**Toolkit 1: Campaign & Insights Pack**

**Asset (b): Insights pack**

**Introduction**

In asset (b) (this document), you’ll find the following:

* A recap of the global narrative
* Background on the research
* A snapshot of our findings
* An overview of the content you’ll receive
* Country and regional narratives of the data
  + *Your local raw data will be attached separately as (appendix a)*

**Our global narrative**

**A reminder of our narrative**

The ‘Headspace’ element of the campaign evolved from a desire to explore how travellers feel about their journeys, with a particular spotlight on any journeys involving the airport and the associated experience. Collinson wants a narrative that will help it better and more credibly engage with its key partners and stakeholders.

Wellbeing/Wellness is a big focus both inside and outside of work – and has found its way onto the C-level agenda. But we questioned how well this was being considered by both travel providers and employers of business travellers. In addition, with an increasing focus on the commercialisation of the travel and airport journey, we questioned how innovation and advancement (or lack of) was impacting the overall traveller experience and the impact on traveller wellbeing.

We felt this was an exciting space for Collinson to explore, giving it a credible and influential voice on the travel and airport journey and experience. With the right standpoint, Collinson can continue to credibly advise and partner with new and existing brands within the financial services and travel industries.

**Research background**

Golin worked with research partner Censuswide on the survey, with a sample of 17,285 leisure travellers and 9,246 business travellers in the UK, US, China, Brazil, Japan, South Korea, Australia, KSA, UAE, Singapore and India between 25.11.2019 - 18.12.2019.

Exact breakdowns of numbers for each market can be found in the country sections.

**What we’ve found**

Most people still get excited about the possibilities that travel holds. People travel because they want to enrich their lives – to nurture relationships, to learn about the world, to shift their perspective, and to open up their minds.

And yet, the process of getting from A to B can take its toll. Our global survey showed:

* Nearly half (43%) have felt stressed while travelling, and nearly a quarter (21%) have felt panicked or scared – 29% have even felt physically sick. Indeed, 18% of travellers would rather go to the dentist than face travel
* There is also the business impact of travel stress, with 47% of business travellers saying it has affected their productivity at work. And it’s not just employees’ productivity that’s at stake, but also their wellbeing. More than one in three (35%) say business travel is impacting their mental health. Indeed, business travel is so draining that nearly one third (31%) admit to having faked a reason to avoid it.
* People are embracing wellbeing in their private lives, but not while they’re travelling. When asked what they do to de-stress at the airport, travellers’ responses show a rather half-hearted approach. The most common measure, favoured by 70%, is simply “arriving early”. Meanwhile, when asked how often they turned to more alternative methods of stress relief, these are some of the least-favoured activities for travellers: only 22% practice mindfulness; 16% use massage and spa treatments; and as little as 15% do yoga.
* However, the struggle to achieve travel wellbeing is not for lack of interest. Indeed, our survey shows a stronger appetite for it than ever. In particular, 87% say their physical health is more important to them while travelling than it was five years ago, and 84% say they are also prioritising their mental health more.

**Our narrative**

Traditionally, vacations have been an opportunity to ‘get away from it all’: to carve out some space to unplug, relax, and unwind. While there is certainly still work to be done, there is already greater potential than there has ever been to relax, unwind, and find peace-of-mind on the journey. Airport lounges are available in more locations than ever, offering indulgent services such as spas, massage centres and sleeping pods. Premium services including ‘fast passes’ and ‘priority boarding’ are helping travellers navigate their journey with efficiency, while add-ons such as ‘food delivery to gate’ and extra legroom can be selected to add a little extra comfort in-flight.

There may be more options available than ever, but there still aren’t nearly enough. Or rather, travellers aren’t currently deriving the benefits from them that they would like. And yet, these findings must be viewed as an opportunity for the industry to build a better travel experience, and in the process deliver greater value to their customers.

Travellers are more stressed than they have ever been, and they are telling us it’s only getting worse. And yet, thanks to the possibility of technology, and the tenacity of the industry, there has never been greater potential for travellers to enjoy a journey that’s efficient, comfortable and stress-free. In other words, a journey they can love.

**The content you’ll receive**

We will be sharing two subsequent toolkits. In them, you will receive the following key content:

* **Press releases:** The findings have been broken down into two press releases, one for consumer press, and one for business travel press.
  + **Consumer press release:** Looks at the unprecedented impact of leisure travel, in terms of mental, emotional and physical health.
  + **Business press release:** looks at the hidden cost travel stress has for businesses, in particular concerning productivity, absenteeism, and employee wellbeing.
* **Client Comms PowerPoint & Infographic:** An overview of the campaign for your key clients. Walking them through the campaign story, rationale, key findings and top-tips.
* **Byline:** The byline will focus on the hidden, unexpected cost of business travel: stress-related productivity loss and employee absenteeism. This content will be delivered in Toolkit 3 and Christopher Evans will be the global spokesperson.
* **eBook:** A more detailed overview of the research findings, looking at the story from a global viewpoint, but also breaking down and comparing the research between different regions.

**Regional Data Narratives**

As you explore your regional data summaries and deep-dive into the raw data, we hope you can see the opportunity to build further on the central mandated global narratives and activity. Giving you the opportunity to produce regional content and activity that helps your region to deliver against its specific commercial goals. Below we’ve pulled out what we think is helpful information for your region, with a comparison against the global result.

**Americas region**

**Americas narrative:** The Americas region – which consists of Brazil and the US – is united in the extent of travel stress it is experiencing. The US reports the highest level of travel stress of any nation surveyed, and Brazil isn’t far behind.

Where the two diverge, however, is in their valuation of wellbeing. Of all nations surveyed, Brazil ranks wellbeing the highest in terms of its importance to the overall travel experience. The US, on the other hand, ranks it among the lowest.

These two different attitudes are reflected in the way both countries address their stress. For Brazil, this attitude seems to be paying off – only 24% say travel is getting more stressful, which is slightly below the global average of 27%. For the US, 47% say travel is more stressful than it was five years ago – which is almost double the global average.

**Brazil – sample size 1,273** *(1,177 leisure travellers and 696 business travellers)*

**Narrative:** Brazilian travellers are experiencing travel stress, just like those in other countries. Nearly half (45%) of them have felt stressed while travelling, which is slightly above the global average of 43%. What sets Brazil apart, however, is that wellbeing and comfort are prized especially highly there, with Brazilian travellers rating both of these qualities higher than any country surveyed. Some 85% say comfort is an important aspect of their journey (compared to 74% globally), and 79% said the same about wellness (which is significantly higher than the global average of 54%).

