

### SUSTAINABLE TRAVEL STUDY

Consumer Attitudes, Values, and Motivations in Making Conscientious Choices

RESEARCH | 22





#### **Overview**

As travel restrictions continue to ease and travelers hit the road and the skies once again, they will increasingly seek ways to have more meaningful and conscientious travel experiences, from searching for and booking more sustainable options to looking for ways to improve their impact on the destinations and communities they visit.

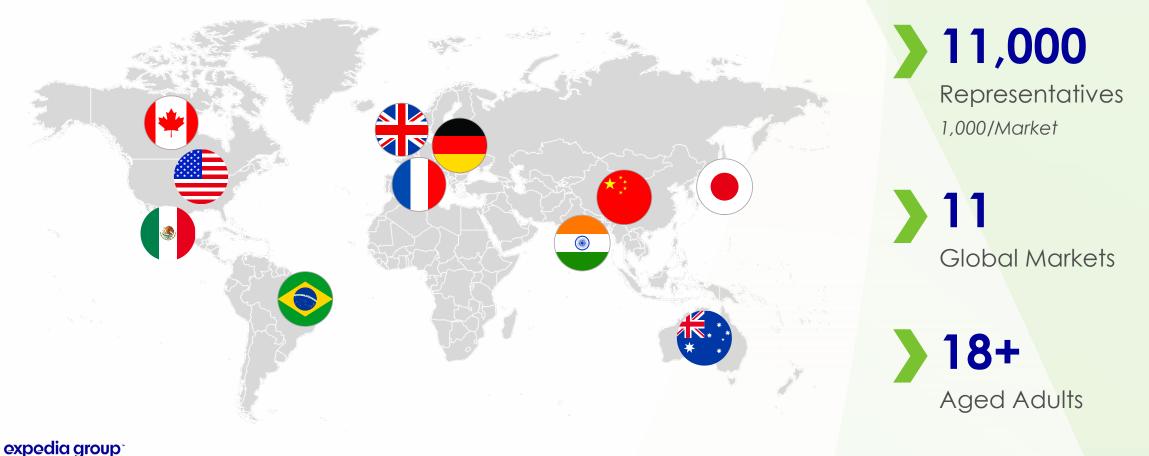
We conducted a global study to understand what consumers consider sustainable travel, what tradeoffs they are willing to make, and where and how they are looking for information to make more mindful choices.

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#### Methodology

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Expedia Group Media Solutions conducted a study with Wakefield Research of consumers around the world to understand past and future attitudes, behaviors, and values around sustainability in travel.



Field Work: February 11 - March 6, 2022

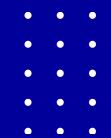
### Sustainable

### Travel Landscape

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# What do consumers see as part of sustainable travel?







#### 90% of consumers look

#### for sustainable options

### when traveling

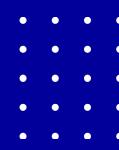


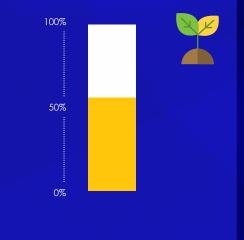
Q15. How often, if ever, do you look for sustainable options when traveling? These could be to sustain the local environment, economy, or culture.



### Low environmental impact options

have highest recall among consumers





56%

noted options for having low environmental impact 51%

0%

100%

50%

noted options that are owned by/work with local cultures or communities

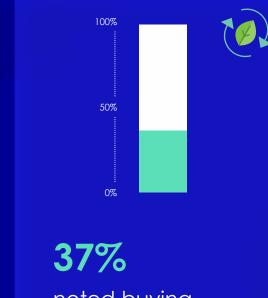


100%

50%

0%

noted options that identify as supporting local businesses



noted buying carbon offsets or carbon offsetting

expedia group<sup>\*</sup> media solutions While traveling during the past two years

#### 3 in 5 consumers have

#### opted for more

#### environmentally

friendly transportation

or lodging





Q3. In the past two years, which of the following, if any, have you done while traveling, for either leisure or business? (NET RESPONSE)



Consumers want **authentic commitment** to sustainability, not just lip service

### 7 in 10 consumers

#### have avoided a travel

### destination or

#### transportation option

due to skepticism that the **commitment to** sustainable practices was real

Q19. Have you ever, even once, not chosen a travel destination or transportation option because you did not feel it was actually committed to sustainable practices?



