

TRAVEL BUYER SURVEY:

SUSTAINABILITY

BY BCD TRAVEL RESEARCH & INTELLIGENCE

September 2023

ABJ 1,822 (-33)	HJ 20,369 (-580)	WV 6,333 (-20)	FL 6,333 (-200)	FJR 19,985 (+580)	SPT 285 (-1)	DF 4,888 (+1)
MBC 3,605 (+218)	LH 9,542 (-128)	MJ 2,609 (+38)	PN 7,654 (+169)	NFR 6,522 (+122)	LGH 1,638 (-34)	OM 3,812 (+148)
YV 3,204 (-33)	GM 5,211 (+156)	MM 7,100 (-40)	BT 7,886 (-34)	KLM 782 (+34)	CC 1,991 (+101)	EM 3,280 (-128)
MS 3,320 (-128)	WFF 712 (+12)	HUM 134 (+8)	2,022 (+8)	LSD 631 (+44)	SBI 4,287 (-97)	BHS 12,630 (+338)

ABOUT THE SURVEY

This survey explores the place environmental sustainability has in a travel program and looks at the role travel management should play in promoting sustainable travel.

The results are based on an online survey of **112 travel buyers** conducted from July 11-23, 2023.

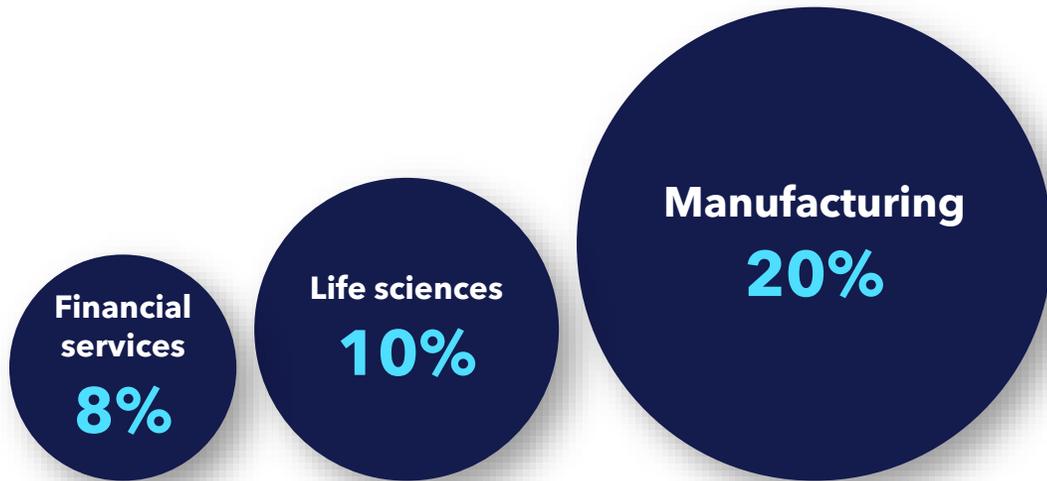
[Respondent profile](#)

[Importance of sustainability](#)

[Sustainable travel program](#)

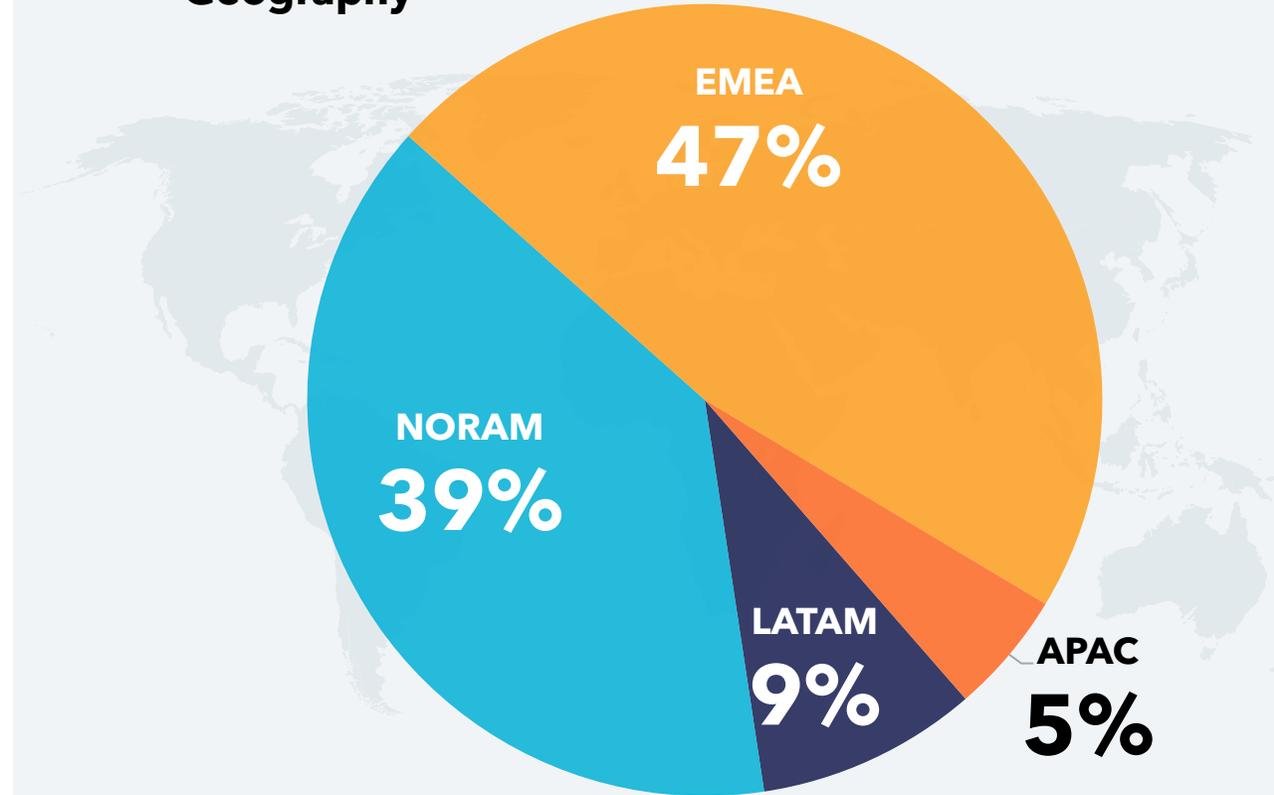
Respondent profile

Top three industries



69% of travel buyers work for companies with more than 5,000 employees

Geography



55% of travel buyers have global program responsibilities

Importance of sustainability

[Sustainability as a travel program priority](#)

[Stakeholders' sustainability efforts](#)

