

SUSTAINABILITY IN BUSINESS TRAVEL

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December 2023



Introduction

The attention to business travel as a source of carbon emissions and a contributor to climate change keeps growing. Being motivated by concerns for the environment, as well as commercial interests, companies are increasingly setting ambitious sustainability targets aligned with climate science. They are incorporating a variety of sustainability measures, from calculating emissions arising from their activity and improving data transparency to offering green alternatives to their employees. Given their ability to increase awareness and promote sustainable behavior in travelers, organizations play a crucial role in reducing their negative environmental impact.

BCD Travel recently surveyed more than **100 travel buyers** and almost **1,800 business travelers** to gauge the importance of environmental sustainability in business travel. This report aims to explore travel programs from the perspective of sustainability looking at the current priorities, challenges, opportunities and needs of travel buyers and travelers. From optimizing the number of business trips to providing sustainable transportation and accommodation options – we examine the various possibilities for companies to reduce their carbon footprint. We'll look at the upcoming trends in the sustainability space and provide an overview of the key regulations on sustainable travel that help drive awareness, innovation and investment. Finally, you'll get to learn about the sustainability products and solutions that BCD offers to those who are willing to act, thus, making sustainable travel more accessible for everyone.

Icon key



Travel buyers



Travelers



Sustainability is a growing priority for corporate travel managers and this new research paints a clear picture on the challenges and opportunities they, and their travelers, face. With new legislation coming in a number of countries around the world, there will be an increased focus on reporting and reducing emissions from business travel in the near future. BCD is committed to providing our customers with the insights, tools and support they need to stay ahead of the curve.



OLIVIA RUGGLES-BRISE

Vice President, Sustainability at BCD Travel

Sustainable travel as a program priority

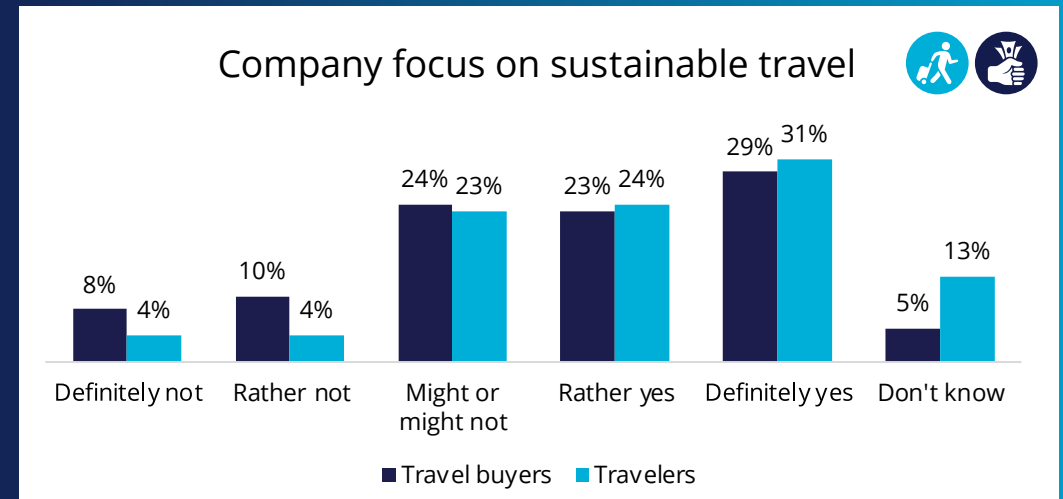
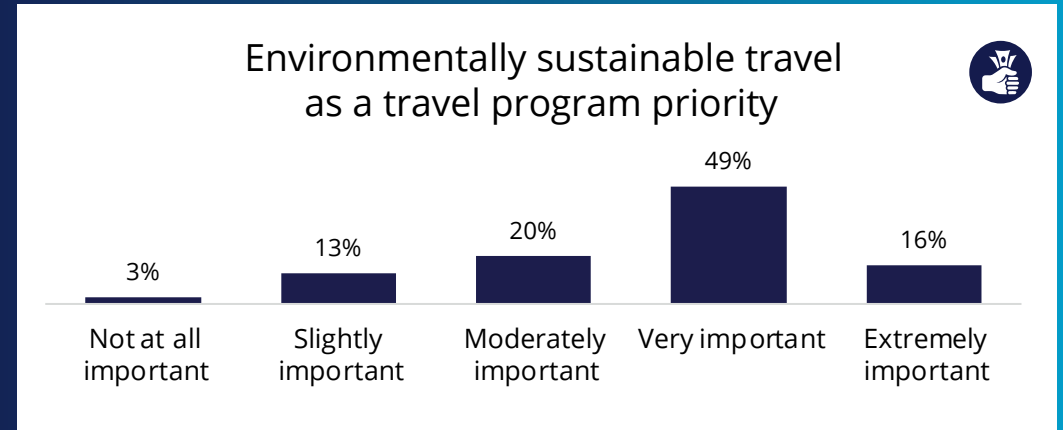
Two thirds of travel buyers recognize sustainability's high importance.

Sustainability entered travel buyers' list of travel program priorities a while ago, and it has continued gaining importance ever since, along with duty of care, policy compliance and cost control. We are keeping a close eye on its development over time.

In BCD's survey on sustainability carried out in July 2023, two thirds of travel buyers rated environmentally sustainable travel as extremely or very important. This view hasn't changed in more than two years, when we conducted the last survey on this topic. In both cases, the weighted average was 3.7 on a 1-to-5 point scale from "not important at all" to "extremely important."

While the topic is undoubtedly important, only around half of travel buyers can say their travel program encourages sustainable travel and 42% admit the opposite. This latter figure went up slightly from the 39% recorded in our last survey in 2021. Meanwhile, the share of travel buyers who admit their travel program encourages green travel stayed the same.

Travelers share somewhat similar views. Over half (55%) report their employer promotes sustainable business travel. At the same time, a smaller share have a negative perception of sustainability related to their company's travel program, with 8% saying it does not encourage sustainable travel vs. 18% of travel buyers. Uncertainty on the subject is higher among travelers, 13% of whom aren't able to rate the sustainability of their travel programs.





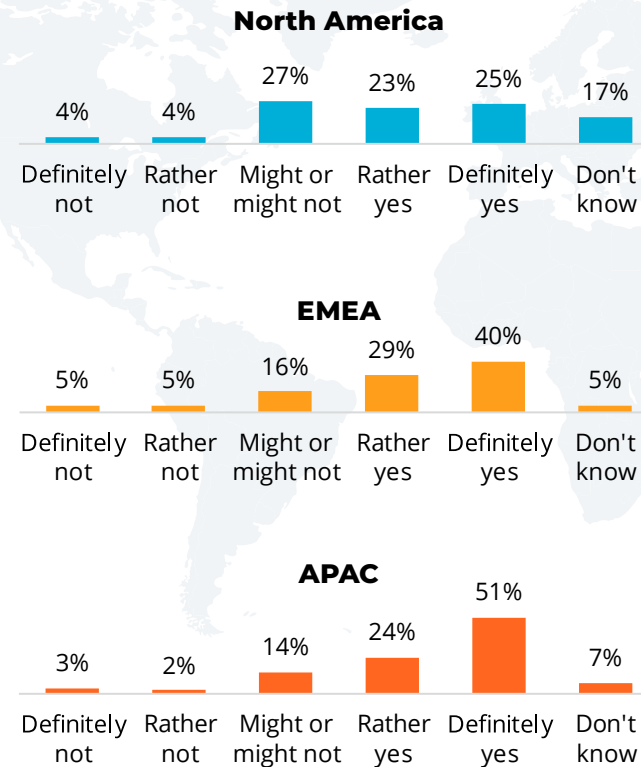
Company focus on sustainable travel by region



Three quarters of travelers in Asia Pacific say their employer encourages sustainable travel vs. less than half in North America.

Traveler views differ by region. In Asia Pacific (APAC) and in Europe, the Middle East and Africa (EMEA) more travelers share positive opinions, with 75% and 69% respectively saying their employer promotes sustainable travel. In APAC, half are certain about this. In North America (NORAM) this number is lower: Only 48% of respondents report their program encourages environmentally friendly travel behavior. Compared to other regions, more North American travelers have no opinion on this issue.

Company focus on sustainable travel, traveler view by region





Sustainability goals

Despite the importance of sustainability, almost half of travel buyers don't have company sustainability goals related to travel.

Sustainability is reflected in the general and specific goals set by companies. We asked travelers and travel buyers whether their companies had general and travel specific sustainability goals (see page 6). Eight in 10 travel buyers and almost six in 10 travelers are aware of company sustainability goals set by their employer. However, one tenth of travel buyers and a third of travelers have no knowledge of this topic.

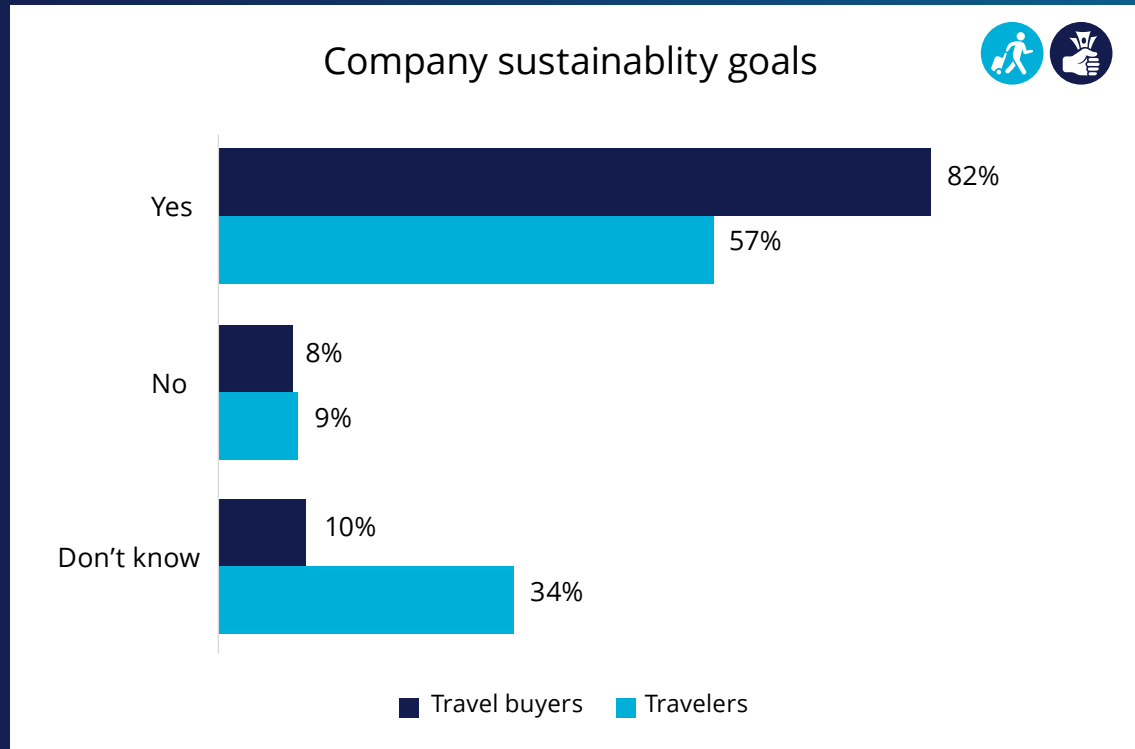
There are considerable regional differences in traveler responses. While in NORAM 50% are aware of company sustainability goals, in EMEA and APAC the figures are higher: Over 70% of traveler respondents admit having these goals in place. Sustainable travel goals are familiar to 13% of American respondents vs. 31% in Europe and 40% in Asia, revealing a significant gap between travel buyers' and travelers' views.

