

Sustainable Tourism & The Future of Local

Omar Romero

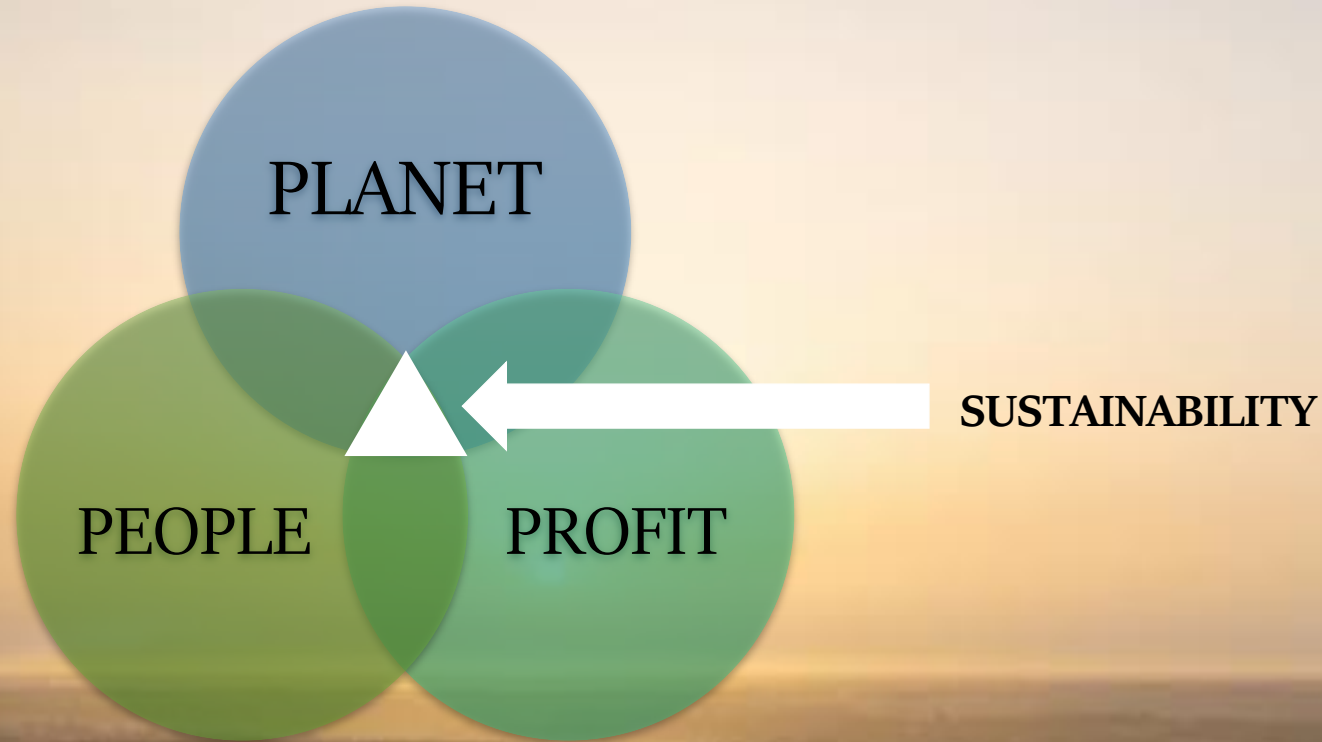
Chief Development & Luxury Officer

MINOR

HOTELS



What is “Sustainable Tourism”?



“We must take a science-based approach to measuring impacts and setting targets, while fostering leadership and innovation in our teams.”

Why “Sustainable Tourism” matters?


ANANTARA
HOTELS & RESORTS

elewana
— COLLECTION —

The WOLSELEY
HOTELS

TIVOLI
HOTELS & RESORTS

MINOR
RESERVE
COLLECTION


NH COLLECTION
HOTELS & RESORTS

nhow
HOTELS & RESORTS

AVANI
Hotels & Resorts

COLBERT
COLLECTION

NH
HOTELS &
RESORTS

OAKS.
Hotels, Resorts & Suites

iStay
Hotels

**“As The World *Embraces*
Sustainability, So Does
The Tourism Industry”**

Skift.MEGA TRENDS

LOOKING AHEAD
TO 2025

From travel industry expert Skift in 2021's notes for travel
Megatrends to 2025:

