GLOBAL BUSINESS TRAVEL ASSOCIATION

The State of Sustainability in the Global Business Travel Sector

Perceptions, priorities, and opportunities to guide a greener future for business travel

April 2022

Executive Summary

Business travel brings people together and fosters economic growth within and across national boundaries. For this to continue, however, **the industry must ensure people can effectively connect in-person and conduct business globally while doing what is right for society and the planet.** The need to address sustainability has grown steadily in the sector in the past few years and is now a shared concern for business travel buyers and suppliers and across the industry ecosystem for business travel buyers and suppliers and the industry overall.

This study presents the collective results of **GBTA research efforts** conducted from January to March 2022 with industry professionals and external stakeholders such as policy makers, think tanks and NGOs to **benchmark the state of sustainability in the global business travel sector and identify key challenges and opportunities** to chart the course towards a more sustainable future for business travel.

DESTINATION SUSTAINABILITY

The Global Business Travel Association (GBTA) has embarked on a sustainability journey to **champion collaborative efforts and accelerate the transition to sustainable business travel.** To identify opportunities to guide a greener future for the sector, GBTA partnered with Grayling, a global public affairs consultancy, to survey, analyze, and benchmark the perceptions and priorities of global business travel industry professionals as well as external stakeholders. **(Chapter 1)**

EMBARKING ON THE JOURNEY

The results show the business travel sector worldwide views **addressing climate change as the number one priority area for action** (88%), even while turning this sense of urgency into sustainable travel policies remains complex and with many barriers. As a result, a mutual perception exists among both the business travel sector and external stakeholders that **the industry has not done enough on sustainability within the sector.** The **challenges include higher costs associated with sustainable travel options** (82%) and the **lack of transparent sustainability data** (63%). To overcome these hurdles, the industry respondents see improved access to sustainability data (63%) and a change in the industry culture (63%) as the top facilitators. **(Chapter 2)**

EXISTING BEST PRACTICES

We can, however, expect the industry to do increasingly more in the future, as most travel programs already have the infrastructure in place to support the adoption of sustainable travel policies that turn the ambition into action. Six in ten (60%) industry respondents reported having both a sustainability team and a **sustainability program in place to address corporate environmental performance. (Chapter 3)**

OPPORTUNITIES FOR CHANGE

For the sustainability journey to be realized, the business travel industry needs to enact credible sustainable business travel practices. Seventy-six percent (76%) of **travel buyers have either already incorporated or are planning to incorporate sustainability objectives in their travel policies. Business travel suppliers will increasingly be challenged on emissions reductions** — both through energy efficiency gains (74%) and clean energy use (68%) — and waste management (72%), as these rank as the most important corporate travel policy concerns for travel buyers. Concurrently, topping the list as the most impactful actions for industry stakeholders: **selecting energy efficient hotels and event venues** (81%), **working with suppliers with green certification** (78%), and **booking flights that use sustainable aviation fuels** (73%). Prioritizing routes with the smallest CO2 footprint is also seen as a highly effective measure by external stakeholders (96%). **(Chapter 4)**

TRAVELING TOGETHER

While results show the industry is willing to improve its environmental performance, **collaboration and multi-stakeholder partnerships are needed to impact change at the speed and scale needed.** To make improvements possible, 90% of industry respondents say GBTA should guide the industry on its journey. **(Chapter 5)**

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CHAPTER 1

Defining Sustainable Business Travel

DESTINATION SUSTAINABILITY

Environmental sustainability has emerged as the topic of our times — from increasing civil society action to government regulations to business initiatives — to help limit global warming to 1.5 degrees Celsius, in line with the Paris Agreement.[1]

At its core, **sustainability means meeting the needs of the present without compromising the ability of future generations to meet their needs.**[2] Businesses have embraced this challenge by acknowledging their environmental and social responsibility. **For the global business travel industry, this means enabling people to connect and conduct business while doing what is right for society and the planet.**

In this context, GBTA has embarked on a journey to actively facilitate a path to more sustainable business travel. Business travel supports economic growth, regional cohesion and human connectivity. It brings sales professionals to their customers, engineers to their sites, artists to their audiences, and diplomats to the table of international negotiations. But **maintaining such global mobility involves getting a grip on carbon emissions which threaten the planet and humanity.**

> "Sustainability must be a cultural and financial commitment and not just when it's a hot issue with customers."
>
> **BUYER, UNITED STATES**

The need to make business travel more sustainable has grown steadily and did not go away with the pandemic that halted travel for almost two years between March 2020 and March 2022. Protecting the planet is a shared concern for travel buyers and suppliers — demonstrated by a **strong majority (89%) of global respondents stating that sustainability is a priority for their company.** Regardless of region, the emphasis on sustainability is strong, ranging from 99% in Asia Pacific and 97% in Europe, to 91% in Latin America and 84% in North America.

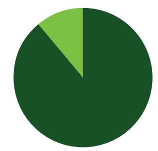
1 The Paris Agreement is a legally binding international treaty on climate change: https://unfccc.int/process-and-meetings/the-paris-agreement/the-paris-agreement

2 United Nations (1987) Report of the World Commission on Environment and Development: Our Common Future [Available at: http://www.un-documents.net/our-common-future.pdf]

WHAT are the categories — or "SCOPES" of emissions?

SCOPE 1	SCOPE 2	SCOPE 3
Direct company emissions	Emissions indirectly caused by a company's energy use	Emissions from a company's value chain
EXAMPLES		
Fuel consumption by a transport company	Emissions from the generation of electricity and heating purchased by a company	Emissions from the transportation of employees for business-related activities (**business travel**)

The $1.4 trillion[3] global business travel industry stands at the crossroads of corporate scope 3 emissions and the direct scope 1 emissions of the transportation and accommodation industries.[4] As the focus on reducing emissions generated by travel intensifies, it is essential for stakeholders across the business travel value chain to work together to chart the course towards a more sustainable future. This includes several elements of the business travel journey from decarbonized aviation to energy efficient hotel rooms. This landmark industry benchmarking study and its underlying surveys are designed to serve as an essential building block in GBTA's sustainability efforts for the business travel industry.



89%

On everyone's mind — Sustainability is a priority for 89% of the industry

GATHERING DATA FROM ACROSS AND BEYOND THE INDUSTRY

For the primary part of the study, from January and March 2022 GBTA collectively surveyed **762 global industry professionals which included GBTA constituents from four regions** — Europe, North America, Latin America and Asia Pacific — regarding their views and requirements on how to best incorporate sustainability into business travel programs.