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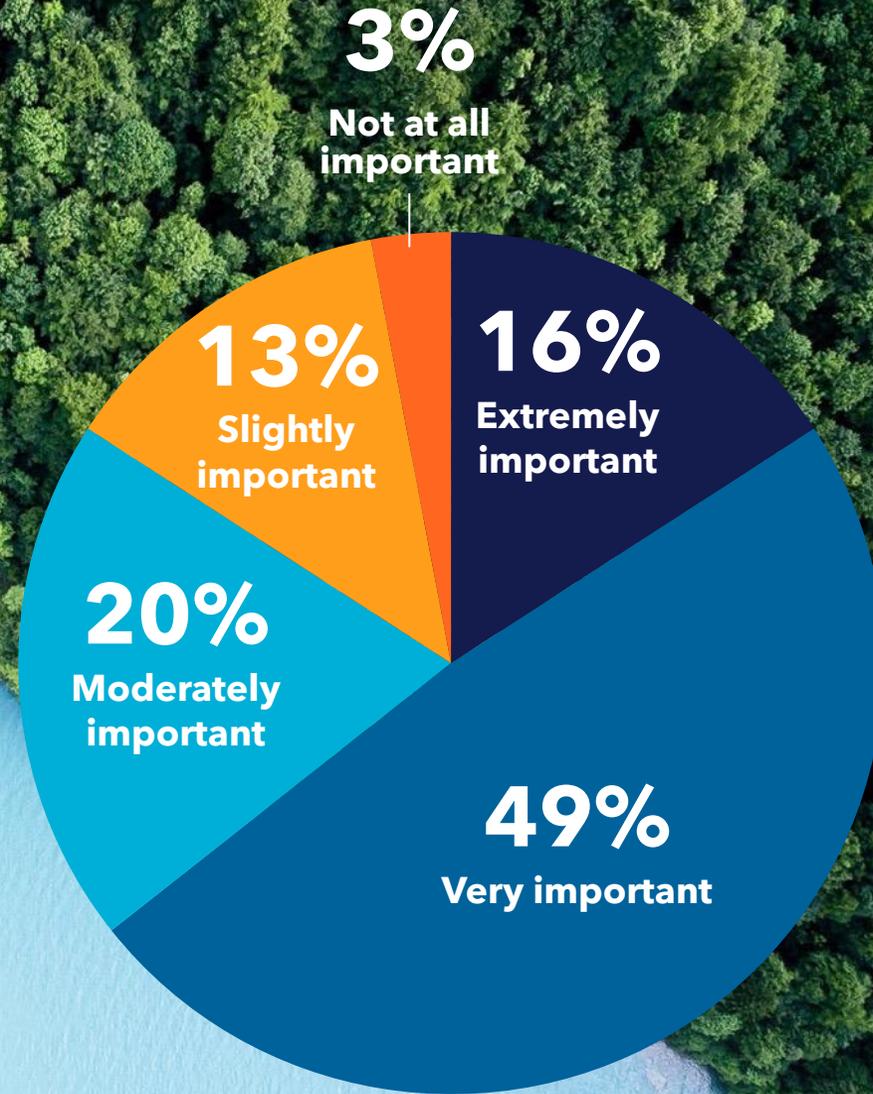
[Benefits of a sustainable travel program](#)

[Challenges of a sustainable travel program](#)



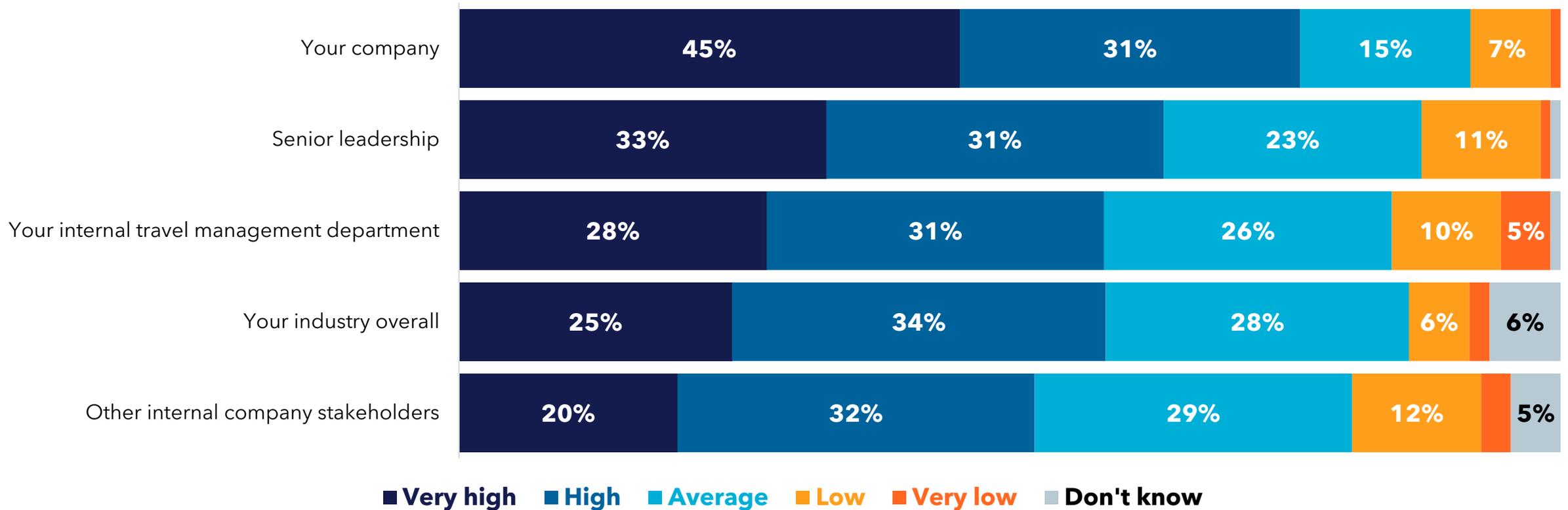
Sustainability as a travel program priority

Two thirds of travel buyers rate environmentally sustainable travel as extremely or very important.



Stakeholders' sustainability efforts

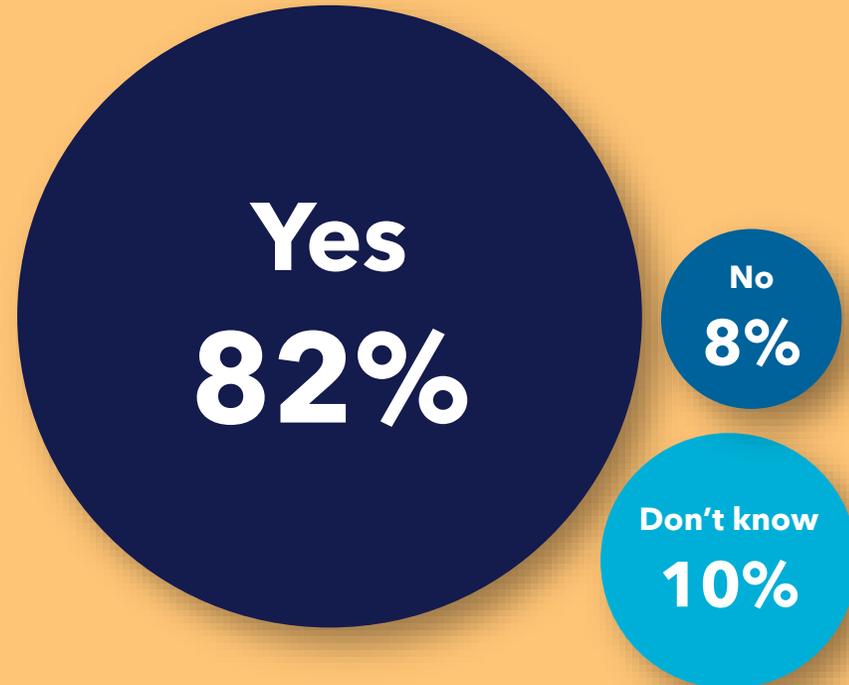
Travel buyers identify their companies and senior leaders as the stakeholders paying the most attention to sustainability. 6 in 10 provide high ratings to the sustainability efforts of internal travel departments.



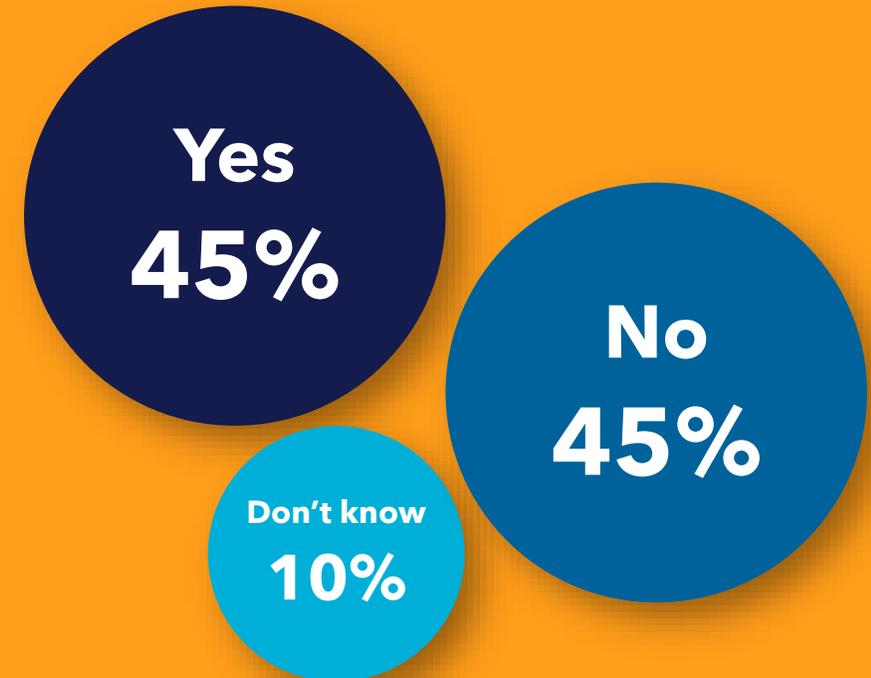
Company sustainability goals

While 8 in 10 travel buyers confirm availability of published sustainability goals in their organizations, less than half have sustainable *travel* goals in place.

