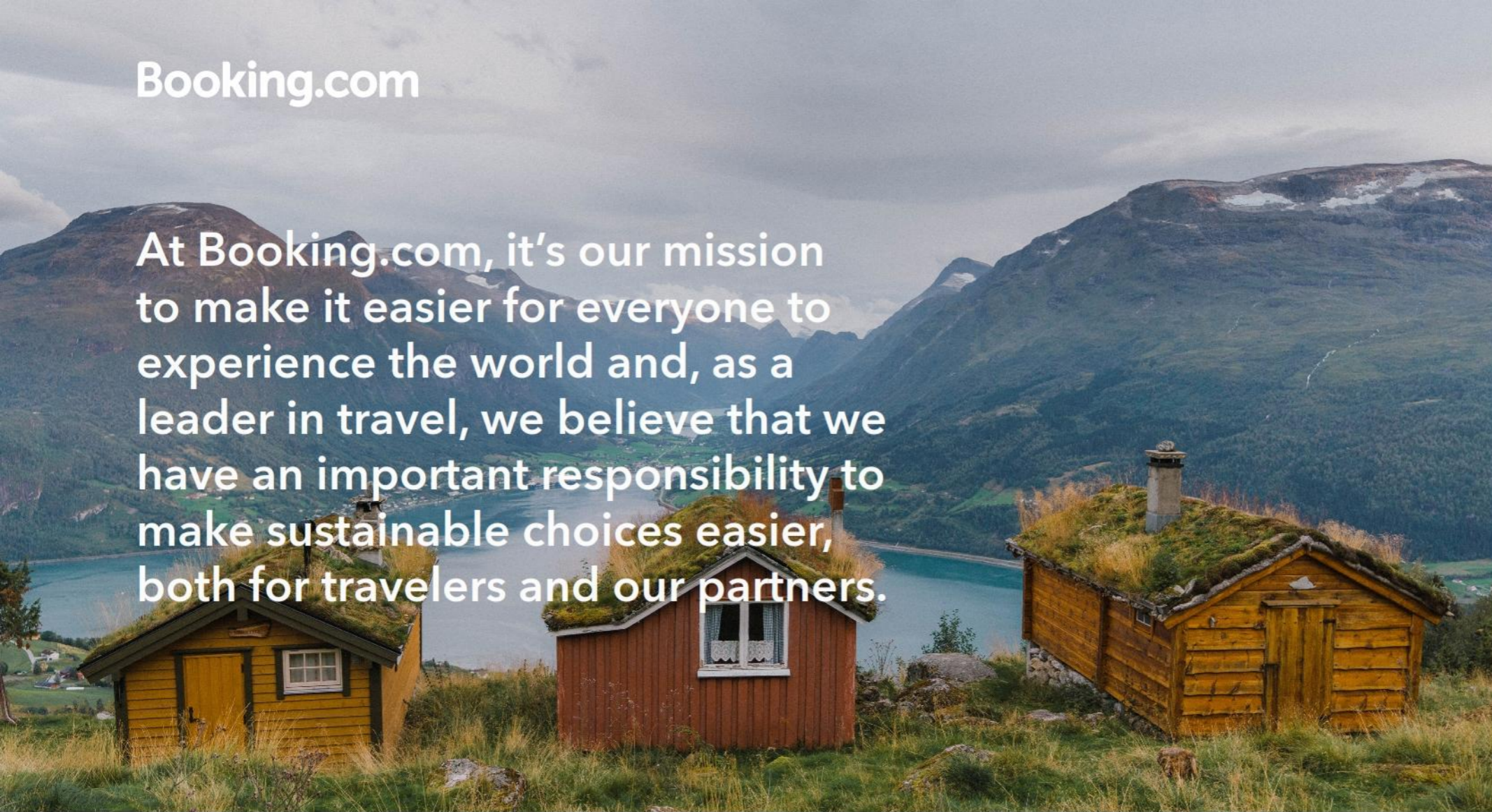


Booking.com

Sustainable Travel Report 2021



At Booking.com, it's our mission to make it easier for everyone to experience the world and, as a leader in travel, we believe that we have an important responsibility to make sustainable choices easier, both for travelers and our partners.