Specifically, the industry survey sought to:

1. uncover the current state and **priorities of the business travel industry** regarding sustainability.
2. ascertain perspectives on the **opportunities and challenges** associated with the sustainability journey, and
3. identify how GBTA can best support its members and stakeholders with **actions and tools** on sustainability.

[3] Pre-pandemic U.S. dollar figures (2019)
[4] Emissions categorization system developed by the GHG Protocol emissions accounting tool. More information at: https://ghgprotocol.org/

WHERE are the respondents based?

57%
North America

34%
Europe

6%
Central and Latin America

2%
Asia Pacific

2%
Africa and Middle East

The primary survey respondents fall into two main groups:

- **Corporate travel managers ("buyers"):** Professionals who work at companies across virtually every industry and perform critical corporate travel management roles such as designing travel policies, negotiating discounts with airlines and hotels, implementing technology, and safety and duty of care for their traveling workforce.
- **Travel suppliers ("suppliers"):** Professionals who work for travel companies such as airlines, hotels, rental car companies, and travel management companies in a variety of roles including executive leadership, sales, marketing, and product strategy.

The primary **industry survey received an almost even share of response from travel buyers and suppliers. Travel industry supplier verticals are also evenly represented**, with 31% from the hospitality sector, 27% from the transportation sector (aviation, rail, and ground transportation), 14% from intermediaries such as online booking tools and travel management companies, and 29% identifying as other sectors, including consultants and analysts working in the business travel industry.

The second survey GBTA conducted consisted of **100 relevant external stakeholders including policymakers, think tanks, non-profit organizations, and international organizations** to strengthen its understanding on the perceptions of the sector from the outside.

Specifically, the secondary survey sought to:

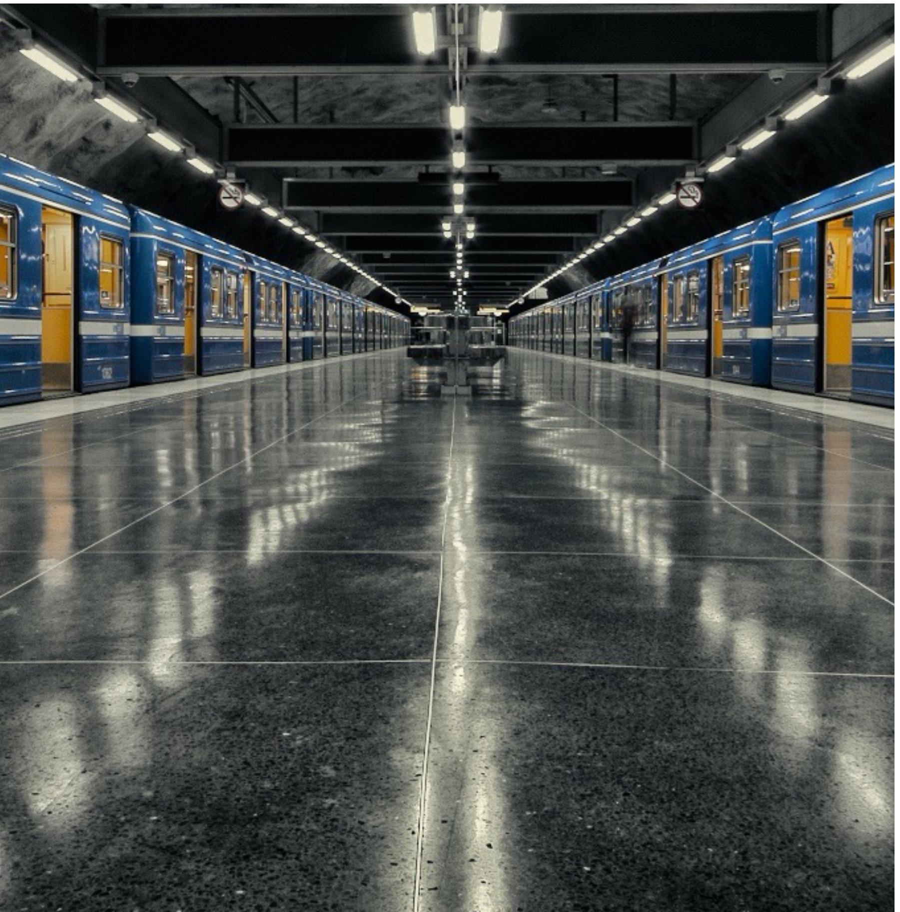
1. gather information on the **external perceptions and expectations** on business travel sustainability, and
2. identify **credible sustainability practices for the business travel industry** from a broader, cross-industry point of view.

The external stakeholders represent a **mix of awareness of the business travel industry — half (48%) indicated familiarity with the sector** while the remaining half (52%) admit to being not very or not at all familiar with the industry.

GBTA partnered with Grayling to prepare this report and provide comprehensive analysis of the survey results.