“Travel's New Cadence Is More Deliberate, Introspective And Soulful”

In a Booking.com global survey of travelers in 2020's summer,

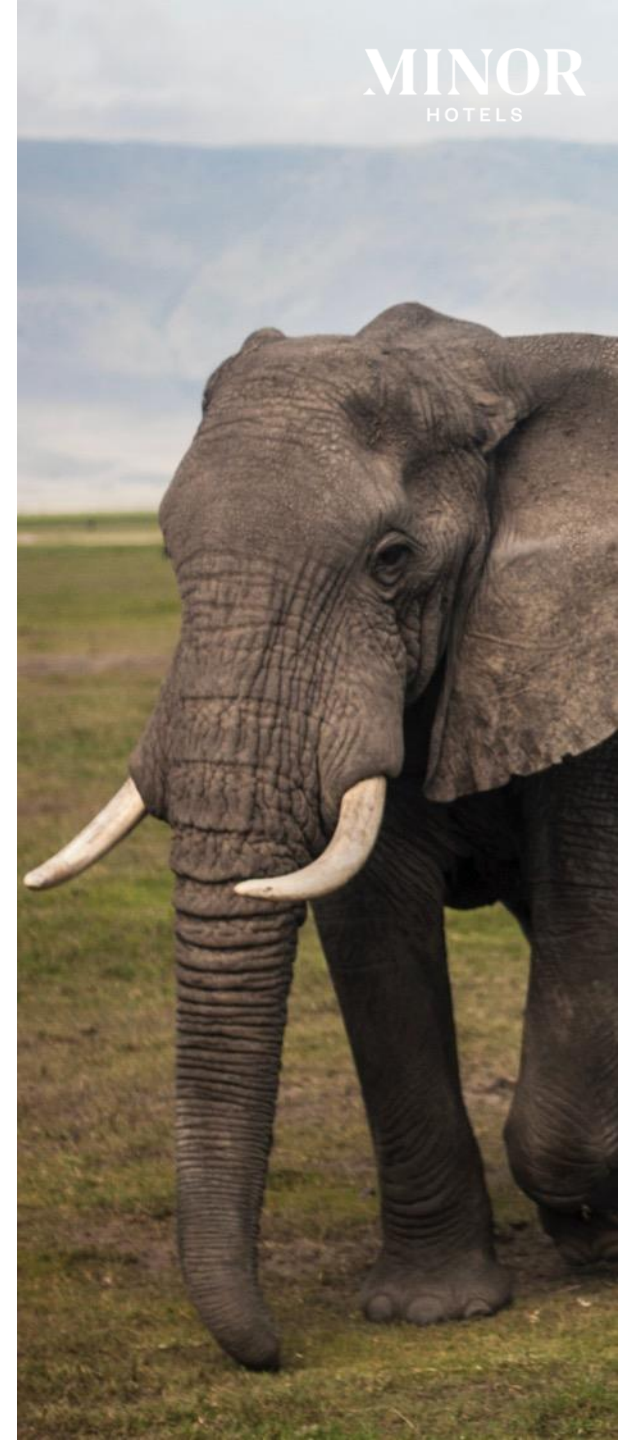
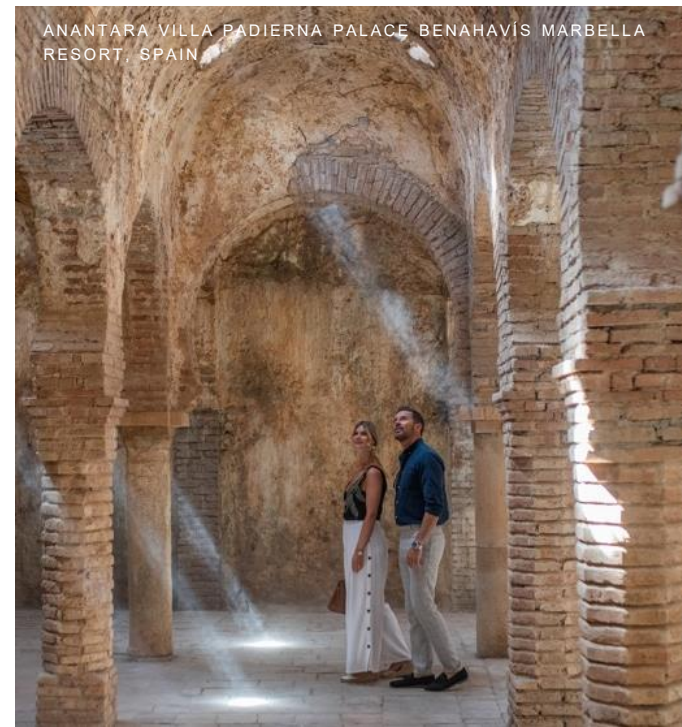
- 60 percent of respondents said they would use an app or website that recommended itineraries where tours would have a positive impact on locals. At the same time,
- 51 percent claimed they would change their chosen travel destination and head instead to a less-popular one if that decision would have less of an adverse environmental impact

