



Pathway to Carbon Net Zero A global overview

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Content

- Overview of T&T's Environmental Performance
- WTTC Net Zero guidance
 - Net Zero Roadmap
 - Hotel Sustainability Basics
 - ...and more!



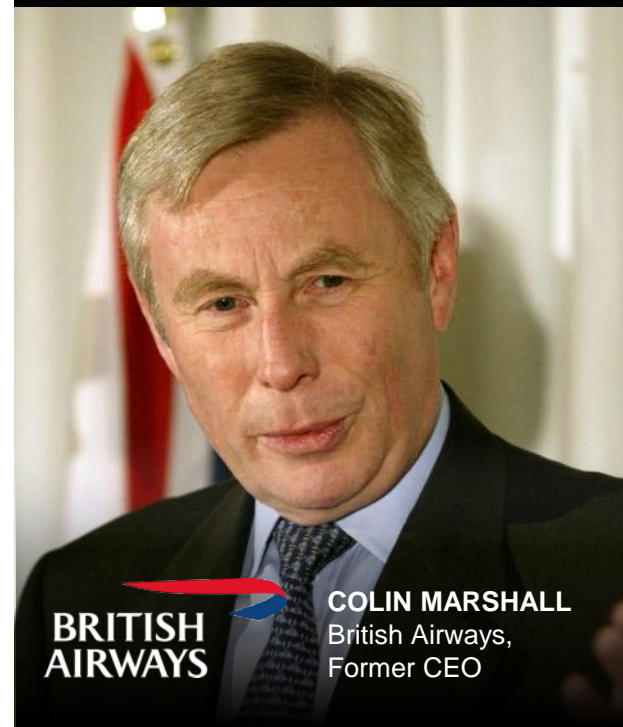
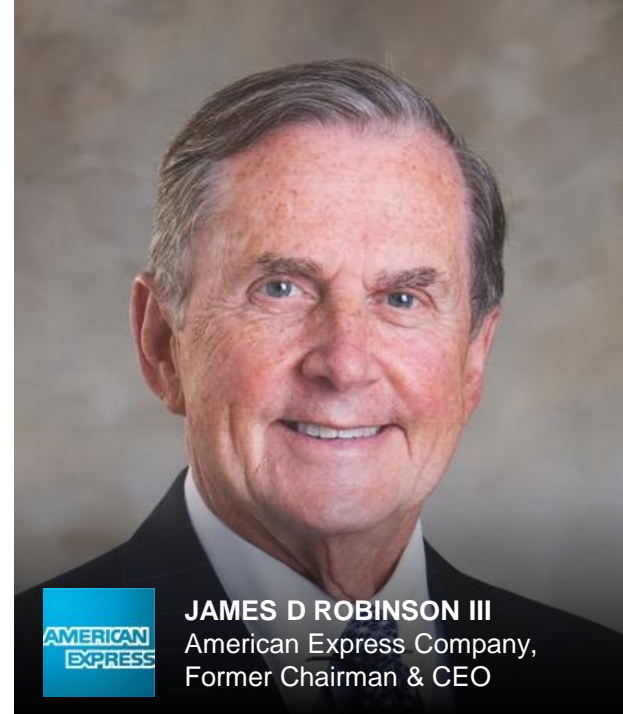
The Authority on World Travel & Tourism

The body representing the global Travel & Tourism private sector

For 30 years we have been quantifying the impact of Travel & Tourism in 185 countries in our Research

Our goals include highlighting:

- Economic value of Travel & Tourism
- Fair economic policies for the sector
- Long-term, sustainable growth



2023 Economic Performance



Total GDP

\$9.9TN

+23.2%
(YoY)



Total Jobs

329.6MN

+27.4MN
(YoY)



Visitor Spend

\$1.63TN

+33.1%
(YoY)

INTERNATIONAL



Visitor Spend

\$4.97TN

+18.1%
(YoY)

DOMESTIC

Environmental & Social

Building on WTTC's economic impact research, revealing T&T's environmental and social footprints. Evidence for sustainability & the sector's progress on the SDGs

