

TRAVELER WELLBEING:

RESET YOUR MINDSET

Research Insights

June 2023



Introduction

This is the fourth 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 looks at the possibilities for travelers to relax, disconnect and reset mentally during business trips, exploring their behavior and demand for corporate support of their work-life balance.

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' interest in work-life balance support** from their employers **and their behavior** on the road

Troubles and benefits of business travel

Business travel can be hard and rewarding, at the same time

Having a road warrior lifestyle can undoubtedly take a toll on a traveler's mental and physical health. Being hired for a job that calls for traveling can be attractive to many, although no one is taught how to properly manage travel. It may easily become overwhelming, tiring, and detrimental to health and wellbeing, causing anxiety and exhaustion. Here comes the catch 22: As reported by business travelers, physical and mental health, in their turn, significantly influence travel arrangements. By not recognizing what triggers their poor wellbeing, travelers miss the opportunities to optimize the benefits that travel has proven to provide.

Travelers may blame constant business travel and the stress associated with it for exhaustion and a lack of motivation. But that's just part of the story. Apart from giving employees a chance to thrive professionally, travel may prepare them to be emotionally receptive towards others while deepening their cultural understanding. Travelers are exposed to new ways of thinking and doing business which can improve their skills. Traveling also helps develop soft skills such as communication, time management, organization and problem solving. By enabling them to explore new places, business travel can open travelers' minds to new experiences. Dedicating time to leisure activities while on a business trip can be particularly rewarding.

Blended travel, when travelers can combine business trips with leisure, adding a few days to their trips or simply exploring the business destination after work, is not a new concept. Post-pandemic, however, it has considerably increased its importance. In 2022, half of business travelers were likely to add leisure elements to their business trips, according to survey results.

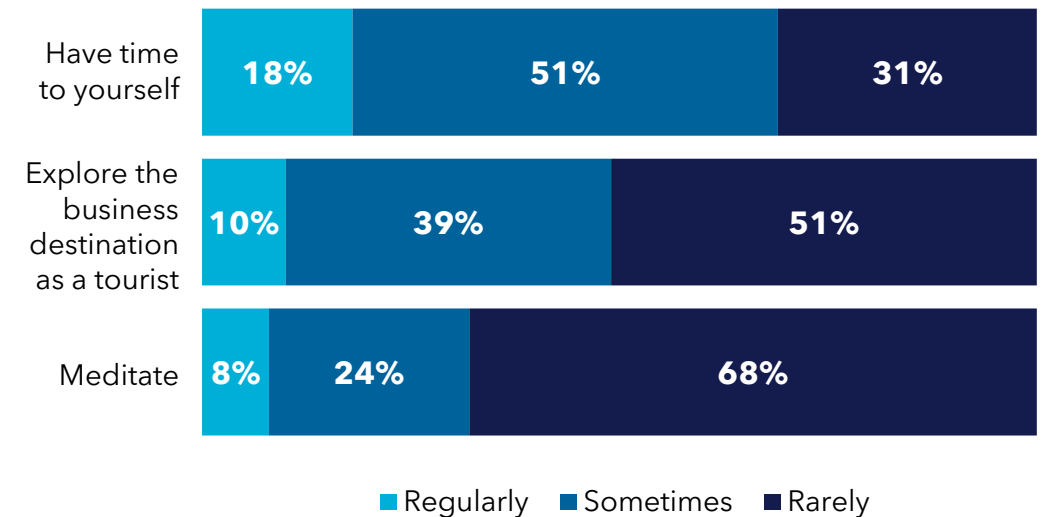
Despite high interest in blending business with leisure, only 1 in 10 business travelers regularly practice this. 4 in 10 sometimes manage to do so, while half of travelers rarely find time for tourism on business trips. This is not surprising given limited free time at their disposal. Only 18% report having time when traveling for work, while a third rarely do so.

Meditation is yet another activity helping travelers to relax and disconnect, but less than 10% regularly meditate on the road. A quarter do so rarely, while a vast majority never meditate.