What’s more, a higher percentage of Brazilian travellers prioritise their wellbeing more than they did five years ago. A vast majority (97%) place more importance on their mental wellbeing, and 96% do the same for their physical wellbeing. Brazilian travellers are also among the most likely to take a day off after travel. Quite a large percentage (75%) plan a day off work following their return (compared to 66% globally), and 55% have phoned in sick (compared to 45% globally). Although this surely helps travellers recuperate, it must be noted it surely has a negative impact for their employers. In either case, Brazil’s focus on wellbeing seems to be paying off – only 24% of travellers say that travel is getting more stressful, which is slightly below the global average of 27%.

The survey also suggests that Brazilians see the journey as an opportunity relax and enjoy themselves, more than any other nation surveyed. When it comes to combatting stress at the airport, the most popular measures are the same as what came out of the global findings: “arriving early” (81%, compared to 70%) and “finding a quiet place to sit” (81%, compared to 60%). However, Brazilian travellers were the most likely to pursue several other activities: eating a meal (54%, compared to 44%); reading (59%, compared to 42%); listening to podcasts or music (77%, compared to 55%); and phoning family and friends (80%, compared to 54%). Brazilian travellers are also the most likely to pay for more legroom (47% compared to 31%).

**Potential headlines:**

* *Brazilian travellers among the world’s most stressed, new research shows*
* *Brazil prizes travel wellbeing more than any other country, but still among the most stressed*
* *Brazilian travellers most likely to put their wellbeing first, new research shows*

**Findings of note:**

* 22% would rather go to the dentist than travel (compared to 21%)
* 35% say business travel has negatively impacted their mental health (on par with the global average)
* 27% have faked a reason to avoid business travel (compared to 31%)
* 53% say their work prioritises cost cutting over wellbeing (compared to 51%)
* Brazilian travellers are just as likely to turn to more holistic techniques to reduce stress at the airport: 17% use massage and spa treatments (compared to 16%), 17% practice mindfulness (compared to 22%), and 11% do yoga (compared to 15%)
* Brazilians experience more stress while travelling (45%, compared to 43% globally)
* Other effects of travel are on-par or slightly less than the global average: 20% have felt physically sick (compared to 29%) and 21% have felt panicked our scared (the same as the global average)
* The physical effects of business travel are slightly less pronounced: 31% have suffered lack of sleep (compared to 39%) and 18% report jetlag (compared to 30%)
* The impact of business travel on productivity is slightly less at 41% (compared to 47%)
* The mental impact of business travel is just as strong, however, with 27% reporting stress as a side effect (compared to 23%)
* Brazilian travellers are more likely to take a day off to recuperate post-travel, with 75% planning leave (compared to 66%) and 55% phoning in sick (compared to 45%)
* In Brazil, travellers are less sceptical of their travel providers and business travel managers. Only 29% say their providers don’t prioritise their mental wellbeing (compared to 42%) and 32% say they don’t prioritise their emotional wellbeing (compared to 44%). Likewise, 27% say their employers don’t prioritise their mental wellbeing (compared to 39%) and only 29% say they don’t prioritise their emotional wellbeing (compared to 27%)
* Brazilian travellers rate the importance of wellbeing especially highly: 79% say it is an important aspect of their journey, compared to 54%
* Comfort is also especially important for Brazilian travellers, with 85% rating it an essential ingredient (compared to 74% globally)
* A higher than average percentage of Brazilian travellers are placing more importance on their wellbeing than they did five years ago, with 96% prioritising their physical wellbeing more (compared to 87%) and 97% prioritising their mental wellbeing more (compared to 84%)
* Brazilian travellers seem to see the journey as an opportunity to relax, more so than any other country surveyed. While their most common measures for reducing stress were in line with the global findings – arriving to the airport early (81%, compared to 70%) and finding a quiet place to sit (81%, compared to 60%) – Brazilian travellers were the most likely to turn to several other past-times: eating a meal (54%, compared to 44%); reading (59%, compared to 42%); listening to podcasts or music (77%, compared to 55%); and phoning family and friends (80%, compared to 54%).
* Brazilian travellers are also the most likely to pay for more legroom, on leisure flights (47%, compared to 31%) and on business flights (47%, compared to 31%)

**US – sample size 2,069** *(1,432 Leisure travellers and 637 business travellers)*

**Narrative:** The ‘Love the Journey’ research has revealed that travellers are more stressed than ever, and no country more so than the US. Globally, 43% of travellers admit feeling stressed, compared to a whopping 66% of American travellers – the highest percentage of any country surveyed. Even more worrisome, 47% say travel is more stressful than it was five years ago – almost double the global average of 24%.

The impact of business travel is just as pronounced, and once again well above the global average. While 35% of global travellers say business travel has a negative impact on their mental health, nearly half (43%) of American business travellers are affected.

Even leisure travel is affecting people’s working lives, with the impact lasting well after the trip is over. American travellers say they need an average of 25 hours to recover from their trip, which is among the highest globally. However, despite the disproportionate effects of travel reported, American travellers are slightly *less* likely to take a day off work to recover than the global average, showing an aversion to taking their wellbeing seriously.

Indeed, American travellers are less likely than other nations to prioritise their wellbeing while travelling. The majority are placing more importance on their physical (79%) and mental (77%) wellbeing) than they did five years ago, but this is still somewhat below the global average. When it comes to the importance of wellbeing as part of the overall travel experience, American travellers are less likely to see it (at 49%, compared to 54%).

**Potential headlines:**

* *American travellers the most stressed in the world, new survey finds*
* *American travellers the most stressed in the world, and less likely to take wellbeing seriously*
* *American travellers most stressed, least likely to take a day off to recover*

**Findings of note:**

* The effects of travel are just as pronounced – 28% of American travellers have felt physically sick (compared to 29%), and 31% have felt panicked or scared (compared to 21%)
* Nearly one third of American business travellers (29%) have faked a reason to avoid business travel (compared to 31%)
* Over half of American business travellers (51%) say travel stress has impacted their productivity (compared to 47%)
* When it comes to combatting stress at the airport, the most popular approach for Americans is “arriving early” (76% compared to 70%), and “finding a quiet place to sit” (58% compared to 60%)
* American travellers are less likely to pursue more holistic measures, like massage and spa treatments (9% compared to 16%) and yoga (11% compared to 15%)
* American travellers are the most stressed globally (66%, compared to 43% globally)
* 27% of American travellers would rather go to the dentist than travel (compared to 21%)
* Travel stress is rising much more notably among Americans – 47% say travel is more stressful than it was five years ago (compared to 24%)
* Business travel is having more of an impact on Americans’ mental health (43%, compared to 35%)
* The most common side effects of business travel are felt much more keenly: lack of sleep (48%, compared to 39%); jetlag (42%, compared to 30%); and stress (38%, compared to 23%)
* American travellers need an average of 25 hours to recover from a trip, which is among the highest of all countries surveyed
* Despite the effects of travel on their wellbeing, American travellers are slightly less likely to take a day off work than the global average: 65% have planned a day off (compared to 66%) and 41% have phoned in sick (compared to 45%)
* American travellers are less likely to see “wellbeing” as an important part of the travel experience (49% compared to 54%)
* American travellers are more likely to see “efficiency” as an important part of the travel experience (53% compared to 49%), which is also clear in their willingness to pay extra for security FastTrack (37% compared to 29%)
* American travellers are more cynical about their travel providers’ interest in their wellbeing, with 51% saying they don’t believe they prioritise their mental wellbeing (compared to 42%), and 53% saying the same of their emotional wellbeing (compared to 44%)
* They are also slightly more cynical about their business travel providers concerns, with 45% saying they don’t believe they prioritise their mental wellbeing (compared to 39%), and 48% saying the same of their emotional wellbeing (compared to 42%)
* While Americans are much less likely than Eastern travellers to turn to a holistic approach to stress management, they are still more likely than other Western countries to use mindfulness (22%, compared to 12% in the UK)

