

Virtuoso Impact Report
SUSTAINABLE TRAVEL
2024 HIGHLIGHTS

Virtuoso Impact Report

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VIRTUOSO IMPACT REPORT SUSTAINABLE TRAVEL 2024: PARTNER HIGHLIGHTS

2024 Partner Sustainability Study

- Second annual Virtuoso Partner sustainability study
- To capture the incredible work and efforts of our partners, to elevate this impact, celebrate collective success and recognize individual impact
- Over doubled the number of responses from 2023 (215), so we now have data on 482 companies
- Done in alignment with the United Nations' 17 Sustainable Development Goals (SDGs)
- Data processed and analyzed in collaboration with the African Leadership University's School of Wildlife Conservation

PARTNER REPRESENTATION & GLOBAL EFFORTS

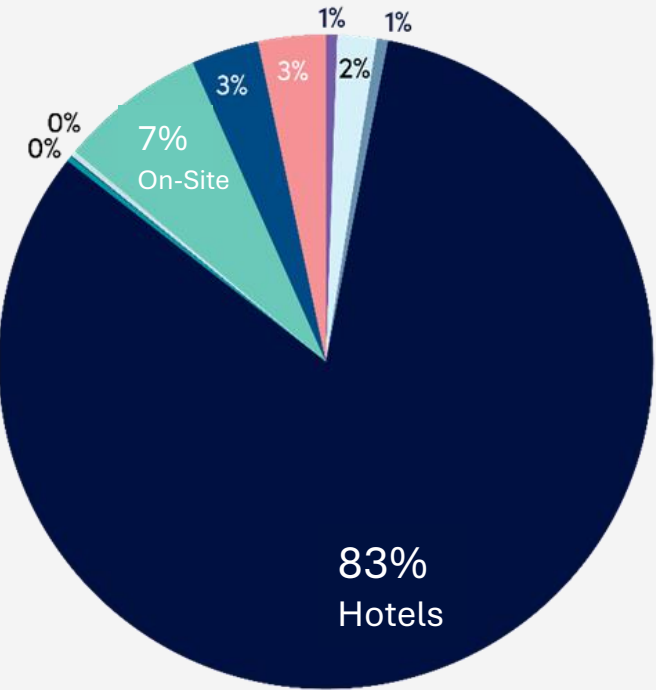
Partner Representation



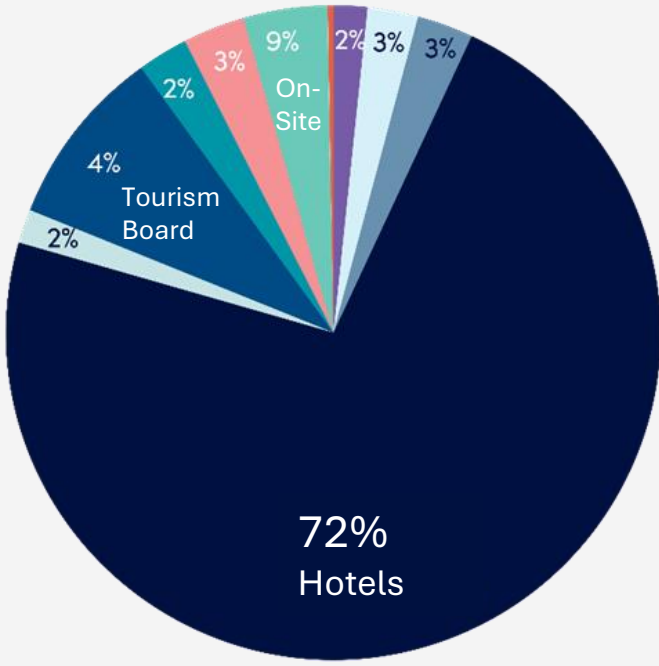
482 PARTNERS FROM
OVER 70 COUNTRIES
REPRESENTED

Increased global
representation by 16%

Partner Representation



Virtuoso Partner Study
Representation
(by partner type)



Virtuoso Network
Representation
(by partner type)

- Airline
- Cruise Line
- Hotel Chain
- Hotel or Resort
- Hotel Representative
- On-site
- Service Provider
- Tour Operator
- Tourism Board
- Rail Carrier
- Space Travel

Partner responses n = 482
Total partners n = 2530
July 2024

Aligned with UN Sustainable Development Goals

Funneled into our three core pillars of sustainability



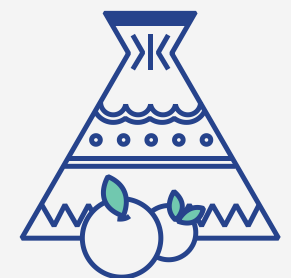
PEOPLE



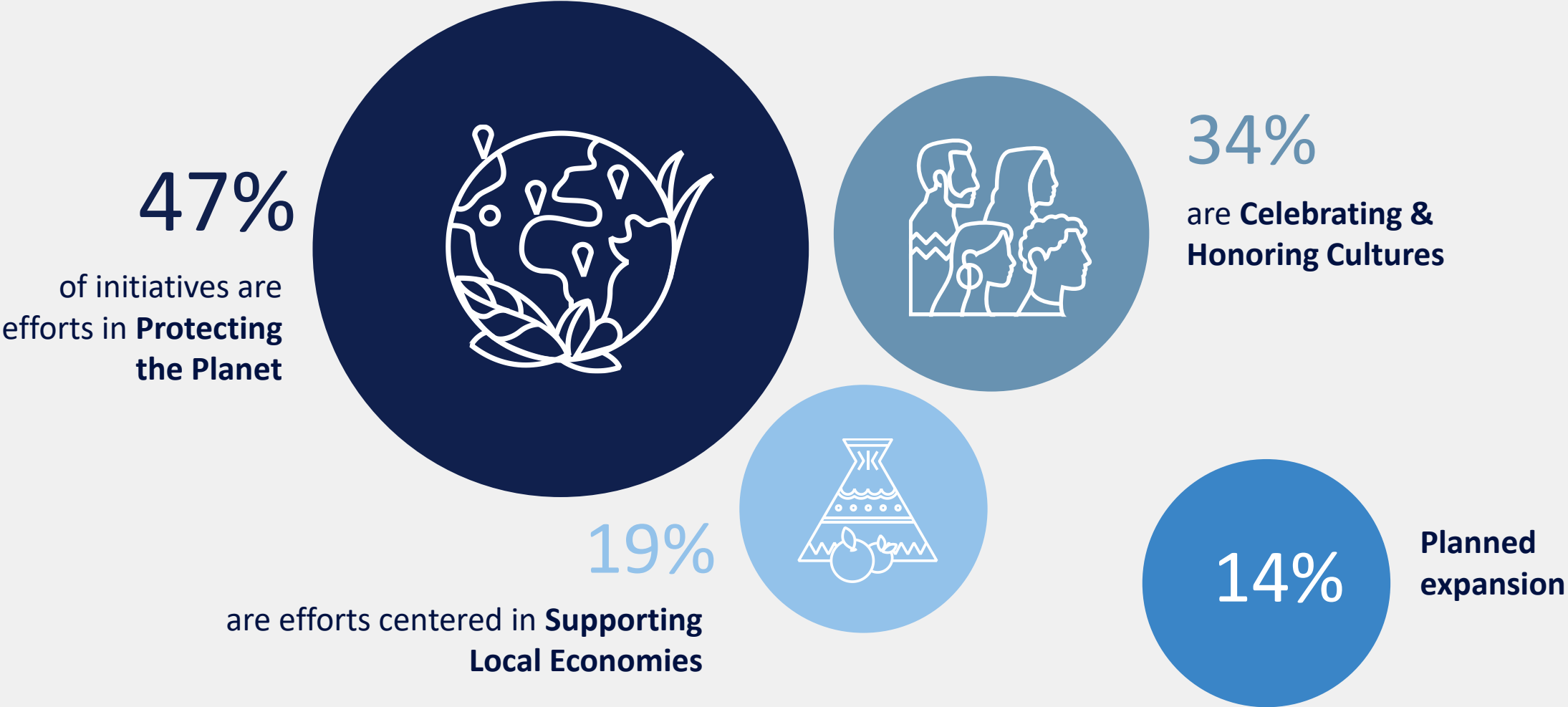
PLANET



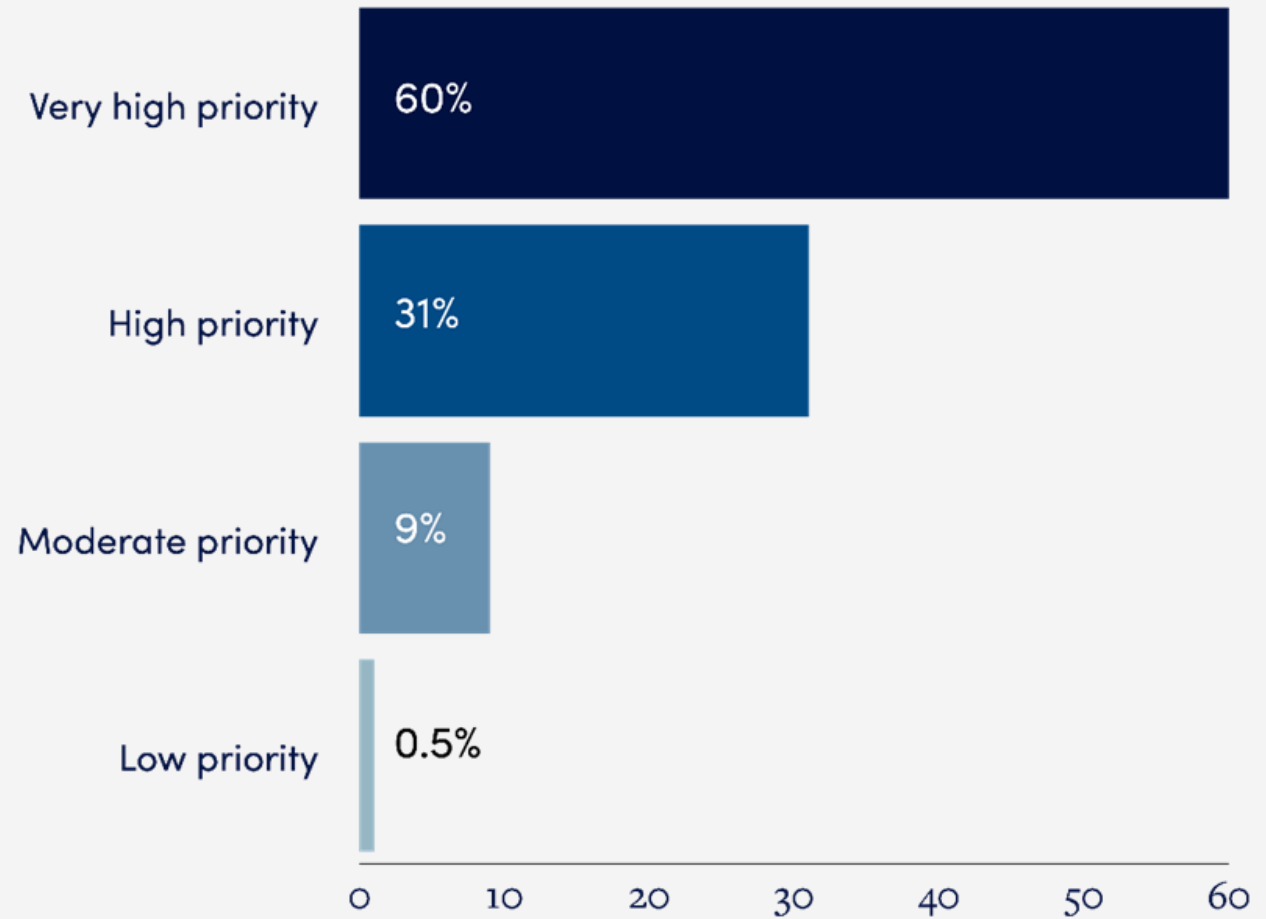
ECONOMY



Virtuoso Partners have over **7,000 initiatives** currently in place

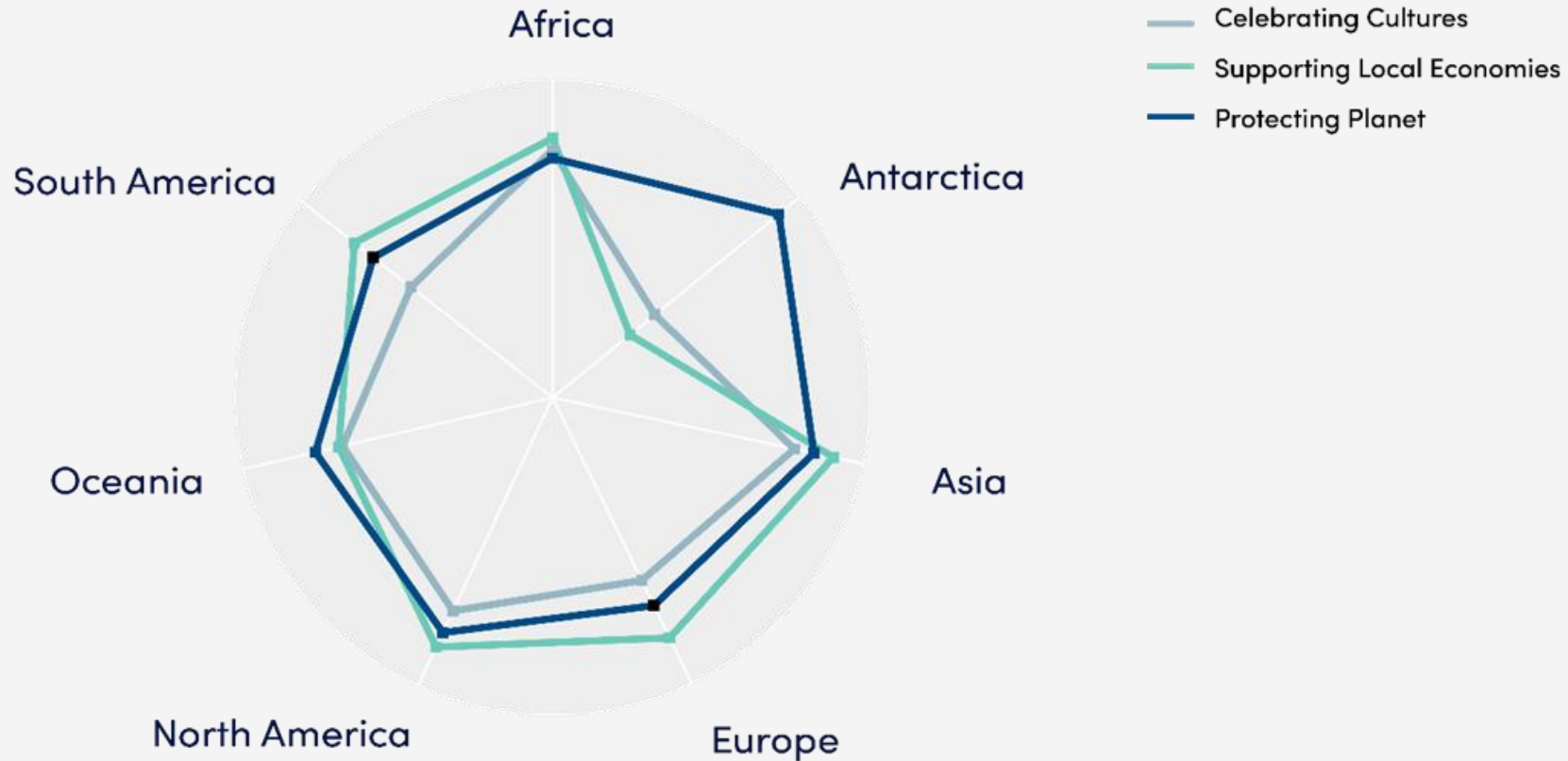


How would you rate the level of priority your company places on sustainability initiatives?