ECONOMIC

- GDP Contribution
- Employment

Industry, Innovation and Infrastructure

Decent Work and Economic Growth

SOCIAL

- Employment (wage, age, gender)
- Tourism supported jobs

Gender Equality

Reduced Inequality

ENVIRONMENT & CLIMATE

- GHG emissions
- Water footprint
- energy source
- Air pollution
- resource input

Clean Water and Sanitisation

Affordable & Clean Energy

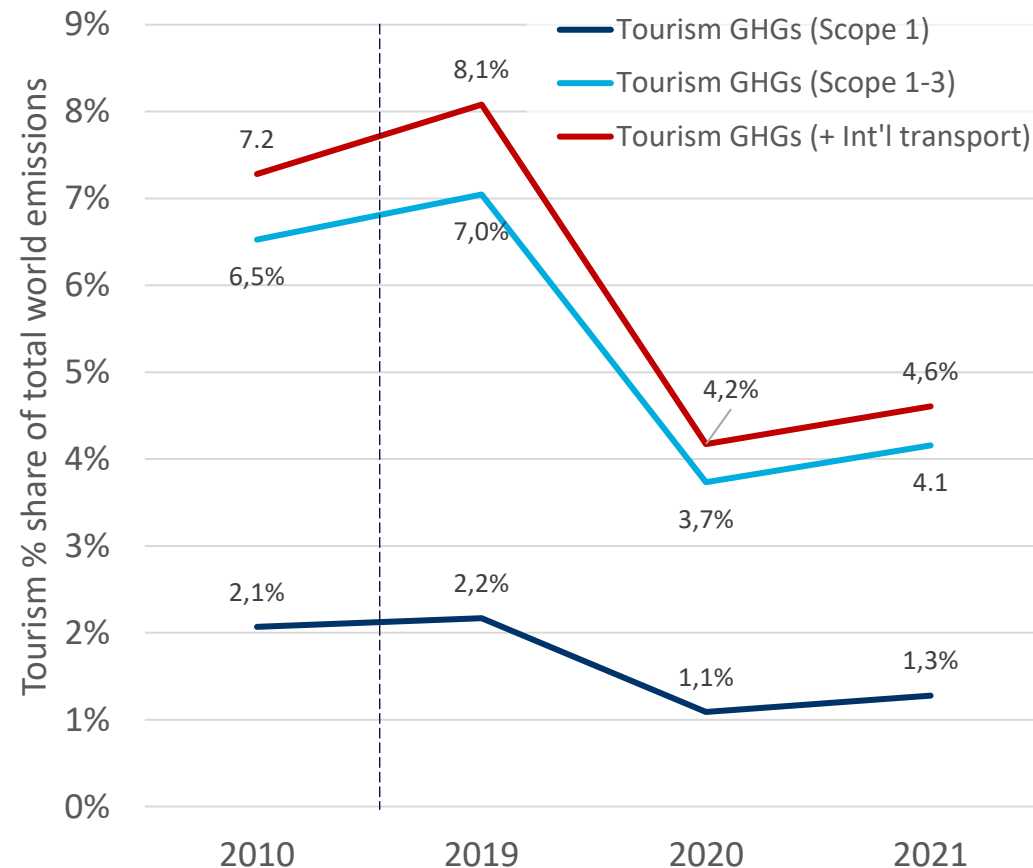
Responsible Consumption and Production



185 COUNTRIES

(global and regional), direct/indirect, subsectors for 2010, 2019, 2020 and 2021

T&T's Climate Footprint

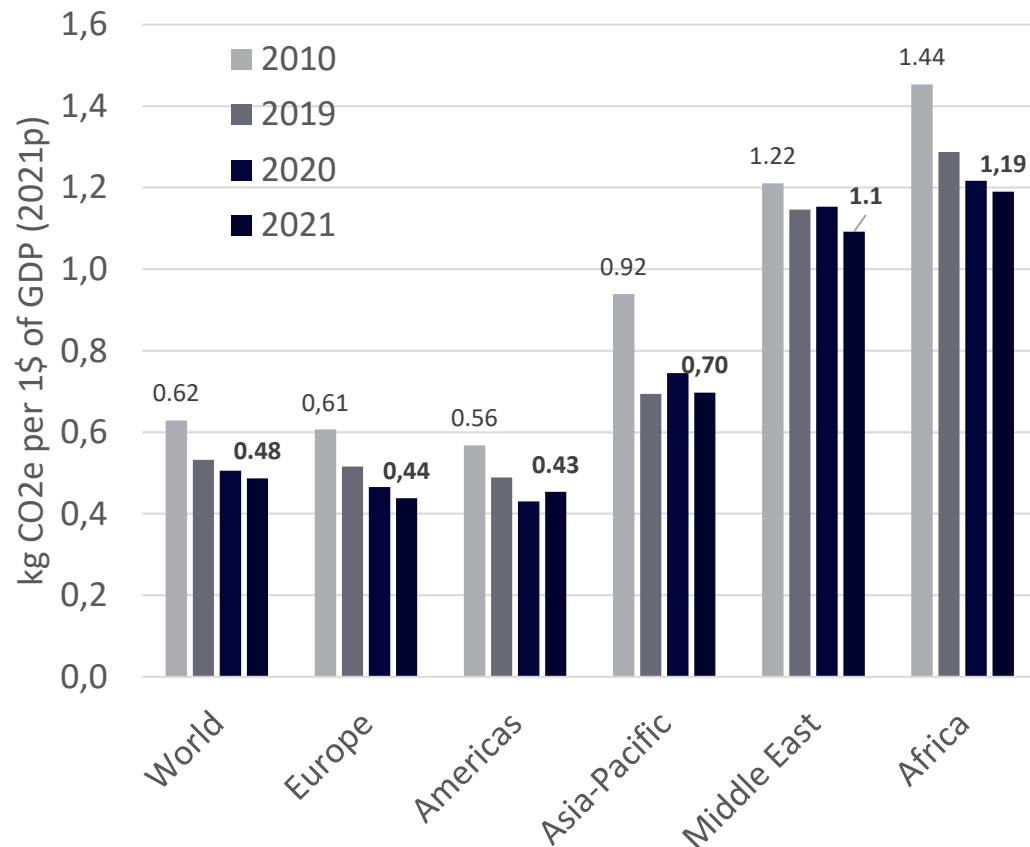


Global T&T GHG Emissions 2019

**8.1% of total
world emissions**

- T&T emissions closely linked to T&T GDP
- Scopes 2 + 3 (utilities + value chain) over 2x greater than Scope 1 (direct)

T&T Emissions Per Unit of GDP



Avg annual growth 2010-19:

