

# Travalyst Five-Year Milestone Report

April 2025



 Travalyst

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Travelvst

# Foreword

When I started Travalyst in 2019, I was solving for a global conservation and economic issue. An issue where too often local communities were seeing the damaging effects of increased tourism, rather than feeling the benefits of it. I wanted to harness travel's power to create a more connected and resilient world. A world where people, places, and wildlife all thrive.

Last year saw a staggering 1.4 billion international tourist arrivals globally. That number represents an 11% increase from 2023 levels, and figures are expected to grow again this year. As more people travel, they have huge potential to drive inclusive growth in the destinations they visit.

But they must be empowered with the information they need to make those trips count, ensuring that their travel plans - and spending - contribute to creating thriving ecosystems and prospering communities.

Since 2019, Travalyst has united a \$3 trillion coalition of major travel and technology companies committed to supporting travellers wanting to make better choices. Together, we've placed reliable sustainability information into the hands of millions of travellers worldwide. Flight emissions estimates now appear in over 130 billion searches, and millions of data points on sustainability help travellers make informed accommodation choices.

We've elevated sustainability conversations globally, demonstrating the critical role the travel industry must play in achieving global targets - from emissions reduction to biodiversity protection. As founding signatories of the Glasgow Declaration for Climate Action in Tourism and participants in forums like COP29, we are helping shape solutions at the systems level for the biggest challenges facing our industry.

Building on these global efforts, we will keep engaging with destinations and local businesses to support their sustainability journeys, recognising that tourism's impact is felt by communities and ecosystems long after travellers depart.

With five years remaining until the deadline for the Sustainable Development Goals - the global blueprint for creating a just and sustainable world - the evidence shows we're significantly off track. That's why Travalyst publishes its own Climate Action Plan with progress reported annually.

The world's climate is changing in measurable, costly ways that reach beyond economic concerns. One million plant and animal species face extinction, which has a direct impact on our global health, while extreme weather continues to devastate communities globally, adding to our collective mental health crisis. Despite these challenges, we remain steadfastly committed to our founding vision and mission.

This report has been created with that commitment in mind, highlighting the brilliant progress we have made in transforming travel's potential into tangible action. We outline Travalyst's unique role in this critical phase and, drawing on insights from our highly experienced team, partners, and Independent Advisory Group, highlight where we believe the sector is heading, and what needs to happen to ensure we can save ourselves, from ourselves.

We also call on the industry to align behind a set of three core goals focused on climate, nature, and communities:

- ★ **Climate:** Reducing our carbon emissions by 50% by 2030.<sup>1</sup>
- ★ **Nature:** Protecting and restoring at least 30% of the planet, land, and sea by 2030.<sup>2</sup>
- ★ **Communities:** Promoting truly sustainable tourism that enables a just transition of inclusive economic benefits, reduced inequality, and which preserves local culture and fragile ecosystems.<sup>3</sup>

The road ahead is challenging but I am inspired by our incredible network of collaborators and what we've managed to achieve together already, along with the energy our community continues to bring to the challenges we collectively face.

Please join us!



Prince Harry, Duke of Sussex  
Founder



# Introduction

We are at a critical moment, not only for the travel and tourism industry but also for our planet. Damage to our climate and environment is taking a major toll on both lives and livelihoods. Pollution alone is responsible for one in six deaths worldwide each year.<sup>4</sup> And the destruction of our natural world costs a staggering \$5 trillion annually; that's equivalent to \$625 coming out of the pocket of every single person alive.<sup>5</sup>

The moral and economic imperative to protect our environment has never been stronger, and the travel and tourism industry has a significant role to play.

The industry is responsible for 8.8% of global greenhouse gas emissions. Its future is also heavily reliant on the health of our planet; over 80% of the value of travel and tourism goods and services is highly dependent on nature.<sup>6</sup>

The vast majority of people are aware of the impact travel has and want to know how they can continue to explore the world in ways that don't destroy the environment.<sup>7</sup>

We have an opportunity to rise to this moment and demonstrate what it looks like when an entire industry joins together to do things differently. When done well, travel has the potential to catalyse conservation efforts, create and support tens of millions of jobs by fueling economic growth, and respond to communities' cry for more sustainable tourism.<sup>8</sup>

To realise this potential, we urgently need to close the gap between travellers' *desire* to be more sustainable and the *action* they take. In order to facilitate this action, it is critical that travellers can easily access information they can trust – on the travel booking platforms they use every day.

That's where Travalyst comes in. Since our founding, we have brought together some of the world's biggest travel and technology companies to deliver consistent, credible, and compliant sustainability information at scale. By getting this information into the hands of travellers, corporations, and policymakers, Travalyst can empower everyone to make choices that benefit both people and the planet.

Over the next five years, our work will continue to scale. We will expand and future-proof our existing efforts, roll out new and impactful initiatives, and support the industry to align with incoming regulations. This report outlines our plans – and the impact we aim to achieve.

In this report you'll find:

- \* **The pulse of the industry:** See insights from both travellers and industry leaders, based on new research we carried out for this report. →
- \* **What we do:** Learn more about how Travalyst is working to change the way the world travels – for good – and how we empower action from travellers, travel companies, and policymakers. →
- \* **How far we've come:** Explore what we have achieved so far and the role we have played within broader global conversations. →

- \* **What's next:** Find out where the industry is heading over the next five years, and the unique role we believe Travalyst can play. →
- \* **The actions you can take:** Whether you work within the industry, set policies and regulations, or simply want to travel more sustainably, see how you can be part of the journey. →

Convening the travel industry and facilitating action at scale is central to Travalyst's mission, and we wouldn't be where we are today without our dedicated partners. The successes we highlight in this report are based fully on a collective effort, and are indicative of what the industry can achieve over the years ahead if we collaborate like never before.

There is so much we can do when we work together.



Sally Davey  
Chief Executive



# The pulse of the industry

# Traveller Insights

## People want to travel more sustainably.

We know from our partners' research that travellers care about sustainability.

# 83%

of travellers say that sustainable travel is important to them.<sup>9</sup>



However, that desire is not yet leading to action at the level we need to drive impact at scale.

Of those who have travel plans for 2025



considered accommodation providers' sustainability efforts.<sup>10</sup>

But only



factored this into their decisions.<sup>11</sup>



People are also aware of the potential impact of extreme weather on their travel – an issue that is likely to get worse in the years ahead.<sup>12</sup>

Of those who have travel plans for 2025, nearly



considered extreme weather events such as flooding, droughts, wildfires, and heatwaves when making plans.<sup>13</sup>



And they want governments to require transparency from travel and tourism companies about their environmental impact.

A majority of respondents in both the UK and the US support legislation that requires travel and tourism companies to report on their environmental impact.<sup>14</sup>



\* 28% \*\* 49%

# Industry Insights

The industry is committed to action, despite a challenging context.

More than

## 9 in 10

travel industry leaders we surveyed agree that governments should ensure that travel and tourism companies report on their sustainability and environmental impact.<sup>15</sup>

And more than

## 7 in 10

say that the recent backlash against environmental, social, and governance (ESG) efforts in some countries have had no impact on sustainability efforts within their organisation.<sup>16</sup>

But it needs support.

Only

## 3 in 10

feel very well-equipped to deal with incoming sustainability regulations.<sup>17</sup>

And

## 6 in 10

say that their company's ability to offer a more sustainable product or service depends on the level of demand from consumers.<sup>18</sup>

## Methodology

We have drawn from several data sources for these insights. This includes surveys and studies carried out by third parties (see footnotes), questions commissioned by Travalyst in surveys carried out by YouGov, and an online survey created by Travalyst and distributed directly to our network within the travel industry.

### YouGov data

For UK data, all figures, unless otherwise stated, are from YouGov Plc. The total sample size was 2,288 adults, and the fieldwork was undertaken between 27th - 28th February 2025. The survey was carried out online. The figures have been weighted and are representative of all UK adults (aged 18+).

For US data, all figures, unless otherwise stated, are from YouGov Plc. The total sample size was 1,357 adults, and the fieldwork was undertaken between 28th February - 1st March 2025. The survey was carried out online. The figures have been weighted and are representative of all US adults (aged 18+).

Where the insights reference "those who have travel plans for 2025," please note that the data has been rebased to exclude those who said that they do not have any travel plans. This reduced the sample size to 1,375 in the UK and 641 in the US.

### Travalyst data

The data included in this section is drawn from an online survey created by Travalyst and distributed to our network via email. Responses have been rebased to only include those who work within the private sector. The total number of responses that met these criteria was 138. Some additional insights from this survey are referenced elsewhere in this report.

# What we do



Travalyst is an independent not-for-profit entity working to change the way the world travels – for good.

We mobilise the travel industry to distribute trusted sustainability information at scale, empowering action by three critical groups: travellers, travel companies, and policymakers.

### Travellers

We ensure that travellers have access to consistent information about the sustainability of their travel options – directly on booking platforms – so they can make more informed choices.

### Travel companies

We advance collaboration across the industry, including by mobilising travel companies to collect and distribute consistent, credible, and compliant sustainability data.

### Policymakers

We engage with policymakers globally to help ensure that sustainability-focused policies and regulations have their intended impact.