When it comes to travel sustainability goals, the numbers are lower. The responses of travel buyers are split: 45% say their companies set sustainability goals related to business travel, and the same share do not do this. Meanwhile, only 20% of travelers are aware of travel sustainability goals, and a similar share report not having such goals. The majority - around two thirds of traveling employees - are not sure.





Sustainability goals



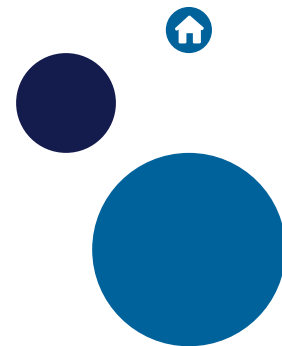
Travel buyers' sustainability priorities

Supporting company goals is travel buyers' top sustainability priority.

Dealing with the increasing importance of sustainable travel, travel buyers work on various aspects of travel programs striving to decrease their impact on the environment. In the survey, they shared their current sustainability priorities related to business travel.

The top-three include supporting general company goals, reporting on sustainability and reducing carbon emissions from business travel (see page 8). Over two thirds rate these priorities as extremely or very important. Meanwhile, offsetting the impact of travel and satisfying travelers' interest in sustainability happen to be at the bottom of the list.

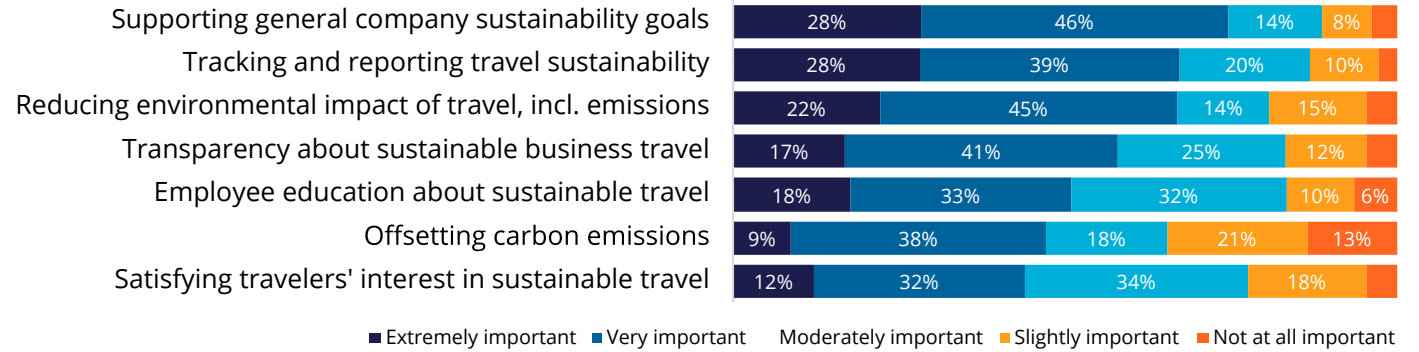
Since 2021, the ranking hasn't changed, though the importance of all priorities has slightly dropped. The rating of emissions offsetting went down the most, losing half a point of a weighted average. Instead of compensating for the incurred damage, companies are looking for possibilities to minimize the negative impact of travel in the first place.



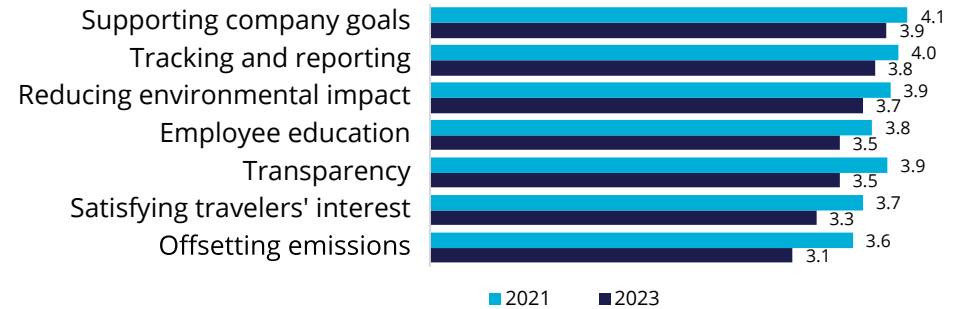
Travel buyers' sustainability priorities



Sustainability priorities related to business travel



Sustainability priorities: 2023 vs. 2021 weighted average





Benefits and challenges of a sustainable program



An enhanced company reputation and personnel recruitment are among the top advantages.

Companies embracing sustainability are often seen as leaders in their sectors. They are able to seize the opportunity and build a future-proof business, capitalizing on cost saving and innovation. The results of our study show that, in addition to care for environment, travel buyers see improved company reputation and staff recruitment among the major benefits of adopting a sustainable travel program (see page 10). Traveler satisfaction, support for local communities and regulatory benefits add to the list of advantages. Compared to 2021, the rankings stayed the same.

Travelers shared their motives for sustainable behavior on the road. In addition to care for environment, company sustainability goals, financial savings and

support for local communities are major reasons for their sustainable travel choices. Personal reputation and employers' incentives are less important.

Despite the multiple benefits, companies face various challenges on the way to sustainability transformation that aren't easy to overcome. The biggest travel buyers' pain point on the way to a sustainable travel program is related to the high cost of sustainable travel options: Over half of the survey respondents say so. At the same time, a third see reduced spend as a benefit. Among other frequent challenges, travel buyers mention traveler education, and a lack of standards and tools. Compared to 2021, some points have become less challenging, such as traveler education (47% vs. 61%), availability of tools (44% vs. 56%) or time (22% vs. 37%).

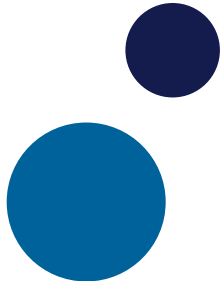
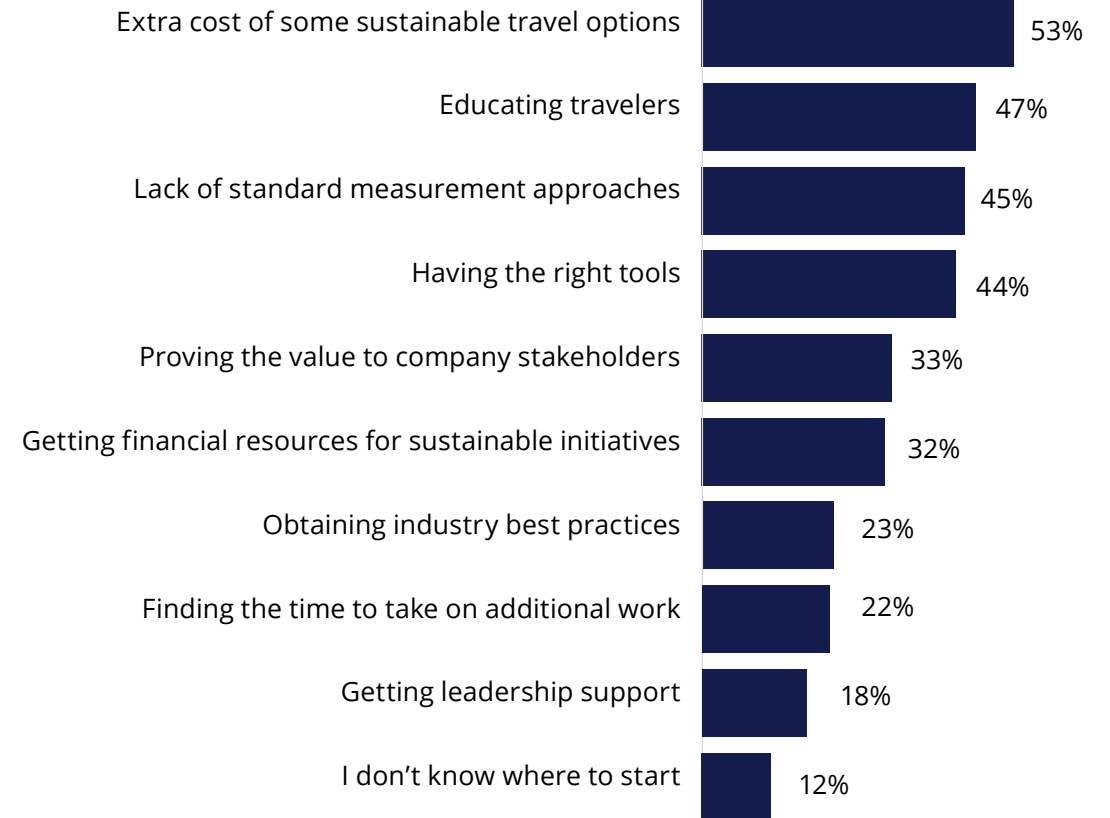
Benefits and challenges of a sustainable program



Benefits



Challenges



Stakeholders' sustainability

Business travelers perceive the sustainability efforts of internal travel departments as particularly low.