We are at a pivotal moment in travel. Awareness of the impact of our trips is at an all-time high. As we slowly start to return to exploring the world again, we have a unique opportunity to transform our growing sustainable intentions into impactful actions. If done with respect for the world's local communities, environments and biodiversity, travel can broaden horizons, reduce barriers and bring people closer together.

Now in its sixth year, Booking.com's annual Sustainable Travel Report, which gathers insights from over 29,000 travelers across 30 countries, indicates that the events of 2020 could be a crucial tipping point for travelers to truly commit to their own sustainable journey, both at home and during their trips. The findings of this year's research also expose the barriers and gaps that still remain, despite the actions many travelers are already taking to help protect the planet for future generations and contribute to the long-term socio-economic health and happiness of local communities.

Finally, the report explores how the industry is continuing to evolve and some of the challenges that remain. While the availability of more sustainable options continues to grow, with more and more travel providers implementing impactful practices into their operations, more needs to be done. There is work to do to inspire and encourage more players in the industry to do the same, as well as to surface this information in a transparent and meaningful way for consumers, so that more sustainable travel becomes an easier choice for everyone.

Making Sustainable Choices Easier



Marianne Gybels

Director of Sustainability at Booking.com

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The findings from Booking.com’s annual sustainable travel report are even more poignant this year, as the travel industry looks to rebuild after the Coronavirus pandemic. Our research uncovers how the travel hiatus has opened travelers’ eyes to the impact, both positive and negative, that their trips can have on local ecosystems and communities around the world.

At Booking.com we believe travel is a force for good, but it has to be done in the right way to ensure we are protecting the planet for future generations.

Sustainability is a guiding principle for everything we do at Booking.com, from how we think about the environmental and socio-economic impact of the travel we facilitate via our platform, to how we engage with local communities through our employee volunteering programs and other corporate initiatives, as well as the impact of our own business operations.

The more sustainable practices we can help our partners to identify and implement, the more we can experiment with how best to highlight this information to customers and ultimately make sustainability a transparent and easily identifiable part of their travel decision-making process. Small

changes such as eliminating single-use plastics or switching to energy-efficient LED light bulbs might seem insignificant in isolation, but multiplied by millions of travelers and properties around the world, these small steps all start to add up to a much bigger potential positive impact.

To that end, we are helping to support our partners in their efforts to become more sustainable, providing education and inspiration to take the next important steps on their journey. This starts by encouraging them to identify and share the sustainability practices they already have in place with us, so that we can make this information transparent and easy for travelers to discover when they are searching for a property on our platform. In addition, we have also started to display over 30 certifications officially approved by the Global Sustainable Tourism Council (GSTC), Green Tourism and the EU Ecolabel, as well as multiple hotel chain sustainability programs on Booking.com.

While there is much, much more to be done, we are optimistic about the passion and commitment we are seeing from all sides. No matter where travelers or our accommodation partners might be on their individual sustainability journey, we want to encourage them to take the next step, so that together we can create a truly regenerative and responsible future for all travel.



The Pandemic Effect

While most of us can't wait to get back to exploring the world again, there are clear indications that the Coronavirus pandemic may have influenced our collective commitment to do so in a more mindful way. Based on this year's research, we expect to see a rise in travelers actively searching for more sustainable options that are compatible with their growing intentions to be more thoughtful with each trip that they take.