CHAPTER 2

Embarking on the Sustainability Journey



INDUSTRY PRIORITIES

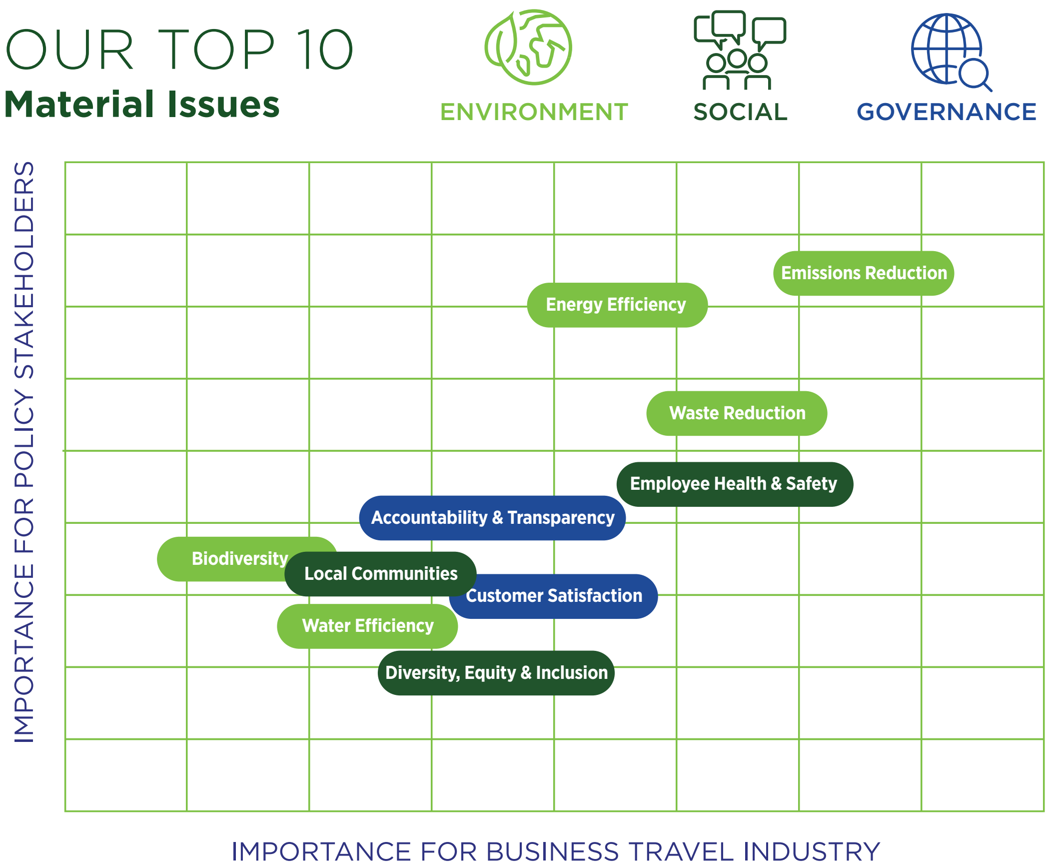
A key objective of the surveys was to identify the top environmental, social, and governance (ESG) priorities of both industry and external respondents. **Responses were used to develop a matrix of the top 10 material sustainability issues for the sector across all ESG pillars.** This materiality assessment places **emissions reduction as the most critical issue to be tackled by the business travel sector**, based on its importance for both industry and external stakeholders.

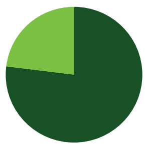
There is a strong agreement across the business travel industry that it must prioritize decarbonization as an immediate priority. Achieving emission reductions is ranked as the top priority for both business travel buyers (90%) and suppliers (85%).

Beyond its carbon footprint, the industry is also concerned about its broader environmental impact: 83% of respondents rank waste reductions — and single-use plastics in particular — as a top priority for the next two to three years.

These priorities show a strong recognition within the business travel sector and external stakeholders that rapid action needs to be taken to ensure the long-term feasibility of business travel and economic mobility.

OUR TOP 10 Material Issues





77% of the industry say raising awareness among employees, clients, and stakeholders is a key priority

ESG — UN Sustainable Development Goals

ESG						
ENVIRONMENTAL	6 Clean Water and Sanitation	7 Affordable and Clean Energy	12 Responsible Consumption and Production	13 Climate Action	14 Life Below Water	15 Life on Land
GBTA members' priority	19%	43%	50%	55%	3%	5%
SOCIAL	1 No Poverty	2 Zero Hunger	3 Good Health and Well-Being	4 Quality Education	5 Gender Equality	8 Decent Work and Economic Growth
GBTA members' priority	3%	6%	27%	11%	33%	33%
GOVERNANCE	9 Industry, Innovation and Infrastructure	10 Reduced Inequalities	11 Sustainable Cities and Communities	16 Peace, Justice and Strong Institutions	17 Partnerships for the Goals	
GBTA members' priority	52%	19%	28%	4%	37%	

Environmental issues are a key concern for respondents, compared to social sustainability or sustainable governance which are considered to be less immediate priorities. **This demonstrates a sense of urgency to deliver on net zero commitments and relates to the growing pressure from customers and investors on companies to act on their environmental footprint.**

The strong focus on environmental sustainability is also evident in the industry's views on the United Nations Sustainable Development Goals (SDGs).[5] The U.N. SGDs provide a framework for companies to structure their sustainability activities and objectives along internationally recognized sustainability targets and metrics. In the survey, the business travel sector identified **climate action (Goal 13), responsible consumption and production (Goal 12), and affordable and clean energy (Goal 7) as the three SDGs where the industry can have the biggest impact.**

> "Now is the time to introduce these new changes in sustainability. The world has been working through a major crisis and everyone is expecting change on the re-awakening."
>
> **BUYER, FRANCE**

[5] For more information on the UN SDGs, please see: https://sdgs.un.org/goals

WHAT do you see as the main barriers for a sustainability transition in the business travel sector?

INDUSTRY		RANK		EXTERNAL STAKEHOLDERS
Higher costs	82%	1	62%	Lack of interest from some industry stakeholders
Lack of data and access to transparent information	63%	2	58%	Higher costs
Lack of clarity on environmental regulations	49%	3	41%	Longer travel times
Lack of interest from some industry stakeholders	48%	4	41%	Lack of financial incentives
Competing priorities within departments	44%	5	39%	Lack of data and access to transparent information
Lack of financial incentives	42%	6	38%	Competing priorities within departments
Fragmentation of standards	38%	7	36%	Lack of clarity on environmental regulations
Loss of traveler comfort	34%	8	26%	Fragmentation of standards
Longer travel times	32%	9	22%	Loss of traveler comfort

"Many companies are not yet aware that sustainability is not just a cost but also brings competitive advantages."

BUYER, GERMANY

PERCEIVED BARRIERS

While GBTA's data demonstrates the business travel sector has identified the fight against climate change as a priority area for action, managing and reducing the environmental impact of business travel remains incredibly complex. **Higher costs are seen as the main barrier to the sector's sustainability advancement**, reported by both 82% of business travel buyers and suppliers. Buyers (68%) were significantly more likely to view the lack of data and access to transparent information as a barrier.

Regional differences can also be found. **North America respondents are more likely to worry over the higher costs** associated with sustainable travel compared to those in Europe (84% vs. 77%), while **Europeans are more likely to be concerned about the lack of available sustainability data** to support the transition (70% versus 61%). In addition, industry **respondents from Latin America** (69%) **are significantly more likely to highlight the lack of interest from stakeholders** within the industry than their counterparts in Europe (46%) and North America (46%).

Almost two-thirds (62%) of the **external respondents perceive a lack of interest from some business travel industry stakeholders as a main barrier**, ranking it the number one problem among those with an outside perspective to the business travel industry. Many external stakeholders (58%) also highlight the role of higher costs in hindering change. Interestingly, longer travel times are more likely to be seen as a barrier by those outside the business travel industry (41%) than by the industry respondents (32%).