**APAC region**

**APAC narrative:** The APAC region – Australia, China, India, Japan, South Korea and Singapore – is, unsurprisingly, a complex network of countries with several similarities, and many differences. Many APAC countries report a lower than average impact from travel, for example, Japan and South Korea. China reports a lower than average impact from general travel, but a higher than average impact for business travel – although it also has a high valuation for “wellbeing” and a strong enthusiasm for holistic methods of stress reduction.

Singapore and Australia, on the other hand, exhibit characteristics more closely associated with the US and the UK: such as average-high travel stress, low valuation of wellbeing, and a general disdain for more holistic methods of stress reduction. Australia, in particular, is more closely aligned to other western countries, also requiring a longer than average amount of time to bounce back from travel.

Interestingly, all countries were united in their scepticism of their travel providers’ concern for their wellbeing.

**Australia – sample size 1,636** *(1,225 leisure travellers and 411 business travellers)*

**Narrative:** Australia is feeling the effects of travel just as much as any other country, especially when it comes to travellers’ mental health. More than half (54%) feel stressed (compared to 43% globally) and a higher than average percentage (28%) feel panicked or scared (compared to 21%). They also take an especially long time to recover from travel, needing an average of 27 hours – which is among the highest of all nations surveyed.

When it comes to the impact of business travel, the physical effects are especially pronounced for Australian travellers: 48% suffer from a lack of sleep (compared to 39% globally) and 41% experience jetlag (compared to 30%). However, Australian travellers are far less likely to avoid business travel – only 21% have faked a reason to get out of it (compared to 31%). They are also much less likely to take a day off work after travelling: 49% have planned a day off (compared to 66%) and 29% have called in sick (compared to 45%).

Australian travellers are especially cynical of their providers’ concerns for their wellbeing: 55% say they don’t prioritise their emotional needs (compared to 44%); and 56% say the same about their mental health (compared to 42%). The same sentiment applies to their business travel programmes: 51% say their work doesn’t prioritise their emotional needs (compared to 42%); and 51% say the same about their mental health (compared to 39%).

In general, slightly less Australian travellers are taking their wellbeing more seriously than they used to: 78% prioritise their physical wellbeing more (compared to 87%); and 82% prioritise their mental wellbeing more (compared to 84%). And Australian travellers have a lower baseline to start with – only 43% see “wellbeing” as an important part of the travel experience (compared to 54%).

**Potential headlines:**

* *Australians need 27 hours to recover from travel*
* *More than half of Australian travellers say they’re stressed out*
* *29% of Australians would rather sacrifice their Wi-Fi privileges than travel*

**Findings of note:**

* 29% say business travel has an impact on their mental health (compared to 35%)
* 28% say travel is more stressful than it was five years ago (compared to 27%)
* Australian travellers find the best way to combat airport stress is to “arrive early” (72%, compared to 70%)
* Australian travellers are just as unlikely to turn to holistic methods of stress reduction at the airport: 7% use massage and spa treatments (compared to 16%); 14% practice mindfulness (compared to 22%); and 7% do yoga (compared to 15%)
* Australian travellers are feeling the impact of travel quite strongly: 54% feel stressed (compared to 43%); 33% feel physically sick (compared to 29%); and 28% feel panicked or scared (compared to 21%)
* 29% would rather go without Wi-Fi than travel
* Australian travellers take particularly long to recover, needing an average of 27 hours to bounce back
* Australian travellers are also feeling the physical impact of business travel: 48% suffer a lack of sleep (compared to 39%); 41% experience jetlag (compared to 30%); and 23% feel stress (the same as the global average)
* 21% have faked a reason to avoid business travel (compared to 31%)
* And yet, only 49% have planned a day off to recover post-travel (compared to 66%), and only 29% have called in sick (compared to 45%)
* But only 36% of Australian business travellers say travel stress has impacted their productivity (compared to 47%)
* Australian travellers are especially cynical of their providers’ concern for their wellbeing: 55% say they don’t prioritise their emotional needs (compared to 44%); and 56% say the same about their mental health (compared to 42%)
* The same sentiment applies to their business travel programmes: 51% say their work doesn’t prioritise their emotional needs (compared to 42%) and 51% say the same about their mental health (compared to 39%)
* Less Australian travellers are taking their wellbeing more seriously than they used to: 78% prioritise their physical wellbeing more than they used to (compared to 87%); and 82% prioritise their mental wellbeing more than they used to (compared to 84%).
* Less Australian travellers (43%) see “wellbeing” as an important part of the travel experience (compared to 54%)

**China – sample size 2,345** *(1,818 Leisure travellers and 527 business travellers)*

**Narrative:** Chinese travellers are experiencing a slightly lower impact from travel in general: 31% are stressed, (compared to 43% globally); 24% feel physically sick (compared to 29%); and 13% feel panicked or scared (compared to 21%).

However, when it comes to business travel, China is feeling the strain more than any other. Chinese business travellers report the highest impact on their mental health of any nation surveyed, at 47% (compared to 35%). They also report a higher than average effect on their productivity, at 55% (compared to 47%).

This is likely what drives them to fake reasons to get out of business travel much more frequently than average (46%, compared to 31%). Perhaps it is also why they are more likely to resort to absenteeism: 74% have planned a day off work post-travel (compared to 66%); and 58% have simply called in sick (compared to 45%).

And yet, Chinese travellers see the value of their own wellbeing quite clearly. A higher than average percentage take their wellbeing more seriously than they used to: 92% place greater importance on their physical wellbeing (compared to 87%); and 90% prioritise their emotional wellbeing more (compared to 84%). And more Chinese travellers see wellbeing as an important part of the travel experience (60%, compared to 54%).

