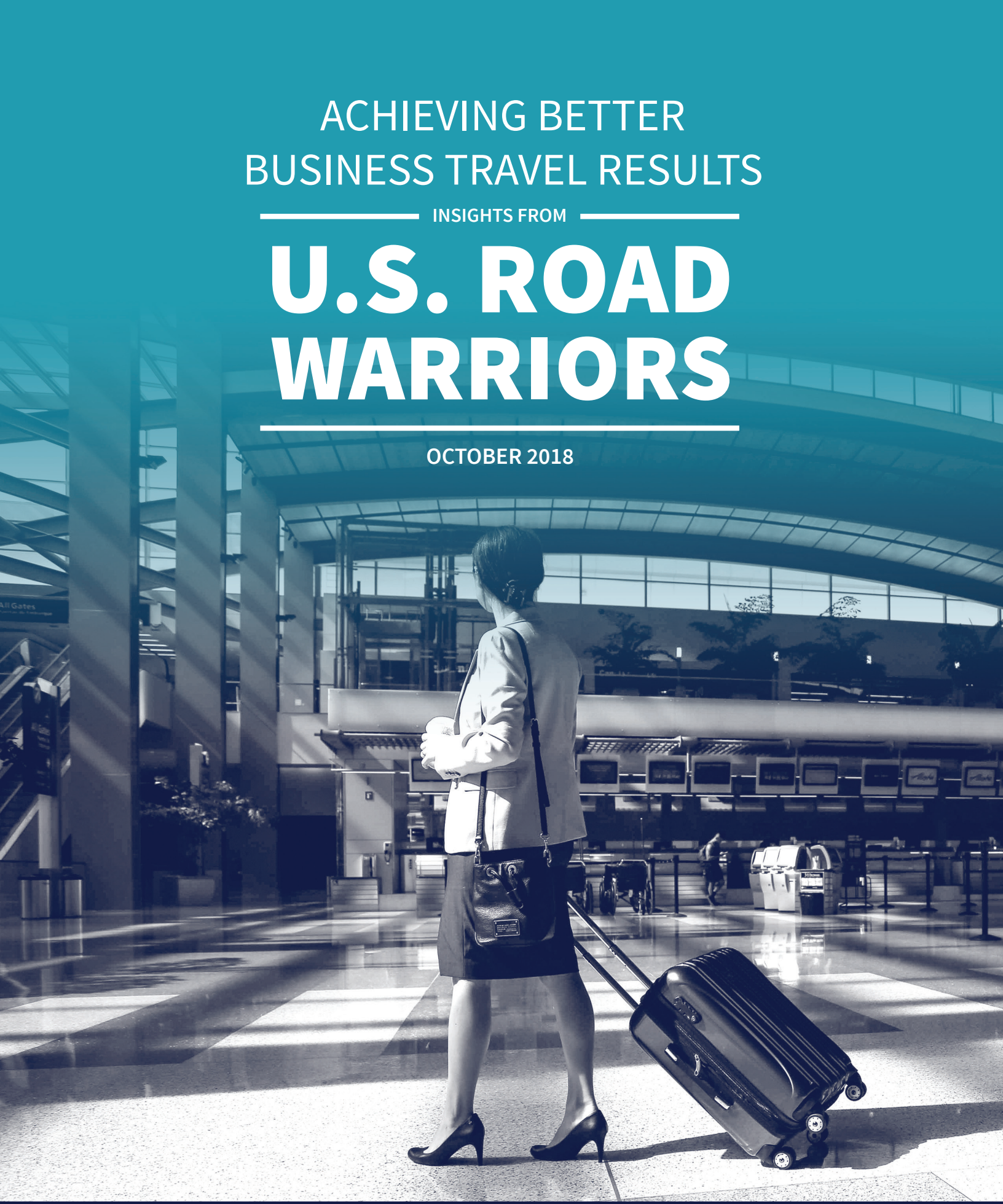


ACHIEVING BETTER BUSINESS TRAVEL RESULTS

INSIGHTS FROM

U.S. ROAD WARRIORS

OCTOBER 2018



Presented by



BACKGROUND

Recent research shows a clear link between cost-focused travel policies and undesirable business outcomes, such as fewer successful trips and higher road warrior attrition risk. This study identifies a wide set of factors, including travel policies, that can be expected to increase the rate of successful trips and decrease the risks of road warrior attrition, reluctance to travel and traveler burnout.

This study is based on responses from 742 U.S.-based road warriors, defined as those between 24 and 66-years-old who have taken at least four business trips, mostly by plane, and stayed at least 35 nights away from home in the last 12 months. The questionnaire was designed by tClara and administered by MMGY Global using the YouGov market research panel. Responses were collected between May 7 and 17, 2018. This report was written by MMGY Global and Scott Gillespie, based on MMGY Global's analysis of the data. The study was sponsored by the Airlines Reporting Corporation (ARC), Delta Air Lines, FlightGlobal and tClara. Scott Gillespie is head of analytics at ARC and CEO of tClara.



EXECUTIVE SUMMARY

Why Does This Research Matter to Senior Management?

Business travel has long been managed by focusing on cost savings. This study challenges the wisdom of that approach. Instead, senior management should prioritize trip success rates and road warrior retention.

“Cost savings are roughly one percent of the economic value added by road warriors, so it makes much more sense to focus on how to increase the road warrior’s value-add,” says Scott Gillespie, CEO of tClara. “This means increasing the road warrior’s trip success rate and their willingness to travel, and decreasing their burnout and attrition risks,” he adds.