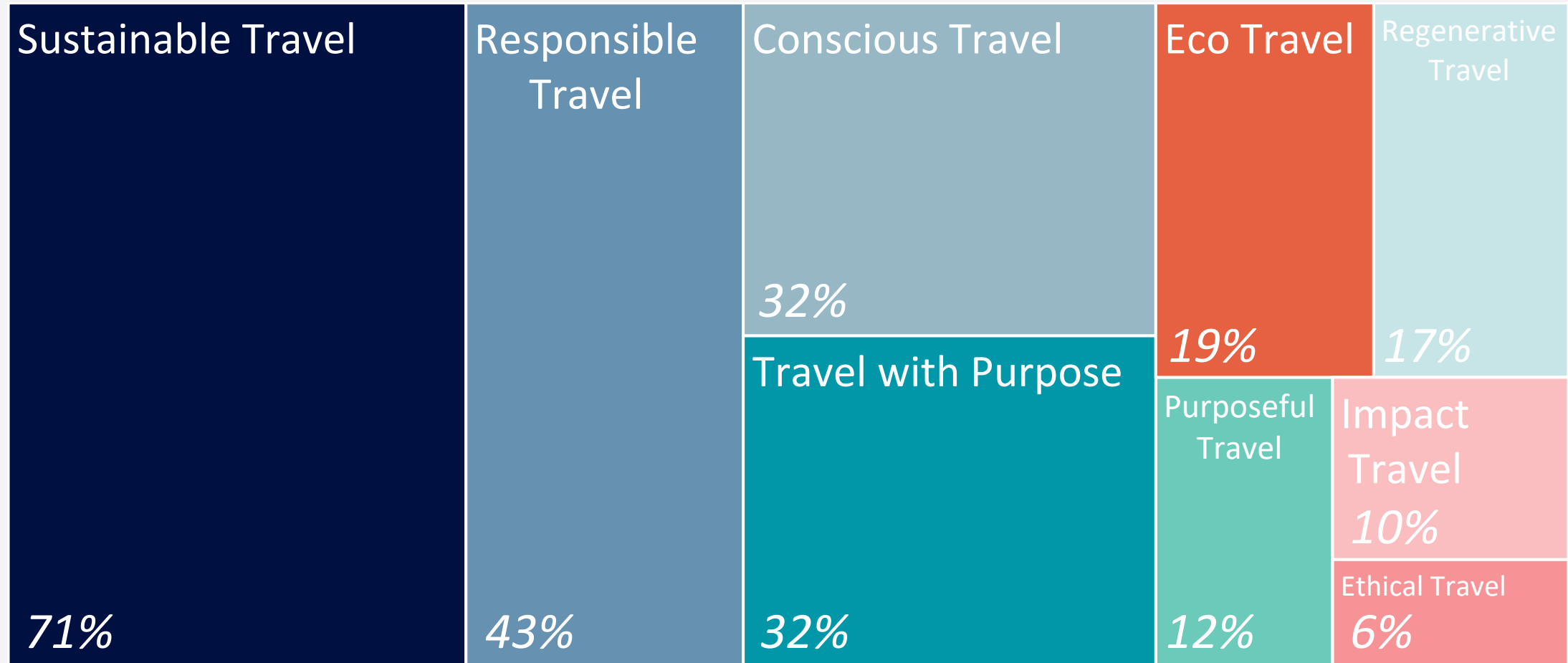


Global Efforts in Place

By Pillar

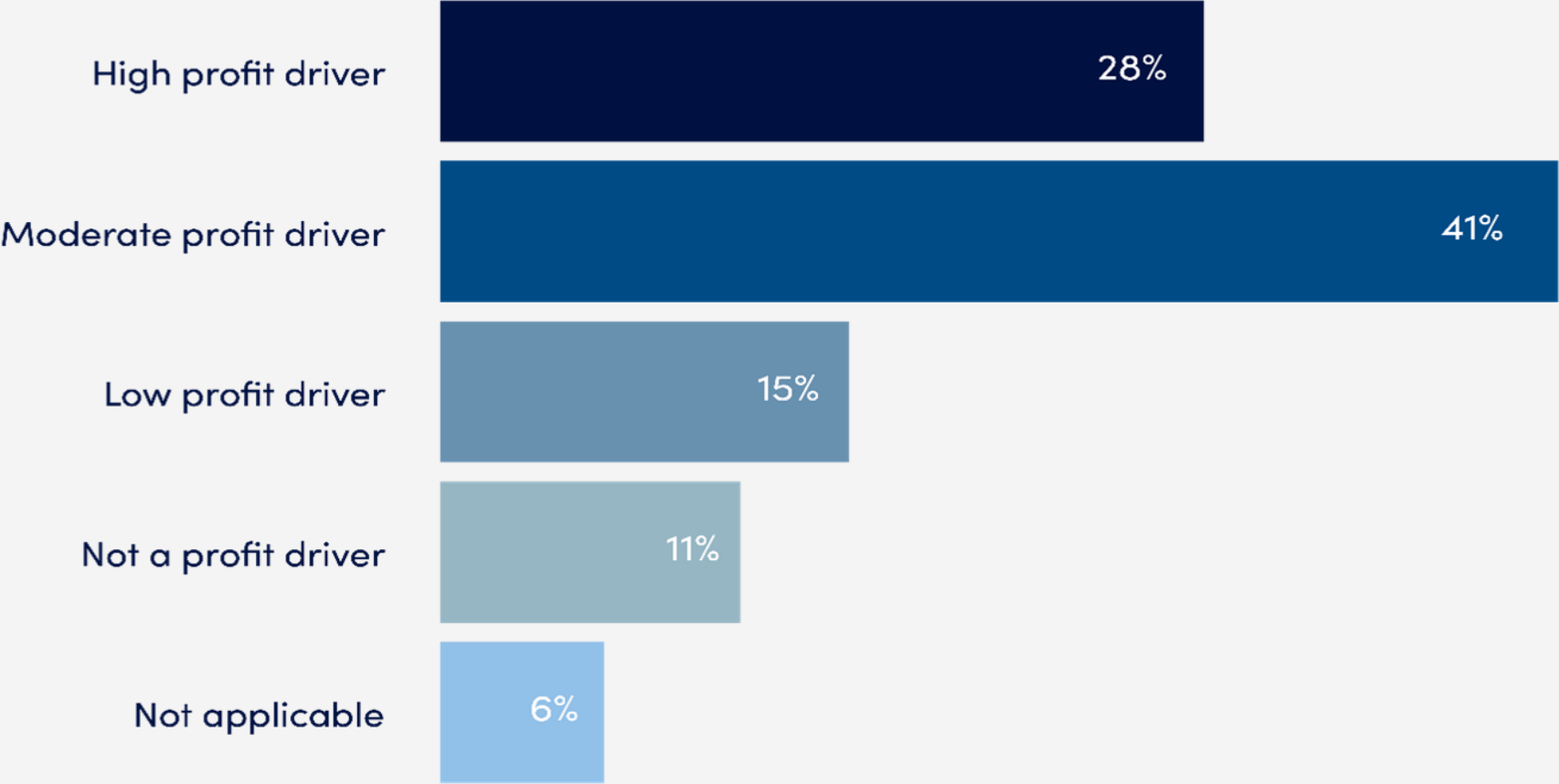


What terms do you use when talking about sustainable travel?



- Sustainability as a Profit Driver
- Use of AI
- Future Plans*

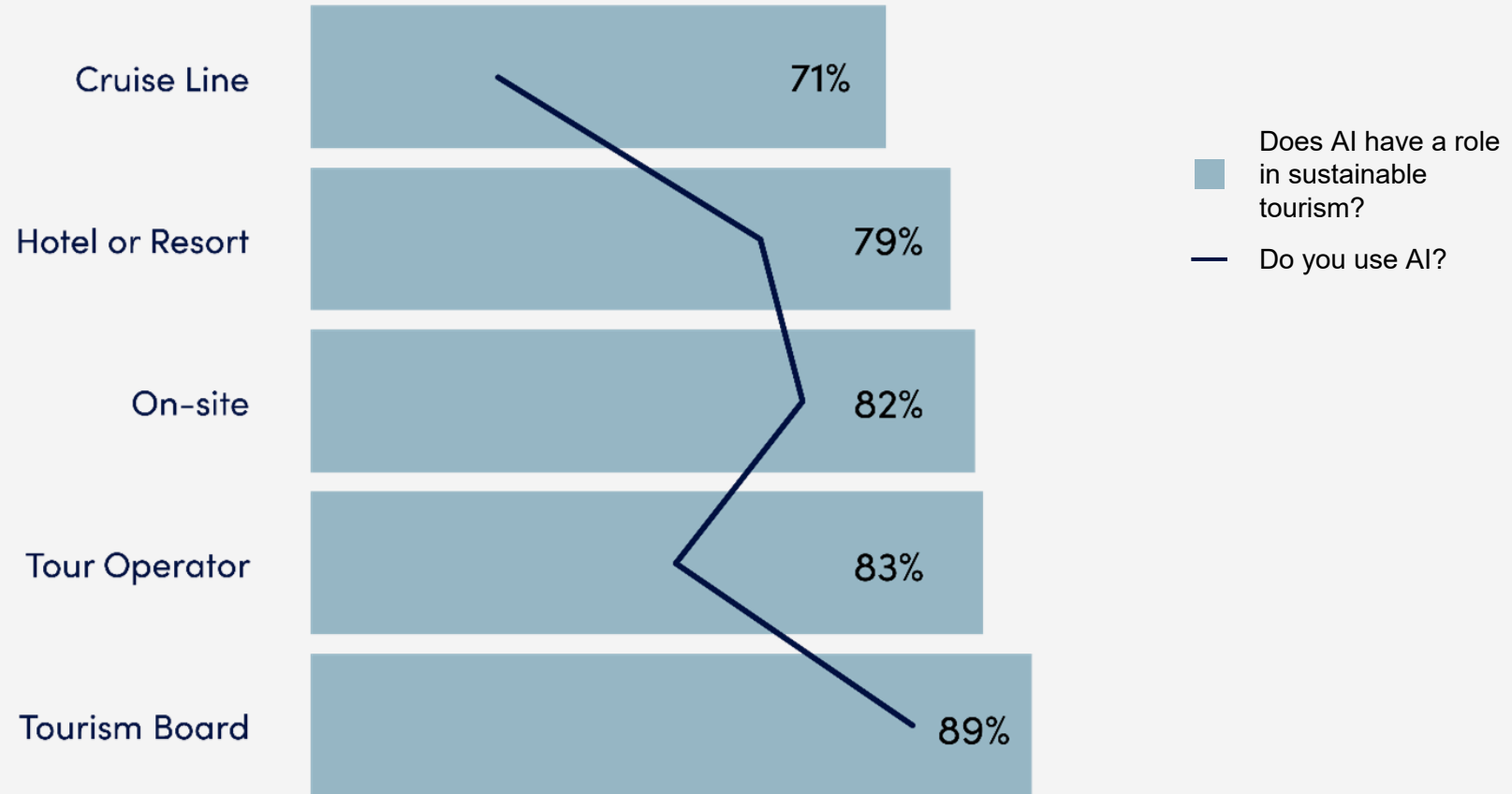
Sustainability as a Profit Driver



Profit Drivers By Effort

Sustainability activity	Category	Count	Profit drivers
Waste Management (Profit)	Protecting Planet	202	41.91%
Local Businesses (Profit)	Supporting Local Economies	165	34.23%
Renewable/Sustainable Energy (Profit)	Protecting Planet	156	32.37%
Carbon Emissions (Profit)	Protecting Planet	147	30.50%
Water and Sanitation (Profit)	Protecting Planet	143	29.67%
Sustainable Agriculture (Profit)	Protecting Planet	138	28.63%
Sustainable Consumption and Production (Profit)	Protecting Planet	138	28.63%
Local Products/Handicrafts (Profit)	Supporting Local Economies	136	28.22%
Wildlife (Profit)	Protecting Planet	122	25.31%
Environmental Education Guests (Profit)	Protecting Planet	109	22.61%
Local Culture Education (Profit)	Celebrating Cultures	91	18.88%
Environmental Education Staff (Profit)	Protecting Planet	87	18.05%
Sustainable infrastructure (Profit)	Supporting Local Economies	83	17.22%
Gender Equality (Profit)	Celebrating Cultures	82	17.01%
Land Conservation (Profit)	Protecting Planet	80	16.60%
Water and Marine Resources (Profit)	Protecting Planet	80	16.60%
Training and Apprenticeship (Profit)	Celebrating Cultures	80	16.60%
Education (Profit)	Supporting Local Economies	66	13.69%
Indigenous Cultures (Profit)	Celebrating Cultures	66	13.69%
Cultural Restoration (Profit)	Celebrating Cultures	59	12.24%
Equality (Profit)	Celebrating Cultures	58	12.03%
Children and Youth (Profit)	Celebrating Cultures	56	11.62%
Food security (Profit)	Celebrating Cultures	43	8.92%
Peaceful Societies (Profit)	Celebrating Cultures	43	8.92%

Role of AI in Sustainable Tourism



Planned Sustainability Efforts

By partner type

Partner-type	Number	Protecting Planet	Supporting Local Economies	Celebrating Cultures
Airline	3	9.09%	0.00%	3.70%
Cruise Line	10	3.64%	0.00%	2.22%
Hotel Chain	3	9.09%	0.00%	11.11%
Hotel or Resort	399	9.43%	6.64%	7.32%
Hotel Representative	1	9.09%	0.00%	0.00%
On-site	34	8.02%	2.94%	6.21%
Service Provider	1	18.18%	50.00%	0.00%
Tour Operator	16	4.55%	1.56%	6.94%
Tourism Board	15	9.70%	10.00%	8.15%
Total	482	9.07%	6.17%	7.12%

