



WORLD
TRAVEL &
TOURISM
COUNCIL

What's next in travel?

Making net zero the new normal

Ulm, 14th September 2023

Nejc Jus
Head of Research



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170+ Members (CEOs and Chairs) | All geographies | All industries in Travel & Tourism

- Airports
- Airlines
- Cruise
- Destinations
- Tour Operators
- Travel Companies
- OTAs
- GDS
- Car Rental
- Hotels
- Digital Players
- Travel Services



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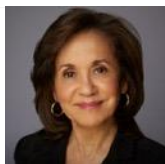
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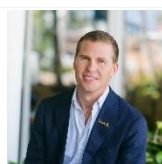
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Matthew Upchurch
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CWT
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CEO



INGLE INTERNATIONAL INC.
Robin Ingle
CEO

Research

For over 30 years we have been quantifying the impact of Travel & Tourism in 185 countries in our annual **Economic Impact Research**.



CITY TRAVEL & TOURISM
ECONOMIC IMPACT



TRAVEL & TOURISM
SECTOR BENCHMARKING



TRAVEL & TOURISM
FOCUS RESEARCH

WHERE NEXT?

WHERE NEXT?

The WORLD is CHANGING:

ECONOMIC
OUTLOOK

GEO- POLITICAL
UNCERTAINTY

ENERGY
CRISIS

CLIMATE
CRISIS



What is the biggest issue facing Travel & Tourism?

**ECONOMIC
OUTLOOK**

**CAPACITY
CONSTRAINTS
& STAFF
SHORTAGES**

**ANOTHER
PANDEMIC**

CLIMATE CRISIS



Global Economic Impact: Key Highlights



GDP

2019

\$10TN

10.4%
of economy

2022

\$7.7TN

+22%
(vs 2021)

2023
Forecast

\$9.5TN

+23.3%



Jobs

334MN

1 in 10
jobs

295.4MN

+21.6MN
(vs 2021)

320MN

+24MN



Visitor Spend

International
\$1.9TN

International
\$1.1TN

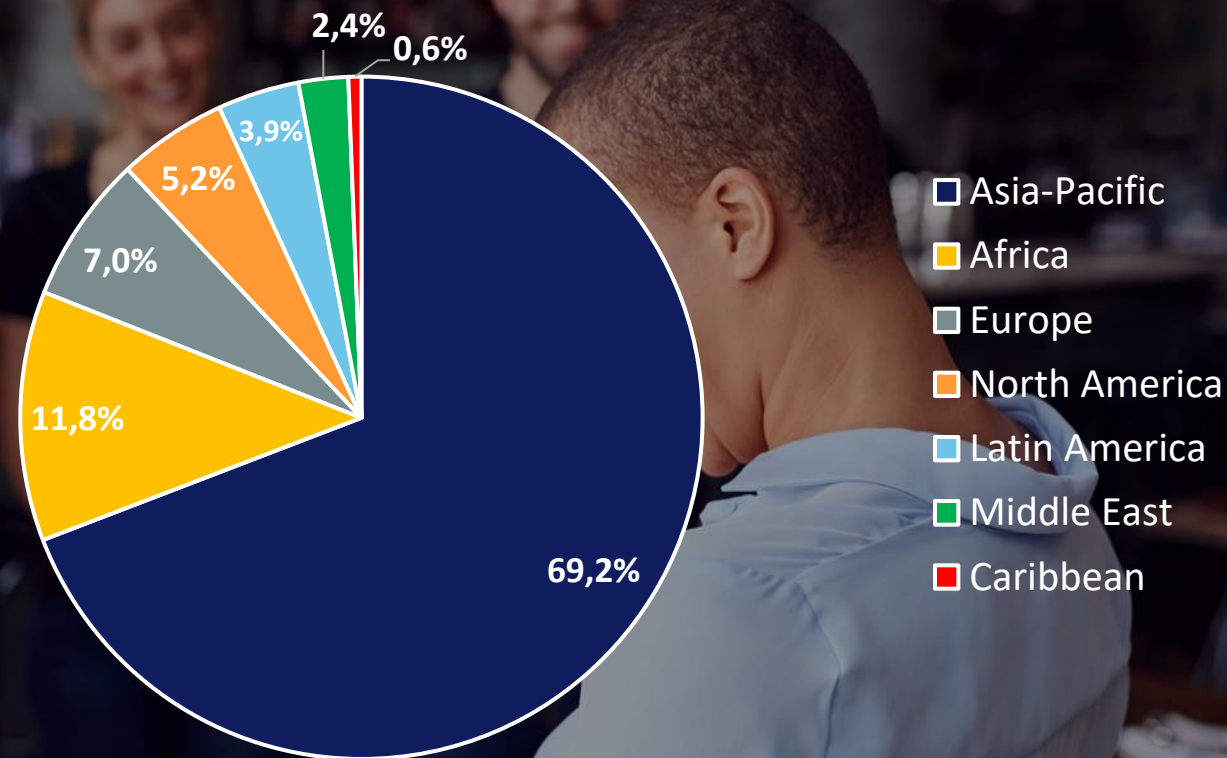
+82%
(vs 2021)

International
\$1.4TN

+23%

Economic Impact Research: Travel & Tourism's Forecasted Job Growth

**Our sector is
forecasted to create
110 million new jobs
across the next
decade**



% of new T&T jobs between 2023 and 2033 - Region

WHERE NEXT?

