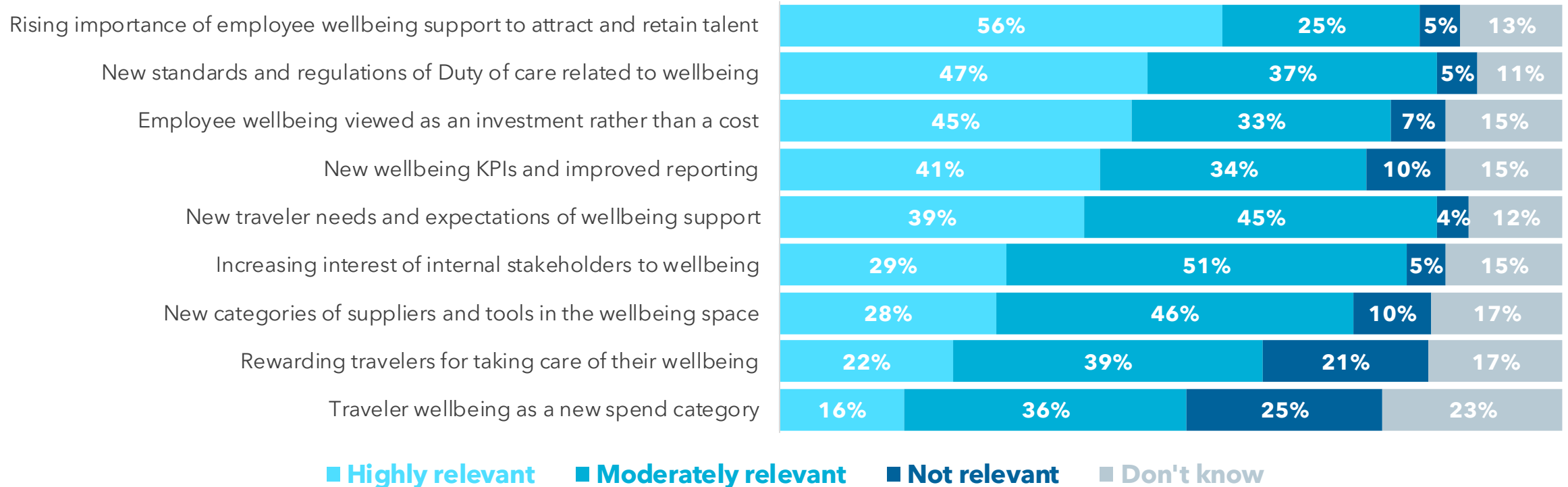
Challenges to introducing traveler wellbeing policies

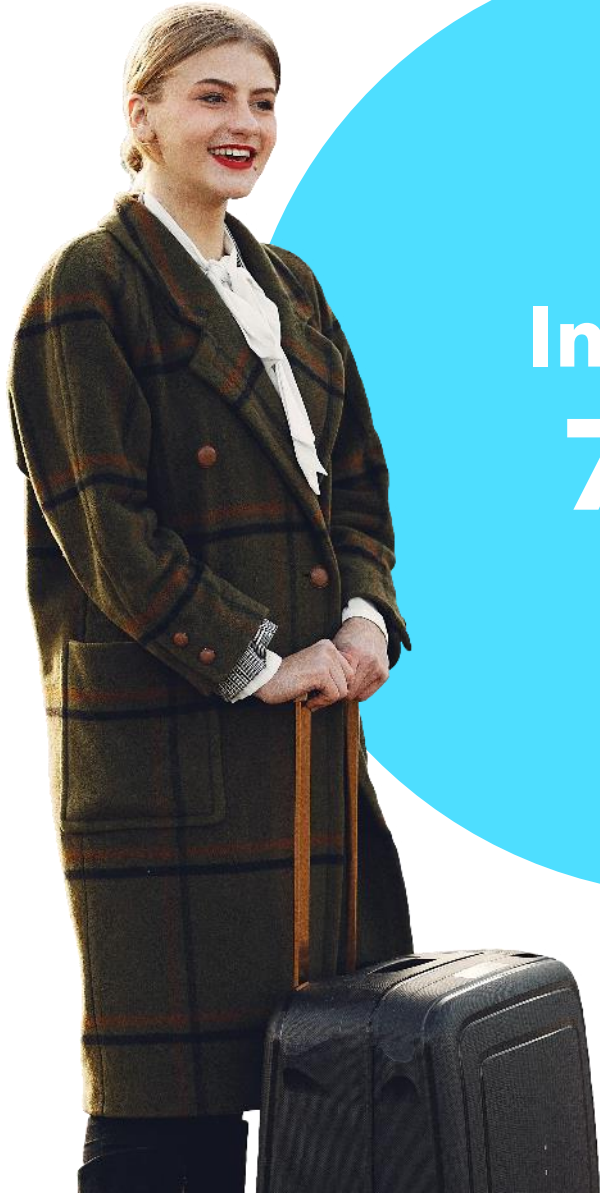
Lack of budget and time are the two major roadblocks to introducing and expanding the range of traveler wellbeing policies.



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.





Increase
76%

Decrease
1%

The same
16%

Don't Know
7%

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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