



# The green dream

*Future Destinations*



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# After this presentation you will know

1

Why does tourism matter?

2

Why do Future Destinations have an impossible equation to solve called “the incompatibility triangle”?

3

How can Future Destinations be sustainable?

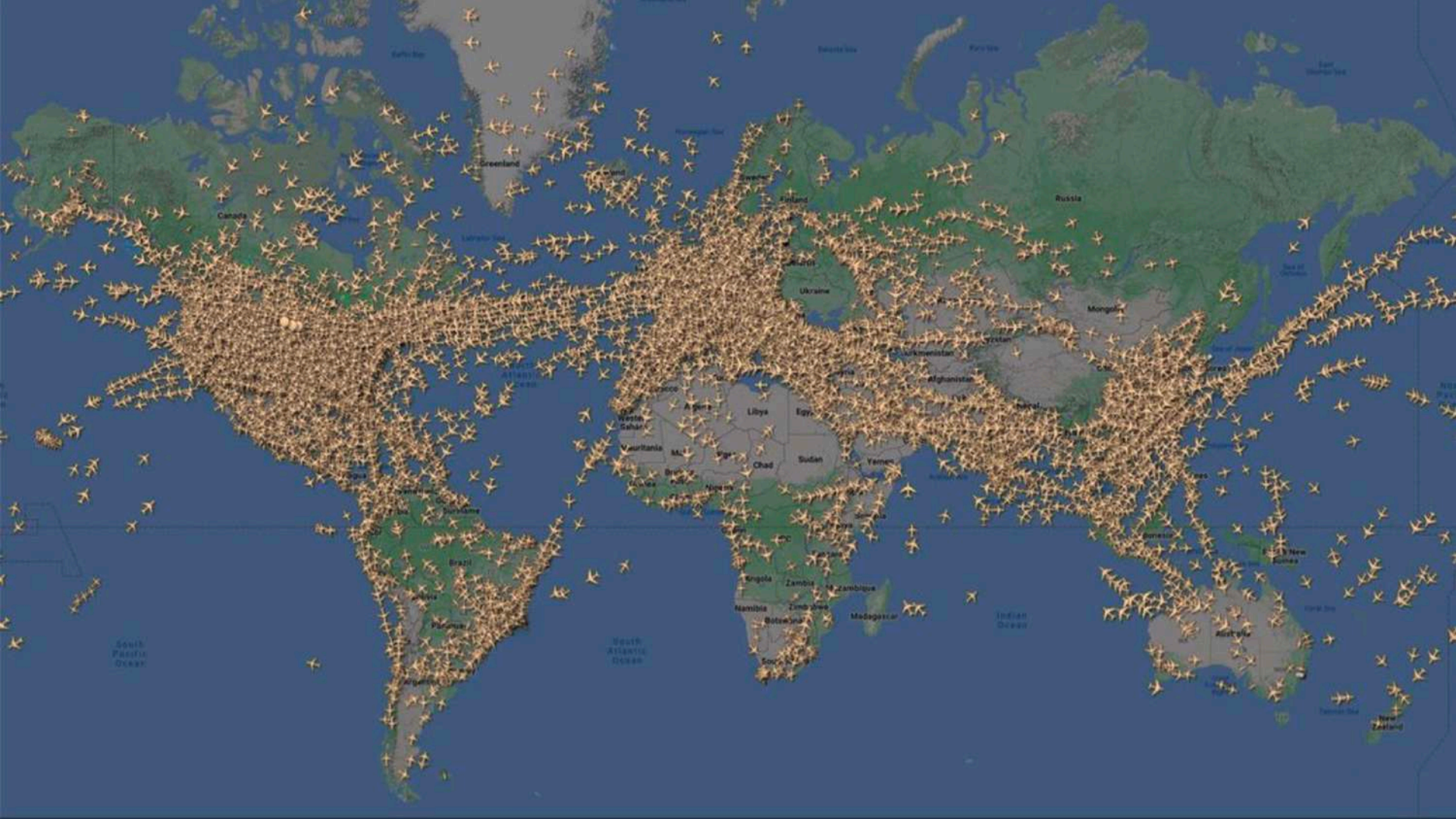
But you will also know...



How **Leonardo Di Caprio**  
destroyed an entire ecosystem with  
this kiss?