Sustainability goals

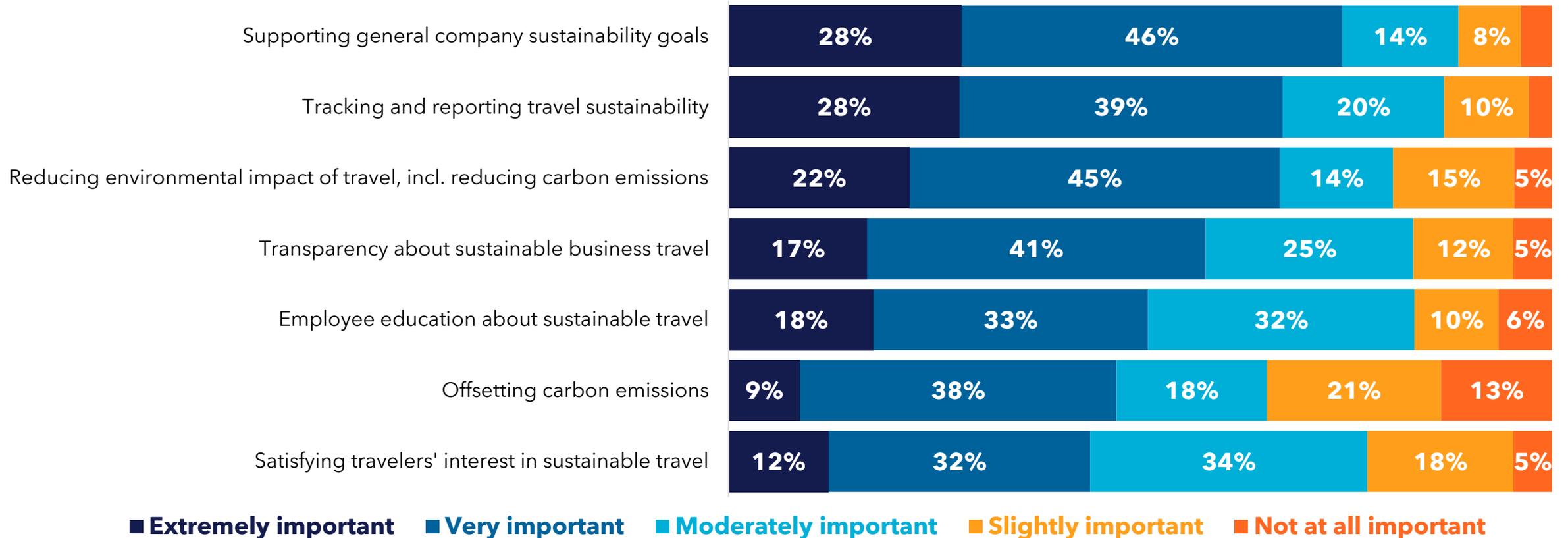


Sustainability goals related to travel



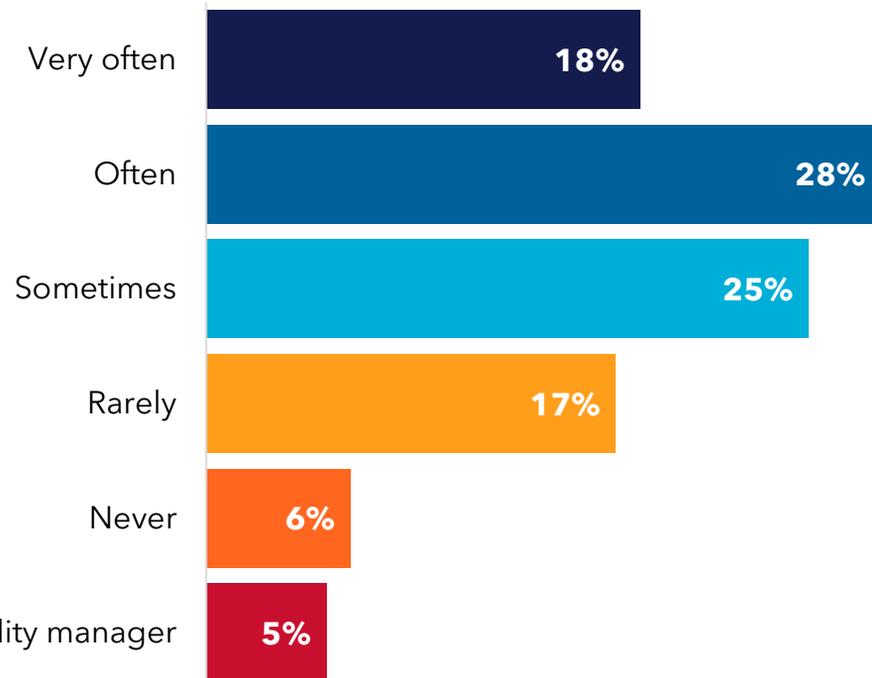
Sustainable travel priorities

Supporting company goals, tracking travel sustainability and reducing the impact of business travel are among the top-three sustainability priorities related to travel: Over two-thirds rate them as extremely or very important.