The PLANET is CHANGING:

An aerial photograph of a construction site. A yellow excavator is positioned on a dirt path next to a blue truck. The site is surrounded by a dense green forest. A semi-transparent blue circle is overlaid on the left side of the image, containing the word 'CHALLENGE' in white capital letters.

CHALLENGE

An aerial photograph of a dense green forest. A semi-transparent green circle is overlaid on the right side of the image, containing the word 'OPPORTUNITY' in white capital letters.

OPPORTUNITY

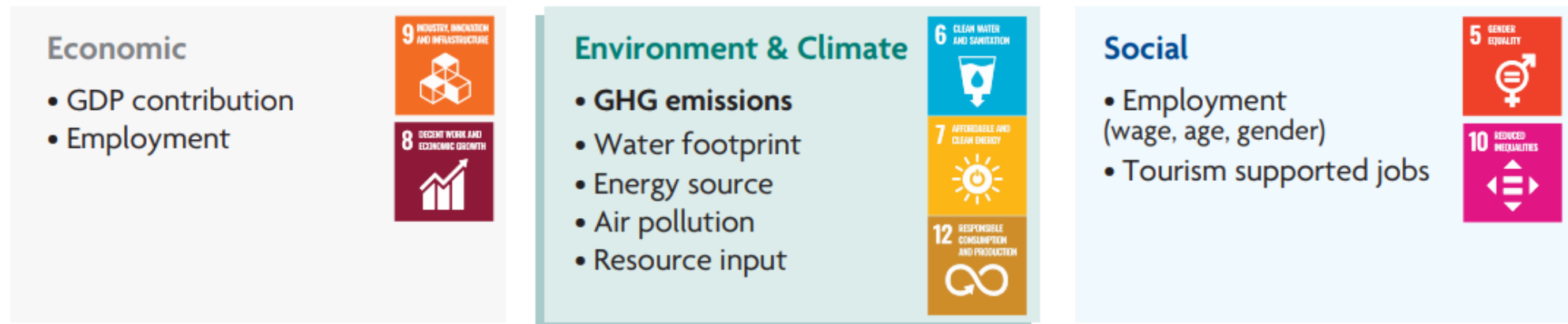
ENVIRONMENTAL & SOCIAL REPORTING

Building on WTTC's Economic Impact Research (EIR), revealing Travel & Tourism's Environmental and Social footprints.

Evidence for sustainability & the sector's progress on the Sustainable Development Goals (SDGs)

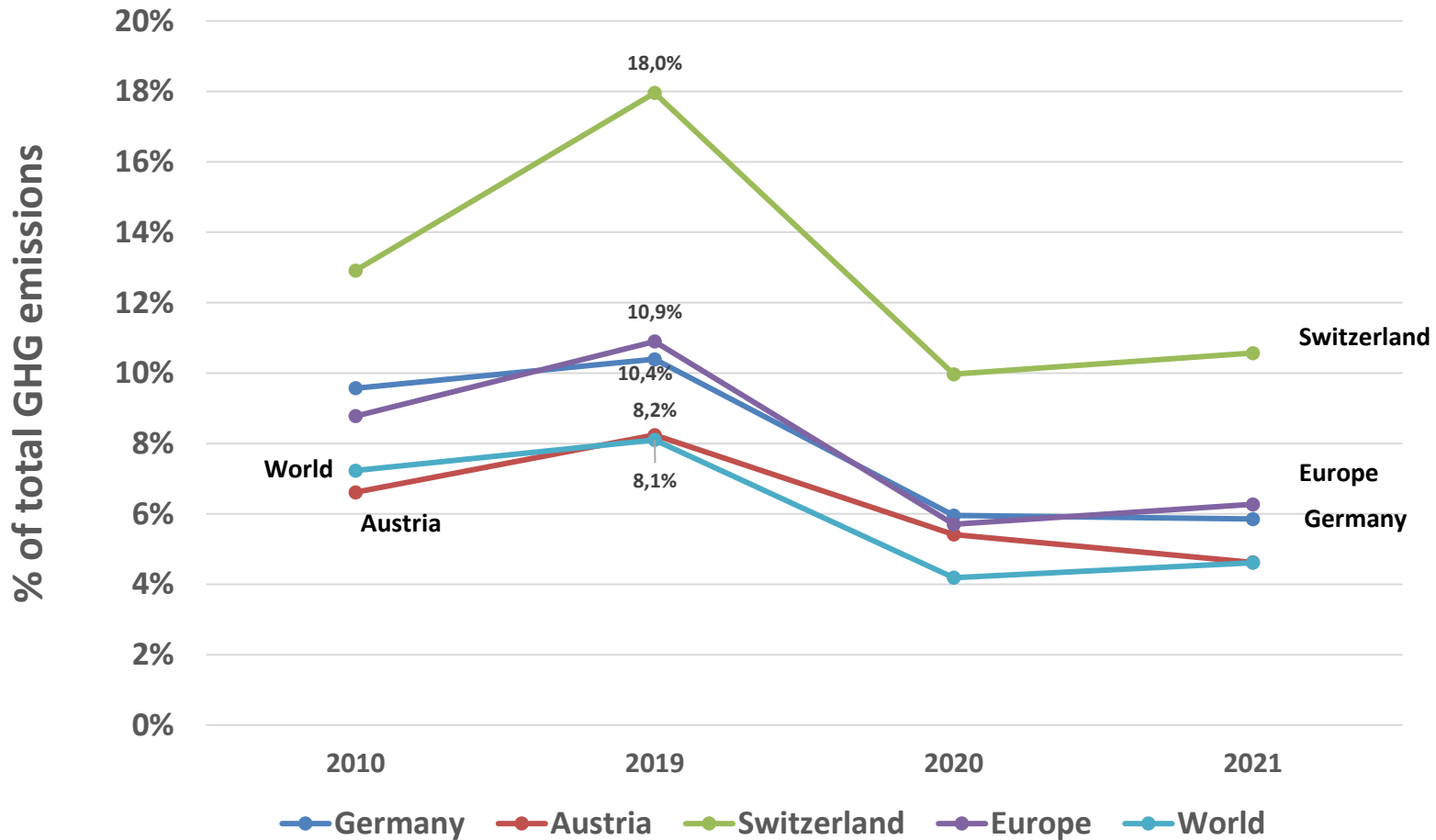
185 countries (global and regional) for 2010, 2019, 2020 and 2021