# To date, we have focused on two key segments of the travel industry

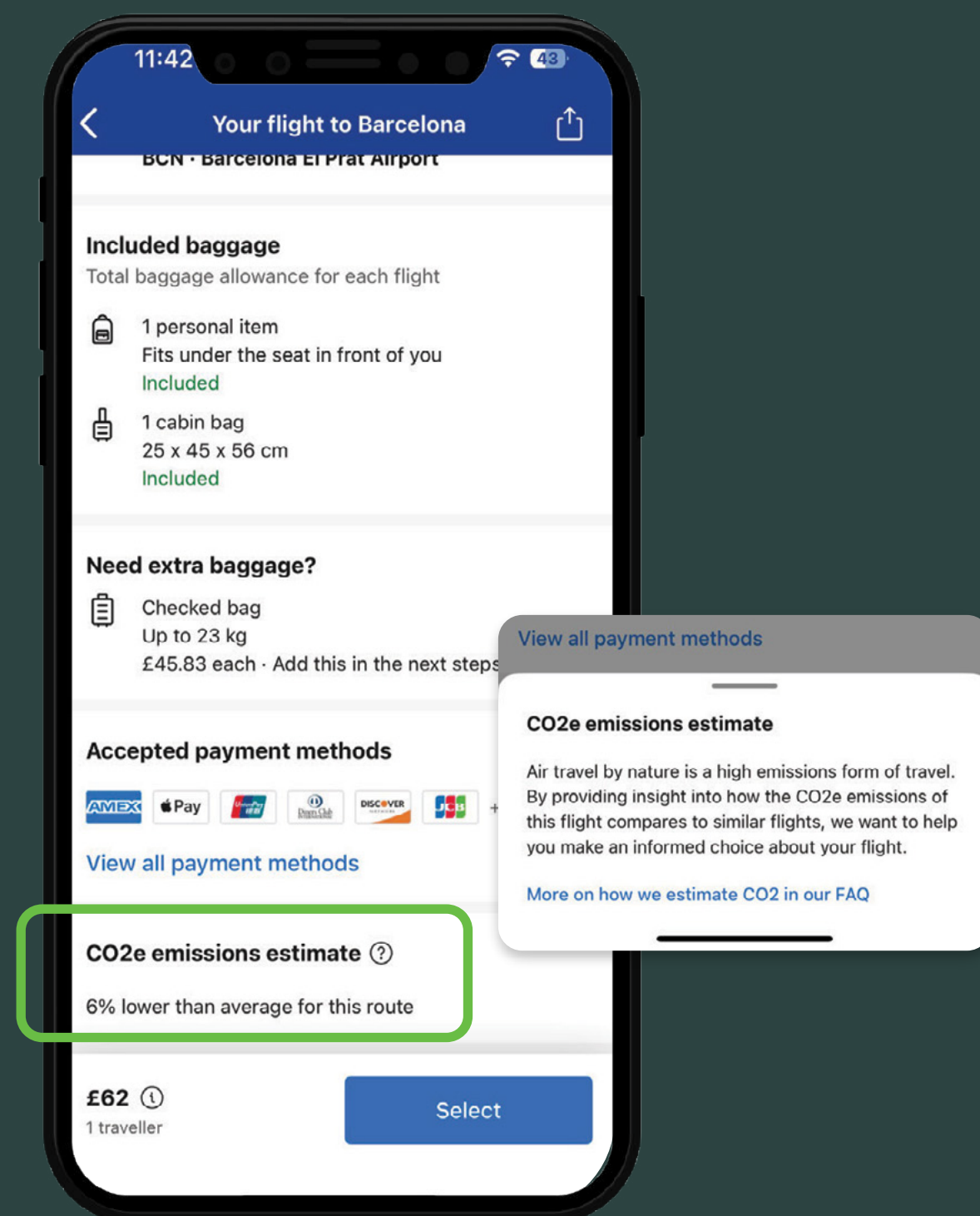
## Aviation and accommodation

### Aviation

In collaboration with Travalyst, Google developed an industry-leading, open-access model for estimating carbon emissions for flights. We have worked with partners to scale adoption of the model and ensure this information is accessible to travellers through their booking platforms.

#### As a result...

Flight emissions estimates have appeared in over 130 billion searches worldwide.<sup>19</sup>



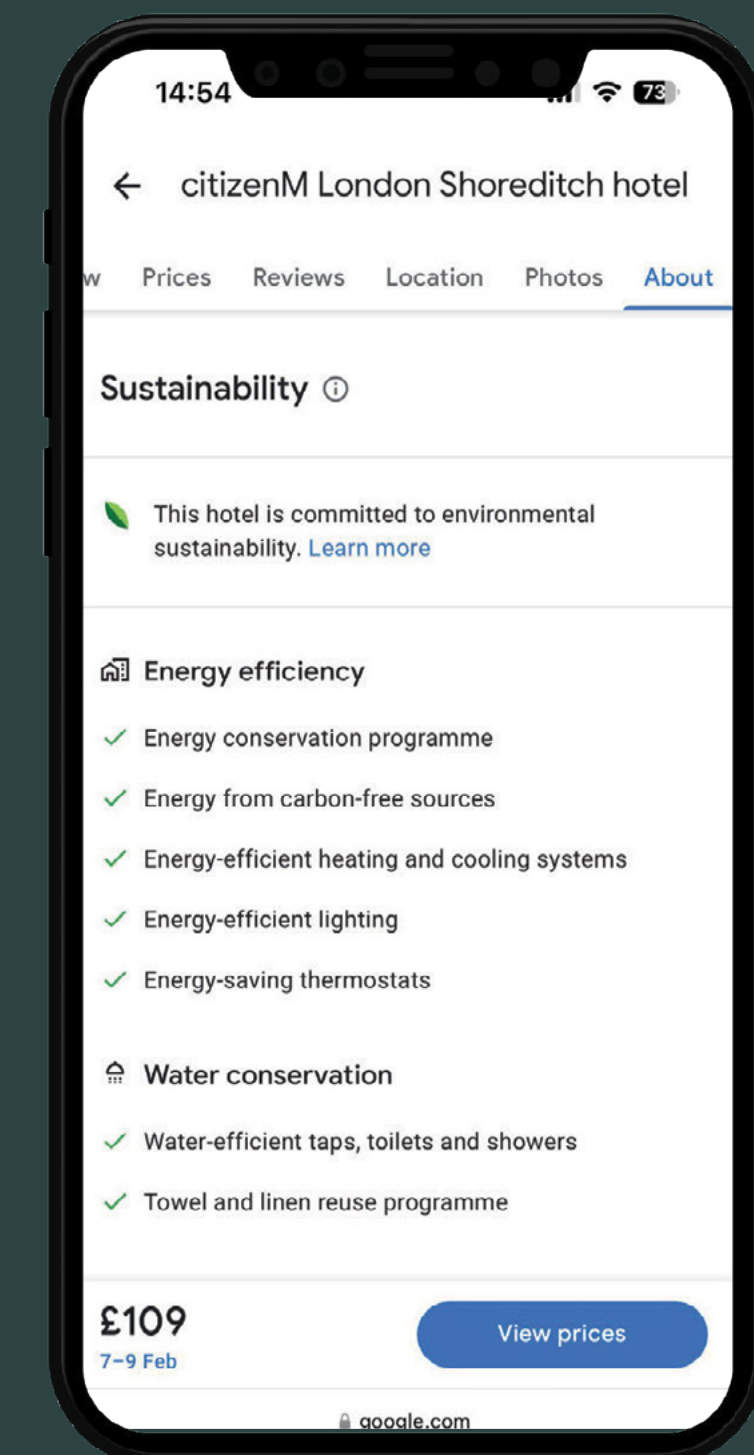
Booking.com

### Accommodation

In an effort pioneered by Booking.com, we worked with travel platforms to collect and share – at scale – sustainability data from millions of hotels and vacation rentals, giving travellers more reliable information at their fingertips.

