

Trip Friction™ and the Traveler Experience



tClara[?]
Travel Data Made Brighter
A Gillespie+Diio Venture

Recruiting and Retention Problems



Companies spend about the **same** on **travel** as they do on **turnover: 1-2%** of revenues¹

The use of **sign-on bonuses** is at an **all-time high**²

- 1) "Retention of Key Talent and the Role of Rewards", Scott, Hay Group, June 2012. tClara analysis
- 2) WorldatWork's ["Survey of Bonus Programs and Practices 2014"](#)

Traveler Burnout Problems

U.S. business travelers
avoided taking 2.7 trips
on average last year due
to the hassle of air travel¹



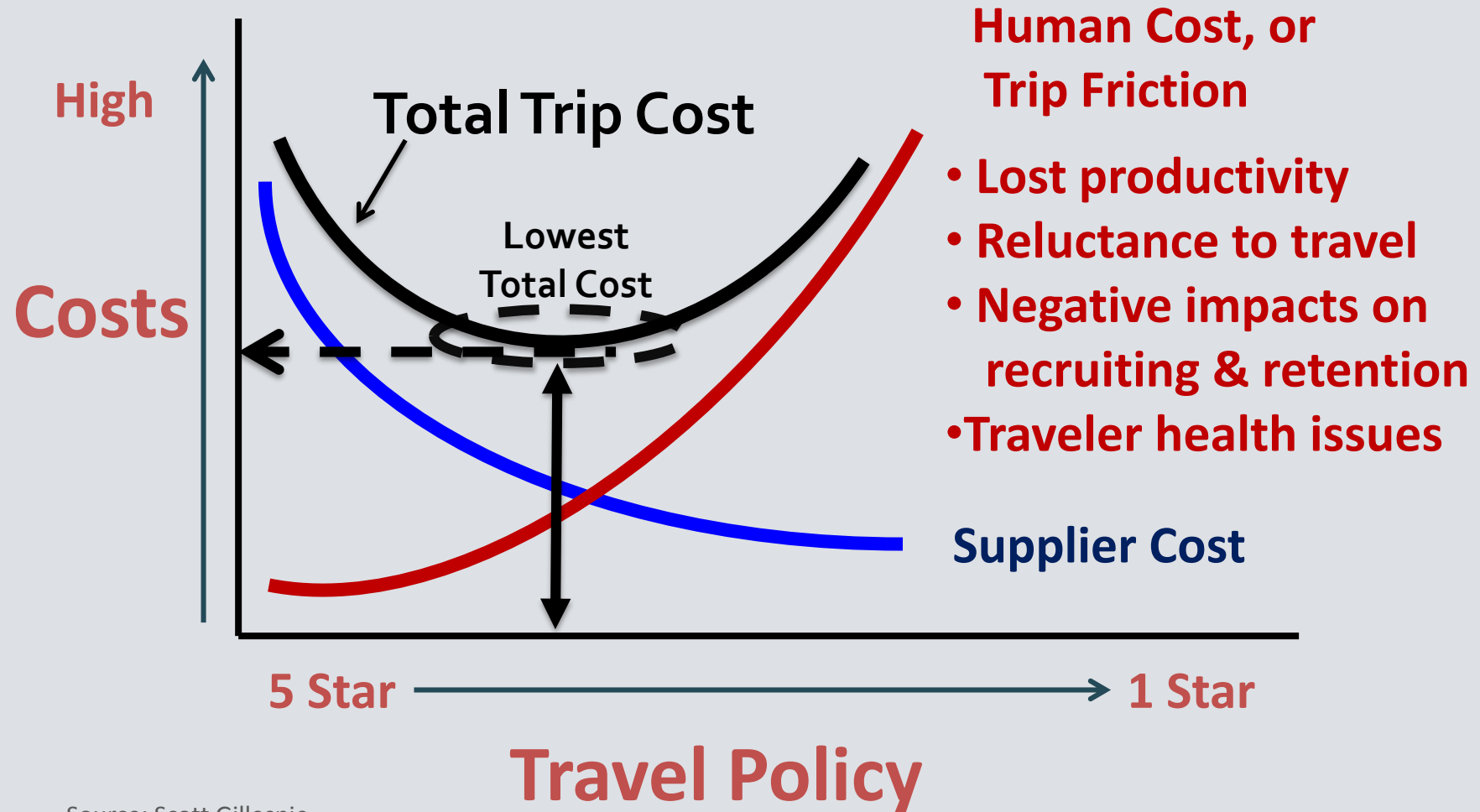
International travelers
submit **80% more**
health claims than
non-travelers²

- 1) U.S. Travel Association survey, June 2014
- 2) Occupational and Environmental Medicine, May 2002

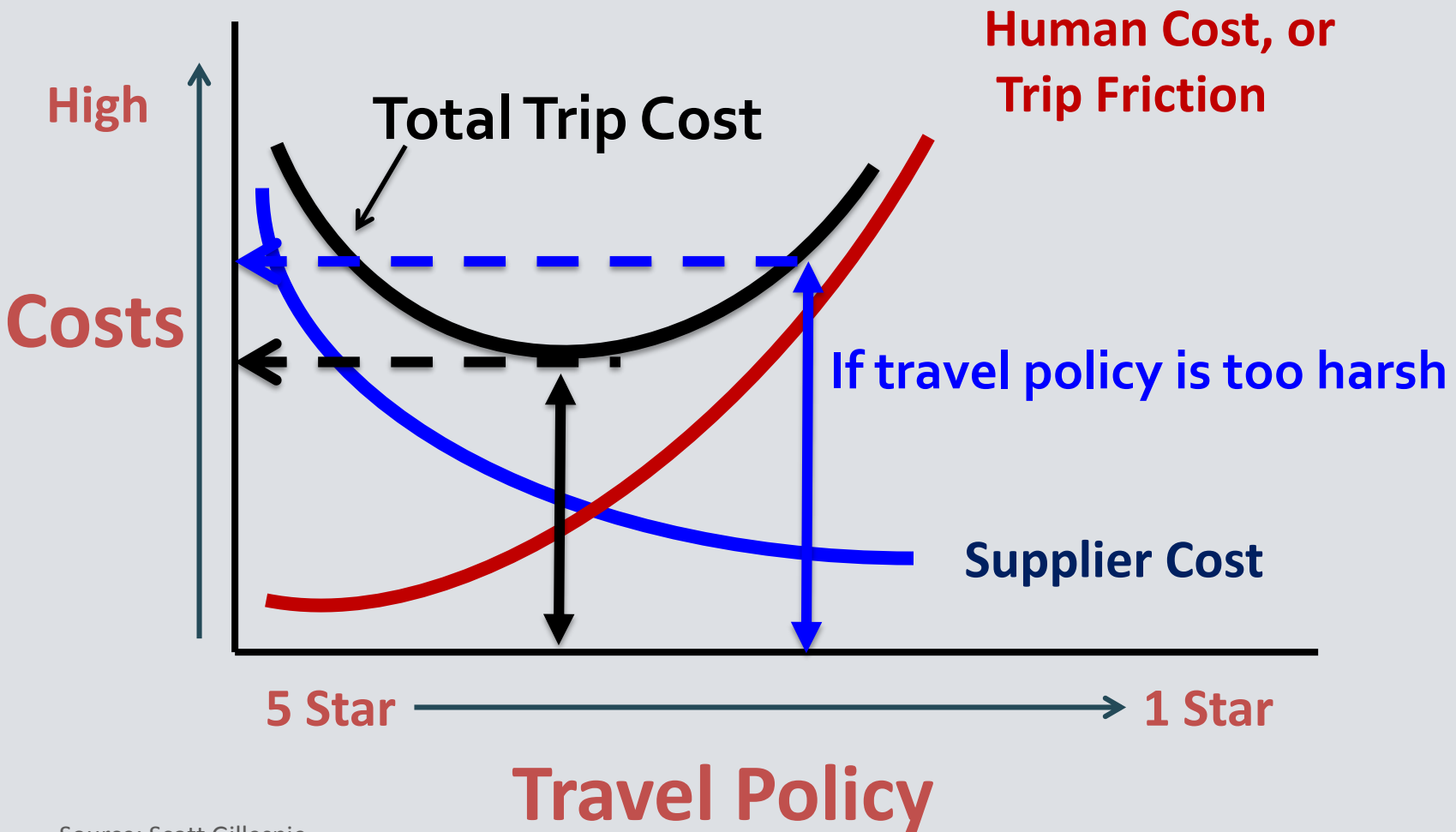
**How do you
get the right
balance
between
cost and
comfort?**