Traveler adding leisure elements to business trips



Maintaining traveler wellbeing on the road



How to disconnect on a business trip

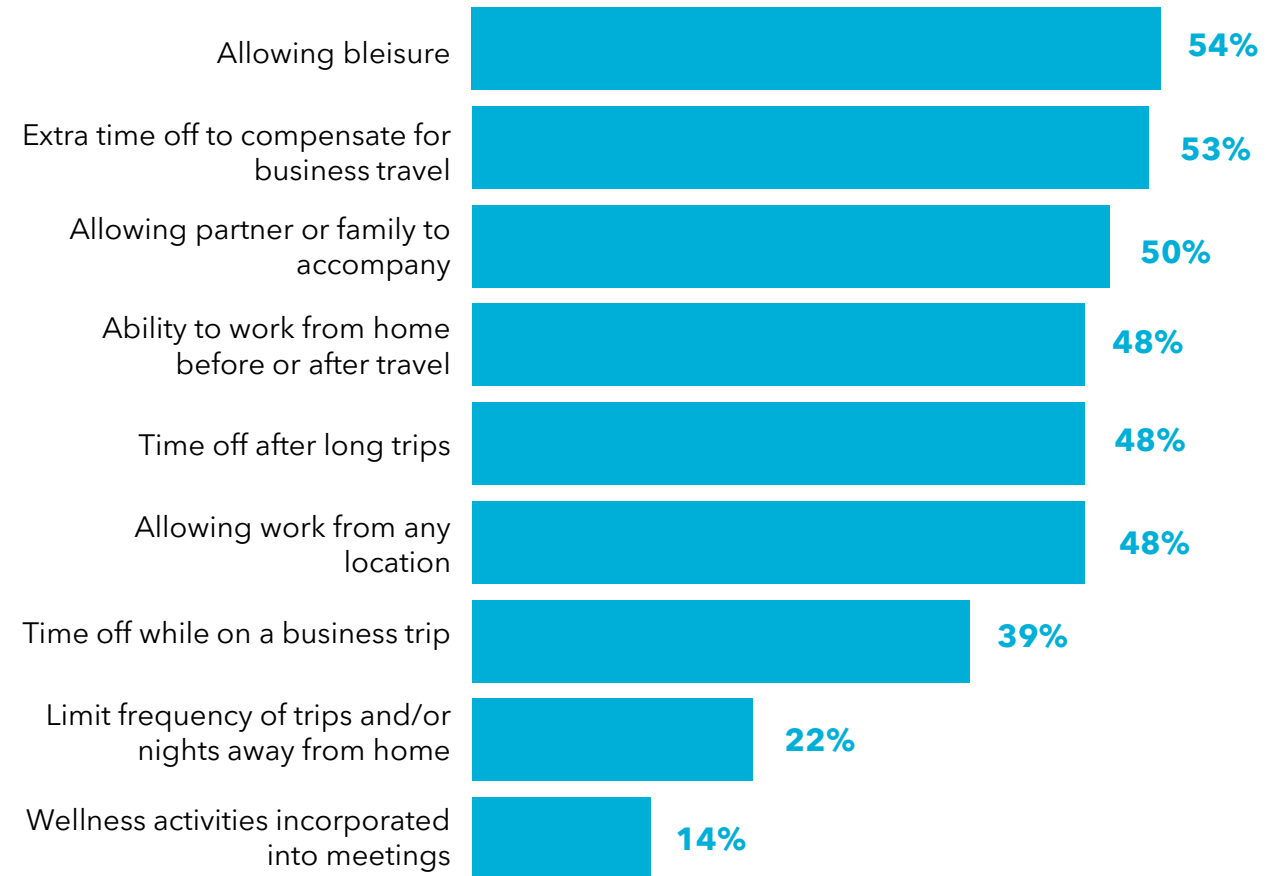
Travelers demonstrate high demand for work-life balance support

According to BCD's Traveler Wellbeing Survey, business travelers have a high demand for work-life balance support from their employers. Meanwhile, these measures typically are not on the agenda of travel buyers and are offered quite rarely.

Every fifth traveler is worried about lack of free time whilst on a business trip, naming it a stress factor. Post-trip, travelers are concerned about the need to catch up on missed work and family responsibilities, all at once. This is never easy, but it becomes even harder when suffering from post-trip jet-lag and tiredness.

A number of corporate support measures could alleviate these concerns. Work-life balance support demanded by travelers focuses on two themes, namely the possibility to combine business trips with leisure and additional time off post-trip. The first can be satisfied by allowing blended trips, making it possible for companions to travel too and providing for time off during a trip. Travelers also want to be compensated for working out of hours or being away from home. Around half of travelers would like some extra time off, or even the chance to work from home before or after a business trip. These findings support the recent concept of digital nomads that gained traction during the pandemic and is here to stay.