This report examines insights from 742 US-based road warriors on the topics of trip success, attrition and retention, their desire to travel, and what burns them out. Findings reveal the negative impact of cost-focused travel policies; the keys to reducing road warrior attrition risk; the importance of traveler sleep, health and safety; and the benefits of better quality travel.

Senior executives can use these findings to significantly reshape their corporate travel program’s strategic priorities. Doing so should lead to more successful trips and better road warrior retention and wellness.

Improving Trip Success and Retention Rates Among Road Warriors

Road warriors, those who spent at least 35 nights away from home and took at least four trips by airplane in the last 12 months, say there is a 24 percent chance that they will voluntarily leave their employer in the next two years. The two top-rated ways to reduce this attrition risk are to allow business class seating on flights longer than six hours and to use less of the road warrior’s personal time for travel. An alarming 48 percent of road warriors say they hope to travel much less in two years. They view more comfortable travel and more rewards and recognition from airlines and hotels as the two most important factors for their willingness to keep traveling as much as they do now.

Furthermore, they rate only 63 percent of business trips as mostly or very worthwhile. Nearly three-quarters of all road warriors said these factors are very often or always important to their business trip success:

- Hotels (73 percent), especially a comfortable bed, pillows and temperature; a quiet room and good Wi-Fi
- Flights (68 percent), especially no cancellations or delays; non-stop flights and preferred seating
- Sleep quality (68 percent) before and during the business trip

Twenty-five percent of road warriors are significantly or extremely affected by jet lag. This highly affected group reports 20 percent fewer worthwhile trips, a 14 percent higher chance of leaving their jobs, and much less interest in traveling in two years compared to those less affected by jet lag.

Twenty-three percent of road warriors report high scores for anxiety or depression. When compared to road warriors with low to average anxiety and depression scores, this group has a two-year attrition risk twice as high (37 percent versus 17 percent), reports nearly half as many worthwhile trips (39 percent versus 75 percent) and

has far less interest in traveling in two years. Among this high-risk group, 73 percent say they get afraid during some business trips and 83 percent are interested in a road warrior wellness program. Notably, this high-risk group is 10 years younger than those in the low-risk group, averaging 37-years-old (versus 47-years old).

Seventeen percent of road warriors are presently or nearly burned out from travel. The main causes are too many nights away from home, the general stress of travel and travel's negative impact on their health and their families.

Significantly, when compared to those managed under traveler-focused travel policies, road warriors managed under cost-focused travel policies report:

- An attrition risk nearly twice as high (33 percent versus 17 percent)
- Fewer trips rated mostly or very worthwhile (57 percent versus 66 percent)
- Less willingness to travel in the future (57 percent versus 47 percent)
- Nearly twice the negative impacts from travel on their health and their families

Implications for Managing Road Warriors

A more strategic approach to managing road warriors should lead to significantly better business results. Senior management should track new travel-related metrics; especially road warrior attrition and trip success rates. Companies should invest in wellness programs tailored for road warriors. The expected benefits are better trip success rates, lower attrition risks and lower rates of traveler burnout. These programs should focus on ways to reduce anxiety and depression, reduce the negative impact of jet lag, improve the quality of sleep and improve on-trip behaviors related to diet and exercise.

Companies with cost-focused travel policies should consider changing to more traveler-focused policies if they want to increase trip success rates and decrease road warrior attrition risk. Allowing business class on flights longer than six hours, encouraging road warriors to use less of their personal time for traveling and helping travelers obtain better sleep on the road should all help achieve better business results. Traveler burnout is correlated with low-quality trips and number of nights away, so management should improve the quality of trips for their road warriors, monitor their tolerance for more nights on the road and reduce approval for trips less likely to be worthwhile.

FULL REPORT

Business Travel is About Business, Not Travel

“The only reason businesses spend money on travel is because they expect positive outcomes from those trips,” says Gillespie. “So travel programs should be designed to maximize those outcomes rather than to minimize travel costs.” This study focuses on the following four key measurable outcomes that, according to Gillespie, should be pillars of modern travel management.

Trip Success Rates

The most important outcome of any trip is whether or not it was successful at meeting its objective. Road warriors reported that only 63 percent of trips taken in the previous 12 months were mostly or very worthwhile. “What business wouldn’t want a higher trip success rate?” asks Gillespie.

Attrition Risks

Losing talent is costly. The average road warrior earns \$184,000 per year and typically has valuable skills and/or relationships that are not easily replaced. The average probability of voluntarily leaving in two years is 24 percent across all road warriors in this study. “Decreasing road warrior attrition risk should be a central goal for most every travel program,” says Gillespie.

Reluctance to Travel

As with any employee, road warriors’ personal and professional priorities change over time, so it isn’t surprising that many want to significantly reduce their travel workload in the future. “The problem is finding their willing replacements. Just as retention is better than attrition, so is reducing a road warrior’s long-term reluctance to travel,” offers Gillespie. “Nearly half of the surveyed road warriors said they want to travel much less in two years. Management needs to know what it can do to keep those highly valuable employees on the road.”

Traveler Burnout

“Getting burned out on travel appears to be a precursor to higher attrition risk and greater long-term reluctance to travel,” notes Gillespie. “It’s important to understand what causes traveler burnout and to monitor those who may be most at risk.”

