



RESEARCH REPORT

A more sustainable tourism sector:

Helping accommodation providers
start their sustainability journey

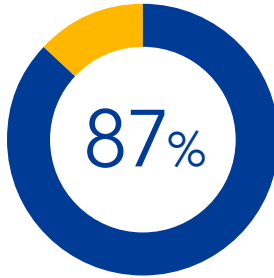
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Accommodation providers think sustainability is important

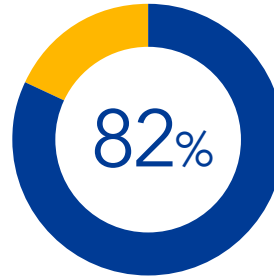
In our 2023 accommodation partner survey, 87% of respondents told us that they consider sustainability to be important.

But while nearly the same number are taking action themselves - with 82% saying they already have some practices in place at their property - far fewer are achieving third-party sustainability certification.

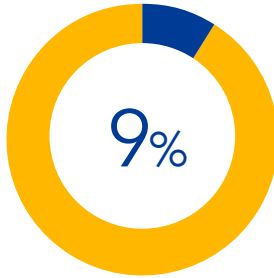
In fact, only 9% of respondents in our research said they have a third-party certification.



Consider sustainability to be important



Already have sustainable practices in place at their property



Have a full sustainability certification



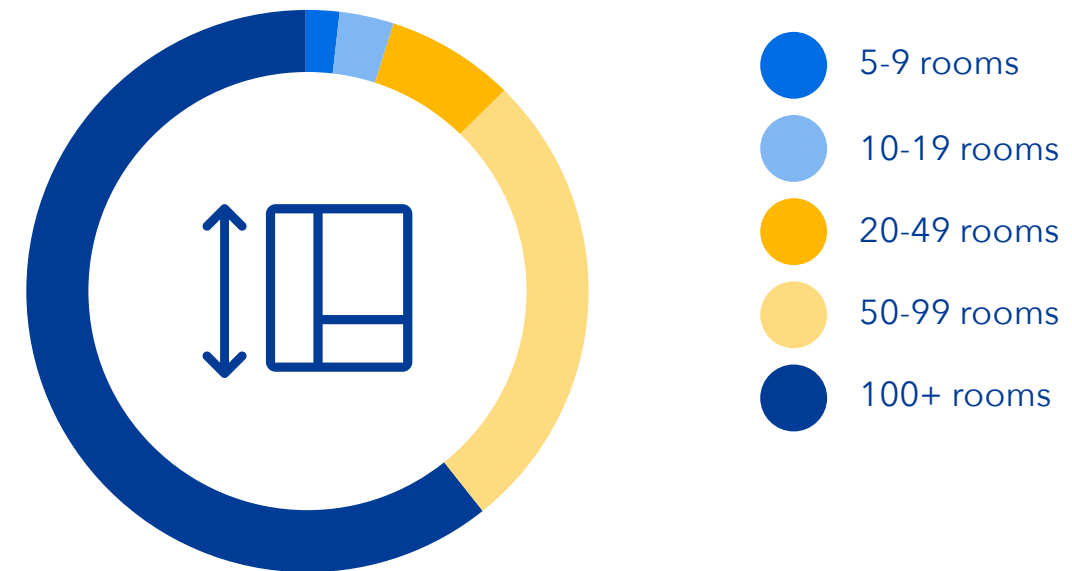
SME accommodation providers risk getting excluded.

Where progress is being made, it's often disjointed, at a slow pace, and tends to disadvantage SME accommodation providers.