# 01 — Tourism matters



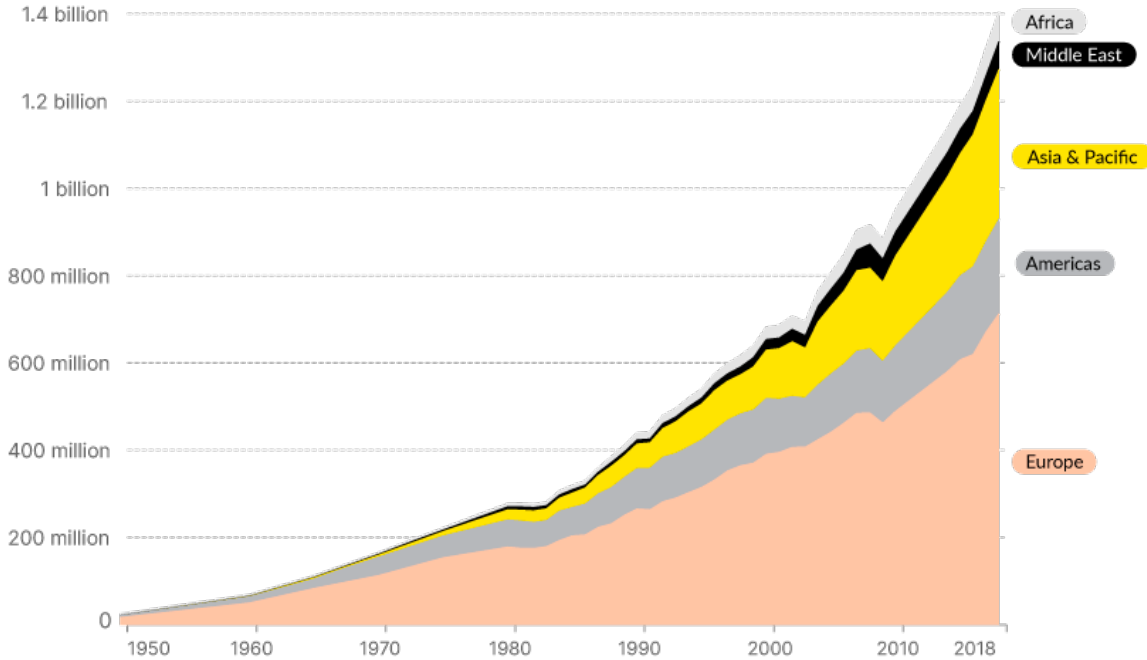


# Tourism & Globalisation are two faces of the same coin

## International tourist trips by destination region

Trips by those who stay overnight and whose main purpose for visiting is not commercial.

Sustainability  
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EY



Source: United Nations World Tourism Organization - World Tourism Barometer (2019)  
OurWorldInData.org/tourism/ - CC BY

# Recovery is on its way

## International tourist trips by activity

Trips by those who stay overnight and whose main purpose for visiting is not commercial.



Source: Statista market insight

# Tourism matters to create (a lot of) jobs



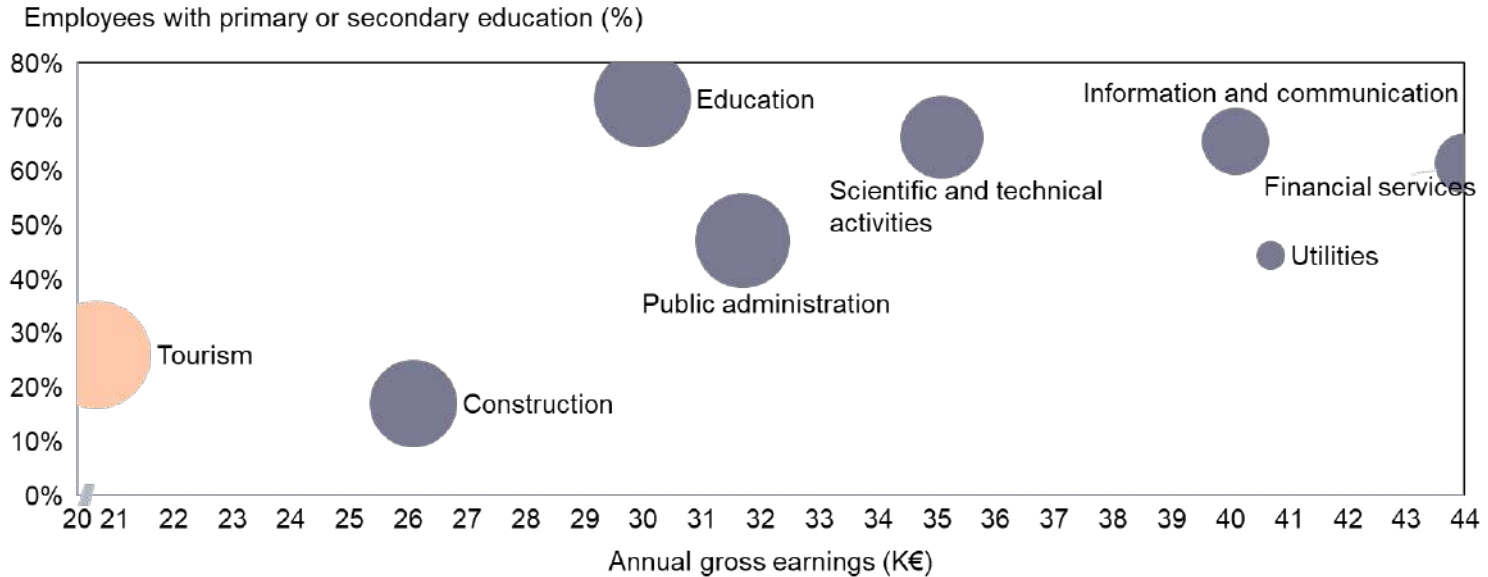
## Tourism and hospitality sector in the EU