Economic, social and environmental indicators to help track T&T's contribution to SDGs over time



T&T's CLIMATE FOOTPRINT

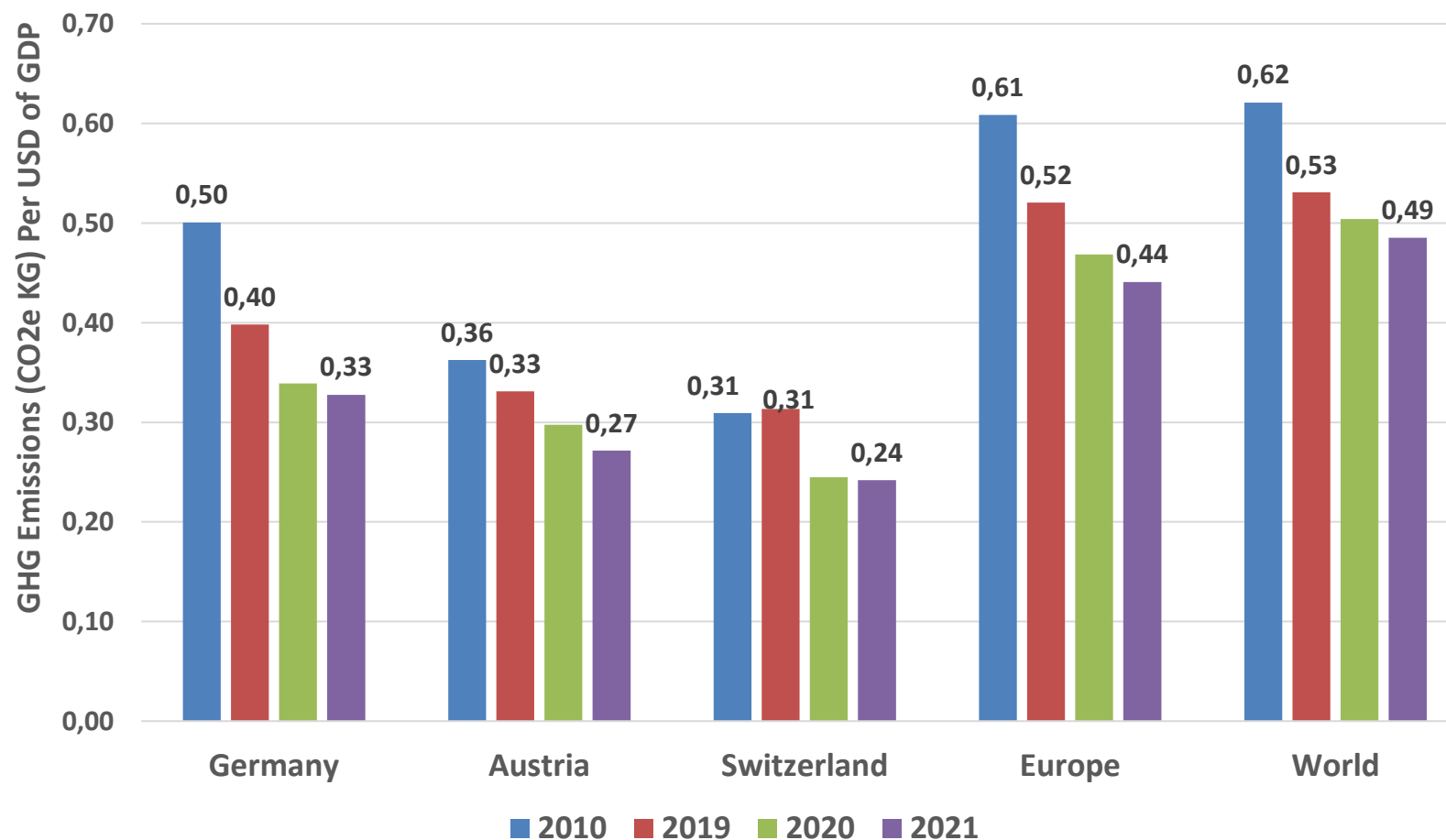
Travel & Tourism's Contribution to Total GHG Emissions



