

SUSTAINABILITY: BUYERS SPEAK

BY BCD TRAVEL RESEARCH & INNOVATION

ABOUT THE SURVEY

Goal: With this survey we explore travel buyers' views around the place environmental sustainability has in a travel program and look at the role of travel management in promoting sustainable travel.

Methodology: The results are based on an online survey of 101 travel buyers conducted from April 6-26, 2021.

Respondent profile:



76% of travel managers have global responsibilities.



58% are based in North America and 31% are in EMEA.



Top three industries: Pharmaceutical (16%), Professional services and Consulting (14%) and Financial services (14%).



61% work for large companies with more than 10,000 employees.



In 2019, 44% had annual travel spend of US\$50 million and above.

➤ [Introduction to sustainable business travel](#)

➤ [Company sustainability](#)

➤ [Sustainable travel program](#)



Introduction to sustainable business travel

Travel program priorities

Increased interest in sustainable travel

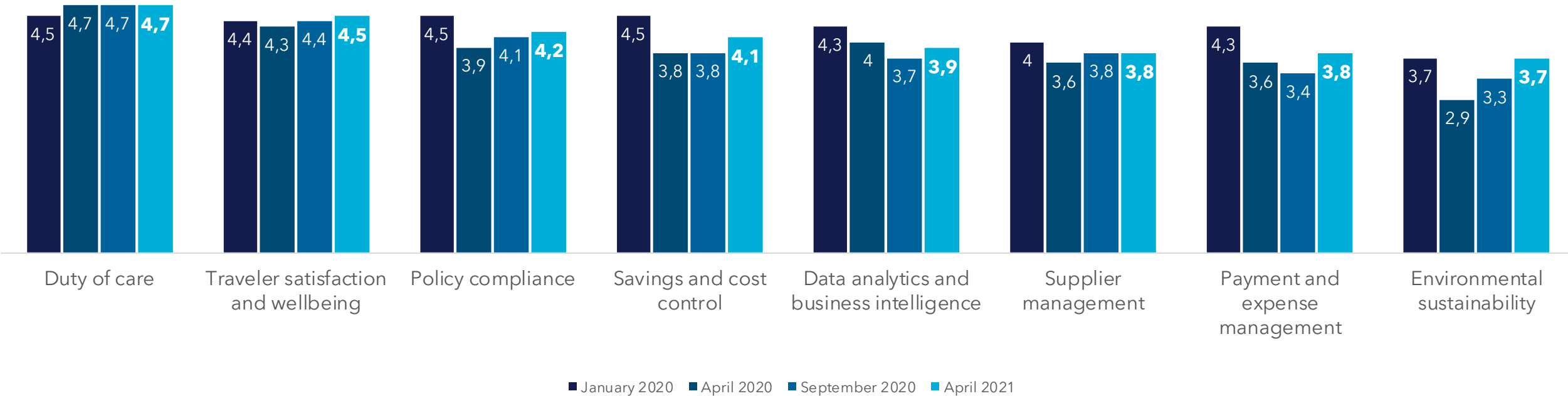
Sustainability efforts of travel suppliers

Sustainability efforts of other stakeholders

Travel program priorities

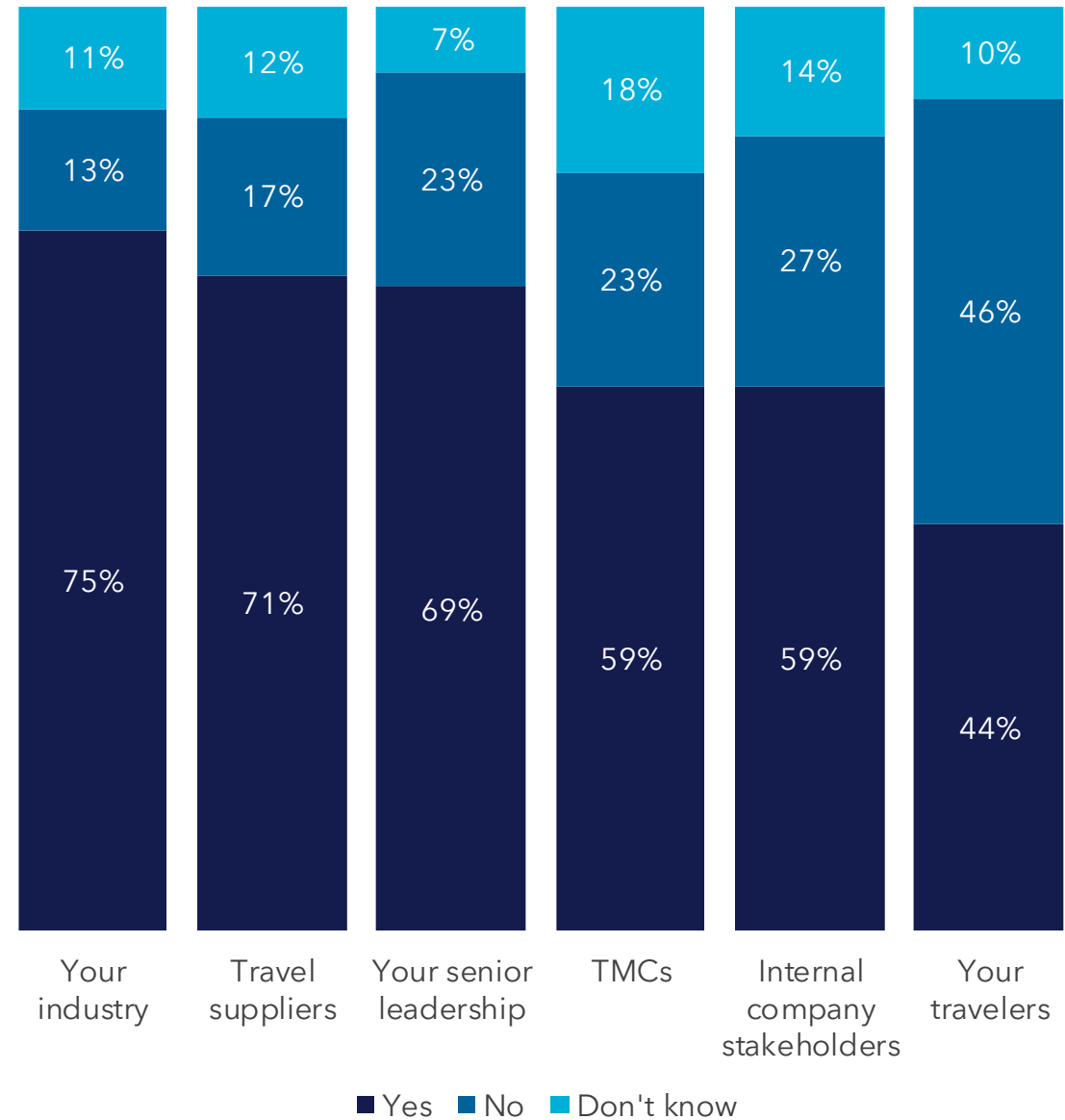
Duty of care and traveler satisfaction and wellbeing are the top two travel program priorities steadily leading the travel managers' ratings in 2020-2021. Most other priorities experienced dips and start gradually recovering. Only sustainability has returned to pre-pandemic levels.