Heat map key
Low → High



CELEBRATING CULTURE

Celebrating Cultures

Leading Efforts



GENDER EQUALITY

82% in place
6% planned



EQUALITY

66% in place
5% planned



TRAINING AND
APPRENTICESHIP

64% in place
9% planned



CHILDREN AND
YOUTH

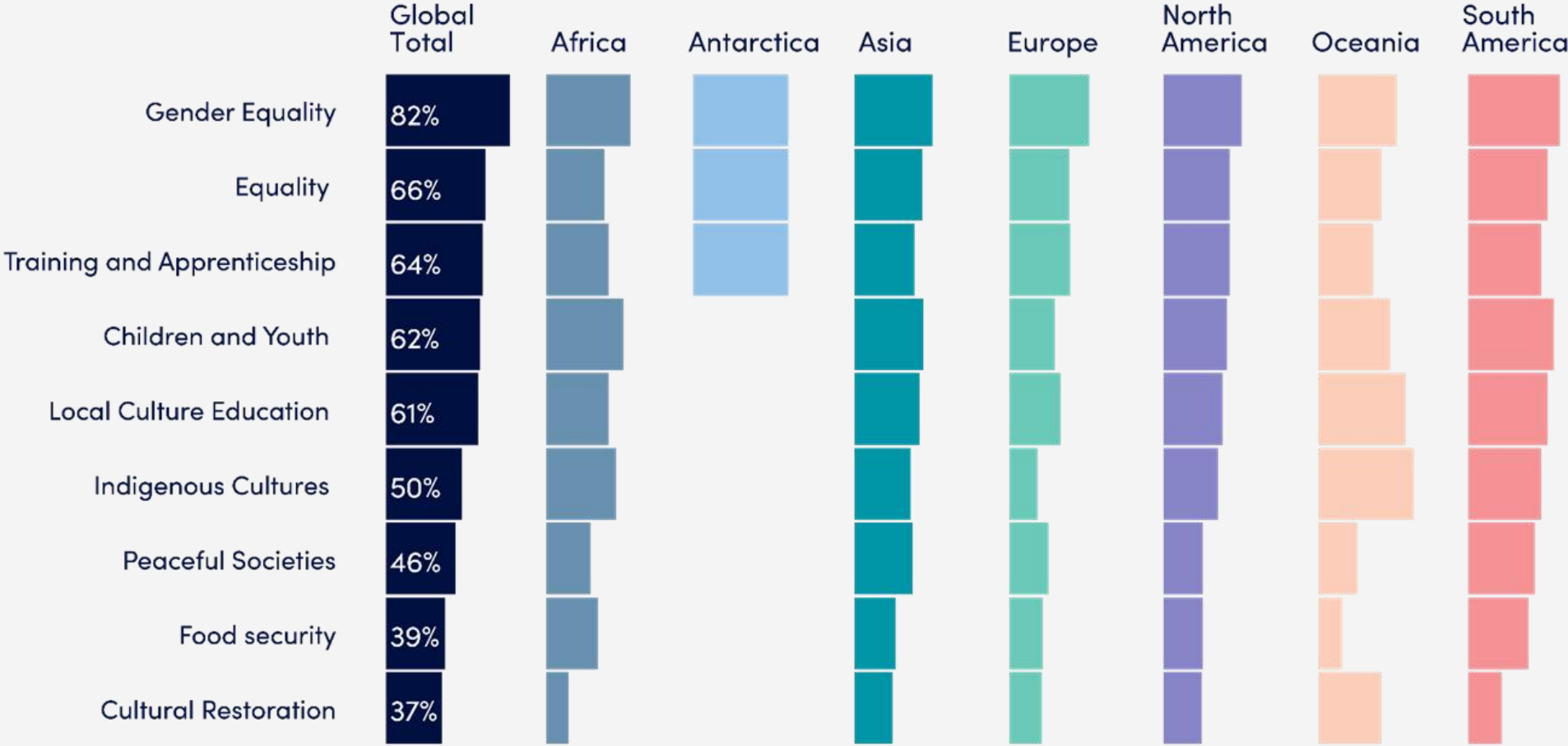
62% in place
9% planned



LOCAL CULTURE
EDUCATION

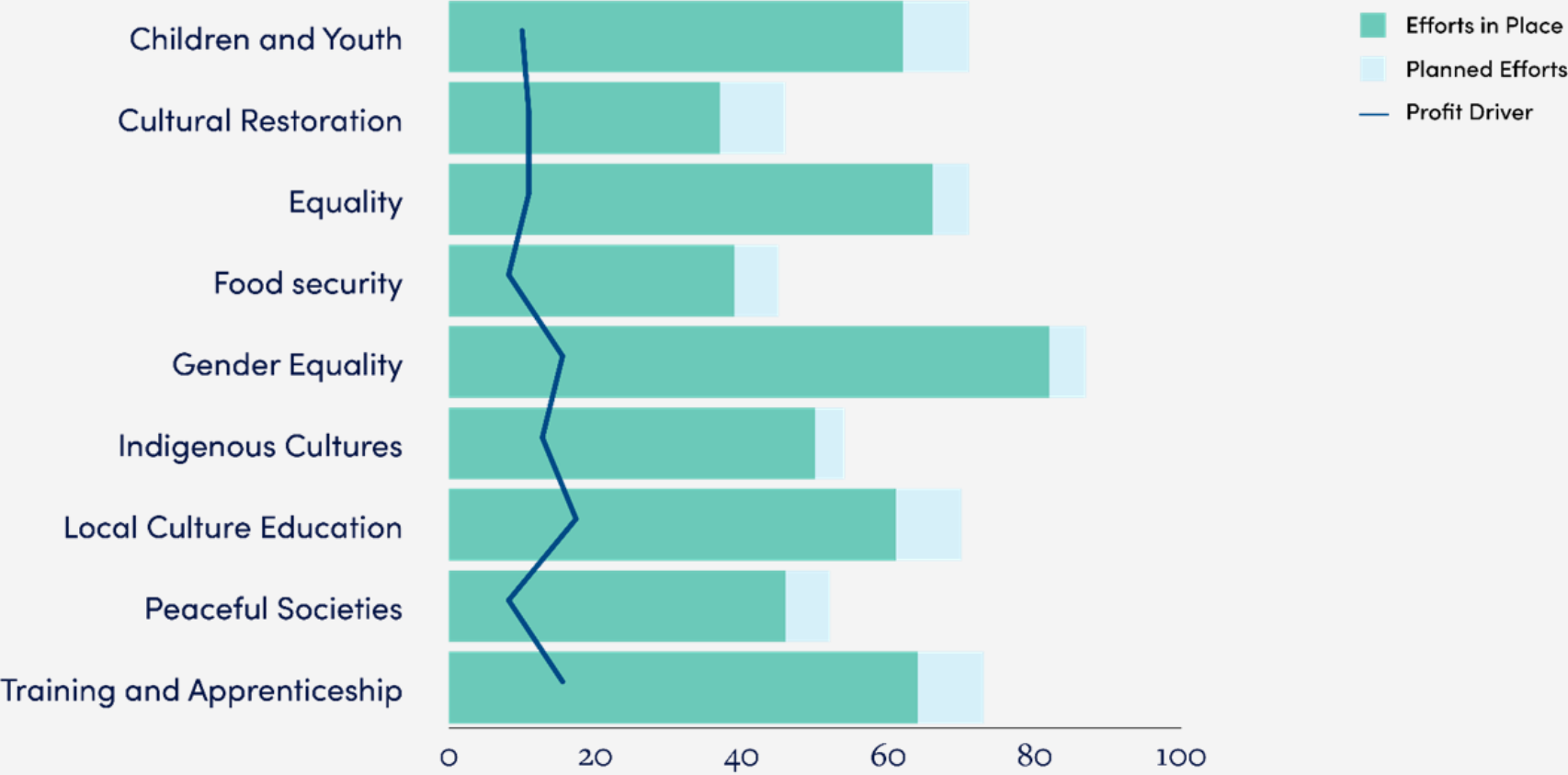
61% in place
9% planned

Celebrating Cultures



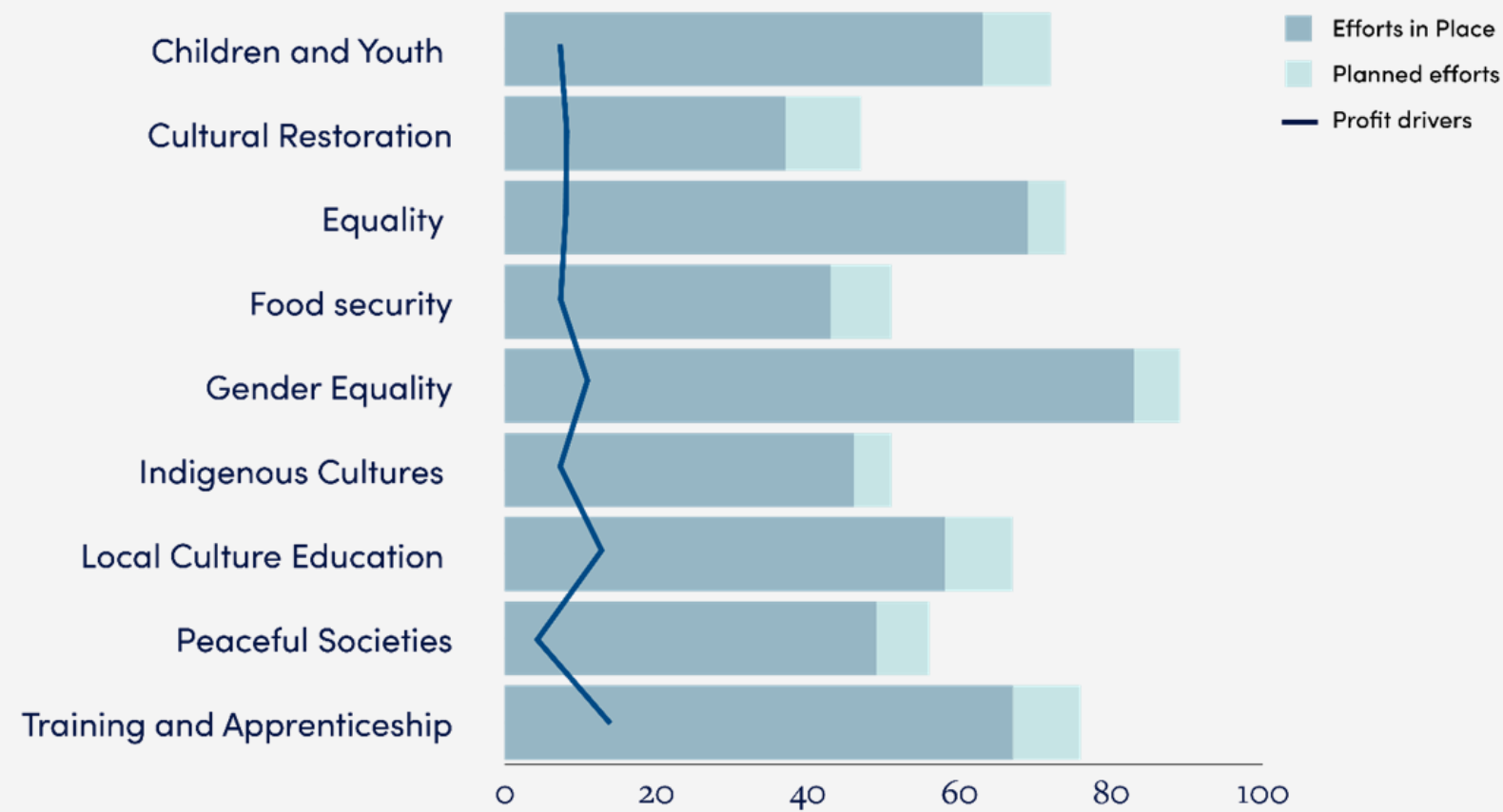
Celebrating Culture

Efforts in place, planned efforts, level of profit driver



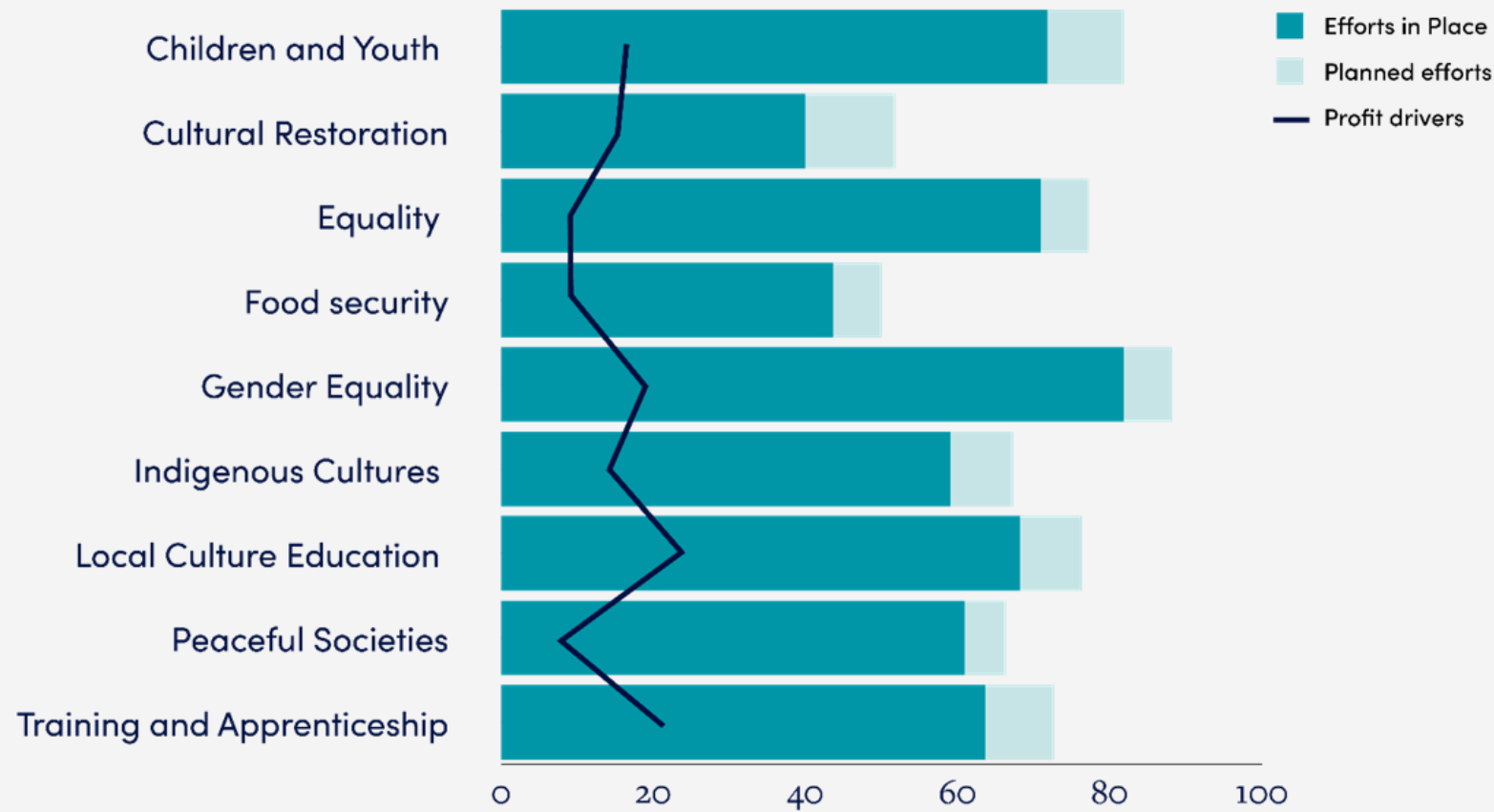
Hotels & Resorts

Efforts in Place: Celebrating Culture



Asia

Efforts in Place: Celebrating Cultures



SUPPORTING LOCAL ECONOMIES

Local Economy Spend

\$82
million

In charitable donations
facilitated by 258
Virtuoso Partners

Average
\$460

Per visitor is spent or
donated with local
artisans, businesses,
NGO's, programs,
individuals, or groups

22%

Of revenue goes back
into the local economy



Over 385,000 local jobs created

Total Number of
Employees: 709,657

55%

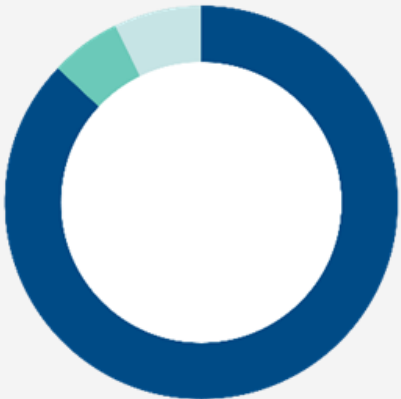
Representing people from the
local community