- 12.5M jobs
- As much as real estate and construction
- 2 times more than banking and insurance



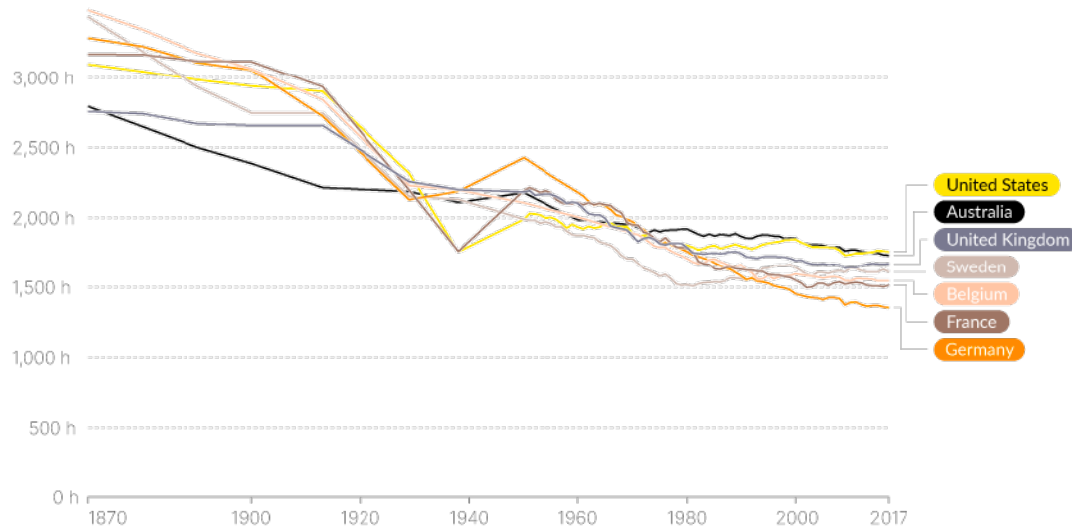
# Tourism provides jobs for all

Jobs with primary or secondary education level in the EU27 in 2019 by sector and average annual earning



# Tourism & leisure have never been more important in our life

## Annual working hours per worker



15% of our life working

25% of our life doing things we have to do

30% of our life sleeping

**30% free time**

Source: Huberman & Minns (2007) and PWT 9.1 (2019) - Note: We plot the data from Huberman & Minns (2007) and extend coverage using an updated vintage of PWT, which uses the same underlying source. Comparisons between countries are limited due to differences in measurement. - OurWorldInData.org/working-hours - CC BY