Travel program priorities benchmark, 2020-2021



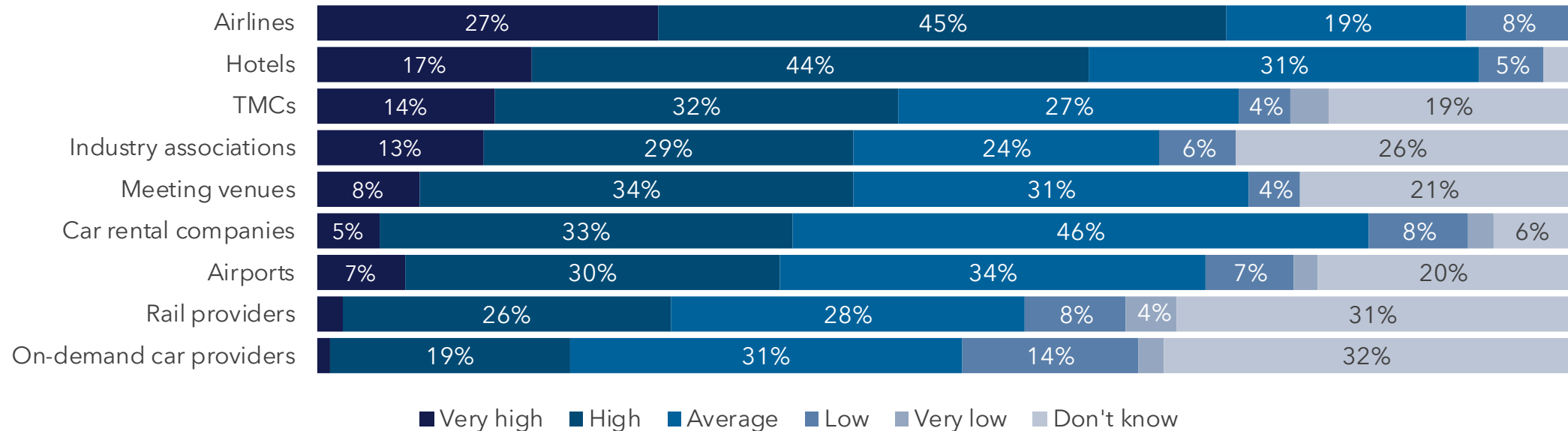
Increased interest in sustainable travel

In the past year, travel buyers have witnessed an increased interest in sustainable travel from various stakeholders, from travel suppliers to leadership. The views over travelers' attitudes to sustainability are divided.



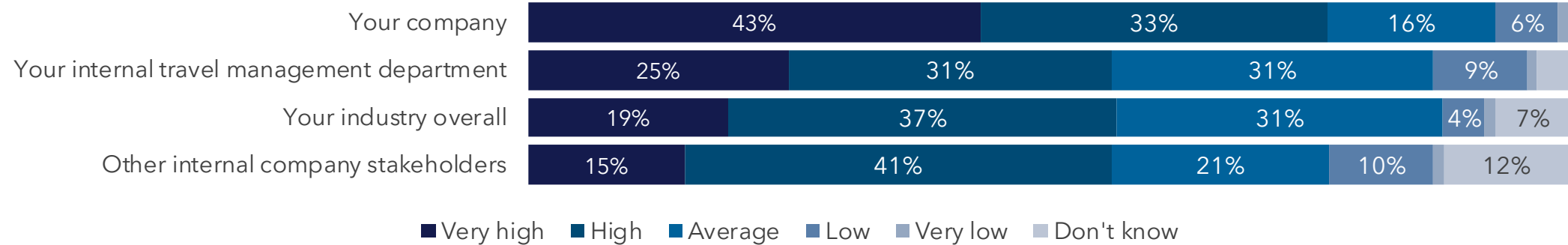
Sustainability efforts of travel suppliers

Travel buyers consider airlines and hotels as the travel suppliers making the most effort towards sustainability. Travel Management Companies (TMCs) are high on the list, though 1 in 5 respondents don't have visibility into their sustainability initiatives.



Sustainability efforts of other stakeholders

Three quarters of travel buyers rate their company's sustainability efforts as "very high" or "high". When compared to other internal stakeholders, travel departments tend to score slightly higher.





Company sustainability

[Sustainability priorities for 2021](#)

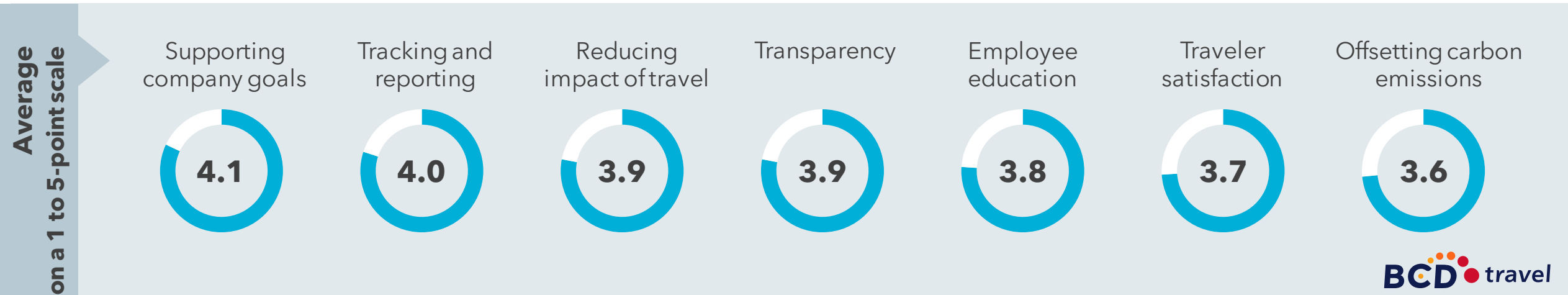
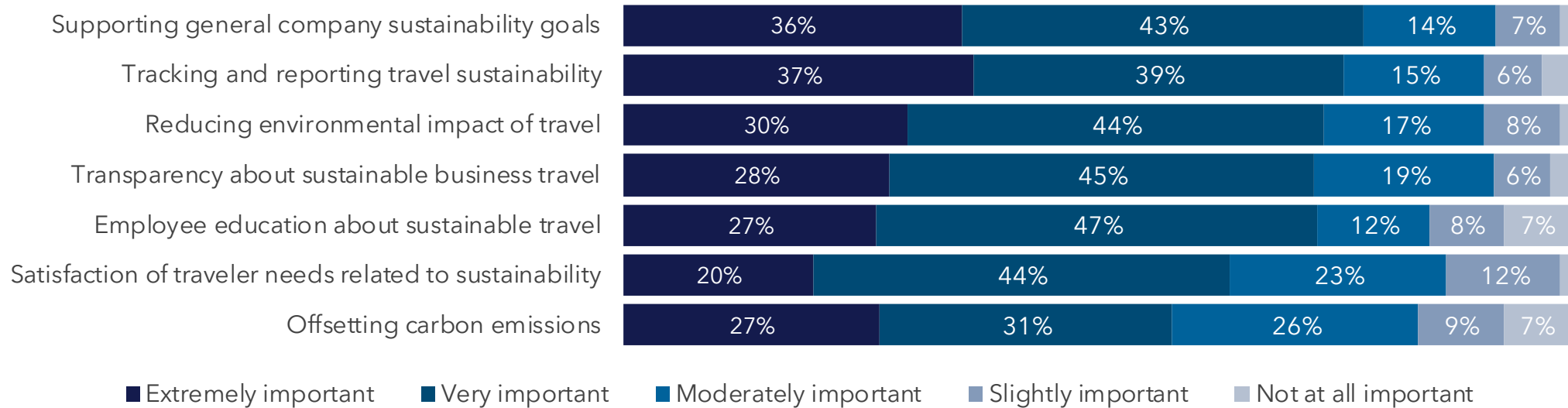
[Sustainability within the company](#)