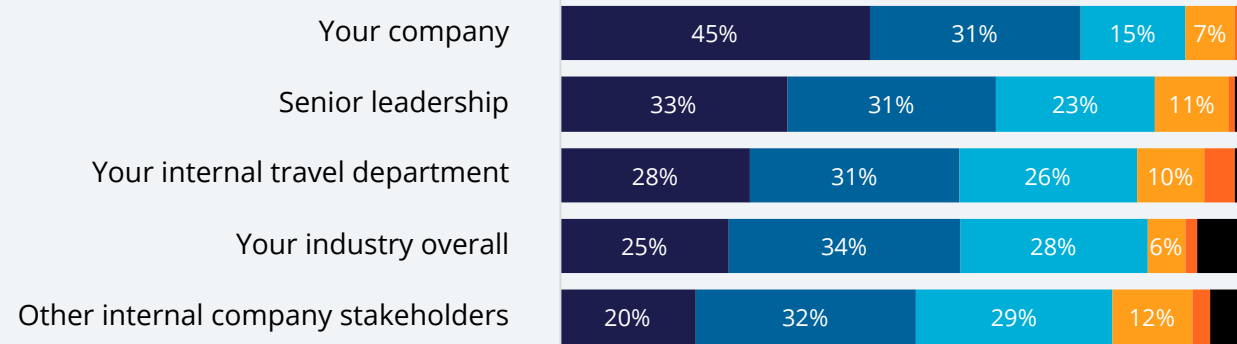
All company stakeholders contribute to sustainability transformation, but the extent of their involvement isn't the same. Travel buyers and travelers have different views on the sustainability efforts of their company units. Both perceive the businesses overall, including their senior leaders, as those who pay most attention to the topic of sustainability. They occupy the top-two positions in the ratings compiled by both audiences.

Travel buyers' ratings are overall higher. Six in 10 rate travel departments' sustainability as very high or high, thus, placing travel teams in the middle of the list. This hasn't changed since 2021. Traveler evaluations are much lower: Only one in five highly assess their travel teams.

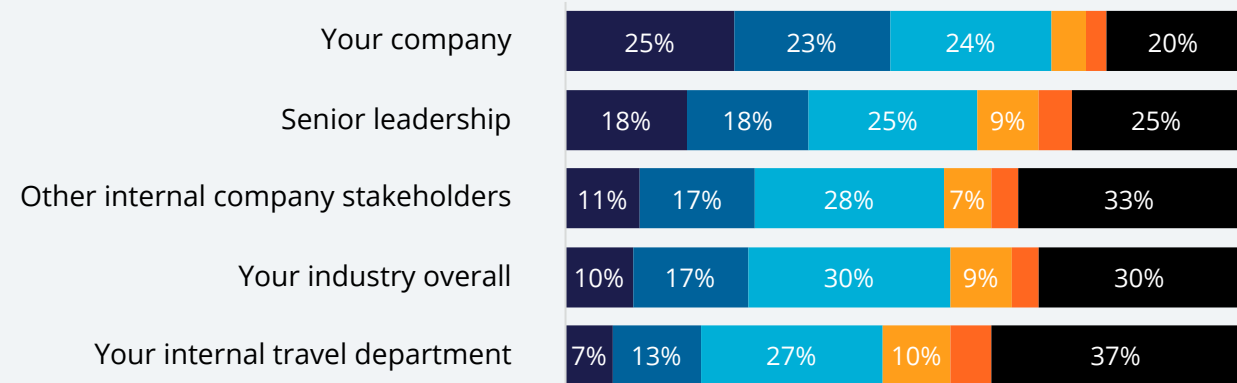
A considerable share of traveling employees – between 20% and 40% – lack knowledge of this topic, being unable to estimate the sustainability efforts of company stakeholders. While many employers place sustainability high on their agendas, employee communication on sustainability matters needs further attention.



Stakeholders' sustainability efforts, buyer view



Stakeholders' sustainability efforts, traveler view



■ Very high
 ■ High
 ■ Average
 ■ Low
 ■ Very low
 ■ Don't know



Suppliers' sustainability

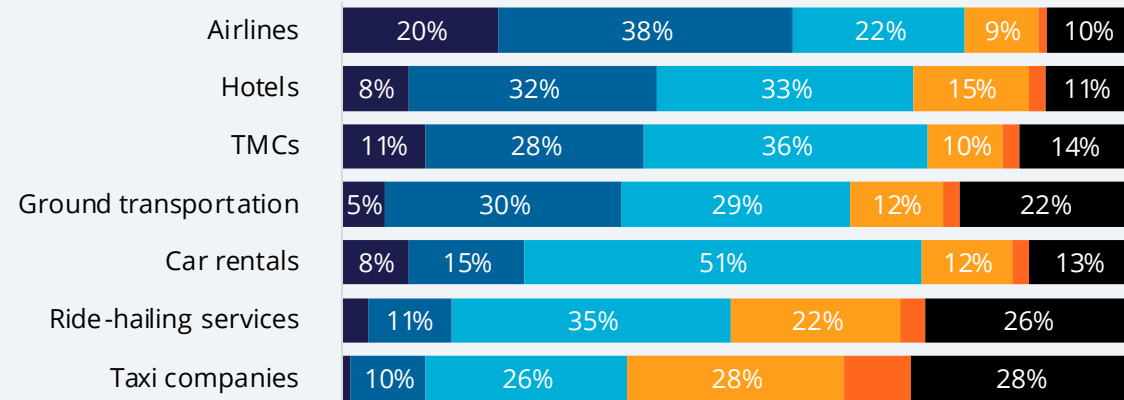
Four in 10 travel buyers rate TMC sustainability efforts as high, placing them third among travel suppliers.

Travel buyers and travelers shared their views of suppliers' sustainability efforts. Of the main travel suppliers, travel buyers rate airlines' sustainability the highest: Six in 10 assess it very high or high. Hotels and travel management companies (TMCs) follow, with four in 10 providing high evaluations to their green efforts. Ground transportation suppliers, including taxis and ride-hailing companies, are in the lower half of the list, although over a fifth of buyers are unable to assess their sustainability.

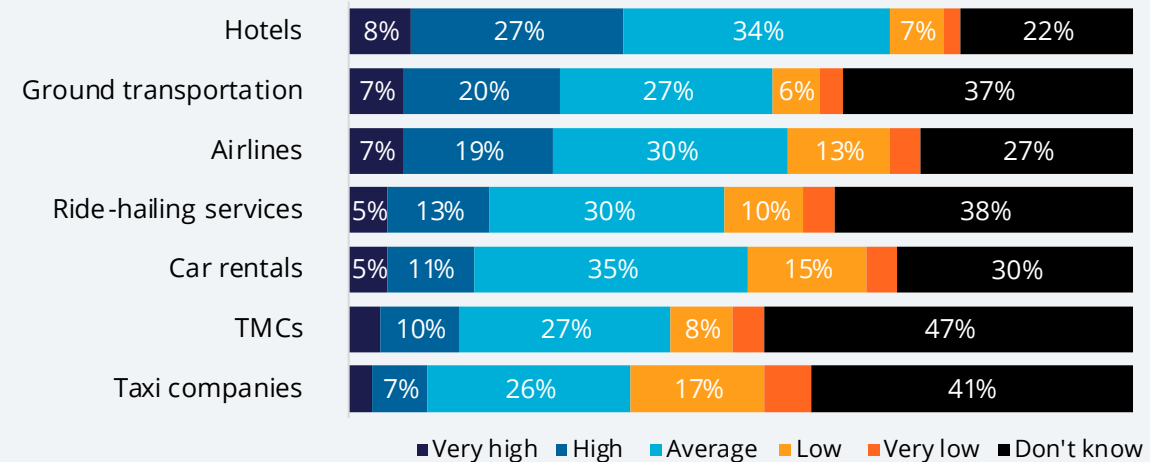
Compared to 2021, the rankings stayed the same, however, ratings for every single category went down. For example, in 2021, more buyers rated airlines high or very high: 72% vs 58% in 2023. For TMCs, the number went down by seven points.

Traveler evaluations are considerably lower than those of buyers. Their list is led by hotels - 35% rate their sustainable efforts very high or high, followed by ground transportation and airlines. Only 14% say the same about TMCs. Similar to stakeholders' sustainability efforts, travelers are often unsure how to assess travel suppliers' sustainability aspirations.

Suppliers' sustainability efforts, buyer view



Suppliers' sustainability efforts, traveler view

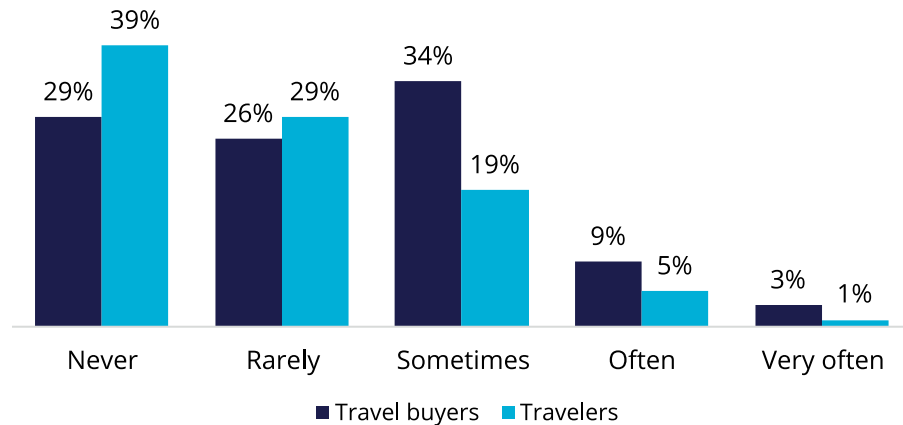




Communication about sustainable travel

Travelers and travel buyers don't regularly interact on sustainable travel.