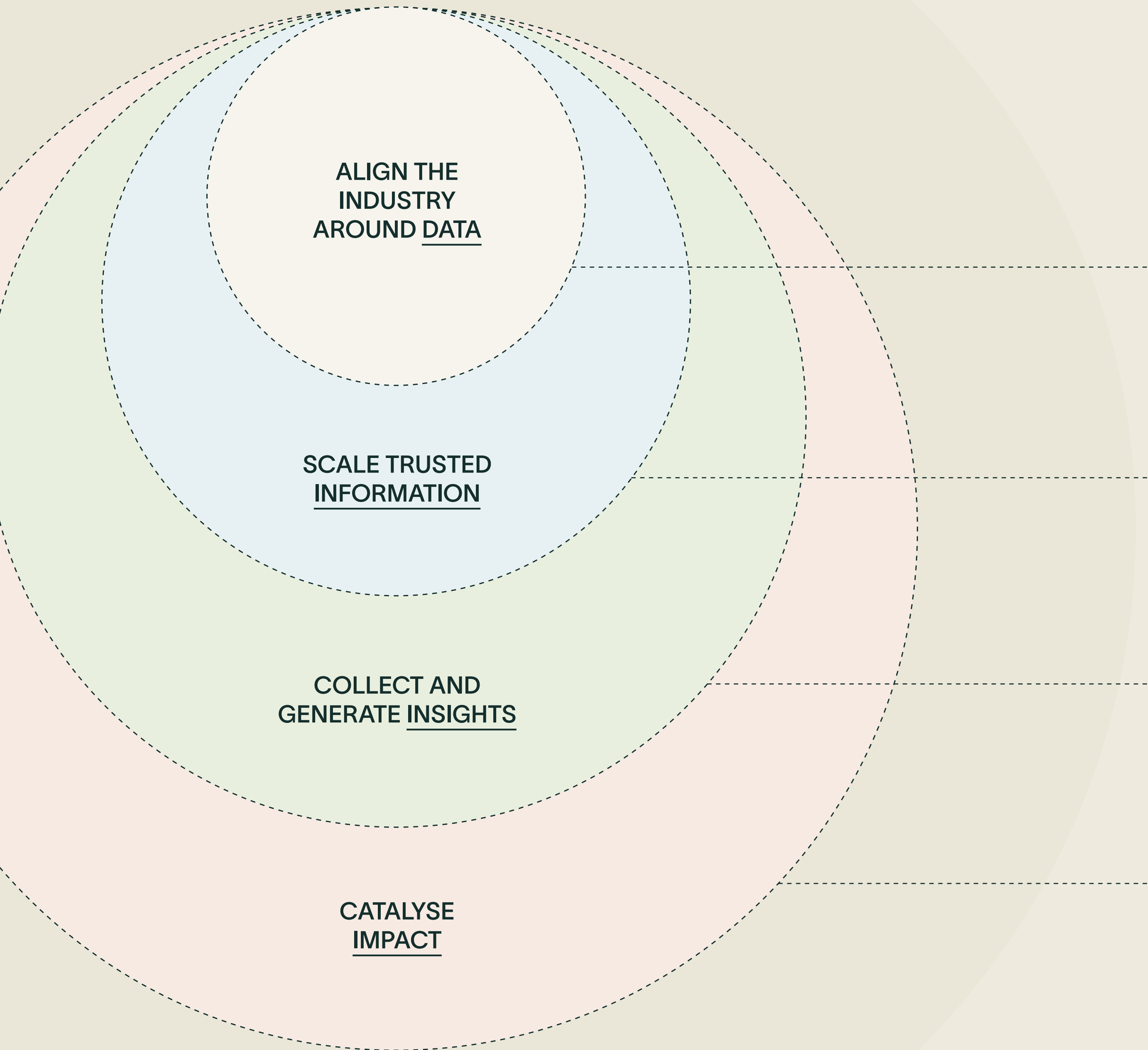
#### As a result...

Millions of data points on sustainability have been collected by our partners and shared with travellers globally.



Google

In the next section, you can find out more about these industry-leading initiatives and the impact they have had so far.



## How we're delivering impact

We align the industry behind solutions to collect, maintain, and distribute sustainability data.

We help travellers, travel companies, and policymakers freely access consistent, credible, and compliant sustainability information based on this data.

We convene the industry and gather insights on what's working – and what's not – so we can learn from one another and course correct where needed.

We advocate for coordinated change across the entire travel ecosystem so the industry can deliver positive and lasting impact.

# How far we've come

# When we launched in 2019, the world looked very different to how it does today.

## Travellers

Travellers were increasingly aware of the dangers of climate change and environmental degradation, and they wanted to make purchasing decisions that aligned with their values. However, most didn't know where to start. It was difficult for them to find information about the sustainability of their travel options — and the information that was available was confusing and inconsistent.

## Travel companies

Travel companies were increasingly aware of the business case for sustainability and eager to make progress, but were operating largely in silos and with little data to track progress. They were focusing on their own programmes to engage suppliers and consumers. As a result, their efforts were well-intentioned but fragmented.

## Policymakers

Policymakers around the world were focused on implementing measures to deliver on the Sustainable Development Goals (SDGs) and other climate-specific targets such as limiting global warming to 1.5°C. However, legislation on sustainability reporting and communicating sustainability information to consumers was still in the very early stages.

In this context, Travalyst set out a shared vision to rally the industry:

**A world where each of us - travellers, businesses, policymakers, communities and more - can make more informed decisions that lead to a net-zero, equitable, and nature-positive future for all.**

Over the years since, we've laid strong foundations that will enable us to achieve that vision – while the world around us has changed dramatically.

# Our journey so far

# 2019

# 2020

# 2021

# 2022

# 2023

# 2024

## Travalyst milestones

Travalyst launches with five founding partners, including some of the world's biggest travel booking platforms.

This marks the first time that these industry leaders have come together around an initiative to advance sustainable tourism practices.

Travalyst appoints an Independent Advisory Group, made up of world-leading travel and sustainability experts.

The advisory group helps ensure that initiatives put forward by Travalyst are credible, scalable, and impactful.

Spearheaded by Booking.com, Travalyst delivers a first-of-its-kind framework for the industry to collect and display consistent sustainability information for accommodation options.

As a result, millions of data points are shared with travellers on accommodation booking platforms, enabling them to make more informed choices. →

Google launches the Travel Impact Model (TIM), in collaboration with Travalyst.

For the first time, the industry has a freely and openly available model for consistently estimating flight emissions, which can then be shared with travellers directly at the point of booking. →

Travalyst establishes a Policy Unit to help bridge the gap between the collective voice of the travel industry and policy-makers working to advance sustainability outcomes.

The unit supports Travalyst and its partners to ensure their sustainability initiatives are compliant and engages with governments and regulators to inform policy development and implementation.

Travalyst releases a list of sustainability certifications, standards, and schemes to help bring consistency to the information being presented to travellers and ensure compliance.

This helps build alignment across the industry on credible initiatives to display, with the aim of boosting trust amongst travellers. →

## The global backdrop for our work

The world approaches the five-year anniversary of the Sustainable Development Goals, with little progress towards key targets and increased urgency for action.

The COVID-19 pandemic brings the world — and travel — to a standstill, raising fundamental questions about the viability of the industry and its impact on people and the planet. Meanwhile, the European Green Deal is approved, setting a roadmap to achieve net zero within the EU and creating a model for other regions.

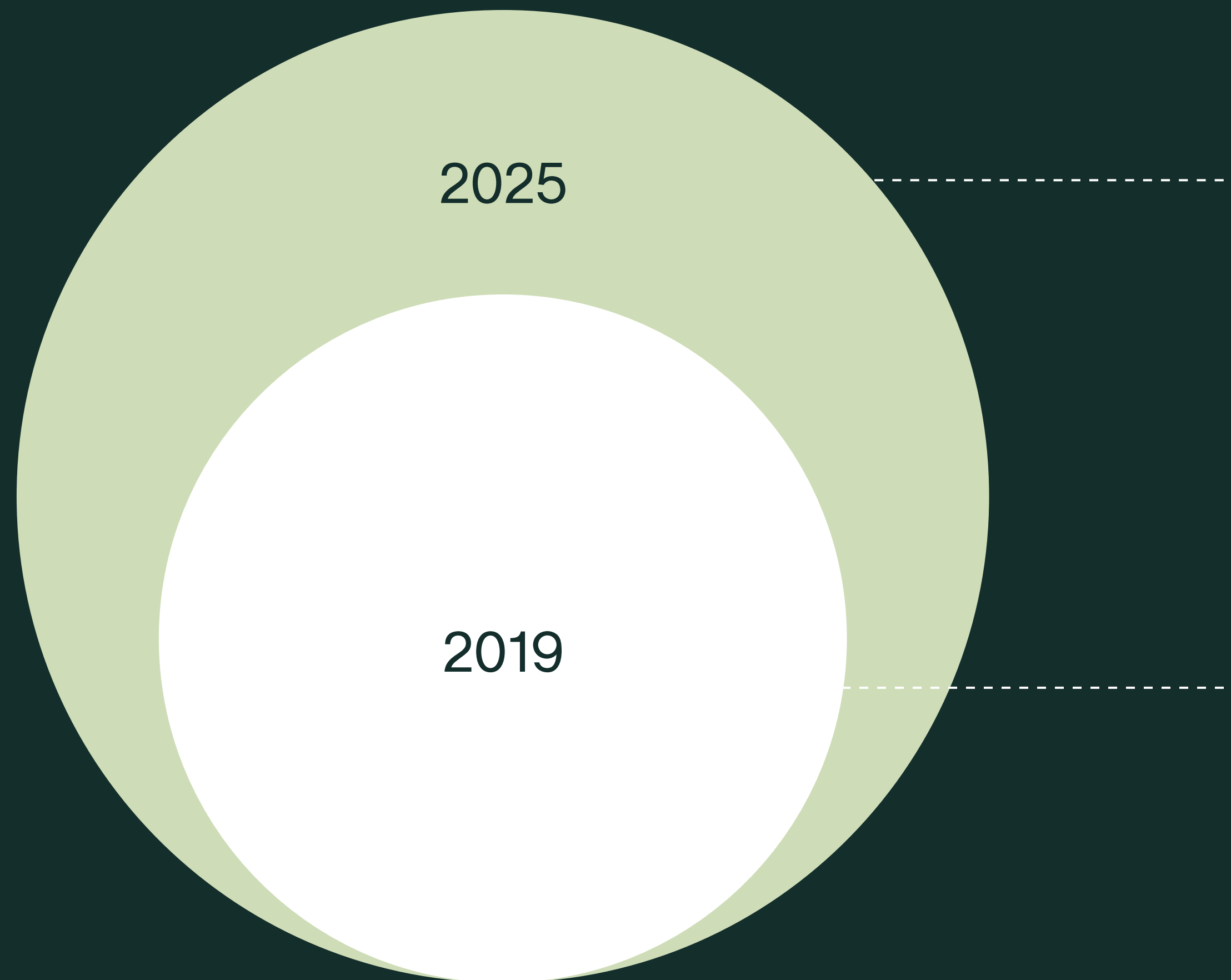
The UN Tourism-led Glasgow Declaration for Climate Action in Tourism is launched at the UN Climate Change Conference (COP26), aligning the travel industry for the first time around clear climate goals and pathways. This includes a commitment to reduce greenhouse gas emissions by 50% by 2030. →