# 02 — The incompatibility triangle

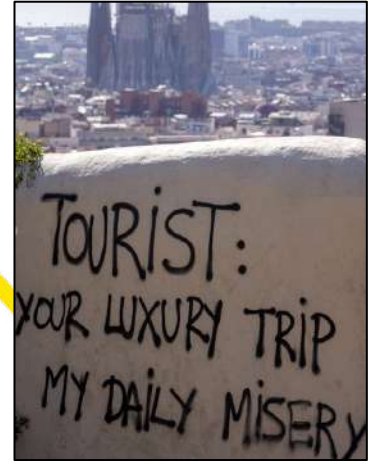


# Koh Phi Phi Leh

Thailand

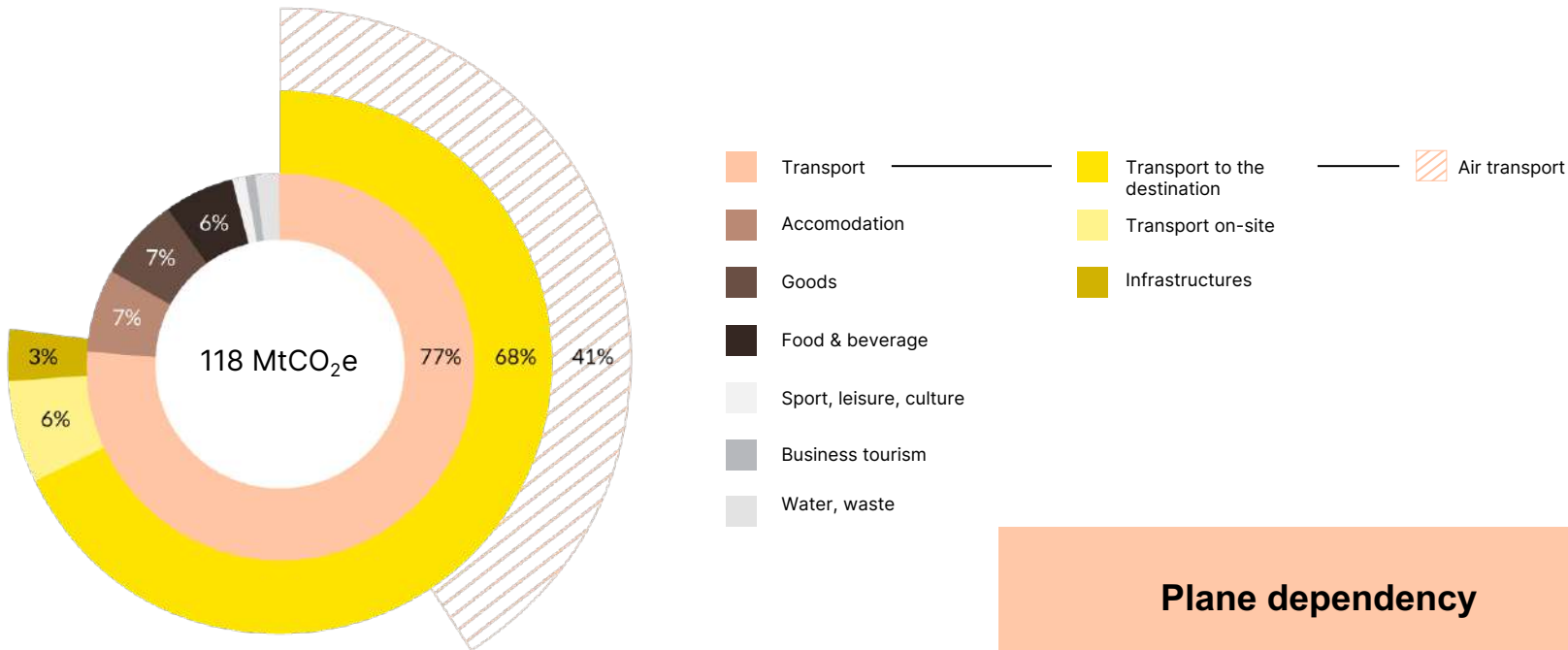


# Overtourism can destroy the attractiveness of a destination



Tourism represents more than 10% of our emissions.  
The main source of emissions is air travel.

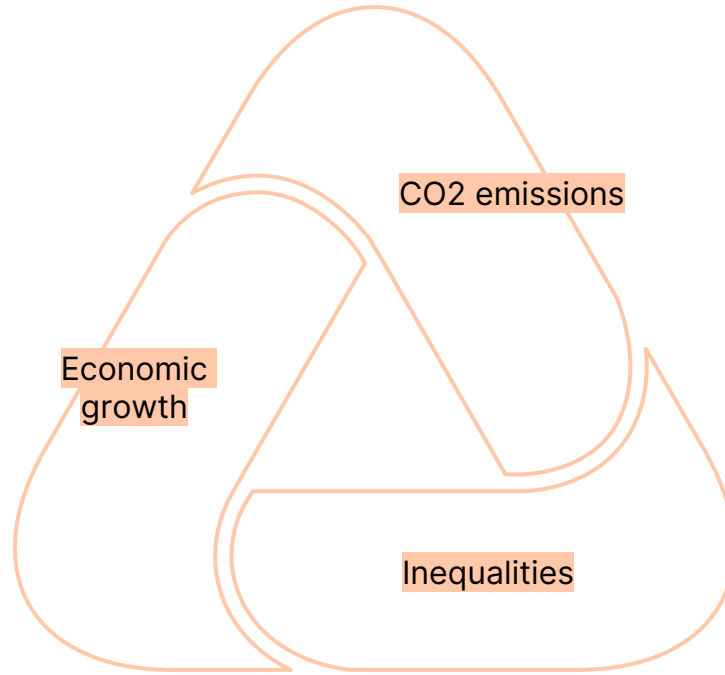
### Focus on the carbon impact of tourism in France