“Trends Reveal a Critical Need for More Holistic, Sustainable, and Regenerative Tourism and Events Governance”

The Global Destination Sustainability Index (GDS-Index) has announced its 2024 rankings, revealing the Top 40 most sustainable destinations worldwide. These outstanding locations exemplify a deep commitment to sustainable tourism, successfully balancing tourism development with environmental responsibility and community well-being.

Here are some key highlights:

- Social responsibility is becoming a key pillar of sustainability. Destinations that actively promote community involvement and support local economies are seeing higher scores in the index.
- The 2024 rankings reflect the challenges posed by a more demanding methodology. The GDS-Index introduced 12 new criteria, refined 28 others, and removed five to keep pace with global sustainability demands. As a result, 26 of the Top 40 destinations saw a score decline despite their continued efforts.



Top 40 Destinations of the 2024 GDS-Index vs. 2023 GDS-Index

	2024	2023		2024	2023		2024	2023		2024	2023				
Helsinki*	1	92.43	90.49	Aalborg	11	82.98	87.70	Cork	21	77.18	77.86	Barcelona	31	75.57	74.52
Gothenburg	2	90.83	94.64	Glasgow	12	81.88	87.47	Victoria	22	77.17	66.15	Svendborg	32	75.52	77.06
Copenhagen*	3	88.19	91.73	Zurich	13	81.08	84.35	Tampere	23	76.96	78.33	Brisbane	33	75.23	73.07
Bergen	4	86.49	90.15	Bilbao	14	80.27	78.83	Melbourne	24	76.61	77.53	Songkhla	34	74.89	79.56
Aarhus	5	85.68	88.64	Lyon	15	80.16	82.85	Galway	25	76.06	71.85	Faroe Islands	35	74.88	77.31
Bordeaux	6	83.37	87.10	Goyang	16	78.90	82.66	Berlin*	26	75.92	76.69	Montreal	36	74.54	75.12
Singapore*	7	83.37	81.83	Reykjavik*	17	78.28		Tirol	27	75.80	82.53	Quebec City	37	73.74	64.43
Oslo*	8	83.26	92.46	Middelfart	18	77.80	82.16	Clare	28	75.77	72.01	Limerick	38	73.51	71.39
Belfast*	9	83.14	86.40	Kerry	19	77.65	80.61	Dublin*	29	75.69	63.89	Horsens	39	73.06	62.03
Sydney	10	83.13	77.21	Paris*	20	77.24	80.12	Stockholm*	30	75.57	86.74	Odense	40	72.87	79.94

*Capital Cities

Leaders by Region

Asia-Pacific

1	Singapore	83.37
2	Sydney	83.13
3	Goyang	78.90
4	Melbourne	76.61
5	Brisbane	75.23

Central & Southern Europe

1	Bordeaux	83.37
2	Zurich	81.08
3	Bilbao	80.27
4	Lyon	80.16
5	Paris	77.24

North America

1	Victoria	77.17
2	Montreal	74.54
3	Quebec City	73.74
4	Edmonton	64.54
5	Ottawa	55.98

Northern Europe

1	Helsinki	92.43
2	Göteborg	90.83
3	Copenhagen	88.19
4	Bergen	86.49
5	Aarhus	85.68

A remarkable shift is taking place across the Asia-Pacific region, with several destinations rising into the **Top 40 rankings**—a clear sign of the region's growing focus on sustainable travel. **Singapore** and **Sydney** have emerged as frontrunners in this movement, securing the highest positions in their region and showcasing a strong commitment to advancing sustainable tourism practices.