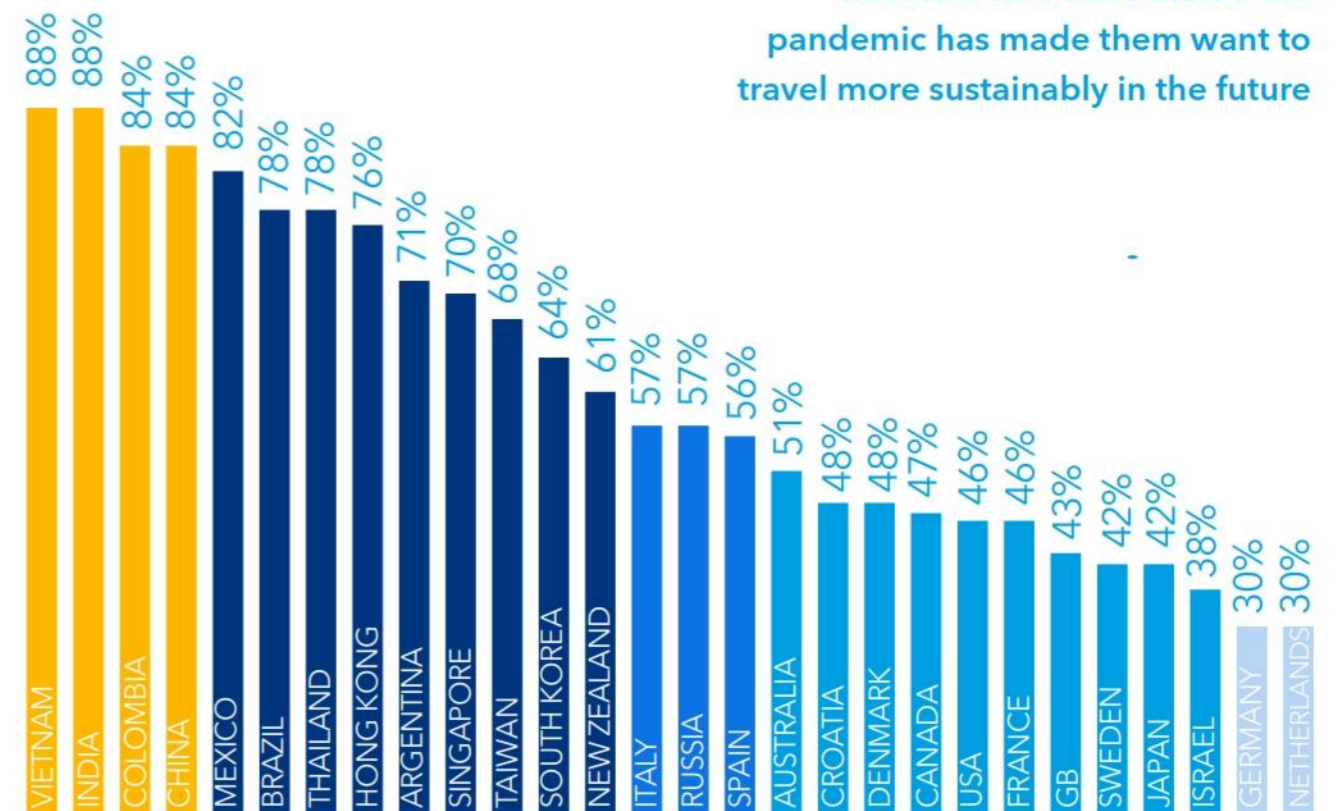
61%

of travelers state that the pandemic has made them want to travel more sustainably in the future.



49%

of travelers admit that the pandemic has shifted their attitude to make positive changes in their everyday lives.



The top priorities in travelers' everyday lives include:



49%

Recycling



42%

Reducing food waste



34%

Walking or cycling short distances to avoid public transport or cars



33%

Avoiding single-use plastic

The momentum to be more mindful in how we live and travel has been steadily increasing in recent years. However, a year of limited mobility for virtually everyone has accelerated our attention and focus on the challenges and associated opportunities to do so more responsibly, with 72% of travelers believing we have to act now to save the planet for future generations.