[Sustainability report](#)

[Sustainable Development Goals](#)

Sustainability priorities for 2021

Travel buyers recognize their sustainability priorities must be aligned with general company sustainability goals.



Role of sustainability manager



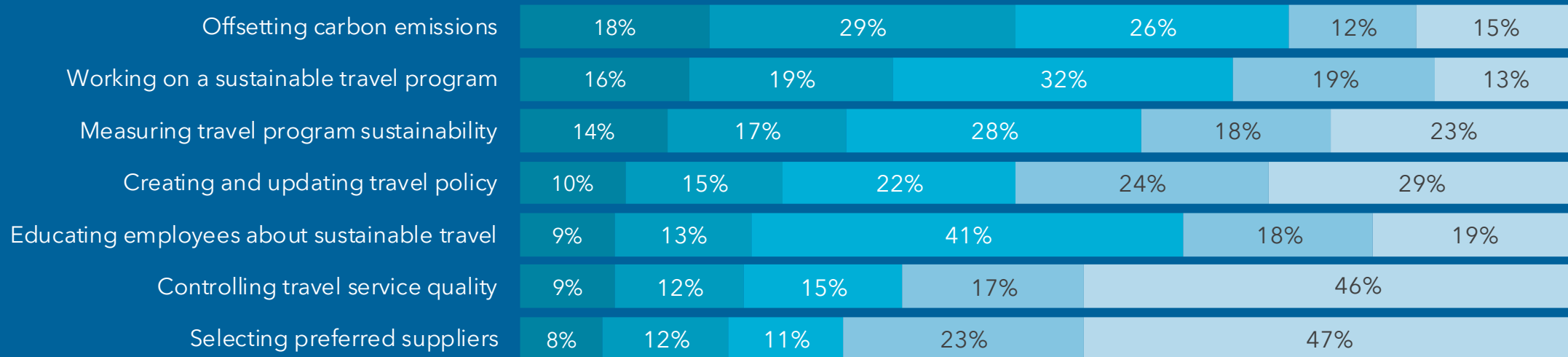
SUSTAINABILITY MANAGER/TEAM

Three quarters have a sustainability manager or a team in the company.



FREQUENCY OF INTERACTION

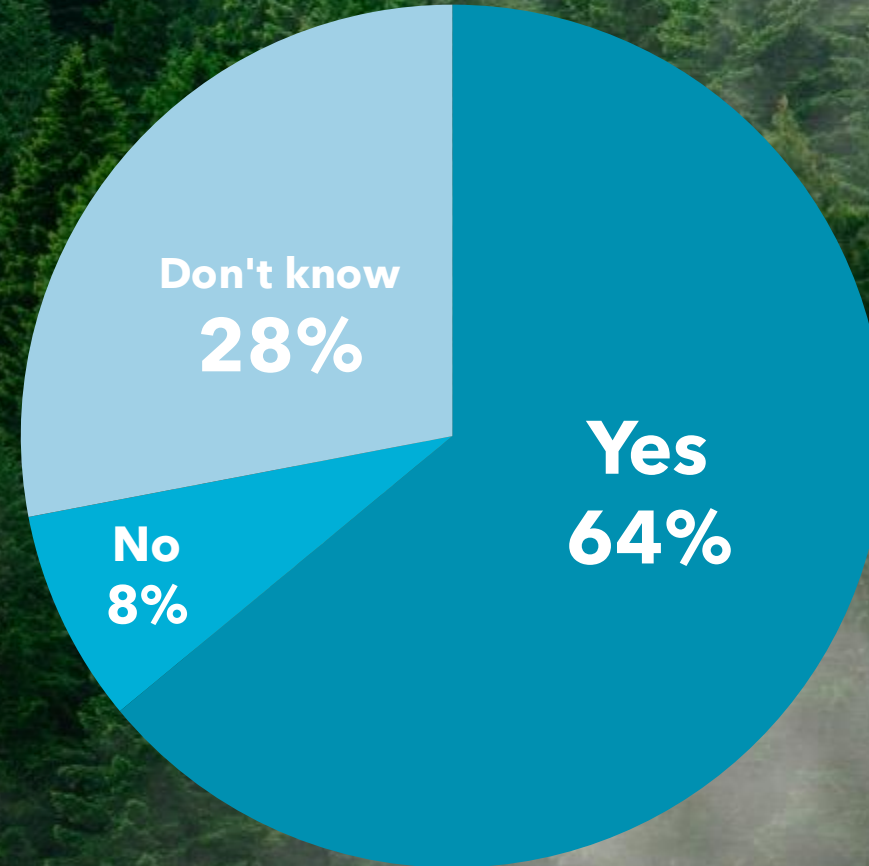
Of those, **40%** regularly interact with the sustainability manager.