By 482 (19%) Virtuoso Partners in
60+ countries



Supporting Local Economies

Leading Efforts



LOCAL
BUSINESSES

87% in place
6% planned



LOCAL PRODUCTS /
HANDICRAFTS

84% in place
5% planned



EDUCATION

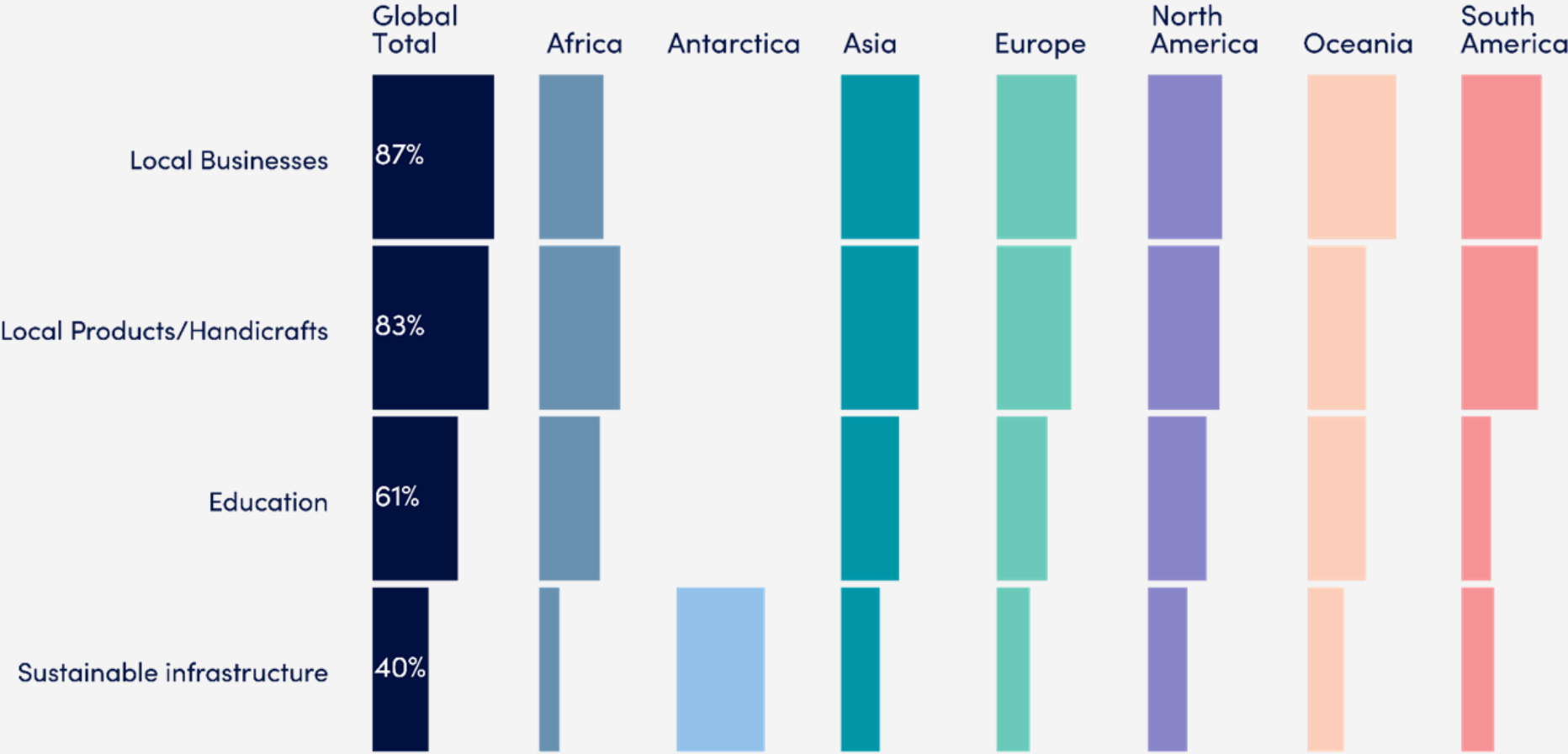
61% in place
6% planned



SUSTAINABLE
INFRASTRUCTURE

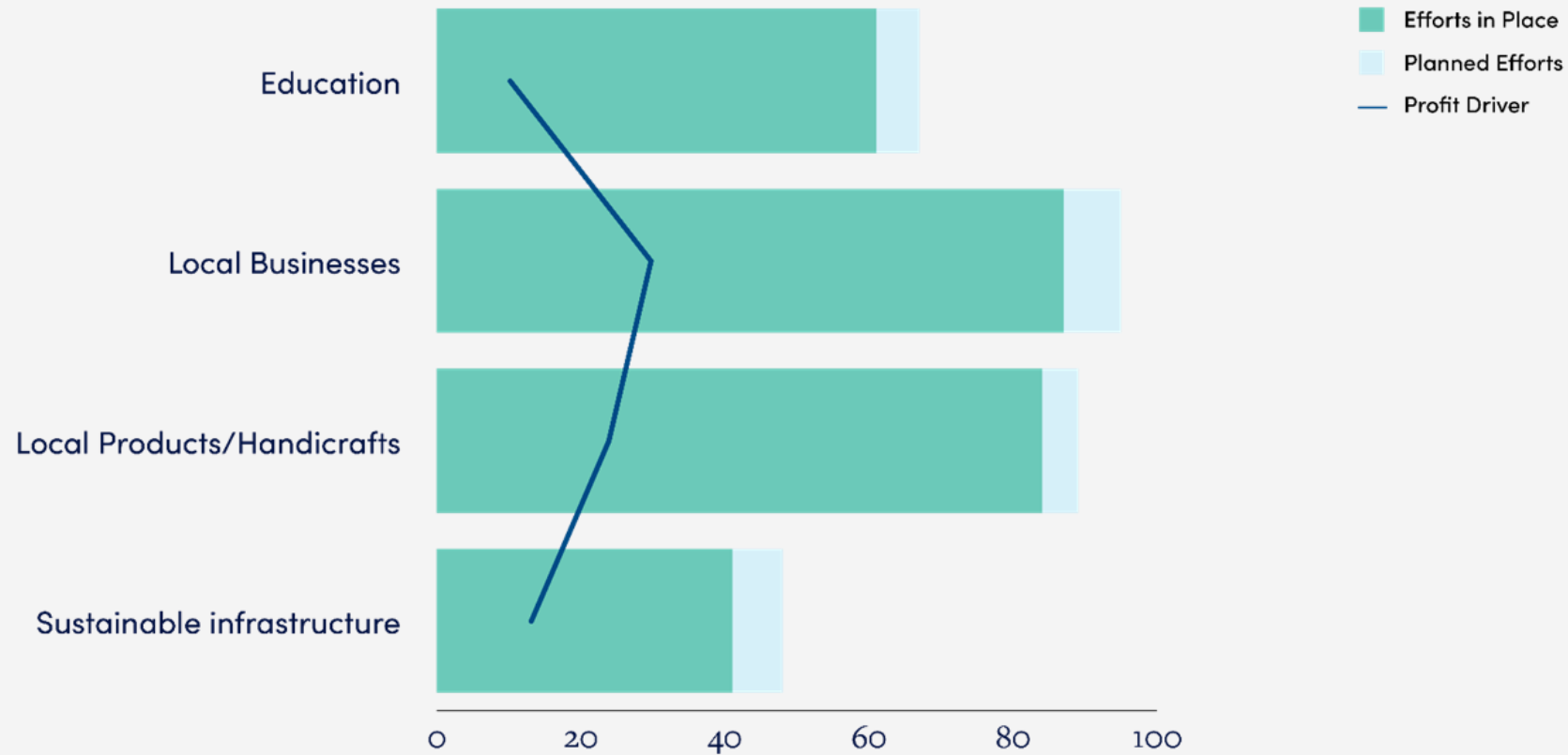
40% in place
7% planned

Supporting Local Economies



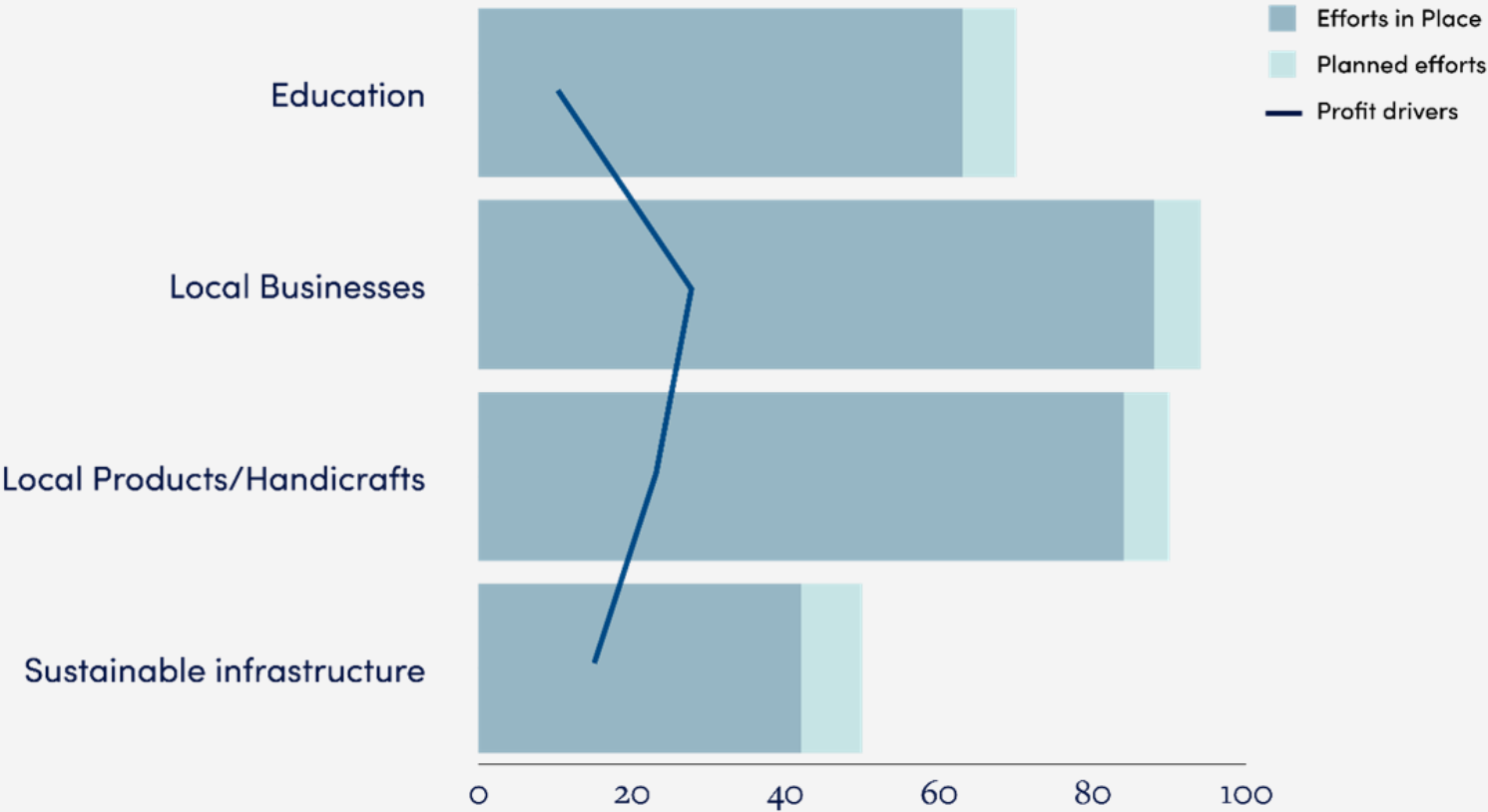
Supporting Local Economies

Efforts in place, planned efforts, level of profit driver



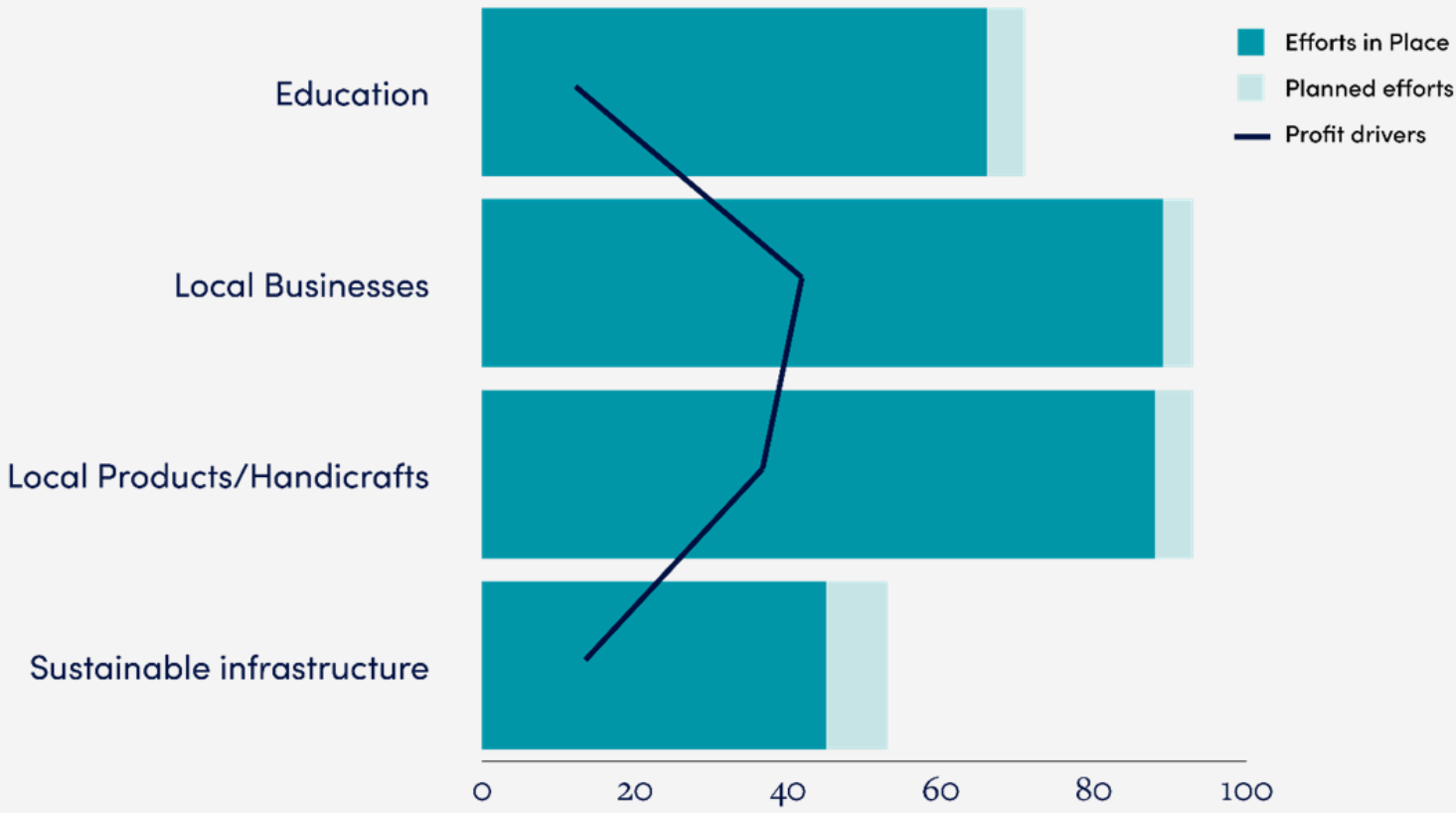
Hotels & Resorts

Efforts in Place: Supporting Local Economies



Asia

Efforts in Place: Supporting Local Economies



PROTECTING THE PLANET

Land Conservation

Over *167,000 Sq KM / 42 M Acres* in active land conservation efforts

AMERICAS
10k Sq Km.
2.5 M Acres

AFRICA
156,000 Sq Km
38.5 M Acres

EUROPE
101 Sq Km
25k Acres

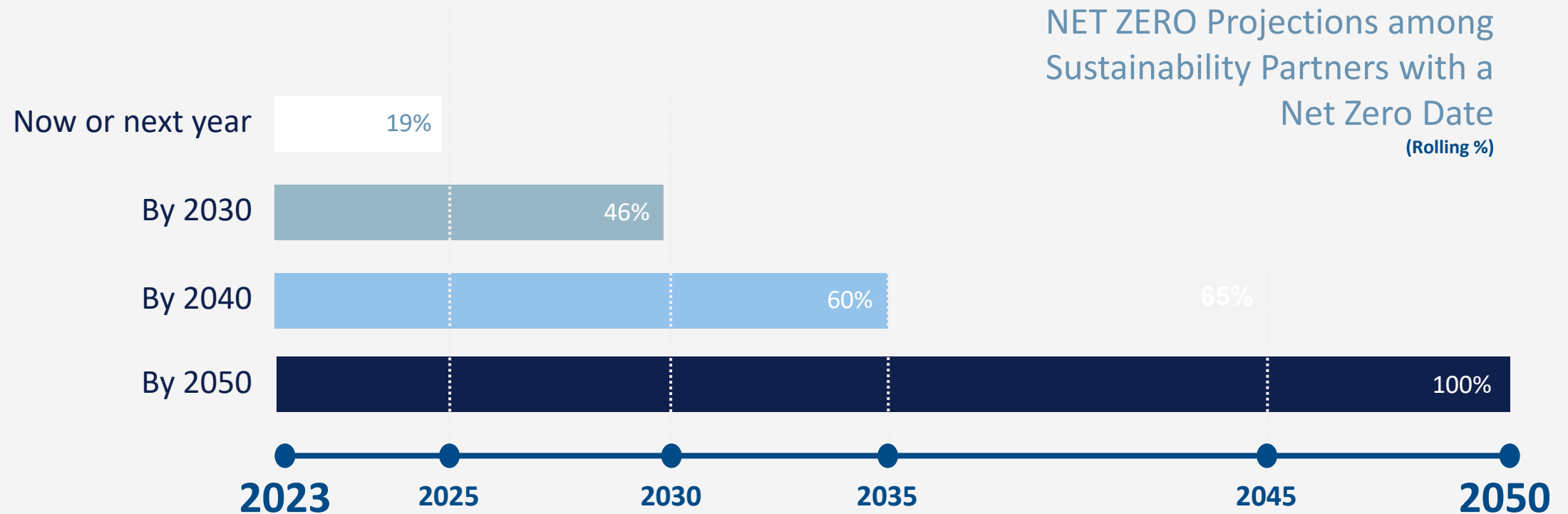
**AUS/
OCEANIA**
11.5 Sq Km.
2.8k Acres

ASIA
450 Sq Km
111k Acres

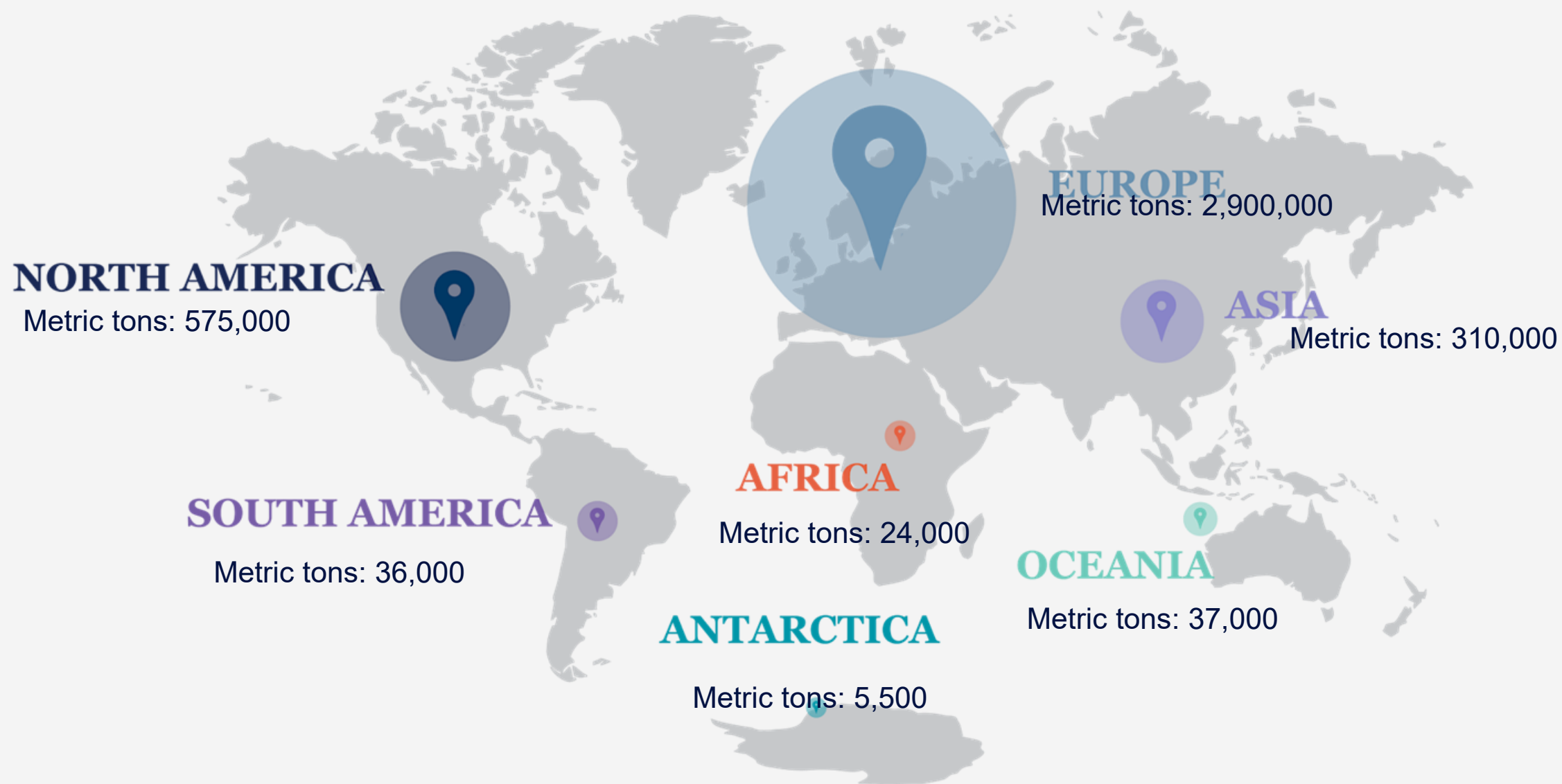
*an area as large as Florida



95 Partners plan to be Net Zero by 2050



Carbon Offsets



Protecting the Planet

Leading Efforts



WASTE
MANAGEMENT

91% in place
9% planned



ENVIRONMENTAL
EDUCATION FOR
STAFF

83% in place
7% planned



ENVIRONMENTAL
EDUCATION FOR
GUESTS

78% in place
10% planned



WATER AND
SANITATION

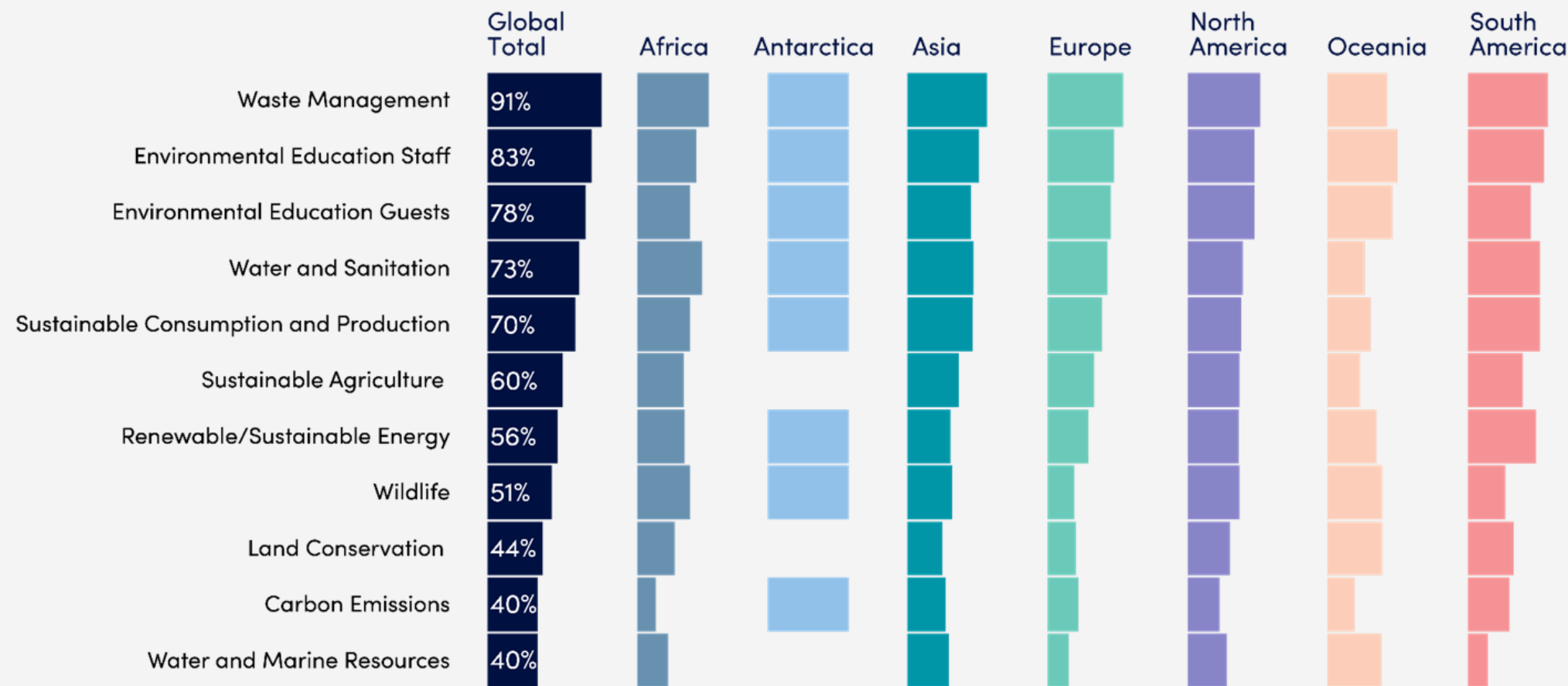
73% in place
9% planned



SUSTAINABLE
CONSUMPTION
AND PRODUCTION