"Not having industry standards holds the industry back short-term due to a lack of data. If you don't know what your emissions are, how can you put in a plan to reduce them."

SUPPLIER, UNITED STATES

MAIN BARRIERS AND FACILITATORS towards a green transition, as ranked by the business travel industry

BARRIERS	RANK			FACILITATORS
Higher costs	82%	1	63%	Culture change within the industry
Lack of data and access to transparent information	63%	2	63%	Better/easier tracking of data
Lack of clarity on environmental regulations	49%	3	60%	Harmonized standards
Lack of interest from some industry stakeholders	48%	4	57%	Scaling up of innovation and technology
Competing priorities within travel departments	44%	5	56%	Sharing of best practice
Lack of financial incentives	42%	6	53%	Accountable and time-bound sustainability targets
Fragmentation of standards	38%	7	46%	Advocating for cost-efficient environmental regulations
Loss of traveler comfort	34%	8	40%	Public incentives
Longer travel times	32%	9	29%	Stricter criteria for green incentives

Among external stakeholder categories, different issues are perceived as the biggest barriers for the business travel industry to incorporate more sustainable practices. **NGOs and think tanks see the lack of financial incentives as the main barrier** (71%), while **policymakers perceive longer travel times as the key issue** (60%). It is also telling that **none of the policymaker respondents see the lack of financial incentives as a key barrier for the sustainability transition.**

REMOVING BARRIERS

Going forward, the industry needs to scope its willingness to internalize some of the costs associated with the transition to sustainability, while also raising awareness that choosing sustainability does not automatically lead to higher costs. There are indeed opportunities to achieve operational and resource efficiencies as well as brand value and improved employee retention benefits from sustainable policies. For example, promoting the use of energy and water-efficient buildings for hotels or fuel-efficient transportation (such as aircrafts using sustainable aviation fuels) may offer significant investment returns over time. **The sustainability journey is also a transition from short-term views to a mindset of long-term value creation.**

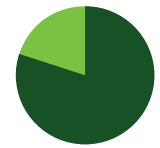
The results also demonstrate the **value of partnerships in the transition**, as the issues over financial burden-sharing and data availability are best addressed through collaboration across the business travel value chain and between private and public stakeholders. **Governments have an important role to play to avoid the final costs of the transition falling unfairly onto the consumer — and to make sure that sustainable mobility remains affordable.** Public incentives can accelerate the uptake of innovative technologies that reduce emissions, such as electric vehicles or sustainable aviation fuels. Public intervention is also critical to help harmonize standards and promote transparency in calculating, tracking and disclosing emissions data.

These conclusions are supported by the perception that **the two most effective ways to help the sector accelerate its sustainability journey are achieving a culture change within the industry and ensuring better data tracking.**

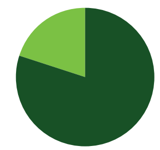
CHAPTER 3

The State of Sustainability in the Industry

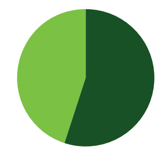
EXISTING SUSTAINABILITY PRACTICES



80% Have a sustainability program and/or a sustainability team



76% Incorporate or are planning to incorporate sustainable practices in their travel policies



55% Measure the environmental impact of their company's business travel

The sustainability journey within the business travel sector is not just emerging: 60% of the global business travel industry report having both a sustainability team and a sustainability program in place to address corporate environmental performance. An additional 20% within the industry report having either a sustainability program or a sustainability team.

Although **only 38% of business travel buyers say they currently incorporate sustainability practices in their travel management policies,** the prevalence of broader sustainability structures will support the sector's transition and the inclusion of sustainability in corporate travel. GBTA's survey data also reveals a growing appetite among travel buyers to do so, as **a further 38% are already planning to adopt sustainable travel policies in the near future,** which would bring the total share of business travel buyers incorporating sustainability into their travel policies to 76%.

A majority of the industry is already measuring (55%) and reporting (56%) on environmental impact of their business travel activities, while a further 17% and 19% respectively have plans in place to incorporate these practices into their programs in the future. As a quintessential scope 3 emission category, **we can expect the levels of climate reporting on business travel activities to grow as companies expand their non-financial reporting practices** and as binding disclosure requirements are established on supply chain emissions in countries around the globe. [6,7]

[6] For the proposed US rules on the standardization of climate-related disclosures for investors, please see: https://www.sec.gov/rules/proposed/2022/33-11042.pdf

[7] For the proposed EU rules on corporate sustainability reporting, please see: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52021PC0189

> "Although there's still work to be done and improvements to be made, the past couple of years have shined a light on the importance of climate change, which has pushed travel suppliers to make even greater commitments to this effort and to their corporate clients."
>
> **BUYER, UNITED STATES**

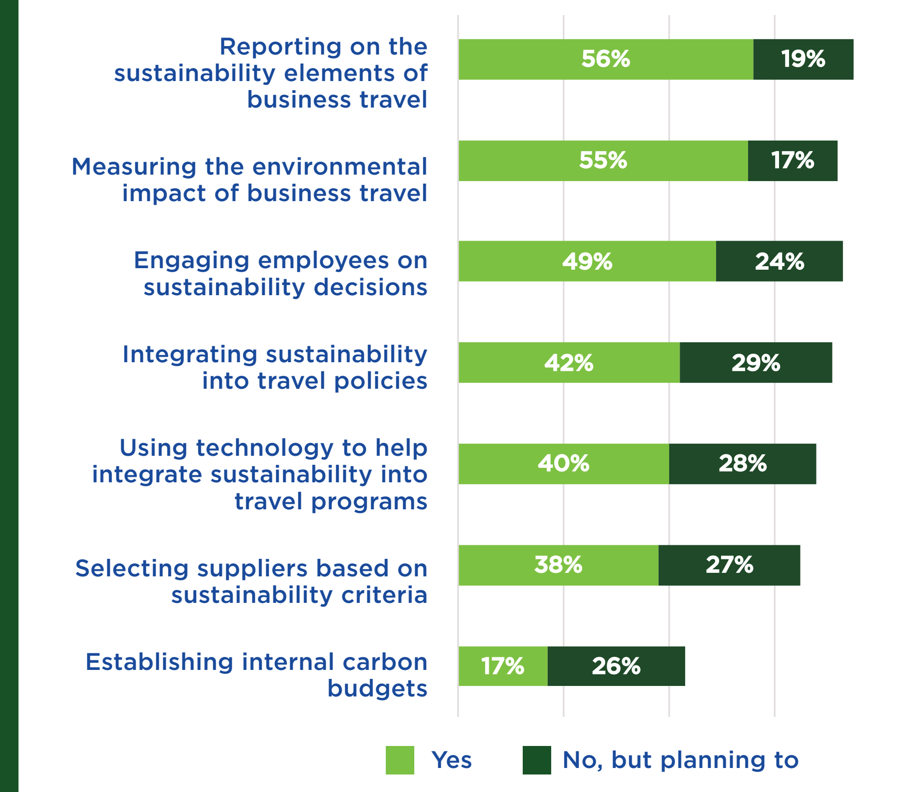
The increase in tracking and reporting is particularly important for improving the environmental performance of business travel, as accurate and available emissions data are needed to set credible and realistic reduction targets. Information is also the key to communicating progress to external stakeholders.