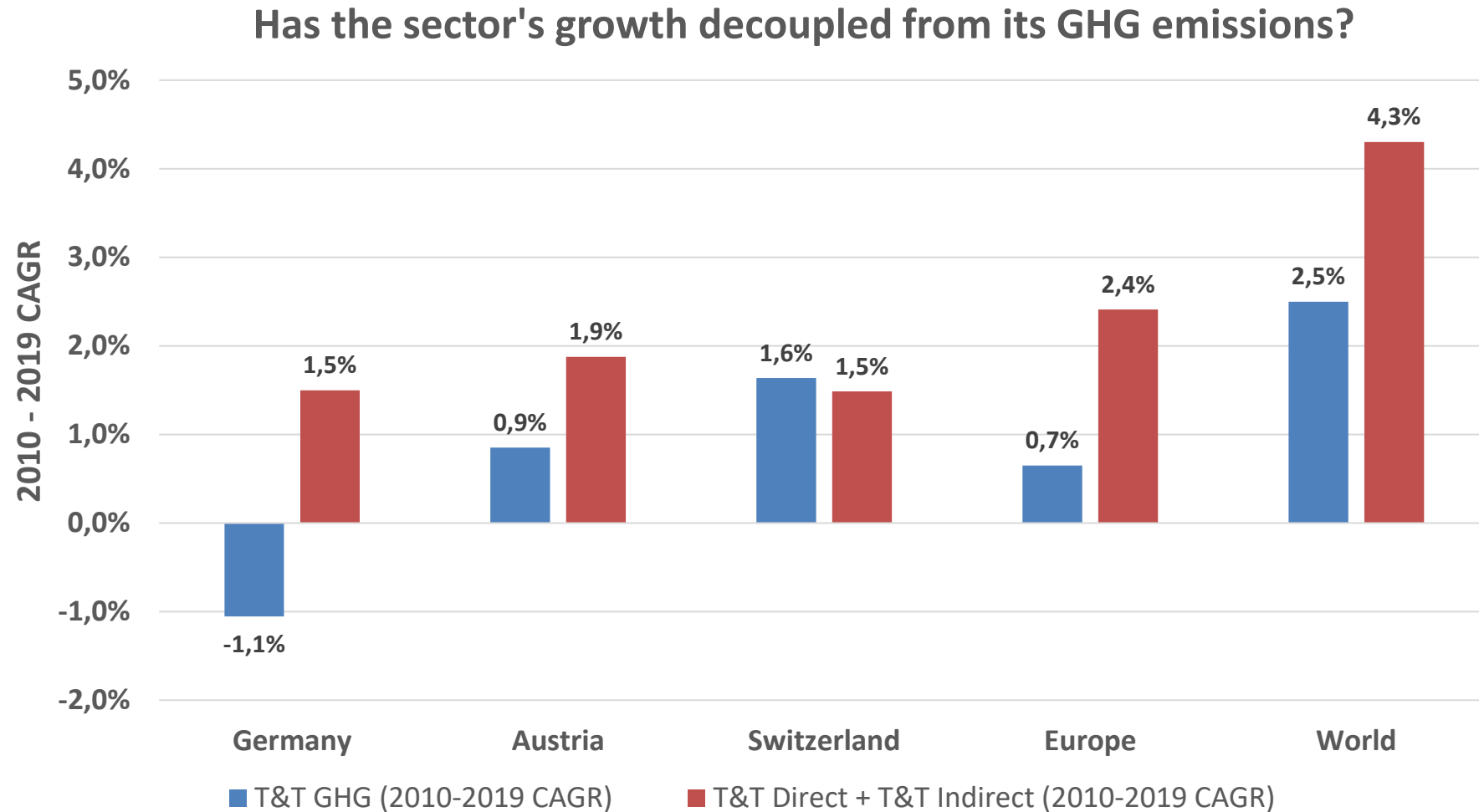
Note: GHG emissions include Scope 1, 2 and 3 plus international transport