New Benchmarks for Travel Management

Businesses can use this study to identify opportunities to improve on strategically important outcomes. The average outcomes across all 742 road warriors are:

- 63 percent trip success rate (the trips taken in the previous 12 months rated mostly or very worthwhile)
- 24 percent attrition risk (the probability of voluntarily leaving the current employer within two years)
- 48 percent want to travel much less in two years
- 17 percent are now or are nearly burned out on travel

Management needs to understand which factors contribute to these outcomes. This study analyzes a range of issues, all of which will help managers gain better business outcomes from their travel budgets.









New Implications for Managing Business Travel

Road warriors were asked about factors that could increase trip success rate, reduce attrition risk, help become less burned out on travel and decrease the reluctance to travel. Road warriors identified a wide range of factors that contribute to each of this study's four major outcomes. Additional factors were gleaned from analyzing differences within pairs of relevant cohorts. Taken together, these results provide management a new fact-driven framework for obtaining better business results from their travel budgets.

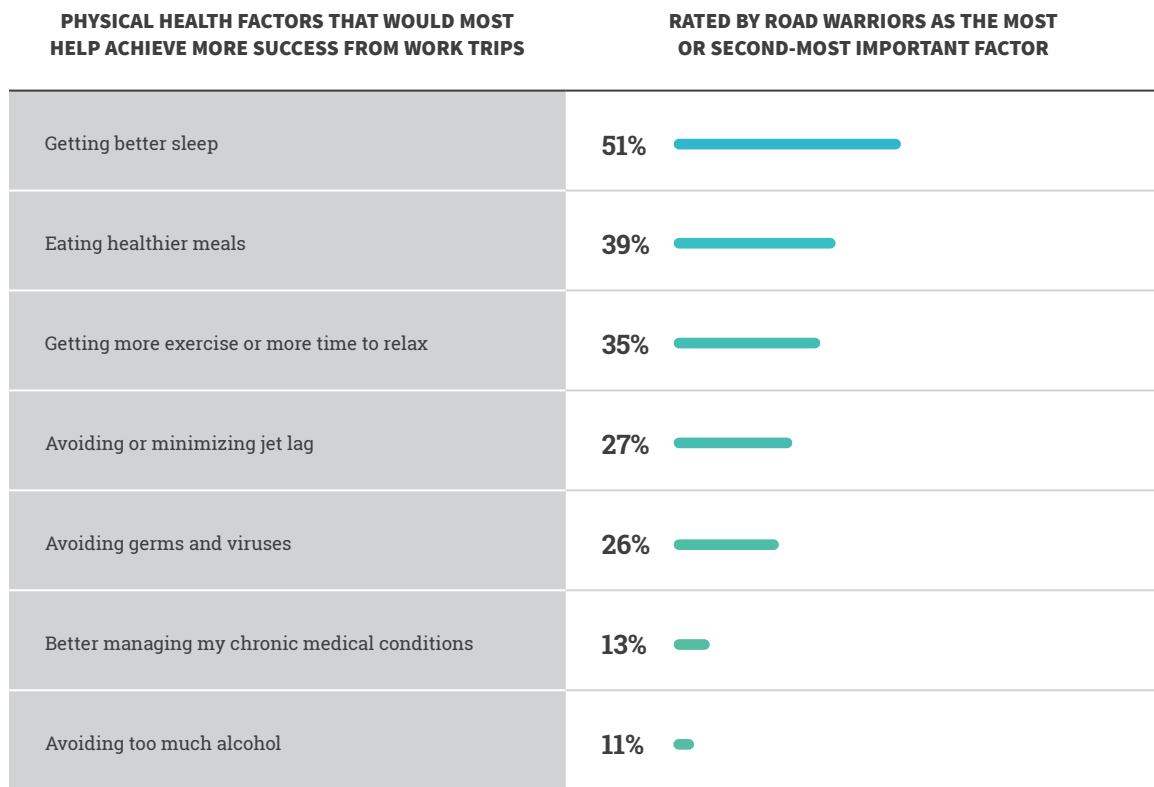
Road Warrior Advice to Improve Trip Success Rates

Road warriors rated only 63 percent of trips taken in the previous 12 months as mostly or very worthwhile. Road warriors were provided a list of factors and asked to select the two that would be most helpful for improving the success rate of their business trips.

