Sustainability in tourism: Challenges, opportunities and the role of Booking.com
Sustainable tourism is a shared responsibility. As a travel leader, we recognize we have a crucial role to play in making the industry more sustainable. But to do so, we need to understand the actions that must be taken, the barriers to progress and the perspectives of our accommodation partners.

That’s why we want to create an ecosystem where we can work together to make sustainable travel a reality. Every year, Booking.com runs a number of research pieces with our accommodation partners and travelers to deduce current opinions and challenges on a range of sustainability topics. Using this research, we’ll look at:

- Attitudes towards sustainability and responsibility, both from our partners and travelers
- Blockers to action and what’s preventing both groups from doing more
- The value of sustainable certification and the barriers to achieving this
- Booking.com’s Travel Sustainable program and its role in creating a more sustainable travel future
Methodology

The research in this report comes from the following two surveys run by Booking.com:

Partner Sustainability Survey 2022

Research conducted by Booking.com with a representative sample of 3,061 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 April 2022.

Sustainability Survey 2022

Online quantitative survey, among travellers (who have booked travel in the last 12 months and intend to book travel in the next 12 months) in 32 markets (30,314 respondents in total). Respondents are 18 years or older and depending on the market up to 64 (USA, Canada, Australia, New Zealand, Spain, Italy, France, Switzerland, Great Britain, Germany, Netherlands, Belgium, Denmark, Sweden, Croatia, and Russia), 54 (Mexico, Colombia, Brazil, Argentina, Israel, India, China, Hong Kong, Thailand, Singapore, Taiwan, Vietnam, South Korea, Japan, and South Africa), or 44 (Kenya).

All data is nationally representative in terms of age, gender and region.
01
Attitudes towards sustainability

Sustainability matters to both accommodation partners and travelers.

**Accommodation partners**

Sustainability matters to most accommodation partners, with 86% saying they find it important, and 78% responding that they already have sustainable practices in place at their property.

When asked specifically in relation to minimizing water, waste and energy use, the value is considered even higher: 92% say they find it important, while the number responding ‘very important’ increased from 52% in 2021 to 57% in the latest survey.

Considering this research was conducted in April 2022, at the start of the energy crisis in many markets, these numbers may have increased further in some instances, even if for financial rather than sustainability-driven reasons.
Travelers

Sustainability matters to travelers, too – with 78% intending to stay in sustainable accommodation at least once in the coming year.

To them, sustainable travel is mainly associated with:

- Protecting the natural environment (67%)
- Reducing waste at the travel destination (58%)
- Preserving wildlife and natural habitat at the travel destination (57%)

But while both accommodation partners and travelers agree more should be done, they don’t necessarily agree on who should be doing it.
Attitudes on responsibility

Accommodation partners tend to believe it’s the responsibility of travelers to reduce the environmental footprint of tourism, while travelers tend to believe that role falls to governments.

We need more commitment from the travel industry to improve sustainable travel.
Partner Sustainability Survey, April 2022

Accommodation partners

The majority of accommodation partners (75%) agree with the statement: “We need more commitment from the travel industry to improve sustainable travel”.

But, as much as these accommodation partners believe it’s an industry-wide issue, the group they see as being most responsible for reducing the environmental impact of tourism is travelers (64%), followed by themselves (47%) and then governments (41%).

Ultimately, accommodation partners would like to see travelers playing a more active role in educating themselves on sustainability topics.
Travelers

Most travelers (66%) agree with the statement: “People have to act now and make sustainable choices to save the planet for future generations of travelers”.

But, the group they see as most responsible for reducing the environmental impact of tourism is governments (37%), with less than a third (29%) saying it falls to travelers themselves.

However, 28% of travelers don’t see responsibility as a consideration when traveling by agreeing that “I live sustainably in my everyday life, so I don’t have to be sustainable when I travel”.

When specifically asked about the steps they’ve taken while traveling to reduce their environmental impact, the most common actions were:

- 38% Turning off the air con when they weren’t there
- 35% Reusing their towel to cut down on washing
- 28% Avoiding single-use items provided by the accommodation (e.g. mini shampoo bottle, toothbrush, etc.)
- 24% Opting out of daily cleaning to save water
03 Blockers to action

Financial concerns and information gaps are some of the key blockers to the adoption of sustainable practices.

Accommodation partners

The blockers that prevent accommodation partners doing more around sustainability are primarily practical and financial:

- 39% The cost of the investments needed is too high
- 30% Building-related limitations (e.g. historic building)
- 30% Difficult to find viable sustainable alternatives to products/services currently used
- 24% Not sure what return on investment (more) sustainable practices will bring
- 21% Don’t know which (other) sustainable practices to implement next
Travelers also share practical and financial concerns, including:

- There aren’t enough sustainable options available: 47%
- Sustainable options are too expensive: 38%
- I don’t know where to find sustainable travel options: 37%
- I don’t trust the travel options labeled as sustainable are truly sustainable: 34%
- I don’t know how to make my travel more sustainable: 31%

However, there’s also another subset of traveler concerns – the fear of missing out:

- My vacations are a special time when I want to escape and relax, without thinking about sustainability: 35%
- Although I see more sustainable travel options, others tend to appeal more to me: 32%
- Sustainable travel doesn’t provide the luxury/comfort I want on vacation: 27%
The value of certification

Certification is a powerful tool in the move towards a more sustainable industry, but it’s one that comes with some complexities.

Certification provides accommodation partners – and the wider industry – with a reliable source of validated actions they can take when it comes to sustainability. Then, it gives travelers a credible standard so they can trust claims being made.