When it comes to de-stressing at the airport, Chinese travellers are the most likely to turn to holistic measures. While the rest of the world strongly favours “getting to the airport early” as a way to avoid stress, this is less important for Chinese travellers (though 58%, so still the most popular – compared to 70%). Meanwhile, Chinese travellers are much more frequent users of: massage and spa treatments (35%, compared to 16%); mindfulness (36%, compared to 22%); yoga (31%, compared to 15%) herbal medication (24%, compared to 18%); and emotional support animals (32%, compared to 14%).

**Potential headlines:**

* *Travel is so stressful, 17% of Chinese travellers would rather have a falling out with a friend*
* *China’s business travellers most likely to suffer mental health issues*
* *Chinese travellers most likely to turn to holistic measures to beat travel stress*

**Findings of note:**

* Chinese travellers take a similar amount of time to recover, needing an average of 22 hours
* 53% of travellers say their work expects them to prioritise cost cutting over their own wellbeing (compared to 51%)
* Chinese travellers experience a lower general impact of travel: 31% feel stress (compared to 43% globally); 24% feel physically sick (compared to 29%); and 21% feel panicked or scared (compared to 21%)
* Less Chinese say travel stress is getting worse (20%, compared to 27%)
* 17% would rather have a falling out with a friend than travel
* Chinese business travellers report the highest impact on their mental health (47%, compared to 35%)
* A higher than average percentage have faked a reason to avoid business travel (46%, compared to 31%)
* China sees a higher than average level of post-travel absenteeism: 74% have planned a day off (compared to 66%); and 58% have called in sick (compared to 45%)
* China also sees an higher than average impact on productivity as a result of travel stress (55%, compared to 47%)
* However, Chinese business travellers report less frequent effects in other areas: only 17% experience lack of sleep (compared to 39%); 18% suffer jetlag (compared to 30%); and 23% develop stress (compared to 23%)
* Chinese travellers are less cynical about their travel providers: only 20% say they aren’t prioritising their emotional wellbeing (compared to 44%); and 19% say the same about their mental wellbeing (compared to 42%)
* They are also less sceptical of their employer’s concerns: only 18% say they aren’t prioritising their emotional wellbeing (compared to 42%); and 17% say the same about their mental wellbeing (compared to 39%)
* More than average numbers of Chinese travellers are taking their own wellbeing more seriously: 92% are prioritising their physical wellbeing more than they used to (compared to 87%); and 90% are doing the same for their mental wellbeing (compared to 84%)
* Chinese travellers are more likely to see the importance of “wellbeing” as part of the travel experience (60%, compared to 54%)
* “Comfort” is still the most important ingredient of travel, although it was less important than the global average (65%, compared to 74%)
* “Value for money” is less important (46%, compared to 60%), and “efficiency” is rated on-par with the global findings (50%, compared to 49%)
* Although “arriving early” is the most popular way for Chinese travellers to de-stress at the airport, it is still significantly less popular than the global average (58%, compared to 70%)
* On the other hand, Chinese travellers are the highest users of more holistic measures. They are top users of: massage and spa treatments (35%, compared to 16%); mindfulness (36%, compared to 22%); yoga (31%, compared to 15%); herbal medication (24%, compared to 18%); and emotional support animals (32%, compared to 14%)

**India – sample size 7,131** *(4,275 leisure travellers and 2,856 business travellers)*

**Narrative:** Indian travellers are feeling the impact of travel to a slightly lesser extent than most. While 37% feel physically sick (compared to 29%), only 41% feel stressed (compared to 43%) and only 20% feel panicked and scared (compared to 21%).

India recovers from travel much faster than most, needing only an average of 18 hours. They are also among the most likely to take time off following their return – 82% schedule leave (compared to 66%) and 63% call in sick (compared to 45%). Indian travellers are also more likely than average (67%) to see “wellbeing” as an important part of the travel experience (compared to 49%).

On the other hand, Indians who travel for business feel quite a high impact: 39% say their mental health is affected (compared to 35%) and 54% say travel stress impacts their productivity (compared to 47%). Indians are also more likely to fake a reason to avoid business travel (39%, compared to 31%)

Indians are much more likely to see the journey as an opportunity to relax, unwind, and have fun. They are among the most likely to reduce stress using spa and massage treatments (23%, compared to 16%), mindfulness (33%, compared to 22%) and yoga (26%, compared to 15%). They are also the most likely to stream movies and series (58%, compared to 47%), as well as the most likely to visit an airport lounge (50%, compared to 36%). Indian travellers are also more likely to pay to upgrade their experience – in particular they are the most likely to pay for airport lounge access (41%, compared to 32%)

**Potential headlines:**

* *Indian travellers among the quickest to bounce back from travel, but most likely to phone in sick*
* *82% of Indian travellers need to take leave to recover from travel*
* *Indian travellers see the importance of wellbeing, but travel stress still sky-high*

**Findings of note:**

* Indian travellers are just as likely to feel the most common effects of business travel: lack of sleep (39% - the same as the global average); jetlag (25%, compared to 30%); and stress (23% - the same as the global average)
* A similar percentage say travel is more stressful than it was five years ago (28%, compared to 27%)
* Indian travellers are just as cynical of their travel providers – 40% believe they aren’t prioritising their emotional wellbeing (compared to 44%), and 35% believe the same about their mental wellbeing (compared to 42%)
* They are just as sceptical of their business travel managers – 28% believe they aren’t prioritising their emotional wellbeing (compared to 42%); and 33% say the same about their mental wellbeing (compared to 39%)
* Indian travellers are just as likely to prioritise their physical wellbeing more (89%, compared to 87%), as well as their mental wellbeing (86%, compared to 84%)
* When it comes to de-stressing at the airport, Indian travellers have the same top two activities: “arriving early” (70% - the same as the global average); and “finding a quiet place to sit” (60% - the same as the global average)
* Indian travellers feel a slightly lower mental impact, and a slightly higher physical impact – while 37% feel physically sick (compared to 29%), only 41% feel stressed (compared to 43%) and only 20% feel panicked or scared (compared to 21%)
* 21% would rather go to a job interview than travel
* Indian travellers are among the quickest to recover, needing only an average of 18 hours
* Indian travellers are among the most likely to take a day off work to recover from travel – 82% have scheduled leave (compared to 66%) and 63% have phoned in sick (compared to 45%)
* Indian travellers are more likely (67%) to see the value of wellbeing as part of the travel experience (compared to 54%)
* The impact of business travel is slightly above average for Indians, with 39% noticing an impact on their mental health (compared to 35%)
* 39% have faked a reason to avoid business travel (compared to 31%)
* 60% say their work prioritises cost cutting over wellbeing (compared to 51%)
* 54% say travel stress has impacted their productivity (compared to 47%)
* Indian travellers are more likely to de-stress at the airport using massage and spa treatments (23%, compared to 16%); mindfulness (33%, compared to 22%) and yoga (26%, compared to 15%)
* They are also the most likely to stream movies or series (58%, compared to 47%) and the most likely to visit airport lounges (50%, compared to 36%)
* Indian travellers are the most likely to pay for airport lounge access to improve their experience (41%, compared to 32%)
* However, they are also the most likely to find a quiet place to work (47% compared to 34%) and the most likely to take prescribed medication (28%, compared to 18%)