Sustainability awareness among consumers isn't limited to environmental impact alone, but also encompasses important socio-economic considerations with respect to local communities where travel takes place:

The biggest impact concerns for travelers include:



46%

Excess waste (e.g. single use plastics)



38%

Threats to local wildlife and natural habitats



30%

Overcrowding popular sights or destinations



29%

CO₂ emissions



84% believe increasing cultural understanding and preservation of cultural heritage is crucial.



76% want to ensure the economic impact of the industry is spread equally in all levels of society.

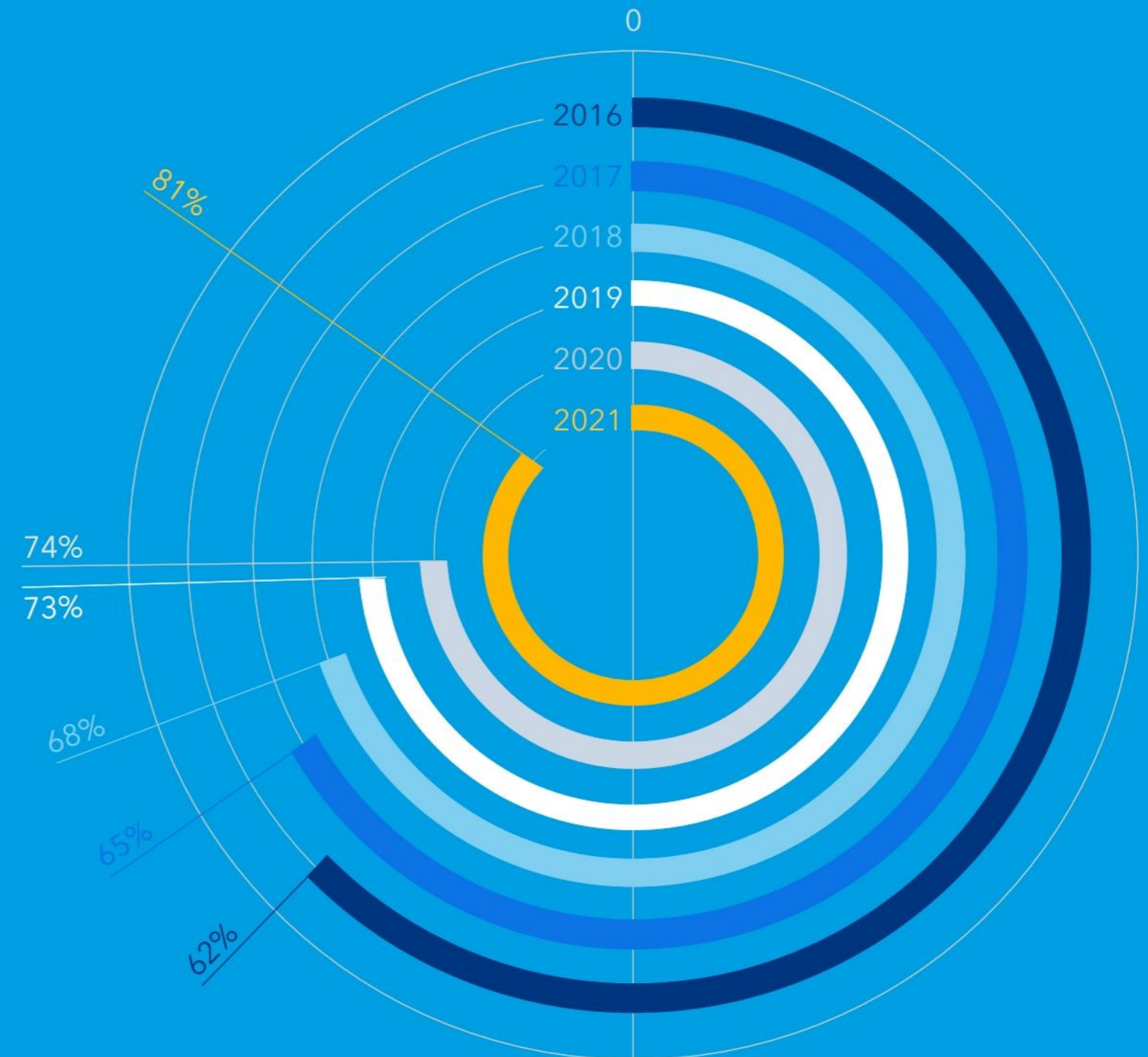


73% want to have authentic experiences that are representative of the local culture when they travel.

