

SUSTAINABILITY AND THE BUSINESS TRAVELLER

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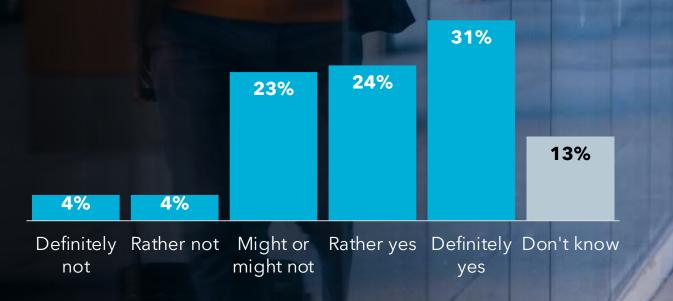
April 2024

BCD

Employer's attitude to sustainable travel

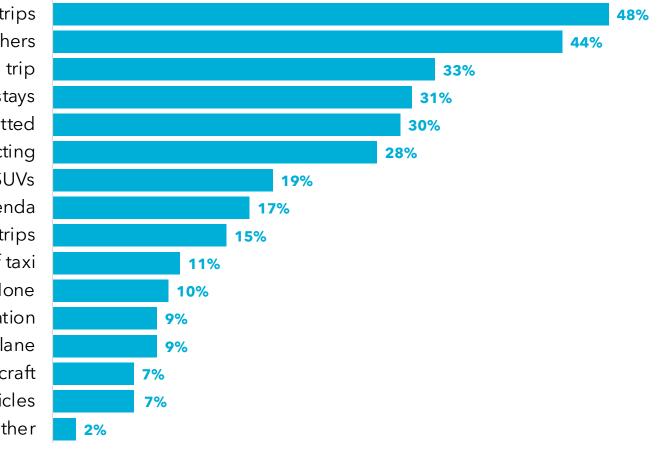
Over half of travelers agree that their employer encourages sustainable travel.

Does your employer encourage sustainable travel?



Sustainable travel options

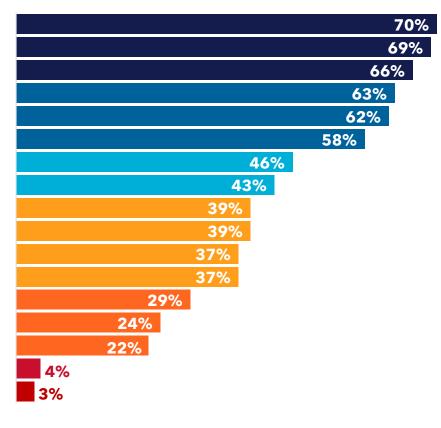
Taking fewer trips and sharing ground transportation when on a trip are the most common sustainable travel choices encouraged by employers: Almost half of travelers agree.



Reducing number of trips Sharing ground transportation with others Limiting number of employees on the same trip Combining several trips in one/longer stays Economy class instead of business, when business is permitted Direct flights instead of connecting Renting compact fuel-efficient vehicles instead of SUVs Sustainable activities as part of meetings agenda Reducing number of daytrips Public transportation instead of taxi None Staying in eco-friendly accommodation Train instead of plane Flying in fuel efficient aircraft Renting electric or hybrid vehicles Other

Sustainable traveler behavior

The most popular sustainable practices embraced on the road are related to hotel stays, where 7 in 10 report avoiding frequent towel change and 6 in 10 refrain from using daily housekeeping. Recycling and going paperless with travel documents are similarly as popular.



Avoid frequent towel change at hotels Go paperless with travel documents Recycle Support local restaurants and vendors Do not use daily housekeeping at hotels Walk where possible Travel with a hand luggage Bring your own water bottle Follow cultural norms of local communities Avoid single-use plastic Minimize weight of your suitcase Minimize weight of your suitcase Minimize use of energy, e.g. air-conditioning or light Apply fuel-efficient driving techniques Minimize use of water None Use bicycles at travel destination



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Sustainable traveler behavior

While over half of travelers are willing to take fewer, but longer business trips, or try new, more sustainable ways of traveling, only 30% are prepared to pay more for sustainable travel options.

| 1 | 10% 12% 24% | | | 37% | | | | 18% | | |
|---|-------------|--|-----|-----|-----|--|-----|-----|------------|--|
| • | 12% 14% | | 20% | | 37% | | | | 18% | |
| 1 | 11% 13% | | 27% | | 31% | | | 19% | | |
| | 21% | | 20% | 2 | 20% | | 22% | | 17% | |
| | 23% | | 21% | 20% | | | 26% | | 10% | |
| | 21% | | 20% | | 30% | | 21% | | 9 % | |

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'd 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



Motivations for sustainable travel

In addition to caring for the environment, 4 in 10 travelers consider company sustainability goals, financial savings and support for communities as major motives for their sustainable travel choices. Personal reputation and incentives are less important.

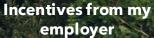


Care about the environment

Company sustainability Financial savings for my goals company

Support for local communities

Personal reputation





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Impact of sustainability: business vs. leisure travel

Sustainability considerations influence leisure travel planning to a greater extent than business trips arrangements. The same is valid for behavior during travel: Travelers pay slightly less attention to sustainability when traveling for work.

| Business travel planning | 20% | 25 | 5% | 23% | : | 20% 11% |
|----------------------------|-------------------|-----------------|-----|------------------|---------------|----------------------|
| Leisure travel planning | 18% | 23% | | 23% | 23% | 14% |
| | Definitely not | Probably not | | ght or ht not | Probab yes | ly Definitely yes |
| Behavior on business trips | 15% | 19% | 22% | 6 | 28% | 16% |
| Behavior on leisure trips | 14% | 18% | 20% | | 29% | 19% |



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