#### 65% of consumers

#### would like to opt for

#### environmentally

friendly transportation

#### or lodging on their



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## Consumers are already trying to make meaningful decisions when traveling

•	•	•	
•	•	•	
•	•	•	
•	•	•	

49%	Bought from local stores and restaurants, rather than chains
46%	Visited local cultural or historical sites
43%	Used more environmentally friendly transportation options
42%	Bought from local cultures, communities, or minority groups
41%	Traveled to smaller, lesser-known areas or destinations
40%	Stayed in lodging that's actively lessening its environmental impact
37%	Paid more for <b>sustainable options</b> (i.e., carbon offsets)
34%	Used providers who declare commitment to sustainable practices
34%	Volunteered time to help local community organizations at the destination



#### And more want to make **meaningful decisions when traveling in the future**

Past decisions				Future decisions
	<b>49</b> %	Would buy from local stores and restaurants, rather than chains	50%	
	46%	Would visit local cultural or historical sites	<b>49%</b>	
	43%	Would use more environmentally friendly transportation options	47%	
	<b>42</b> %	Would buy from local cultures, communities, or minority groups	45%	
	41%	Would travel to smaller, lesser-known areas or destinations	44%	
	40%	Would stay in lodging that's actively lessening its environmental impact	45%	
	37%	Would pay more for sustainable options (i.e., carbon offsets)	<b>39</b> %	
	34%	Would use providers who declare commitment to sustainable practices	40%	
	34%	Would volunteer time at local community organizations at the destination	38%	



Q4. Which of the following, if any, would you want to do the next time you travel, for either leisure or business?

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# The Price of **Sustainable** Travel

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#### 74% of consumers

#### said it costs too much

to be more sustainable

#### when traveling



Q7. How strongly do you agree or disagree with the following statement? It costs too much for someone like me to be more sustainable when I travel.



#### But <u>half</u> of consumers

### would be willing to

#### pay more

for transportation, activities, and lodging if the option was more sustainable



Q12. Which of the following, if any, would you be willing to pay a little more for in your travels if it meant the option was more sustainable?

#### On average,

#### consumers are willing

#### to pay 38% more

to make their travels

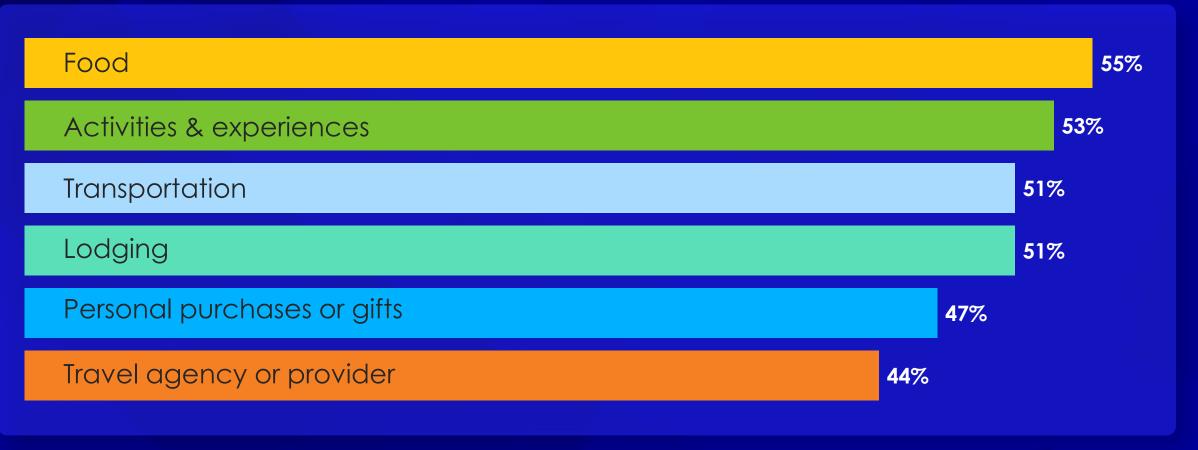
more sustainable



Q13. How much more would you be willing to pay for your travels to ensure they were more sustainable?