### Plane dependency

30% in France vs 85% in NI

# The incompatibility triangle



# 03 — Future Destinations





# The revolution is on its way

- Tourists
- Tourism & hospitality companies
- Tourism destinations
- Governments

# Tourists - 4 flights per person per life?

## Schiphol airport in Amsterdam limits flights to prevent emissions, in world first

Greta Thunberg gave up flights to fight climate change. Should you?



**Climate Perks: The new sustainability trend that encourages employees to embrace slow travel**

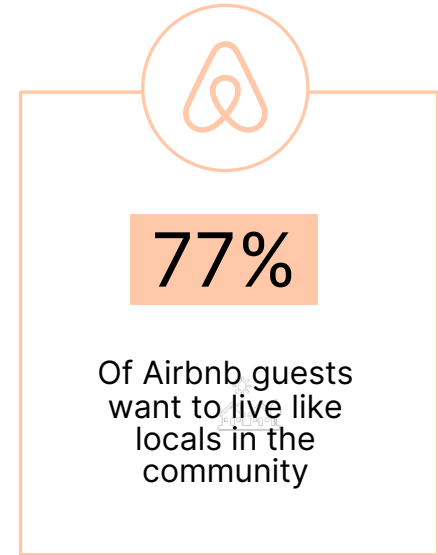
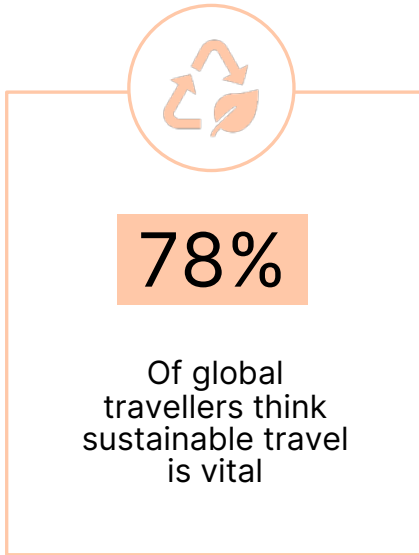
The work perks scheme rewards staff who travel in a slower, greener way with more time off, writes [Lucy Thackray](#)

## A New Version of the Orient Express Train Is Coming to Italy in 2023

Paris - Barcelone • 10 juillet 2023 • 1145 km • 2 pers.

GreenGo	CO <sub>2</sub> e % quota/pers/an	TEMPS	PRIX / pers.
VÉLO	0% 0 kg	62h 59	0 €
TRAIN	0,2% 3,7 kg	7h 21	Non trouvé
BUS <a href="#">Réserver</a>	1,3% 27 kg	15h 46	min : 85 € moy : 124 €
VOITURE ÉLECTRIQUE	2,7% 54 kg	11h 34	87 €
VOITURE THERMIQUE	5,6% 113 kg	10h 04	86 €
AVION	10,8% 216 kg	4h 20	179 €

# Tourists are looking for sustainable and authentic experiences, but are they willing to pay the price?



Tourism companies are already acting...but need support to have a plan in place

**Tourism stakeholders are engaging in climate action, however their actions are not integrated in climate plans**



# Tourism companies embracing a sustainable approach



Sustainable alternatives to rides

*Examples: public transport planning, bike & scooter rental...*



-46% CO2 emissions by 2030

*Examples: Farm-to-table restaurant in Laos, elimination of single-used plastics*



500 new aircraft to its fleet over the next 5 years

*Examples: -17-20% CO2 per seat compared to older models, -50% compared to regional aircraft which are being removed*



10 commitments and 5 renunciations in its strategy

*Examples: 0 net extension of ski areas ; Stop using fossil fuels for its snow groomers. Cease providing technical assistance to ski projects that do not involve a significant natural snow component*



Airbnb experiences to maximise local impact on communities and minimise over tourism



A sustainable alternative to ferries

*Examples: over the last two summers, Sailcoop is bringing tourists to Corsica on a catamaran*