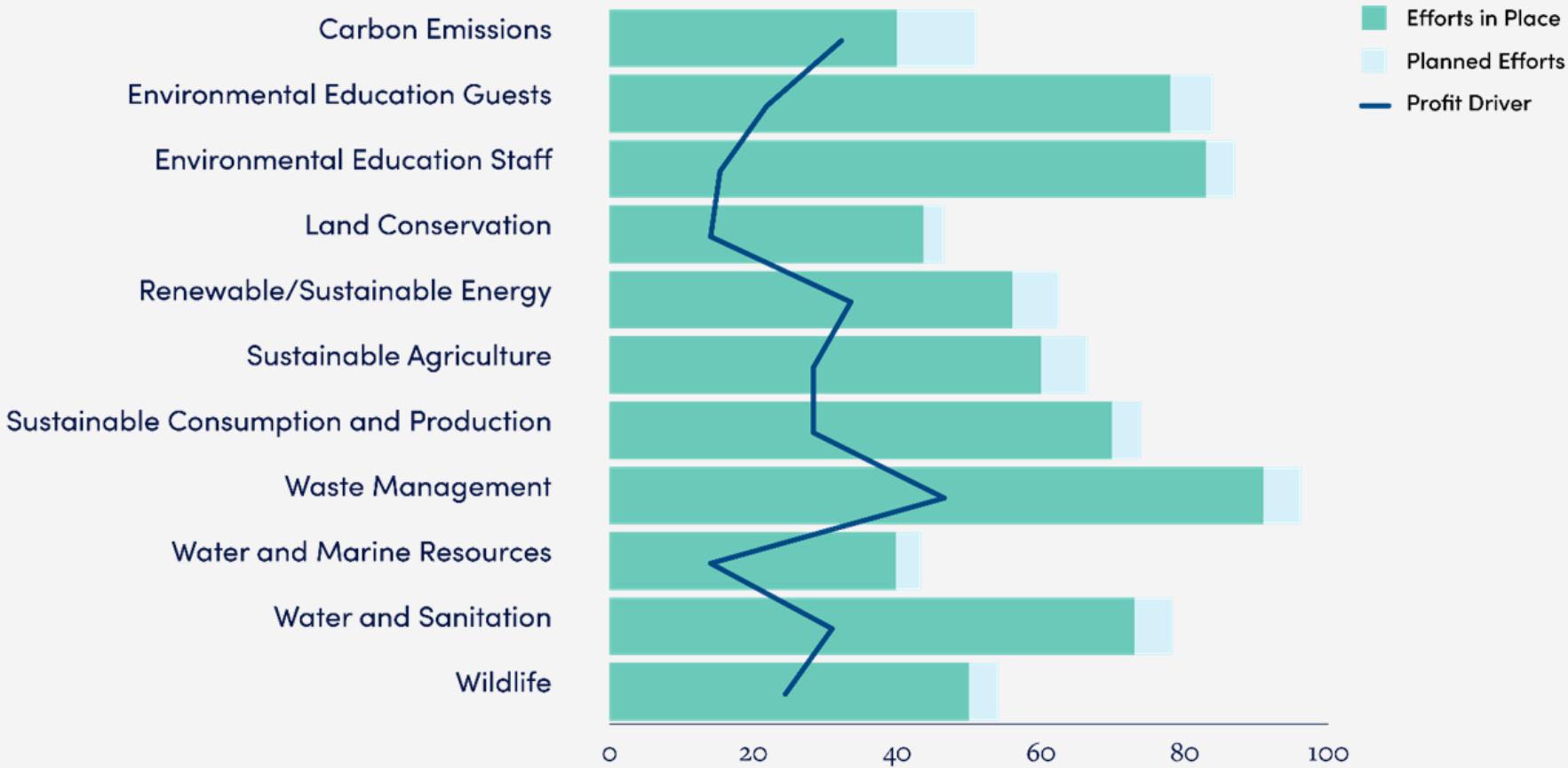
70% in place
7% planned

Protecting the Planet



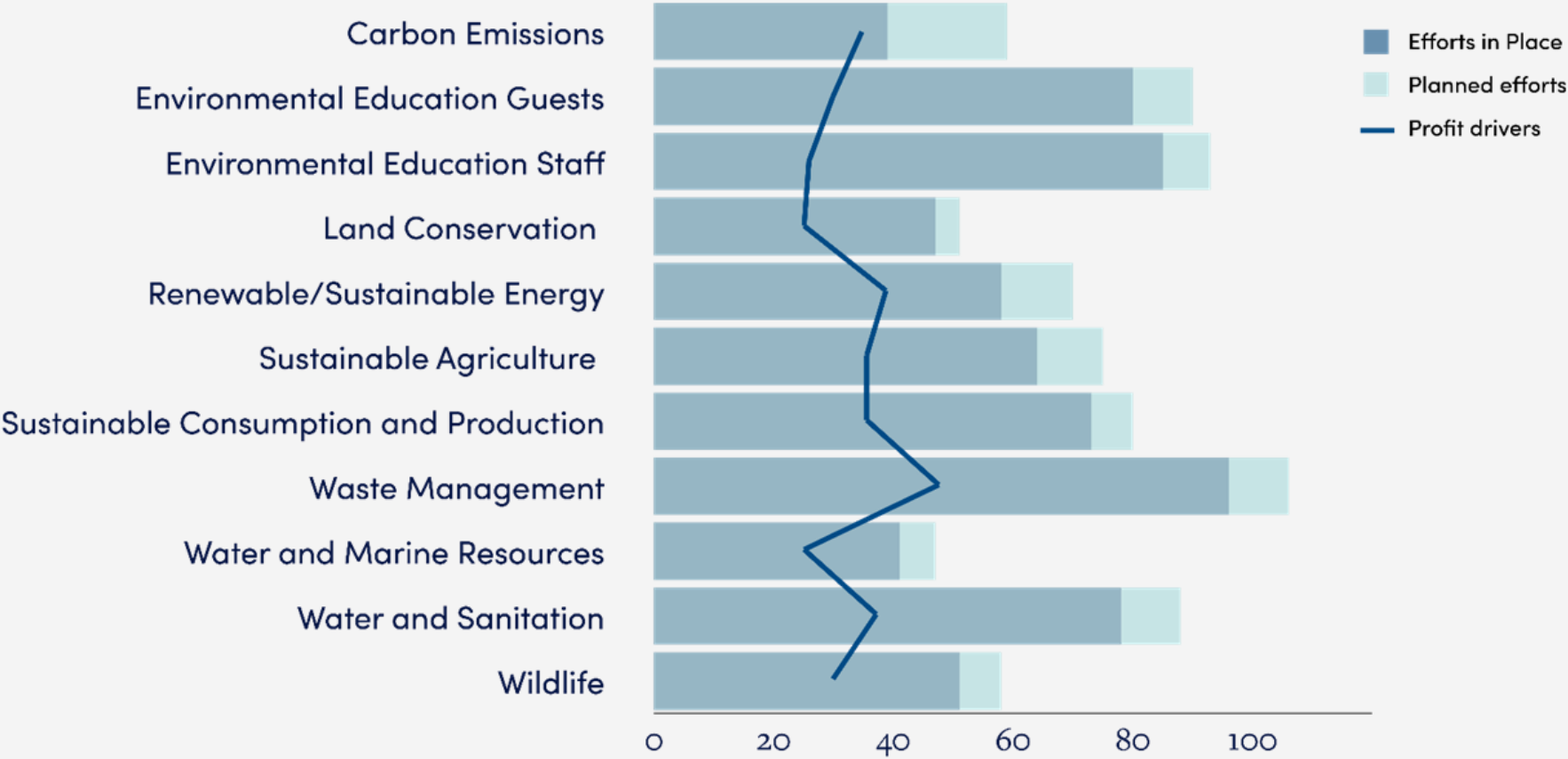
Protecting the Planet

Efforts in place, planned efforts, level of profit driver



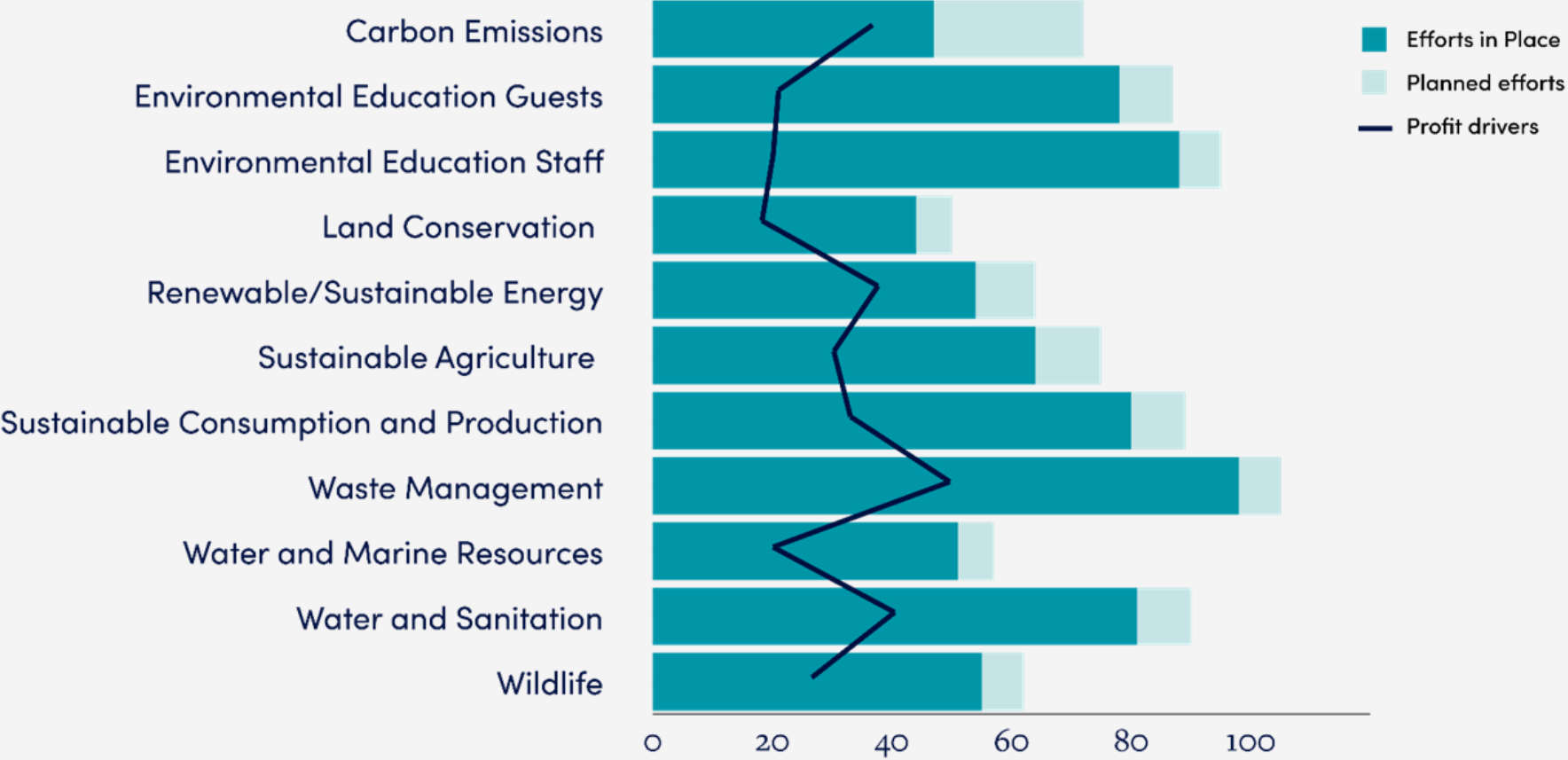
Hotels & Resorts

Efforts in Place: Protecting the Planet



Asia

Efforts in Place: Protecting the Planet

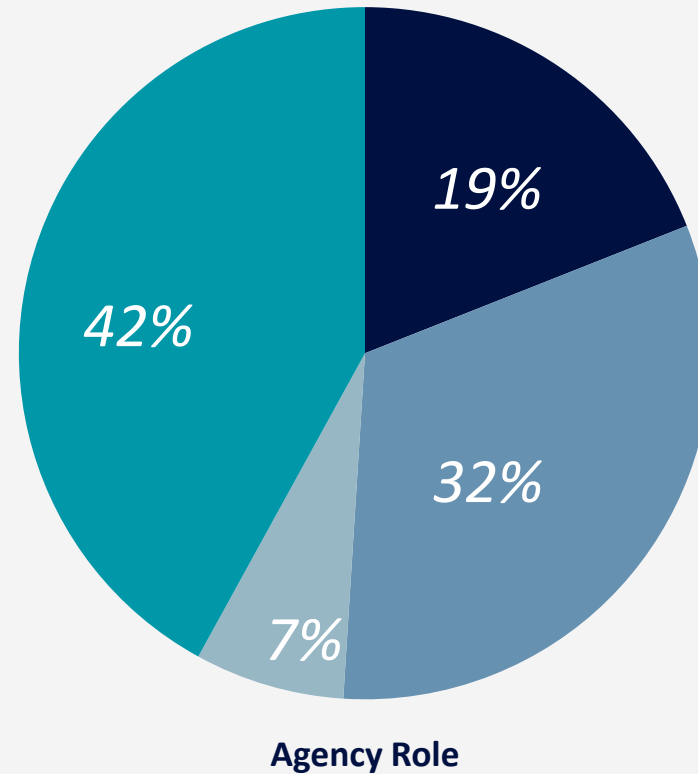


VIRTUOSO IMPACT REPORT SUSTAINABLE TRAVEL 2024: MEMBER HIGHLIGHTS

Introduction to Study

- First annual Virtuoso Member Sustainability Study
- To gather valuable insights on sustainability from Virtuoso's global network of travel agencies and advisors, this study aims to understand the role of travel advisors in promoting sustainable tourism. It explores the perceptions of sustainability among luxury travel advisors and travelers, and identifies opportunities for Virtuoso and its Preferred Partners to enhance support for travel advisors on their sustainable travel journeys.
- Data processed and analyzed by the Virtuoso Sustainability Team

Member Representation

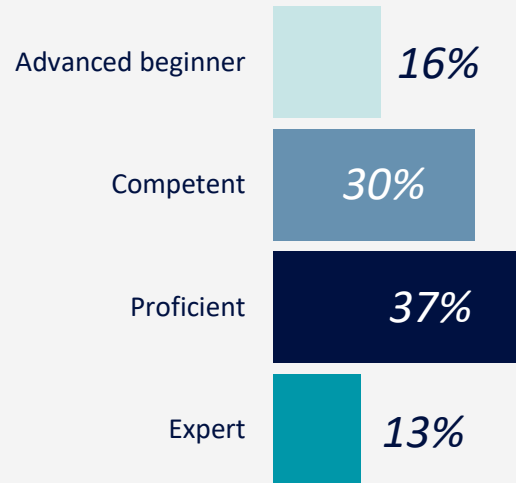


- Advisor
- Agency owner/manager
- Agency staff (non-advisor)
- Independent contractor

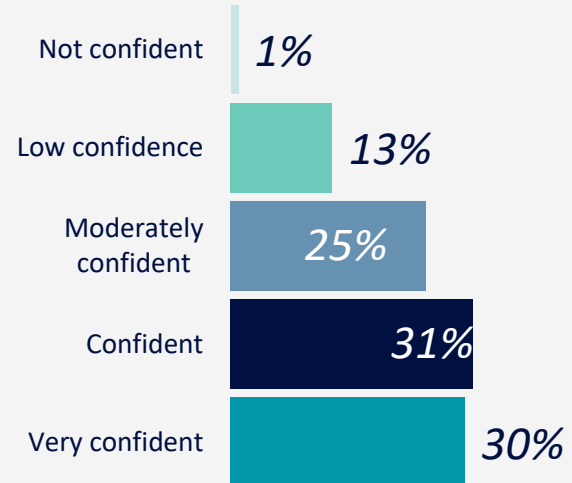
SUSTAINABLE TRAVEL KNOWLEDGE & BUSINESS FOCUS

Knowledge & Confidence

Your level of sustainability knowledge

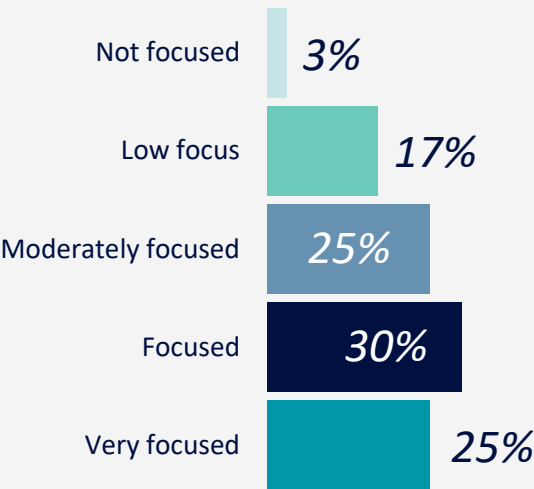


Your level of confidence in terms of talking about sustainability with partners and clients