Balancing The Growth with Sustainability

Sustainable **Tourism**

Trends in *Asia*

As sustainable tourism continues to shape 2025, global travel leaders face a defining challenge — balancing economic growth with environmental responsibility, social inclusion, and the preservation of cultural heritage


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VIEW FROM OAKS SYDNEY GOLDSBROUGH SUITES, AUSTRALIA

Bhutan

Balancing Growth and Preservation

Bhutan's "High Value, Low Volume" model remains one of the world's most ambitious sustainable tourism policies.

The Integrated Tourism Master Plan 2025-2034 targets:

- Enhanced sustainable infrastructure
- Increased tourism revenue without increasing tourist volume
- Diversification into nature-based and cultural tourism

Travelers contribute a daily Sustainable Development Fee (SDF) that funds conservation and cultural projects.



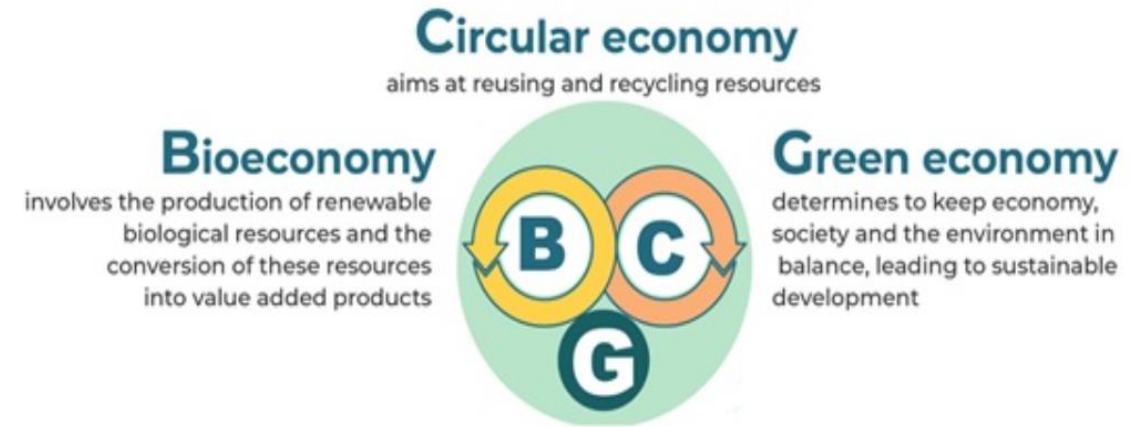
Thailand

Innovating for Sustainability

Thailand is making significant strides toward carbon-neutral tourism, in line with the nation's **Bio-Circular-Green (BCG) Economic Model**.

The Tourism Authority of Thailand (TAT), in collaboration with the Ministry of Higher Education, Science, Research, and Innovation, is driving initiatives that merge digital transformation with science-based solutions to promote sustainable travel. At the Thailand Travel Mart Plus 2025, several key initiatives were showcased, highlighting Thailand's commitment to innovation and sustainability within the tourism sector, including:

- Low-carbon travel packages
- Eco-conscious culinary experiences
- Promotion of off-peak travel to manage flow



VILLAGE TO THE WORLD #SUSTAINABLEAGENDA



The image shows the interior of the Jewel at Changi Airport in Singapore. It features a massive glass and steel dome ceiling that allows natural light to filter through. The walls are covered in dense, multi-level greenery, including various tropical plants and trees. In the center, a large waterfall cascades down into a pool. The floor is a polished, reflective surface. The overall atmosphere is one of a modern, sustainable urban environment.

Sustainable **Cities & Urban Tourism Models**

An aerial photograph of Songdo, South Korea, showcasing a blend of modern architecture and nature. On the left, several tall, glass-clad skyscrapers rise vertically. A wide, multi-lane road runs parallel to the buildings. To the right of the road is a large, lush green park area with winding paths and a river that meanders through it. In the background, a dense urban skyline is visible under a clear blue sky.

Songdo, South Korea

Building a City from Scratch

Songdo was conceptualized in the early years of the 21st century as a completely sustainable, high-tech city, that would plan for a future without cars, without pollution, and without overcrowded spaces



To accomplish these rather lofty goals, some of the world's most advanced urban technologies were utilized.