# Destinations - How do we measure success?

	2000's	2010's	2020-2030's
Number of tourists	✓	✓	✓
Number of nights	✓	✓	✓
Average spend per night	✗	✓	✓
Average length of stay	✗	✓	✓
Spend outside the capital city	✗	✗	✓
Spend off-season	✗	✗	✓
CO2 emissions per tourist	✗	✗	✓
ROI on marketing spend	✗	✗	✓
Carbon impact on marketing spend	✗	✗	✓

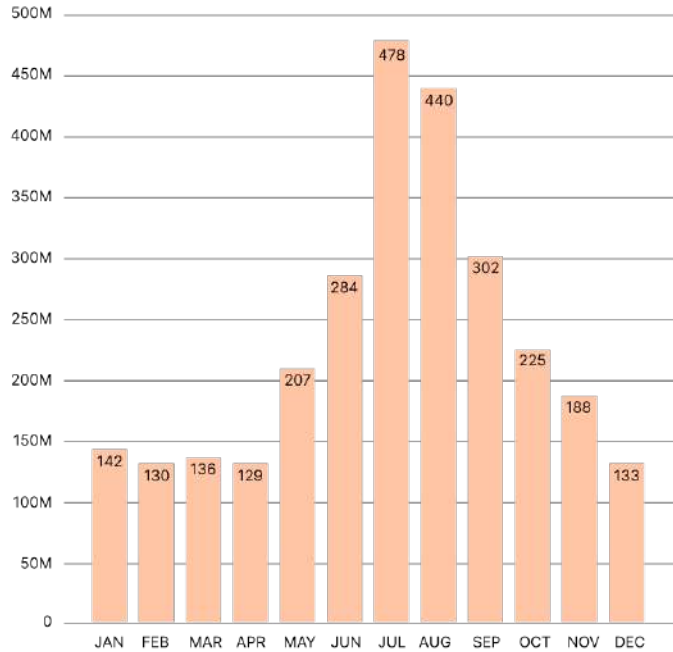
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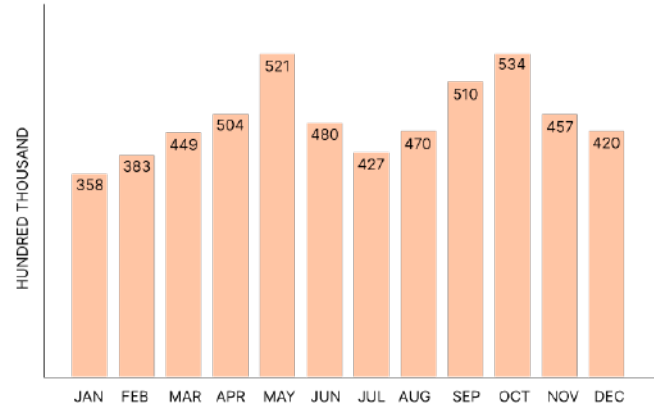
# Destinations - The end of summer holidays?

## Summer in Europe : 50% of revenues



Source: SchengenVisaInfo.com, 2022  
Eurostat data in euro

## Summer in Sevilla : 25% of revenues



Source: Sevilla tourism office, 2018  
Number of nights

# Destinations - Embracing a sustainable approach

## Amsterdam

App to be informed of tourism flows in real time

## the Faroe Islands

App to visit remotely the island with the help of a local



## CITTA' DI VENEZIA

Compulsory reservation of key touristic sites and caps on maximum number of tourists