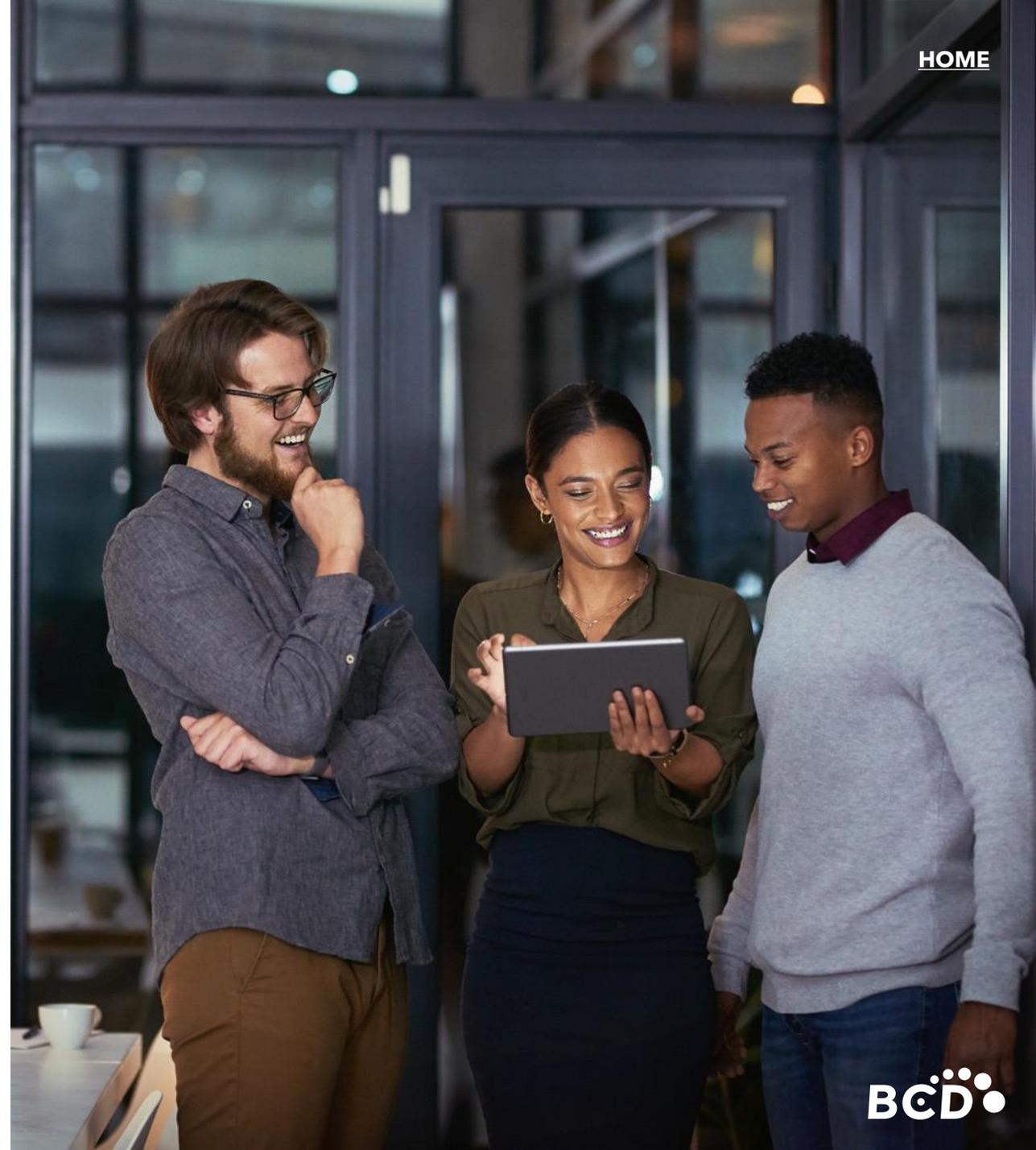
Interaction with the sustainability team

When working on their sustainability agenda, 9 in 10 travel buyers talk to a company sustainability manager or a team. Half of them frequently do so.



No sustainability manager

5%



Benefits of a sustainable travel program

In addition to care for the environment, travel buyers see enhanced company reputation and personnel recruitment among the top benefits of a sustainable travel program.



Challenges of a sustainable travel program

The biggest pain point on the way to a sustainable program is the elevated cost of sustainable travel options: Over half say so. Among other challenges, travel buyers mention traveler education, lack of standard measurement and having access to the right tools.



Sustainable travel program

[Sustainable travel program](#)

[Sustainable travel options](#)

[Traveler communication](#)

[Educational material](#)

[Sustainable choices when booking / Incentives](#)

[Carbon emissions data / Carbon budgets](#)

[Sustainability features of OBTs](#)

[Carbon emissions offsets](#)

[Sustainable aviation fuel](#)

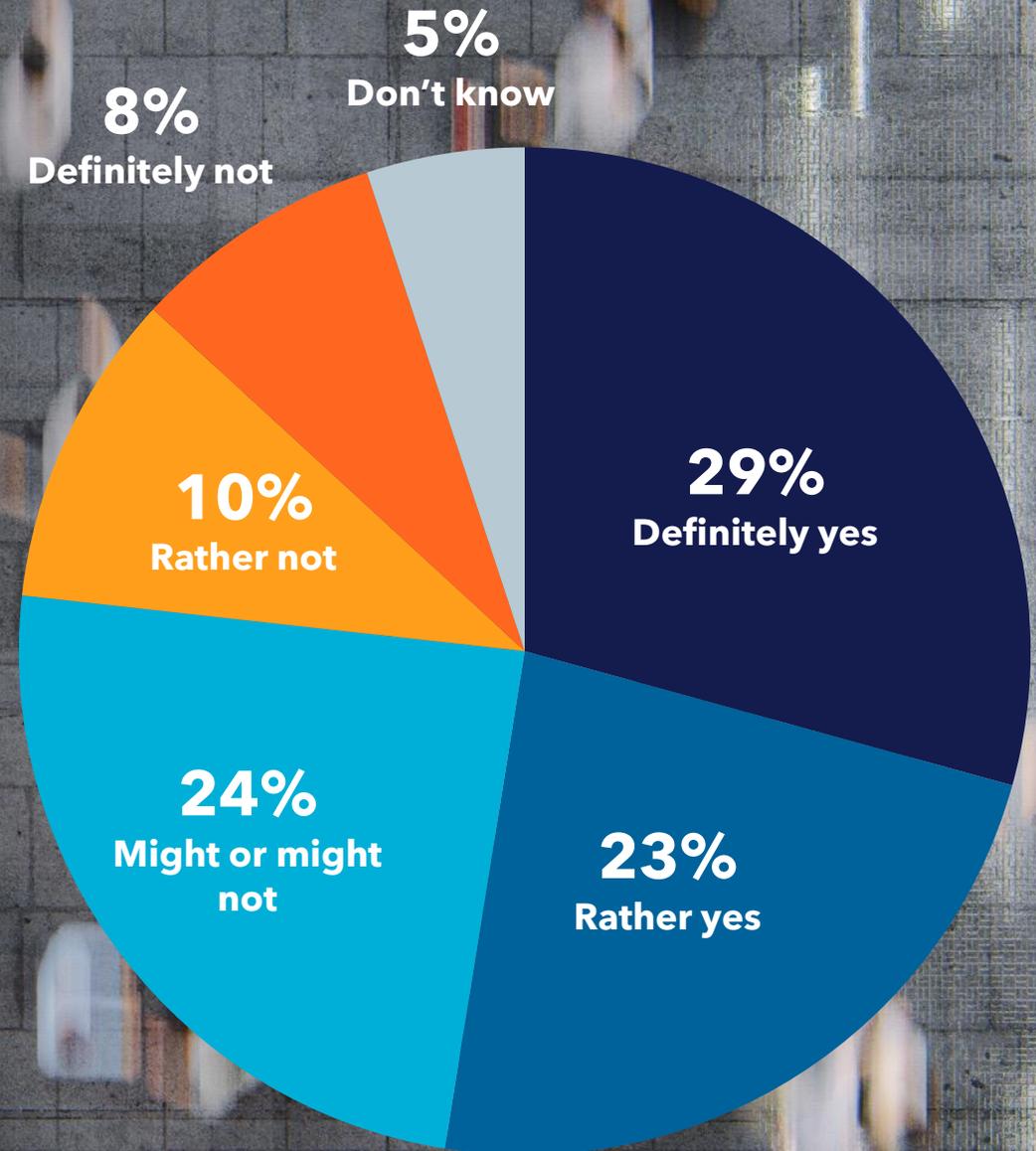
[Sustainability efforts of travel suppliers](#)

[Supplier selection](#)