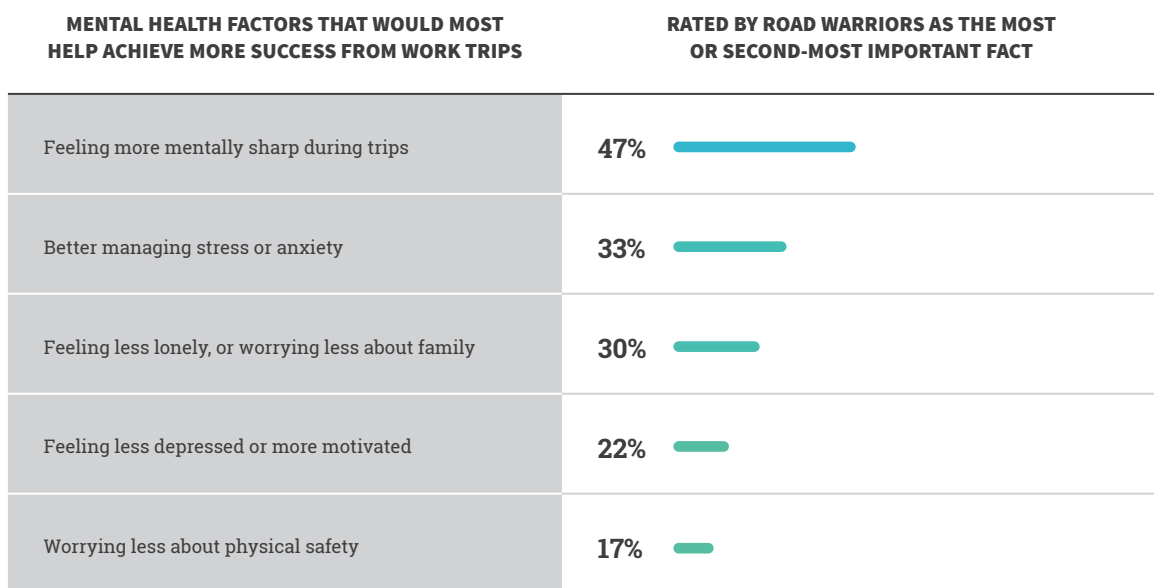
The two most popular choices among eight general factors were getting better sleep, followed by getting business class seating on long flights.

GENERAL FACTORS THAT WOULD MOST HELP ACHIEVE MORE SUCCESS FROM WORK TRIPS	RATED BY ROAD WARRIORS AS THE MOST OR SECOND-MOST IMPORTANT FACTOR
Getting better sleep before and during trips	34% 
Getting or keeping business class seating on flights over six hours	30% 
Having more exercise and/or healthier meals while traveling	27% 
Getting or keeping premium economy seating on flights under six hours	26% 
Getting higher quality or more convenient hotels	25% 
Using less personal time on work trips	22% 
Having more positive attitudes and emotions while traveling	18% 
Getting more non-monetary appreciation from manager for travel	17% 

When it comes to physical health factors affecting overall trip success, getting better sleep again tops the list, followed by eating healthier meals and getting more exercise or time to relax.











Mental health is an important factor in successful business trips. Nearly half of road warriors said feeling more mentally sharp would make their trips more successful.












Road Warrior Advice to Reduce Attrition Risk

Attrition is a significant challenge to businesses, as it is far costlier to attract and recruit new talent than it is to retain existing employees. Road warriors were asked which two factors would most encourage them to stay longer with their current employer. The most popular choices were allowing business class seating on long flights and using less personal time on business trips.

WHAT EMPLOYERS SHOULD OFFER TO DECREASE ATTRITION RISK	ROAD WARRIORS
Business Class seating on flights over six hours	31% 
Personal time needed for business trips	30% 
Higher quality or more convenient hotels	26% 
Premium economy seating on flights under six hours	25% 
Help getting more exercise and/or healthier meals while traveling	25% 
Help getting better sleep before and during trips	24% 
More non-monetary appreciation from managers for travel	21% 
Help generating more positive attitudes and emotions while traveling	18% 

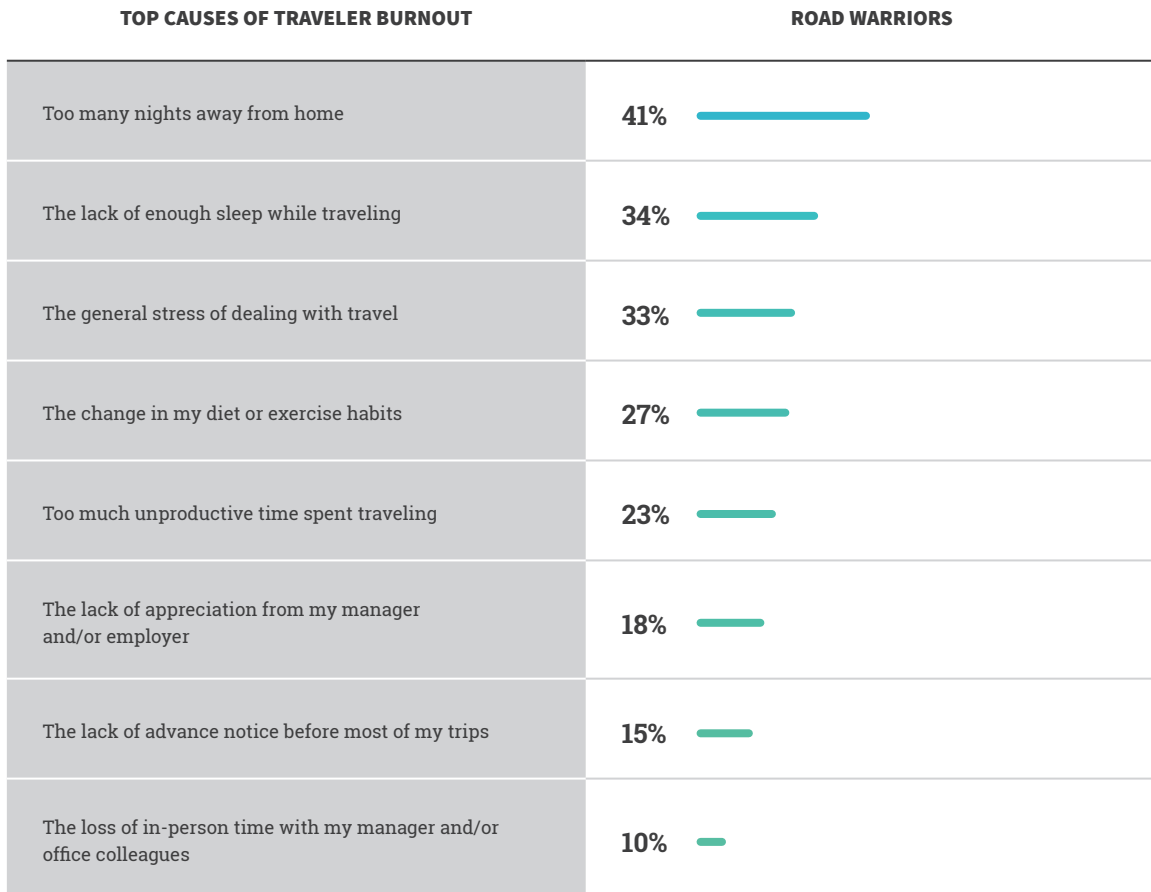
Road Warrior Advice to Decrease the Reluctance to Travel

