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GSTC Conference 2022
Data, trends and stats session
Tuesday 13th December

Net Zero & Environmental Strategies for Travel, Tourism & Hospitality
How engaged is travel & tourism with sustainability?

The Tour Operator
“...Not a priority.”

The Hotelier
“We can’t be sustainable. We have too many heritage buildings with high energy needs.”

The sector trade association
“Sustainability is still a minority sport.”
Size & scope of adoption

600,000 accommodation providers in Europe alone Statista

196,000 intermediaries globally (travel agents / tour operators etc. Statista

> 1 million activities & visitor attraction providers globally Arival

• $181 billion “Eco-tourism sector”
• $338 billion forecast size by 2027
• $5.8 trillion total size of travel, tourism & hospitality sector Statista
“Tours & Activities is not a vertical”

Four-Wheel Drive (4WD) Tours & Excursions Dolphin & Whale Watching Parasailing & Paragliding Adrenaline & Extreme Tours Duck Tours Photography Tours Air Tours Eco Tours Private Tours Ancient Ruins Factory Tours Rail Tours Antique Stores Fashion Shows & Tours River Rafting & Tubing Aquariums Fishing Charters & Tours Room Escape Games Archaeology Tours Food Tours Running Tours Art & Music Tours Gear Rentals Safaris Art Galleries Ghost & Vampire Tours Scavenger Hunts Art Museums Ghost Towns Scenic Railroads ATV & Off-Road Tours Golf Courses Science Museums Auto Race Tracks Gondola Cruises Scooter & Moped Tours Ballets Helicopter Tours Scuba & Snorkeling Balloon Rides Hiking & Camping Tours Segway Tours Battlefields Historic Sites SelfGuided Tours & Rentals Beer Tastings & Tours Historical & Heritage Tours Shark Diving Bike Tours History Museums Shooting Ranges Boat Rentals Hop-On Hop-Off Tours Shopping Tours Boat Tours & Water Sports Horse-Drawn Carriage Tours Sightseeing Tours Bus Tours Horseback Riding Tours Ski & Snow Tours Bus Transportation Hot Springs & Geysers Skydiving Canyoning & Rappelling Tours Kayaking & Canoeing Specialty Museums Castles Lessons & Workshops Speed Boats Tours Caverns & Caves Lighthouses Stand-Up Paddleboarding Children’s Museums Marinas Surfing City Tours Military Museums Swim with Dolphins Classes & Workshops Monuments & Statues Theme Parks Climbing Tours Motorcycle Tours Tours Club & Pub Tours Movie & TV Tours Walking Tours Coffee & Tea Tours Multi-day Tours Water & Amusement Parks Concerts & Shows Museums Water Parks Cooking Classes National Parks Waterskiing & Jetskiing Cultural Tours Natural History Museums Windsurfing & Kitesurfing Cycling tours Nature & Wildlife Tours Wine Tours & Tastings Dams Night Tours Wineries & Vineyards Day Trips Observation Decks & Towers Zipline & Aerial Adventure Parks Dinner Theaters Observatories & Planetariums Zoos Distillery Tours Off-R
Business is the most trusted institution and is expected to address societal issues

CEOs Expected to Be the Face of Change

Percent who say

CEOs should be personally visible when discussing public policy with external stakeholders or work their company has done to benefit society

Global 27

81% (net)

Global 25, Among employees

60%

↑ 5 pts

Change, 2019 to 2022

All Stakeholders Hold Business Accountable

Percent who agree

Global 27

58%

Buy or advocate for brands based on their beliefs and values

Global 7

88%

Invest based on their beliefs and values

60%

Choose a place to work based on their beliefs and values

64%

Source: 2021 Edelman Trust Barometer Special Report: Institutional Investors
The compelling case of Self-interest ...

70% of consumers are looking for sustainable products from their travel suppliers [2]

86% of EMEA investors stated that sustainability is or will be key to their investment strategies [3]

25% of costs could be covered by grants. (available from UNWTO supported green investment schemes)

Governments are under pressure to meet Paris accord targets, prepare for the likely introduction of “carrot and stick” regulation.

93% of the world’s largest corporates now report on energy, carbon and waste [1]

(Resulting in procurement managers seeking low carbon hotels & events, and putting green requirements into RFPs)

92% of under 30’s prefer to work for organisations with green credentials. (with staff productivity rising a corresponding 16%) [4]

Carbon data from air & land services is being transparently displayed in corporate, leisure & groups segments.

**Search Engines (Google):**
Displays flight & hotel emissions data

**ESG requirements:**
Drive net zero commitments from finance & corporates.

**COP26:**
“Measure or you are not reducing”

**Cascades to the Leisure Travel sector**

- **On-line OTA’s**
  Booking.com and Skyscanner display sustainable criteria

- **Off-line Tour Operators**
  The Travel Corporation, TUI & Intrepid commit to SBTs

**Cascades to the Business Travel sector**

- **The MICE sector**
  Measures event footprints responding to corporate demands

- **TMCs**
  HRS Green stay, CWT, Amex GBT, Travel Perk display hotel carbon footprints for business travelers

… why carbon is now a commercial issue in the value chain:
What is 50% of something?
So what is the carbon footprint of my flight?

Sample: return flights non-stop London Heathrow to Athens on British Airways, of 4,800 kms, economy class May 2023

316 kg CO₂

“Greener Choice: This flight emits 11% less CO₂ than the average for your search”

804 kg Co₂
Inc. the DEFRA factor for Radiative Forcing (RF) of 1.9 times.
Calculation: (0.15102 + 0.01654) x 4800kms = 804 kgs
Eurostar emissions: London to Paris

17 kg CO₂

Own site
4 kg CO₂
Good Initiative: Train Over Plane

**Stage One**

Active legislation or ongoing conversations about phasing-out specified flight routes that can be completed by train in less than 2.5 hours.

Implementing this rule across France, Spain, Austria and The Netherlands means...

- **2.4 million extra passengers**
  would take the train every year.

- **320,000 tonnes**
  worth of carbon emissions would be saved each year.

- **320,000 trees**
  would absorb this amount of carbon over an entire century.
Train Over Plane

Stage Three
An EU-wide agreement to replace all domestic and intra-EU flight routes that can be completed by train in less than 4 hours. Implementing this rule across all EU countries means...

243 million extra passengers would take the train every year.

36 million tonnes worth of carbon emissions would be saved each year.

32 million US homes could be lit for a year using the equivalent electricity output and carbon emissions of a coal-fired power station.
Filter by: Electric vehicle charging station 32/1560

Seville: 32 properties found

Based on your filters, 98% of places to stay are unavailable on our site.
• Natural History Museum
• Holistic Approach
• Global view Biodiversity loss
• Only darkest areas within planetary boundaries

https://www.nhm.ac.uk/our-science/data/biodiversity-indicators.html
• Our sector is **Behind the Curve**
• Long tail to be addressed
• One language - transparent
• Business engaged & aligned
• Coherent & accurate Data

**Thankyou**