The Kunming-Montreal Global Biodiversity Framework is agreed, including a commitment to protect and restore at least 30% of the planet's land and sea, which the travel and tourism industry relies on. This landmark agreement rallied the world around clear targets for conservation and highlighted a growing recognition of both nature's impact on people's lives — and our collective impact on nature.

The European Commission puts forward a proposal for a "green claims" directive, which would require companies to address greenwashing and protect consumers and the environment.

Tourism is included in the UN Climate Change Conference (COP29) Action Agenda for the first time, building on the progress in Glasgow and demonstrating global recognition of the importance of the sector to achieving wider sustainability goals. →

## Size of Travalyst coalition



**13 partners**

representing a combined market value of over

**\$3 trillion**

**5 partners**

representing a combined market value of

**\$500 billion**



# Spotlight

## Our key achievements

### Fostering an unprecedented level of collaboration on sustainability across the industry

One of our biggest achievements over the last five years has been convening the world's leading travel and technology companies — and creating an environment where they can feel comfortable collaborating.

These companies are rightfully very protective of their proprietary data, and antitrust rules create strict guardrails for cooperation among competitors. So getting these companies around the same table and actively collaborating towards shared sustainability outcomes has been a major win. It has taken time, building trust, and a shared belief amongst our partners that advancing sustainability across the sector should be a collective effort.

In addition to bringing together individual travel companies, we have also worked closely with associations representing different parts of the industry. The travel and tourism industry

is incredibly diverse, including companies that deliver travel services — such as transport and accommodation — as well as the platforms and technology companies that enable travellers to easily access and book those services.

These different parts of the industry rarely come together; instead often operating in respective silos. Travalyst has worked to change that, creating a coalition for the entire sector to work together towards a shared vision for a more sustainable future. As an independently governed not-for-profit without commercial interest in the data that is being collected and shared by our partners, we are ideally suited to play this convening role and help the industry forge collective solutions.

\* We have grown our coalition to 13 partners so far, representing a combined market value of over \$3 trillion. We have also built strategic partnerships with major industry bodies to drive global alignment on sustainability efforts.

#### Coalition partners



#### Strategic partners



See what's next for our collaboration across the industry [→](#)

## Enabling some of the world's biggest booking platforms to share consistent flight emissions estimates

Creating a standardised method for estimating the CO<sub>2</sub> emissions from flights may sound relatively straightforward, but the reality is much more complicated.

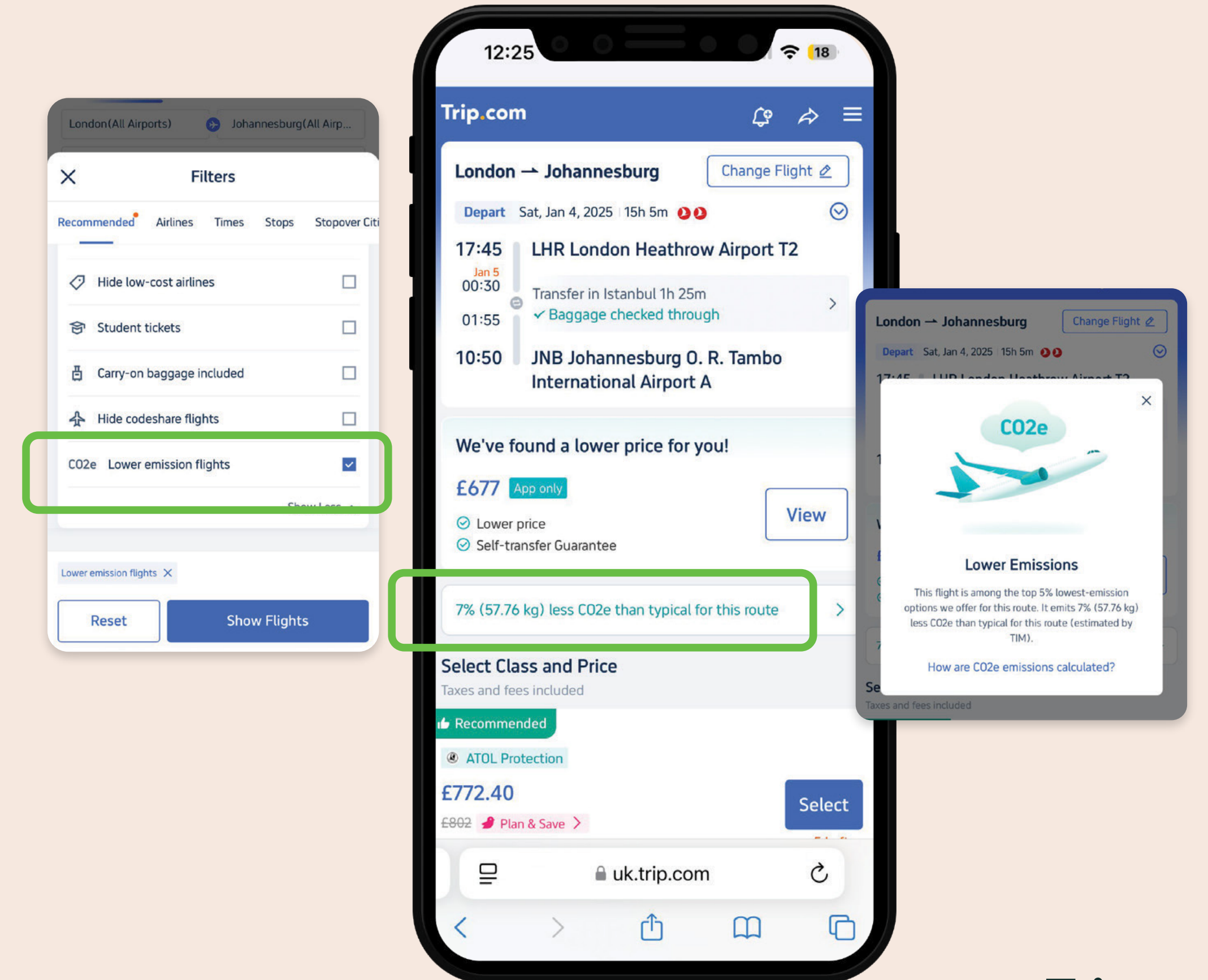
Before we convened the industry around a consistent model, many booking platforms and airlines had different approaches, which were often behind proprietary paywalls. The result was a confusing picture for travellers, making it difficult for them to compare – and trust – the information that was being presented to them about their flight options.

The Travel Impact Model (TIM) changed this. Developed by Google in collaboration with Travalyst, the model provides accurate CO<sub>2</sub> emissions estimates for any given flight, taking into account several key factors:

- Flight origin and destination
- Aircraft type
- Cabin class
- Seat configuration
- Load factors

It then makes it easy for booking platforms to display this information using a free and publicly available API. When the estimates are shown, the lower-emitting flight is flagged, empowering travellers to select a flight with lower-than-typical emissions, reducing the impact of their trip.

\* Eight of our partners are using the Travel Impact Model, and emissions estimates have been displayed in more than 130 billion searches worldwide.<sup>20</sup>



**Trip.com**



# Case study

## Sabre x Google collaboration

**Sabre – a leading software and technology company that powers the global travel industry – and Google joined forces to use the Travel Impact Model (TIM) to calculate past emissions from business travel.**

The joint pilot program involved a team of Google analysts using Sabre's 2023 business travel data to calculate flight-level corporate travel emissions and recommend strategies for future reductions.

Google analysts looked at TIM per flight calculations and suggested CO2e reductions based on alternative flight options. The analysis revealed that focusing on the most polluting routes could yield the most significant impact. For instance, long-haul flights were identified as a key area for improvement. The TIM identified lower-emitting same-day alternatives for two-thirds of flights, including common routes like Dallas-London and Dallas-Frankfurt, with a potential emission reduction of up to 10%.