Barriers to Make Good on Sustainable Intentions Remain

Since Booking.com's annual sustainable travel report was first released in 2016, travelers' intent to stay in a sustainable accommodation has notably increased, accelerating in 2021 while travel was largely on hold in most parts of the world.

Global travelers intend to stay in a sustainable accommodation, at least once in the upcoming year:



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However, despite 76% of travelers pledging to seek out accommodation that has reputable third-party sustainability accreditation, barriers still remain with 49% of travelers believing there simply still aren't enough sustainable travel options available in 2021.



73%

would be more likely to choose an accommodation if it has implemented sustainability practices.



40%

of travelers believe it would be helpful if travel booking sites used a **clear label so they could easily identify when an accommodation is more sustainable.**



37%

would like to see online travel booking sites offering a sustainable filter option.



35%

would like to see travel companies offering tips on how to adopt better practices while traveling.



72%

think travel companies should offer more sustainable choices.

48%

say they find it harder to make sustainable choices while on vacation than in their everyday life.

41%

of travelers indicate that they don't know how to find sustainable travel options.

33%

view vacations as a special time where they want to escape and relax, without thinking about sustainability.

32%

report that they don't know how to make their travel more sustainable.

Taking Personal Responsibility to Travel More Sustainably

According to the research, intentions to make future trips more sustainable reveal consumers' apparent readiness to take matters into their own hands and take personal responsibility for their own travel behavior. This suggests that travelers are starting to think more holistically about their impact and the different tweaks and shifts they deem necessary. This further illuminates that **making more sustainable accommodation choices is just the beginning.**



83% want to reduce their energy consumption (e.g. by turning off air conditioning and lights in their room when they are not in it, for example).



79% want to use more environmentally friendly modes of transport (i.e. walking, cycling or public transport over taxis or rental cars).



76% are keen to reduce water usage (e.g. by reusing towels or opting out of daily room cleaning).



69% are committed to reducing the carbon footprint of their trip or pay to offset this whenever possible.

On a quest to cut down waste and single-use items during their vacations, travelers are vying to make more considerate choices.