Nearly half of road warriors – 48 percent – would like to travel much less in two years. Road warriors were asked which two factors were most important for maintaining their current travel schedule as a way to determine ways to help decrease their reluctance to travel. The most popular factors were more comfortable travel and more airline and hotel loyalty program rewards.

FACTORS IMPORTANT TO ROAD WARRIORS FOR CONTINUING TO TRAVEL AS FREQUENTLY	ROAD WARRIORS	
More comfortable travel	32%	
More rewards and recognition from airlines and hotels	29%	
A healthier lifestyle while traveling	26%	
Better sleep while traveling	26%	
Ways to make my travel easier on family/significant other	23%	
More productivity while traveling	20%	
Less use of personal time for traveling	18%	
Less stress, anxiety or fear while traveling	15%	
More non-monetary appreciation from manager and/or employer	11%	

Top Causes of Traveler Burnout

Nearly one in six road warriors (17 percent) report they are presently or nearly burned out on travel. The main cause of traveler burnout is nights away from home followed by the lack of sleep and the general stress of travel.



Cost-focused Travel Policies are Bad for Business and for Travelers

Road warriors who said they were managed by cost-focused travel policies reported significant negative outcomes when compared to those managed by traveler-focused policies.

BUSINESS OUTCOME	MANAGED BY COST-FOCUSED POLICIES	MANAGED BY TRAVELER-FOCUSED POLICIES	NEGATIVE CORRELATION WITH COST-FOCUSED TRAVEL POLICIES
Self-reported two-year attrition risk	33%	17%	Nearly twice the attrition risk
Trips rated worthwhile	57%	66%	Lower trip success rate
Travelers who desire much less travel in two years	57%	47%	More reluctance to travel
Travelers now or are nearly burned out on travel	20%	14%	More burned out on travel

Road warriors managed under cost-focused travel policies, compared to those managed under traveler-focused policies, are much less satisfied with their company's travel policy and report nearly twice the rates of negative impacts on their physical, mental and emotional health, as well as on relationships with their families.

PERSONAL OUTCOME	MANAGED BY COST-FOCUSED POLICIES	MANAGED BY TRAVELER-FOCUSED POLICIES	NEGATIVE CORRELATION WITH COST-FOCUSED TRAVEL POLICIES
Satisfied with current travel policy	59%	91%	Much less satisfied with travel policies
Negative impact on physical health	35%	17%	Twice as poor physical health
Negative impact on emotional health and happiness	18%	10%	Nearly twice as poor emotional health
Negative impact on family/SO	32%	17%	Nearly twice as poor impact on family/SO

