

TRAVELER WELLBEING:
GET MOVING

Research Insights



May 2023

Introduction

This is the first in a series of Insights reports on Traveler Wellbeing, which have been compiled by BCD Travel together with our Marketplace travel wellness partner Sanctifly, the global provider of healthy leisure and wellness alternatives for airport downtime. This report explores travelers' attitudes to physical activity and their behavior whilst on the road, assessing the importance of fitness among business travelers.

The Insights on Traveler Wellbeing combine data from both traveler and travel buyer wellbeing surveys conducted by BCD in 2022, as well as data compiled by Sanctifly.

Sanctifly provides access to over 3,500 premium airport activities, exclusive membership benefits, bespoke travel wellness content from industry experts and carefully curated healthy airport guides, all within one app. It aims to make traveler experience more pleasant and healthy. Members enjoy access to thousands of gym and pool locations worldwide to workout and energize, as well as luxury hotel gym, pool and spa facilities to boost traveler wellbeing.



This report explores **travelers' attitudes to physical activity and their behavior** whilst on the road

Why physical activity is important

Travelers recognize the importance, but face challenges

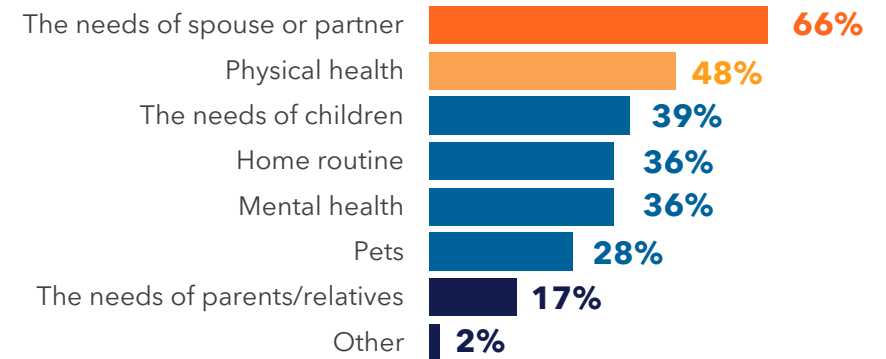
Regular exercise is incredibly important for overall wellbeing. Building good habits around exercise results in lasting positive effects on physical and mental health, which influence all spheres of life. As reported by business travelers, physical health is the second most significant factor impacting their travel arrangements, after the needs of their spouse or partner.

Regular exercise has been shown to improve mood, reduce feelings of anxiety and stress, increase energy levels, improve circulation and help with sleep quality and relaxation. For frequent travelers, maintaining the routines they've established at home can have a grounding and calming effect, helping them navigate unfamiliar and stressful situations.

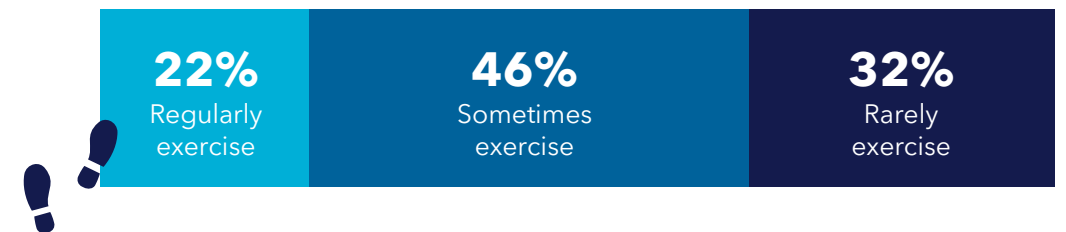
Despite all positive effects of physical activity, only 2 in 10 business travelers manage to exercise regularly when traveling, although almost half sometimes manage to do so. A third of travelers rarely find time to exercise away from home.

Maintaining a healthy fitness routine while on the road can be difficult. Business travelers must deal with tight schedules, unfamiliar surroundings, poor sleep schedules and so much more. Their time and energy are directed to other things and fitting in a good workout is often tricky.