T&T GDP
growth

vs

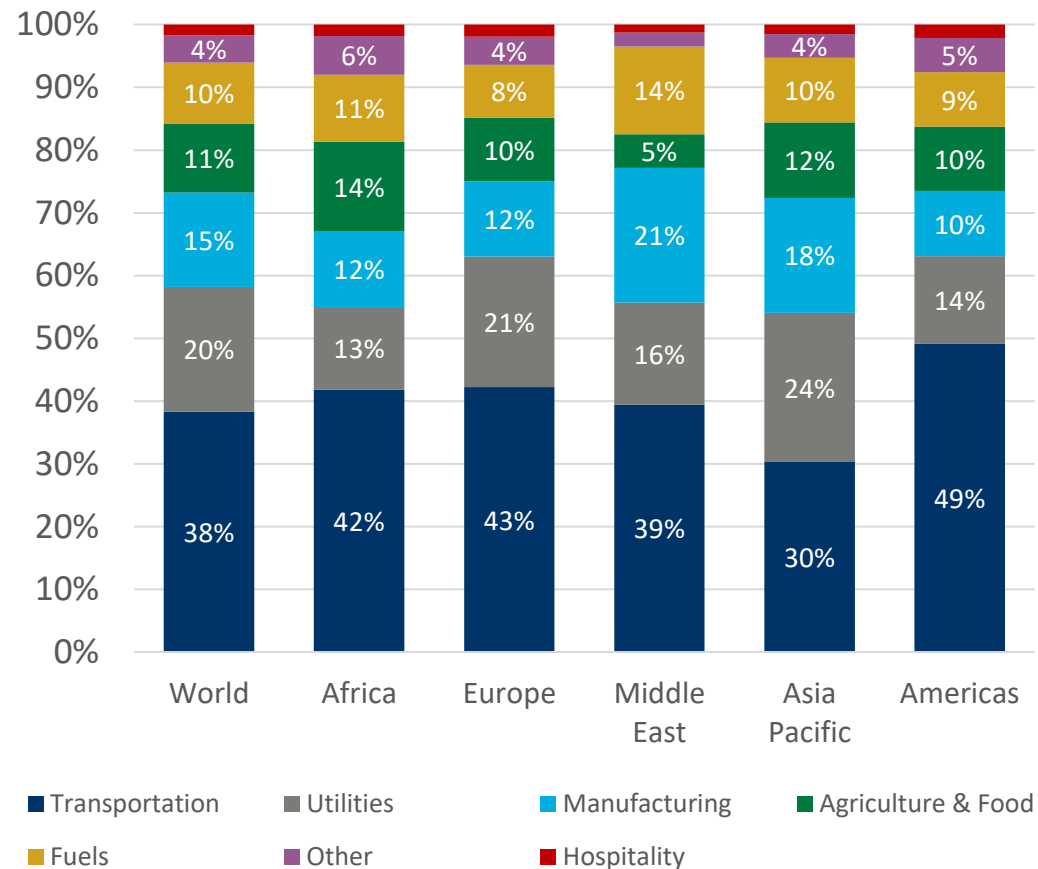
T&T GHG
footprint growth

4.3%

2.5%

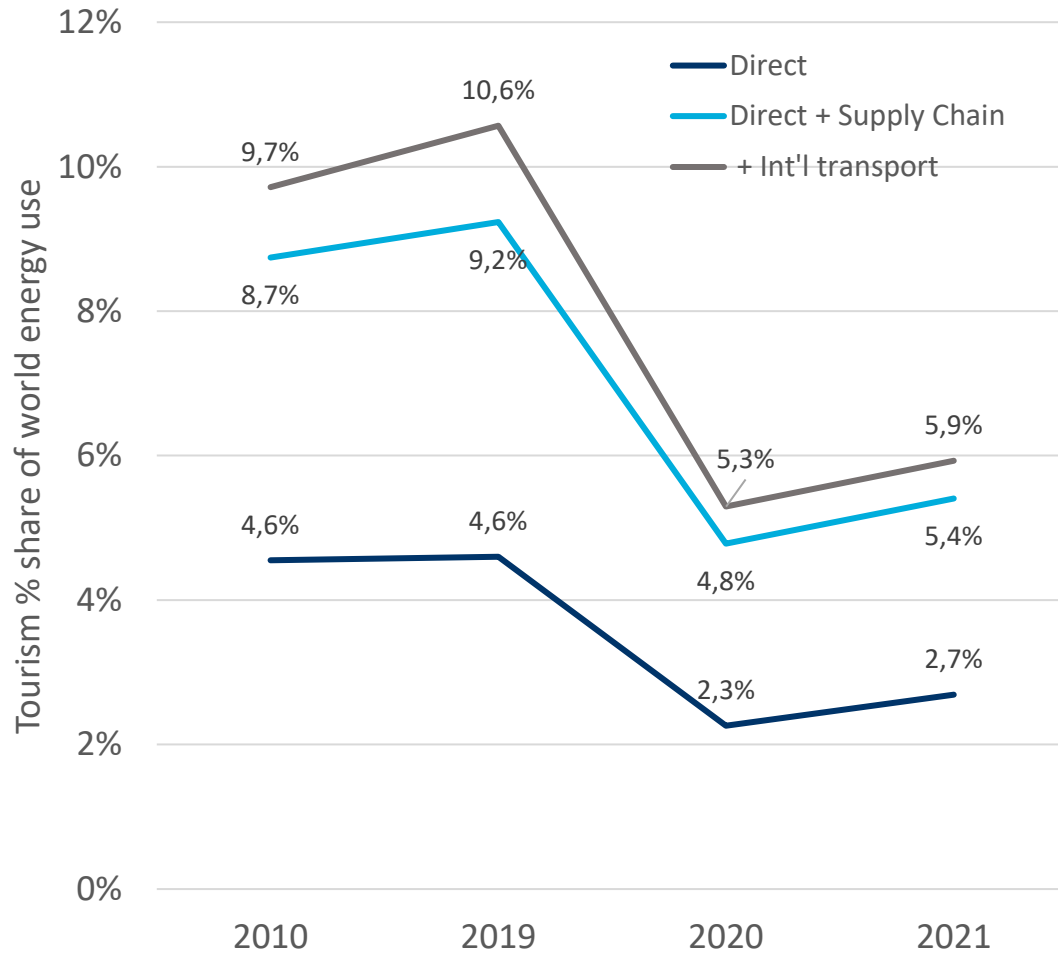
- T&T's **growth** is **decoupling** from its GHG emissions
- All world regions saw declining emissions intensity (including 135 countries)
- 15 countries saw absolute emissions drop despite growth in T&T GDP