- The streets that connect the district are lined with sensors that measure energy use and traffic flow as a means of quantifying sustainability to support its highest concentration of LEED-certified projects in the world.
- Songdo also features a massive seaside park outfitted with self-sustaining irrigation systems to provide ample public space.
- At the level of individual residents, trash tubes take garbage away to a central plant where it is automatically sorted into recyclables and waste to be burned. Even homes are operated by cellphone apps that control everything from heating and air conditioning, to artificial light levels.



Key Sustainable & Urban-Tourism-Relevant Features

Feature	What's Done / Implemented	Relevance to Urban Tourism / Sustainable Urbanism
Green & Blue Infrastructure / Open Space	~40% of the area is designated open and green space. Includes Songdo Central Park (~41 hectares / ~101 acres) as a major anchor. Canals & walk-/bike paths. Blue infrastructure (e.g. seawater canals, water features).	These make the city more attractive for residents and visitors. Parks, green and blue spaces are major assets for tourism (recreation, photo spots, events). They help with microclimate, aesthetic appeal, and health.
Smart / High-Tech Infrastructure	U-life services: U-culture, U-transport, U-government, etc.; built-in sensors; connected infrastructure; energy efficiency; use of LEED standards for buildings; pneumatic waste collection system (waste sucked underground rather than trucks).	These draw interest in themselves (smart city tours; architectural interest), reduce environmental impacts of tourism/residents, can improve the visitor experience (cleaner, well-managed, less congestion, etc.).
Transportation / Mobility	Bike paths (~25 km), walkability in certain districts, public transit connections (bus, Incheon Metro, link to airport via Incheon Bridge) etc.	Helps sustainable travel, reduces car dependency, makes exploring easier. Tourists prefer ease of movement; lower emissions from transport helps environmental sustainability.
Sustainability Certifications / Building Standards	Many LEED-certified buildings; LEED ND (Neighborhood Development) pilot participation. Buildings designed using sustainable materials, energy efficiency, greywater / stormwater reuse etc.	Supports reducing operational emissions, can be marketing points for eco-conscious tourists, and helps long-term environmental sustainability.
Amenities & Infrastructure for Tourism / Business Guests	Convention center (Songdo Convensia), international hotels (e.g., Sheraton Grand Incheon), parks, canals, mixed-use retail (e.g. Canal Walk).	These give the city something for visitors to do beyond the usual; they support business tourism. Mixed uses (restaurants / shops / green areas) add to liveliness.

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WILLIAM E. HEINECKE
Founder & Chairman – Minor International

Minor International

Minor Hotels is part of publicly listed Minor International (MINT) – one of the largest hospitality and leisure companies in the world. MINT is also well known for its international retail and lifestyle brands, and its subsidiary, Minor Food Group, is one of world's largest restaurant companies with more than 3,000 outlets in 20 countries.



560+
HOTELS



80,000+
GUEST ROOMS



3,000+
RESTAURANTS



300+
RETAIL OUTLETS



50+
BRANDS



30m+
LOYALTY MEMBERS



A World of Hospitality

60+ COUNTRIES
560+ HOTELS
80,000+ ROOMS



Asia, Middle East & Africa

113 HOTELS
19,000 ROOMS



Australia & New Zealand

69 HOTELS
7,500 ROOMS



Europe & Americas

349 HOTELS
55,000 ROOMS

Hotel Brands That Matter

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The WOLSELEY
HOTELS

TIVOLI
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PREMIUM


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Minor Hotels Approach to Sustainability



Minor Sustainability Strategy

Our Vision

To be a leader in delivering sustainable performance that positively impact stakeholders and the environment

Our Commitments

People Potential

Capabilities & Inclusion; Health, Safety & Well-being; Communities

Natural Capital

Net zero, climate resiliency, and biodiversity

Responsible Business

Transparency, governance, and sustainable supply chain

Our Impacts

Our Operations

Our Stakeholders

Our Planet

People Potential

Key Focus:

Strengthen **Capabilities and Inclusion**

Enhance **Safety, Health & Well-being**

Empower **Communities**



Our People

- Training & development
- Health, safety & well-being
- Labor practice and inclusion



Children & Youth

- Education support
- Career opportunity and development

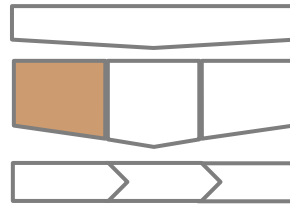


Our Communities

- Community empowerment & support
- Engagement & volunteer activities

Minor's Commitment

- 3 million people developed and supported by 2030
- 60% of Minor Corporate University (MCU) program graduates return to work with Minor by 2025
- 50% internal promotion of management levels each year
- Zero annual work-related fatality of employees