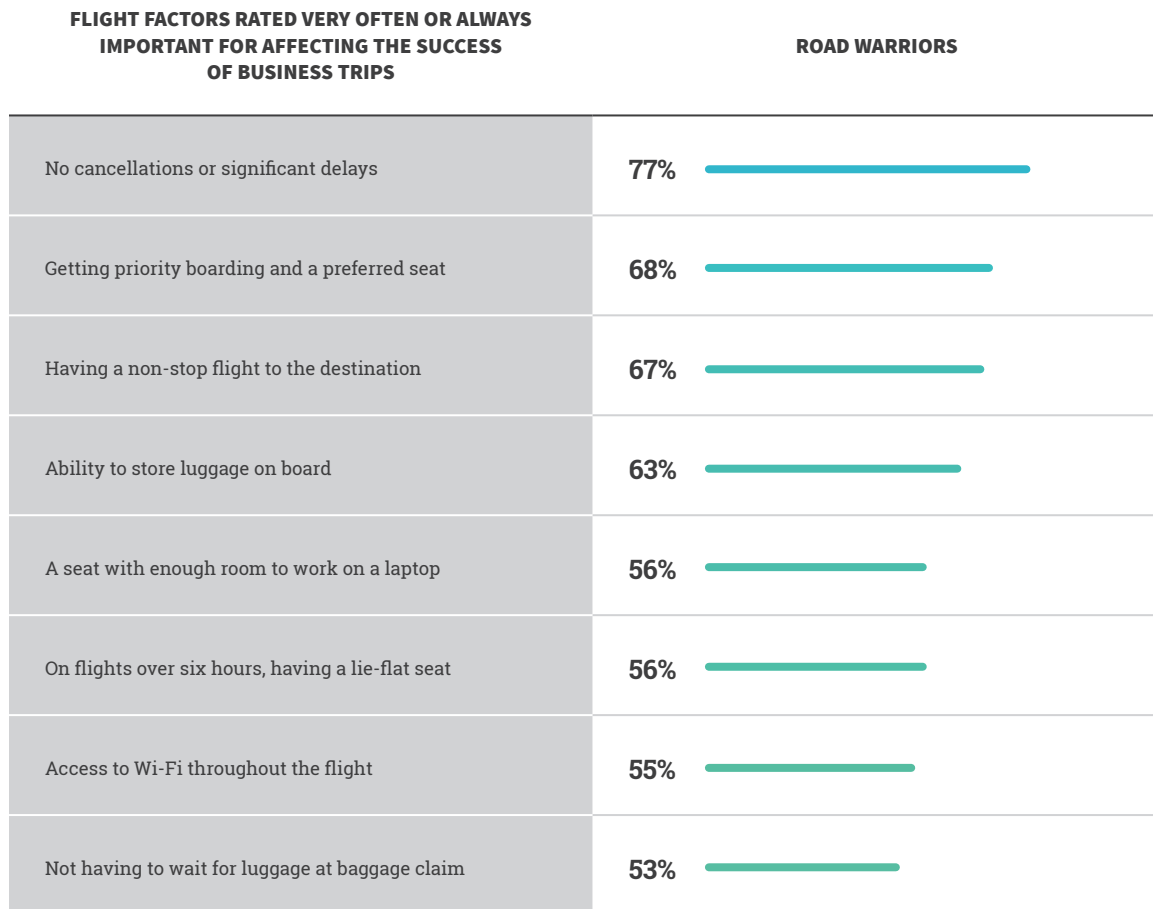
“Yes, companies will reduce their travel expenses by using cost-focused travel policies,” says Gillespie. “But at what greater cost? This study reveals the ‘old-school’ approach to managing travel is detrimental to more important goals, namely achieving successful trips, retaining road warriors and helping them stay healthy and happy.”

Important Success Factors from Flights, Hotels and Airports

Road warriors were asked on a five-point scale how often various aspects of flights, hotels and airports were important for affecting the overall success of their business trips. The percentages below reflect those who rated the factor as very often or always important to business trip success.

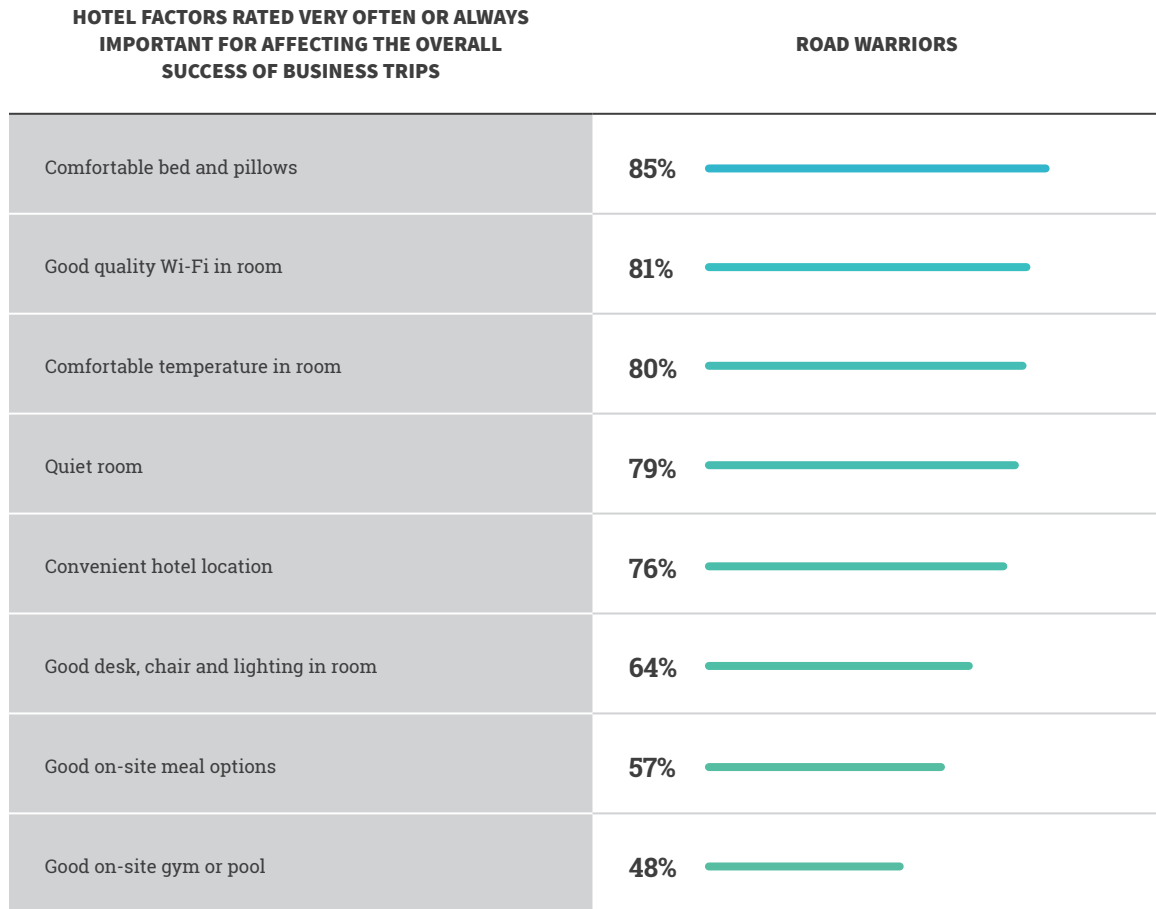
Flight Factors

The most important flight factors are having on-time flights followed by priority boarding, preferred seating and non-stop flights.