Accommodation partners say that the key perceived benefits of certification are that it:

- 48% Generates cost savings (e.g. lower water/electricity costs)
- 47% Helps attract more guests interested in sustainability
- 45% Reassures guests sustainability claims are credible
There's an appetite from travelers for recognisable standards too, with respondents saying they:

64% Would be interested to learn more about why a specific accommodation received a sustainable certification

61% Believe that all accommodation providers should use the same sustainable certification

Booking.com’s Travel Sustainable Program is designed to help our accommodation partners progress on their sustainability journey towards certification. By providing information on the sustainability efforts being taken at specific accommodations, the program also encourages travelers to factor sustainability into their decision-making process.
We have identified five key blockers to certification adoption that need to be addressed.

1. Awareness

One of the key blockers for accommodation partners is awareness.

Over a third of accommodation partners surveyed (36%) said they’ve never heard of certification. While this figure is down from 42% in 2021, it still shows that many accommodation partners don’t know that third-party certification could help the environment – and their business – to thrive.

The number of people who are aware is moving in the right direction, but there’s still plenty of work left to do.
2. Practical concerns
Of the accommodation partners who haven’t considered getting certified:

- Nearly a third (30%) feel they don’t have time to look into certification.
- 29% believe it’s too expensive.
- 24% believe the process is too complex.

Ultimately, they need reassurance that the process is faster, simpler and more affordable than they realize.

3. Return-on-investment concerns
As energy prices have increased, the potential for cost savings from sustainability has become clearer for many. But accommodation partners need reassurance that - even in 'normal' times - the effort and resources invested in sustainability practices and certification can have a credible return on investment.

Previous research we’ve run with EY Parthenon and OC&C strategy consultants looked at 24 specific sustainability measures and found that over half (around 58%) can result in lower costs over a 15-year investment period.

Of those accommodation partners who don’t consider getting certification, 46% don’t believe it will bring more guests. However, in the traveler survey we found that 39% of travelers said they would be willing to pay extra for accommodation if they knew it had a sustainable certification.

If accommodation partners have tangible evidence that certification could lead to lower costs and higher rates, it could become a higher priority for them.
4. Access to the right resources

When we asked accommodation partners what we can offer to help them get certified, their responses were:

- 78% Provide a checklist showing the steps to get a sustainability certification
- 41% Provide indications of investments, cost savings and return on investments related to getting a certification
- 35% Recommend independent certification bodies

Cross-industry and government collaboration is crucial to provide the right resources and information to help accommodation partners take steps towards sustainability.
5. Support to educate guests

The industry also has a role to play in reassuring travelers that sustainable can still mean luxurious and that they aren’t sacrificing anything by behaving more sustainably. For many they’re actually adding value by having a local, authentic trip.

But empowering accommodation partners to educate guests will be just as important, too. The survey showed that 43% of them feel a blocker to certification is that it doesn’t ensure that guests will act in a sustainability-conscious way.

By offering insights into how to encourage more sustainable guest behavior, partners can feel reassured that all their hard work won’t be undone by indifferent guests.
In summary

According to the results of our surveys, we’ve seen:

- That accommodation partners and guests both want more to be done on sustainability.
- That both see effective sustainability measures as valuable to them personally - if done correctly.
- That both are open to - or even eager for - help when it comes to sustainability.
- That while certification can help to address concerns on both sides, many of the current options aren’t getting the pick up needed.

But one solution we believe can effectively support accommodations to become more sustainable is our Travel Sustainable program.
Travel Sustainable – and how we can work together to do more

At Booking.com, we want to make it easier for everyone to experience the world. We also believe we have a responsibility to make sure there is always a world worth experiencing.

We have seen that the process of certification can come with challenges for accommodation partners. To achieve a more sustainable travel industry, there is a need to address these challenges and ensure partners and travelers recognize the benefits of certification. This is why we developed the Travel Sustainable program to help:

- Reduce waste
- Reduce energy and greenhouse gasses
- Protect nature
- Use less water
- Support the local community
Travel Sustainable is designed to help bridge the gap between where accommodation partners currently are, and where they need to be.

It does this by addressing those fundamental blockers we know accommodation partners face by educating them, supporting them, and reassuring them that it’s worth the effort.

The most effective properties can even earn the Travel Sustainable badge – helping them to display their credentials to prospective guests and stand out from the crowd – in a way that’s uniform, clear, easy to communicate, and affordable.

It also supports travelers by providing them with a list of properties that are taking action to improve sustainability.
Collaboration across the industry

We create a lot of resources (like the Travel Sustainable Handbook) to help drive change. But we know that one of the strongest ways we can help travelers and partners to make more sustainable choices is collaborating with others. Such as, we work with United Nations World Tourism Organisation (UNWTO) to provide partners with expert insights on sustainable tourism practices, and The Global Sustainable Tourism Council are a key contributor to our partner handbook and our Travel Sustainable programme.

We know this is something accommodation partners want, too:

- **69%** agree Booking.com has a role to play in educating guests about adopting sustainable practices while visiting accommodations.
- **62%** agree They’re interested in learning from Booking.com about the topic of sustainability.
- **60%** agree They’d trust advice from industry experts that Booking.com partners with on how to make their property more sustainable.

Creating a more sustainable tourism industry is a shared responsibility. At Booking.com we are committed to fully playing our role and working collaboratively with others in the travel ecosystem to achieve this goal.

Learn more about our sustainability efforts.