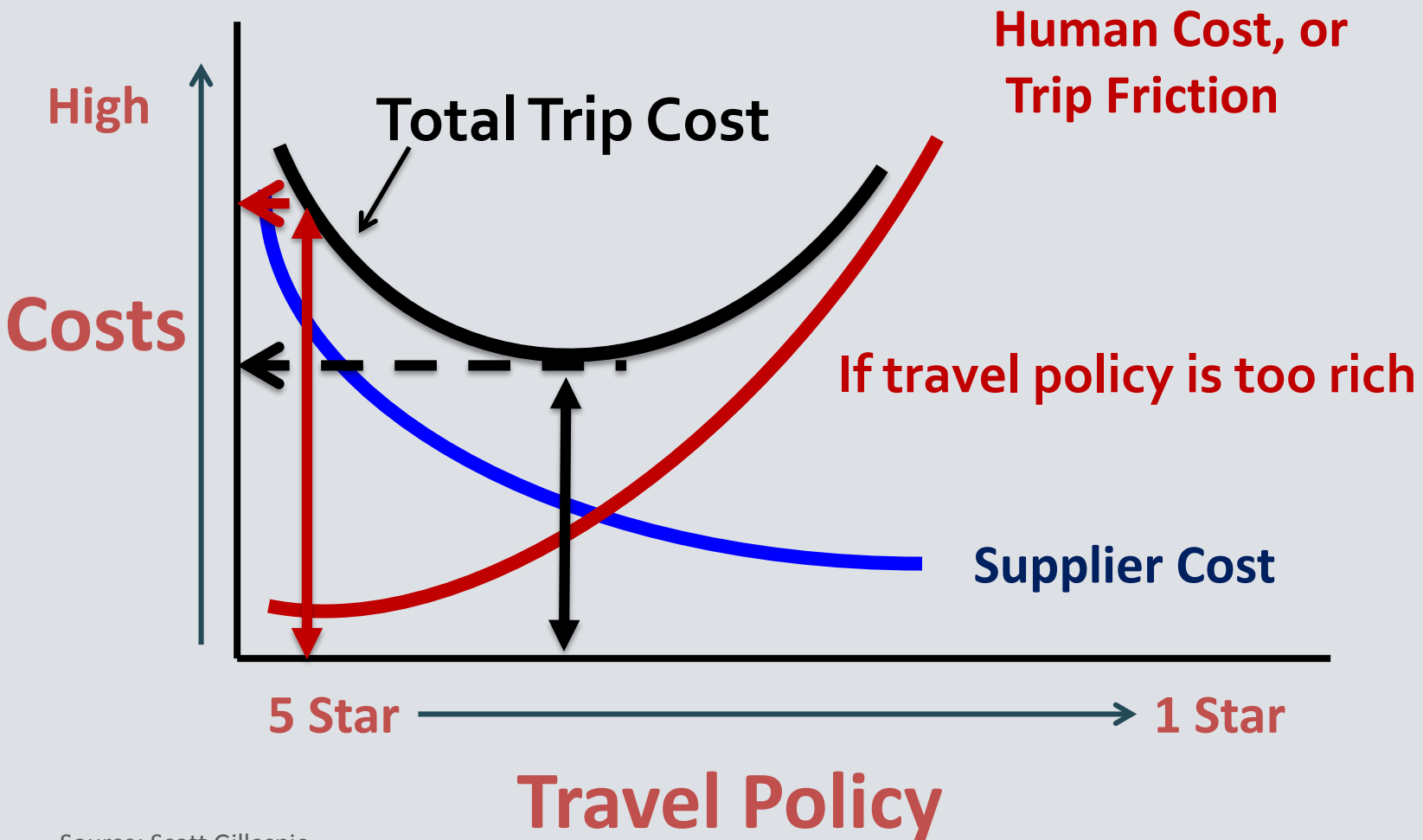
The Total Trip Cost Is What Matters



The Cost of Being Wrong



The Cost of Being Wrong



Trip Friction™ Metrics and Findings



tClara measures traveler wear and tear with Trip Friction™ points



1,000
Points

Trip A

6-hour non-stop in Business Class, arriving home on Friday afternoon, after 2 nights away

