

Patrick Richards – Director TerraVerde Sustainability Ltd

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 sector trade association

"Sustainability is still a minority sport."

The Hotelier

"We can't be sustainable. We have too many heritage buildings with high energy needs."



Size & scope of adoption



600,000
accommodation
providers in
Europe alone Statista



> 1 million activities &
visitor attraction
providers globally Arival



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



- **\$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)

When considering a job, I expect the CEO to speak publicly about **controversial social and political issues that I care about**

Global 25,
Among employees

60%



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

60%

Choose a place to work based on their beliefs and values

64%

Invest based on their beliefs and values

88%

of institutional investors subject ESG to the same scrutiny as operational and financial considerations

Global 7

Source: 2021 Edelman Trust Barometer
Special Report: Institutional Investors

The compelling case of Self-interest ...



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



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)



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



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



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.

... why carbon is now a commercial issue in the value chain:

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

COP26:
"Measure or you are not reducing"

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

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

Cascades to the **Leisure Travel sector**

Cascades to the **Business 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

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

What is

50% of
something?



So what is the carbon footprint of my flight?



316 kg CO₂

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



**“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: $(0.15102 + 0.01654) \times 4800\text{kms} = 804 \text{ kgs}$

Eurostar emissions: London to Paris



17 kg CO₂



Own site

4 kg CO₂

-

Good Initiative: Train Over Plane

Stage One

Next stage →

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.

Home > Spain >

Filter by: Electric vehicle charging station 32/1560

Search

Destination/property name:

Seville

Check-in date

Monday 19 December 20...

Check-out date

Friday 23 December 2022

4-night stay

2 adults · 0 children · 1 room

Entire homes & apartments

I'm travelling for work

Search

Seville: 32 properties found

Show on map

Sort by: Our top picks

Based on your filters, 98% of places to stay are unavailable on our site.

Commission paid and other benefits may affect an accommodation's ranking. Find out more.



Vincii La Rabida ★★★★★

Old town, Seville - Show on map - 250 yards from centre

Travel Sustainable property

Double or Twin Room (1-2 Adults)

Beds: 1 double or 2 singles

FREE cancellation • No prepayment needed

You can cancel later, so lock in this great price today.