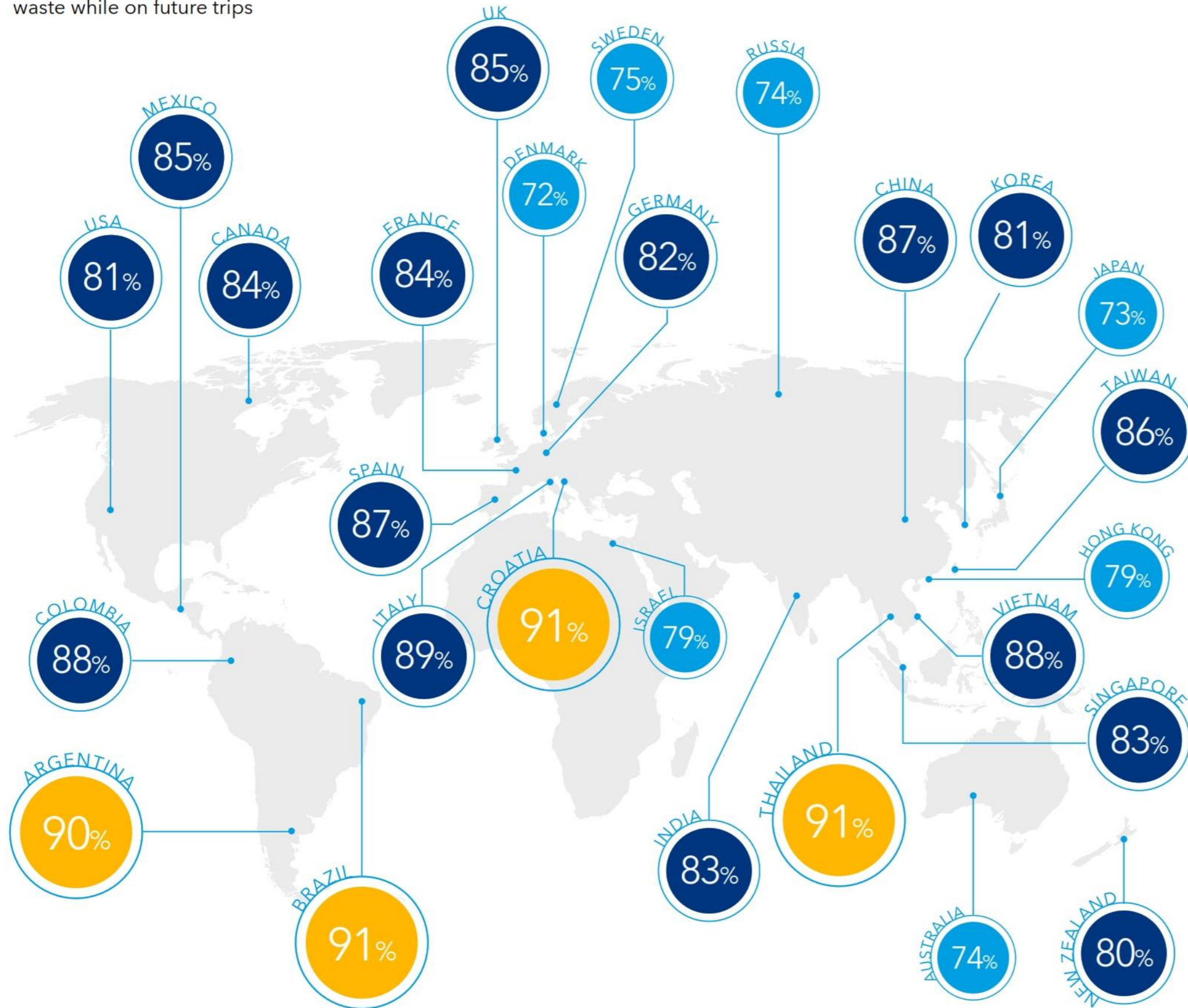


84% want to reduce general waste on future trips.



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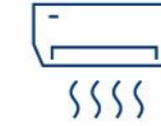
People who want to reduce general waste while on future trips



Sustainable Travel Intentions vs Impactful Actions

The latest insights also reveal that it's not just good intentions for future trips that are top of mind for travelers - many report already actively taking important steps to have a more positive impact during their recent travel.

When thinking about their trips over the last 12 months:



45%

made a conscious decision to turn off their air conditioning/heater in their accommodation when they weren't there.



43%

took their own reusable water bottle, rather than buying bottled water while on vacation.