## ORIENT EXPRESS

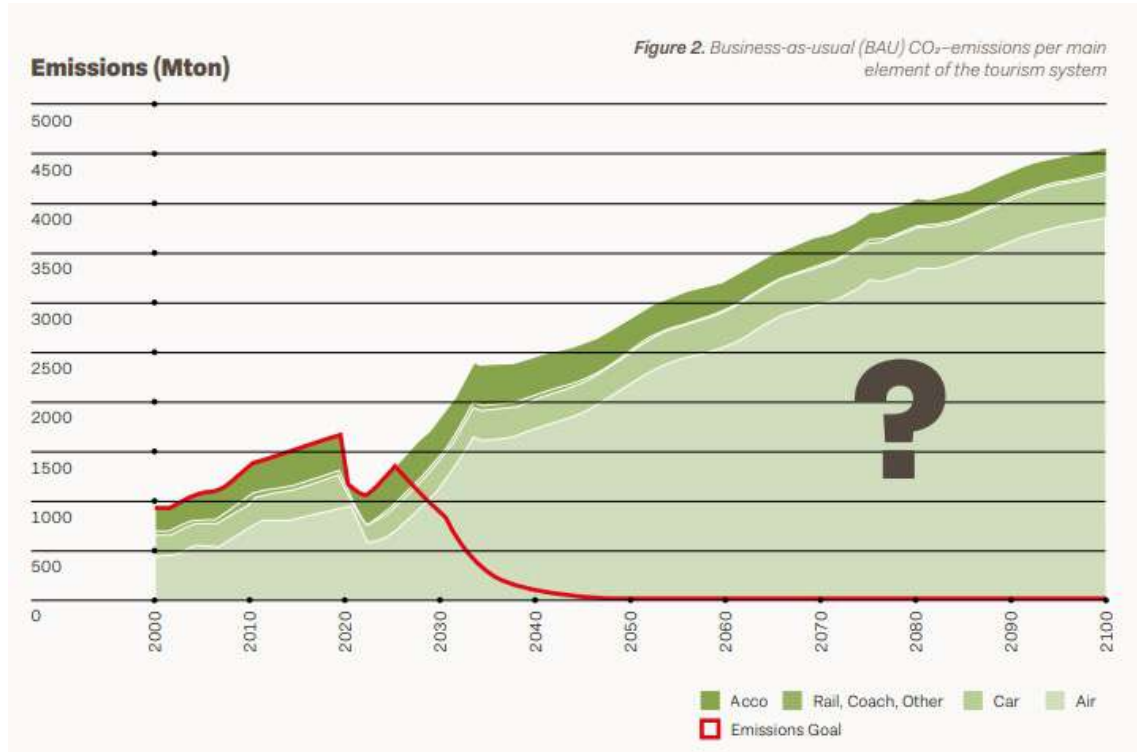
Launch of the Orient Express Brussels - Venice

## EY Clients in Europe

DMOs are starting to prioritise markets based on CO2 impacts per trip and considering closing down local offices outside of Europe