EMISSIONS PER UNIT OF GDP

Travel & Tourism's GHG Emissions Intensity

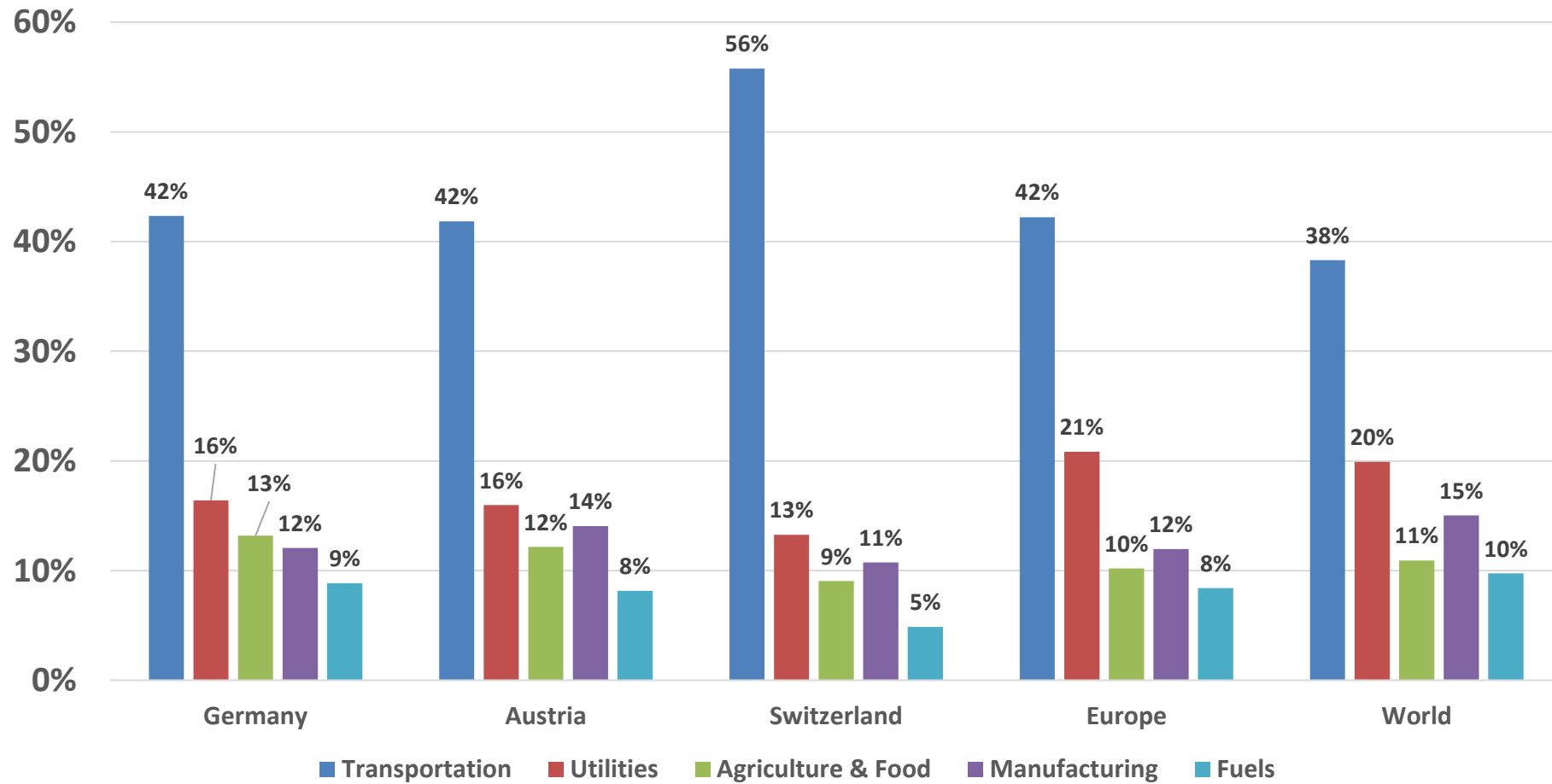


HAS THE SECTOR'S GROWTH DECOUPLED FROM ITS GHG EMISSIONS?