**Japan – sample size 1,774** *(1,038 Leisure travellers and 736 business travellers)*

**Narrative:** Japan is perhaps the biggest outlier of all the nations surveyed. We see much lower than average effects of both general and business travel. Only 21% feel stressed from travel (compared to 43% globally), and only 14% supper a mental impact from business travel (compared to 35%). Japanese travellers are also the least likely to phone in sick after travelling (15%, compared to 45%).

One factor could be that more than average Japanese travellers are prioritising their own wellbeing: 90% take their physical wellbeing more seriously than they used to (compared to 87%); and 87% do the same for the mental wellbeing (compared to 84%).

However, Japanese travellers are much less frequent users of the types of activities other travellers are using to de-stress at the airport. Some 72% are “arriving early” (compared to 70%), but only 28% are connecting to Wi-Fi to phone family and friends (compared to 54%) and only 26% are streaming films and series (compared to 47%). In terms of their most favoured activities, however, visiting airport lounges does rank higher in Japan than most (it is their third most favoured activity at 30%, although this is still below the global average of 36%). Japanese travellers do enjoy a drink at the airport, though! They have the dubious honour of being the country most likely to de-stress using an alcoholic beverage (20%, compared to 16%).

Another striking characteristic is that Japanese travellers are especially doubtful of their providers’ care for their wellbeing. Over half (56%) think their travel provider doesn’t prioritise their emotional wellbeing (compared to 44%); and even more (57%) say the same about their mental wellbeing (compared to 42%). The same pattern is clear in their opinion of their employers: 56% say they don’t take their emotional wellbeing into account (compared to 42%); and 54% say the same about their mental wellbeing (compared to 39%).

**Potential headlines:**

* *Japanese travellers say travel brands don’t care about their wellbeing*
* *87% of Japanese travellers prioritise their mental wellbeing more than they used to*
* *10% of Japanese travellers would rather speak in public than travel, new study shows*

**Findings of note:**

* Japanese travellers take a standard amount of time to recover from travel, needing an average of 22 hours
* Japanese travellers are just as likely to prioritise their wellbeing more than they used to: 90% say their physical wellbeing is more important to them (compared to 87%); and 87% say the same about their mental wellbeing (compared to 84%)
* Looking at the most important ingredients of a good travel experience, Japan ranks the top qualities in the same order (albeit in lower proportions) as the global average: 1. “comfort” (64%, compared to 74%); 2. “Value for money” (41%, compared to 60%); 3. “Wellbeing” (40%, compared to 54%) 4. “Efficiency” (29%, compared to 49%)
* Japan’s favourite way to de-stress at the airport is “arriving on time” (72%, compared to 70%)
* Japanese travellers are experiencing a lower than average impact from travel: only 21% feel stressed (compared to 43%); 15% feel physically sick (compared to 29%); and 2% feel panicked or scared (compared to 21%)
* 10% would rather speak in public than travel
* Slightly less than average say travel has become more stressful compared to five years ago (20%, compared to 27%)
* Only 14% say business travel impacts their mental health (compared to 35%)
* Other side-effect of business travel are slightly more on-par: lack of sleep (35%, compared to 39%); jetlag (30% - the same as the global average); stress (15%, compared to 23%)
* Only 34% say travel stress has impacted their productivity (compared to 47%)
* Slightly less Japanese have faked a reason to avoid travelling for work (20%, compared to 31%)
* Japanese report much lower post-travel absenteeism: 53% have planned a day off (compared to 66%); and only 15% have called in sick (compared to 45%) – the lowest of all countries surveyed
* Japanese travellers are especially cynical about their providers’ care for their wellbeing: 56% say their travel providers don’t prioritise their emotional wellbeing (compared to 44%); and 57% say the same about their mental wellbeing (compared to 42%)
* The same goes for their employers: 56% say their work doesn’t prioritise their emotional wellbeing (compared to 42%); and 54% say the same about their mental wellbeing (compared to 39%)
* However, only 36% say their work expects them to put cost cutting before wellbeing (compared to 51%)
* Japanese travellers are especially unlikely to use holistic measures to address their stress at the airport: only 6% use massage and spa treatments (compared to 16%); only 6% practice mindfulness (compared to 22%); and only 4% do yoga (compared to 15%)
* Japanese travellers are the most likely to indulge in an alcoholic drink at the airport (20%, compared to 16%)

**Singapore – sample size 1,803** *(1,207 leisure travellers and 596 business travellers)*

**Narrative:** When it comes to travel stress, Singapore is feeling the toll just as much as any other country. Some 41% feel stressed from general travel (compared to 43% globally) and 33% feel an impact on their mental health from travelling for work (compared to 35%). Business travel is also having a significant impact on productivity at 49% (compared to 47%). What’s more, Singaporean travellers take quite a long time to recover from travel, needing an average of 24 hours.

Singaporean travellers are also quite sceptical of their providers’ care for their wellbeing: 55% say they aren’t prioritising their emotional needs (compared to 44%) and 54% say the same about their mental needs (compared to 42%). The same sentiment is shared when it comes to their business travel programmes: 52% say their work doesn’t prioritise their emotional needs (compared to 42%); and 50% say the same about their mental needs (compared to 39%).

In general, Singaporean travellers are less likely to see “wellbeing” as an important part of the travel experience (50%, compared to 54%). But interestingly, they are slightly more likely to see the value of “efficiency” (59%, compared to 50%).