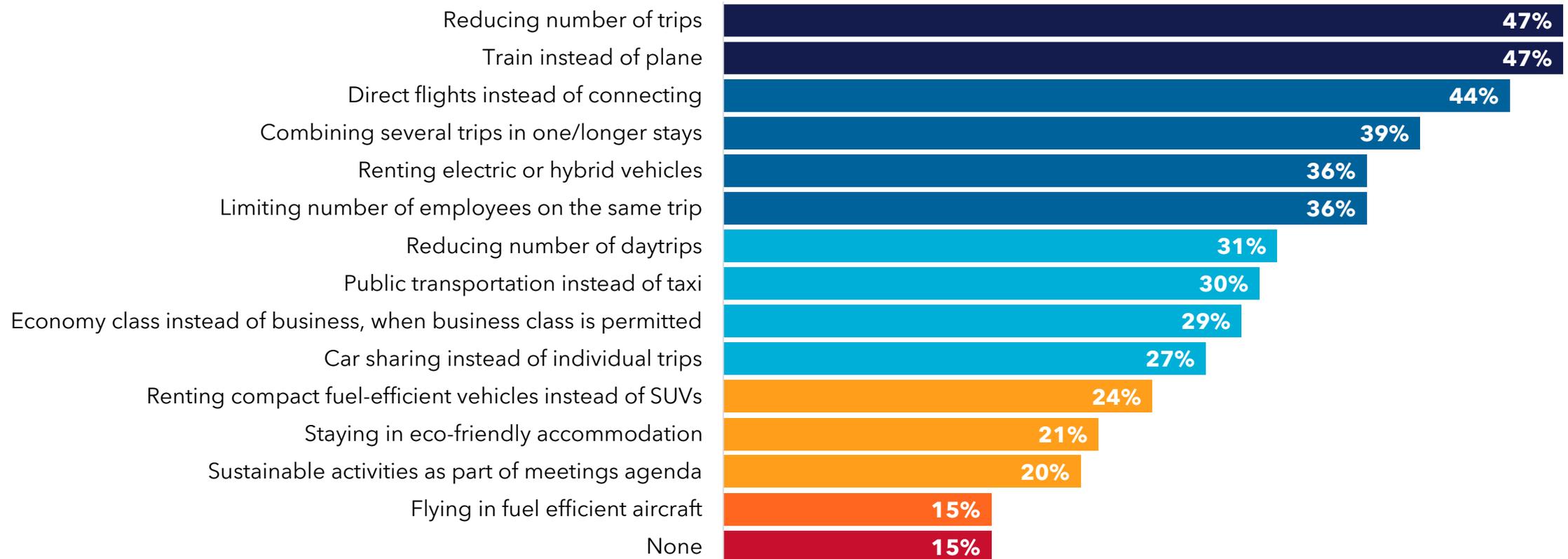
Sustainable travel program

Over half of travel buyers agree that their travel program encourages sustainable travel, while 18% say the opposite.



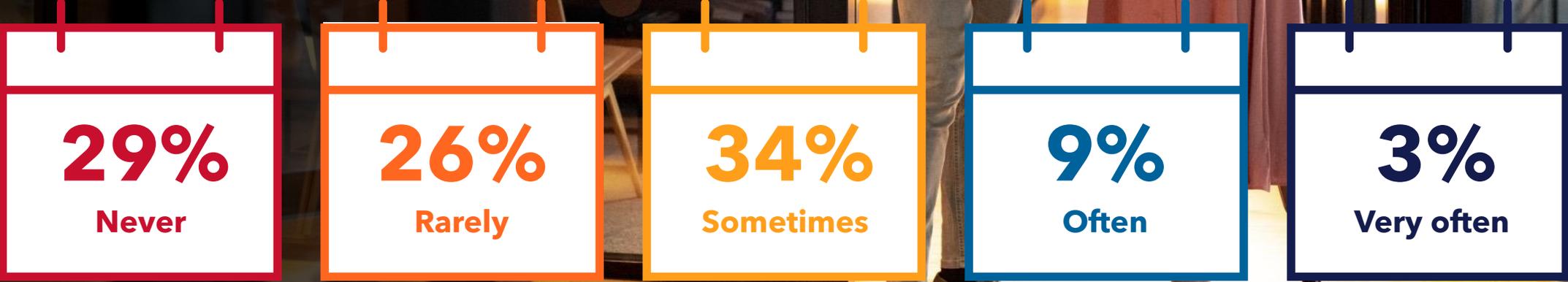
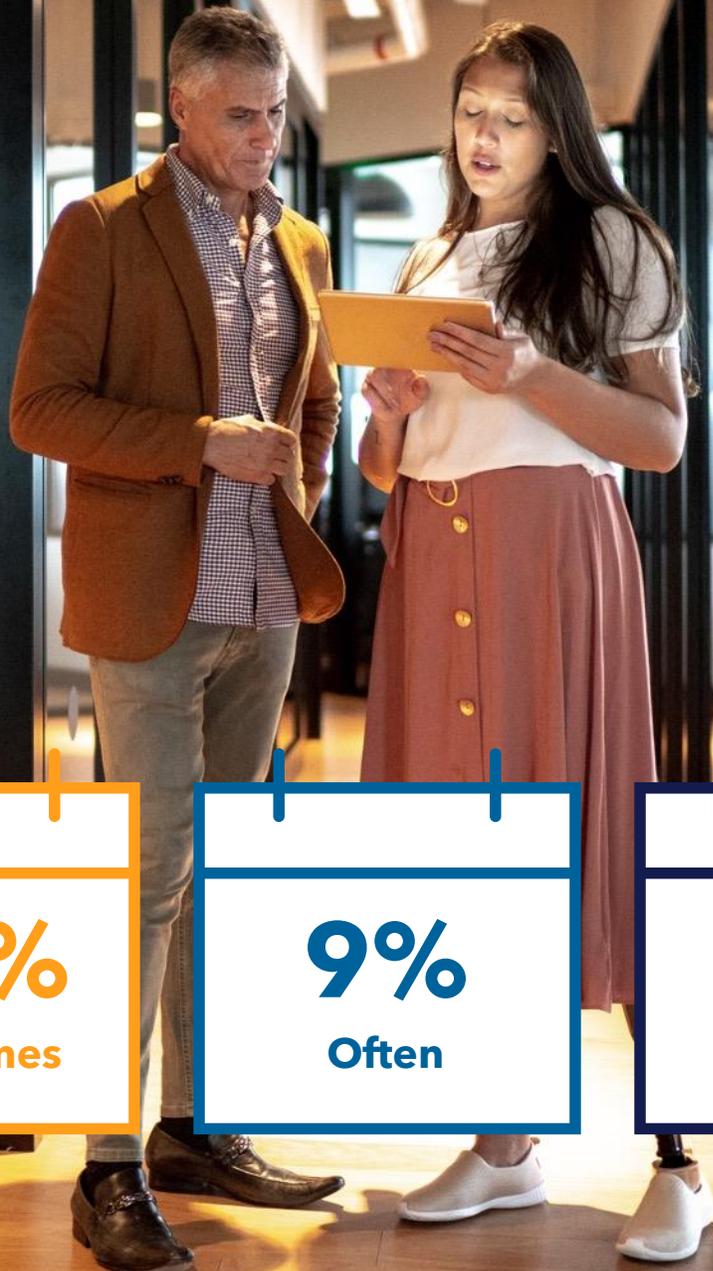
Sustainable travel options

In an attempt to make their travel programs sustainable, more companies reduce their travel volumes. This, along with travel by train, are the top sustainable travel options offered to travelers followed by using direct flights.