Work-life balance for business travelers



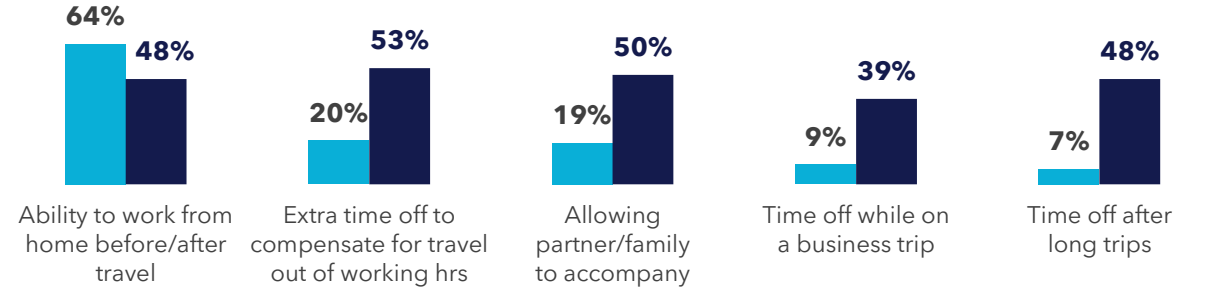
How employers could boost traveler work-life balance

Travel buyers offer just a few of the solicited measures

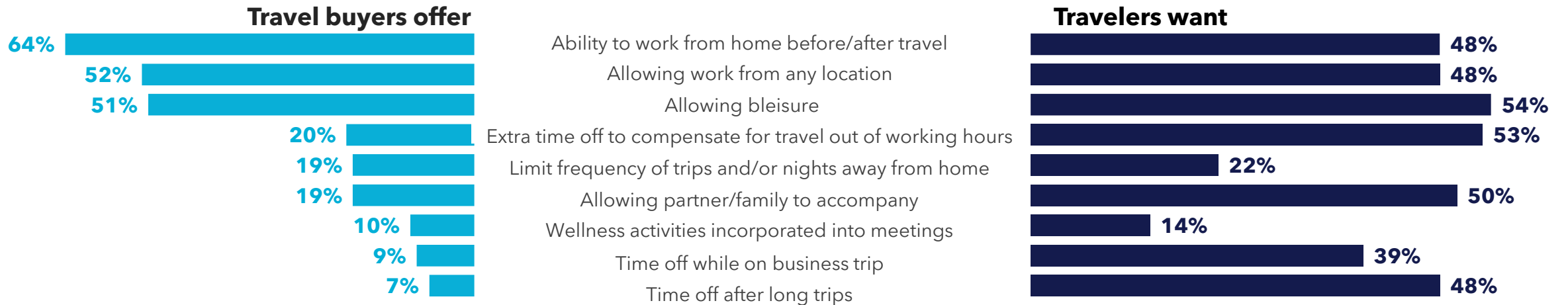
Our research shows a considerable gap between the work-life balance support that travelers would like to receive from their employers and the measures that travel buyers indicate employers offer. The biggest discrepancies exist when it comes to time off after or during business trips, allowing partners to accompany and additional time off to compensate for travel out of working hours. While highly appreciated by traveling employees, these measures are rarely provided by companies.

The situation with blended travel and flexibility to work away from the office is better: More than half of travel buyers provide these options to traveling employees.

Top-five WLB support measures with supply-demand gap



Work-life balance support: Travel buyers vs. travelers



Mobile apps to reset mindset

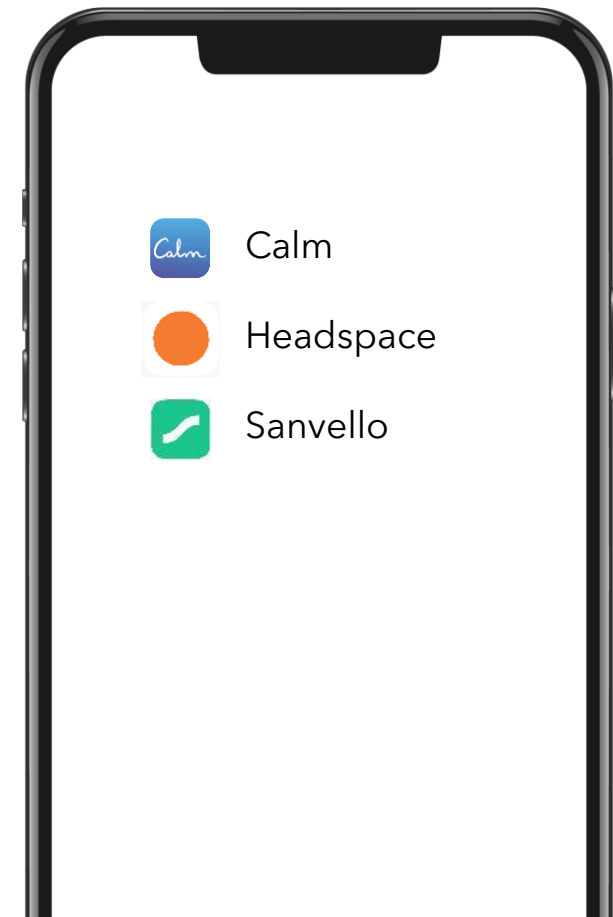
Technology could help travelers relax while being away from home

Technology could be of great help not only for physical but also mental wellbeing support while 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 their employer. Female travelers tend to use wellbeing apps more often: 73% of women apply these apps vs. 51% of men.