Natural Capital

Key Focus:

Support **Net Zero** Transition

Increase **Climate Resiliency**

Protect **Natural Capital**



Managing Environmental Impact

- Net Zero emissions by 2050
- Energy efficiency and GHG reduction
- Water efficiency
- Waste management – reduce, reuse, recycle

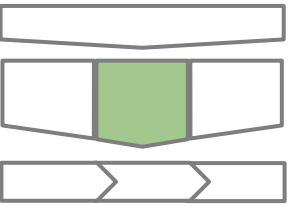
Biodiversity Protection

- Property-level biodiversity protection
- Conservation initiatives and support – engage with experts and stakeholders



Minor's Commitment

- Achieve Net Zero emissions by 2050
- 15% reduction in MH energy and carbon intensity per rooms sold (baseline 2019) by 2025
- 10% reduction in MH water intensity per rooms sold (baseline 2022) by 2025
- 50% Reduction in MH organic waste to landfill intensity by 50% (baseline 2021) by 2030
- 5% Reduction in MF Thailand electricity consumption per store by 2025 (baseline 2023)



Responsible Business

Key Focus:

Ensure Transparency & Good Governance

Accelerate Sustainable Investment

Promote Sustainable Supply Chain



Local & Ethical Sourcing and Sustainable Supply Chain

- Local sourcing/ on-site harvest
- Cage-free eggs commitment
- Sustainable seafood
- Single-use plastic minimization
- Supplier due diligence

Good governance & Human Rights

- Human Rights
- Code of Conduct
- Information/ data security and privacy



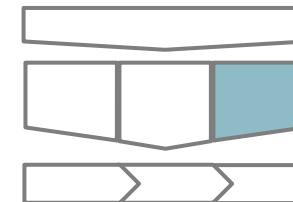
Customer Engagement

- Customer experience enhancement
- Customer health & well-being



Minor's Commitment

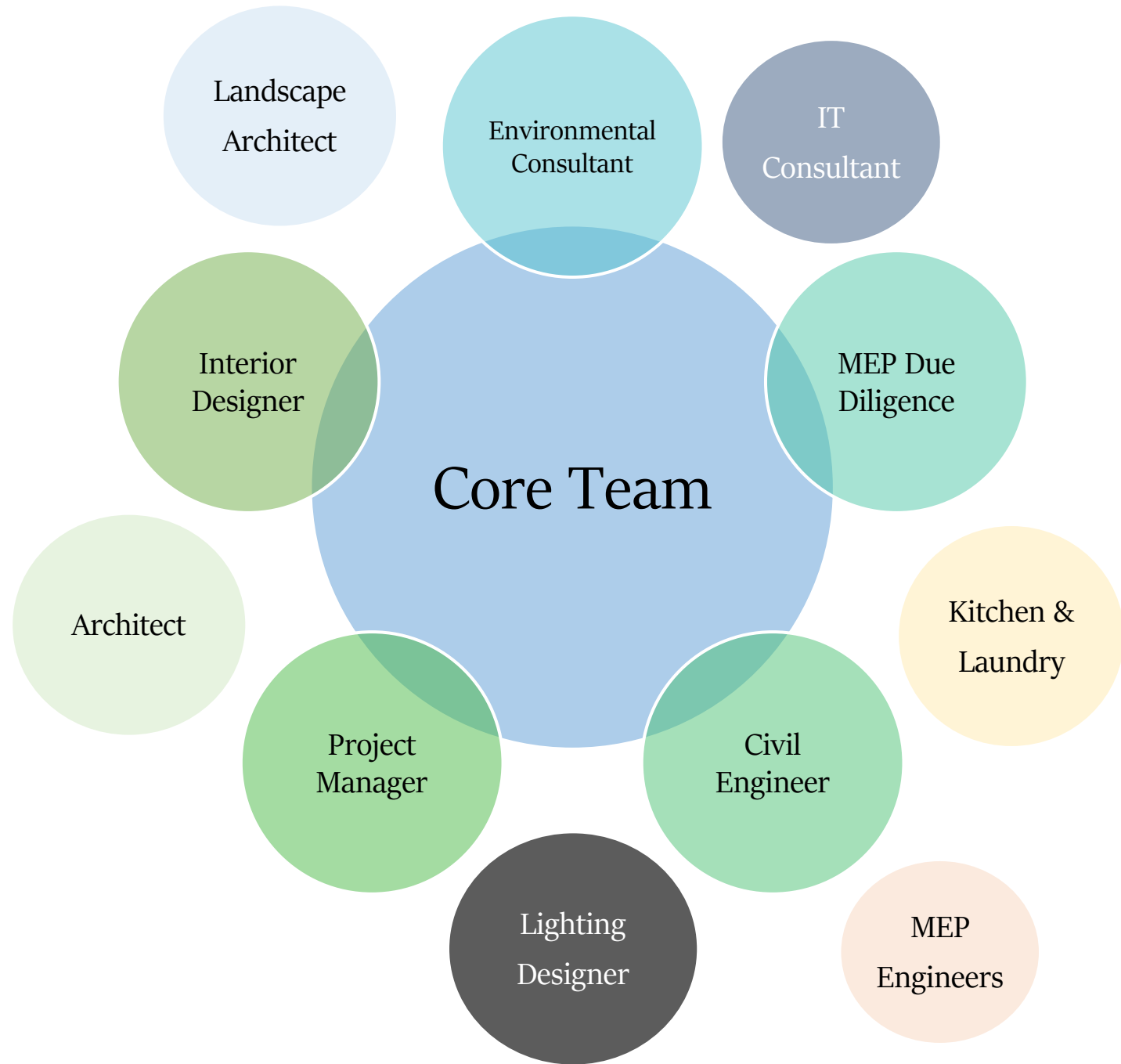
- Group-wide NPS score of 62 by 2025
- 100% of employees trained on Human Rights by 2025
- 100% due diligence of new SCM's Thai suppliers in 2025
- Maintain annual "Excellent" CG scoring from Thai IOD's CG Report of Thai Listed Companies