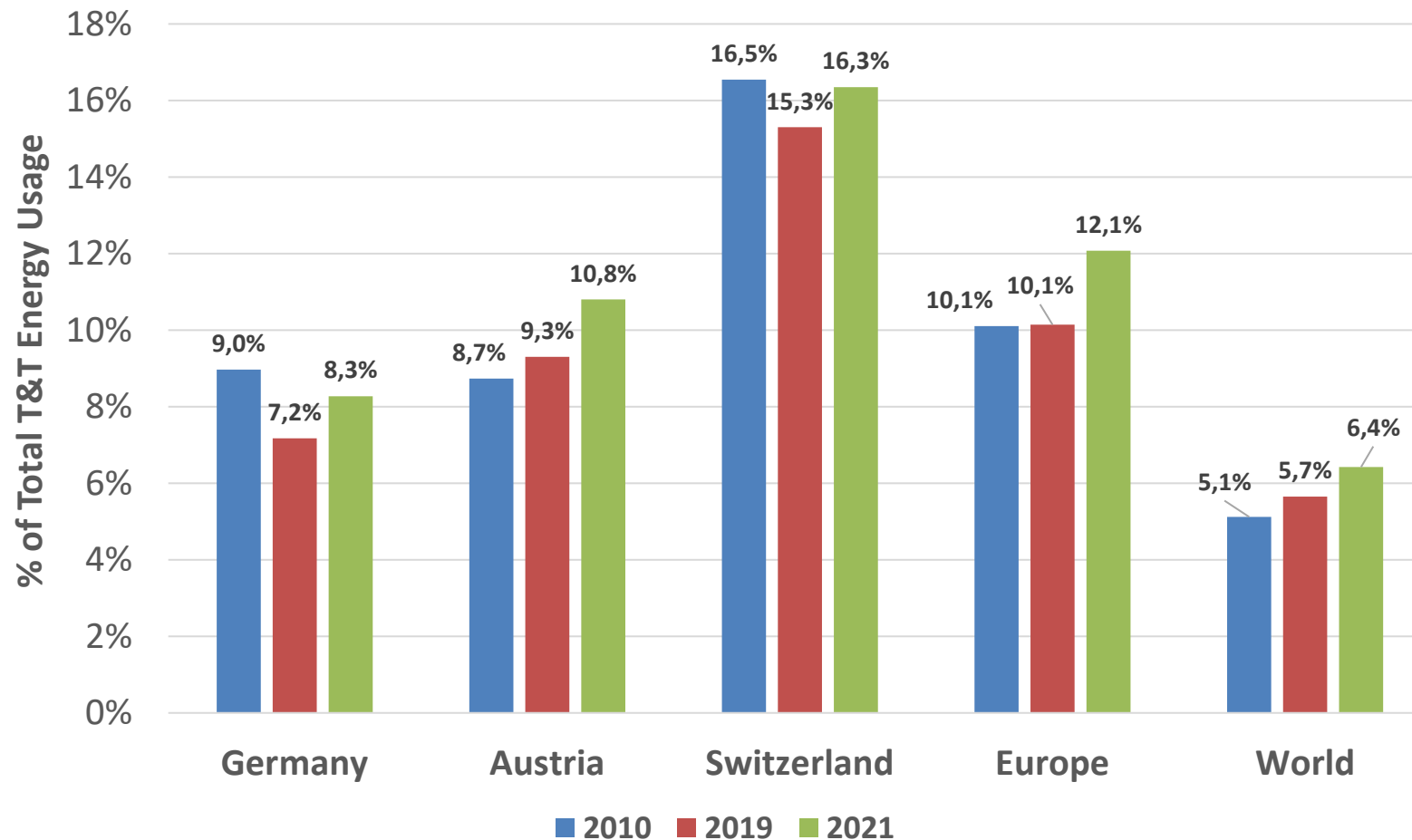
WHERE ARE THE EMISSIONS COMING FROM?

Industries contributing the most to Travel & Tourism GHG emissions in 2019



LOW-CARBON ENERGY USE

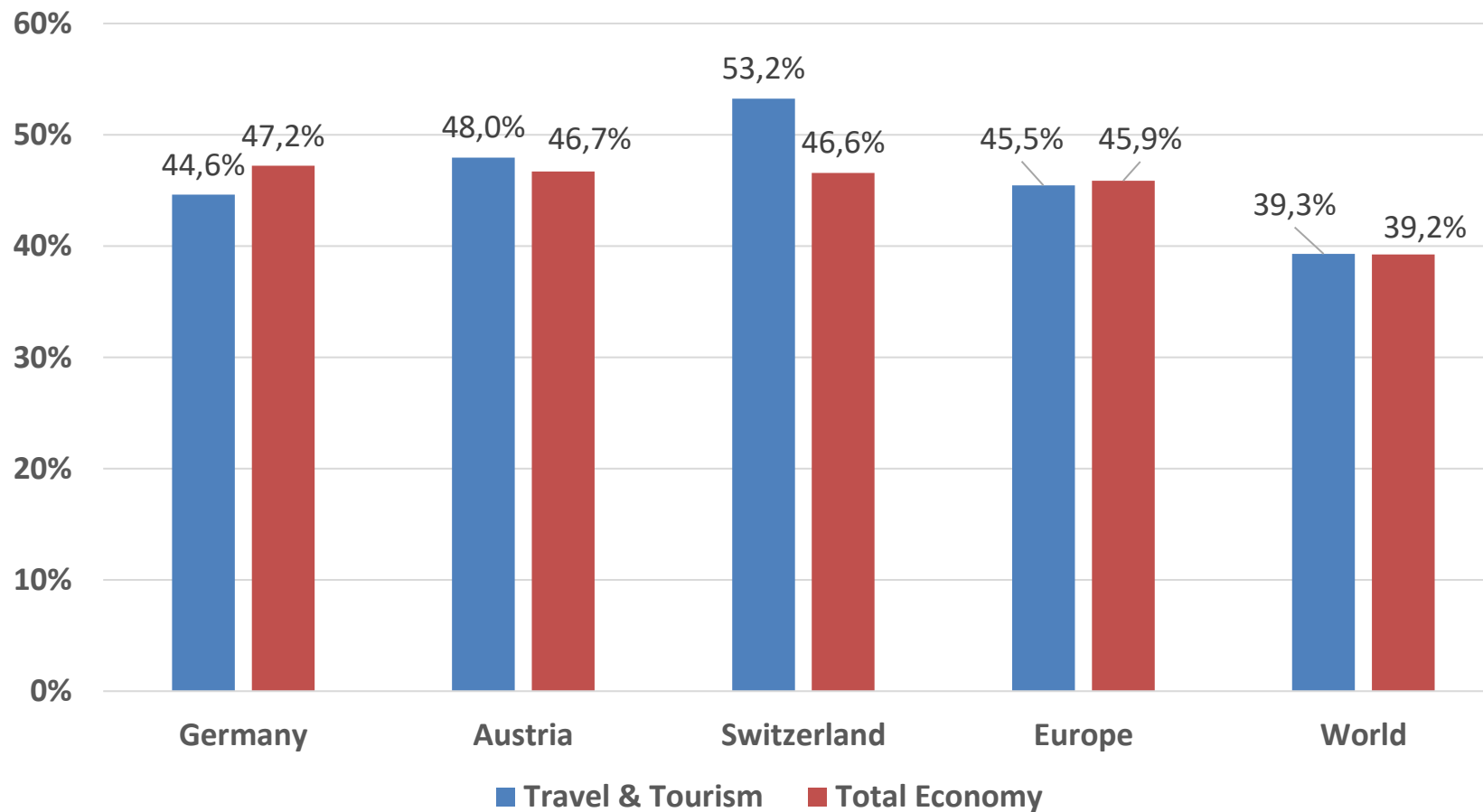
Low-carbon energy usage linked to Travel & Tourism