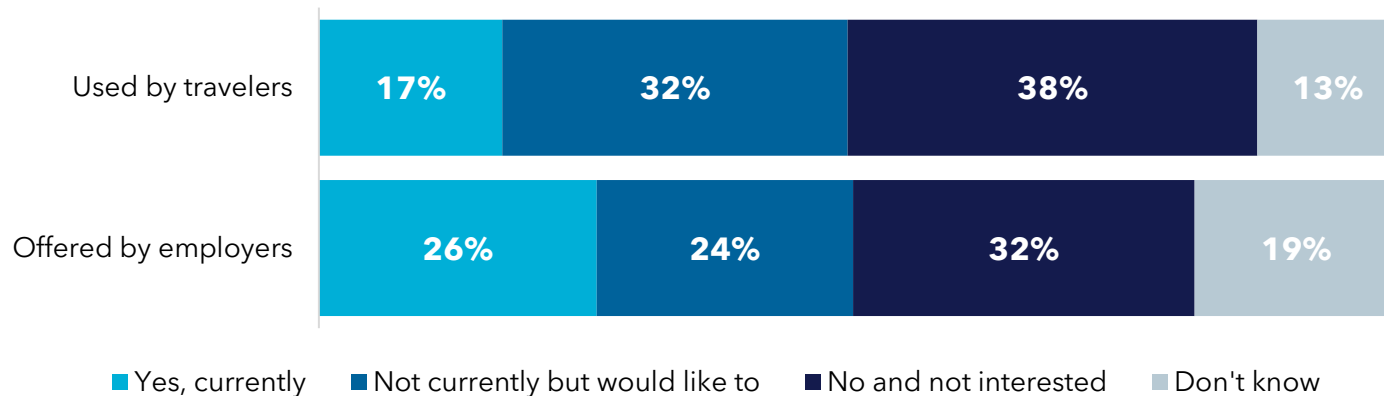
Among travelers, only 17% use mobile apps that provide guided meditation. 3 in 10 are interested in using them. Such apps are more popular with women: 30% use them, compared to just 10% of men. However, the intentions of both are similarly strong: 32% of all respondents would like to use these apps in the future.

On the supply side, 26% of travel buyers report their companies offering such apps, and a quarter planning to provide them. In comparison to the apps for physical wellbeing, mental wellbeing support apps are solicited less frequently. This topic still needs extra efforts to increase employees' awareness and encourage them to use external support.

Most popular apps for mental wellbeing among business travelers



Wellbeing apps for guided meditation



Traveler interest in facilities for relaxation

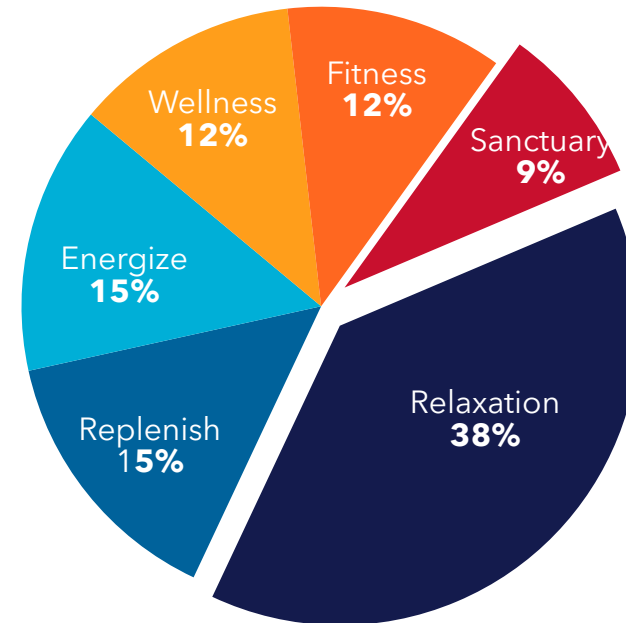
Travelers show high demand for airport facilities to reset their mindset

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



Relaxation is the most popular category of traveler service. Among all activities, in the last six months (Oct. 6, 2022 - April 4, 2023), relaxation facilities were searched by 38% of all travelers at various airports and hotels nearby. Besides, **Sanctuary** - the category that focuses on quiet places to relax - provoked interest of every tenth traveler. This year's biggest development for Sanctifly is a guide and easy access to hotel lobby areas and non-room guest services at luxury hotels near major travel hubs.



We are much more conscience of improving our resilience. Flying in the night before rather than a red eye, blocking time in the diary to stretch, hydrate and catnap really helps. We see employers encouraging recalibration, rather than the age old 'battle trough it' mentality.

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