While the industry has been increasingly focused on sustainability, **a lot still needs to be done to convert this interest into action, as over one-third (36%) of the industry respondents view the sector's sustainability performance as either slightly or not at all advanced.** This illustrates the need for the industry to come together and make use of the growing push for more ambitious climate action to successfully integrate sustainability into the everyday practices of business travel.

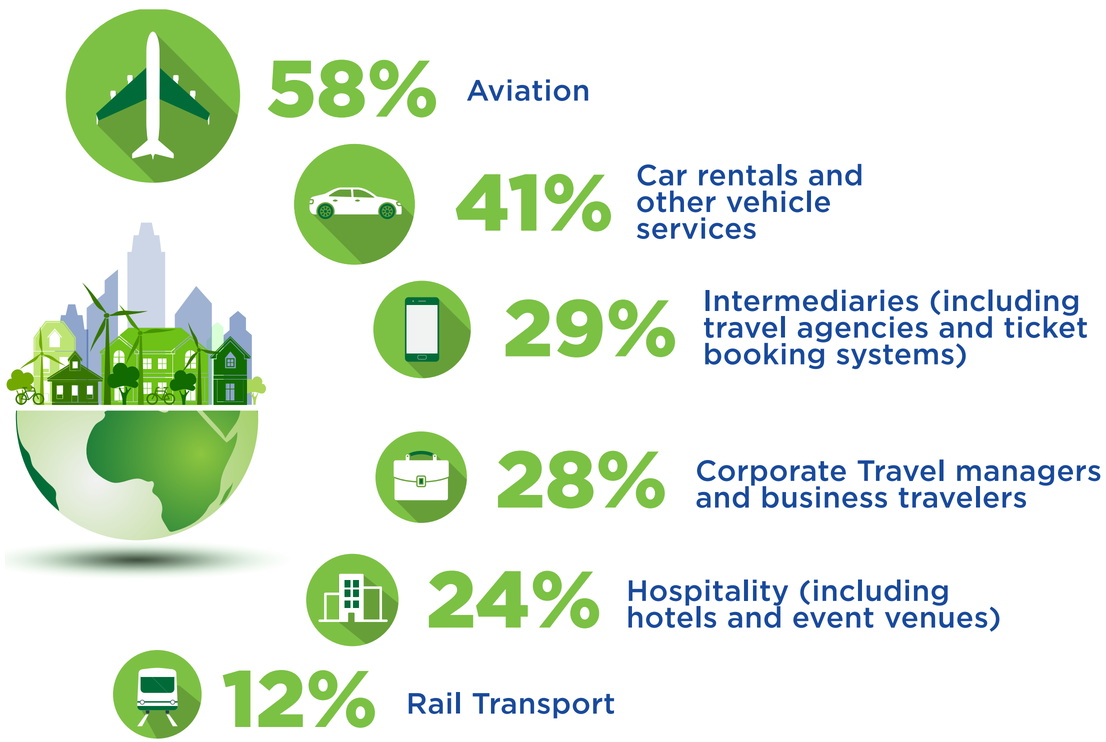
As things stand, only 14% of the industry respondents say that the industry is currently well advanced or better when it comes to sustainability. In the next few years, however, we can expect this to change dramatically. As demonstrated by the results of existing sustainability practices (see graph on page 11), many companies have begun — or are planning to begin — taking steps such as reporting on the sustainability elements of business travel, measuring the environmental impact of business travel, and engaging employees on sustainability-driven travel decisions.

Key examples of practices dependent on accurate sustainability data include the least common activities among the industry stakeholders, namely selecting suppliers based on sustainability criteria (38%) and establishing internal carbon budgets (17%). It is therefore not a surprise that **these practices are expected to see the largest relative increase in the coming years.**

EXISTING Sustainability Practices



BUSINESS TRAVEL segments with the most urgent need to improve their sustainability performance, according to the external stakeholders



> "The investments and policy shifts required to radically decarbonize the travel industry are not materializing fast enough."
>
> **NGO, UNITED STATES**

EXTERNAL PERCEPTIONS

External stakeholders also see a need for the business travel sector to improve its performance on sustainability. A majority (57%) view the business travel sector as "slightly advanced" (30%) or "not at all advanced" (27%) on sustainability. Within different organizations, this perception varies from 50% among policymakers to 77% among NGOs and think tanks.

A similar majority of the external respondents (58%) also perceive the aviation sector as in need of the most urgent push on sustainability. More than a quarter (28%) of policy stakeholders pinpoint the need for travel managers and individual business travelers to improve their sustainability performance.

As mentioned in Chapter 2, external respondents see a lack of interest from some industry stakeholders as the single biggest barrier (62%) for the sector's sustainability transition. The results of the industry's survey, however, show that this is no longer the case. **Industry players have started moving in the right direction but likely not at the speed and scale expected by external stakeholders, especially NGOs.**

It is also clear **the transition must be accompanied with transparent communication from the industry to raise awareness on the progress and achievements for greening business travel in the minds of the external stakeholders.** As explained by one respondent from a trade association outside the business travel sector: "Although I am aware of a willingness of business travel players to get more sustainable, I am not aware of industry-wide initiatives in this regard."