Business travel represented almost 7% of Sabre's carbon footprint in 2023. The company can now incorporate these insights into their travel policy to reflect these reduction goals. GetThere, the corporate online booking tool used by Sabre, integrated TIM emissions data in 2023, enabling corporate travel bookers, including Sabre's own employees, to view accurate carbon estimates for their flights during the booking process. Sabre intends to explore incorporating this capability into its agency and corporate booking tools so that customers can see more accurate emissions estimates from their past bookings.

“ Taking responsibility for our own emissions, striving towards the most accurate methodology, and working on innovative ways to reduce emissions alongside traditional methods are areas of focus for us. ”

Jessica Matthias | *Senior Director of Sustainability*

**Sabre**

“ Companies increasingly need to understand and report the impact of their business travel. Our long-term collaborative efforts and Sabre's granular dataset made them the obvious choice for this pilot program. ”

Sebnem Erzan | *Global Head of Travel Sustainability Partnerships*

**Google**

## Giving travellers access to sustainability information for hotels and vacation rentals

Assessing the sustainability data of accommodation providers is even more complex. The sector is incredibly diverse, made up of a wide range of operators – from global chains, to boutique hotels, to short-term rentals. The level of in-house knowledge about sustainability varies significantly from company to company, as does their capacity to collect and share data with travellers. The nature of the sector also means that its footprint is more complicated – incorporating energy usage, water consumption, waste management, biodiversity, community impact, and more.

When we launched Travalyst, we heard from partners across the accommodation sector that they wanted a more consistent – and holistic – way of assessing their sustainability efforts. In response to this need, we piloted an industry-leading initiative, which would make it possible for some of the world's biggest booking platforms to share sustainability information for both hotels and vacation rentals – at scale – for the first time.

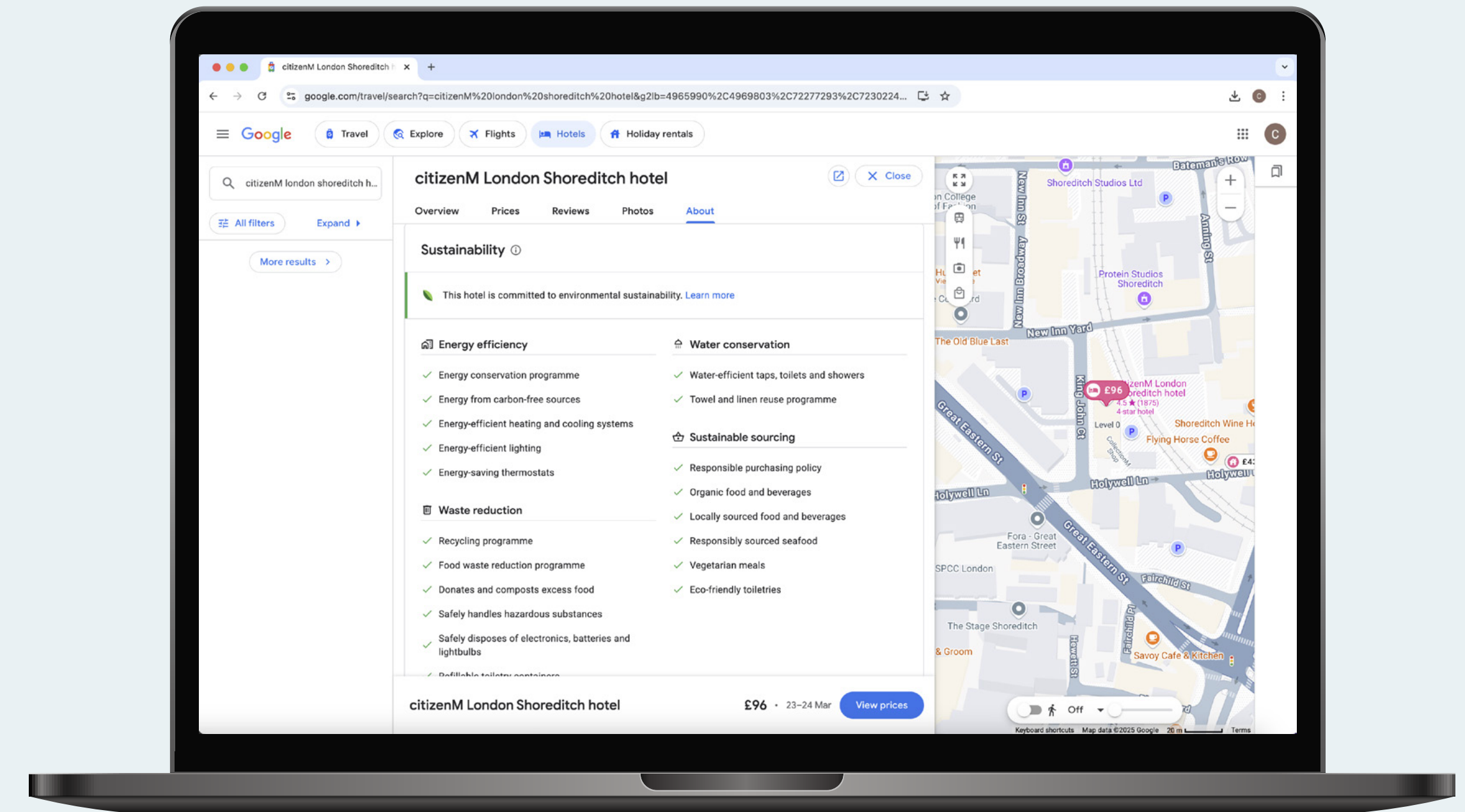
Spearheaded by Booking.com, we worked with our partners and industry organisations to select over 60 attributes that could be used to assess each property's sustainability efforts across five categories:

- Energy
- Waste
- Water
- Biodiversity & ecosystems
- Destination & community

These attributes were validated by our Independent Advisory Group, and our partners then collected information about the sustainability efforts being undertaken by accommodation providers in these areas. The information collected by our partners was shared with travellers on their platforms, enabling them to make more informed decisions.



Three of the leading accommodation booking platforms – Booking.com, Expedia, and Google – adopted this approach. To date, they have shared millions of data points with travellers.



Google

See what's next for our Data Hub



# Aligning the travel industry around credible and compliant sustainability certifications, standards, and schemes in accommodation

Certifications, standards, and schemes can help accommodation providers assess how their actions impact both people and the planet — and signal to travellers that they take this impact seriously. However, the sustainability certifications industry encompasses a wide range of approaches, creating confusion for both travellers and accommodation providers.

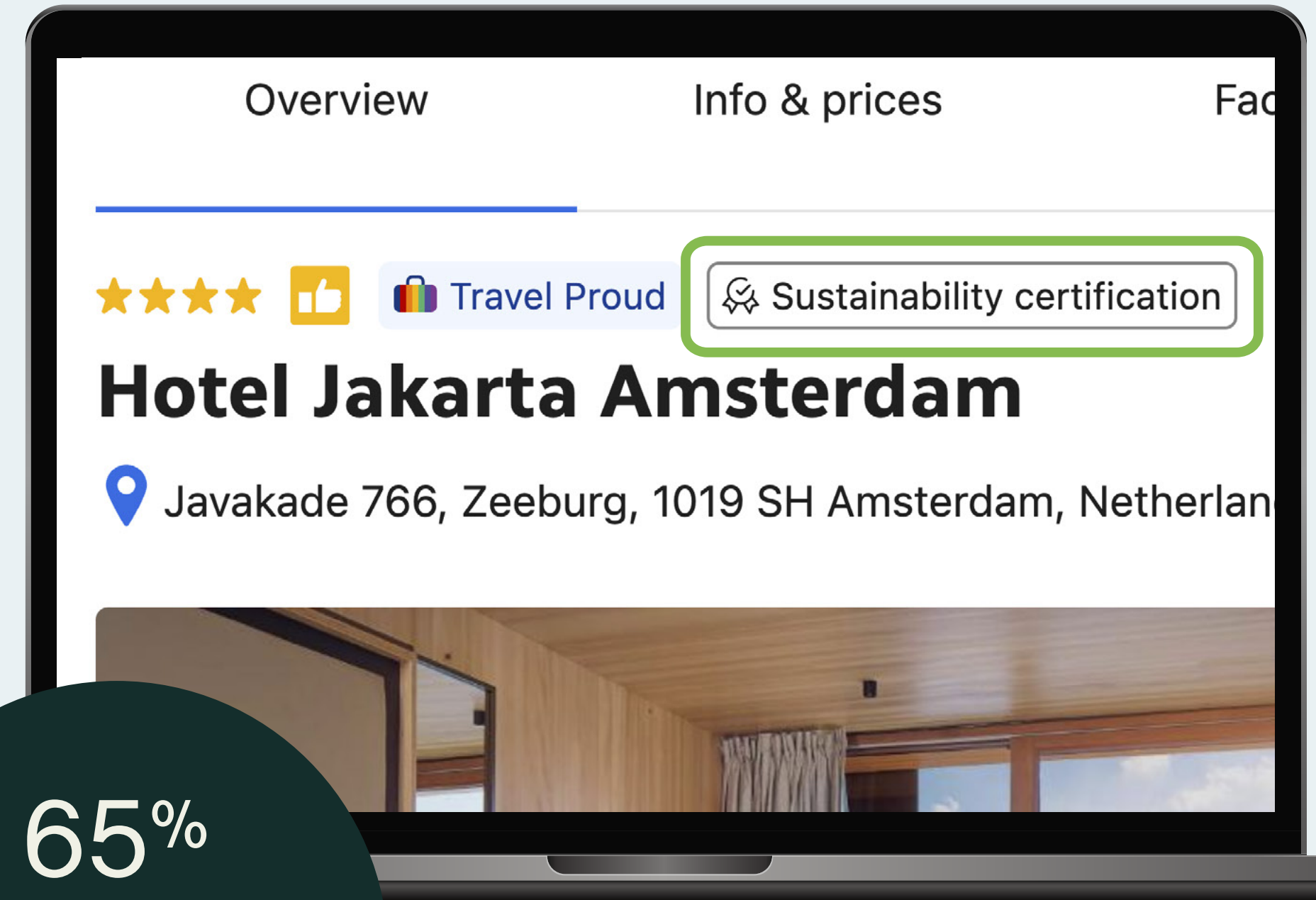
For travellers, it's not clear what each certification stands for — or how properties are assessed for their sustainability practices. For accommodation providers, pursuing certifications is an expensive and time-consuming endeavour, and it's important for them to know those efforts will be recognised and visible in booking pathways.