Fabulous 8.7
5,069 reviews

Location 9.6

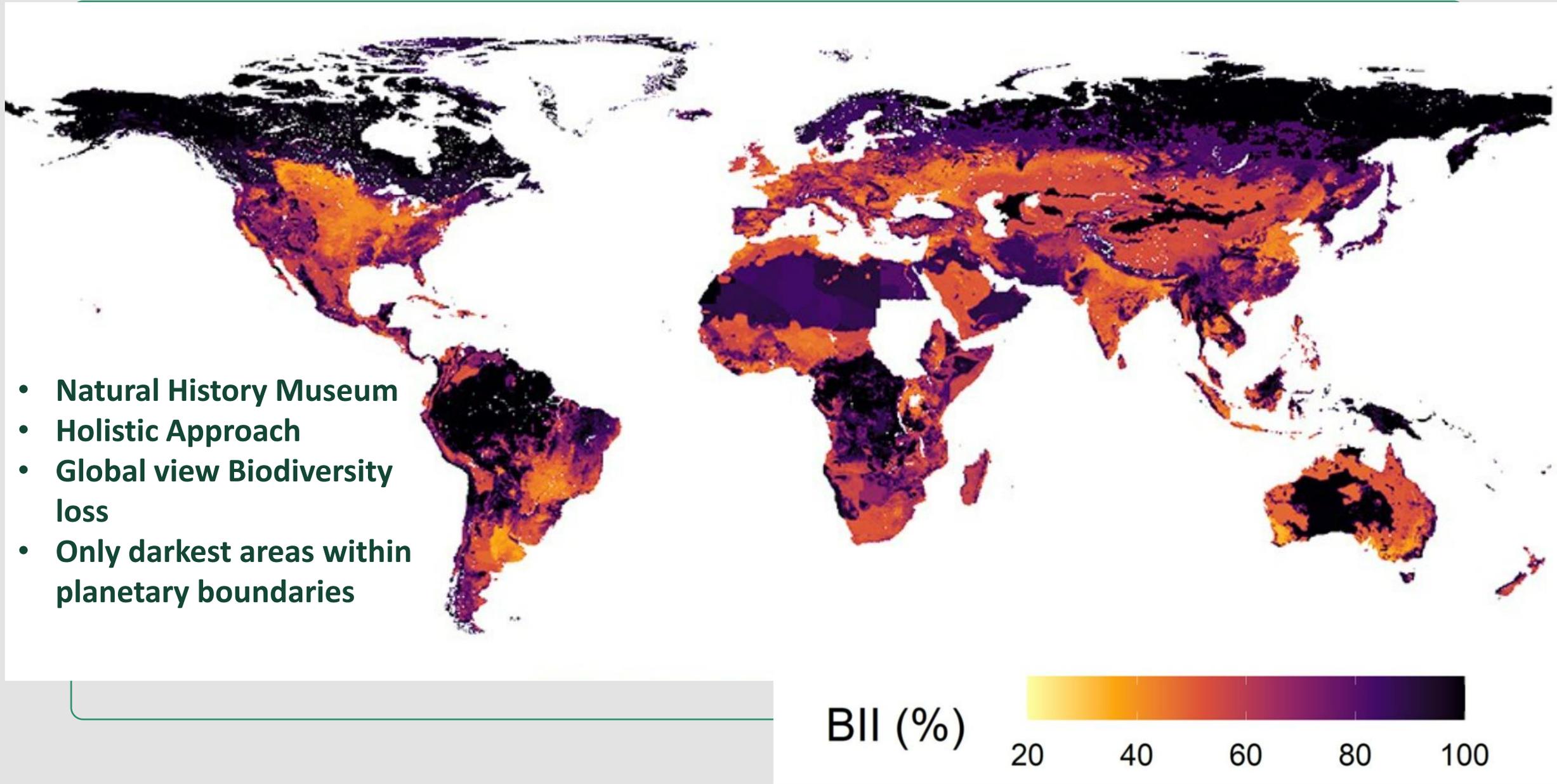
4 nights, 2 adults

€396 €356

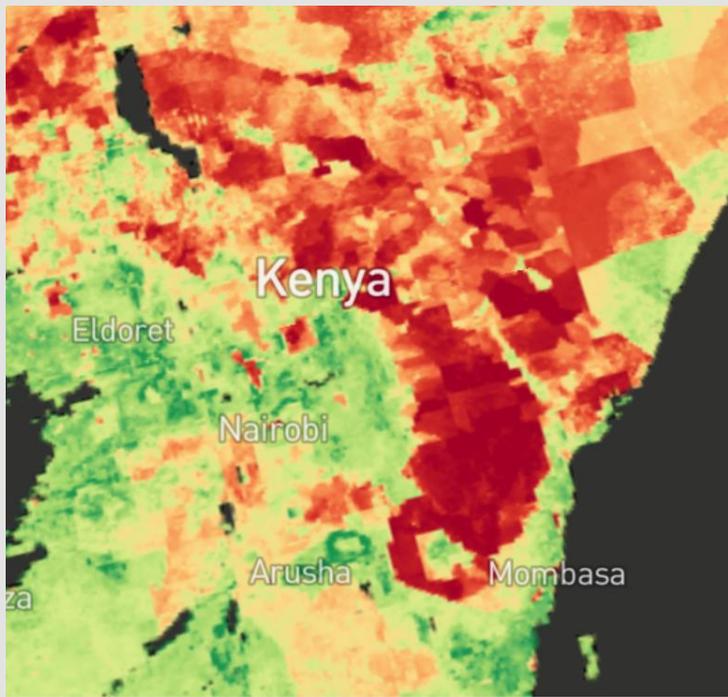
Includes taxes and charges

See availability

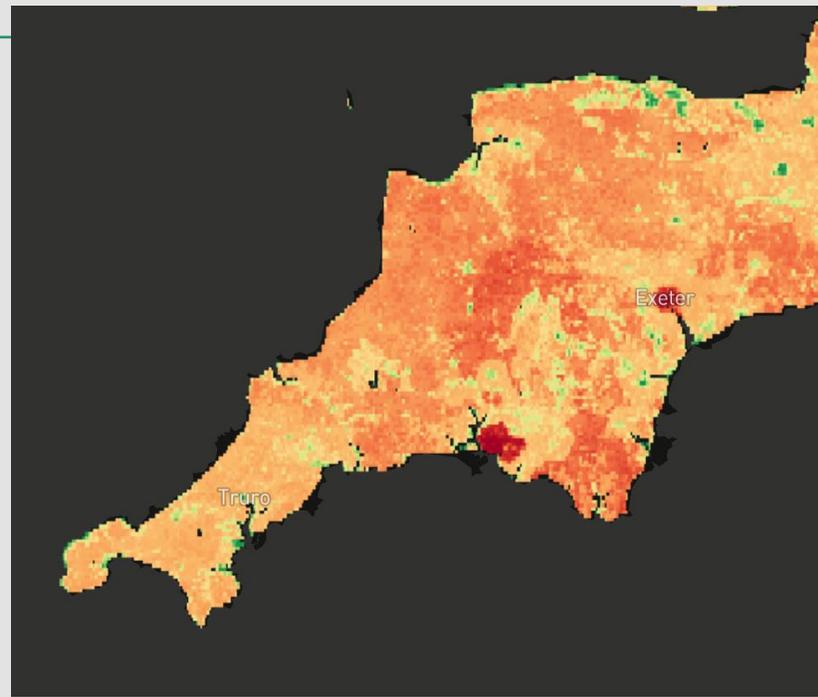
Filter by:



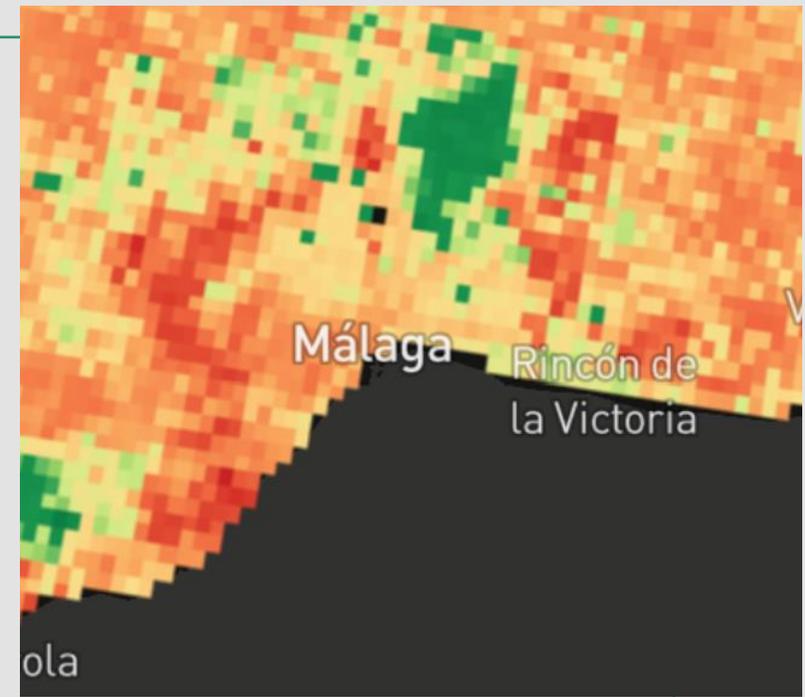
- **Natural History Museum**
- **Holistic Approach**
- **Global view Biodiversity loss**
- **Only darkest areas within planetary boundaries**



Kenya



Cornwall



Andalucía



- *Our sector is Behind the Curve*
- *Long tail to be addressed*
- *One language - transparent*
- *Business engaged & aligned*
- *Coherent & accurate Data*

Thankyou