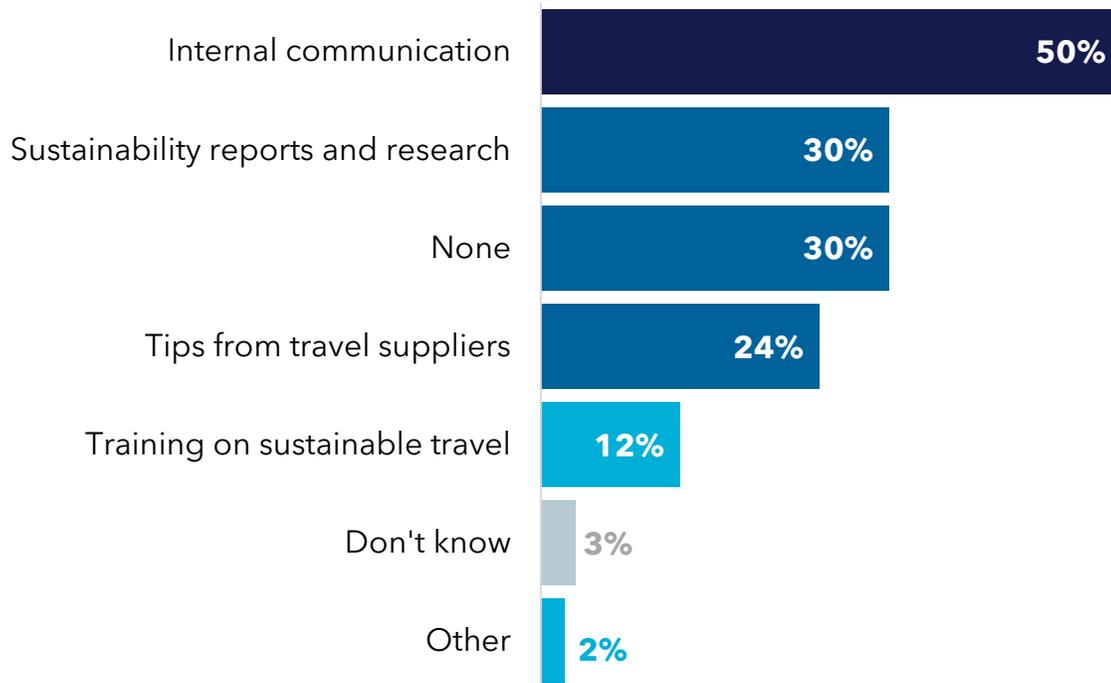
Traveler communication

Half of travel buyers find traveler education to be a challenge on the way to a sustainable travel program, yet 3 in 10 never communicate with travelers on sustainability matters.



Educational material

Of those travel buyers who talk to travelers about sustainability, half use emails, blogposts or articles on the company intranet as the means of communication. Training on sustainable travel isn't too popular.





Incentives for sustainable choices

Incentives for sustainable travel choices aren't typical in business travel.

2%

Yes

89%

No

9%

Don't know

Sustainable choices when booking

Despite the importance of sustainability, only a third of travel buyers encourage travelers to select sustainable options at the point of booking.

33%

Yes

61%

No

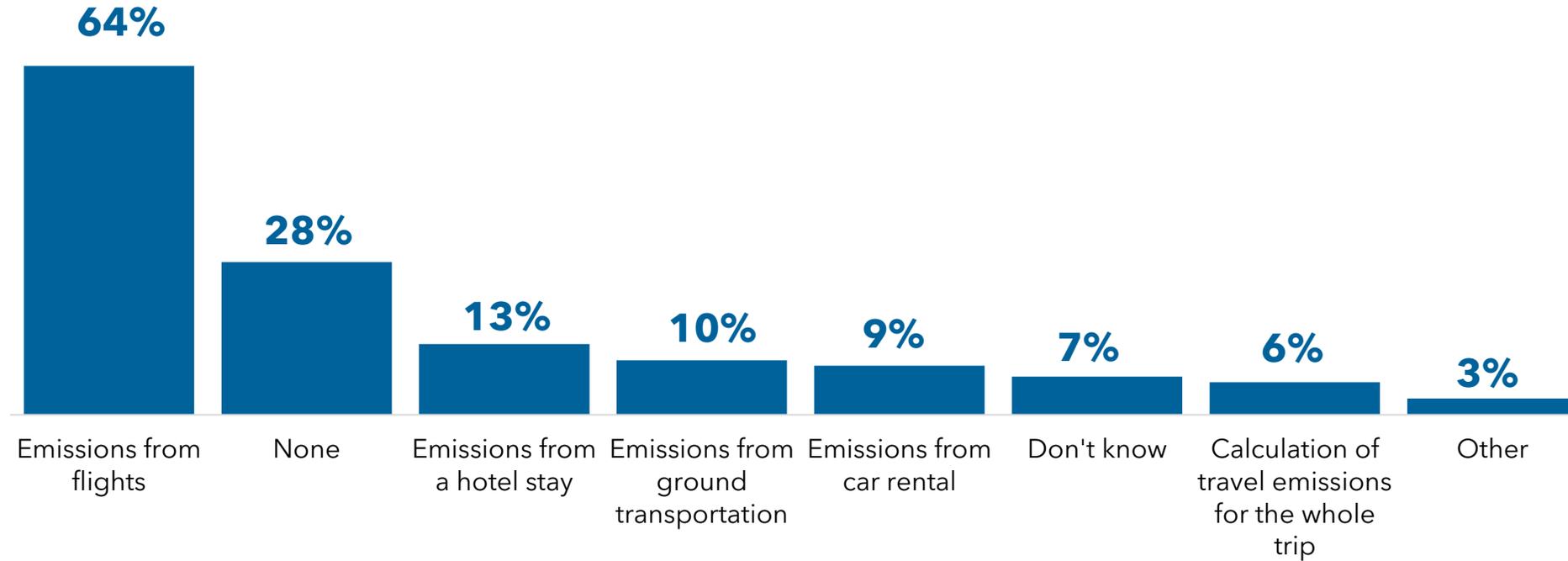
6%

Don't know



Carbon emissions data

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



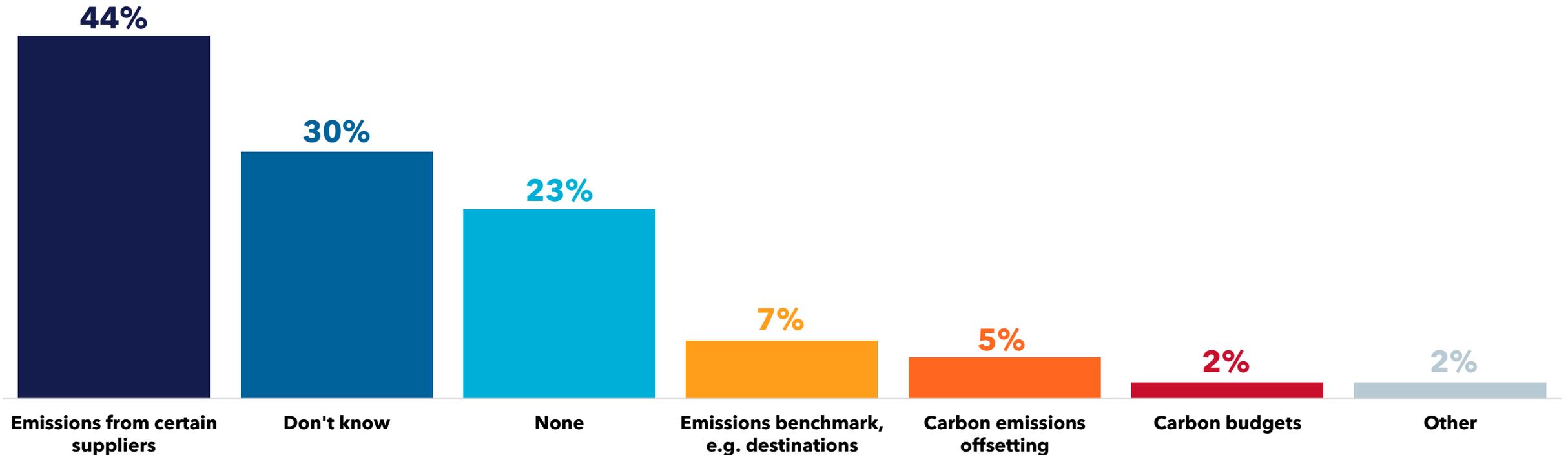
Carbon budgets

Setting carbon budgets for business trips isn't common: 9 in 10 don't do this.