To address this challenge, we worked closely with our partners and our Independent Advisory Group to develop an initial set of criteria, set to evolve over time, that has broad industry alignment. We created a transparent process for certifications to be reviewed based on these criteria, and we publish those that pass on our website for our partners and the wider industry to coalesce around.

We aim to be as inclusive as possible, which is why we have made this initiative free and accessible to all certification providers, no matter how big or small.

We're also working with global booking platforms to drive consistency in which certifications they display, making it easier for travellers to differentiate between properties.

\* We have reviewed 76 certifications, and 60 have met Travalyst's criteria so far. Google and Booking.com both display certifications that are on our list — raising visibility amongst the millions of travellers who use their platforms.



65% of travellers would feel better about staying in an accommodation if they knew it had a sustainable certification<sup>21</sup>

67% of travellers agree that all travel booking sites should use the same certifications and labels<sup>22</sup>

Booking.com

## Our role within broader global conversations

Launched at COP26, the Glasgow Declaration for Climate Action in Tourism, led by UN Tourism, aligned the industry for the first time around a clear set of sustainability targets. This includes reducing greenhouse gas emissions by 50% by 2030 and reaching net zero as soon as possible before 2050.

Organisations that sign onto the declaration are required to deliver climate action plans within 12 months and report publicly about their progress on an annual basis. 900 organisations have become signatories of the Glasgow Declaration so far, 370 of which have developed action plans.<sup>23</sup>

A member of our Independent Advisory Group, Jeremy Smith, was a co-author of the declaration and Travalyst was a founding signatory.<sup>24</sup> As a signatory, we released our own Climate Action Plan in 2021, which clearly outlines our targets and our updated annual progress towards meeting them.

During COP29 in 2024, Travalyst also played a critical role in convening the travel sector to build on the consensus forged in Glasgow and accelerate progress towards sustainability goals. We provided feedback on the draft of the COP29 Declaration on Enhanced Climate Action in Tourism and were actively involved in the summit's Tourism Day, which was the first ministerial-level meeting dedicated to positioning tourism policy to support national climate goals.

We are committed to continuing our engagement through these global platforms – and others – to help represent the voice of the travel industry to policymakers and explore how it can support the world to achieve broader sustainability and conservation goals.

See what's next for our global policy work



# What's next

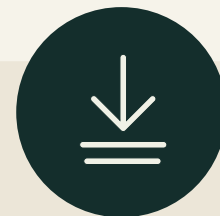
## All eyes on 2030

**2030 is a major milestone in human history. It is the deadline for critical climate and biodiversity targets as well as the Sustainable Development Goals, and it serves as a north star guiding global action.**

When done well, travel and tourism – one of the world's largest and most interconnected sectors – can play a unique and pivotal role in achieving these targets, helping to protect ecosystems, preserve cultures, and foster equitable economic growth.

With that in mind, we're calling on the travel industry to join us in aligning behind a set of three core goals over the next five years:

### Climate



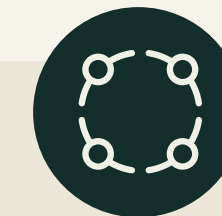
Reducing our carbon emissions by 50% by 2030.<sup>25</sup>

### Nature



Protecting and restoring at least 30% of the planet, land, and sea by 2030.<sup>26</sup>

### Communities



Promoting truly sustainable tourism that enables a just transition of inclusive economic benefits, reduced inequality, and which preserves local culture and fragile ecosystems.<sup>27</sup>

While there are other actions industry leaders can – and should – take to improve their impact on people and places, these three goals are essential. They underpin the future of this planet and our freedom to continue exploring it.



# Our 2030 ambition

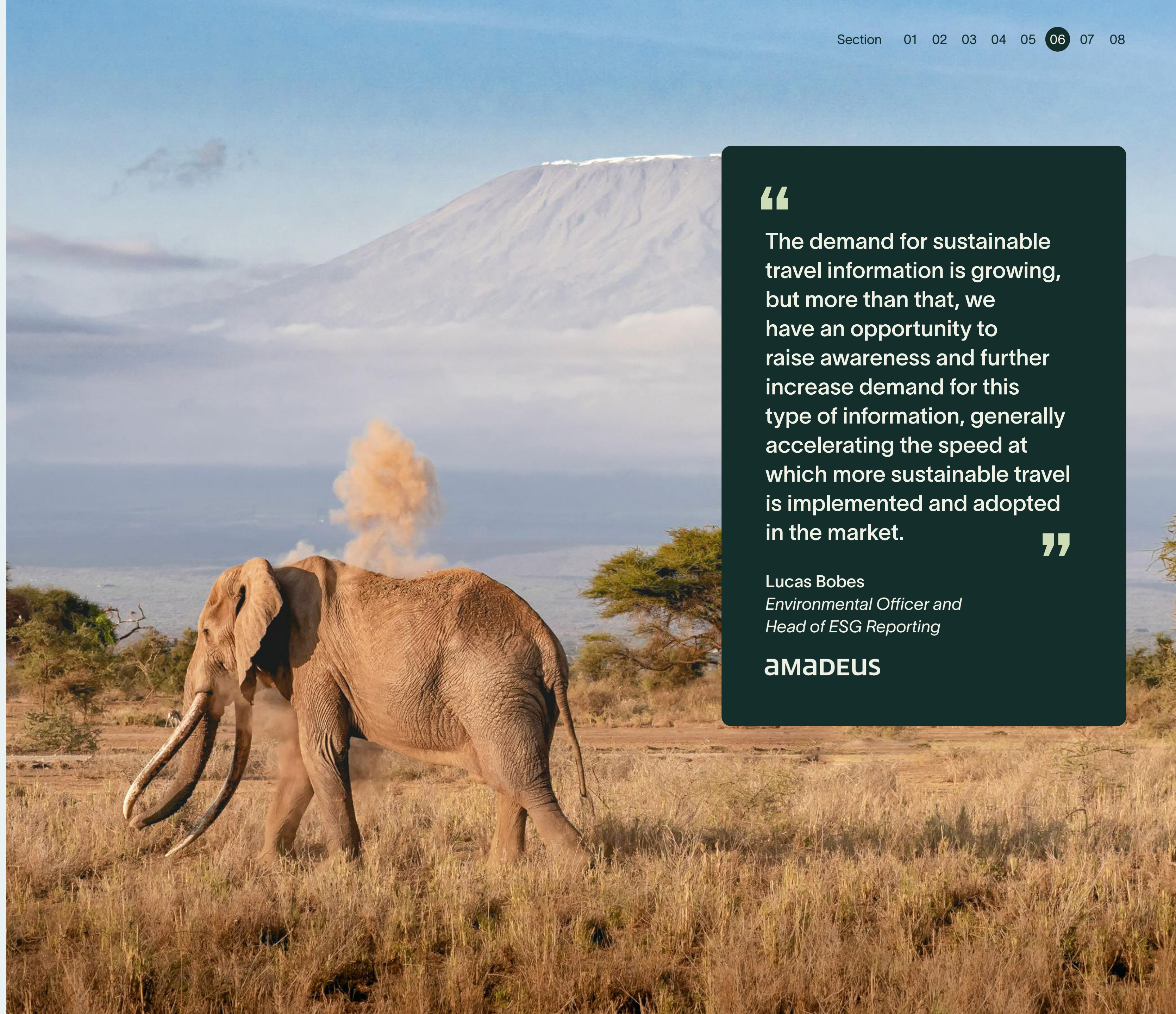
We believe that Travalyst has an important role to play in this effort, building on the strong foundations we have laid and continuing to catalyse action across the industry to a degree that no other organisation has achieved.

We have set a bold ambition for ourselves:

**By 2030, Travalyst will align the travel industry to collect and distribute sustainability information at scale to accelerate action across the ecosystem through shared knowledge, insights, and best practices.**

We have chosen to focus on this because reliable and timely data will be critical to systemic change over the coming years. Without it, it will be impossible to know *whether* we're on the right track to reach our collective targets, *what* to do to deliver greater impact, or *how* to implement these efforts effectively. Travalyst is uniquely placed to help fill this gap, thanks to the trusted relationships we have created with some of the biggest players across the travel and tech industries.