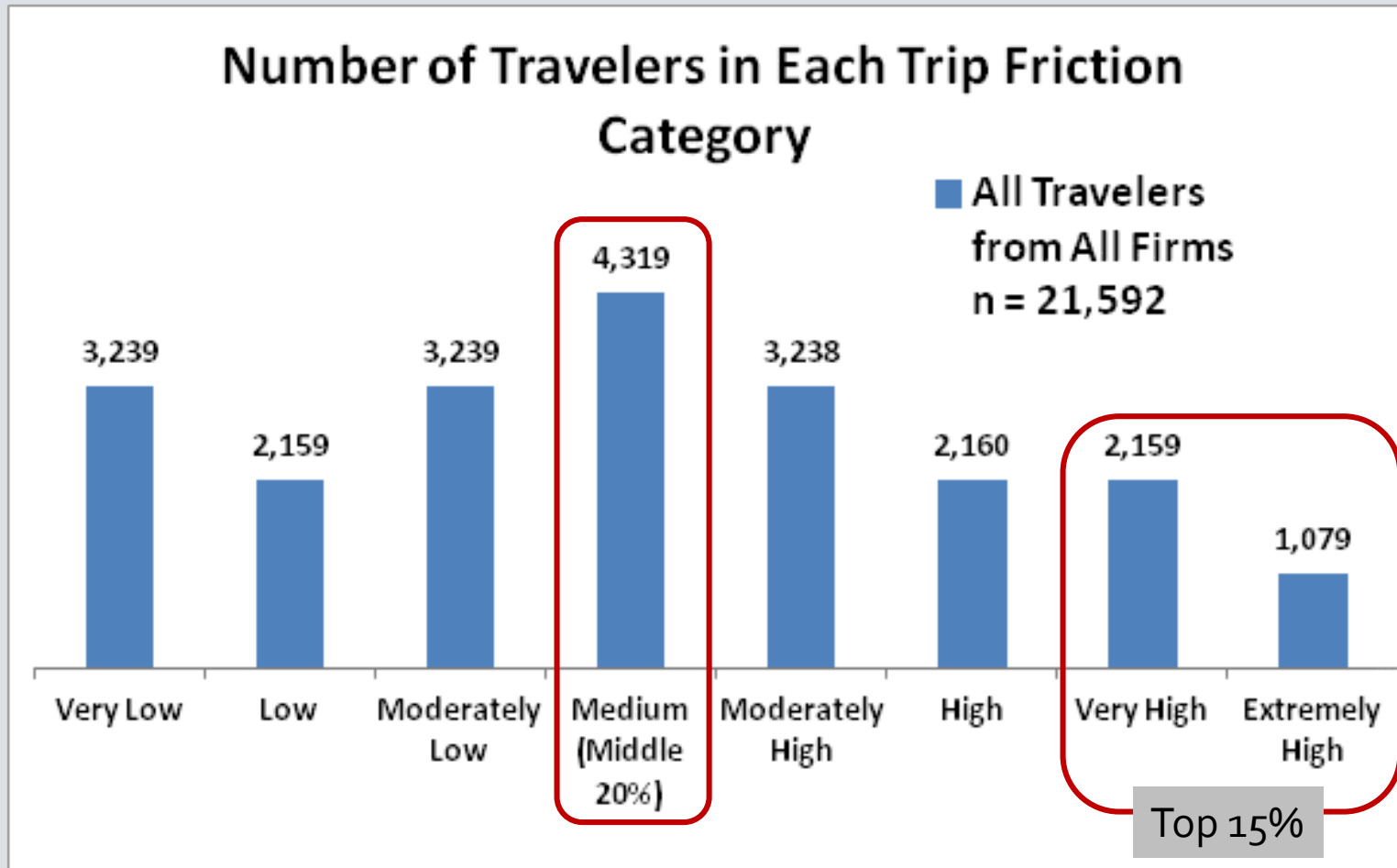


300
Trip Friction
Points

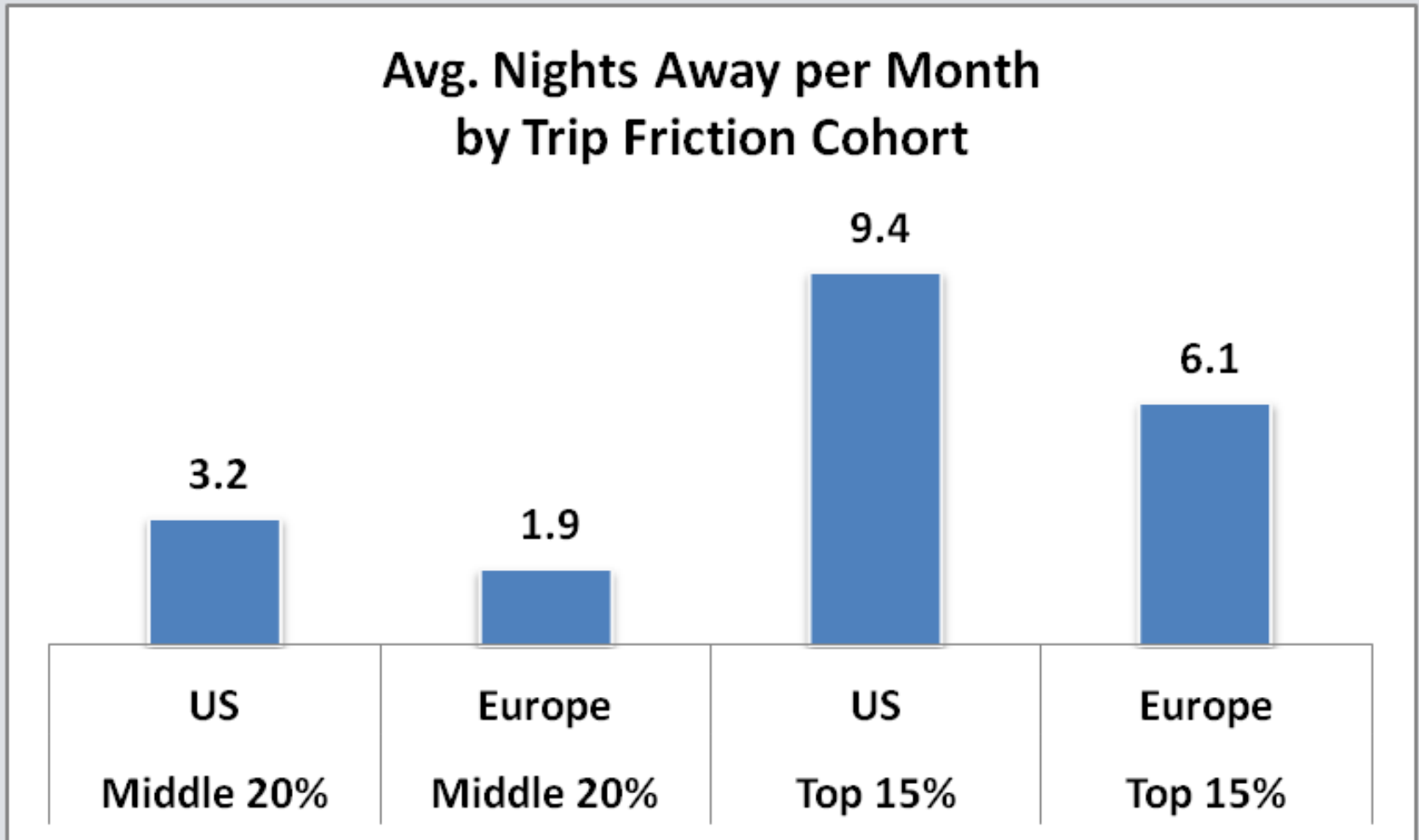
Trip B

6-hour **red-eye** flight, with a **4-hour layover**, connecting on a **regional jet**, both legs **in Coach**, arriving home on **Saturday afternoon**, after **5** nights away