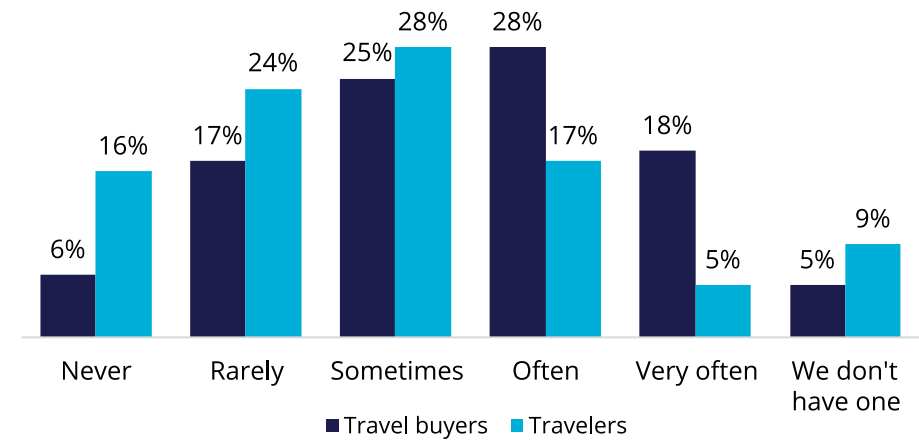
Communication on sustainability matters between travelers and travel departments



Interaction between travelers and travel buyers is an important part of any travel program, and sustainability matters are not an exception. Almost half of travel buyers mention traveler education as a challenge on the way to a sustainable travel program, yet three in 10 never communicate with their travelers on sustainability matters. A quarter rarely talk to travelers about sustainability, while only one in 10 do so often or very often. Travelers share more conservative ratings with four in 10 never interacting with their travel teams on sustainability.

Sustainability departments are among major company stakeholders when it comes to green travel. When working on their sustainability agenda, nine in 10 travel buyers talk to their

Communication with sustainability team



company sustainability manager or the team. Encouragingly, the frequency of interaction has increased since 2021: Today, 46% of buyers do so often or very often vs. 30% two years ago. While in the past, 22% of travel buyers never talked to sustainability teams, today this figure has slumped to 6%. In 2023, only 5% don't have a sustainability manager, vs. 17% in 2021.

Travelers directly interact with sustainability teams less frequently than travel departments. Four in 10 never or rarely receive travel-related communications from sustainability managers, while around only two in 10 receive them often. Finally, 10% of business travelers claim their companies don't have sustainability teams.

DO YOU RECEIVE ENOUGH INFORMATION ON SUSTAINABLE TRAVEL FROM YOUR EMPLOYER?



22%

Yes

48%

No

30%

Don't know

Educational material on sustainability



Three in 10 travel buyers never send travelers communication about sustainable travel.

Travel buyers talk to travelers about sustainability with varying frequency and use different means for communication (see page 15). Half send emails or share blog posts or articles on company intranets, three in 10 share reports and research findings, and a quarter forward travelers tips from travel suppliers. Training on sustainable travel isn't too popular: Only 10% of buyers offer this to traveling employees.

Business travelers admit receiving the least amount of sustainability content from their employers. Almost a quarter are unsure if they are provided with any related resources.

Regional analysis shows travelers from APAC and EMEA receive more emails, blog posts and articles on sustainable travel, while those in NORAM get the least (48%, 44% and 26%, respectively). Training is more popular in the APAC region. In NORAM, four in 10 travelers receive no educational material on green travel policies and behaviors.

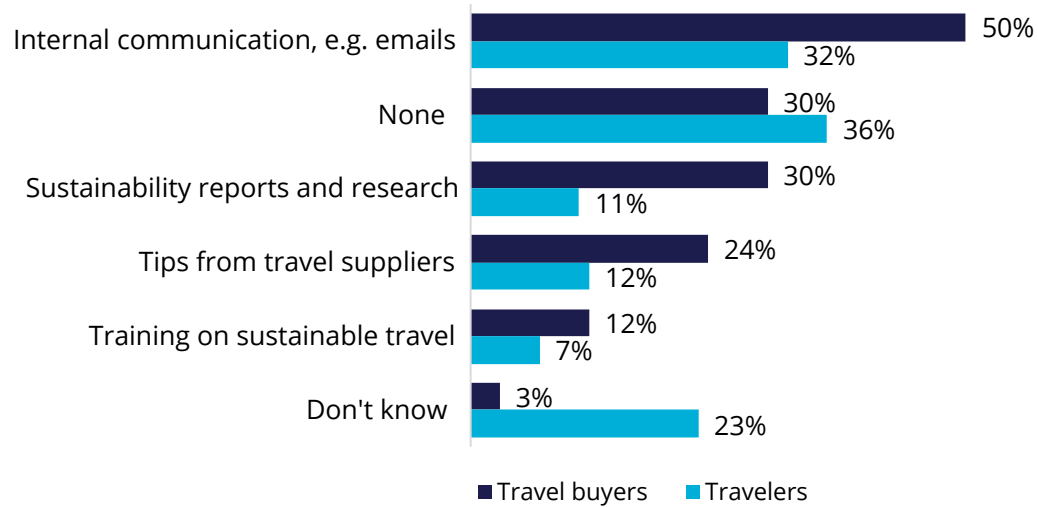
Thus, travel buyers provide their travelers with limited resources on sustainable travel. Travelers lack awareness on sustainability and express the need for more frequent and diverse interaction. Only two in 10 travelers confirm receiving enough information, while almost half would like to receive more. This holds true for all regions under consideration. Rich and timely employee communication defines the impact of the company activities critical to achieving its sustainable goals.



Educational material on sustainability



Educational material on sustainability shared by travel buyers / received by travelers



Educational material received by travelers, by region





Sustainable travel options encouraged by employers

When it comes to sustainability, employers tend to encourage reducing the number of business trips.

Today's corporate policies frequently lack actionable opportunities for sustainable travel choices. Despite the importance of the topic, only a third promote eco-friendly options at the point of booking, as we found out in our research. Below we look at the sustainable travel policies encouraged by employers (see page 17).

First, balancing the need for business travel with the emissions produced as a result is utterly important for reducing the environmental impact of corporate travel. According to the survey results, reducing travel volumes is promoted by travel buyers the most. It rose from the fourth position in 2021.

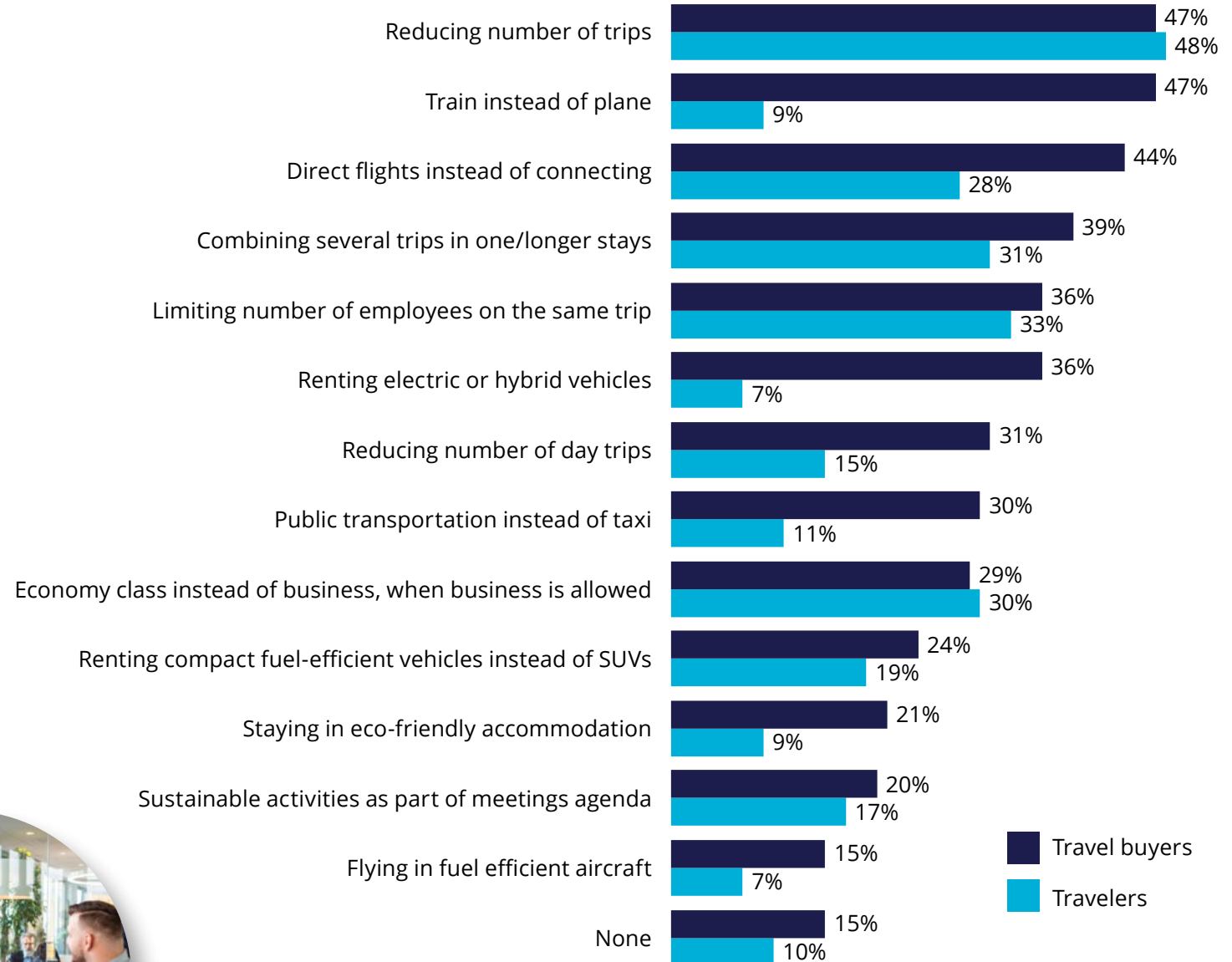
Other sustainable travel options frequently offered by travel buyers include traveling by train instead of plane, using direct flights instead of connecting and combining several trips in one. They are mentioned by over four in 10.

Travelers mostly agree, quoting similar sustainable travel policies at their disposal. Limiting the number of employees on the same trip and using economy class instead of business, when the latter is allowed, are also in their top choices. Travelers mention using train instead of plane less frequently due to the prevailing number of survey takers from North America, where travel by train isn't overly popular.

Flying in fuel efficient aircraft or staying in eco-friendly hotels are at the bottom of the list, being rarely offered. At the same time, 15% of buyers and 10% of travelers report no sustainable travel options being offered by their companies.