Over the last five years, we have proven that when these organisations come together in the spirit of collaboration and collective action, remarkable things happen. Over the next five years, we will build on our shared successes and take our work together to the next level.



“

The demand for sustainable travel information is growing, but more than that, we have an opportunity to raise awareness and further increase demand for this type of information, generally accelerating the speed at which more sustainable travel is implemented and adopted in the market.

”

Lucas Bobes  
*Environmental Officer and  
Head of ESG Reporting*

**amadeus**

# Key priorities

## Launching a Data Hub, with an initial focus on accommodation sustainability data

The demand for sustainable travel options is expected to grow over the coming years, particularly amongst corporate travellers. While most travellers<sup>28</sup> – regardless of the reason for their trip – are eager to travel more sustainably, it is becoming increasingly important for those who travel for business.

As we approach 2030, companies are coming under more pressure to reduce their carbon footprints, in line with the targets they have set. Reducing so-called “scope three” emissions – those that occur outside of a company’s direct value chain – will be critical to this effort; and travel often

makes up a significant portion of companies’ scope three footprints. Incoming legislation in several geographies will also require companies to report on their sustainability efforts, further driving demand for more sustainable travel options.

But while the demand is there, travellers’ ability to act on it by identifying and booking more sustainable options is hampered by the fact that there is no single, reliable source for data that consistently measures environmental, social, and economic impact – and then distributes it in a way that makes it easily accessible.

With this in mind, we are collaborating with partners across the sector to identify key sustainability data points and create a central location to collect, process, and ultimately distribute this information at scale.

We are starting with the accommodation sector, but ultimately, this will be expanded across other key areas of the travel ecosystem. This will include the existing aviation data that is compiled through the Travel Impact Model as well as data from the rail sector, conferences and exhibitions, and more.

The Data Hub will:

- **Consolidate accommodation sustainability data:** We will continue to work with our partners

to develop an aligned way to collect and display environmental footprint information consistently, building and iterating on the approach we have already developed.

- **Make that data accessible:** Similar to the Travel Impact Model (TIM) for aviation, we will ensure that this data is easily accessible to partners across the industry and can be integrated directly into the booking platforms used by both corporate and leisure travellers.
- **Ensure compliance and credibility:** We will ensure that the metrics we use align with emerging global regulations, supporting companies using the Data Hub to remain compliant amidst an evolving landscape.

While developing the Data Hub, we will leverage our recent acquisition of Weeva, a sustainability-management platform created specifically for accommodation providers. The intellectual property and functionality we acquired will give us a significant foundation and head start in our ongoing efforts to provide sustainability data, open-source, at scale.

We continue to look for opportunities to align our work on the Data Hub with our other initiatives, for example, by integrating our work on sustainability certifications.



There is a need to provide travellers with information about the sustainability of their travel options in a way they can easily act on.

Of those who have travel plans for 2025



considered accommodation providers’ sustainability efforts.

But only



factored this into their decisions.

Source: YouGov; see methodology section for details.

## Updating our certifications criteria to align with incoming regulations

Despite the current political context and shifting guidance, 2025 is still set to be a major year for sustainability regulation. The European Union's Corporate Sustainability Reporting Directive (CSRD) will come into effect. We also expect the Green Claims Directive (GCD) negotiations to be finalised this year (coming into effect in 2027/28); this will impact all companies and certification schemes that wish to make claims about the environmental merits of their products and services to European consumers.

While the centre of gravity for this work is the European Union, the influence of that market for global companies means that it will drive broader change across industries, with other jurisdictions likely to follow suit.

As a result of these incoming regulations, a wider range of companies will now be required to report on their sustainability efforts, and there will be stricter rules for the way they present these efforts to consumers, for example, through the GCD.

The sustainability certifications sector is rushing to keep up with these changes, updating their approaches to ensure compliance. Similarly, we will continue to work with our partners to bring more transparency and consistency across the industry.

# Nearly 1/2

of travel industry respondents say there is a need for an organisation within the sector without a financial interest in certifications to review them and make recommendations.

Source: Travalyst industry survey; see methodology section for details

# Over 1/3

say there is a need for government intervention to ensure that certifications are compliant with incoming regulations.



## Refining and futureproofing the Travel Impact Model

Since its launch by Google in 2022, the Travel Impact Model (TIM) has been refined to expand the type of greenhouse gas emissions it analyses and improve how it estimates emissions for aircraft that carry both passengers and cargo together, amongst other updates. Over the coming years, it will continue to evolve.

Some of the focus areas include:<sup>29</sup>



Providing existing users of the model with access to emissions data for past flights – in addition to estimates for future flights – helping to aid corporate reporting.



Improving the accuracy and precision of fuel burn calculations – which are critical to estimating emissions – by considering a wider range of factors such as aircraft age.



Incorporating data on short-lived climate pollutants, such as contrails, to better represent the total climate impact of air travel.



Accounting for the use of sustainable aviation fuels, which are being developed by airlines and jet fuel providers.

As technology advances and aircraft manufacturers develop zero-emissions planes – including those fuelled by hydrogen or electricity – the model will also take that into account. These efforts are still in their early stages, but it will be important to future-proof the model to ensure they can be seamlessly integrated when the time comes.

Alongside feeding into these refinements to the model through our role on the TIM Advisory Committee, we will continue our work to scale its adoption across the industry, encouraging booking platforms to prominently display emissions data for flights – and present it in a way that travellers can easily understand and act on.

We will also mobilise our partners to share best practices and lessons learned from how travellers' are engaging with this information. This transparency and collaboration will be critical for us to measure not only how many travellers see emissions estimates in their searches, but also what they do as a result.



## Deepening – and broadening – our partnerships across the travel and tourism ecosystem

To support this work and catalyse impact across the entire travel and tourism ecosystem, we will need both to deepen our collaboration with our existing partners and broaden our network.

For our existing partners, as well as helping them to adopt our tools, one of our core areas of focus will be supporting them to share insights on how travellers are engaging with the sustainability information they display – and the actions they take as a result. For example, when travellers view information about flight emissions, how much do they interrogate this? How often do they select the lowest-emitting flight, and how does this factor alongside other key considerations such as price, airport selection, and duration? Sharing this type of information will be crucial for us as an industry to measure our impact – and identify and address any unintended consequences.

We will also grow the number of partners we work with and expand the product areas we cover. For example, as we roll out our Data Hub, we will expand our network of partners across the accommodation sector as an initial step. As we then integrate other sectors such as rail into the Data Hub, our network of partners will expand into those areas as well.

Alongside our work with individual companies – including booking platforms, airlines, and accommodation providers – we will also deepen our collaboration with industry associations and others such as IATA, EASA, WSHA, GBTA, GSTC, WTTC, ETC, UN Tourism, Global Travel Tech, and the Travel Foundation, which convene key segments of the industry. Many of these are already doing excellent work to advance sustainability within their industry segments; we believe we can play a key role in linking these efforts together. It is only by coordinating action across the entire travel and tourism ecosystem that we can truly deliver lasting impact.

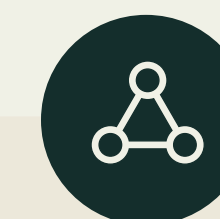


The travel industry strongly supports transparency.

# 9 in 10

say governments should ensure that travel and tourism companies report on their sustainability and environmental impact.

Source: Travalyst industry survey; see methodology section for details



There is also strong demand for greater collaboration.

# Nearly 1/3

say companies should collaborate more with each other to advance sustainability, including by sharing more data on what is working and what is not.

Source: Travalyst industry survey; see methodology section for details

## Enhancing our collaboration with policymakers

The travel industry is, by its nature, global. That means that the fragmentation of regulation has a greater impact than in many other sectors. As new regulations are implemented in Europe – and other jurisdictions ramp up their efforts – one of our key areas of focus will be encouraging consistency and harmonisation.

To enable action at scale, it is crucial that travel companies can develop and implement coherent sustainability action plans that are compliant with regulations in all the countries and regions in which they operate. The next few years will be critical; the time and resources that a company spends managing regulatory inconsistency has a knock-on effect on its ability to act on its sustainability plans quickly and decisively.

With that in mind, our Policy Unit is accelerating its activities, engaging with global leaders through platforms including the G20, the G7, and COP. We are also engaging through regional initiatives, including sitting on the accommodation working group for the European Commission's Product Environmental Footprint Category Rules (PEFCR). The PEFCR sets out a new and improved method for companies to measure the environmental performance of any product throughout its life cycle, and we are working with our partners to provide guidance – directly from the industry – on practical implementations to ensure that what is developed is workable and scalable.

This work is possible thanks to the reputation we have built as an independent, credible, and impartial voice covering all segments of the travel industry. As an independent not-for-profit, accountable only to the planet, we are uniquely placed to share insights and convene constructive dialogues with policymakers through these platforms and others.