Benchmark data for ~60,000 travelers

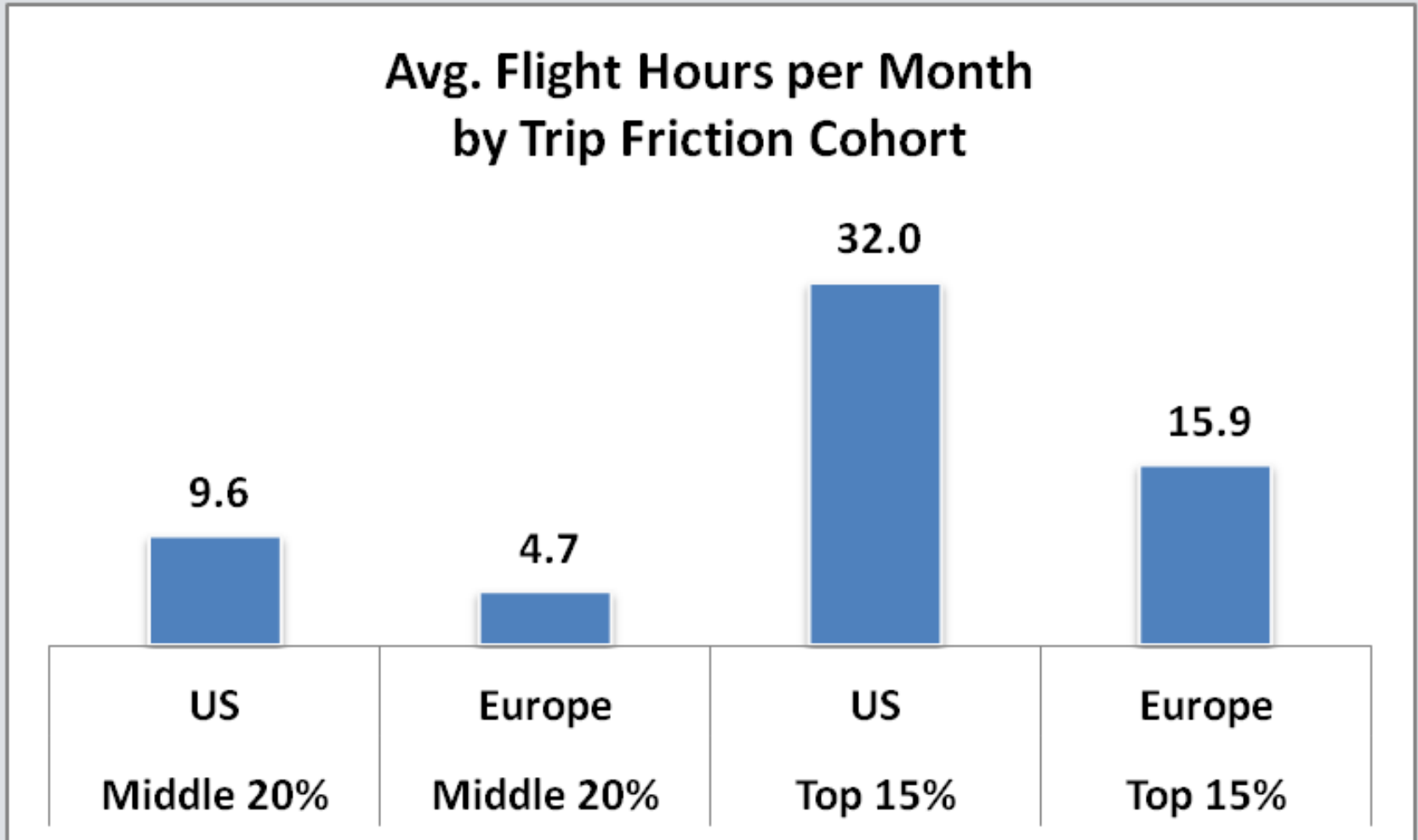


Trip Friction™ Benchmark Findings



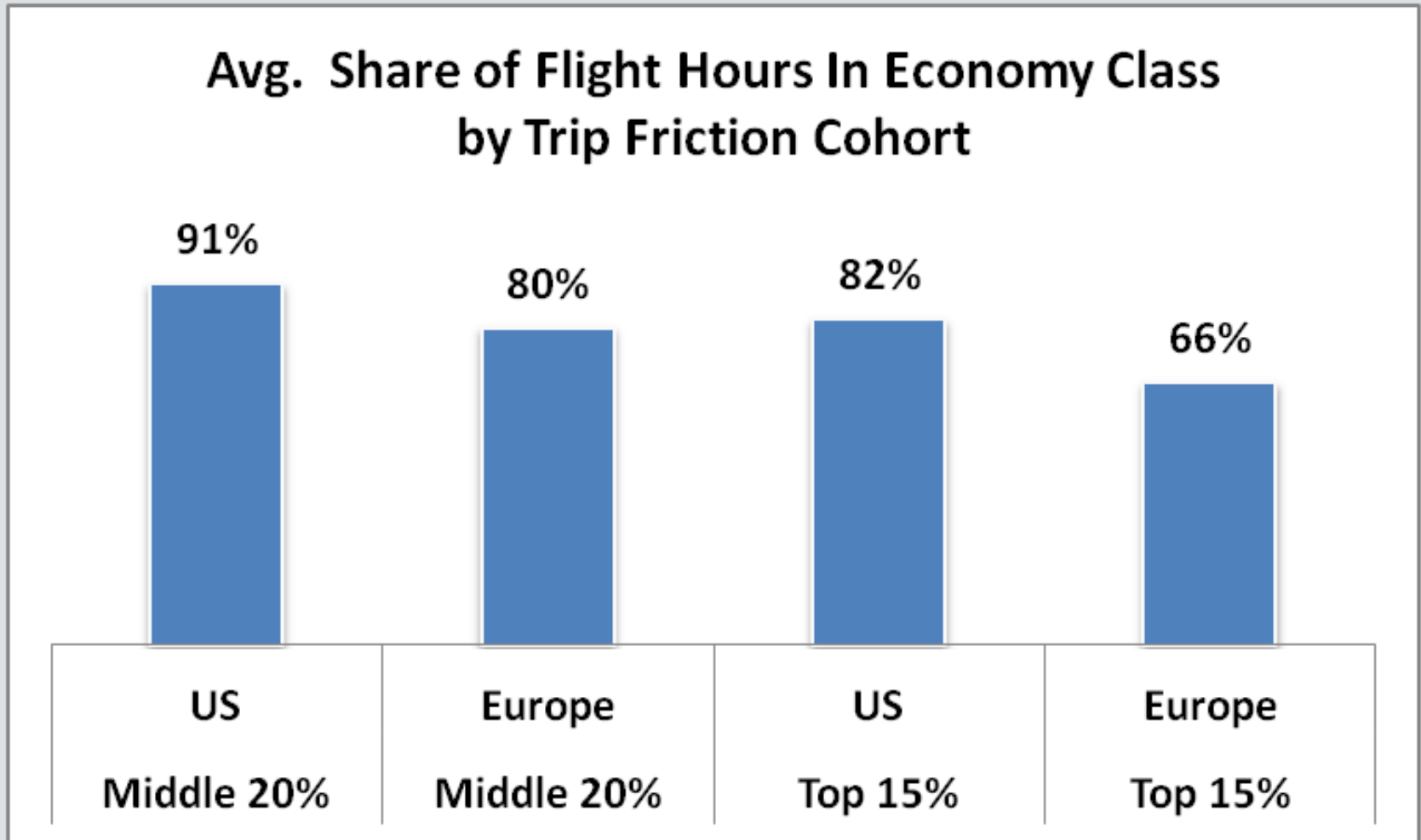
Source: tClara LLC

Trip Friction™ Benchmark Findings



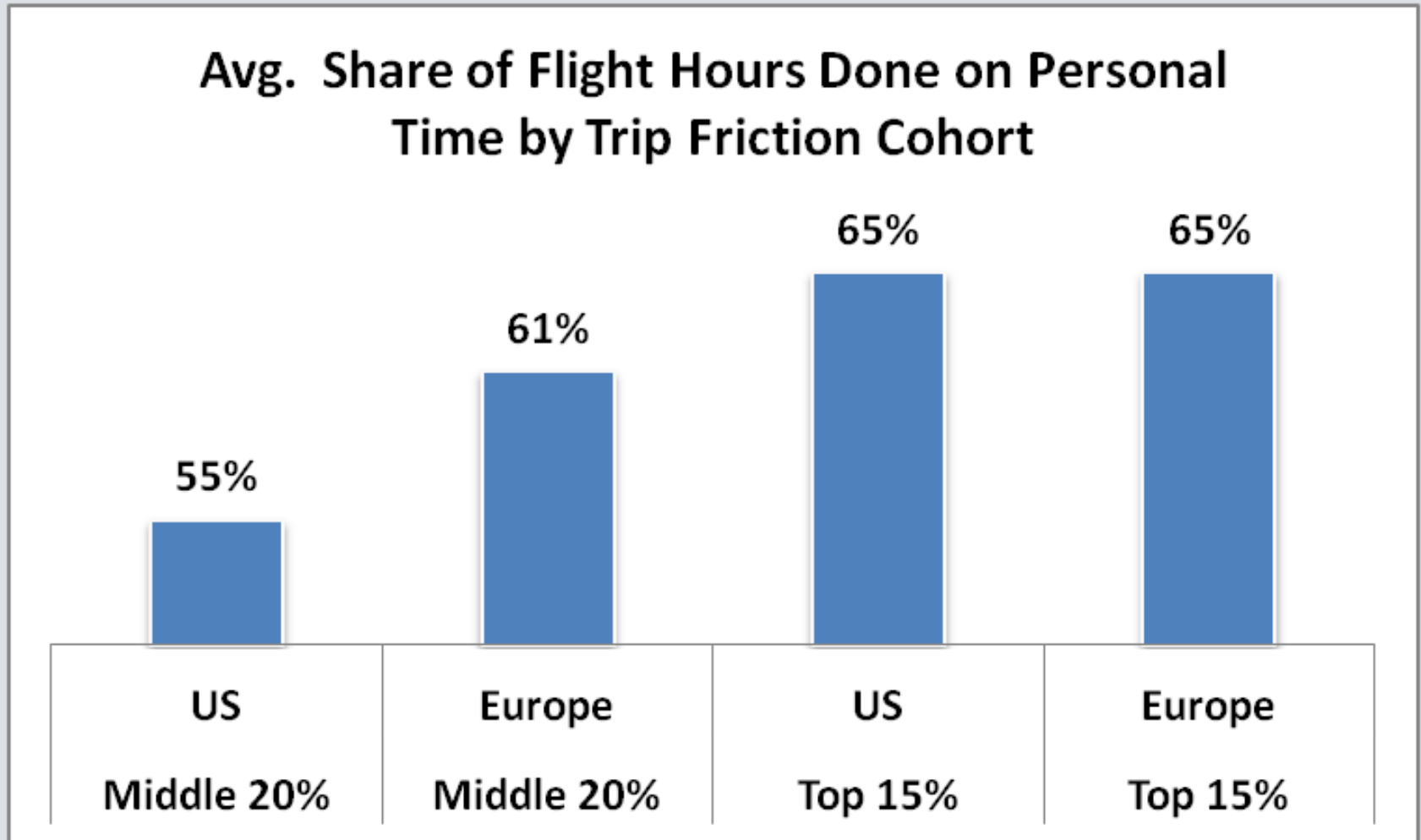
Source: tClara LLC

Trip Friction™ Benchmark Findings



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Trip Friction™ Benchmark Findings



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Road Warrior* Benchmarks

(*Top 15% of all travelers by Trip Friction™ points)

Selected Trip Friction Metric (Averages)	U.S. Travelers	European Travelers
Nights Away per Month	9.4	6.1
Flight Hours per Month	32.0	15.9
Share of Flight Hours Booked in Economy Class	82%	66%
Share of Flight Hours on Personal Time	65%	65%