40%

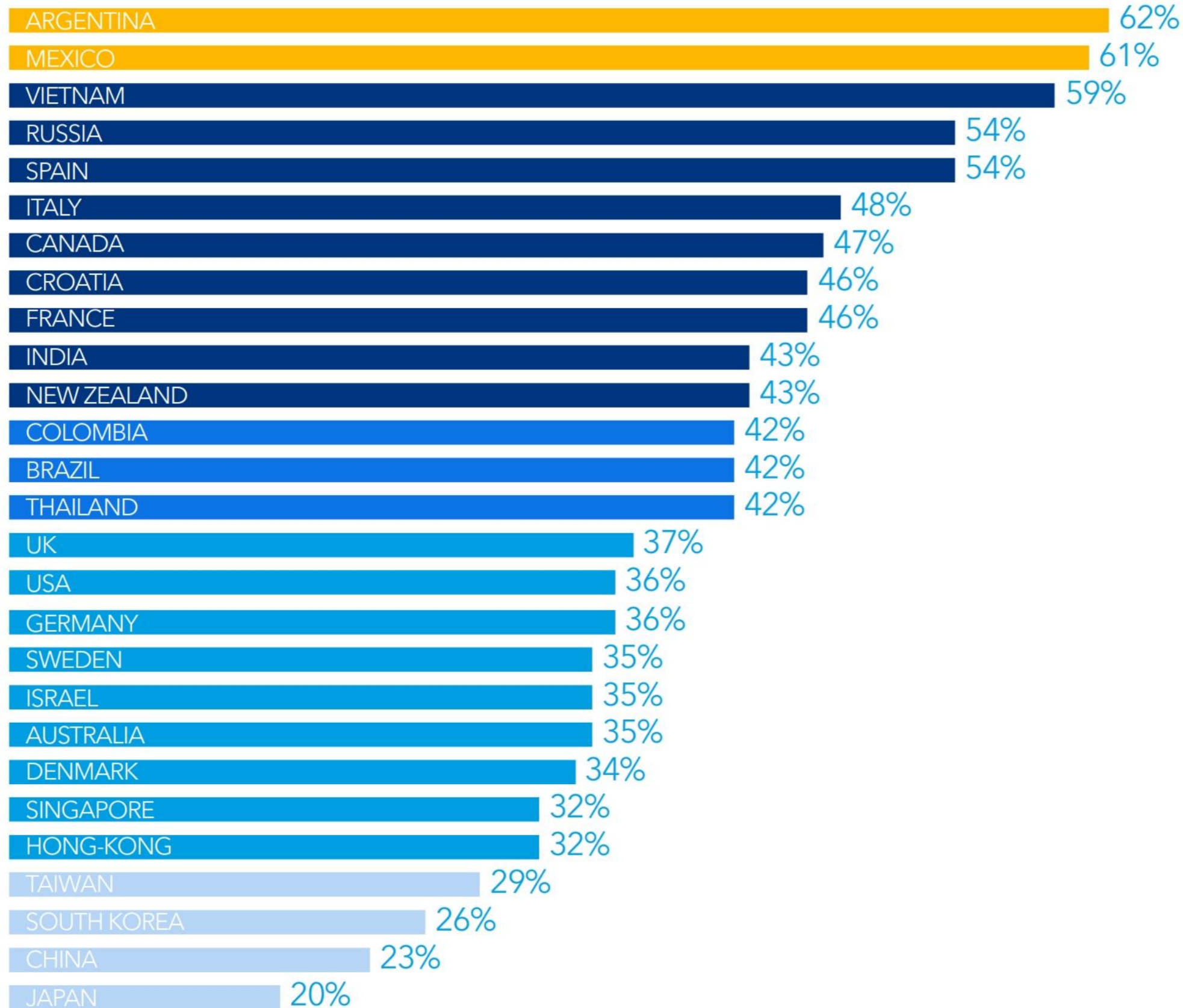
reused the same towel to reduce water usage.

42%

shopped at small, independent stores to support the local economy during their travels.



People who shopped at small, independent stores during their trips over the past 12 months to support the local economy



This year's report also shows a marked increase since last year of global travelers becoming more in tune with the actions they believe accommodation providers should be taking to help protect the world and local communities:



35%



believe that having electricity controlled by keycards and/or sensors to reduce energy use for air conditioning or heating should be provided.

Compared with 30% in 2020

32%



consider offering guests information about local ecosystems, heritage, culture, as well as visitor etiquette as a step in the right direction.

Compared with 28% in 2020

27%



believe that accommodations should offer guests the option to opt out of daily room cleaning to reduce water usage.

Compared with 22% in 2020

27%



of travelers would prefer only being offered reusable plates and cutlery for all meals, including room service.