Sustainable travel options encouraged by employers



Sustainable travel options by region

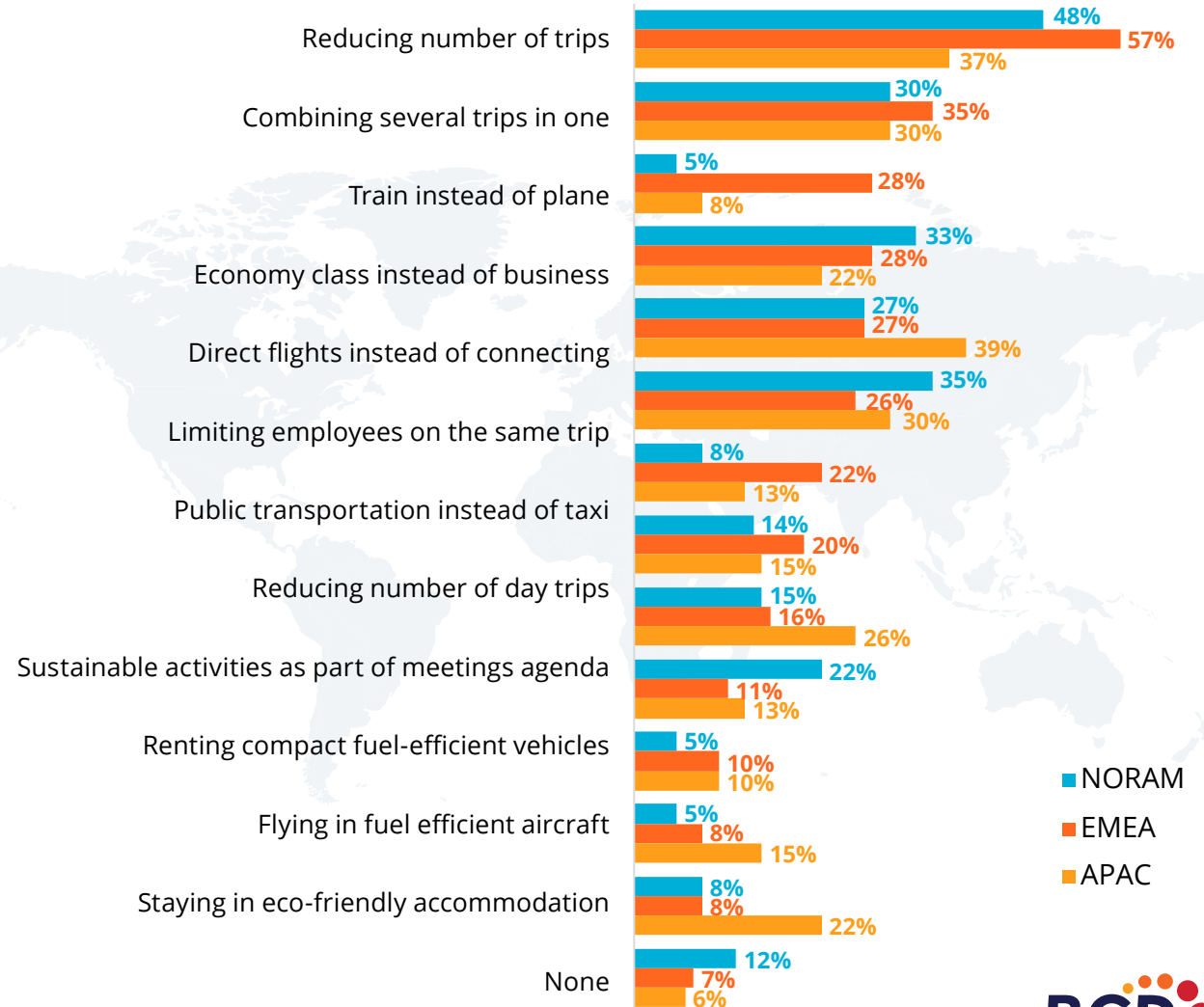
Travelers confirm that sustainable travel options promoted by employer differ by region.

Travelers' views on sustainable travel options encouraged by employers differ by region. In NORAM, companies promote using economy class instead of business, when the latter is allowed, more than in other regions. Limiting the number of employees on the same trip is also more common, with a third of respondents mentioning this option. Meanwhile, using the train instead of flying and public transportation instead of taxi are less typical.

In EMEA, reducing the number of business trips is widely spread, with more than half of travelers mentioning this option. This is reflected in related policies as reducing day trips and combining several trips in one. Over a quarter say their employer encourages the use of train over plane. This is considerably higher than in other regions. The employers in EMEA tend to promote the use of public transportation instead of taxi more.

In APAC, four in 10 travelers say their employer encourages direct flights instead of connecting, while in other regions this figure is 12 points lower. Every fifth traveler mentions the promotion of stays in eco-friendly accommodation and every sixth is encouraged to fly in fuel efficient aircraft. Incorporating sustainable activities as part of meetings' agenda isn't unusual, being reported by a quarter of the APAC sample.

Sustainable travel options offered by employer, by region



■ NORAM
 ■ EMEA
 ■ APAC



Sustainable traveler behavior

Traveling employees adopt a variety of sustainable behaviors when on business trips.

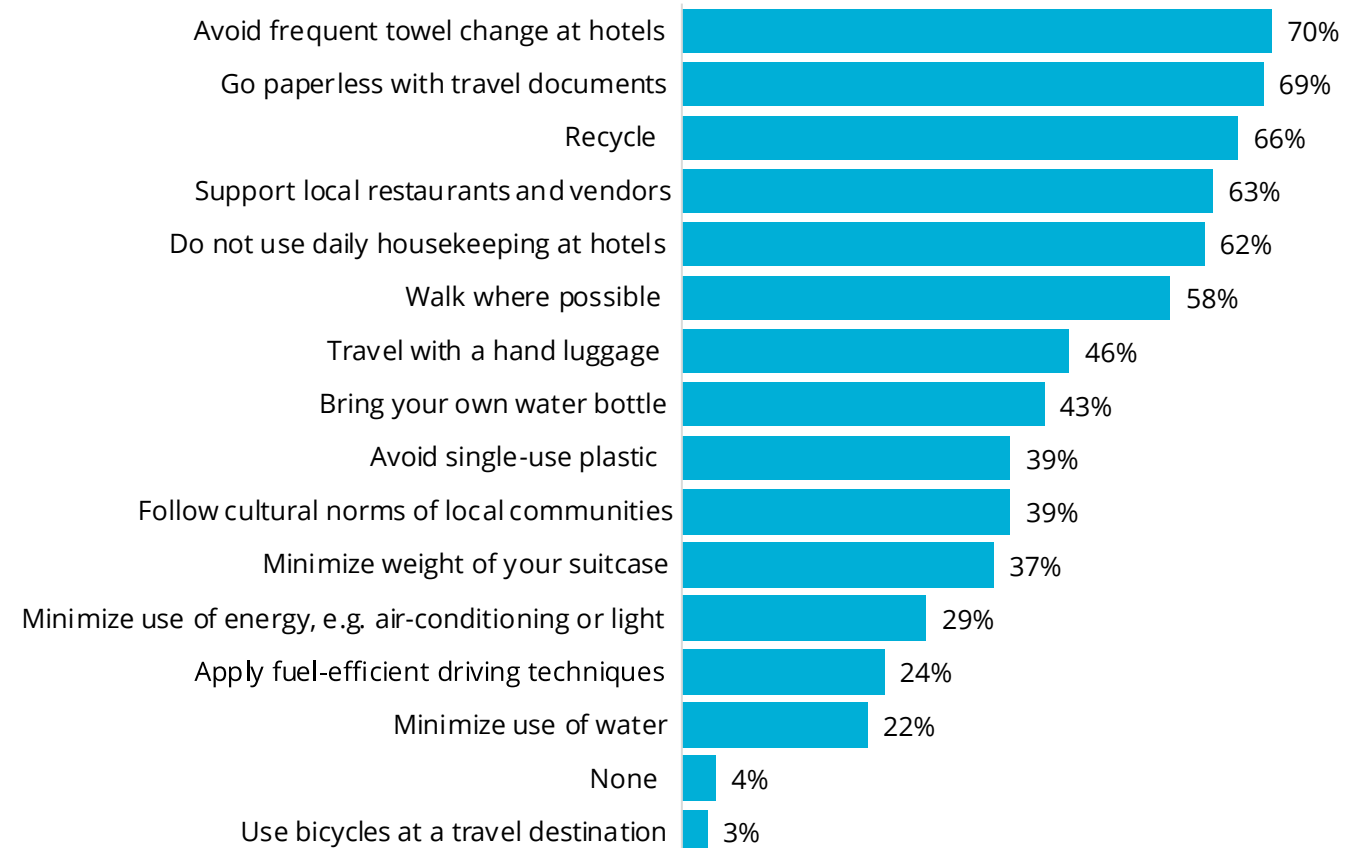
In addition to the sustainable travel policies promoted by their companies, travelers may be willing to adopt conscious behaviors on the road. This depends on their personal values, as well as education by the employer. These sustainable behavior practices include a wide variety of measures, from saving natural resources to respecting local communities.

The most popular examples are related to traveler behavior at hotels, where seven in 10 avoid frequent towel change and six in 10 refrain from daily housekeeping. A similar share recycle or go paperless with their travel documents. More than half support local vendors.

Four in 10 travel with hand luggage only or minimize the weight of their suitcase on business trips. A similar share refill their own water bottles and avoid single-use plastic. Meanwhile, saving energy or water is slightly less popular with less than three in 10 doing so when traveling for work.

While more than half of respondents walk where possible, business travelers' use of bicycles at business destinations is minimal.