**Potential headlines:**

* *23% of Singaporean travellers would rather go without Wi-Fi than travel*
* *Travel stress is impacting productivity for nearly half of Singaporean travellers, survey shows*
* *Singaporean travellers need 24 hours to bounce back post-trip*

**Findings of note:**

* 23% would rather go without Wi-Fi than travel
* Singaporeans take quite a long time to recover from travel, needing an average of 24 hours
* They are quite sceptical about their providers’ concerns for their wellbeing: 55% say they don’t prioritise their emotional needs (compared to 44%); and 54% say the same about their mental needs (compared to 42%)
* Singaporean travellers share the same sentiments about their business travel programmes: 52% their work doesn’t prioritise their emotional wellbeing (compared to 42%); and 50% say the same about their mental needs (compared to 39%)
* When it comes to the most important ingredients of the travel experience, Singaporeans have a slightly different idea than the global average: while the top four are ranked the same, “wellbeing is slightly less important proportionately (50%, compared to 54%), and “efficiency” is slightly more important (59%, compared to 49%)
* Singaporeans experience a significant impact from travel: 41% feel stressed (compared to 43%); 34% feel physically sick (compared to 29%); and 24% feel panicked or scared (compared to 21%)
* 33% feel an impact on their mental health as a result of business travel (compared to 35%)
* The most common side-effects of business travel are: lack of sleep (45%, compared to 39%); jetlag (44%, compared to 30%); and stress (25%, compared to 23%)
* 28% have faked a reason to avoid business travel (compared to 31%)
* 67% have planned a day off post-travel (compared to 66%), and 48% have called in sick (compared to 45%)
* Travel stress has impacted productivity for 47% (compared to 49%)
* 25% of Singaporeans say travel is more stressful than it was five years ago (compared to 27%)
* 51% say work expects them to put cost cutting above wellbeing (the same as the global average)
* 86% prioritise their physical wellbeing more than they used to (compared to 87%), and 83% prioritise their mental wellbeing more (compared to 84%)
* The most popular ways for Singaporeans to de-stress at the airport are: “arriving early” (68%, compared to 70%); and finding a quiet place to sit (53%, compared to 60%)
* Singaporean travellers are just as unlikely to turn to holistic methods of stress reduction: only 12% use massage and spa treatments (compared to 16%); 17% practice mindfulness (compared to 22%); and 9% do yoga

**South Korea – sample size 1,770** *(1,123 leisure travellers and 647 business travellers)*

**Narrative:** South Korean travellers typically experience a lower than average impact of travel. Only 35% feel stress from general travel (compared to 43% globally), and only 19% suffer a mental impact from travelling for work (compared to 35%). However, South Korean travellers are still reporting a physical impact from business travel: 43% suffer a lack of sleep (compared to 39%); and 48% are experiencing jetlag (compared to 30%). They also take quite a long time to recover from travel, needing an average of 26 hours.

South Korea is taking its wellbeing more seriously when travelling than it used to: 86% care more about their physical wellbeing (compared to 87%); and 94% care more about their mental wellbeing (compared to 84%). That said, the baseline is quite low, with only 37% saying wellbeing is an important part of a good travel experience (compared to 54%).

For South Koreans, the most important aspect of travel is “value for money” (66%, compared to 60%). Maybe they’re saving their money for shopping – South Korean travellers are the most likely to de-stress at the airport using retail therapy (54%, compared to 36%). On the other hand, South Koreans are especially unlikely to use holistic methods to unwind. They are much more infrequent users of massage and spa treatments (10%, compared to 16%); mindfulness (11%, compared to 22%); and yoga (7%, compared to 15%).

**Potential headlines:**

* *27% of Korean travellers would rather go without Wi-Fi than travel*
* *South Korean travellers are the most likely to de-stress at the airport through retail therapy*
* *South Korean travellers need 26 hours to recover from travel*

**Findings of note:**

* 21% of South Korean travellers say travel is more stressful than it was five years ago (compared to 27%)
* 24% have faked a reason to avoid business travel (compared to 31%)
* South Koreans are just as sceptical of their providers’ concern for their wellbeing: 48% say they aren’t prioritising their emotional wellbeing (compared to 44%); and 47% say the same about their mental wellbeing (compared to 42%)
* The same sentiment is shared about their employers: 44% say their work isn’t prioritising their emotional needs (compared to 42%); and 44% say the same about their mental needs (compared to 39%)
* 45% say their work expects them to put cost cutting before their own wellbeing (compared to 51%)
* 87% prioritise their physical wellbeing more than they used to (compared to 87%) and 94% prioritise their mental wellbeing more than they used to (compared to 84%)
* The most popular ways for South Koreans to de-stress at the airport are: “arriving early” (77%, compared to 70%); and “finding a quiet place to sit” (62%, compared to 60%)
* South Koreans report a lower impact from travel: only 35% feel stressed (compared to 43%); 20% feel physically sick (compared to 29%) and 15% feel panicked or scared (compared to 21%)
* 27% would rather go without Wi-Fi than travel
* South Koreans take a rather high time to recover from travel, needing an average of 26 hours
* South Korean business travellers report a lower than average impact on their mental health (19%, compared to 35%)
* 38% say travel stress has impacted their productivity (compared to 47%)
* Post-travel absenteeism is much lower: 54% have planned a day off (compared to 66%) and 30% have called in sick (compared to 45%)
* However the physical impact of business travel is still evident: 43% have experienced lack of sleep (compared to 39%); 48% have suffered jetlag (compared to 30%); and 23% have experienced stress (23% - the same as the global average)
* When it comes to the important ingredients of a good travel experience, South Korean travellers see things differently. Their first priority is “value for money” (66%, compared to 60%), followed by “comfort” (65%, compared to 74%), “efficiency” (46%, compared to 49%) and then “wellbeing” (37%, compared to 54%)
* South Korean travellers are less likely to turn to holistic methods to de-stress at the airport: only 10% use massage and spa treatments (compared to 16%); 11% practice mindfulness (compared to 22%), and 7% do yoga (compared to 15%)
* But South Korean travellers are the most likely to de-stress at the airport using retail therapy (54%, compared to 36%)

**Europe region**

**Europe narrative:** The Europe region – consisting of Russia and the UK – is one of the hardest hit by travel stress. Both the UK and Russia report some of the highest rates of physical and emotional effects. The UK in particular takes the longest of any nation to recover from travel.

Both countries are also united in their low valuation of wellbeing – indeed, Russian travellers are the least likely of all to see its importance to the overall travel experience. Both are also especially unlikely to pursue more holistic methods to reduce their stress at the airport.

**Russia – sample size 2,159** *(1,433 leisure travellers and 726 business travellers)*

**Narrative:** Russia is feeling the strain of travel just as much as any other country, although it tends to suffer stress a little less keenly. While 36% of Russian travellers have felt physically sick (compared to 29% globally) and 23% have felt panicked or scared (compared to 21%), only 39% have felt stressed (compared to 43%). Still, the situation is clearly taking its toll, with 25% of Russian travellers saying they would rather go to the hospital than travel.

The impact of business travel is also on par with global findings, although the non-physical impact is once again less. While 44% have experienced lack of sleep (compared to 39%), only 22% say their mental health has negatively impacted their mental health (compared to 35%), and only 32% say travel stress has affected their productivity (compared to 47%). Furthermore, Russian travellers are much less likely to take a day off work on their return – only 45% have planned leave after a trip (compared to 66%) and only 23% have phoned in sick (compare to 45%).