■ Very often ■ Often ■ Sometimes ■ Rarely ■ Never

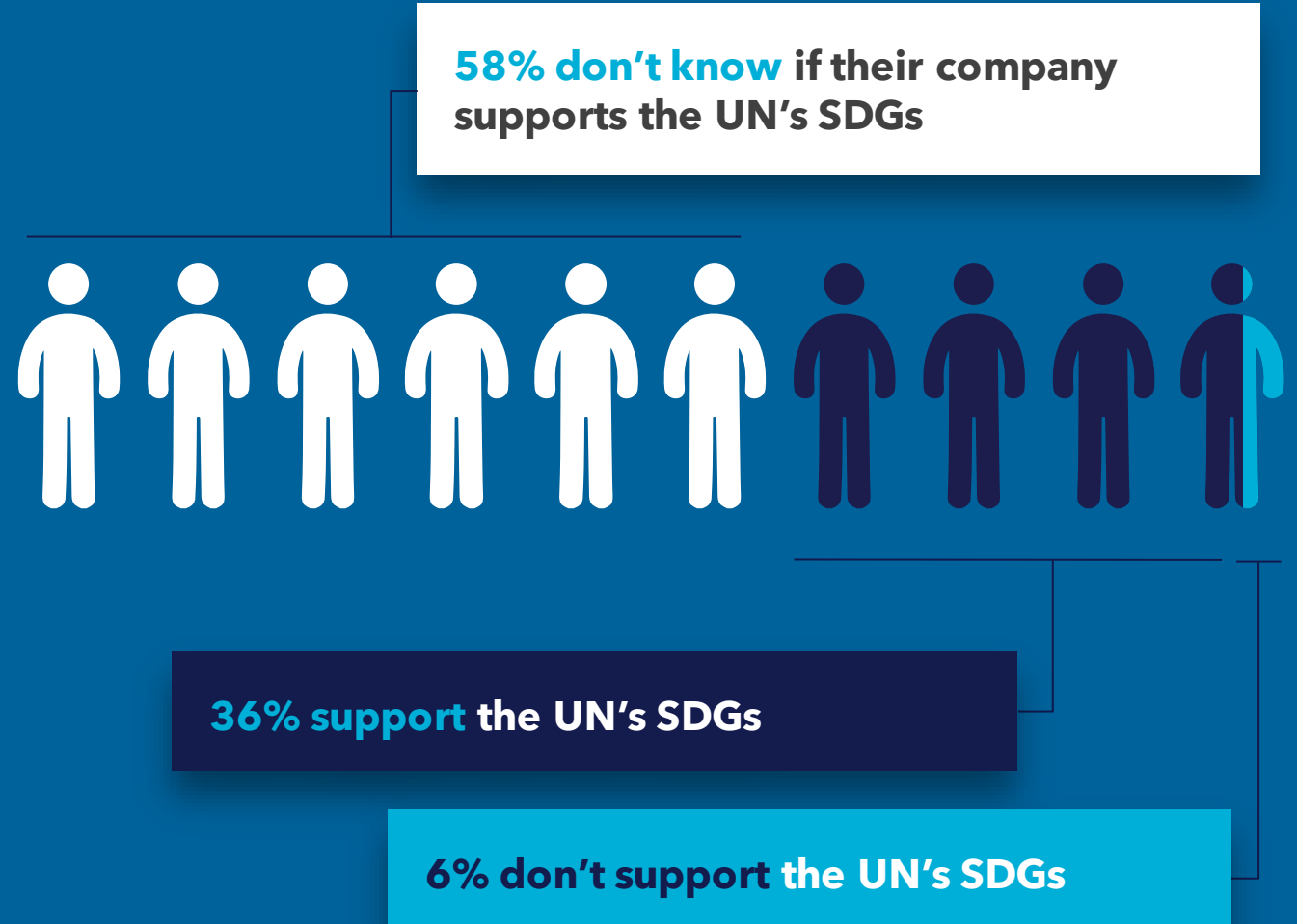
Annual Sustainability Report

While two thirds of travel buyers report their company is publishing an annual sustainability report, more than a quarter do not have this information.



Sustainable Development Goals

6 in 10 travel buyers do not know if their company supports the [United Nations' Sustainable Development Goals](#) (SDGs) that address the world's current sustainability challenges.





Sustainable **travel** program

[Does your travel program encourage sustainable travel?](#)

[Sustainable travel options](#)

[Promotion of sustainable travel](#)

[Sustainable aviation fuel](#)

[Traveler education on human trafficking](#)

[Sustainability metrics](#)

[Carbon emissions targets](#)

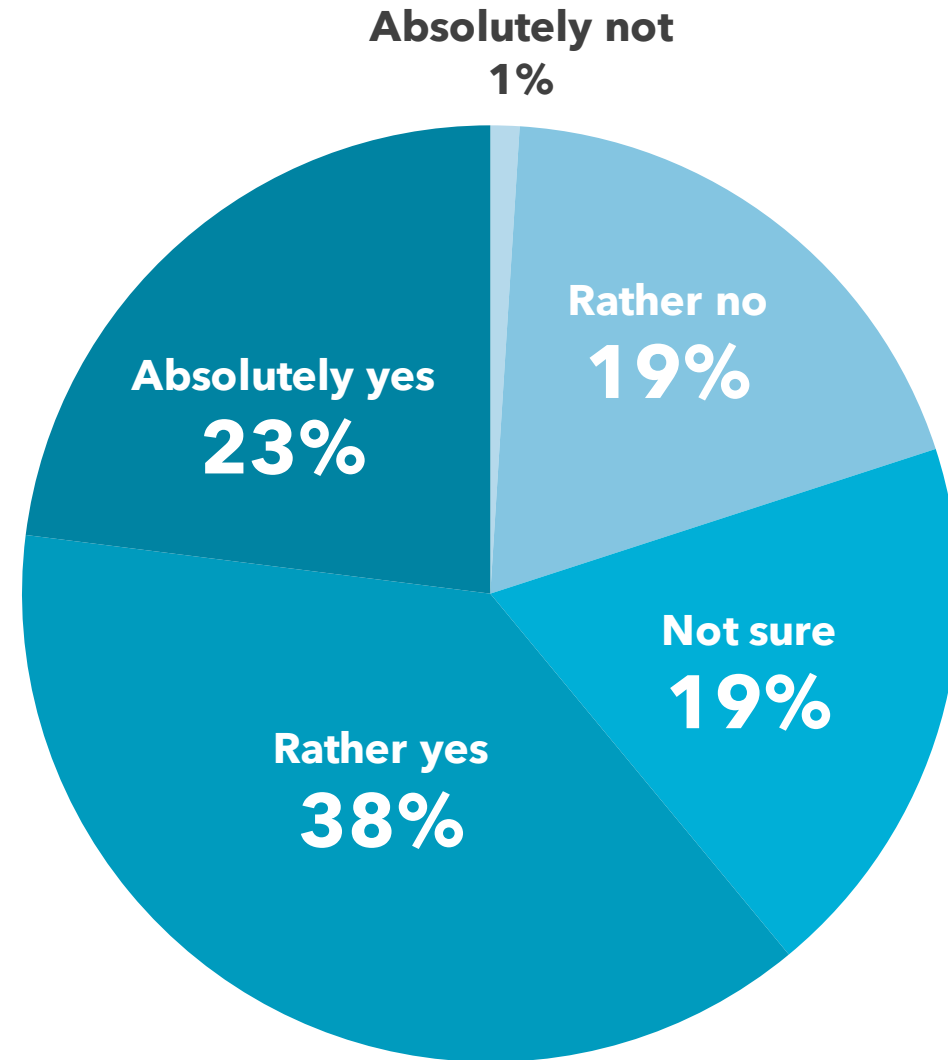
[Knowledge on sustainability](#)

[Benefits of sustainable travel program](#)

[Challenges of sustainable travel program development](#)