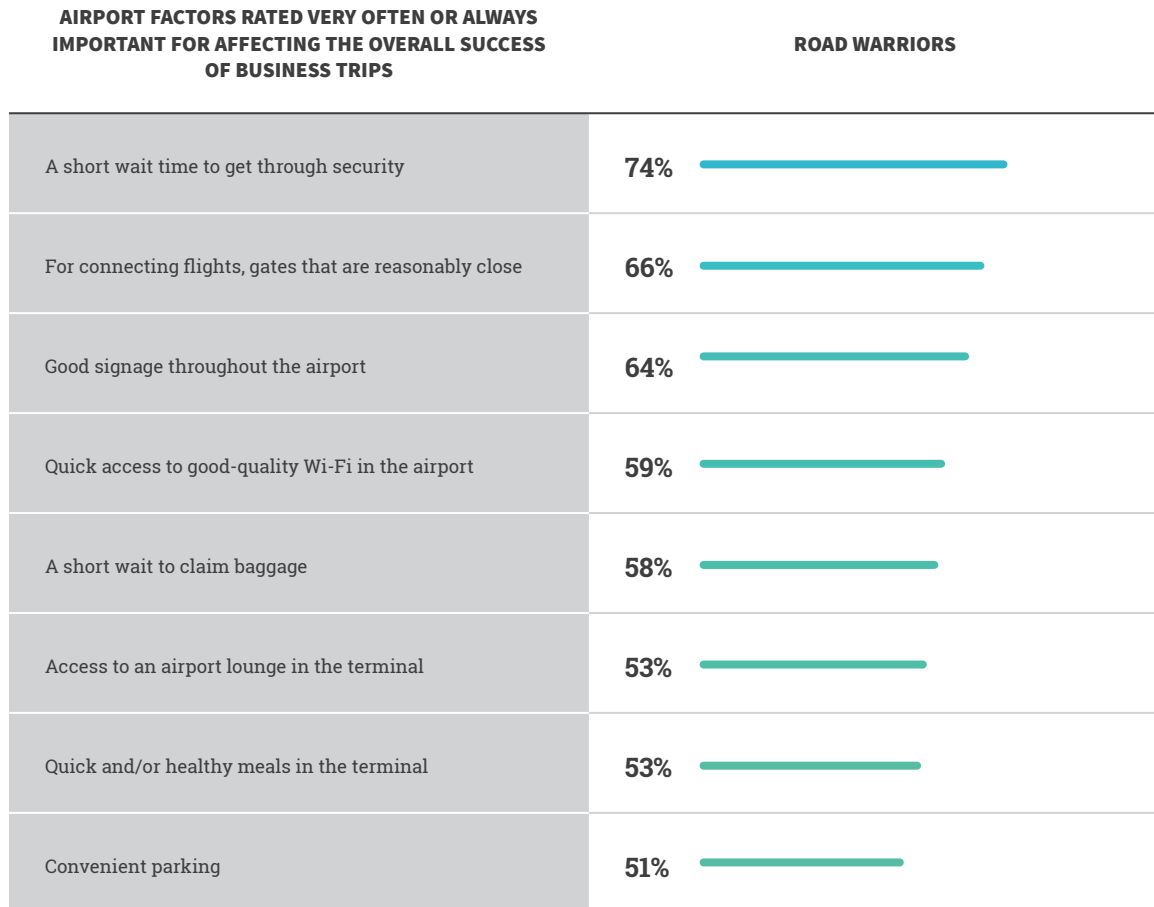
Hotel Factors

When it comes to hotels, road warriors recognize the importance of a room's comfort and its quietness, along with good Wi-Fi as the most important factors. A gym or pool are the least important factors.



Airport Factors

At the airport, the most important factors road warriors link to successful trips are short security lines, reasonably close gates when connecting and good airport signage.



Importance of Traveler Health, Safety and Wellness

Mental Health

Road warriors agree that mental health factors such as stress, anxiety, depression or mental fatigue can make a huge impact on business travel. Over half of road warriors – 59 percent – believe mental health has an important impact on the overall success of business trips.

Road warriors were asked about their frequency of feeling anxiety, uncontrolled worrying, depression and low levels of external engagement using the Generalized Anxiety Disorder 2-item (GAD-2) and Patient Health Questionnaire-2 (PHQ-2) assessments. Each respondent's answers were used to develop an anxiety and depression (A&D) risk score.

Road warriors with high A&D risk scores report nearly half as many worthwhile business trips, twice as much attrition risk and twice as much reluctance to continue traveling as much in two years than those with low-to-average A&D risk scores.

This high-risk group represents 23 percent of the road warriors surveyed and has an average age of 37-years-old, compared to 47-years-old in the low to average risk group. Those with high A&D risk scores are much more likely to be managed under cost-focused travel policies, have negative effects from jet lag, drink more alcohol and exercise less on the road, and are far more likely to get afraid during their business trips than their low to average risk counterparts.