T&T Sub-Sector Emissions (2019)



- Tourism emissions reflect its diverse mix of economic activities
- **Transport and Utilities** (purchased electricity) are key drivers of tourism emissions
- Results include Scopes 1-3 and international transport. When scope 1 is isolated, transport accounts for almost 70%

T&T Energy Use



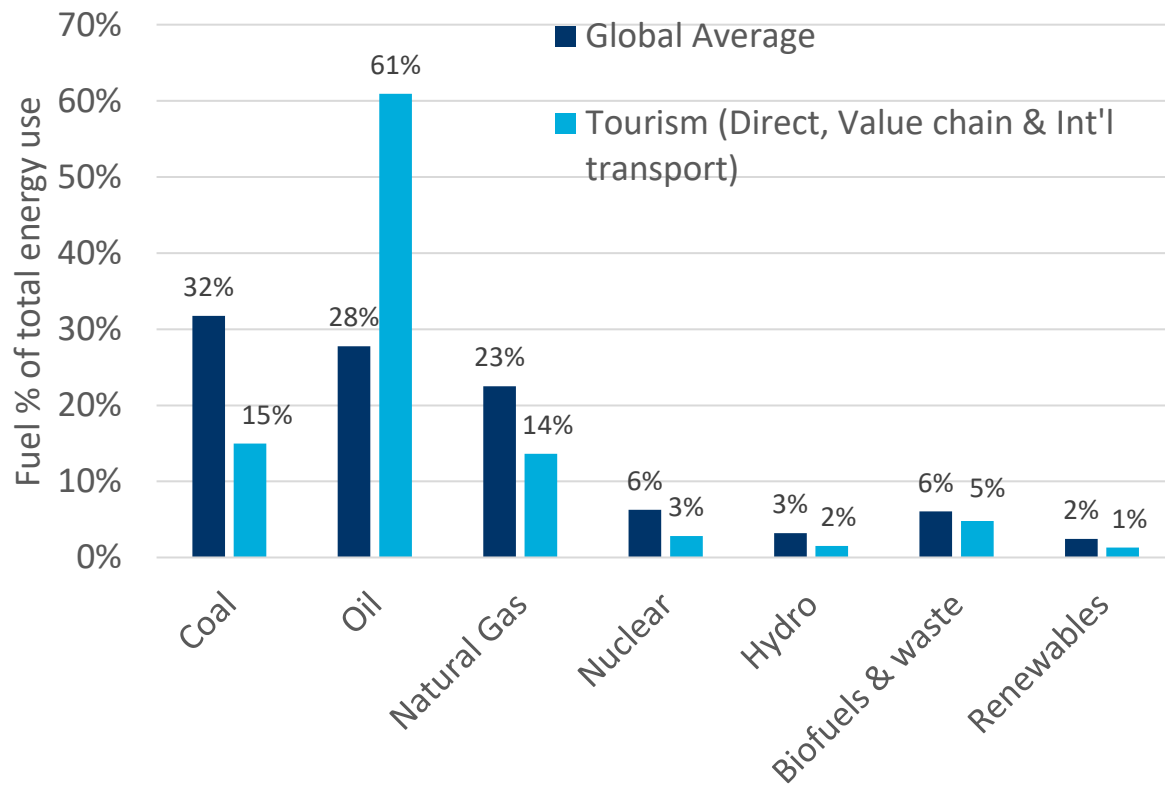
Global T&T GHG Energy Use 2019

**10.6% of total
world energy use**

Data captures both total energy use and composition:

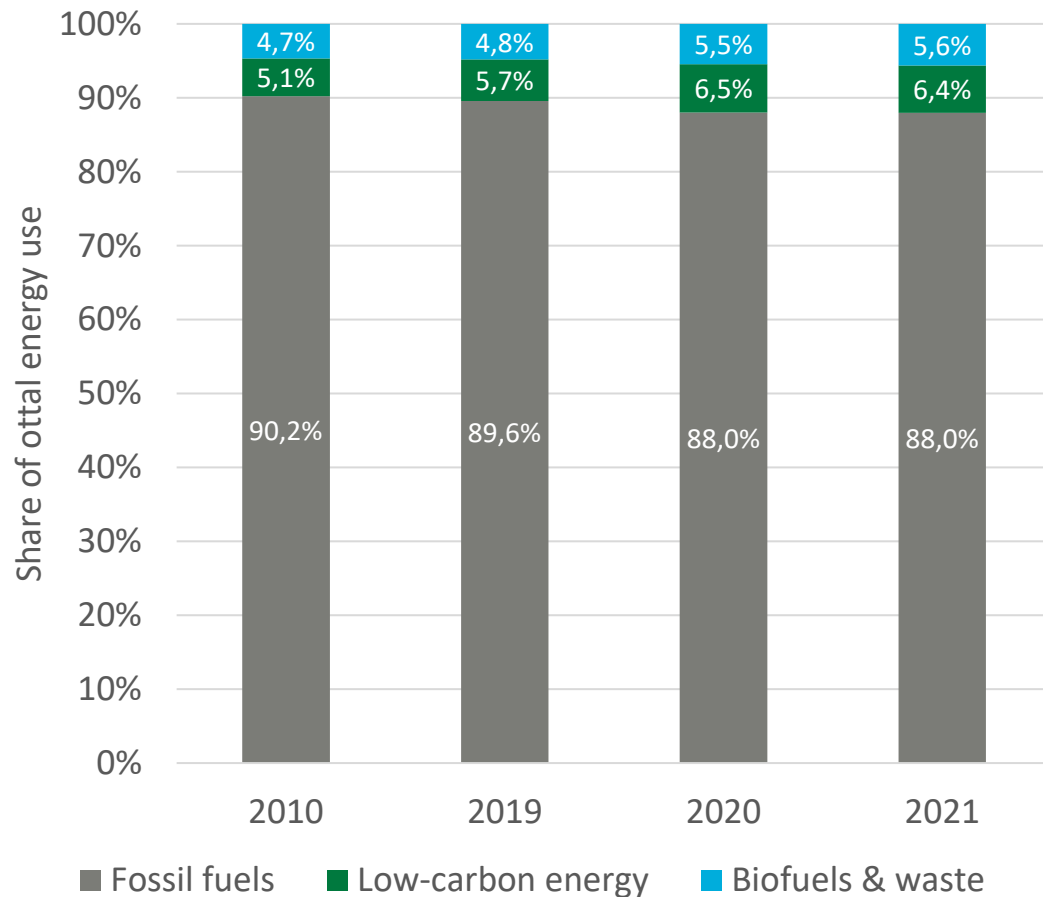
- **Fossil fuels** - coal, oil, and natural gas
- **Low-carbon** - renewables such as solar, wind, wave, and geothermal, as well as traditional hydroelectricity and nuclear.
- **Biofuels and waste**

T&T Energy Composition



- T&T's energy footprint is relatively lower than its GHG footprint due to a lower reliance on coal than the global economy-wide average
- The sector relies primarily on oil due to role of transport
- For electricity-driven activities, the energy mix is determined by the prevailing fuel sources for that country's electricity production