Factors influencing business trips



Maintaining traveler wellbeing on the road



How to get moving on a trip

Having access to sports and fitness facilities is valued by travelers

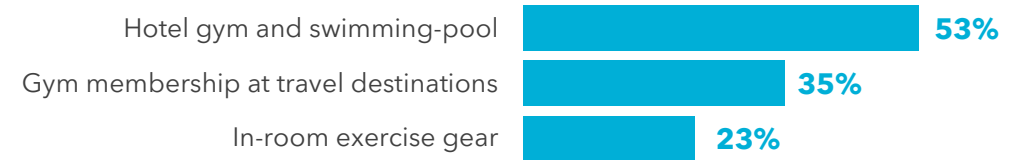
According to BCD's Traveler Wellbeing Survey, a lack of exercise is one of travelers' major concerns while on a business trip, as reported by 26% of respondents.

Various corporate initiatives dedicated to improving physical wellbeing of traveling employees may not only boost traveler health but could also improve their experience on the road. Access to gyms, swimming pools and exercise gear are among the important support measures travelers would like to see employers provide.

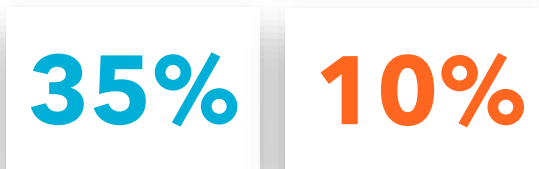
There's a strong desire for their hotel accommodation to feature these facilities. In fact, more than half of business travelers say that a hotel gym and swimming-pool contribute positively to their physical wellbeing on a business trip. Every fourth respondent would like to have access to exercise gear in a hotel room.

While fitness facilities at hotels are in high demand, a third of business travelers say they would use sports facilities outside of their accommodation while at their destination. They're interested in their employer subsidizing gym membership. Presently, only 10% of employers offer this option, according to the findings of our travel buyer survey.