Sustainable traveler behavior





Sustainable traveler behavior by region

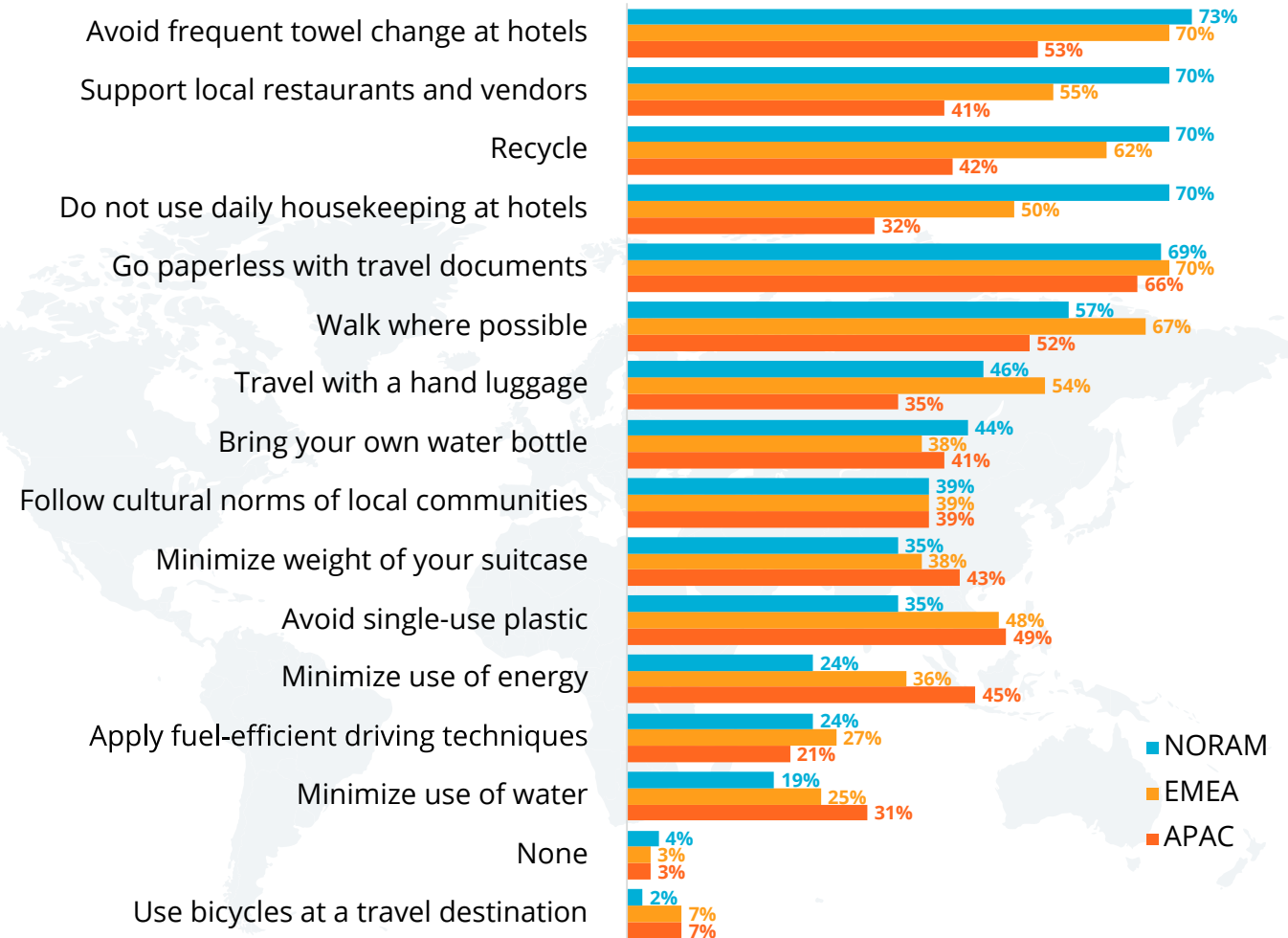
Travelers from EMEA, NORAM and APAC show different sustainable behavior while on the road.

Depending on the region, travelers demonstrate different behaviors at business destinations when it comes to sustainability. Those from NORAM tend to support local vendors, recycle and refrain from daily housekeeping more than their counterparts from EMEA and APAC. At the same time, they are less focused on saving resources or avoiding single-use plastic.

Travelers from EMEA, where possible, would walk around destinations rather than take public transport: Two thirds say so vs. a bit over half in NORAM and APAC. They are also more inclined to travel with hand luggage only.

The APAC respondents pay more attention to minimizing their use of energy and water at business destinations. On the other hand, avoiding daily housekeeping and towel change, recycling and supporting local restaurants are less popular among this group of travelers. Also, they'd try to reduce the weight of their suitcase rather than giving up checked luggage.

Sustainable traveler behavior, by region



Sustainable traveler behavior by gender

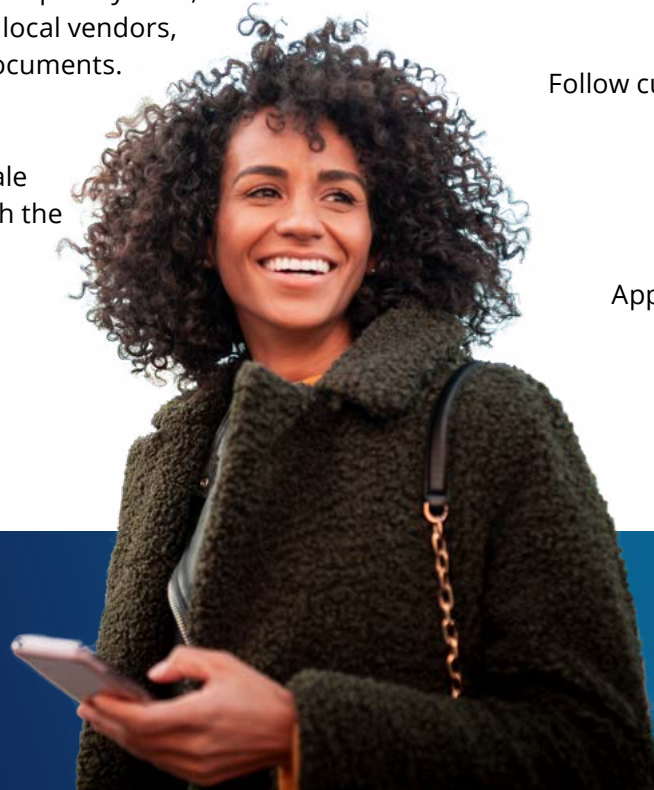
Compared to men, female business travelers are more likely to adhere to sustainable travel behavior on the road.

In addition to regional variations, sustainable traveler behavior differs for men and women. Overall, female travelers are more likely to demonstrate environmentally conscious behavior on the road.

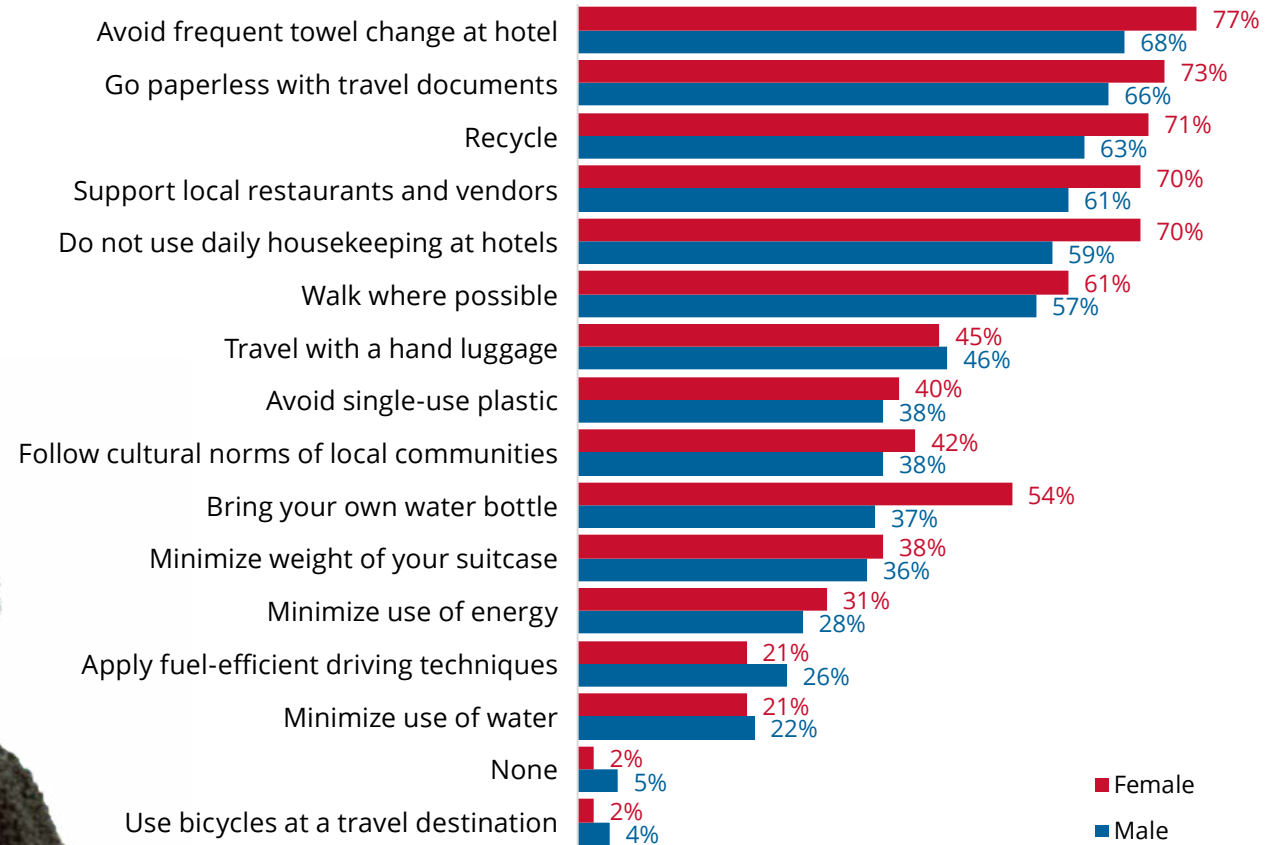
The gap exists regarding traveler behavior at hotels: Women tend to avoid daily housekeeping and towel change more frequently. Also, considerably more female travelers support local vendors, recycle, and go paperless with their travel documents.

Over half of female travelers bring their own reusable water bottle on a trip vs. 37% of male traveling employees: This is the category with the highest gender disparity.

Instead, men report applying fuel-efficient driving techniques more often.



Sustainable traveler behavior, by gender



Changing sustainable traveler behavior



Travelers would rather take fewer trips than pay more for sustainable travel.