Frameworks for Sustainable Tourism

Sustainability

Starts With A Team



ANANTARA NEW YORK PALACE BUDAPEST HOTEL, HUNGARY

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Sustainability In Practices at

MINOR Hotels



ANANTARA VILLA PADIERNA PALACE BENAHAVIS MARBELLA RESORT, SPAIN



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Sustainability In Design

Green Building Standards

- Sustainable materials: The use of locally sourced and environmentally friendly construction materials (such as reclaimed wood, bamboo, or recycled metal) is prioritized.
- Passive design: Hotels are often built with design elements that minimize energy use, such as natural lighting, cross-ventilation, and thermal insulation that reduces reliance on artificial heating and cooling.

Biophilic Design

Integrates natural elements into the building structure. For example, large windows to bring in natural light, gardens, green roofs, and vertical gardens are used to create spaces that promote well-being and minimize environmental impact.



TIVOLI MARINA VILAMOURA ALGARVE RESORT, PORTUGAL



Anantara Mina Ras Al Khaimah

Anantara Mina Ras Al Khaimah stands as an emblem of environmental leadership and achievement, further elevating its reputation in sustainable hospitality. The resort is set to achieve LEED Gold certification for 2024, one of the world's most respected and widely used green building rating standards. By seamlessly integrating sustainable practices into every facet of its operations, Anantara Al Mina not only conserves resources but also provides a healthier, more enriching environment for guests—making it the preferred choice for discerning travellers seeking both opulence and environmental responsibility.





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Energy Efficiency

- **Energy-efficient technology:** Many of Minor's properties have adopted energy-saving systems such as LED lighting, motion-sensor lighting in public areas, and energy-efficient air conditioning systems
- **Renewable energy:** Some of Minor Hotels' properties are actively integrating renewable energy sources, such as solar panels, to reduce reliance on fossil fuels. For instance, several Anantara and Avani locations have installed solar panels to support their operational energy needs. Additionally, select properties are introducing EV chargers, encouraging sustainable transportation for guests and further reducing their carbon footprint.