Although Russian travellers are more or less suffering the same side-effects of travel as their global counterparts, they are much less likely to take their wellbeing seriously. Most Russian travellers (90%) prioritise their physical wellbeing more than they did five years ago (compared to 87%), and 82% do the same for their mental health (compared to 84%). However, Russian travellers are the least likely of all to see the importance of “wellbeing” as part of the overall travel experience (36%, compared to 54%). They are also much less likely to use alternative methods of stress reduction at the airport, for example mindfulness (8%, compared to 22%) and yoga (5%, compared to 15%).

**Potential headlines:**

* *Russian travellers least likely to prioritise wellbeing*
* *Russian travellers prioritise wellbeing more than they used to, but not enough*
* *25% of Russians would rather go to the hospital than travel*

**Findings of note:**

* 27% have faked a reason to avoid travel (compared to 31%)
* Russians take an average of 21 hours to recover from travel
* 22% say travel is more stressful than it was five years ago (compared to 27%)
* 29% believe their travel providers aren’t prioritising their emotional health (compared to 44%), and 45% believe the same about their mental health (compared to 42%)
* 37% believe their employers aren’t prioritising their emotional wellbeing, (compared to 42%) and 42% believe the same about their mental health (compared to 39%)
* Russians feel the physical effects of travel more than the mental/emotional effects – 36% feel physically sick (compared to 29% globally) and 23% feel panicked or scared (compared to 21%), while only 39% feel stressed (compared to 43%)
* 25% would rather go to the hospital than travel
* Russian travellers also feel the physical effects of business travel more than the non-physical effects – 44% suffer lack of sleep (compared to 39%) and 25% experience jetlag (compared to 30%), whereas 22% suffer stress (compared to 23%) and 22% feel an effect on their mental health (compared to 35%)
* Only 32% say travel stress has impacted their productivity (compared to 47%)
* Only 42% of Russian business travellers say their work prioritises cost cutting over their wellbeing (51%)
* Russian travellers are more likely to prioritise their physical wellbeing, but slightly less likely to do the same for their mental wellbeing – 90% take their physical wellbeing more seriously than they used to (compared to 87%), but only 82% prioritise their mental wellbeing more (compared to 84%)
* Russians are the least likely to see the importance of “wellbeing” as part of the overall travel experience (36%, compared to 54%)
* On the other hand, Russians are more likely to see the importance of “comfort” (78%, compared to 74%) and “value for money” (72%, compared to 60%)
* When it comes to reducing stress at the airport, Russians favour the same activities as other travellers, but they pursue them to a lesser extent – “arriving early” is the most popular way to de-stress (59%, compared to 70%), closely following by “finding a quiet place to sit” (50%, compared to 60%)
* Alternative relaxation techniques are even less popular amongst Russian travellers – 6% use massage and spa treatments (compared to 16%), 8% practices mindfulness (Compared to 22%) and 5% yoga (15%)

**UK – sample size 1,687** *(1,275 leisure travellers and 412 business travellers)*

**Narrative:** The UK is more affected than average by travel. The mental effects of travel are especially strongly felt, with 64% experiencing stress (compared to 43% globally) and 31% feeling panicked and scared (compared to 21%). Indeed, British travellers take the longest of any country to recover from travel, needing an average of 28 hours. Even more worryingly, British travellers are more likely than average to say the situation is getting worse – 43% say travel is more stressful than it was five years ago (compared to 27%).

The impact of business travel is also more pronounced, with 45% experiencing a negative impact on their mental health (compared to 35%), and 36% experiencing increased stress (compared to 23%).

Despite the effects they are experiencing, British travellers are much less likely to take a day off work following their return. Only 38% plan leave (compared to 66%), and only 22% phone in sick (compared to 45%). They are also less likely to prioritise their wellbeing while travelling, with only 64% placing more importance on their mental wellbeing (compared to 84%) and only 64% doing the same for their physical wellbeing (compared to 87%). What’s more, British travellers are much less likely than average to see the importance of “wellbeing” as part of the overall travel experience (38%, compared to 54%).

**Potential headlines:**

* *British travellers take the longest to recover from travel, but much less likely to take a day off*
* *British travellers take 28 hours to recover from travel, new survey finds*
* *29% of Brits would rather go to hospital than travel*

**Findings of note:**

* 27% have faked a reason to avoid business travel (compared to 31%)
* Travel stress impacts productivity for 47% of British travellers (compared to 47%)
* 47% say their employer prioritises cost cutting over wellbeing (compared to 51%)
* The most popular ways to de-stress at the airport are: “arriving at the airport early” (72%, compared to 70%); and “finding a quiet place to sit” (58%, compared to 60%)
* British travellers feel the impact of travel especially strongly, particularly the mental strain – 64% feel stressed (compared to 43%), and 31% feel panicked and scared (compared to 21%)
* 29% would rather go to hospital than travel
* The UK takes the longest to recover from travel, at an average of 28 hours
* More British travellers believe things are getting worse, with 43% saying travel is more stressful than it was five years ago (compared to 43%)
* The mental impact of business travel is also heightened in the UK, with 45% saying their mental health has been affected (compared to 35%) and 36% feel stressed (compared to 23%)
* However, the physical effects of business travel are also quite damaging, with 49% suffering lack of sleep (compared to 39%) and 41% experiencing jetlag (compared to 30%)
* Despite the significant impact of travel, British travellers are less likely to take time off following their return – only 38% plan leave (compared to 66%) and only 22% phone in sick (compared to 45%)
* British travellers are especially cynical about the intentions of their travel providers – 67% believe they don’t prioritise their emotional wellbeing (compared to 44%), and 69% say the same about their mental wellbeing (compared to 42%)
* British travellers have the same suspicions of their employers, with 63% believing they don’t prioritise their emotional wellbeing (compared to 42%), and 62% believing the same about their mental wellbeing
* The UK is less likely than average to prioritise their wellbeing, both physical (74%, compared to 87%) and mental (64%, compared to 84%)
* Less British travellers see the importance of wellbeing (38%, compared to 54%)
* British travellers are less likely to use alternative methods to de-stress at the airport – only 5% use massage and spa treatments (compared to 16%); only 12% practice mindfulness (compared to 22%); and 4% do yoga (compared to 15%)

**MEA region**

**MEA narrative:** The MEA region – consisting of the Kingdom of Saudi Arabia and the United Arab Emirates – is perhaps the most consistent region. By and large, it adheres most closely with the global ‘Love the Journey’ narrative: travellers report high stress, but high willingness to embrace more wellbeing in their journey.