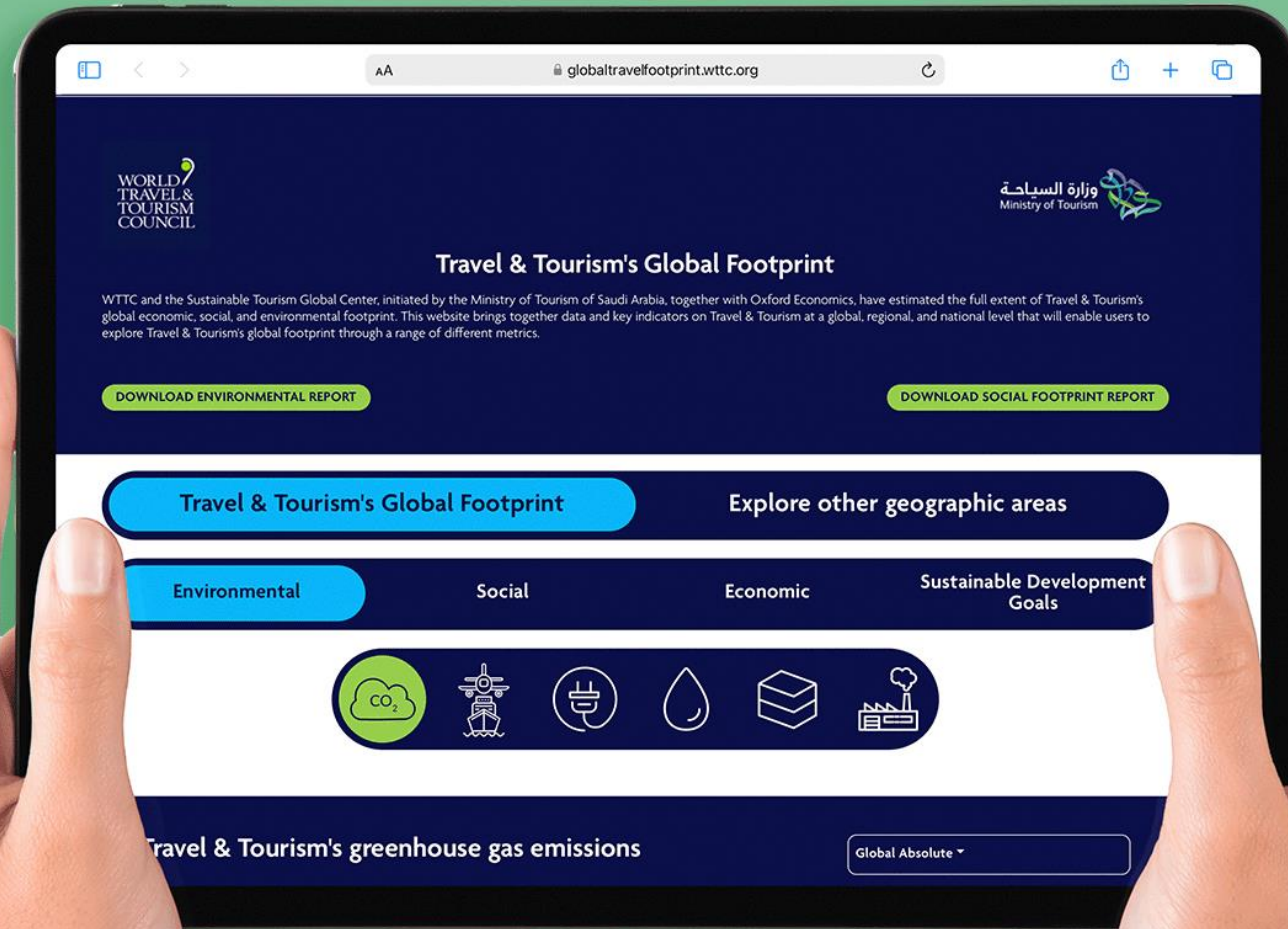
Low-Carbon Energy Use



- Low-carbon energy use grew from 5.1% of overall energy use in 2010 to 6.4% in 2021
- Top 5 increase 2010-2019: Kenya 12.3%, Ecuador 5%, Norway 3.5%, China & Slovakia 2.9%

Low-carbon energy comprises renewables (solar, wind, wave, geothermal), traditional hydroelectricity, and nuclear energy.