Note: Low-carbon energy is defined as renewable energy (wind, wave, solar & geothermal) plus hydro and nuclear.

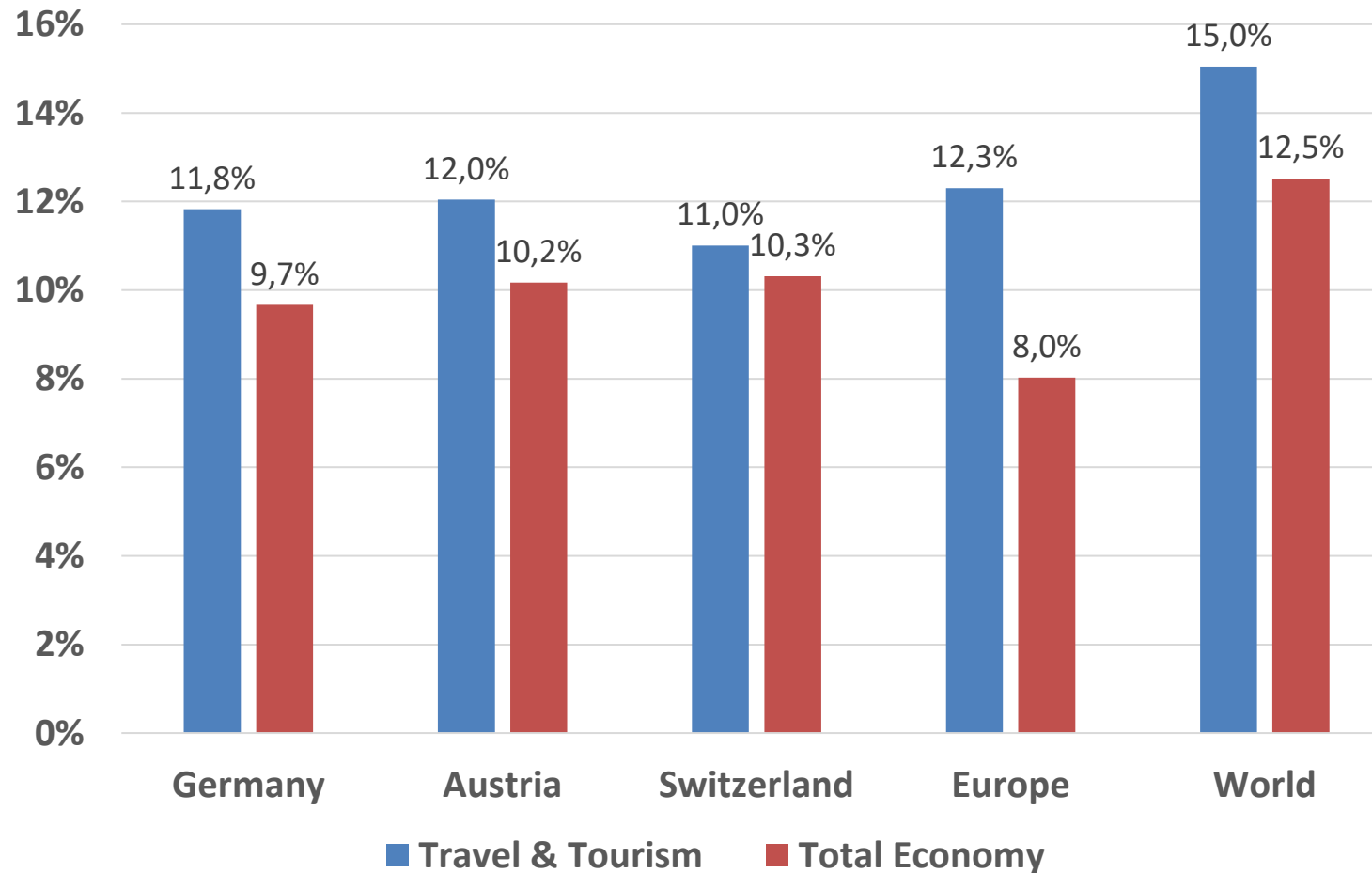
FEMALE EMPLOYMENT

% Share of female workers in 2021 (direct only)



YOUTH EMPLOYMENT

% Share of youth workers in 2021 (direct only)



THE SOLUTION?