Sustainability features of OBTs

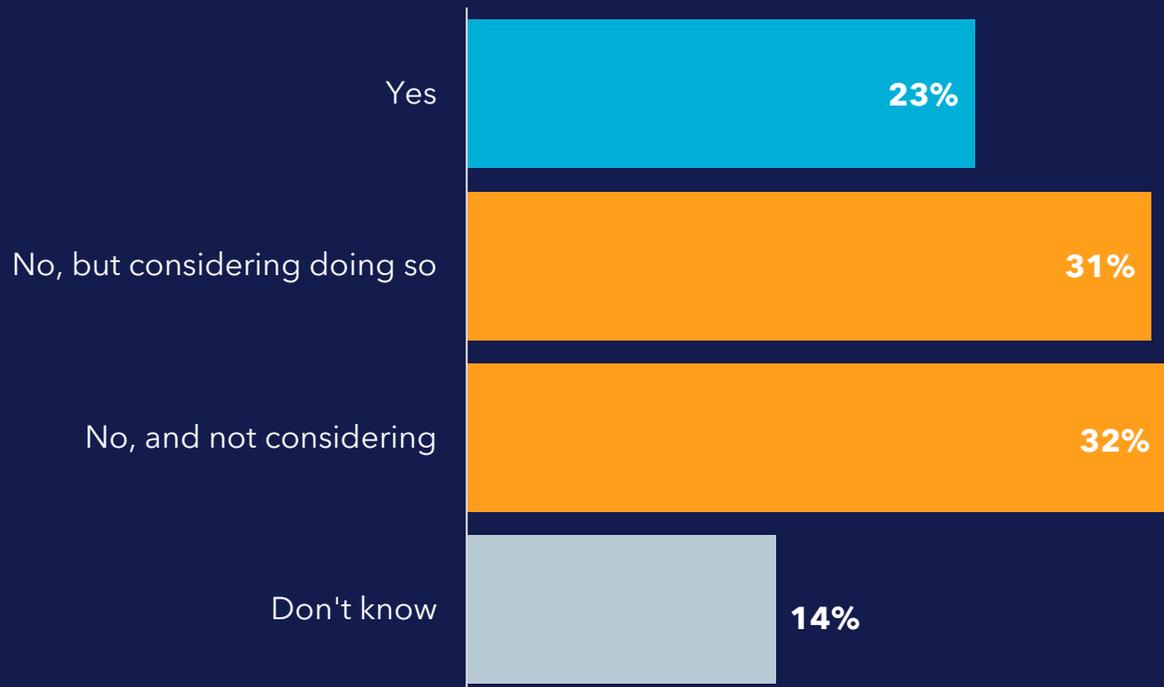
While around 4 in 10 of travel buyers report their online booking tool (OBT) has capabilities to show carbon emissions generated by certain suppliers, almost a quarter say their booking tool lacks sustainability related features.



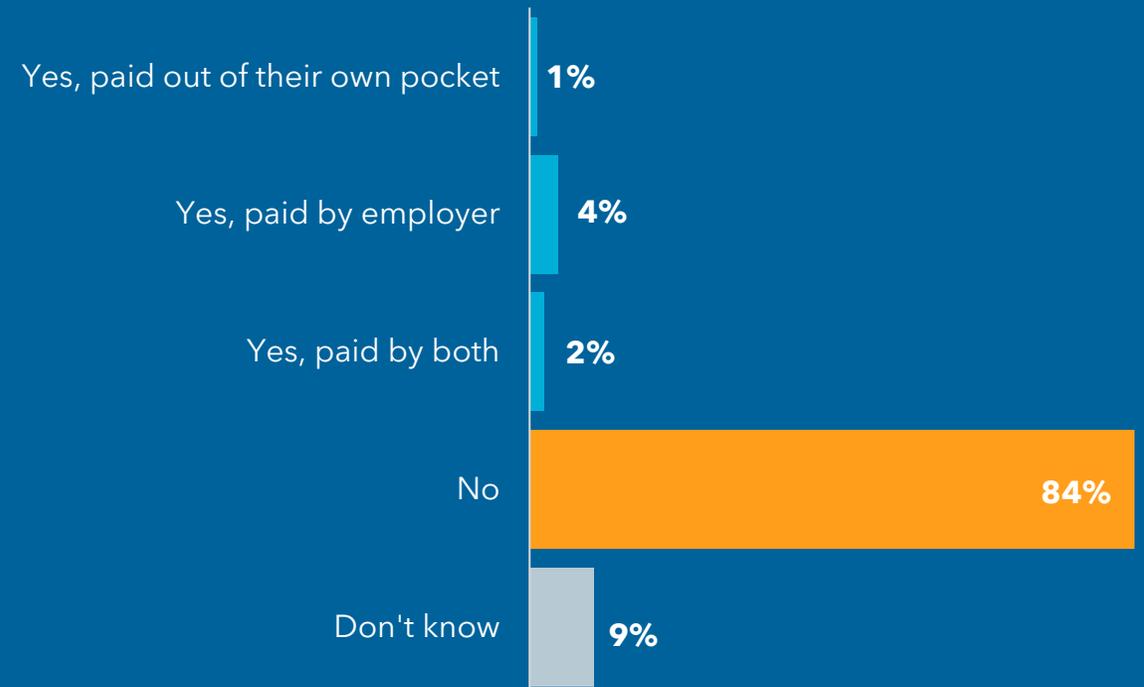
Carbon emissions offsets

Less than a quarter of travel buyers currently offset carbon emissions from travel and 3 in 10 consider doing so. The majority of companies do not provide travelers with a possibility to offset their emissions.