Where MEA differs however is that these countries recover much quicker from travel. Also, they are much more likely to take time off work to recuperate from travel if needed. And finally, these countries are among the most enthusiastic users of more holistic stress reduction methods.

**KSA – sample size 1,165** *(630 Leisure travellers and 535 business travellers in the KSA)*

**Narrative:** Like other countries in the Middle East, the Kingdom of Saudi Arabia (KSA) is one of the most in-line with the global narrative. The KSA is experiencing the same physical and mental effects of general travel and business travel alike. Where they differ, however, is that they recover much quicker – KSA travellers only need an average of 18 hours to recover from a trip. They are also much more likely to take time off work to recuperate from travel: 84% have planned leave (compared to 66% globally); and 64% have phoned in sick (compared to 45%).

Furthermore, like the UAE, the KSA is among the most enthusiastic users of more holistic stress reduction methods: 24% use massage and spa treatments (compared to 16%); 33% practice mindfulness (compared to 22%); and 22% practice yoga (compared to 15%).

**Potential headlines:**

* *Travel stress sky-high in KSA, new study finds*
* *Travel stress so high, 84% of Saudi Arabians need time off work to recover*
* *Saudi Arabians among the quickest to bounce back from travel, new survey finds*

**Findings of note:**

* The KSA is experiencing the same effects of travel: 43% are stressed (the same as the global average); 30% are physically sick (compared to 29%); and 19% feel panicked or scared (compared to 21%)
* 22% would rather go to hospital than travel
* Saudi Arabian travellers feel the same impact on their mental health when travelling for business (35% - the same as the global average)
* They feel the same side effects: lack of sleep (37% compared to 39%); jetlag (18%, compared to 30%); stress (17%, compared to 23%)
* 38% have faked a reason to avoid business travel (compared to 31%)
* 48% say travel stress has impacted their productivity (compared to 47%)
* A similar percentage say that travel is more stressful than it was five years ago (21%, compared to 27%)
* Saudi Arabian travellers are just as cynical about their travel providers, with 39% saying they aren’t prioritising their emotional wellbeing (compared to 44%), and 46% saying the same about their mental wellbeing (compared to 42%)
* They are also just as sceptical about their business travel managers, with 45% saying they aren’t prioritising their emotional wellbeing (compared to 42%), and 38% saying the same about their mental wellbeing (compared to 39%)
* 55% say their work prioritises cost cutting over their wellbeing (compared to 51%)
* Saudi Arabian travellers are just as likely to prioritise their wellbeing more than they used to, both physical (80%, compared to 87%) and mental (84% - the same as the global average)
* Saudi Arabian travellers see the same ingredients contributing to a good travel experience: “comfort” (75%, compared to 74%); “value for money” (56%, compared to 60%); “wellbeing” (57%, compared to 54%); and “efficiency” (44%, compared to 49%)
* They also use the same activities most frequently to de-stress at the airport: “arriving early” (70% - the same as the global average); and finding a quiet place to sit (67%, compared to 60%)
* The KSA is among the quickest to bounce back from travel, needing only an average of 18 hours
* Saud Arabian travellers are much more likely to take a day off work to recuperate – 84% have planned leave (compared to 66%), and 64% have phoned in sick (compared to 45%)
* Saudi Arabian travellers are much more likely to turn to more holistic stress remedies, like massage and spa treatments (24%, compared to 16%); mindfulness (33%, compared to 22%); and yoga (22%, compared to 15%)

**UAE – sample size 1,118** *(651 Leisure travellers and 467 business travellers)*

**Narrative:** Like other countries in the Middle East, the United Arab Emirates (UAE) is one of the most in-line with the global narrative. The UAE is experiencing the same physical and mental effects of business and leisure travel alike. Where they differ, however, is that like the KSA, they are much more likely to take time off work to recuperate from travel: 79% have planned leave (compared to 66% globally), and 60% have phoned in sick (compared to 45%).

Furthermore, like the KSA, the UAE is also slightly more likely to use holistic stress reduction methods: 19% use massage and spa treatments (compared to 16%); 24% practice mindfulness (compared to 22%); and 16% turn to yoga (compared to 15%). They are also slightly more likely to upgrade experiences: the most popular are airport lounge access (46%, compared to 32%) and extra leg room on the plane (32%, compared to 31%).

**Potential headlines:**

* *Travel stress sky-high in UAE, new study finds*
* *Travel stress so high, 79% of Emiratis need time off work to recover*
* *Emirati travellers see the importance of wellbeing, but travel stress still sky-high*

**Findings of note:**

* The UAE is experiencing the same effects of travel: 40% are stressed (compared to 43%); 32% are physically sick (compared to 29%); and 21% (the same as the global average) feel panicked or scared
* 22% would rather go to hospital than travel
* Emirati travellers need an average of 21 hours to recover from travel
* Emirati travellers feel the same impact on their mental health when travelling for business (31%, compared to 35%)
* They feel the same side effects: lack of sleep (42% compared to 39%); jetlag (29%, compared to 30%); stress (21%, compared to 23%)
* 31% have faked a reason to avoid business travel (the same as the global average)
* 52% say travel stress has impacted their productivity (compared to 47%)
* A similar percentage say that travel is more stressful than it was five years ago (21%, compared to 27%)
* Emirati travellers are just as cynical about their travel providers, with 46% saying they aren’t prioritising their emotional wellbeing (compared to 44%), and 39% saying the same about their mental wellbeing (compared to 42%)
* They are also just as sceptical about their business travel programmes, with 45% saying their work isn’t prioritising their emotional wellbeing (compared to 42%), and 37% saying the same about their mental wellbeing (compared to 39%)
* 57% say their work prioritises cost cutting over their wellbeing (compared to 51%)
* Emirati travellers are just as likely to prioritise their wellbeing more than they used to, both physical (87% - the same as the global average) and mental (84% - the same as the global average)
* Emirati travellers see the same ingredients contributing to a good travel experience: “comfort” (78%, compared to 74%); “value for money” (67%, compared to 60%); “wellbeing” (57%, compared to 54%); and “efficiency” (47%, compared to 49%)
* They also use the same activities most frequently to de-stress at the airport: “arriving early” (71%, compared to 70%); and “finding a quiet place to sit” (64%, compared to 60%)
* Emirati travellers are much more likely to take a day off work to recuperate – 79% have planned leave (compared to 66%), and 60% have phoned in sick (compared to 45%)
* Emirati travellers are much more likely to turn to more holistic stress remedies, like massage and spa treatments (19%, compared to 16%); mindfulness (24%, compared to 22%) and yoga (16%, compared to 15%)
* Emiratis are the most likely to connect to Wi-Fi to get work done (59%, compared to 42%)