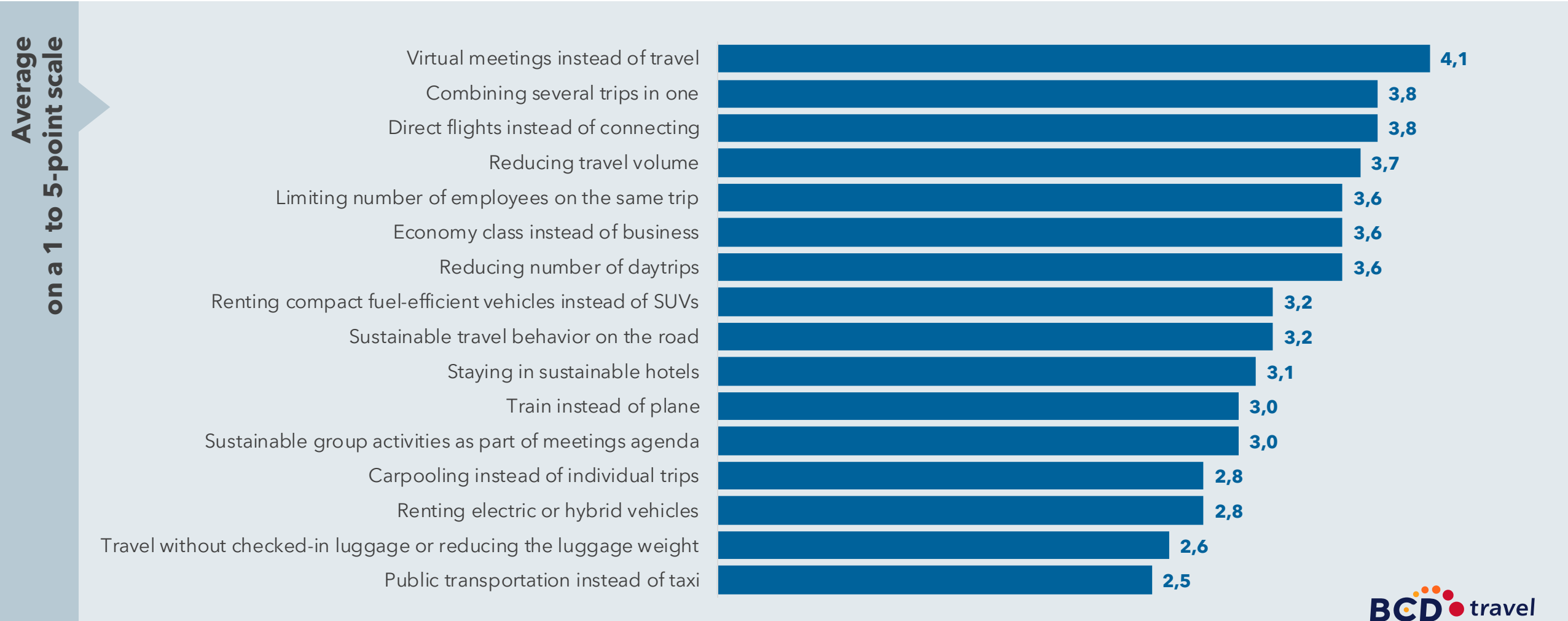
Does your travel program **encourage** sustainable travel?

6 in 10 travel buyers report their travel program encourages sustainable travel. The remaining 40% are equally divided between those providing a negative answer and those who are not sure.



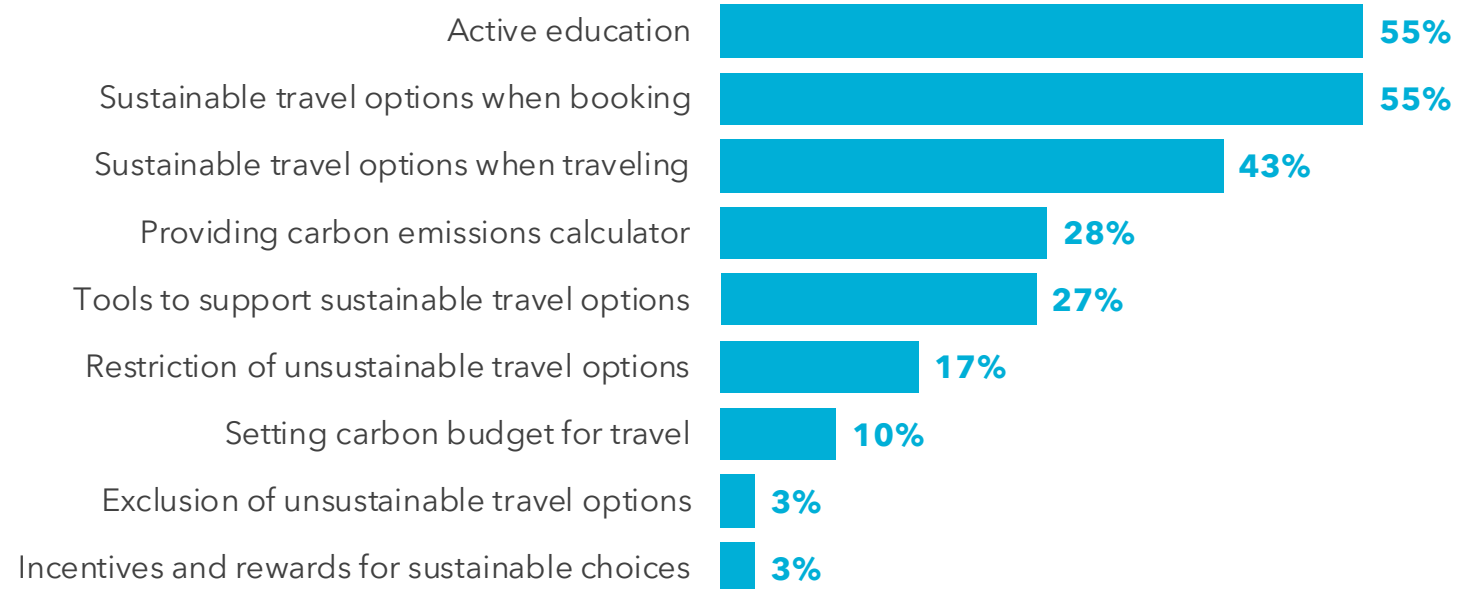
Sustainable travel options

The list of sustainable travel options promoted by the companies is led by virtual meetings, followed by combining trips and flying direct. The least popular options are related to the use of public transport and reducing luggage weight.