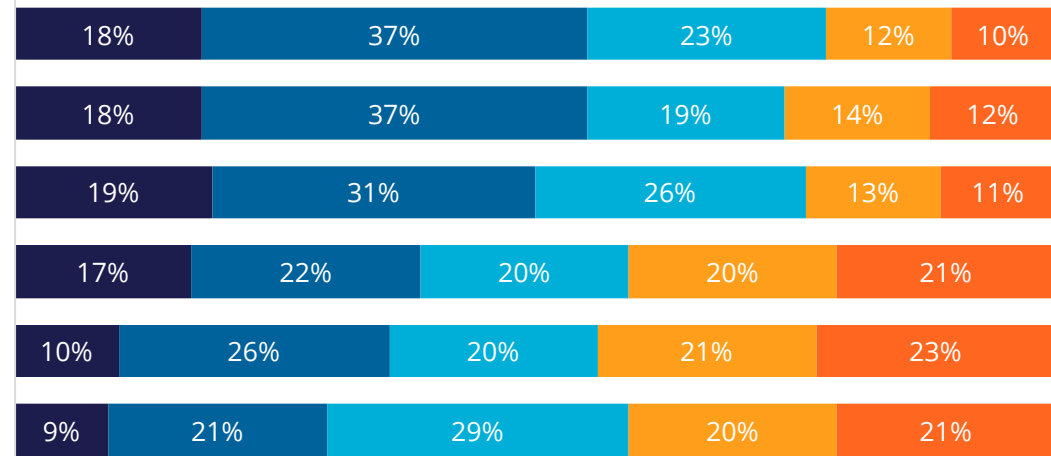
In addition to offering insights into their actual sustainable behavior on the road, when presented with six options, business travelers shared their willingness to embrace new ways of green behavior. The most popular options relate to trying more sustainable ways of traveling, such as car sharing, and taking fewer, but longer business trips. More than half (55%) of travelers are ready to do so. Meanwhile, only 30% are willing to

pay more for sustainable travel options to include a purchase of sustainable aviation fuel or carbon offsets. While travelers express mixed views over exchanging business class for economy for the sake of sustainability, their enthusiasm around spending more time to get to a business destination with fewer emissions is even lower: 44% aren't willing to do so.

Looking at the regional differences, fewer NORAM travelers are eager to pay extra, while in APAC the situation is the opposite: Half are prepared to be charged more. The APAC travelers show a higher willingness to try all the suggested options, while EMEA based respondents are more inclined to trying new ways of travel and sacrificing time by switching from air to rail to get to their destination.



- I would be happy to take **fewer, but longer trips**.
- I am comfortable to try **new, more sustainable ways of traveling**, such as car sharing or using public transport instead of a taxi.
- I would be happy to **travel less** in order to reduce my emissions.
- I would be happy to take **an economy class flight**, even if business is allowed, in order to reduce my emissions.
- I would be willing to **spend more time to get to a destination** if the emissions impact was less, for example take a train instead of a plane.
- I would be willing to **pay more** for travel to include an offset of carbon emissions or a purchase of sustainable aviation fuel.



Absolutely agree
 Somewhat agree
 Neither agree not disagree
 Somewhat disagree
 Strongly disagree

Companies' sustainability practices

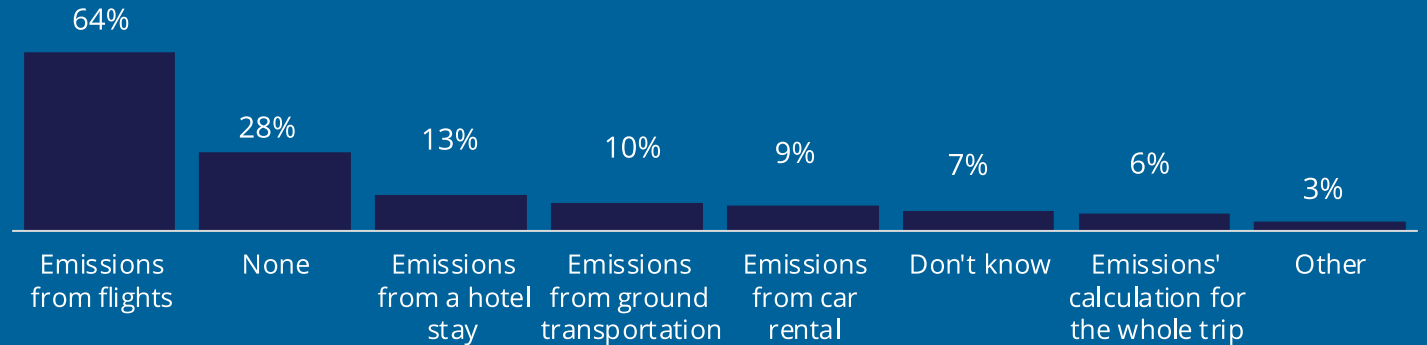
Companies increasingly implement various sustainability practices, though their adoption has been modest until now.

Companies striving to minimize travel's negative effects on the environment do so in various ways. The early-adopters work closely with travel suppliers and regulators and implement green initiatives directed towards travelers. They recognize the value created by embedding sustainability in their daily operations and strategic decisions. Here are a few examples of sustainable actions we explored in the research.

Providing carbon emissions data

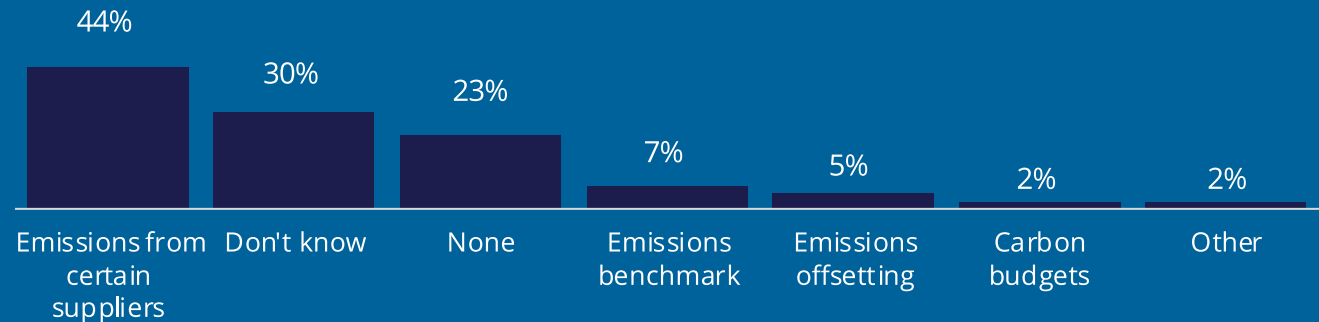


At the point of booking, two thirds of travel buyers provide their travelers with flight emissions data. Over a quarter don't share carbon emissions of any type.



Deploying sustainability features of online booking tools (OBTs)

While around four in 10 report their online booking tool has capabilities to show emissions generated by certain suppliers, almost a quarter say their OBT lacks sustainability features.





Offsetting carbon emissions



Less than a quarter of travel buyers currently offset carbon emissions from travel; three in 10 consider doing so.

23%

Yes

31%

No, but
considering

32%

No, and not
considering

14%

Don't
know

Purchasing sustainable aviation fuel (SAF)



Every sixth travel buyer reports buying SAF and 22% are considering doing so.

16%

Yes

22%

No, but
considering

42%

No, and not
considering

19%

Don't
know

Sustainable travel in 2024



In light of the research findings and the recent trends in business travel, these are the sustainability developments we anticipate for 2024.

More regulation, more reporting, more data

The EU's Corporate Sustainability Reporting Directive (CSRD) will come into effect in 2024, expanding on existing corporate sustainability disclosures. With the U.K., Australia and possibly the U.S. likely to follow, travel suppliers and their corporate clients can expect greater demands for data and transparency around their emissions.

Backwash against “greenwashing”

As standards and regulations become clearer, more companies will see their green credentials come under scrutiny. Carbon neutral, climate neutral and green will become terms to be avoided. Any claims about sustainability will need to be specific and supported by data. While travel programs and suppliers will have to clearly demonstrate their progress, any claims made about carbon neutral travel will be met with skepticism.

Sustainable procurement

As we approach 2030, pressure will grow on customers to encourage their suppliers to adopt sustainable practices, including measurement and reporting. In travel, the Global Business Travel Association is helping companies ask the right questions of their travel suppliers and analyze their responses.

Think biodiversity, not just climate

Climate change is integral to an emerging biodiversity crisis. Travel must think beyond carbon to consider the wider impact of flights and hotel stays on nature in general. Such nature-based principles should also extend to the solutions for compensating for emissions.

Sustainable aviation fuel (SAF) takes off

As they ramp up their commitments to net zero, airlines are focusing heavily on SAF. Companies are increasingly investing in it to reduce the impact of their travel programs. But SAF's potential will remain limited, reflecting supply constraints and the amount of energy required to produce it.

More disruption, more resilience

As climate change results in more frequent floods, wildfires, extreme heat, etc., travel will become more unpredictable, increasing pressure on both suppliers and travelers to act. TMCs will be increasingly called on to build program resilience and provide traveler support when needed.

Sustainable hotel choices

Global hotel chains will increasingly strive to have their sustainability credentials certified by the likes of GreenKey, Green Globe and ISO. These schemes are starting to find common ground, and this will make it easier to compare hotels for their progress on sustainability.

Meaningful travel

After such a strong post-pandemic rebound, the value of travel will face scrutiny. Business travel will need to prove not only its economic benefits but be convincing about the force for good it represents for the wider community.



Legislation

A growing body of legislation worldwide is coming into force which requires companies to measure and report their carbon emissions, including their supply chain emissions and those related to business travel. Legislation is also homing in on supply chain due diligence. In some regions, particularly the EU, regulations require policies and targets to be in place, including for business travel. This will lead to a greater focus on methodologies to calculate emissions from travel, consistency in reporting emissions, and ways for companies to reduce their travel emissions – for example, by supporting travelers to make sustainable choices.

Here are some of the key regulations that will affect business travel:

- The [European Climate Law](#), adopted in 2021, requires European Union (EU) member states to reduce greenhouse gas emissions by at least 55% by 2030 and to achieve net-zero emissions by 2050, addressing the necessary steps to meet these targets. This has a significant impact on the travel sector, which is a major source of emissions.
- The EU's [Corporate Sustainability Reporting Directive](#) (CSRD) came into force in January 2023, expanding the scope of existing corporate sustainability reporting. According to the new requirements, qualifying companies must set emissions targets and report progress disclosing data on their sustainability due diligence and negative effects of their operations. Upon implementation, travel suppliers and their corporate clients can expect greater demands for data and transparency around their emissions. Beyond the EU, Australia, the U.K. and California have also proposed legislation on corporate reporting.
- The European Commission's [Fit for 55](#) set of legislative reforms intend to revise current legislation and put in place new initiatives to achieve the objectives of the European Climate Law. The most impactful reforms for the travel sector are:
 - **The RefuelEU Aviation initiative** stipulates that all fuel made available to aircraft operators at EU airports contains a minimum share of SAF: 2% by 2025, 6% by 2030 and 70% by 2050. It also sets a minimum share of synthetic fuels from 2030. The new regulation was adopted in October 2023.