We will also engage with policymakers as we develop our Data Hub, ensuring that it is future-proofed and compliant with regulations that are currently on the table – and those that are still being explored. When the Data Hub is launched, we will provide policymakers with access, ensuring that they have relevant and current information to track the impact of their policies, identify potential gaps, and monitor for unintended consequences.



The travel industry needs support preparing for incoming sustainability regulations.

# Only 1/3

feel very well-equipped to deal with incoming regulations.

Source: Travalyst industry survey; see methodology section for details



# 9 in 10

respondents in the travel industry believe governments should create stronger incentives for travel and tourism companies to improve their environmental sustainability.

Source: Travalyst industry survey; see methodology section for details

# Measuring our impact

Over our first five years, our core focus has been getting credible sustainability information into the hands of travellers at a scale never seen before. We have achieved that ambition.

One of our key metrics for gauging our success during this period was the number of searches that information appeared in. With flight emissions data appearing in over 130 billion searches worldwide, we and our partners can be proud of what we have achieved together. As we move into our next phase, we will take the next step, looking at how this information is driving impact.

This work must be underpinned by a robust understanding of the change we are trying to drive across the industry, what needs to happen to deliver that change, and the unique role that Travalyst will play. We have developed a five-year plan to guide our work and are now consulting with our partners across the industry, listening to their views, and getting their input for our updated Theory of Change. This will help to identify the pathways that we need to collectively prioritise over the next five years to meet the industry's sustainability goals.

**As we look to our next five years, it is also critical that we are able to measure and effectively communicate the impact of our efforts – and those across the broader travel and tourism ecosystem.**

We will leverage our unique role within the industry and our trusted relationships with partners to collect and share insights, and convene honest conversations.

As an industry, we need to recognise that not everything we do will have the impact we want. When dealing with complex issues at a systemic level, you sometimes have unintended consequences. We must be honest when these occur – and remain agile in how we address them. This level of transparency and accountability will be essential for both developing more effective solutions and building and maintaining trust.

To that end, we are also boosting our own reporting processes. This is the first of what will become annual impact reports, which we will use to update on our progress.

# The actions you can take



Deep and intentional collaboration is needed, with urgency, to protect the communities and places that we love for future generations. Whether you work for a travel company, you are a policymaker focused on regulating it, or you simply want to travel more sustainably yourself, you can play a role.



# Travellers

## When you travel, make every holiday or business trip count.

“

We recognise that travel and tourism — like broader consumer activities — need to adopt a greater focus on sustainability in order to preserve communities and places for visitors long into the future. Visa is proud to partner with the Travalyst coalition to leverage the collective knowledge, resources, and platforms of leaders in the travel and tourism sector to empower businesses and consumers to make more sustainable choices.

”

Nate Hurst | Chief Sustainability Officer



### Key actions

- 01 When choosing where to travel and taking into account your carbon footprint, consider destinations closer to home when you can.
- 02 When considering how to get there, think about low-carbon transport options such as rail. And, if flying is your only option, look for carbon emissions information when booking flights and prioritise those that have lower-than-average emissions.
- 03 Seek out accommodation providers that have a sustainability certification that is on our list. →
- 04 When you are in a destination, prioritise your spending on local businesses, respect local cultures, and consider staying for longer.

# Travel companies

Drive change within your own organisation – and across the industry.

“

Leaders in the travel industry must all play a part in ensuring future generations are able to continue exploring the world around them in a sustainable manner. It is not something any one organisation can do alone: the travel sector is complex with significant inter-dependencies. That's where Travalyst plays a significant role in driving cross-industry collaboration and commitment.

”

Martin Nolan | Chief Legal Officer

 Skyscanner

## Key actions

- 01 Become a partner of Travalyst. By collaborating with us, we can accomplish more together. [→](#)
- 02 Leverage our platforms and resources, for example:
  - If your company provides flight bookings, integrate the Travel Impact Model (TIM) to provide emissions estimates. [→](#)
  - If you are an accommodation provider, pursue certifications that have been reviewed by Travalyst [→](#) and follow our channels to watch out for developments on our Data Hub. Details can be found below.
- 03 Sign on to the Glasgow Declaration and follow through with its annual reporting requirements. [→](#)
- 04 Align your sustainability plans with the three key goals focused on climate, nature, and communities:
  - **Climate:** Reducing our carbon emissions by 50% by 2030.<sup>30</sup>
  - **Nature:** Protecting and restoring at least 30% of the planet, land, and sea by 2030.<sup>31</sup>
  - **Communities:** Promoting truly sustainable tourism that enables a just transition of inclusive economic benefits, reduced inequality, and which preserves local culture and fragile ecosystems.<sup>32</sup>
- 05 Commit to transparency and data-sharing to enable progress across the industry. This includes sharing best practices and insights on how you have implemented Travalyst's solutions – and the impact they have had.

# Policymakers

Support the tourism ecosystem to create an environment that fosters growth and innovation – and provides a stable regulatory outlook to ensure long-term resources and investments.

“

‘No one can whistle a symphony. It takes an orchestra to play it.’ - Helen Keller. This rings particularly true when thinking about the multifaceted challenge of tackling climate change in the travel industry. By working together as a pre-competitive coalition, we can share best practice, drive solutions, and forge a sustainable future for travel, for the benefit of all.

”

Jessica Mathias | Senior Director of Sustainability



## Key actions

**01** Continue to include Travalyst in relevant policy discussions at the local, national, regional, and global levels to provide feedback.

**02** Pursue global regulatory alignment to ensure consistency and scalability – and ease – for compliance efforts.

**03** Implement and support a more robust, data-driven process for calculating, monitoring, and tracking emissions data and progress towards decarbonisation targets globally.

**04** Allow and support sustainability initiatives to be tested, grown, and pivoted in a controlled way in order to learn, scale, and create impact.

**05** Collaborate with Travalyst and other independent NGOs to leverage technology, and data, for good and in support of successful policy outcomes.

# Join us

There is so much we can do when we work together.

If you would like to learn more about how you can collaborate with Travalyst, please get in touch.

Partnerships: [partnerships@travalyst.org](mailto:partnerships@travalyst.org)

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Certifications: [certifications@travalyst.org](mailto:certifications@travalyst.org)

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Media enquiries: [media@travalyst.org](mailto:media@travalyst.org)

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Government & policy: [compliance@travalyst.org](mailto:compliance@travalyst.org)

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Everything else: [info@travalyst.org](mailto:info@travalyst.org)

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To stay up-to-date on our work, you can also [sign up for our newsletter](#) and follow us on [LinkedIn](#).

# References

- 1 Aligned with UN Tourism's Glasgow Declaration for Climate Action in Tourism
- 2 Aligned with UNEP's Kunming-Montreal Global Biodiversity Framework
- 3 Aligned with the United Nations Sustainable Development Goals 8.9 and 12.B
- 4 Source: [The Lancet](#)
- 5 Source: [BCG](#); calculation based on an approximate global population of 8 billion.
- 6 Source: [World Economic Forum](#)
- 7 Source: [Booking.com](#)
- 8 Source: [McKinsey](#); based on estimates that conservation efforts could support 30 million jobs in ecotourism and sustainable fisheries, directly add 650,000 new jobs in conservation management and support \$500 billion of GDP in ecotourism and sustainable fisheries.
- 9 Source: [Booking.com](#)
- 10 Source: YouGov; see methodology for details
- 11 Source: YouGov; see methodology for details
- 12 Source: [Met Office \(UK\)](#)
- 13 Source: YouGov; see methodology for details
- 14 Source: YouGov; see methodology for details
- 15 Source: Travalyst survey; see methodology for details
- 16 Source: Travalyst survey; see methodology for details
- 17 Source: Travalyst survey; see methodology for details
- 18 Source: Travalyst survey; see methodology for details
- 19 The number that Travalyst has aggregated from its partners is estimated from the number of flight searches where the Travel Impact Model (TIM) emissions estimates were surfaced. It is aggregated from data collected between the launch date of the TIM by Google in October 2021 through January 2025. In this time the TIM was scaled through the Travalyst coalition and integrated into partner platforms.
- 20 The number that Travalyst has aggregated from its partners is estimated from the number of flight searches where the Travel Impact Model (TIM) emissions estimates were surfaced. It is aggregated from data collected between the launch date of the TIM by Google in October 2021 through January 2025. In this time the TIM was scaled through the Travalyst coalition and integrated into partner platforms.
- 21 Source: [Booking.com](#)
- 22 Source: [Booking.com](#)
- 23 Source: [UN Tourism](#)
- 24 See the full list of founding signatories [here](#).
- 25 Aligned with UN Tourism's Glasgow Declaration for Climate Action in Tourism
- 26 Aligned with UNEP's Kunming-Montreal Global Biodiversity Framework
- 27 Aligned with the United Nations Sustainable Development Goals 8.9 and 12.B
- 28 Source: [Booking.com](#)
- 29 See the roadmap for the Travel Impact Model [here](#).
- 30 Aligned with UN Tourism's Glasgow Declaration for Climate Action in Tourism
- 31 Aligned with UNEP's Kunming-Montreal Global Biodiversity Framework
- 32 Aligned with the United Nations Sustainable Development Goals 8.9 and 12.B