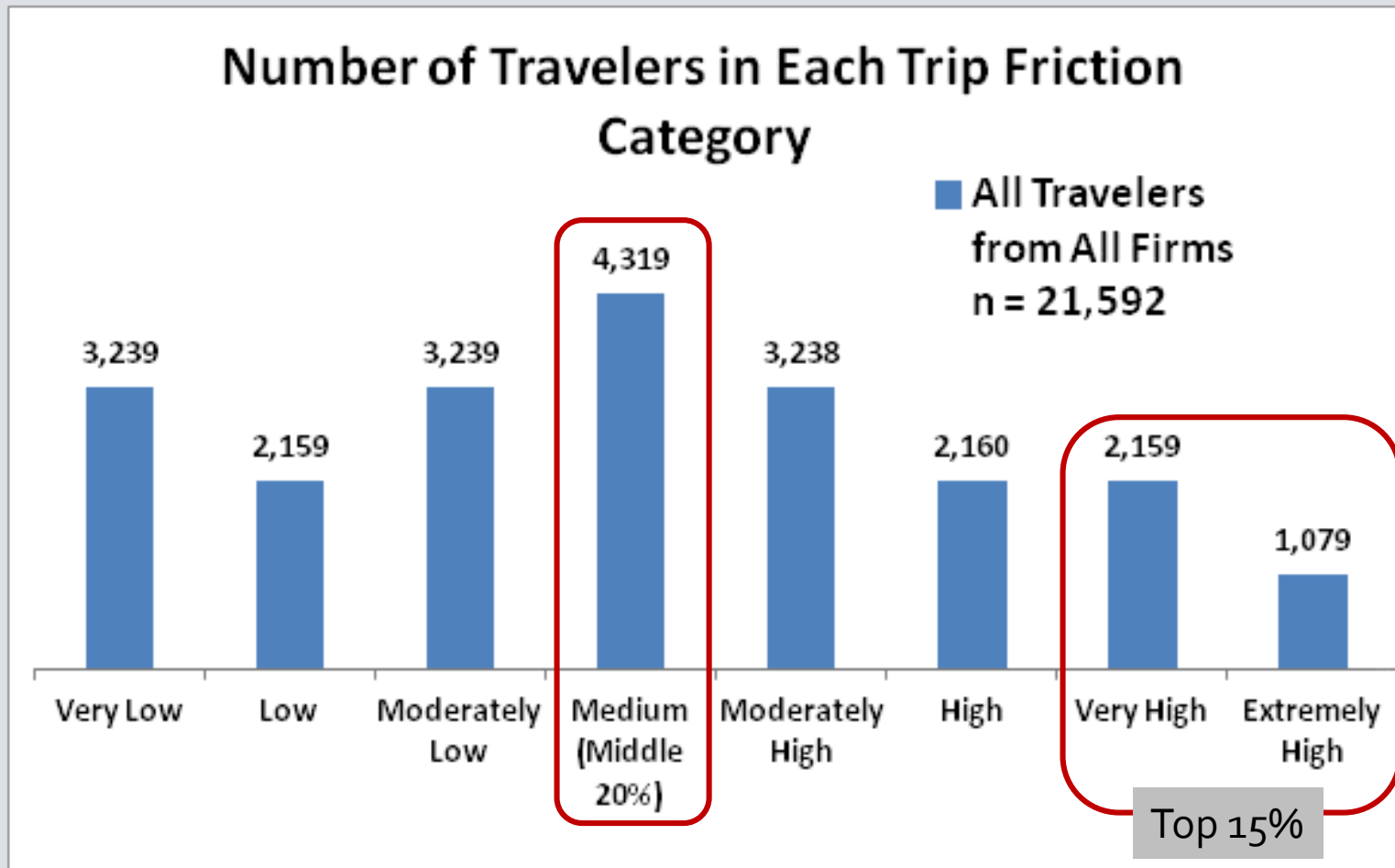
Source: tClara LLC

**How do you
get the right
balance
between
cost and
comfort?**



Step 1 – Identify two cohorts of travelers

Use Trip Friction analysis to categorize travelers objectively



Step 2 - Choose metrics that matter, and build a fact base from each cohort

Travel Impact Metrics

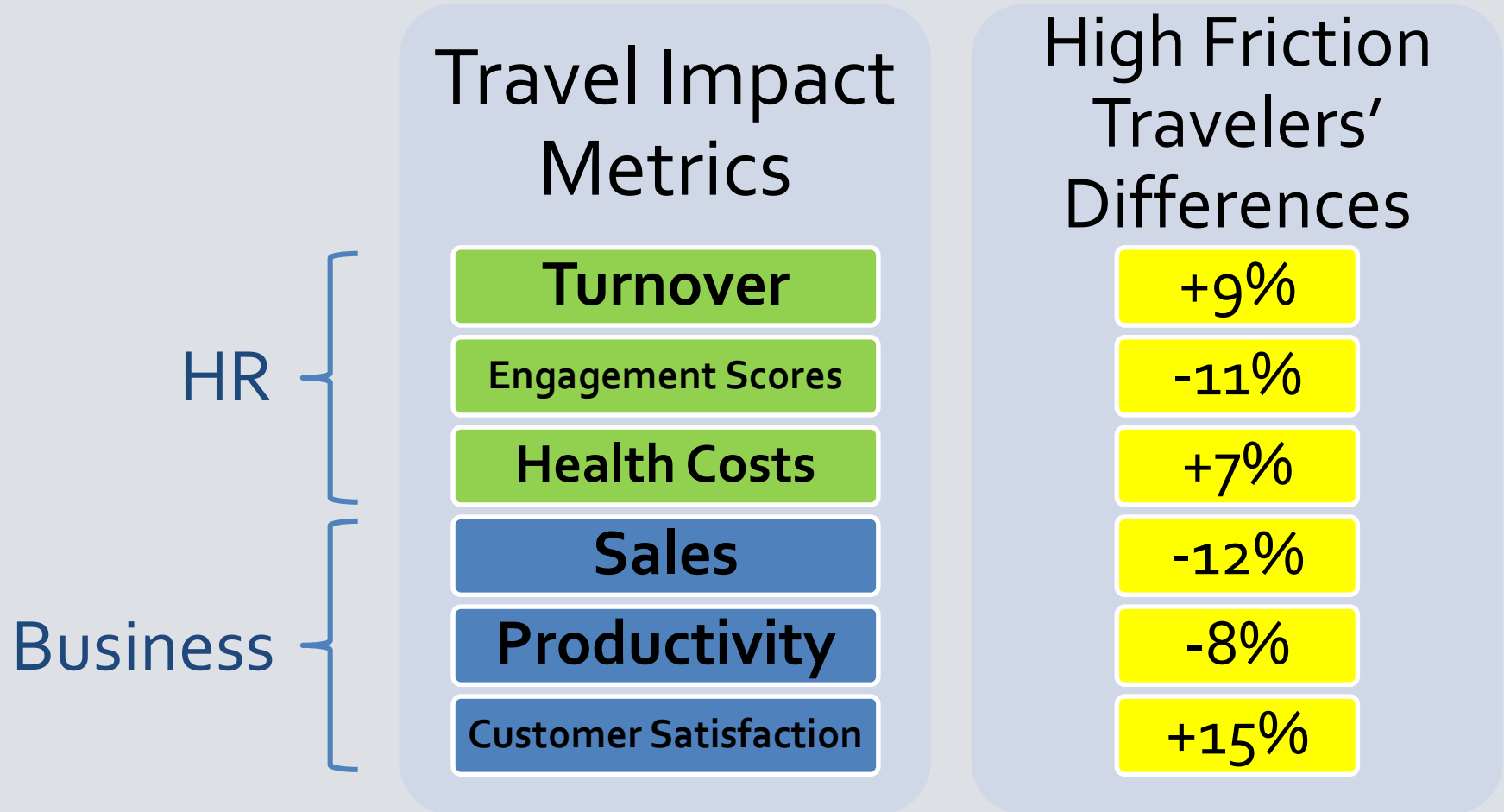
HR

- Turnover
- Engagement Scores
- Health Costs

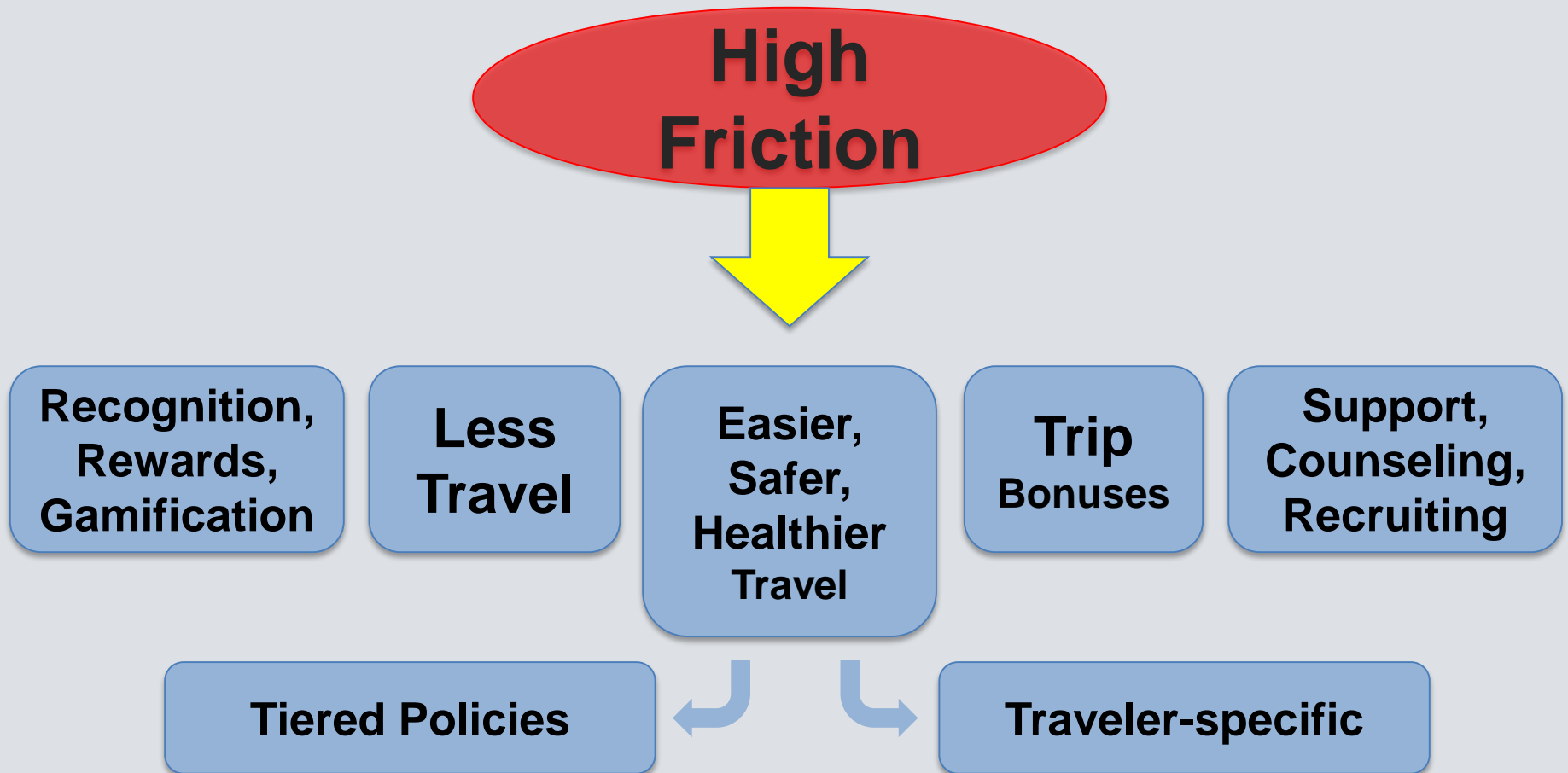