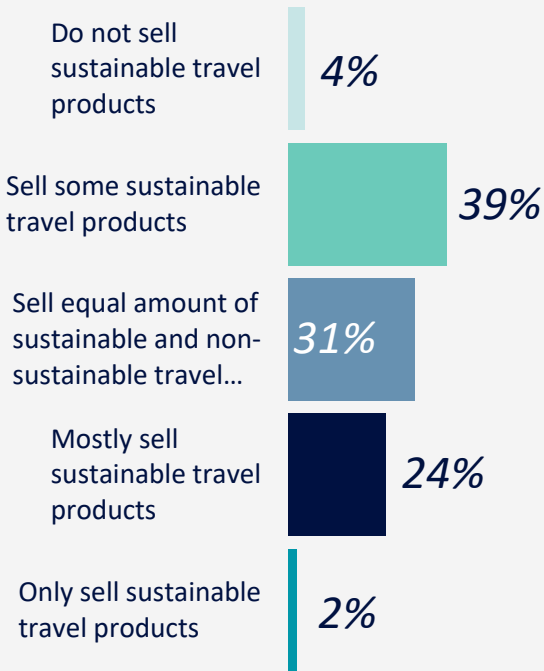


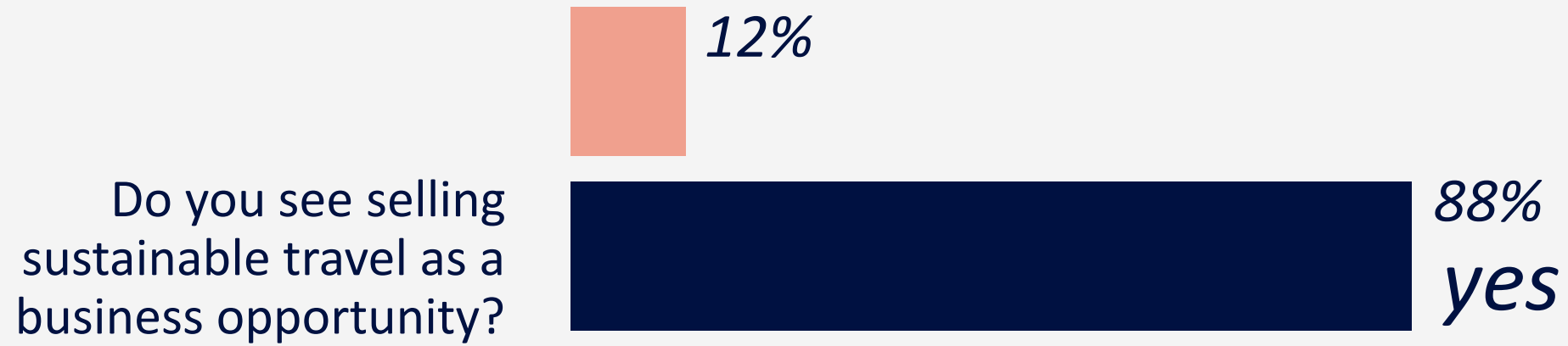
Business Focus

How focused your business is on sustainability

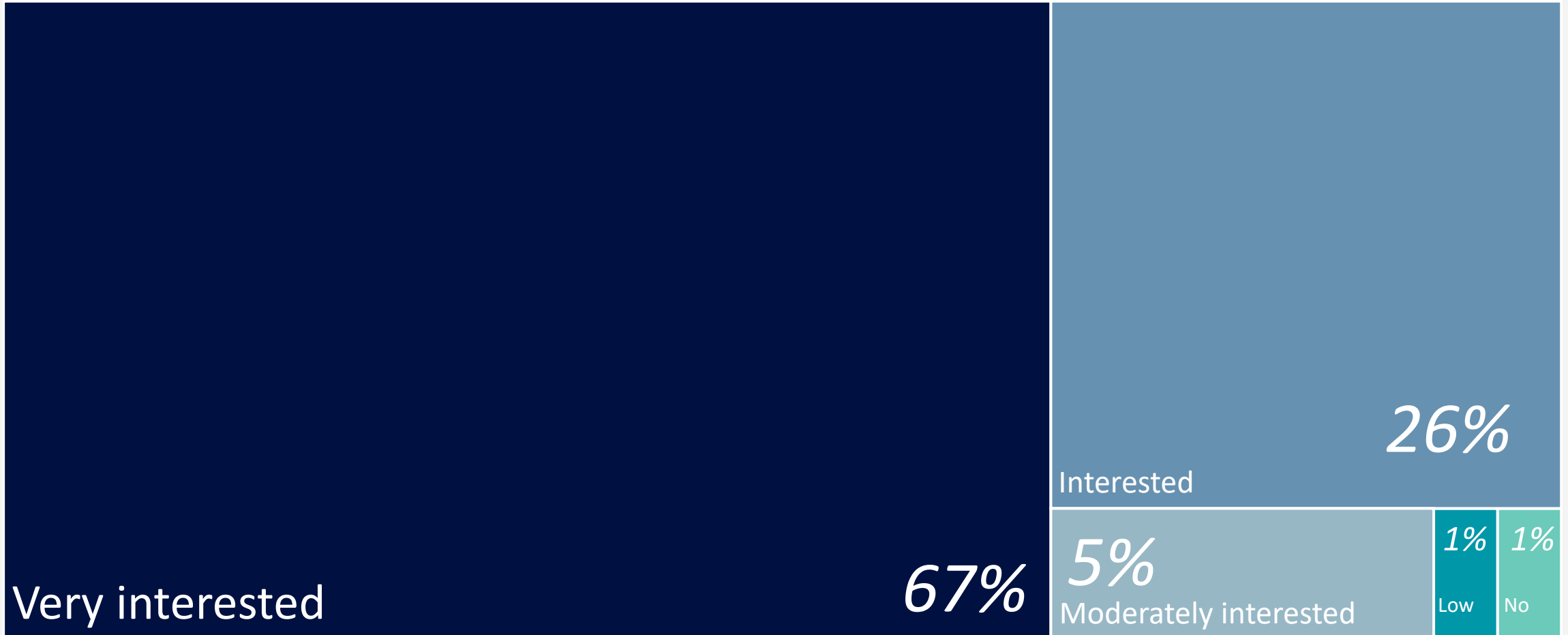


Are you already intentionally selling sustainable travel products/destinations?



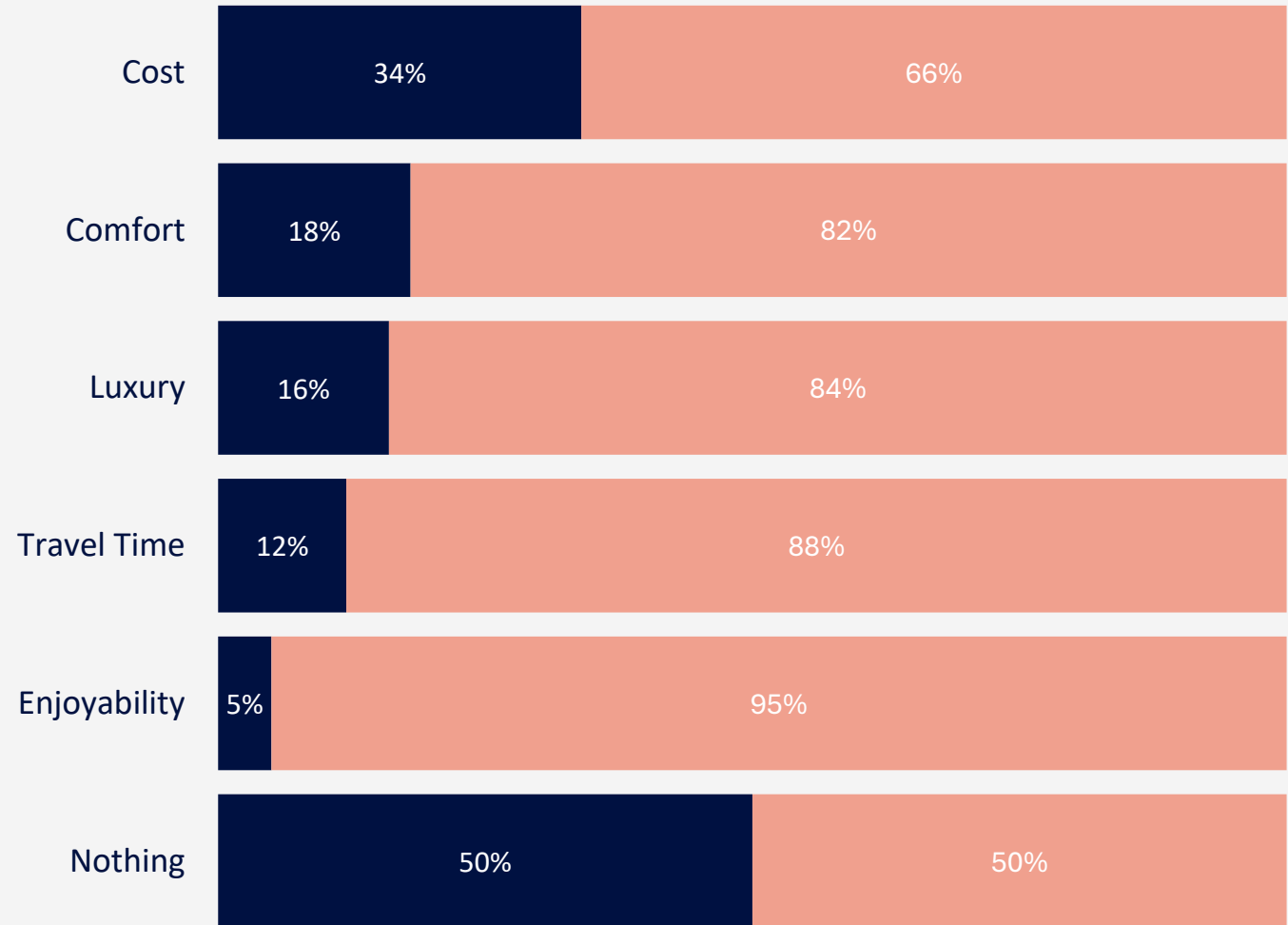


How interested are you in selling more sustainable travel products/destinations?



What do you (the travel advisor) believe is compromised when prioritizing sustainability in travel? Select all that apply

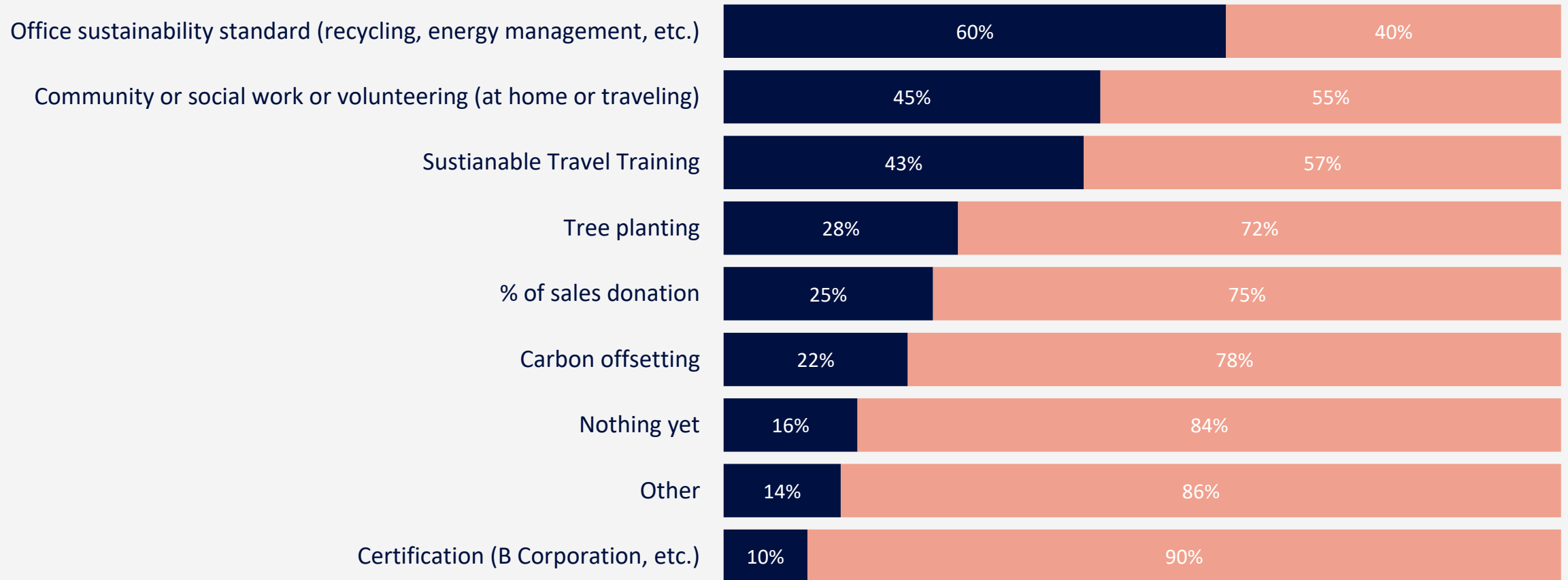
■ Yes
■ No



What sustainability programs do you have in place?

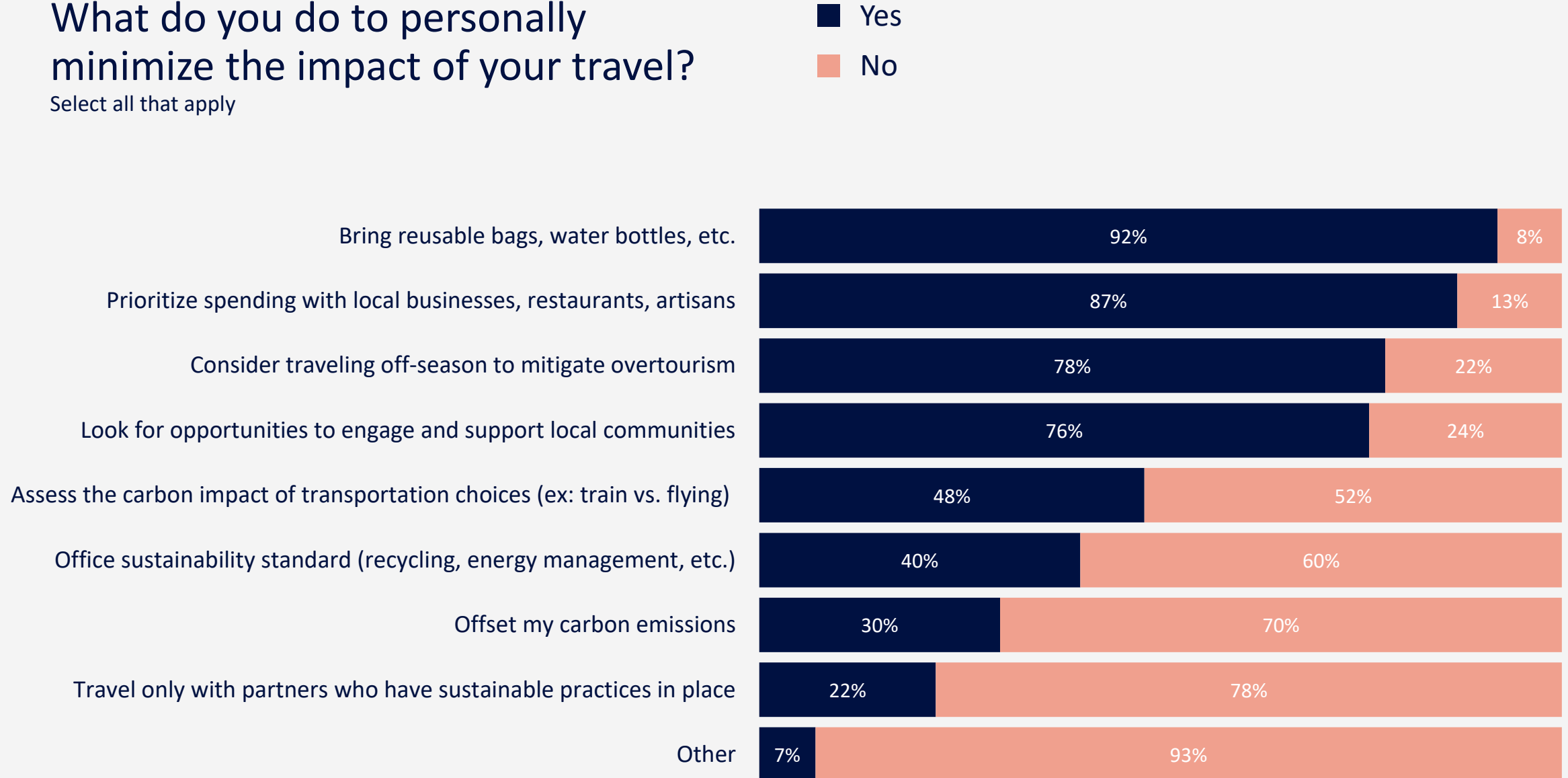
Select all that apply

■ Yes
■ No

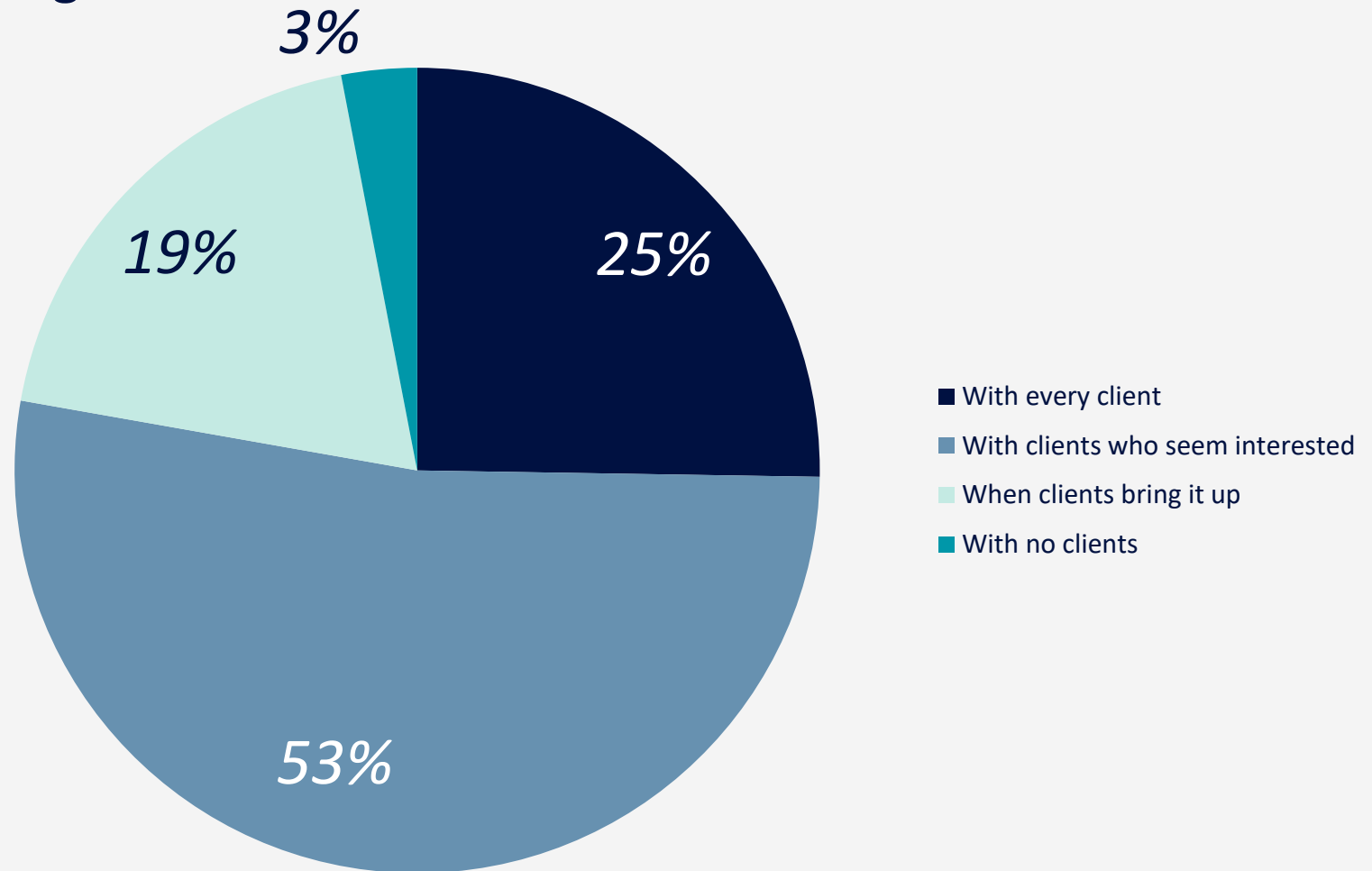


What do you do to personally minimize the impact of your travel?