> Business travel has a certain stigma on it, since it doesn't always seem necessary to travel for a short meeting across the globe instead of [a virtual] meeting."
>
> **POLICYMAKER, FINLAND**

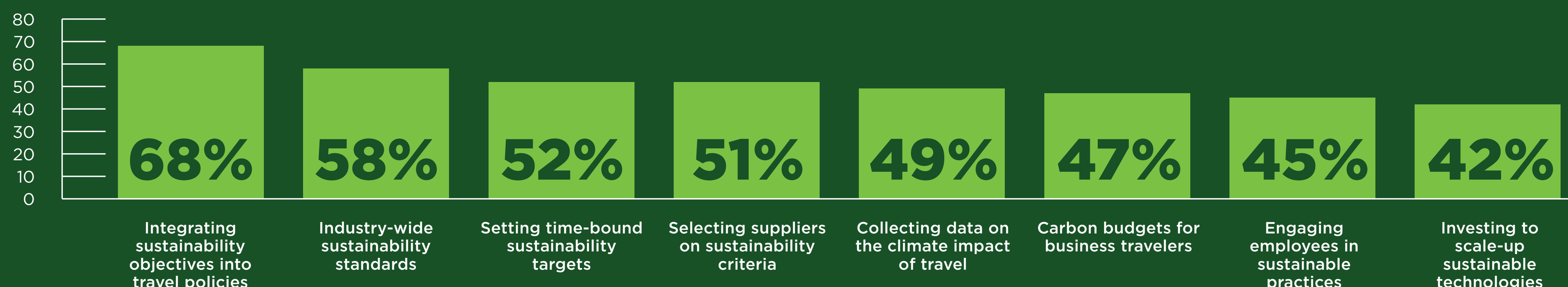
> I think there are signs that a change is coming towards a more sustainable development of the business travel sector, but slowly."
>
> **THINK TANK, NORWAY**

Openness and active collaboration with policymakers, non-governmental organizations, researchers, and others on the opportunities and challenges of sustainable business travel is essential for correcting any external misconceptions about the sector's willingness to act on its environmental performance.

In addition to transparency, the sustainability journey must be driven by credible action to avoid "greenwashing," i.e., giving a false impression of the extent of the industry's environmental actions and soundness.

From the external perspective, successfully integrating sustainability goals into travel policies is perceived as the most credible action to drive sustainability in the industry (91% of the external respondents), followed by establishing industry-wide sustainability standards (89%) and selecting suppliers based on sustainability criteria or certification (88%).

The most EFFECTIVE INDUSTRY ACTIONS to drive more sustainable travel practices according to the external stakeholders



CHAPTER 4

Opportunities for Practical Change

HOW TO: SUSTAINABLE TRAVEL MANAGEMENT

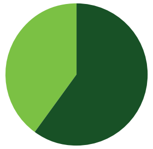
Having identified the key priorities, challenges, and existing practices of sustainable business travel, it is important to understand what the business travel industry needs to become more sustainable in practice.

For the industry respondents, the **most requested travel policies (to be either mandated or encouraged) as a part of a sustainable travel program** are:

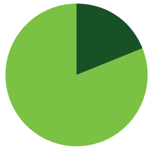
1. giving **preference to energy efficient accommodation and event venues** (81%),
2. prioritizing **suppliers with recognized sustainability certification** (78%), and
3. booking **flights that use sustainable aviation fuels (SAF)** (73%).

Prioritizing flights with SAF and suppliers with sustainability certification (recognized green labels and ratings provided to suppliers and/or their products) are also listed as the most impactful travel policies by the external respondents.

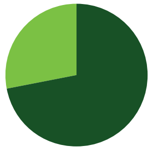
From the outside perspective, policies on energy efficiency are surpassed by **encouraging or mandating the booking of routes with the smallest CO2 footprint.** The alignment on key policies indicates the business travel industry is already looking towards the most credible activities to improve its environmental performance and standing.



60% **of the industry supports reducing the frequency of business travel**



19% **of the industry wants to make the sourcing of suppliers with sustainability certification mandatory**



72% **of the industry says a sustainable travel program should prioritize routes with the smallest carbon footprint**

Which of the following TRAVEL BEHAVIORS should be encouraged or mandated as part of a green travel program?

INDUSTRY		RANK		EXTERNAL STAKEHOLDERS
Giving preference to energy efficient hotels and event venues	81%	1	96%	Prioritizing routes with the smallest CO2 footprint
Prioritizing suppliers with recognized sustainability certification	78%	2	94%	Prioritizing suppliers with recognized sustainability certification
Prioritizing flights that use sustainable aviation fuels (SAFs)	73%	3	90%	Prioritizing flights that use sustainable aviation fuels (SAFs)
Prioritizing routes with the smallest CO2 footprint	72%	4	90%	Prioritizing the use of public transportation over single passenger/small group transport
Offsetting emissions by investing in environmental projects	70%	5	89%	Prioritizing the use of electric vehicles instead of hybrid or conventional cars
Prioritizing the use of electric vehicles instead of hybrid or conventional cars	67%	6	88%	Giving preference to sustainable food options
Prioritizing the use of public transportation over single passenger/small group transport	67%	7	86%	Giving preference to energy efficient hotels and event venues
Giving preference to sustainable food options	67%	8	82%	Switching from air travel to other modes of transportation
Reducing the frequency of travel	60%	9	80%	Reducing the frequency of travel
Switching from air travel to other modes of transportation	58%	10	72%	Offsetting emissions by investing in environmental projects

> "No travel is no solution, we need to push [each] sector to innovate faster, create scalable solutions and approaches."
>
> **BUYER, GERMANY**

Traveling less?