SET TARGETS

DELIVER

ENGAGE THE
VALUE CHAIN

WTTC Sustainability Programme

Aim: Preserve the environment and reduce the sector's carbon footprint, while maximising T&T's social impact.

Mandate: Sustainability committee and taskforce

Priorities: Climate (Net Zero), Environment (Circular Economy, Biodiversity & Nature), Social (Stewardship, DEIB)



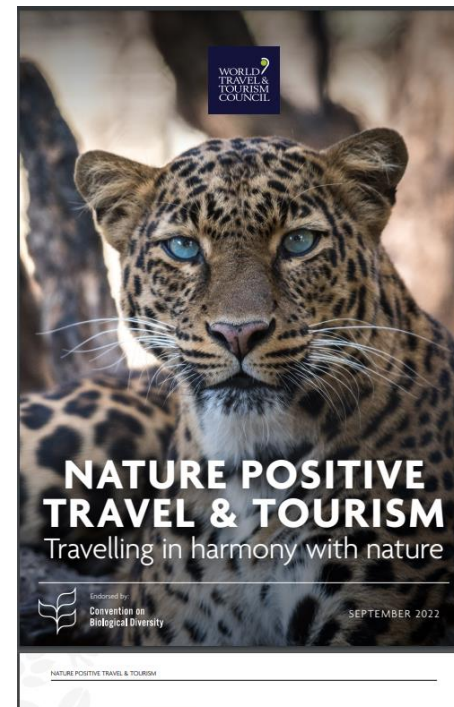
RETHINKING SINGLE-USE PLASTIC PRODUCTS IN TRAVEL & TOURISM

IMPACTS, MANAGEMENT PRACTICES AND RECOMMENDATIONS



A NET ZERO ROADMAP FOR TRAVEL & TOURISM

Proposing a new Target Framework for the Travel & Tourism Sector

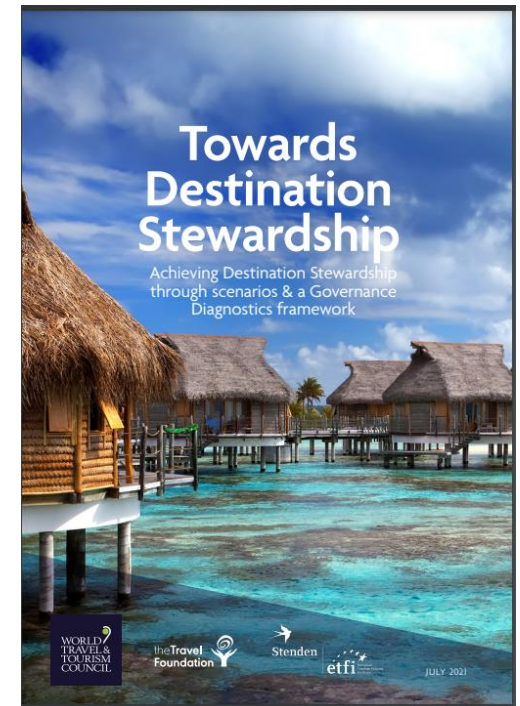


NATURE POSITIVE TRAVEL & TOURISM
Travelling in harmony with nature



SEPTEMBER 2022

NATURE POSITIVE TRAVEL & TOURISM



Towards Destination Stewardship

Achieving Destination Stewardship through scenarios & a Governance Diagnostics framework



Hotel Sustainability Basics

Phase 2: Hotel Verification

An initiative **by the industry for the industry**, it responds to the need for global alignment around fundamental actions and for supporting businesses in taking the first step in their sustainability journey.

12 basic criteria, to be completed within 3 years to then move on to other, more complex and advanced, sustainability frameworks.

Three categories: **Efficiency, Planet and People**.

It is a fully remote, desktop verification, carried out by 2 official verification bodies, with exclusivity for the first year.

SGS



Green Key

60+ hotel brands and industry bodies behind the criteria.

Endorsed by **SHA, GSTC** and **Travalyst**.

Destinations on board: **Azerbaijan Tourism Board, Tourism Authority of Mauritius, ProColombia, Ecuador, Madagascar** and more.

Potential integration into platforms such as **Trip.com, Booking.com, Expedia** and **Airbnb**

Supported by **Radisson Hotel Group, Jin Jiang, Hotelbeds, Virtuoso, Abercrombie & Kent** and many major hotel brands.



Concluding Remarks



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The Voice of Travel & Tourism.

For more details visit www.wttc.org
or contact nejc.jus@wttc.org



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