# Governments - Business as usual is not an option



Source: The Travel Foundation, 2023

# Governements - What could be done according to the Travel Foundation

## Measures

Offsetting



Technology



Sustainable aviation fuels



Taxes and subsidies



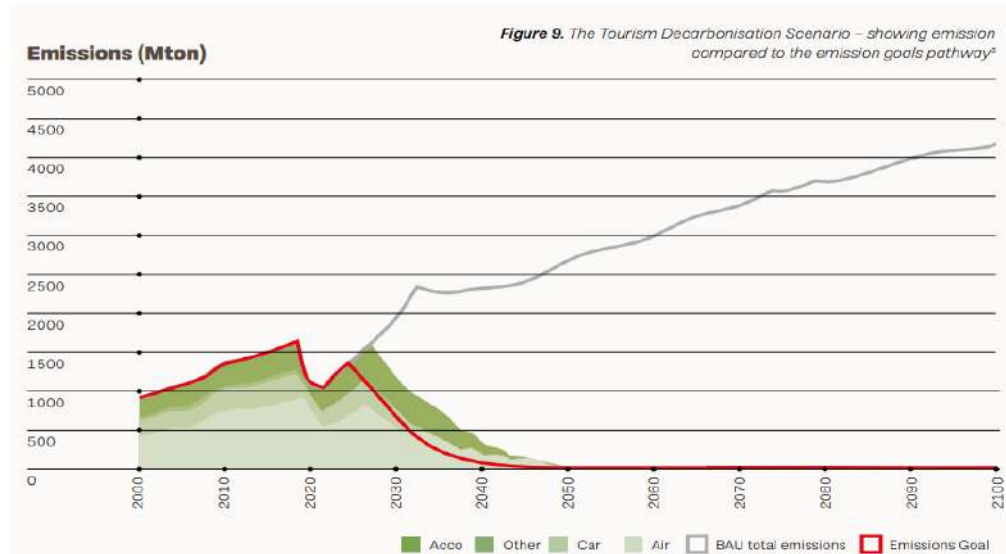
Limit distance travelled



Develop and decrease tax for train



Marketing shift : slower, longer, closer



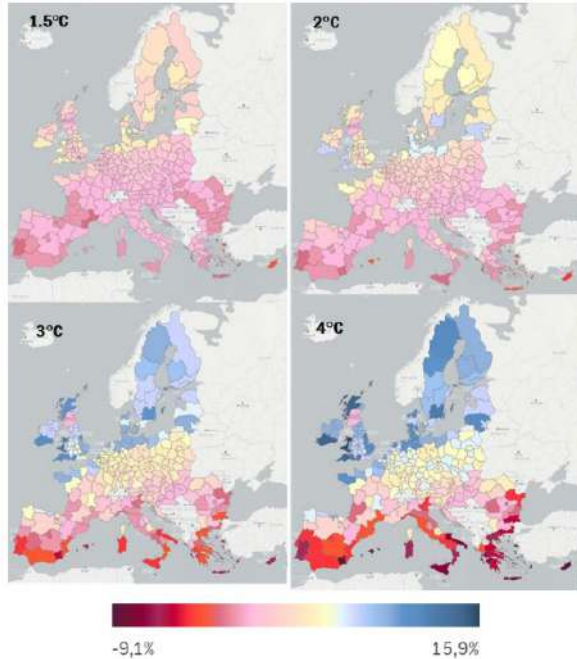
# 04 — Yes we can!



# Conclusion – There is room for optimism!

## Hope for the worse : weather forecasts

Figure 12. Projected evolution of the European regional tourism demand for all the global warming scenarios, compared to the present (2019) in percentage terms.



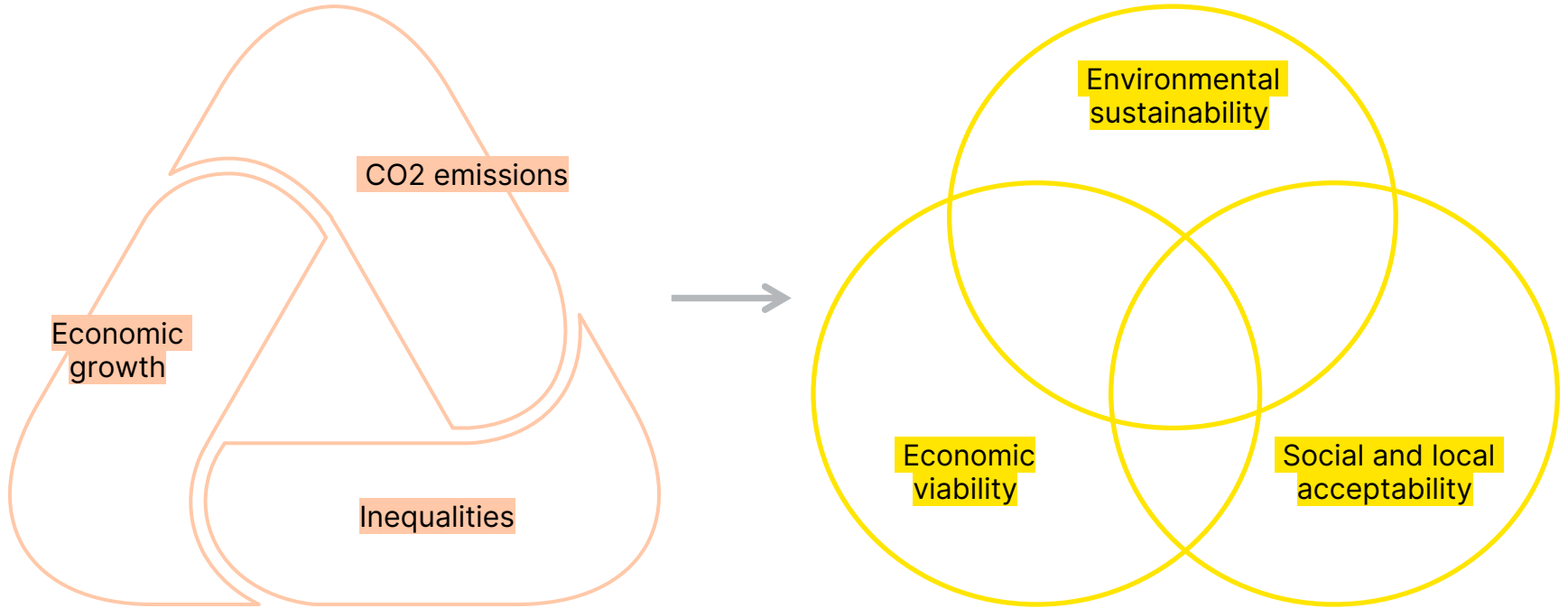
Source: JRC analysis. The values shown refer to the RCP8.5 emission scenario.

## Hope for the best: Swiss Travel Pass

- Unlimited travel by train, bus and boat
- Unlimited use of public transport in more than 90 towns
- Free admission to more than 500 museums
- Mountain excursions included



# Conclusion – Let's end the inaction triangle



Danke  
Thank You

**Merci !**

Grazie

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