## Consumers are willing to **spend more on sustainable travel options** . .



Q12. Which of the following, if any, would you be willing to pay a little more for in your travels if it meant the option was more sustainable?



#### 74% of consumers

would choose a

destination, lodging,

or transportation

### option

that is **committed to supporting the local community and culture**, even if it was

more expensive



Q22. If a travel destination, accommodation, or transportation option was more committed to supporting the local community and culture than other options, would you choose that option even if it was more expensive?

#### Nearly 70% of consumers

#### are willing to sacrifice

#### convenience to be a

#### more sustainable

traveler

Save Our Planet

Please hang your towels to dry an use them another day, or leave yo towels elsewhere, and we will be happy to replace them.



Q14. Aside from cost, which of the following, if any, would you be willing to sacrifice if it meant you were being a more sustainable traveler?



100%

50%

0%

#### Consumers are willing to make some sacrifices to be a sustainable traveler



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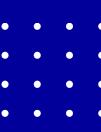
Q14. Aside from cost, which of the following, if any, would you be willing to sacrifice if it meant you were being a more sustainable traveler?

## Challenges & Opportunities in Sustainable rave

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#### Consumers want sustainable options in various destination types







Q17. If you were choosing to travel more sustainably today, which of the following types of location would you most want to see sustainable options for?



## Consumers want sustainable transportation options

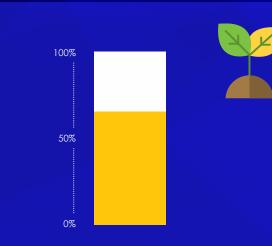




Q18. If you were choosing to travel more sustainably today, which of the following types of transportation for getting to the location would you most want to see sustainable options for?