Promotion of sustainable travel

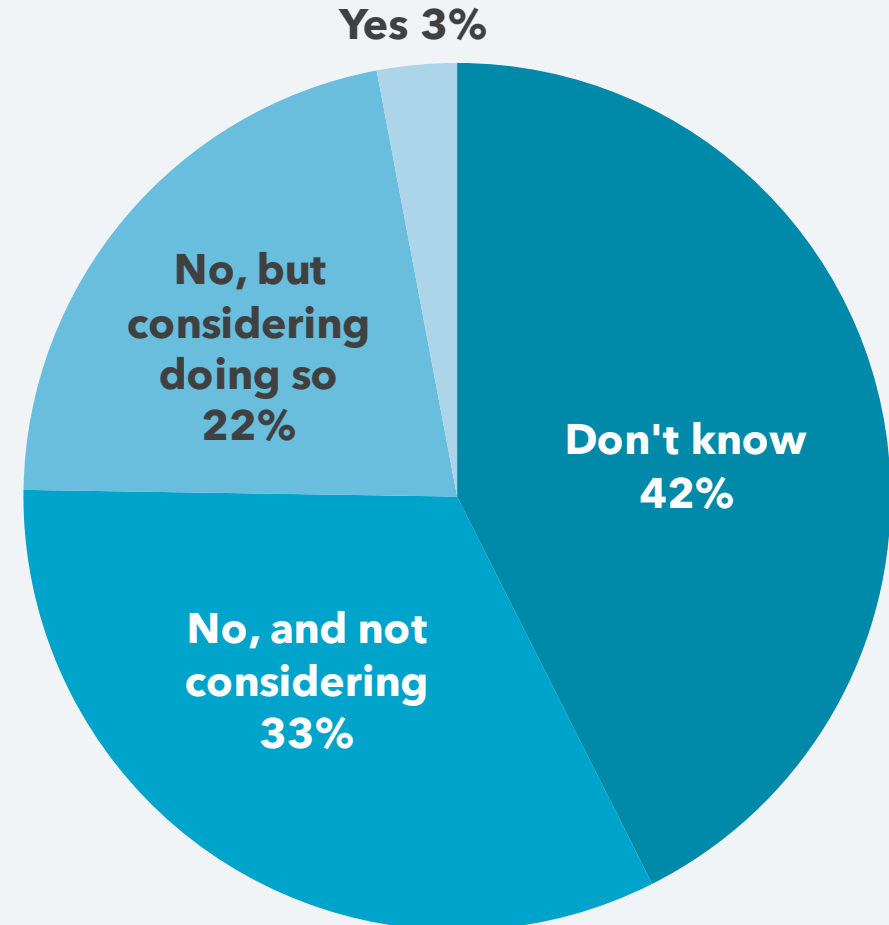
When it comes to promoting sustainable travel, active education and recommendations of sustainable options at the time of booking are most popular.



Sustainable aviation fuel

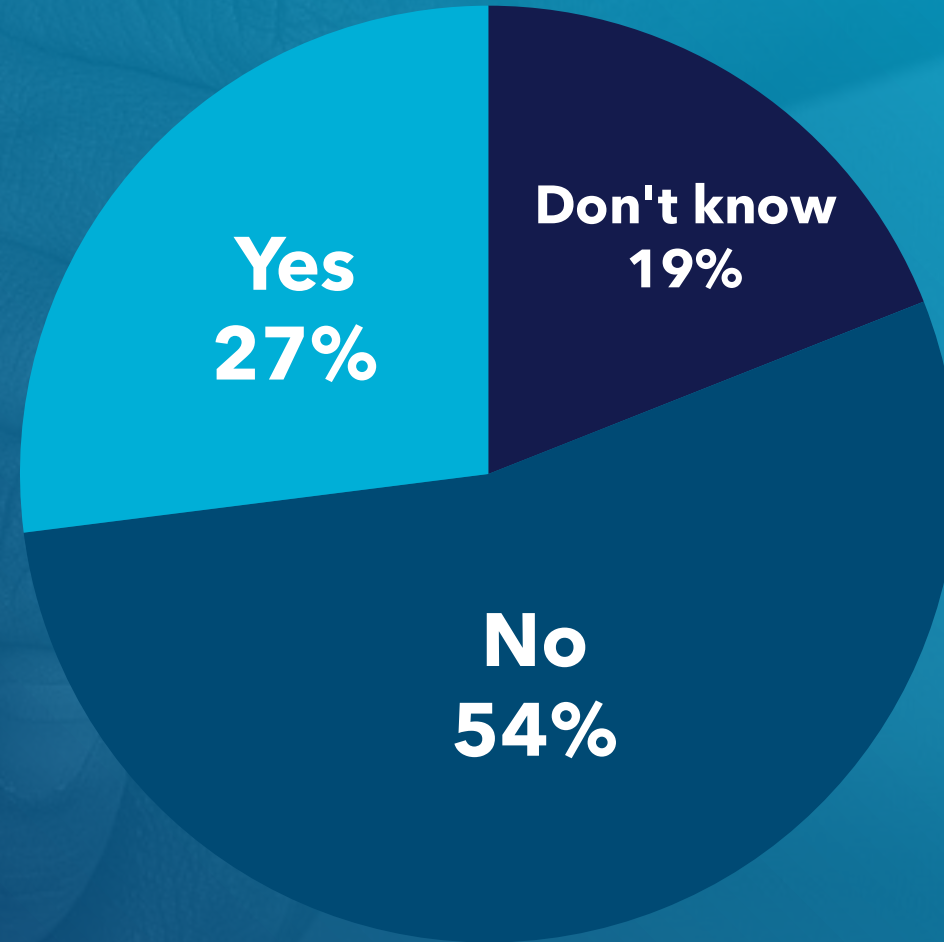
6 in 10 travel buyers are familiar with sustainable aviation fuel (SAF), but only 3% are currently using it. The number is expected to increase, with 22% considering the purchase of SAF in the future.

Do you purchase sustainable aviation fuel?



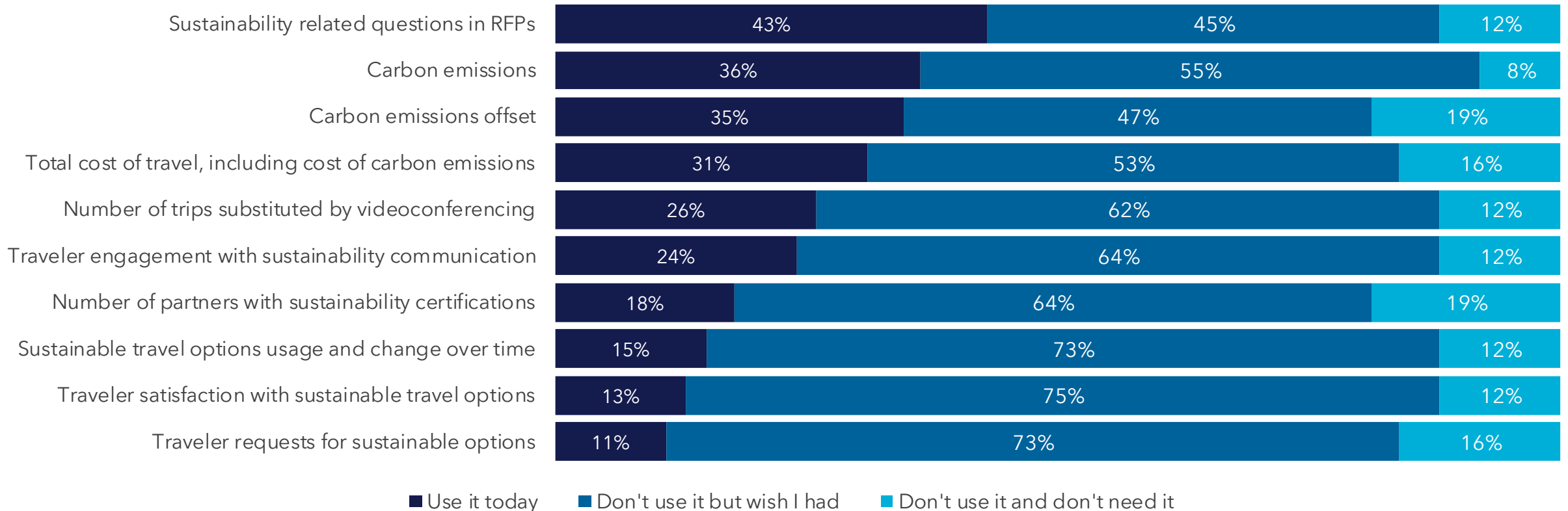
Traveler education on human trafficking

Only a quarter of respondents educate business travelers on human trafficking and women and children exploitation.