Compared with 23% in 2020



In Search of More Sustainable Stays

In addition to the behaviors that travelers say they are willing to change or have already changed themselves, they believe that there is much that the places they stay can also do to make being more sustainable easier for them. In fact, 53% get annoyed if somewhere they are staying stops them from being sustainable, by for example, not offering recycling facilities or relying on single-use plastics.

Additional research from Booking.com uncovers that accommodation partners and travelers do appear to be largely on the same page in seeing sustainability as a priority, as 82%* of Booking.com's accommodation partners view sustainability in the hospitality industry as important, mirroring the 83% of travelers who believe sustainable travel is a vital issue.

However, although 3 out of 4* accommodation partners say that they have implemented some kind of sustainable practices at their property, under a third (31%*) actively communicate about their efforts proactively to potential guests, with this mostly happening at the time of check-in (59%*).



The top reasons accommodation partners are not communicating their sustainability efforts to guests is because:



don't believe they do enough that is worth communicating to guests.



don't think their guests are interested.



are concerned that their guests may find the communication patronizing.

These reservations from partners highlight that significant challenges remain in the industry to make sustainability information easier to access for consumers at earlier stages of the booking and travel decision-making process, so they can actually put more of their sustainable travel intentions into action.

Closing the Gap, Step by Step

As part of our mission to make it easier for everyone to experience the world and as a leader in travel, at Booking.com we are taking important steps to make sustainable travel choices easier, both for accommodation providers and travelers. That's why we are currently rolling out a program for properties that will support them in taking the next steps to become more sustainable, no matter where they might be on that journey.

As part of this program, we are sharing guidance, insights and best practices with partners via various educational opportunities, including sustainability handbooks and dedicated content on our Partner Hub.

In connection, on Booking.com we are currently displaying over 30 certifications officially approved by the Global Sustainable Tourism Council (GSTC), Green Tourism and the EU Ecolabel, as well as multiple hotel chain sustainability programs. We are sourcing this information directly from the certification bodies and displaying it on the property pages of partners who hold one of these established third-party certifications.

Alongside this, we are also encouraging our accommodation partners to update their sustainability information, which includes 32 impactful practices across five key categories: waste, energy and greenhouse gases, water, supporting local communities and protecting nature. From this global roll-out, hundreds of thousands of properties have now shared their sustainability information with Booking.com, which can be viewed on the 'Sustainability initiatives' banner on each of their property pages. While it's still early days, this is an important first step in providing more sustainability information in a transparent way to consumers, ultimately making it easier for them to start making more sustainable travel choices.





Methodology

Research commissioned by Booking.com and independently conducted among a sample of 29,349 respondents across 30 countries and territories (1,000 from USA, 1,007 from Canada, 1,000 from Mexico, 964 from Colombia, 1,000 from Brazil, 1,000 from Argentina, 999 from Australia, 941 from New Zealand, 1,001 from Spain, 1,000 from Italy, 1,000 from France, 1,000 from UK, 1,000 from Germany, 1,003 from Netherlands, 986 from Denmark, 1,000 from Sweden, 997 from Croatia, 1,005 from Russia, 1,003 from Israel, 1,000 from India, 1,000 from China, 1,005 from Hong Kong, 968 from Thailand, 963 from Singapore, 1,000 from Taiwan, 1,005 from Vietnam, 1,000 from South Korea, 1,000 from Japan, 1,002 from South Africa, 500 from Kenya). In order to participate in this survey, respondents had to be 18 years of age or older, had to have traveled at least once in the past 12 months and must be planning to travel in 2021, and be either the primary decision maker or involved in the decision making of their travel. The survey was taken online and took place in March 2021.

*Research conducted by Booking.com with a representative sample of 3,390 accommodation providers from Australia, Austria, Brazil, China, Croatia, France, Germany, Greece, India, Indonesia, Italy, Japan, Mexico, Poland, Portugal, Russia, Spain, Thailand, the United Kingdom and the United States. The survey was taken online and took place in April 2021.