Select all that apply

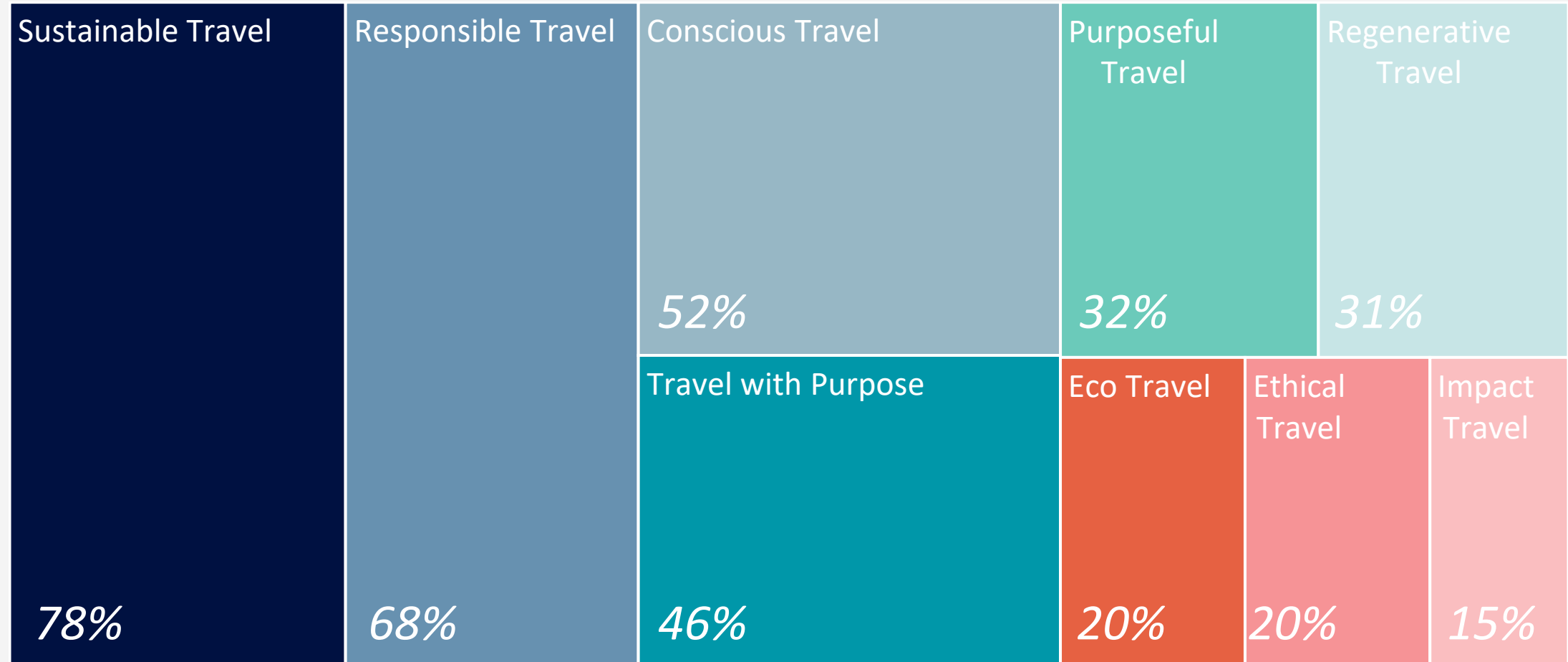


How often are you talking
to your clients about
sustainable travel
choices?



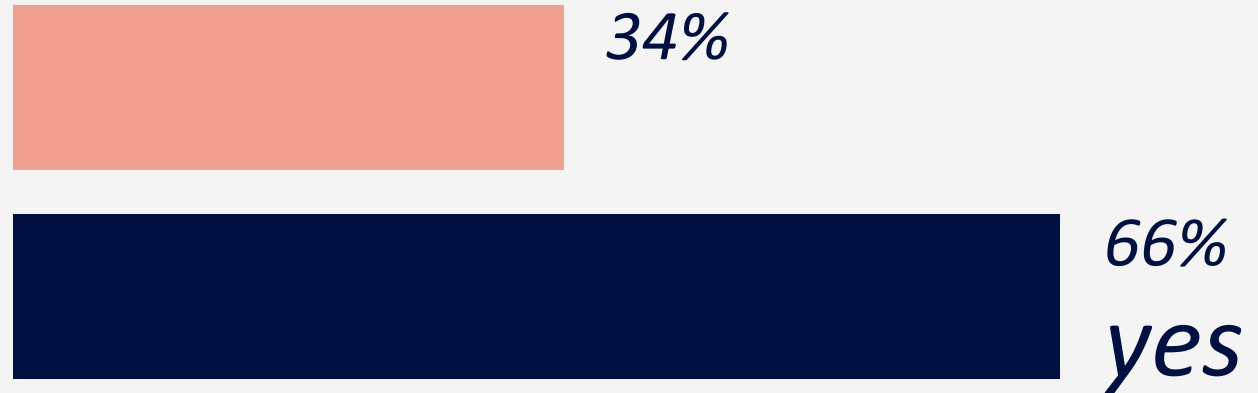
What terms do you use when talking about sustainable travel?

(select all that apply)

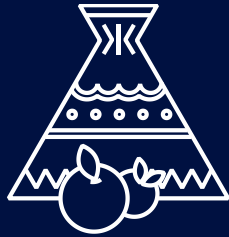


ADVISOR PERSPECTIVE ON LUXURY TRAVELER PREFERENCE AND BELIEFS

Are your clients willing to
spend more if they know
about a partner or
destination's sustainable
practices and/or projects?



What pillar of sustainability do you see your clients more inclined to support?



46%

Supporting
local economies



30%

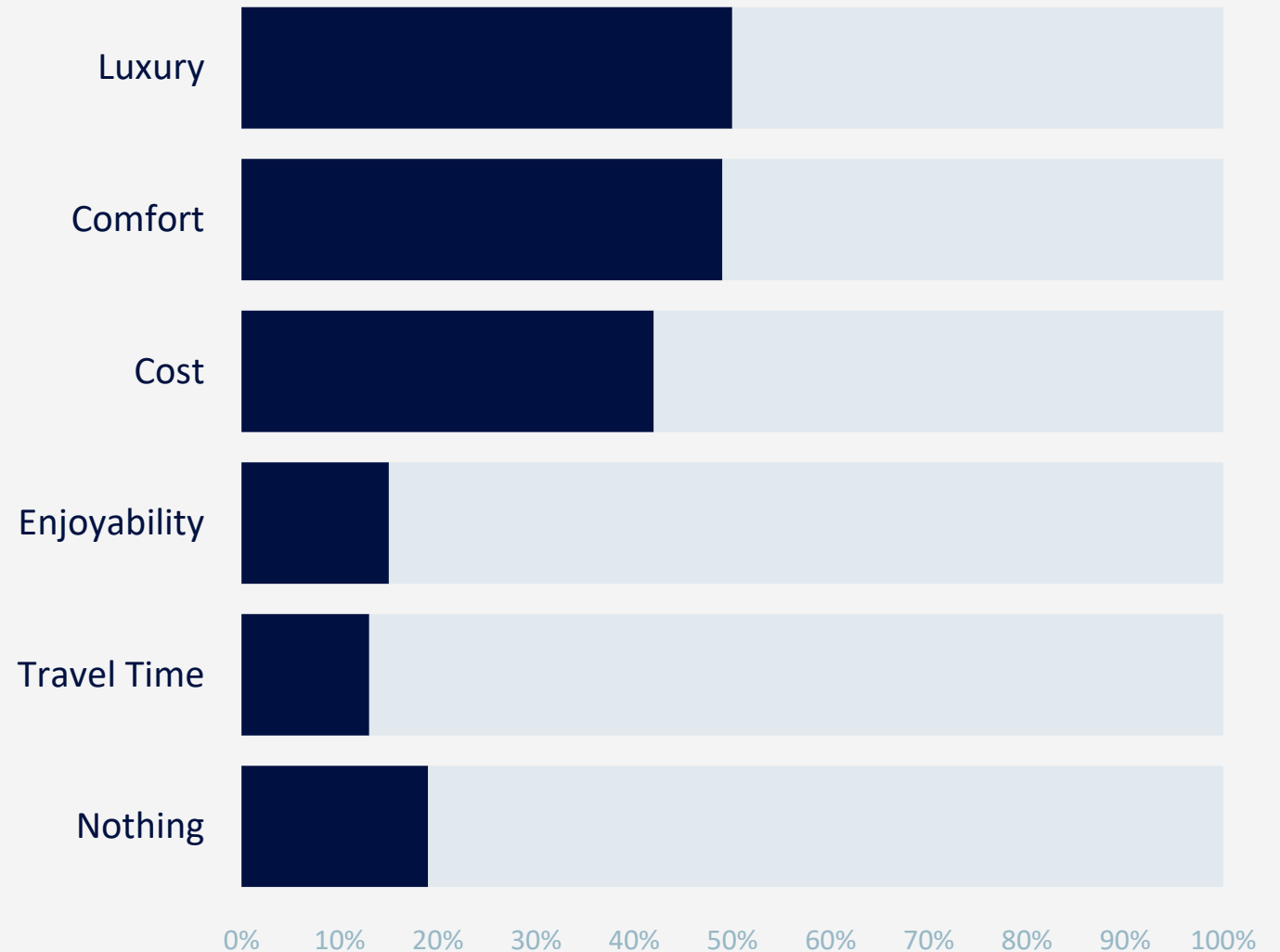
Protecting the Planet



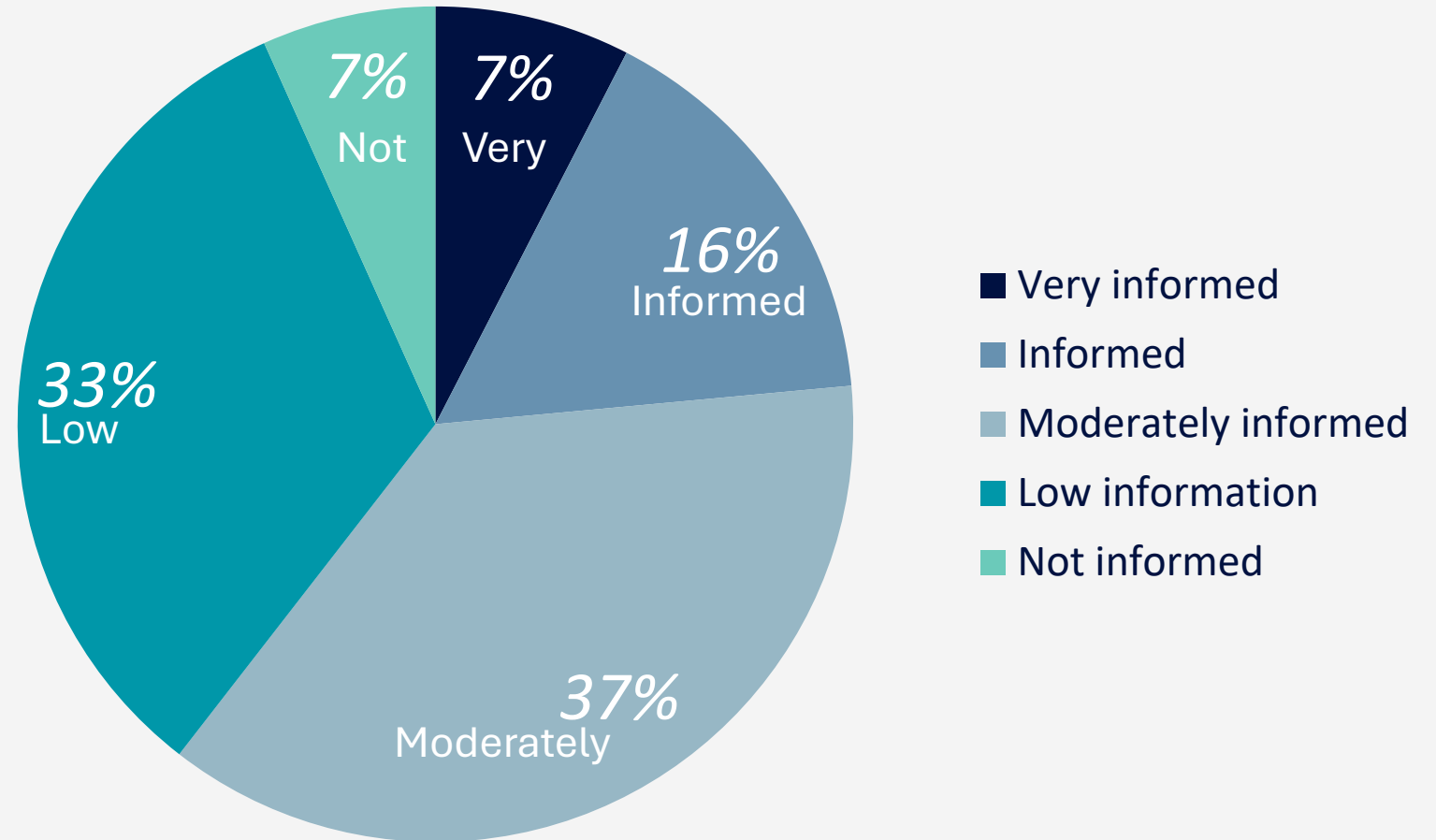
24%

Celebrating Culture

What do you think
clients/travelers believe
is compromised when
prioritizing
sustainability in travel?

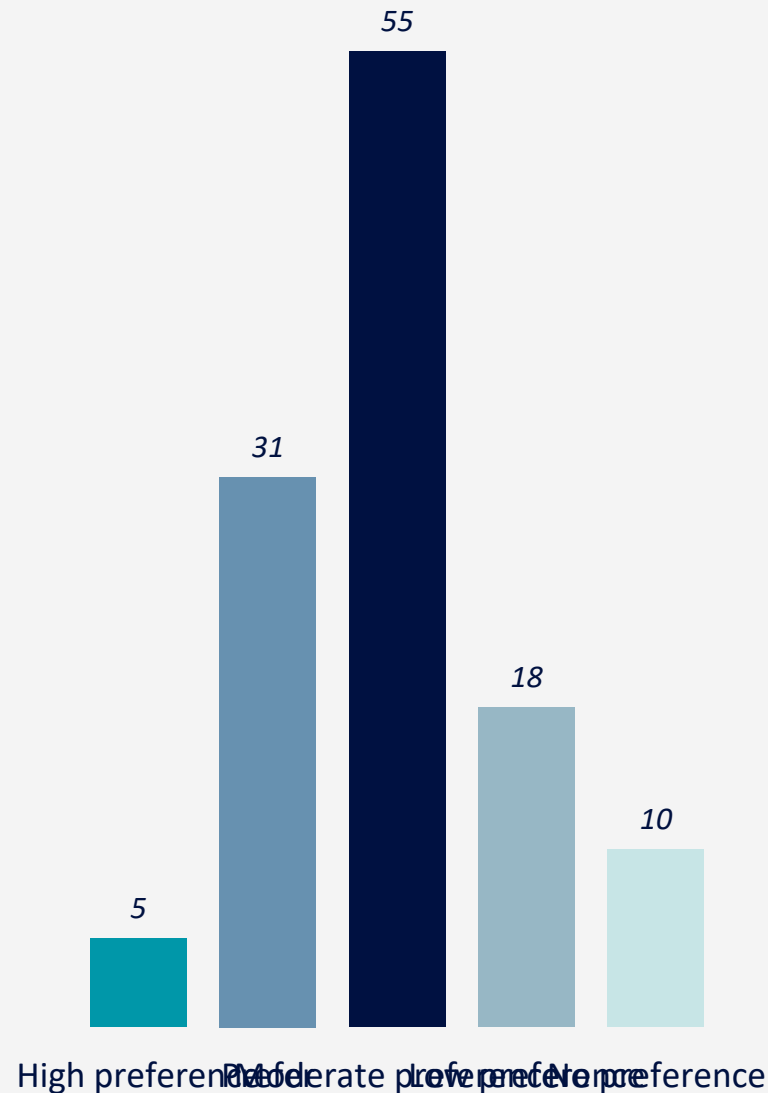


How informed are your clients about a partner or destination's sustainable practices and/or projects?