globaltravelfootprint.wttc.org



SCAN ME

But how? – Net Zero Roadmap



First Roadmap for sector as a whole (aviation, accommodation, TOs, OTAs, cruise)

Status quo of climate action in sector

Roadblocks and levers for decarbonisation

Sets ambition corridors for types of business (hard to abate, easier to abate, easy to abate)











Call to action to business and government



But how? – Net Zero Roadmap

- ✓ Emissions profiles per industry
 - Accommodation: S1- 8%; S2- 37%; S3- 55%)
- ✓ Key challenges (emissions boundaries, infrastructure and electricity dependence, ownership models)
- ✓ Decarbonisation Roadmap – including key levers

Exhibit 17: Overview of Decarbonisation Levers for Accommodation

Decarbonisation Levers	Medium-term GHG Impact (2035)	Long-term GHG Impact (2050)	Examples
Energy efficiency improvements			<ul style="list-style-type: none"> • Improve building thermal performance • Enhanced building controls • Sustainable hotel design
Operational improvements			<ul style="list-style-type: none"> • Use less heating/cooling, A/C • Fitting energy efficient lighting
Sustainable procurement and sustainable sourcing			<ul style="list-style-type: none"> • Sustainably source food and cotton • Encourage low carbon diets at hotels, reduce meat consumption • Sustainable source building materials and retrofit
Transition to low carbon energy			<ul style="list-style-type: none"> • Purchase or generate renewable energy on-site • Electrification
Reducing waste usage			<ul style="list-style-type: none"> • Reduce landfilled waste intensity • Measure and reduce food waste

Getting started is critical



Hotel
Sustainability
Basics



Need for global **alignment** around fundamental criteria that all hotels should do as bare minimum

An initiative **by** the industry **for** the industry.

12 indicators - Efficiency, Planet and People

Remote desktop verification

+2,500 hotels verified across 73 countries



Green Key





Louvre Hotels
GROUP



Abercrombie & Kent



Jamaica
Hotel & Tourist
Association



PROCOLOMBIA
EXPORTACIONES TURISMO INVERSIÓN MARCA PAÍS



BIOSPHERE

Mauritius



Tourism Authority



Ministerio de Turismo



Ministerio de Turismo
República Dominicana



دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM



Querétaro

WTTC Sustainability guidance & research



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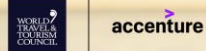
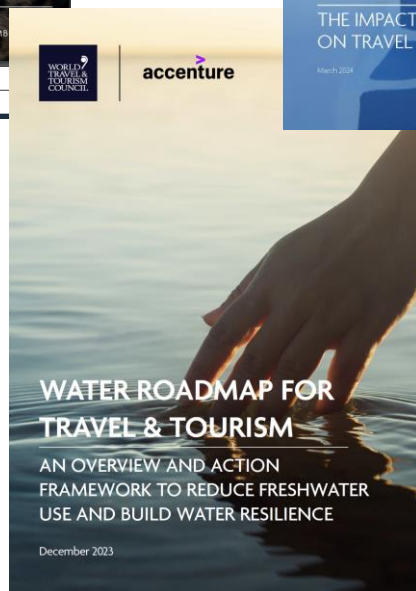


IMPACTS, MANAGEMENT PRACTICES AND RECOMMENDATIONS

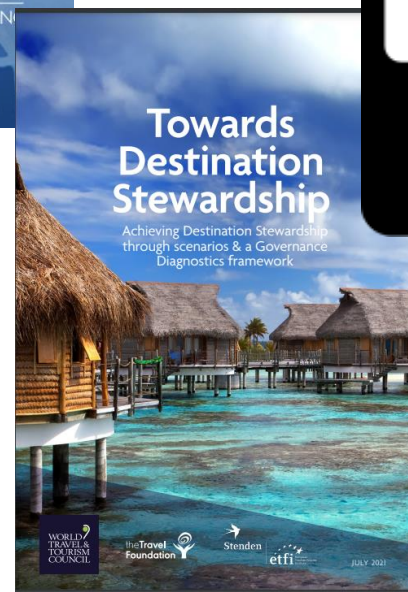


OliverWyman

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WTTC GLOBAL SUMMIT 2024

Perth, Western Australia

8 – 10 October 2024