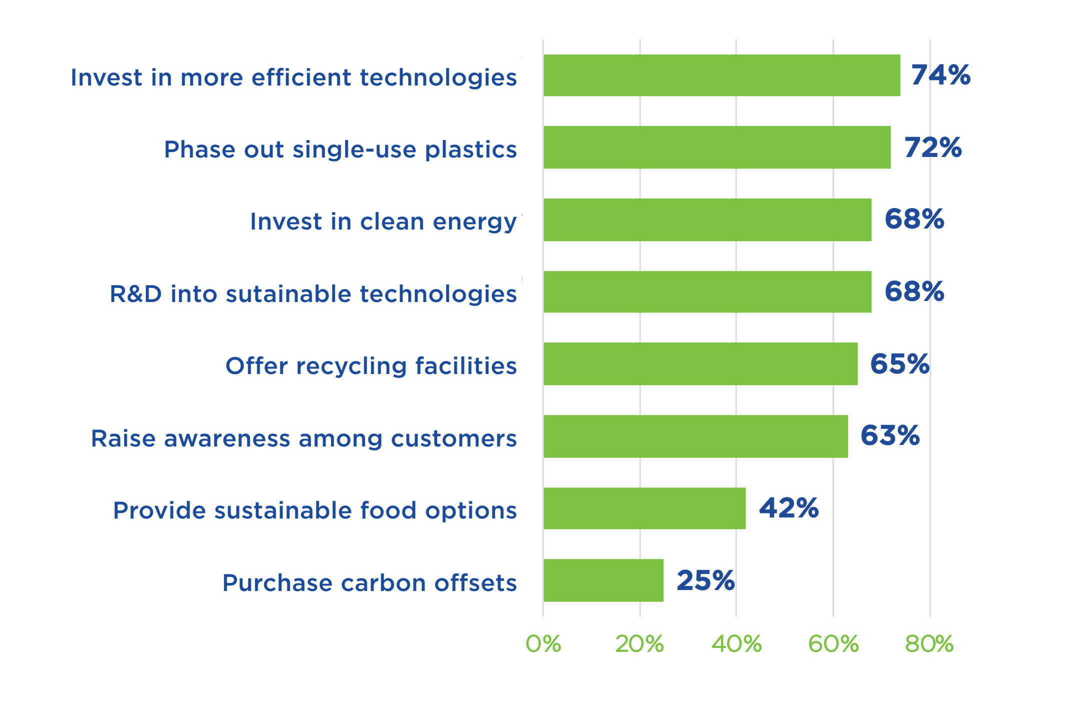
When it comes to sustainable business travel policies, **the main divergence between buyers and suppliers (as well as among regions) relates to two issues in particular: multimodality and the frequency of travel.** For example, seven in ten (73%) business travel buyers support either encouraging or mandating taking fewer trips as part of a sustainable travel program, while 60% of suppliers do not encourage this blanket reduction in travel. Regionally, **Europeans are also significantly more likely than other regions to support the notion that traveling less should be encouraged or even mandated.** "Business travel could be leading in sustainability versus lagging," explained a supplier from the Netherlands. "Perhaps admit that we should be traveling less overall for as long as air travel has such a high impact."

Traveling better.

Opinions also diverge when it comes to encouraging or mandating multimodal travel, namely switching from air travel to other modes of transportation. The figures are similar between travel buyers and suppliers as with the issue of travel frequency, but regionally the gap in opinions is even more pronounced on multimodality. Indeed, **Europeans are six times more likely than North Americans to support mandating multimodal travel options** — a view that is likely influenced by the availability of feasible domestic and cross-border rail alternatives in many European countries.

These figures are closely linked to the broader discussions on the role of technology within the business travel sector. **As the industry emerges from the pandemic, it has an opportunity to draw lessons from the crisis and consider where the growing use of digital tools to organize virtual and hybrid meetings falls within the business travel ecosystem.**

The most impactful EFFORTS BY SUPPLIERS to improve their sustainability according to travel buyers



> "I feel most of the work has been around offsetting but that has begun to change."
>
> **SUPPLIER, CANADA**

For example, a buyer from Germany encouraged the industry to "find the right balance between face-to-face and online meetings, keeping in mind that online does not mean carbon neutral either."

In this context, the survey results suggest that the **business travel sector must provide answers to the calls for less travel and the prioritization of low-CO2 transport modes over cheaper or shorter routes.** An open conversation is needed on how to best incorporate these measures into future sustainable travel programs.

HOW TO: SUSTAINABLE SUPPLIERS

Almost three quarters (74%) of the industry respondents rank both **investing in more energy efficient technologies and phasing out single-use plastic products as the most impactful ways for business travel suppliers to improve their environmental performance.** These results further demonstrate not only the clear prioritization of emission and waste reductions as already indicated in Chapter 2 but also the role assigned to achieving energy efficiency within the sector — the most impactful action for both travel buyers and suppliers.

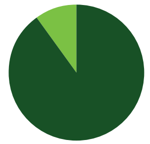
The clear emphasis on reduction of emissions and plastic waste is further strengthened by the fact that **investing in clean energy (68%) and offering recycling services/facilities (65%) also rank highly within the industry.**

Business travel suppliers will increasingly be challenged on emissions reductions — both through energy efficiency gains (74%) and clean energy use (68%) — and waste management (72%), as these policies rank as the most important for travel buyers.

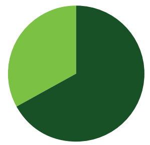
It should also be noted that **only a quarter (25%) of buyers view offsetting as a highly or very highly impactful activity.** This aligns with the outside view, as carbon offsets are also ranked as the least efficient tool to improve the business travel sector's environmental performance by external stakeholders. The results likely reflect the realization that compensating for emissions cannot be seen as a substitute for reducing value chain emissions in the business travel sector.

CHAPTER 5

The Value of Partnerships



90% of the industry says that GBTA should guide the sector in its sustainability journey



67% of travel buyers say that the business travel sector should commit to a common climate target