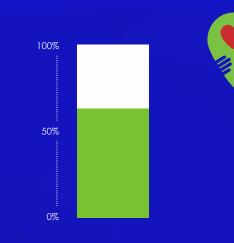


#### When it comes to sustainable travel, **consumers are most interested in options with low environmental impact**



66%

Options with low environmental impact



64%

Options that support local cultures and communities 62%

50%

Options that support local economies

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#### 7 in 10 consumers

#### feel overwhelmed by

#### starting the process of

#### being a more

#### sustainable traveler







To help them make **informed decisions** 

2/3 of consumers

want to see more

sustainability info

from lodging &

transportation

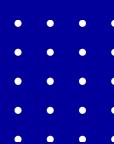
providers

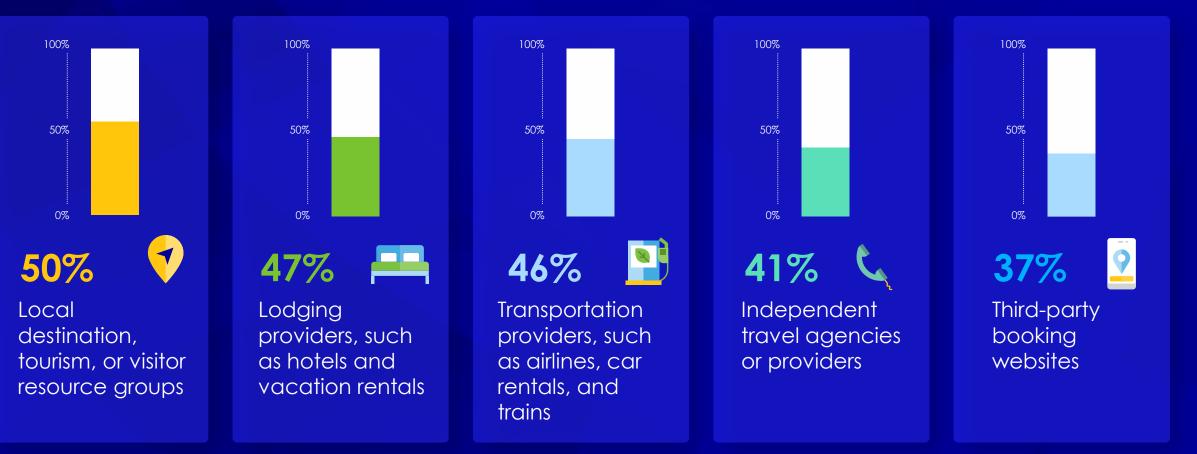


Q8. From which of the following places, if any, would you like to see more information on how to be a more sustainable traveler?

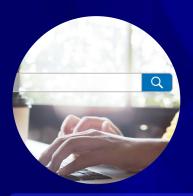


#### Consumers are seeking sustainable travel information from trusted travel resources and providers



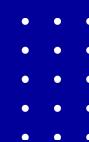


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#### Types of sustainable travel information

consumers want to see during the trip planning process



Recommendations for locally-owned businesses and restaurants at or near a destination	45%
Transportation options that have lower environmental impact	45%
Information on how to best engage with local cultures and communities at or near a destination	43%
Lodging or accommodations that have lower environmental impact	42%
Recommendations for destinations that support indigenous cultures and heritages	42%
Walkable or bikeable destination recommendations   4	1%
Eco-friendly activity recommendations 4	1%
Recommendations for destinations that are not over-visited 39%	
How to pack more sustainably 37%	
Info on volunteering with or supporting local organizations at a destination 34%	



#### Listings or info pages

#### on travel sites

#### is the preferred format

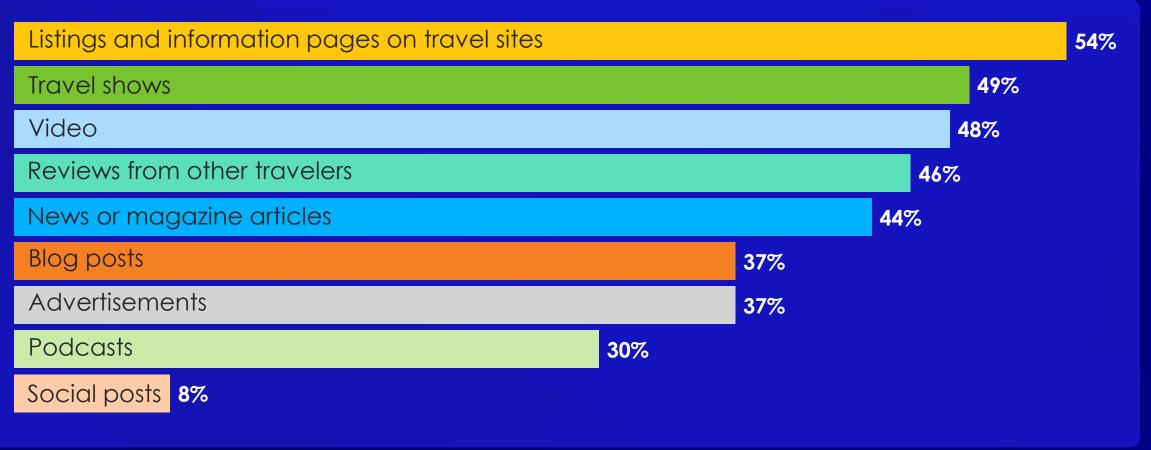
for viewing sustainable travel information during the trip planning process







## Preferred formats for viewing sustainable travel information



### Key Takeaways



#### Clarity

Sustainable travel information can be overwhelming and confusing. Make it easy to understand, leverage visual formats, and show clear impact.



#### **Authenticity**

Consumers want to know (and see) that travel brands are committed to sustainability, not just checking a box. Back up messaging with proof points and data.



#### Value

Consumers are willing to pay more for sustainable travel options. Illustrate the value and positive impact of making more conscientious choices.



# >> Thank You

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