Business

- Sales
- Productivity

Step 3 - Then test for differences between the two cohorts



Step 4 - Develop mitigation strategies for this key group of travelers

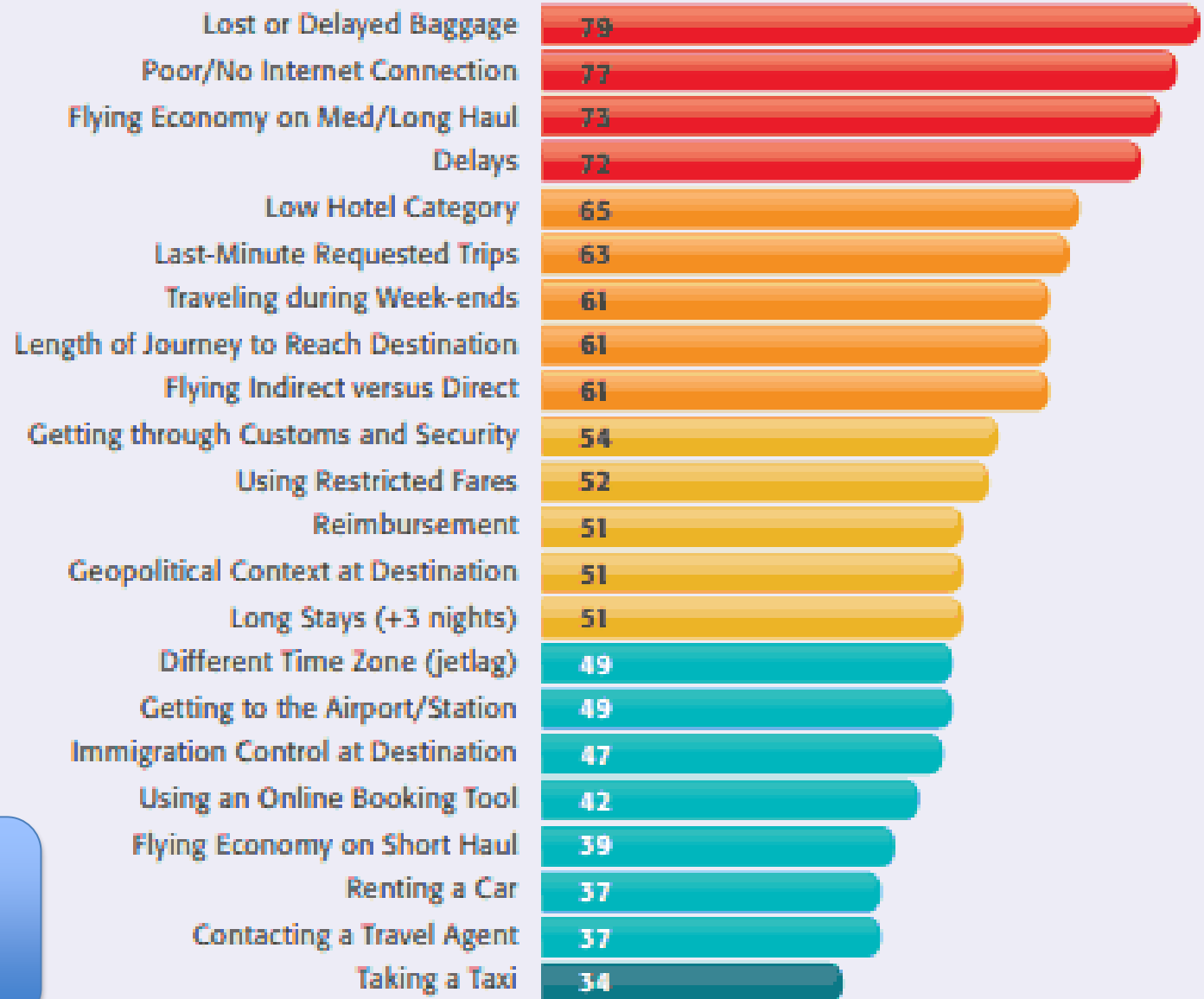


Road Warrior Insights

- **Christopher Hom:** Global Real Estate at Dropbox
- **Chris McGinnis:** Travel correspondent, columnist and consultant at TravelSkills

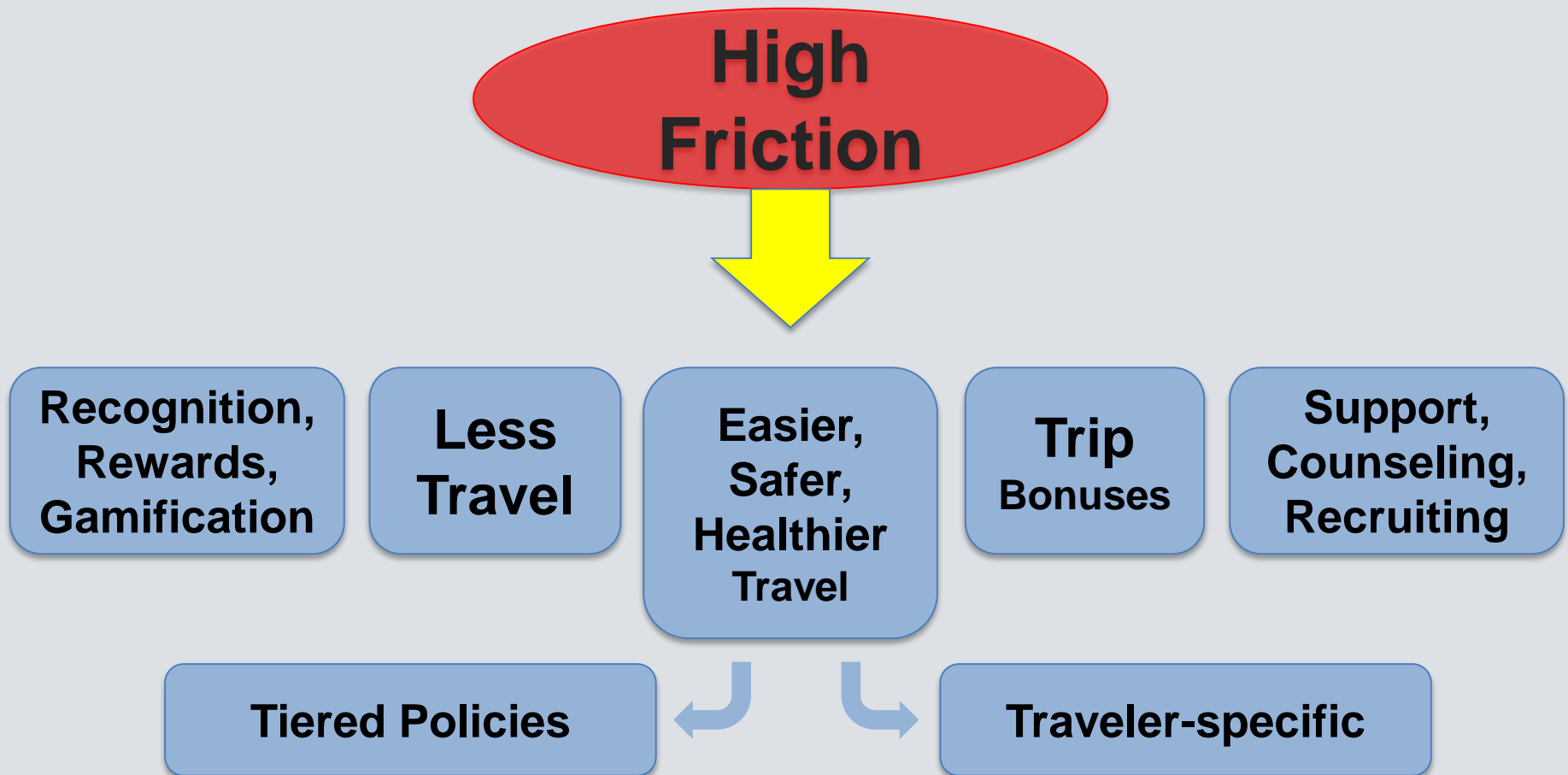
- Your travel policy environment?
- Your biggest travel friction points:
 - Related to your travel policy?
 - Related to your company culture?
 - Related to your travel suppliers?
 - Advantages of having preferred suppliers?
- Best things your firm could do to make your travel workload easier?

Stress factor Strength SF



CWT's Traveler Stress Index

How should your firm make your travel workload more sustainable?



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