GUIDING THE INDUSTRY

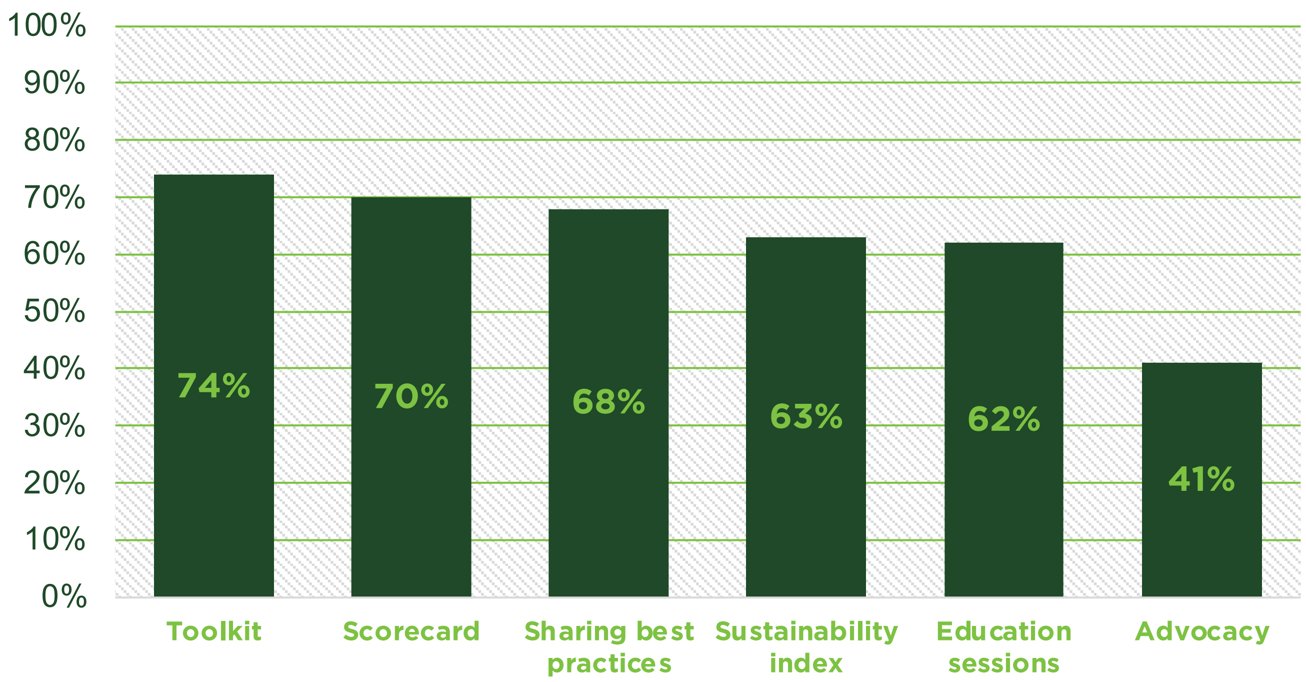
Looking at the current state of the industry, it is evident that a strong sense of urgency and willingness exists in the business travel sector to become more sustainable. **What seems to be missing are the tools and partnerships needed to leverage this momentum and align existing corporate practices with sustainability priorities** resulting in actionable sustainable business travel practices, such as those identified in Chapter 4.

To make this happen, 90% of business travel buyers and 88% of suppliers say that GBTA's role should be to guide the sector on a shared sustainability journey. The **push for GBTA to champion the journey is particularly strong in Europe and Latin America, where the figure rises to 94%** for both buyer and supplier respondents combined.

There is a strong recognition that **companies cannot tackle the sustainability challenge on their own.** Partnerships are required to support one another by sharing best practices and by ensuring that the full value chain commits to improving its environmental performance.

> "Bring about a common platform to provide information about sustainability."
>
> **SUPPLIER, INDIA**

What TOOLS AND ACTIVITIES do you wish to receive from GBTA?



> "Provide guidance, research, and advocacy for the members. Give members the means to start sustainability programs in their own companies."
>
> **BUYER, UNITED STATES**

To this end, the industry needs constant support for regular comparisons of vendors and developing their own sustainable business travel programs. Specifically, the top tools and activities that both business travel buyers and suppliers want from GBTA include a **sustainability toolkit to provide a step-by-step guide on incorporating sustainable practices (73%) and a global scorecard of harmonized metrics to scope the sustainability performance of suppliers (70%).** Perhaps unsurprisingly, the development of a supplier scorecard is the number one request for travel buyers (79%) specifically.

GBTA is already working to address these needs, having begun the work to develop an actionable and user-friendly sustainability toolkit as well as a common supplier scorecard template for its members for delivery in 2022. For those at the beginning of their journey, GBTA is also enhancing the sustainability content of its business travel education sessions. This is seen as a particularly important development, as **84% of the external policy stakeholders call for GBTA to increase awareness and educate the sector on sustainable practices.**

TRAVELING TOGETHER

In addition to practical support for its membership, the survey responses also **demonstrate an opportunity for GBTA to act as a champion of the sector's sustainability ambitions and progress to external audiences.** For example, around two-thirds of both the internal (63%) and external (64%) respondents think GBTA should establish an annual global sustainability index or report to showcase the latest sustainability trends in the business travel industry.

> "We are talking about new concepts, which forces the travel manager to make their travelers aware by providing reliable information and content."
>
> **BUYER, ARGENTINA**

> "The industry has to align and realize that even though they are competitors we need to make this change TOGETHER."
>
> **BUYER, DENMARK**

> "Sustainability will only ever work if the entire travel industry works toward common goals and outcomes."
>
> **SUPPLIER, SOUTH AFRICA**

Similarly, there is majority support from both groups for GBTA to engage in more in-depth research on the future of sustainable business travel.

Through such initiatives, GBTA can both provide its members with a benchmark on annual progress in the industry's sustainability journey and **demonstrate the joint impact of sustainability efforts undertaken by the sector to policy stakeholders and other organizations.**

Most notably, 67% of business travel buyers believe **the industry should collectively commit to a climate target**, such as reaching net-zero emissions by a common deadline. This view is also held by a majority of respondents across all regions, which further demonstrates the recognition of the sustainability journey as a common objective for the whole sector.

Establishing a collective climate target is also supported by the external stakeholders, 78% of whom say that the industry should make such a commitment.

Having kickstarted the industry's journey towards environmental sustainability, the milestone will be to **develop the necessary tools and principles to proactively shape what sustainable business travel means and position the sector at the forefront of climate action and environmental stewardship.**

ABOUT THE GLOBAL BUSINESS TRAVEL ASSOCIATION

The Global Business Travel Association (GBTA) is the world's largest business travel and meetings trade organization headquartered in the Washington, D.C. area with operations across four continents. GBTA's members manage more than $345 billion of global business travel and meetings expenditures annually. GBTA delivers world-class education, events, research, advocacy and media to a growing global network of more than 28,000 travel professionals and 125,000 active contacts. To learn more, visit https://www.gbta.org/.

This report and GBTA's Sustainability Program are supported by the association's Founding Partners in Sustainability. For more information about GBTA's sustainability initiatives, visit www.gbta.org/sustainability or email sustainability@gbta.org.

ABOUT GRAYLING

Grayling is a leading integrated public affairs and public relations consultancy, providing sustainability communications. With 30 offices around the globe and over 100 consultants, it has the reach, influence, and infrastructure of a global agency, with the creativity, connections, and cultural know-how of a boutique. Combining our breadth of expertise across public relations and public affairs, our proprietary technologies, and a creative and inclusive culture, we develop and deliver award-winning communications solutions that create advantage for our clients.

The Brussels office which acts as a hub for Europe was established in 1989 and is today a leading public and corporate affairs firm with 25 consultants providing expertise in key EU policies, trade association management, events, and digital advocacy.

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