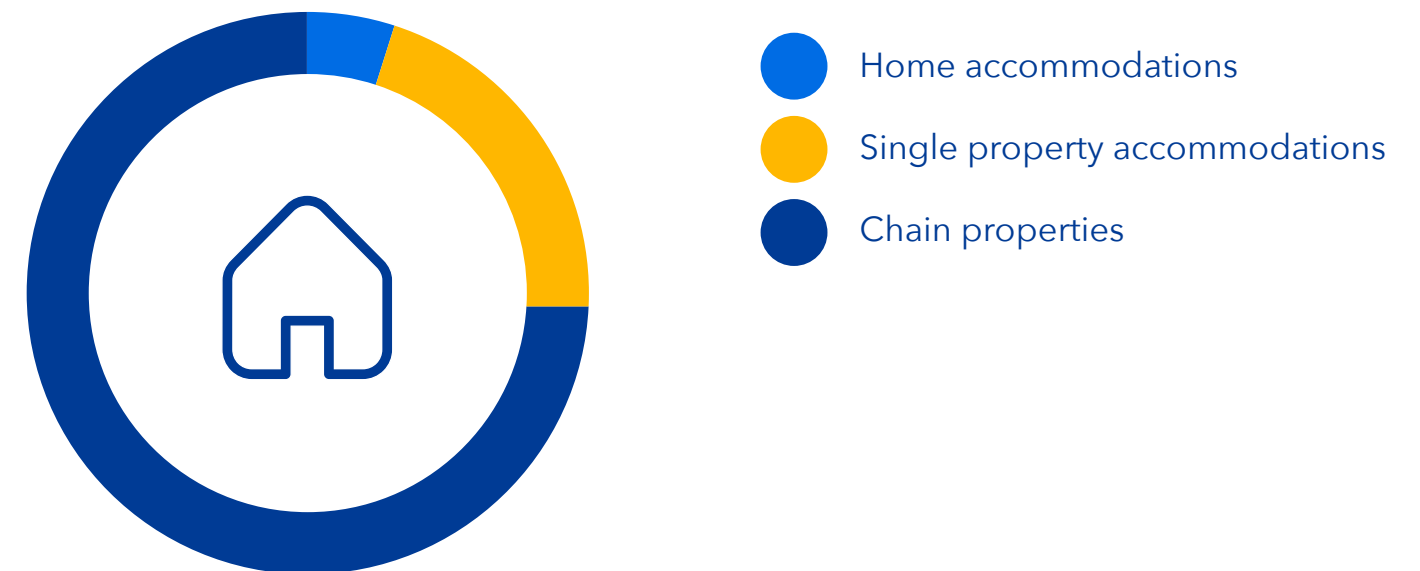
From our data, we see that larger hotels and chain properties are far more likely to have a third-party certification than smaller properties.



Certification share by accommodation size



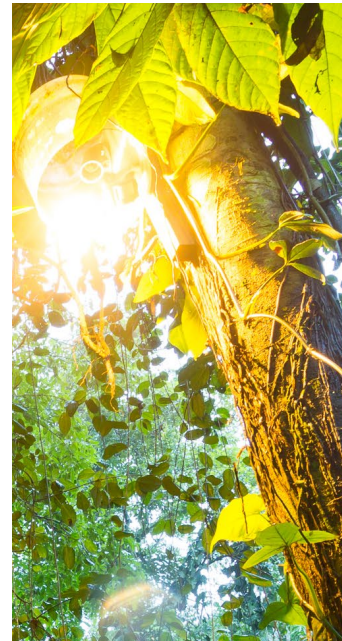
Certification share by accommodation segment



One reason that more accommodation partners don't get certified - including SMEs - may simply be lack of awareness.

When asked, 41% of partners said that they'd never heard about third-party certifications.

Whether from unawareness or deeming certification not to be a priority, trying to make sustainability advances without expert third-party support can result in three potential risks - especially for the SME accommodation providers who make up a large percentage of accommodation supply.



1. They may miss out on savings

Accommodation providers have a lot of competing demands on their limited time and budgets, so are understandably hesitant about taking on additional expenses. Our research showed that 39% of all accommodation providers see the investment cost needed to implement sustainability measures and practices at their properties to be too high.

However, the most-commonly-cited perceived benefit of adopting sustainability practices - with 68% of responses - was cost savings.

This disconnect could mean that SME accommodation providers increasingly miss out on potential cost savings simply because they aren't aware of them.

When surveyed, 53% of all accommodation providers who were aware of certifications listed cost savings (e.g. lower water/electricity costs) as a perceived benefit.



41%

Said they have never heard about certification



39%

See the investment cost to implement sustainability measures and practices to be too high



68%

Cited cost savings as a perceived benefit of adopting sustainability practices



53%

Cited cost savings as a perceived benefit of achieving a sustainability certification



2. They may miss out on potential guests

Our research shows that there is appetite from travellers for more sustainable options too.