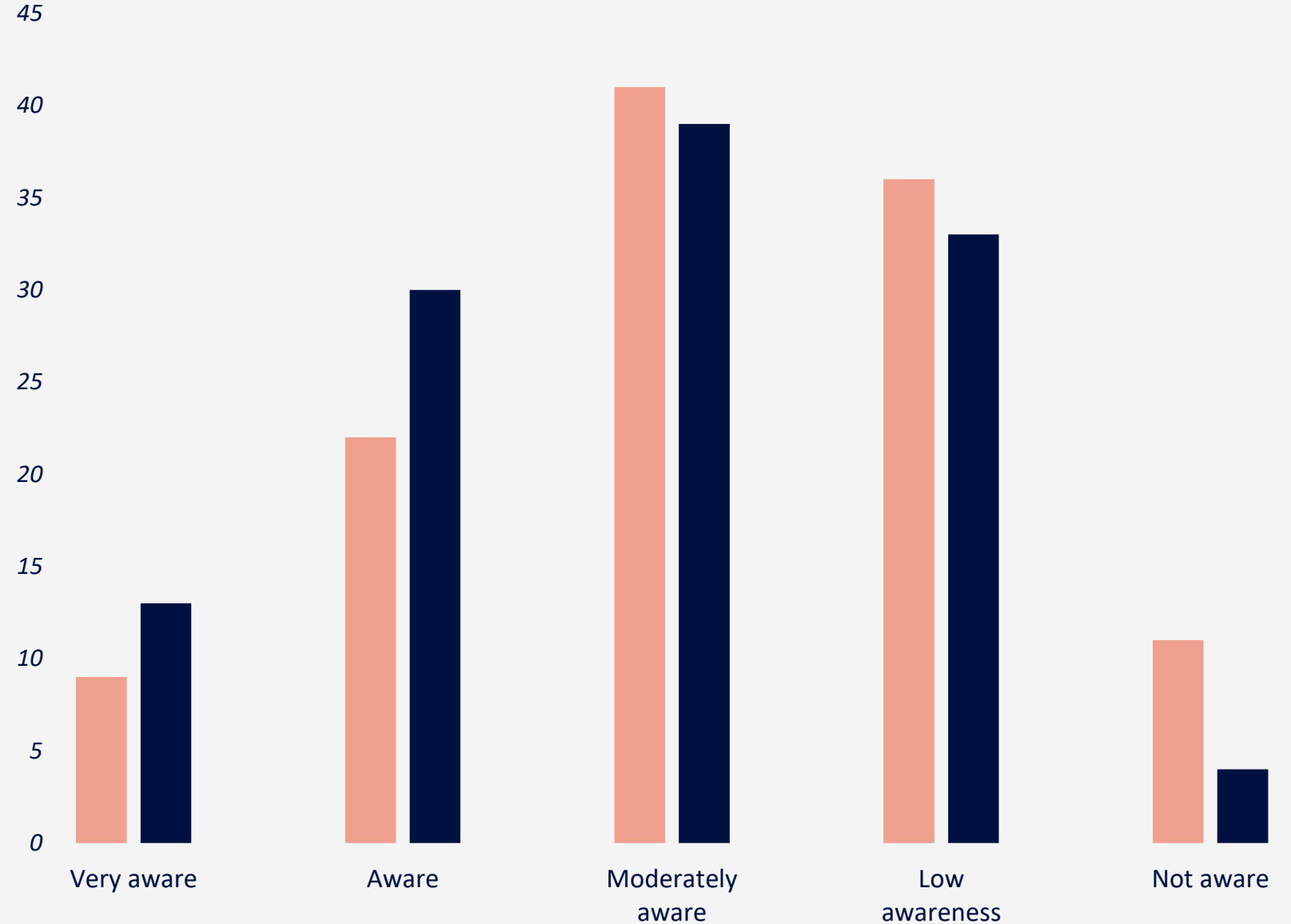
Sustainable Travel Preference

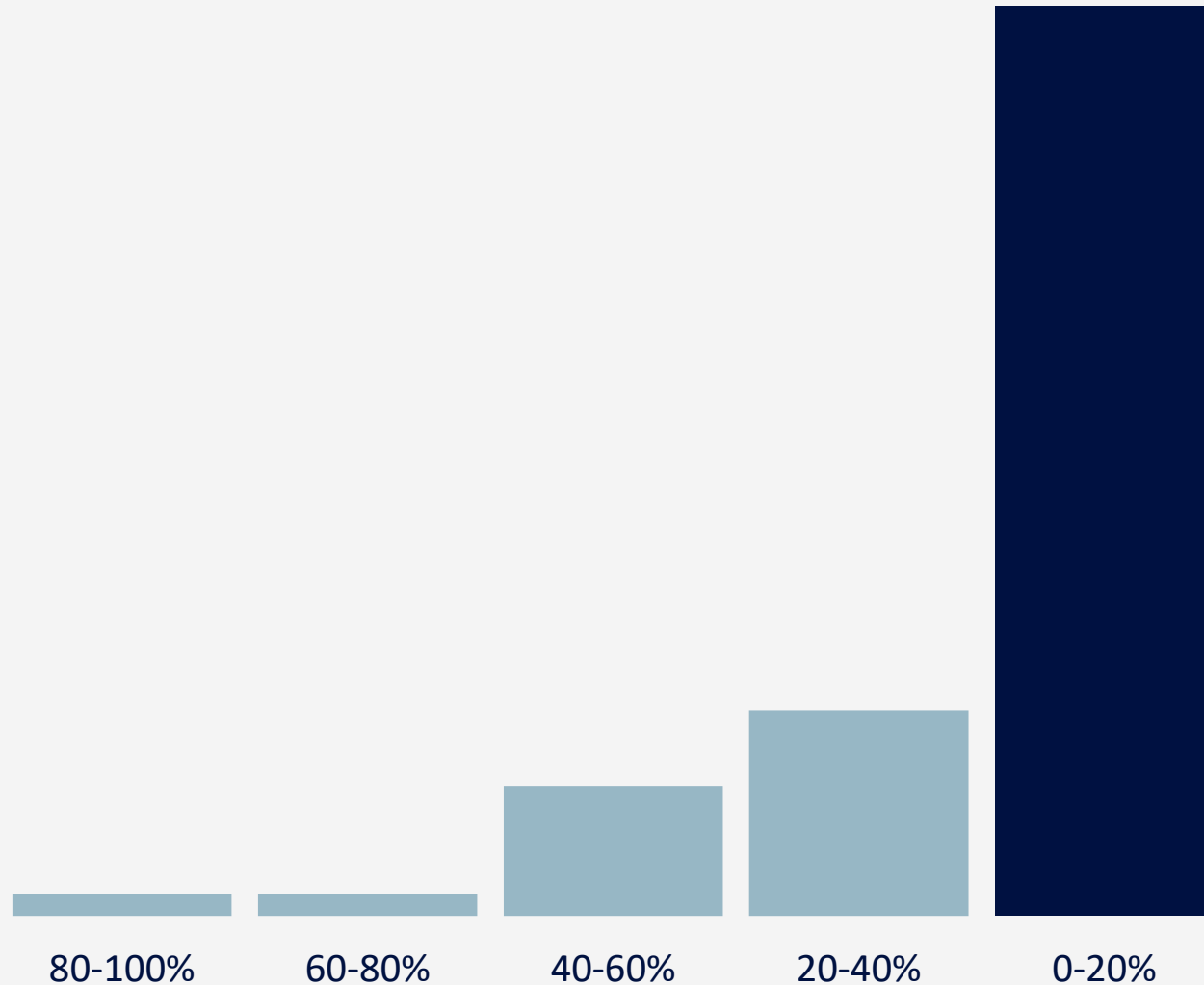
Do your clients who prioritize sustainability prefer trips with **explicit sustainable elements** (like eco-lodges or community/environmental activities) or, are they satisfied **knowing that their travels are conducted responsibly**



How aware are your clients of the potential impact that their travel choices have?

■ Positive Impact
■ Negative Impact





What portion of your clients offset the carbon emissions of their travel?

Climate

Is changing climate and/or extreme weather events and conditions affecting travel planning and choices?



Are your clients open to travel at off-season/off-peak times due to the climate?



■ Yes
■ No

Are your clients choosing to travel at off-season/off-peak times due to the climate?



Are your clients traveling to alternative destinations due to climate?

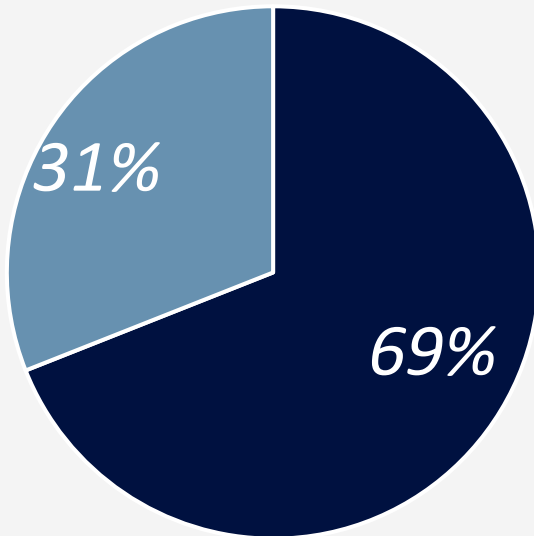


Are your clients open to exploring alternative destinations due to climate?



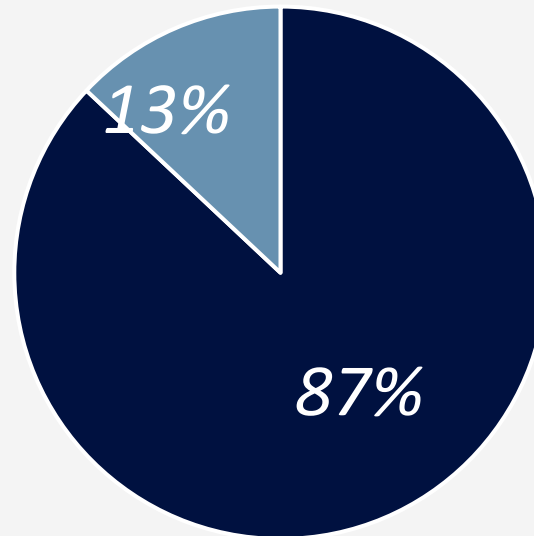
Overtourism

Are your clients **traveling** to alternative destinations due to overtourism?



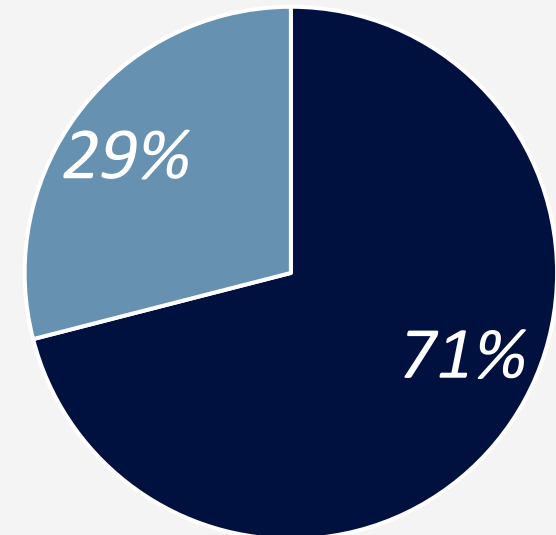
■ Yes

Are your clients **open** to exploring alternative destinations due to overtourism?



■ Yes

Are your clients **avoiding** certain destinations due to overtourism?



■ Yes

What are some alternative destinations you are sending your clients to?

- Antarctica
- Australia
- Bhutan
- Colombia
- Costa Rica
- Iceland
- New Zealand
- South Africa
- Vietnam
- Slovenia, Croatia and Portugal as *(alternative to Italy)*
- Croatia *(alternative to Italy)*
- Portugal *(alternative to Italy)*
- Montenegro *(alternative to Croatia)*
- Scandinavia *(alternative to Western or Southern Europe)*
- Guatemala *(alternative to Costa Rica)*

ADVISOR PERSPECTIVE ON PARTNERS & DESTINATIONS

Because sustainability covers so many aspects of business, **what are the mandatory things that you expect from “sustainable” travel suppliers?**

Select all that apply

■ Yes
■ No

0% 20% 40% 60% 80% 100% 120%



What helps you **trust** that preferred partners and/or destinations are truly sustainable?

Select all that apply

■ Yes
■ No

0% 20% 40% 60% 80% 100% 120%

Partner staff are knowledgeable and share about sustainability work



Metrics that show impact



Sustainability certifications



Videos, photographs, stories that show impact



Featured in Virtuoso sustainable marketing, editorial, and/or community



Other



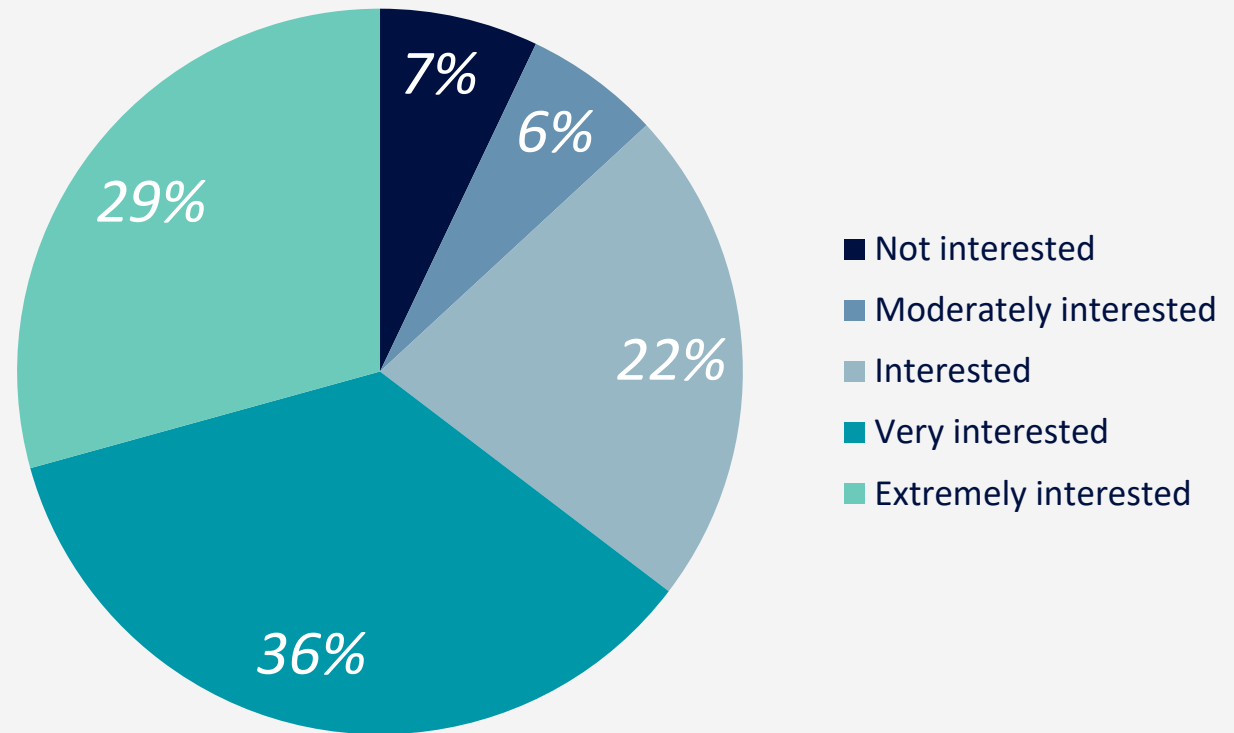
**Off the top of your head,
please name up to five
destinations that you believe
are most "sustainable"**

- Costa Rica
- Iceland
- New Zealand
- Norway
- Bhutan
- Galapagos
- Slovenia
- Switzerland
- Kenya
- Finland
- Botswana
- Portugal
- Canada
- Australia
- South Africa
- Maldives
- Ecuador
- Peru
- Denmark
- Tanzania
- Copenhagen
- Panama
- Sri Lanka
- Japan
- Singapore
- France

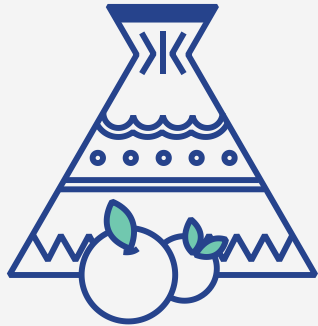
VIRTUOSO IMPACT REPORT SUSTAINABLE TRAVEL 2024: TRAVELER HIGHLIGHTS

How interested are you
in making sustainable
travel choices during
your trips?

**64 % of Virtuoso
travelers aspire to
travel more sustainably**



Virtuoso Travelers are willing to pay more for companies that...



35%

Benefit Local People
and Economy



30%

Adopt Environmentally-
Friendly Philosophies and
Practices



35%

Preserve Natural and
Cultural Heritage

VIRTUOSO IMPACT REPORT SUSTAINABLE TRAVEL 2024

To learn more about Virtuoso and our partner's sustainability efforts, visit:
[Sustainable Travel for Virtuosos](#) and sign up for our newsletter.

Or contact us at sustainability@virtuoso.com

Jessica Hall Upchurch, Vice Chair and Sustainability Strategist
Javier Arredondo, VP Sustainability
Keriann Ashley-Chase, Manager, Sustainability Programs