Sustainability metrics

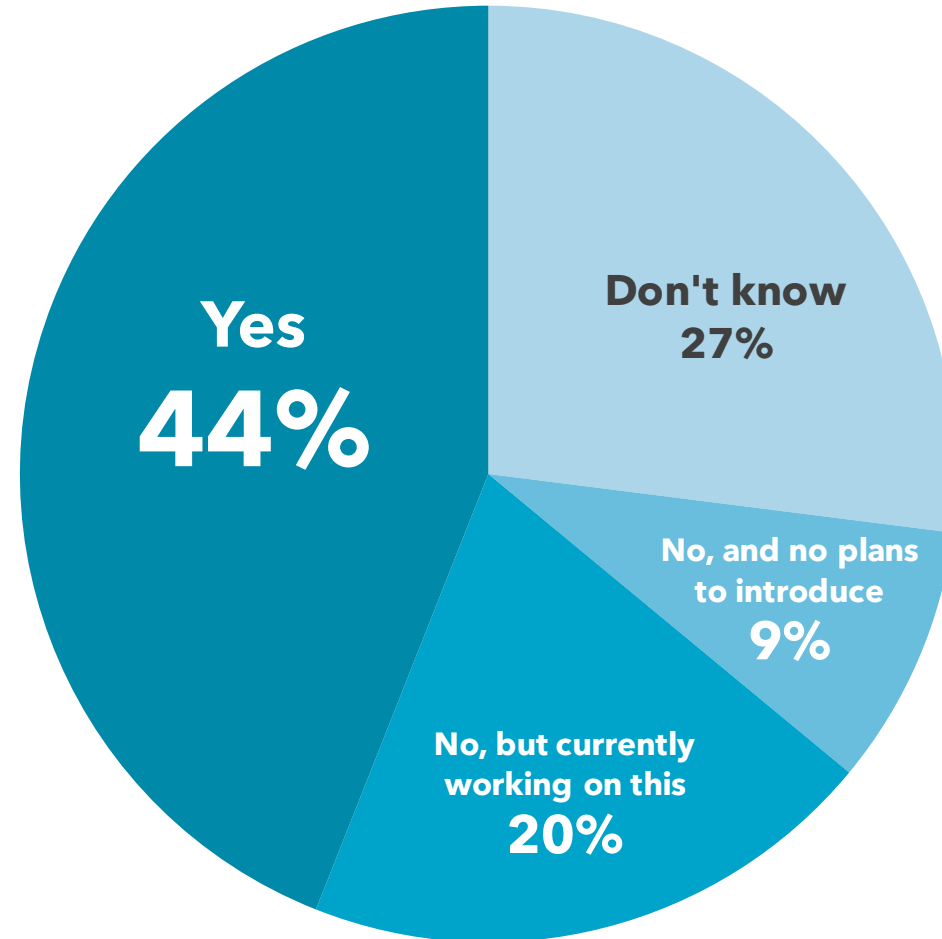
There's a lot to be done to measure travel sustainability. Travel buyers see a particularly large gap when it comes to understanding traveler interest in sustainability. Three quarters would like to have data on traveler requests for green options, actual use of these options and traveler satisfaction.



Carbon emissions targets

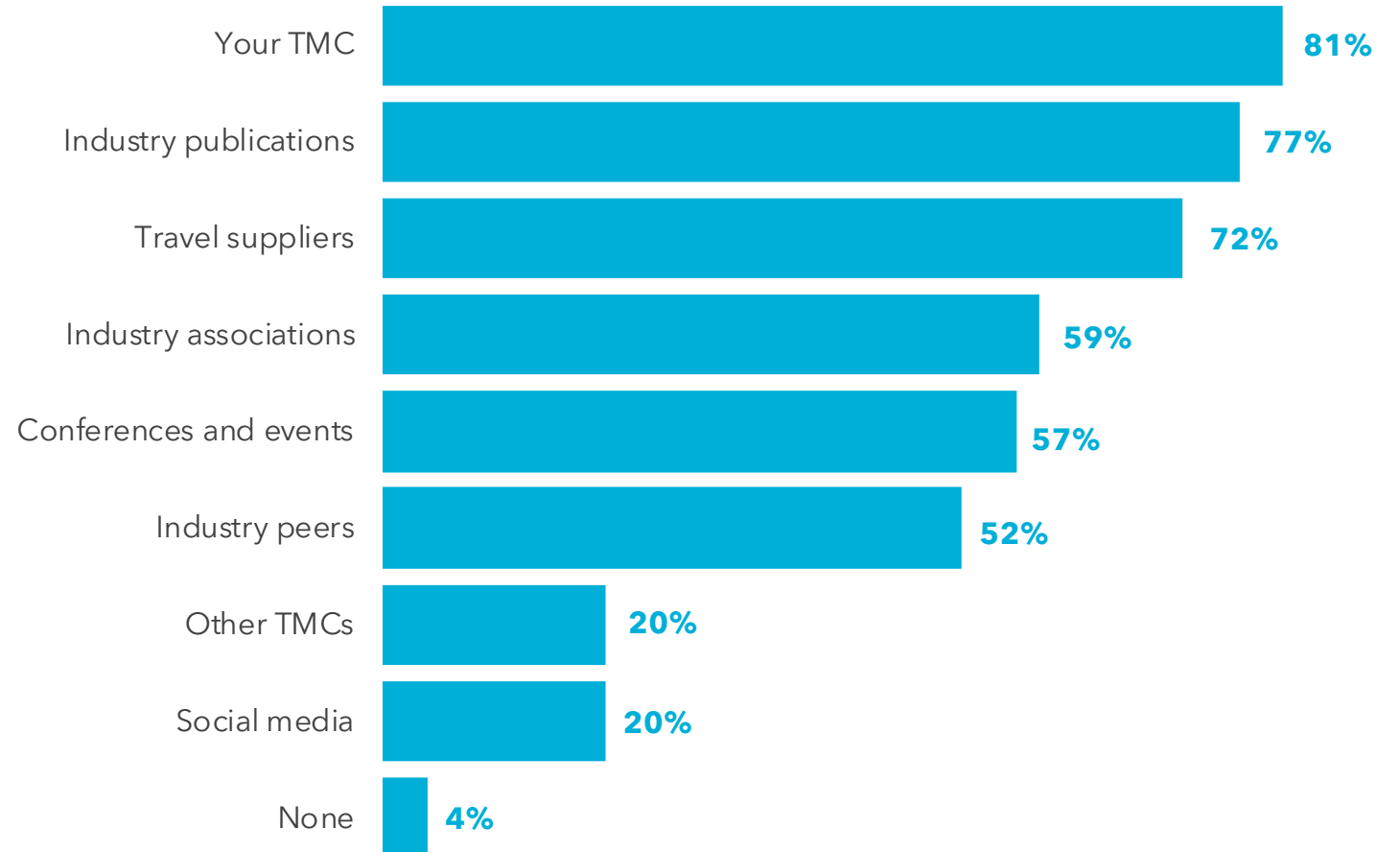
44% of travel buyers report their companies having science-based targets to reduce carbon emissions; 20% plan to introduce them shortly.