Confirm that travelling more sustainably is important to them



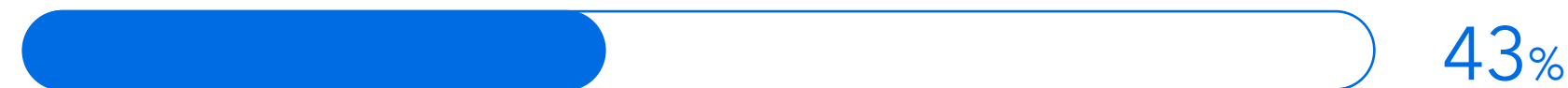
Say they want to travel more sustainably over the coming 12 months



Would feel better about staying in a particular accommodation if they knew it had a sustainability certification or label



Want to filter their options for those with a sustainability certification next time they book



Would be willing to pay extra for more sustainable travel options



This data shows high levels of intent when it comes to traveller decision-making. We are yet to see if this intent turns into quantifiable action, but what it does show is that travellers are increasingly conscious of their impact and this may well influence purchasing decisions in the near future.

When surveyed, 47% of accommodation providers who were aware of certification cited attracting sustainably-minded guests as a perceived benefit.



3. They may risk falling short of ever-evolving compliance rules

To help protect consumers - and to incentivise the adoption of more sustainable practices - some governments are beginning to introduce mandatory compliance rules in many industries. This includes hospitality generally, and in some cases accommodation providers specifically.

Examples include:

- 1 **Türkiye** becoming the first government in the world to develop a mandatory national programme with the Global Sustainable Tourism Council

- 2 **Singapore** mandating that by 2025 it will require 60% of hotel stock to achieve an internationally-recognised hotel sustainability certification



Third-party experts monitor such changes and can help to keep certified accommodation providers informed and compliant, whereas those attempting to rely on in-house processes may find themselves missing key changes that affect them.

Of the accommodation partners who were aware of certification, 41% surveyed listed reassuring guests of the credibility of their sustainability claims as a perceived benefit.





The collective potential of SME accommodation providers

By supporting SME accommodation providers in unlocking these benefits for themselves, the industry may also help to achieve a far wider impact.

After cost, the second most cited reason accommodation providers have for not implementing any sustainability practices is that the owners feel their property is too small to make an impact (38%).

But while each SME accommodation provider might be small, there is huge potential in the impact they could all have collectively.

The main barriers to certification - and what can be done about them

Awareness isn't the only barrier to certification.

Accommodation partners have a number of concerns when it comes to investing in sustainability.

What accommodation partners say...

58% Don't believe it will bring more guests

51% Don't feel certification will ensure that guests act in a more sustainable way

30% Feel sustainability certifications are too expensive

27% Don't have time to look into it

23% Feel the certification process seems too complex

What can be done...

Offer a way to highlight third-party sustainability certifications and attract potential guests

Show that third-party sustainability certifications have a positive impact regardless of guest behaviour

Help partners to understand the return on investment for third-party sustainability certifications, and encourage wider support with funding

Make sustainability information simpler, help partners to find it and highlight the urgency

Begin with easy-to-achieve steps that partners can build on at their own pace to work towards third-party sustainability certifications

Working together to build a more sustainable industry

Many accommodation partners – including SMEs – consider sustainability important.

The challenge therefore isn't to convince them to make sustainability a part of their processes, it's to support them in finding the correct information and best solutions for them.

It's to make sure that all accommodation providers – regardless of size – understand that working with third-party sustainability certifications offers them the potential to:



Lower costs



Attract more guests



Future-proof against compliance changes





Many in the travel industry have big ambitions when it comes to sustainability. If we all work together to pool our resources, insights and enthusiasm we'll achieve so much more than we could separately.

As such, we're always eager to work with partners to help make the entire industry more sustainable - for the benefit of everyone.

Together, we can achieve so much more.



Methodology: Research conducted by Booking.com with a representative sample of 3,170 partners accommodation providers from 18 countries (USA, United Kingdom, Spain, Italy, Germany, France, Portugal, Austria, Croatia, Greece, Brazil, Mexico, Japan, Indonesia, China, Australia, Thailand and India).

The survey was taken online in January 2023.

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