Offsets by employers

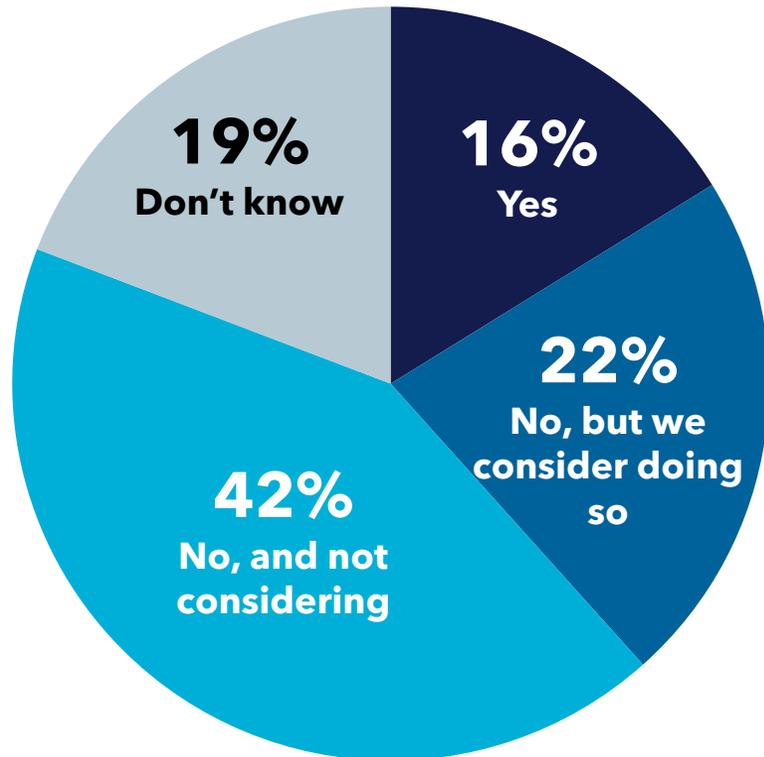


Offsets by travelers



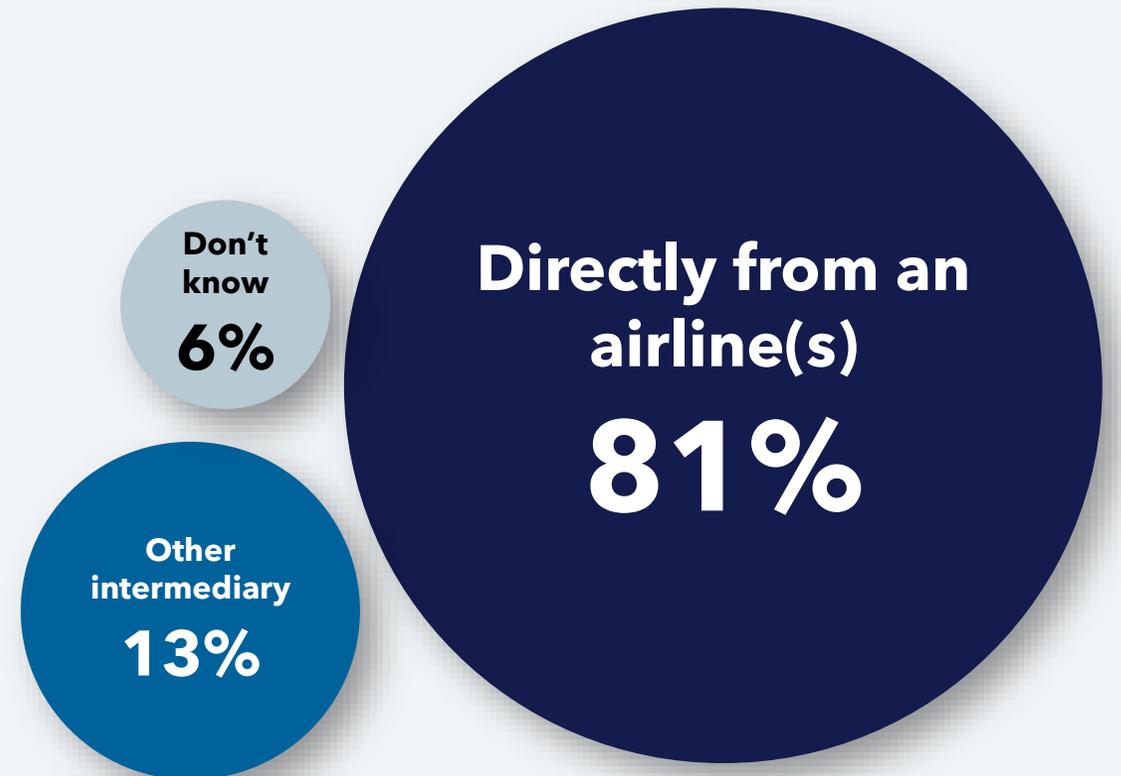
Purchase of sustainable aviation fuel (SAF)

Every sixth travel buyer report buying SAF and 22% more have this in plans.



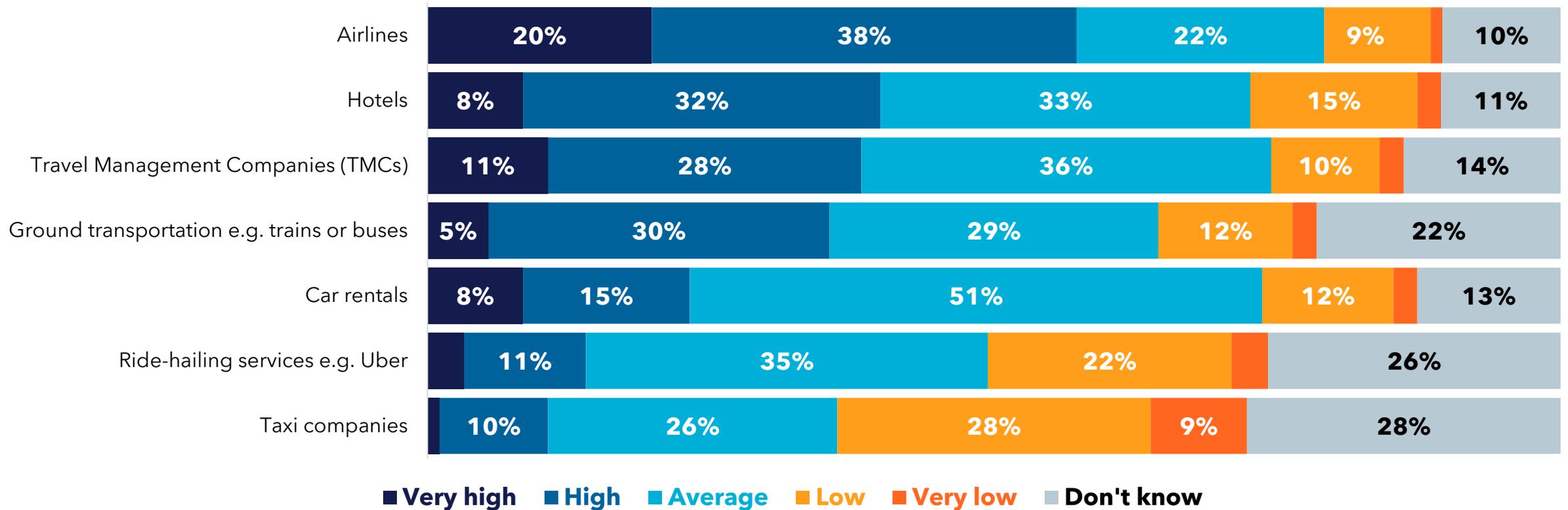
SAF vendors

Of those who purchase SAF, 8 in 10 buy it directly from airlines and 13% use intermediaries.



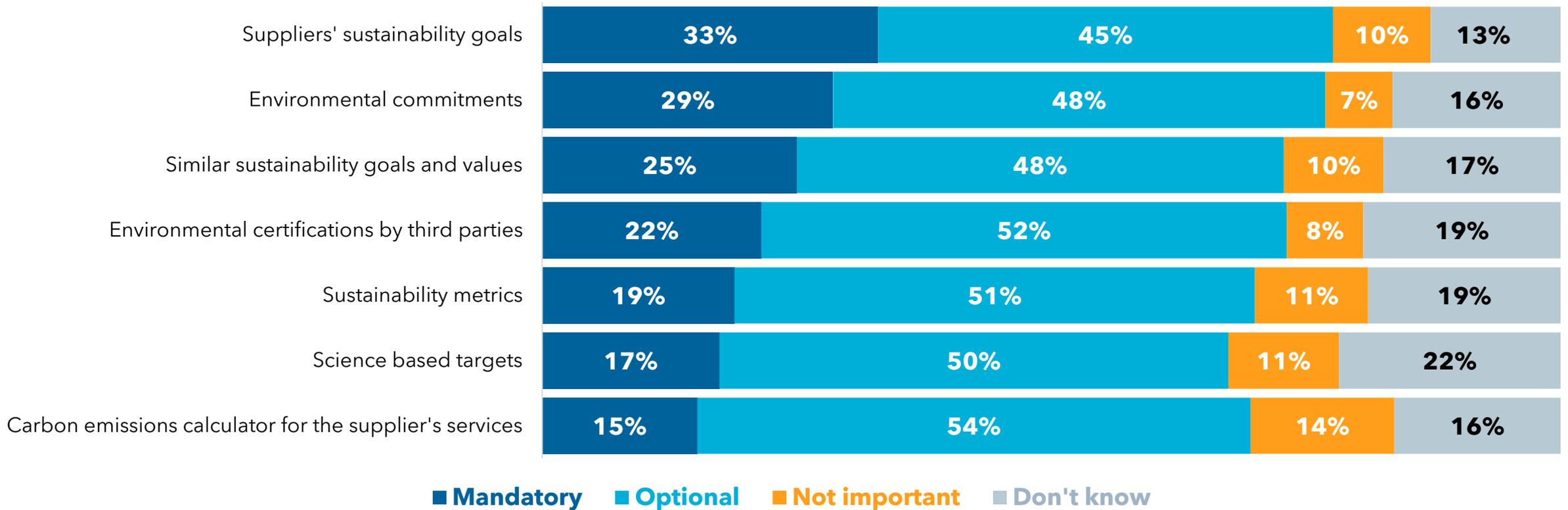
Sustainability efforts of travel suppliers

Travel buyers rate airlines' sustainability efforts as the highest out of the main travel suppliers: 6 in 10 evaluate them as very high or high. Airlines are followed by hotels and Travel Management Companies (TMCs) with 4 in 10 providing high ratings to their sustainability efforts.



Importance of sustainability for supplier selection

For many, sustainability tends to be outside the required criteria when it comes to selecting travel suppliers. 3 in 10 indicate suppliers' sustainability goals and commitments to be mandatory on the list of items they request.





Natalia Tretyakevich

Senior Manager, Research & Intelligence

Spain

natalia.tretyakevich@bcdtravel.eu

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