Physical wellbeing support for business travelers



Gym membership: Demand vs. supply



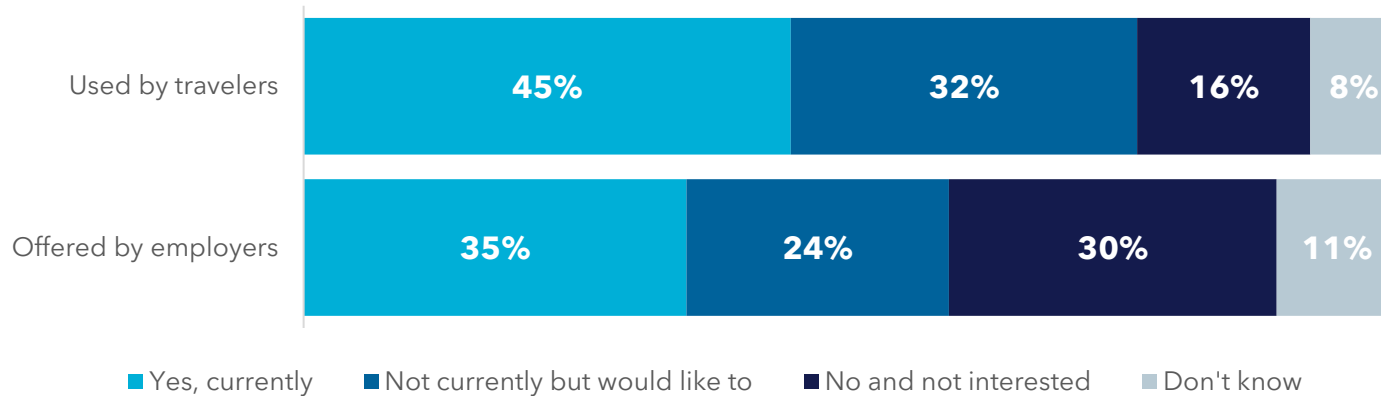
Mobile apps for physical wellbeing

Technology could help travelers exercise while being away from home

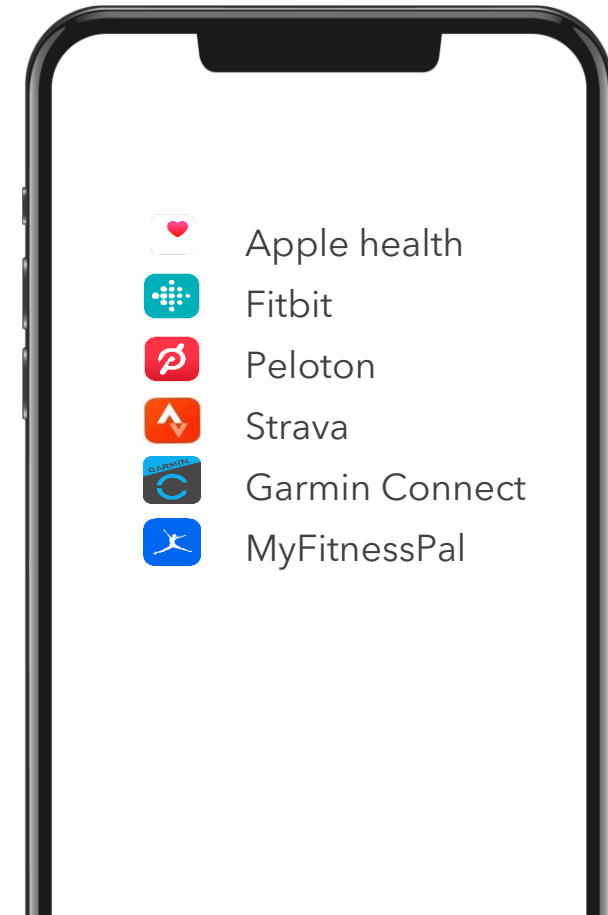
Technology may be a good support measure to help employees maintain their physical wellbeing on the road. Currently, 58% of business travelers use various apps for wellbeing and three quarters are likely to apply physical health support tools and services provided by the employer.

Among travelers, 45% currently use mobile apps to exercise effectively. Another third would like to use them. On the supply side, 35% of travel buyers report their companies offering these apps, and a quarter planning to provide them.

Wellbeing apps for exercising



Most popular apps for physical wellbeing among business travelers



Traveler interest in fitness and wellness



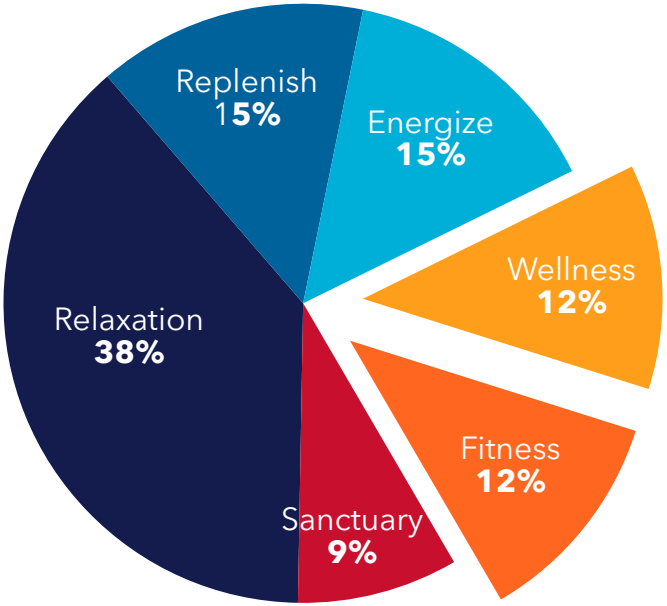
Travelers search for airport facilities to exercise on the road

Our Marketplace partner Sanctifly offers travelers a choice of airport activities to boost their personal wellbeing. These activities may require anything between one and six hours or more depending on the needs of clients and the free time at their disposal, as they are usually practiced either before a flight or in-between connecting flights.

All the activities can be classified by mood which reflects traveler interests. Here are six major categories of mood and the corresponding services available to book through a Sanctifly app:

- Relaxation: airport lounge options
- Replenish: cafes, restaurants, shops with fresh food
- Energize: shower amenities and walks
- Wellness: gym, pool, spa and massage options
- Fitness: gym, pool, runs and walks
- Sanctuary: quiet places to disconnect, such as lounges and hotel spaces

Traveler search: By mood



Fitness and **wellness** are popular categories of traveler service. Among all activities, in the last six months (Oct. 6, 2022 - April 4, 2023), fitness facilities were searched by 12% of all travelers at various airports and hotels nearby. Similar share of travelers were interested in wellness amenities. The popularity of both categories keeps growing.



We are seeing a sharp rise in the average traveler airport downtime. In 2023, over 65% of searches in the Sanctifly App are by members with 3 hours or more to spend at the airport. Traditional airport lounges are full and not designed to deal with this 3+ hour demand. We need to provide more options, options that inspire movement and recreation.

Karl Llewellyn, Founder, Sanctifly





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