BUSINESS TRAVEL OUTCOME	ROAD WARRIORS WITH HIGH A&D RISK SCORES	ROAD WARRIORS WITH LOW TO AVERAGE A&D RISK SCORES
Percentage of business trips rated worthwhile	39%	75%
Two-year attrition risk	37%	17%
Wanting to travel much less in two years	76%	34%

Sleep Matters

One in four road warriors (26 percent) sleep poorly on the road. This group reports a higher two-year attrition risk (27 percent versus 19 percent who sleep fairly well on the road), less desire to travel as much in two years and twice the prevalence of being burned out on travel (29 percent versus 14 percent). Perhaps not surprisingly, this sleep-deprived group reports much higher incidences of negative impacts on their physical, mental and emotional health.

Sixty-eight percent of all road warriors agree that sleep quality just before and during a business trip is important to a trip's success. In fact, 51 percent of road warriors assert that getting better sleep while traveling would help them achieve more success on their work trips. The next two most important factors for producing more successful trips are business class seating on flights longer than six hours and having healthier meals and more exercise while traveling.

Jet Lag

Jet lag significantly or extremely affects a quarter of road warriors. This group reports significantly lower rates of worthwhile trips (51 percent versus 71 percent), much higher attrition risk (33 percent versus 20 percent) and is much more likely to want much less travel in two years (68 percent versus 39 percent).

BUSINESS TRAVEL OUTCOME	ROAD WARRIORS SIGNIFICANTLY AFFECTED BY JET LAG	NO OR LOW JET LAG IMPACT
Trips rated worthwhile	51%	71%
Two-year attrition risk	33%	20%
Wanting to travel much less in two years	68%	39%

Travel Anxieties

There is also the negative impact of fear, harassment and bullying. One-third of road warriors get afraid during some of their work trips. Younger travelers are much more likely than their older counterparts to report feeling fear on some business trips – 45 percent of those aged 24 to 44, compared to 10 percent of those aged between 45 and 64.

Meanwhile, 13 percent of road warriors report having felt bullied or sexually harassed on a business trip. Similar to the findings about feeling afraid, younger travelers have been impacted by this more than older ones – 19 percent of road warriors aged 24 to 44 report experiencing this, compared to only six percent of those aged 45 to 64.

Wellness Programs

Given the challenges to health and wellness faced by road warriors, it's understandable that these travelers express high levels of interest in a variety of wellness programs. About two-thirds of all road warriors are interested in taking part in company-sponsored physical wellness or road warrior wellness programs. Half express interest in taking part in an emotional health program and 41 percent in a family counseling program. Younger road warriors are significantly more open to all of these programs than their older counterparts.

INTERESTED IN JOINING COMPANY-SPONSORED PROGRAMS	ROAD WARRIORS AGED 24-44	ROAD WARRIORS AGED 45-64
Physical wellness program	80%	55%
Road warrior wellness program	76%	53%
Emotional health program	69%	28%
Family counseling program	63%	14%

Interestingly, significantly fewer road warriors who are traveling more than 85 nights per year are interested in any of these programs.

INTEREST IN JOINING COMPANY-SPONSORED PROGRAM	ROAD WARRIORS AWAY 35-50 NIGHTS	ROAD WARRIORS AWAY 51-85 NIGHTS	ROAD WARRIORS AWAY 86 OR MORE NIGHTS
Self-reported two-year attrition risk	71%	74%	56%
Trips rated worthwhile	66%	73%	56%
Travelers who desire much less travel in two years	57%	52%	36%
Travelers now or are nearly burned out on travel	45%	42%	31%

As over half of the road warriors traveling 86 nights or more per year are aged 45 to 64, the lower levels of interest among the most frequent travelers could indicate that they have learned through time and experience how to handle the stresses and challenges of the road. Those closer to the start of their careers as frequent travelers express more need of assistance from their employers on how to balance their travel requirements with their physical and emotional health.

CONCLUSION AND RELATED RESEARCH

Road warriors are among an organization’s most valuable resources, and the opportunity exists for senior management to significantly improve the value generated by these employees through an enhanced travel policy. Companies should redesign their approach to managing travel by prioritizing goals related to trip success, road warrior retention, wellness and safety. “Yes, some of these new things will cost more, but the benefits far outweigh those costs,” says Gillespie. “Every company should want more successful trips and, unless they have access to a deep and cheap labor pool, they must prioritize road warrior retention.” In today’s competitive market, it’s critical that leadership listens to what road warriors say is important to their success and tailor their programs to the traveler’s needs.

ROAD WARRIOR ADVICE

FOR MORE TRIP SUCCESS	FOR BETTER RETENTION	FOR MORE WILLINGNESS TO TRAVEL
Getting better sleep before and during trips	Business class seating on flights over 6 hours	More comfortable travel
Getting or keeping business class seating on flights over 6 hours	Less personal time needed for business trips	More rewards and recognition from airlines and hotels
Having more exercise and/or healthier meals while traveling	Higher quality or more convenient hotels	A healthier lifestyle while traveling

By reducing traveler friction and valuing road warrior productivity, health and comfort, firms will be able to significantly enhance trip success rates, increase road warrior retention and achieve better business results. Ultimately, business travel is about business, not travel, and corporate travel programs should be designed accordingly.

Additional Resources:

[Traveler Friction: Insights from U.S. Road Warriors \(2016\)](#)

[Traveler Friction: Insights from U.S. Road Warriors \(2017 Supplement\)](#)

[Traveler Friction on Gillespie’s Guide to Travel + Procurement](#)

[Travel Policy Impact Model](#)

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