- **Emissions Trading System** provides certain sectors with capped emissions allowances, for which they must usually pay. Currently, 35% of CO₂ allowances distributed to airlines are free, but from 2026, airlines will no longer receive free allowances and full auctioning will be implemented. The revision was adopted in April 2023.
- **The Energy Taxation Directive's** revision advocates for ending aviation fuel's long-standing exemption from taxation. The minimum tax rate would be raised progressively over ten years, while sustainable fuels would continue to be zero-rated. The proposal is currently under discussion.
- The European Commission regularly works on new sustainability initiatives including:
 - [CountEmissions EU](#) sets out a framework to calculate and report transport-related emissions, thus, contributing to consistent reporting and data exchange between different parties.
 - The [Green Claims Directive](#) is the legislation against greenwashing. Companies making unjustified environmental claims, such as carbon neutrality, may be monitored and penalized. This way consumers will be able to make better informed choices.
 - Proposed [Corporate Sustainability Due Diligence Directive](#), if adopted, will require companies to establish due diligence procedures to address the impact of their actions on human rights and the environment, including along their value chains worldwide.
- In Germany, the adopted [Supply Chain Due Diligence Act](#), effective Jan. 1, 2023, aims to foster sustainable corporate behavior. These regulations set suppliers' obligations around environmental safety and require companies to establish due diligence within an organization and across their value chain.
- The U.S. [Climate Action Plan](#) announced in 2021 establishes priority actions of the government to strengthen climate resilience, including reducing greenhouse gas emissions and investing in clean energy technologies. Among the points relevant to the travel sector, it mentions supporting the development of sustainable aviation fuels and promoting the use of public transportation. The Securities and Exchange Commission (SEC) will report later this year on its climate reporting requirements.
- Other legislation planned or in place around the world includes:
 - [Australia](#): Mandatory climate reporting for companies and financial institutions is under consultation and set to be introduced in 2024.
 - [United Kingdom](#): Mandatory climate-related financial disclosures required from 2022.
 - [Singapore](#): Mandatory sustainability reporting in place for all listed companies on a "comply or explain" basis from 2022, with reporting requirements being phased in for specific sectors in 2023 and 2024.
- Besides mandatory laws and regulations issued by governments and international organizations, there are optional initiatives that provide companies with guidance and tools on the way to more sustainable operations. More companies are joining the [Science Based Targets initiative \(SBTi\)](#) which has developed the global standard for climate target setting in line with Paris Agreement sustainability goals. They commit to greenhouse gas emissions reduction and set SBTs according to predefined criteria, that may include specific targets for business travel. The organizations with high sustainability commitments lead by example, setting ambitious goals for their own operations, as well as those of their supply chain.





Summary

Sustainability is becoming a necessary condition for doing business. Yet, many organizations could do more when it comes to sustainable business travel, as our research shows.

While 82% of companies have sustainability goals in place, only 45% have targets for sustainable business travel. Furthermore, only 20% of business travelers are aware of their company's sustainable travel goals.

Travelers' lack of knowledge of their company's sustainability agenda is a consequence of weak communication from both internal sustainability teams and travel departments.

There's a pronounced regional split in the way travelers approach sustainability: North America is behind Europe, Middle East, Africa and Asia Pacific when it comes to their awareness of the topic. Traveler behavior on the road differs too, just as the sustainable practices promoted by employers.

To fill in the existing gaps, companies need to incorporate sustainability into all internal processes. Employers will benefit from updating travel policies with sustainability in mind, boosting traveler communication and increasing employee engagement with the sustainable travel program, and doing this consistently and on a global scale.





Methodology

The study results are based on survey responses from 112 travel buyers and 1,789 business travelers globally on their views on environmental sustainability and travel. With the help of travel buyers, we explored sustainability's place in a travel program and examined travel management's role in promoting sustainable travel. Surveying business travelers provided insights into their attitudes, motivations and behaviors towards sustainable travel. The two surveys were conducted in July 2023.

Respondent profile



Travel buyers:

- Type of travel program: 69% global, 17% regional, 13% local.
- Geography: 47% EMEA (Germany, U.K., Netherlands, France, Poland, Switzerland, Belgium), 39% NORAM (U.S., Canada), 9% LATAM (Mexico, Brazil), 5% APAC (Singapore, Philippines).
- Industries: 20% manufacturing, 10% life sciences, 8% financial services, 6% media and communication, 6% information technology, 6% professional services, 6% aerospace and defense.
- 57% work for companies with more than 10,000 employees, while 10% are employed by organizations with fewer than 1,000 employees.



Travelers:

- At least one business trip taken in the past 12 months.
- Geography: 70% NORAM (U.S., Canada), 17% EMEA (U.K., Switzerland, Germany, Ireland, Belgium, Netherlands, Romania, South Africa, UAE), 12% APAC (India, Indonesia, Australia, Malaysia, Singapore, Thailand), 1% LATAM (Mexico, Brazil).
- Gender: 34% female, 65% male, 1% other.
- Age: 46% Generation X, 38% Baby Boomers, and 16% Millennials.
- Industries: 23% life sciences, 18% manufacturing, 12% aerospace and defense, 6% financial services, 5% information technology, 5% professional services.
- Company size: 74% of business travelers are employed by companies with 10,000 employees or more.



How BCD supports clients in their sustainable travel programs

BCD has been at the forefront of sustainable business travel for several years, providing our customers with sustainable travel solutions such as carbon reporting, point-of-sale emissions information, carbon offsetting partners and sustainability features that help travelers make more sustainable choices.



Measure, track and report: Our [DecisionSource](#) intelligence platform provides comprehensive data and reporting capabilities on air, hotel, rail and car CO₂ emissions.



Inform: We help you raise awareness of sustainable options amongst your travelers through:

- Sustainability policy guidelines that can be integrated into travel policy documentation via [TripSource's](#) Travel Program feature.
- Air CO₂ emissions and eco-hotel indicators included at point-of-sale in TripSource, as well as an EV charging station hotel filter.
- Flight and hotel emissions calculations available on itineraries.
- Traveler engagement at the point-of-sale to encourage sustainable travel choices via [BCD's marketplace](#) partner Lumo.
- Integration of push messaging to influence sustainable practices, such as taking public transport to the airport or using a shuttle to the hotel.
- Inclusion of sustainability in traveler feedback via experience polls.



Manage: Through Advito's world leading [Sustainable Collaboration practice](#), we develop strategies to manage and reduce emissions, and other environmental impacts such as water consumption.

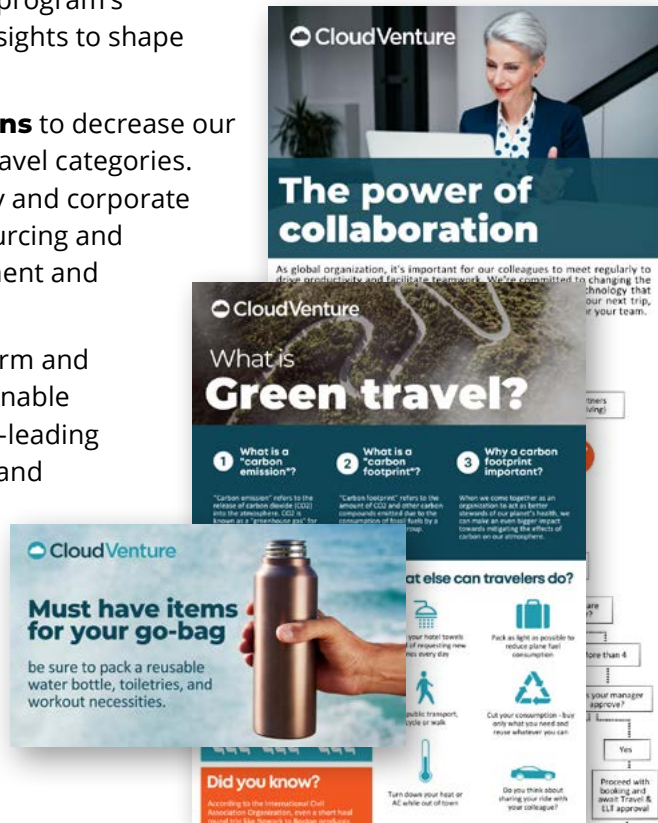


Contribute: We help invest in high quality nature-based solutions and carbon credits via [BCD's marketplace](#) partners goodcarbon and Climate Neutral Group.

Sustainable Collaboration practice

For those clients who are looking to take a more in-depth approach to sustainable business travel, our industry-leading [Sustainable Collaboration practice](#) at Advito offers a robust strategy, helping clients take real action towards achieving their carbon reduction goals. Fully aligned with the latest scientific recommendations, our solution is built on three main pillars:

- **Business intelligence** designed to bring data to life by tracking, measuring and reporting on carbon emissions using our ISO-certified GATE4 methodology, offering a holistic view of a travel program’s carbon footprint and providing insights to shape sustainability goals and initiatives
- **Strategy and recommendations** to decrease our clients’ CO₂ emissions across all travel categories. Our expertise spans sustainability and corporate travel programs from supplier sourcing and management to traveler engagement and policy
- **Employee engagement** to inform and influence behavior towards sustainable choices, using advanced, industry-leading digital marketing, merchandising and communication strategies that also improve overall satisfaction and user experience



Industry-leading travel emissions methodology



We help our clients create a data-driven strategy with our advanced business intelligence and proprietary carbon emissions calculation methodology – [GATE4](#). It’s certified under the ISO 14000 series – the world’s most widely recognized environmental management standard. This means our emissions reporting figures can be included in annual financial reporting as recognized carbon calculations and can be used to create science-based sustainability targets. It’s the only ISO-certified methodology designed for business travel.

GATE4 accounts for multiple factors not included in standard reporting, such as country-level electricity mix, carbon intensity, passenger to freight ratios, aircraft type, radiative forcing, hotel eco-labels, amenities and more. The methodology powers our GATE4 Insights dashboard, allowing customers to:

- Visualize emissions trends across air, hotel, rail and car
- Drill down to assess key KPIs
- Track progress versus short-term goals and long-term targets
- Identify share-shift opportunities
- Build data-driven traveler messaging

SUCCESS STORY

Find out how Advito has supported a client with the sustainability needs

▶ LINKEDIN SETS INTERNAL CARBON PRICE FOR BUSINESS TRAVEL

Share your thoughts

Do you have questions or comments regarding this report?
Please email Natalia.Tretyakevich to share your thoughts.



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