The approaches range from small short-term reduction plans to major cuts in carbon emissions in the next 20 to 30 years.



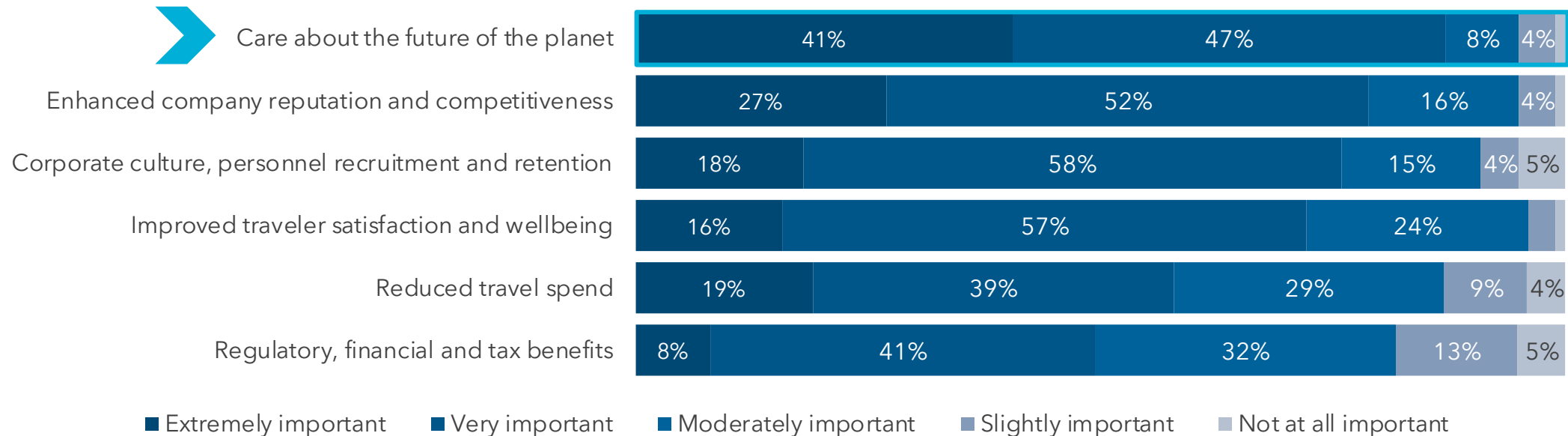
Knowledge on sustainability

Their TMC is the primary source of knowledge on travel sustainability for 8 in 10 travel buyers, followed by travel industry publications and travel suppliers.



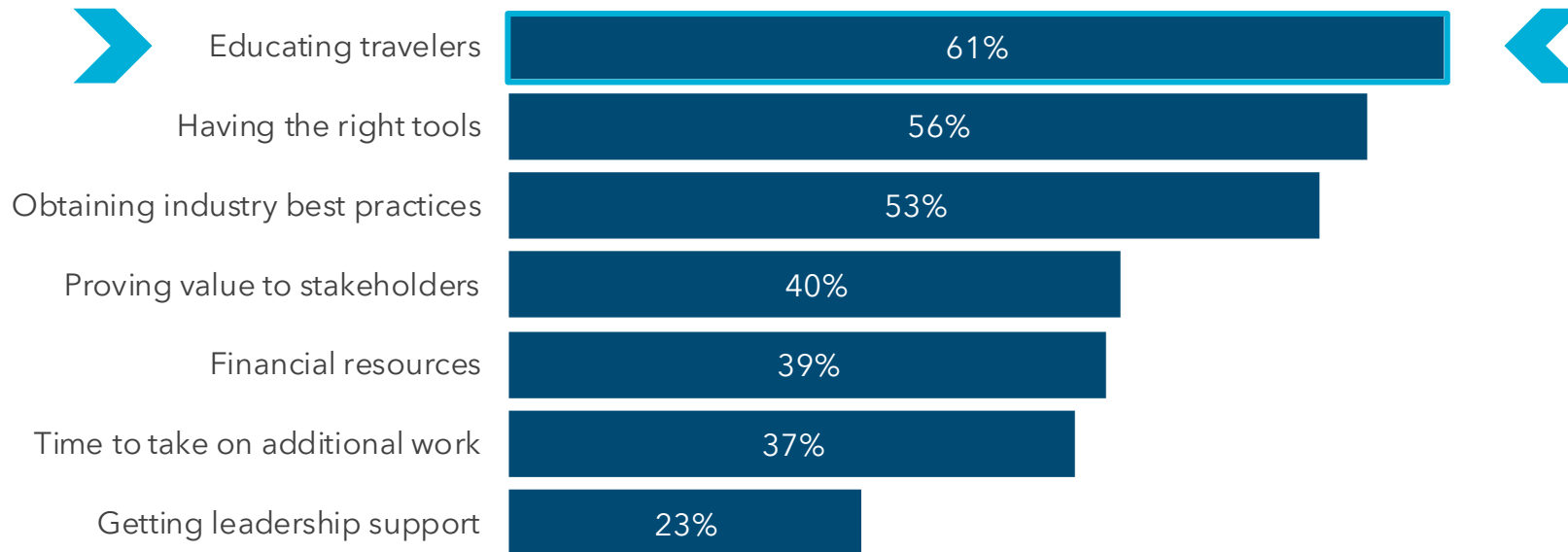
Benefits of sustainable travel program

A sustainable travel program brings plenty of benefits, care about the future of the planet being just one of them. It enhances a company's image, plays a role in personnel recruitment and boosts traveler satisfaction.



Challenges of sustainable travel program development

The biggest challenge to developing a sustainable travel program is traveler education.
Lack of access to the right tools and best practices doesn't help either.





Natalia Tretyakevich

Sr. Manager, Research and Intelligence
Mallorca, ES

natalia.tretyakevich@bcdtravel.eu



Miriam Moscovici

Sr. Director, Research and Innovation
Colorado, USA

miriam.moscovici@bcdtravel.com

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