TIVOLI MOFARREJ SÃO PAULO, BRAZIL

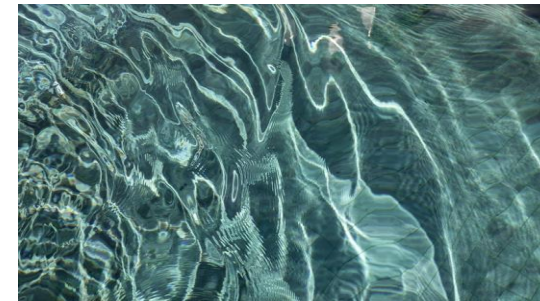
In 2024, The hotel successfully implemented a heat recovery system to maintain the pool water at 30°C, utilizing residual heat from the existing boiler system. This system employs two distinct heat exchangers to optimize energy efficiency. The first heat exchanger, installed in 2019, uses waste heat from the chiller to heat the water in the reservoirs (boilers). The second heat exchanger, recently installed, transfers heat from the reservoirs to the pool water, ensuring a safe and indirect heat exchange method. This cost-effective and highly energy-efficient solution is particularly effective in winter, ensuring enhanced thermal control and maintaining the required minimum in the hot water reservoirs. This initiative is expected to save more than 31,000 kWh annually.

Sustainability In Operation

Water Efficiency

Water usage is a critical issue in the hospitality industry, and Minor Hotels has implemented several water-saving initiatives:

- **Low-flow fixtures:** Installation of low-flow showerheads, faucets, and toilets to reduce water consumption in guest rooms and public areas.
- **Rainwater harvesting:** Some properties have integrated rainwater harvesting systems to supply water for non-potable uses like irrigation and landscaping.
- **Water recycling systems:** In select locations, Minor Hotels has adopted water recycling systems to treat and reuse water for landscaping or other non-consumable purposes.

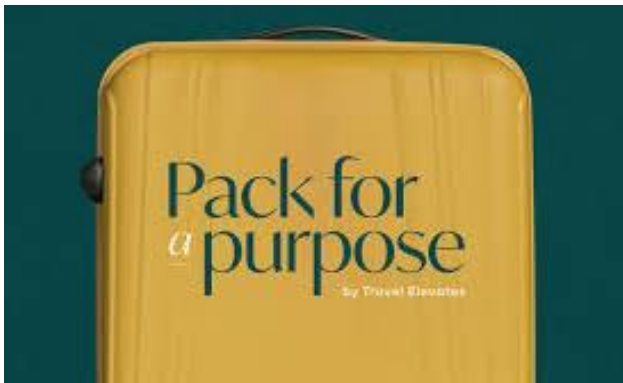


Sustainability In Operation

Pack For A Purpose

With a philosophy of 'Small Space. Little Effort. Big Impact.', the Pack for a Purpose initiative encourages travellers to make a lasting impact in the communities at their travel destination by bringing supplies with them to donate to the local schools or medical clinics in need.

The Royal Livingstone by Anantara and Avani Victoria Falls Resort, Zambia rt have a bond with the Linda Community School and its pupils. The hotel supports the children's academic, cultural, entrepreneurial and environmental education.



Waste Management

- **Waste segregation and recycling:** Most Minor Hotels brands, including Anantara and Avani, have introduced waste management systems where organic waste is separated from recyclables and non-recyclables. In some properties, food waste is composted or sent to local farms.
- **Zero waste initiatives:** Certain hotels in the Anantara brand aim to achieve "zero waste" status, meaning they are working to send as little waste to landfills as possible by reducing, reusing, and recycling materials
- **Packaging reduction:** In response to growing concerns over plastic waste, Minor Hotels has reduced the use of single-use plastic packaging in favor of reusable or biodegradable alternatives. For example, many properties have moved to eco-friendly toiletries and offer guests reusable water bottles.





Sustainable Dining

Farm-to-table dining

Many Anantara resorts and Avani properties offer farm-to-table dining experiences where ingredients are sourced from local, organic farms. This not only reduces the environmental impact of food transportation but also supports local agriculture.



Sustainability In Guest Experiences

◀ The Bee's Bounty at Anantara Golden Triangle Elephant Camp & Resort, Thailand

Our chefs infuse sustainably sourced, freshly harvested honey into an array of delectable desserts and culinary creations across all venues and menus. Savored by our discerning guests at breakfast and beyond, this exceptional honey hails from our resort's own apiary, nurtured amidst the lush embrace of jungle flora. Each drop embodies nature's bounty, unparalleled in sweetness, while also standing as a timeless symbol of sustainability, as the only food on Earth that never perishes.



Sustainability In Guest Experiences



Eco-Friendly Activities

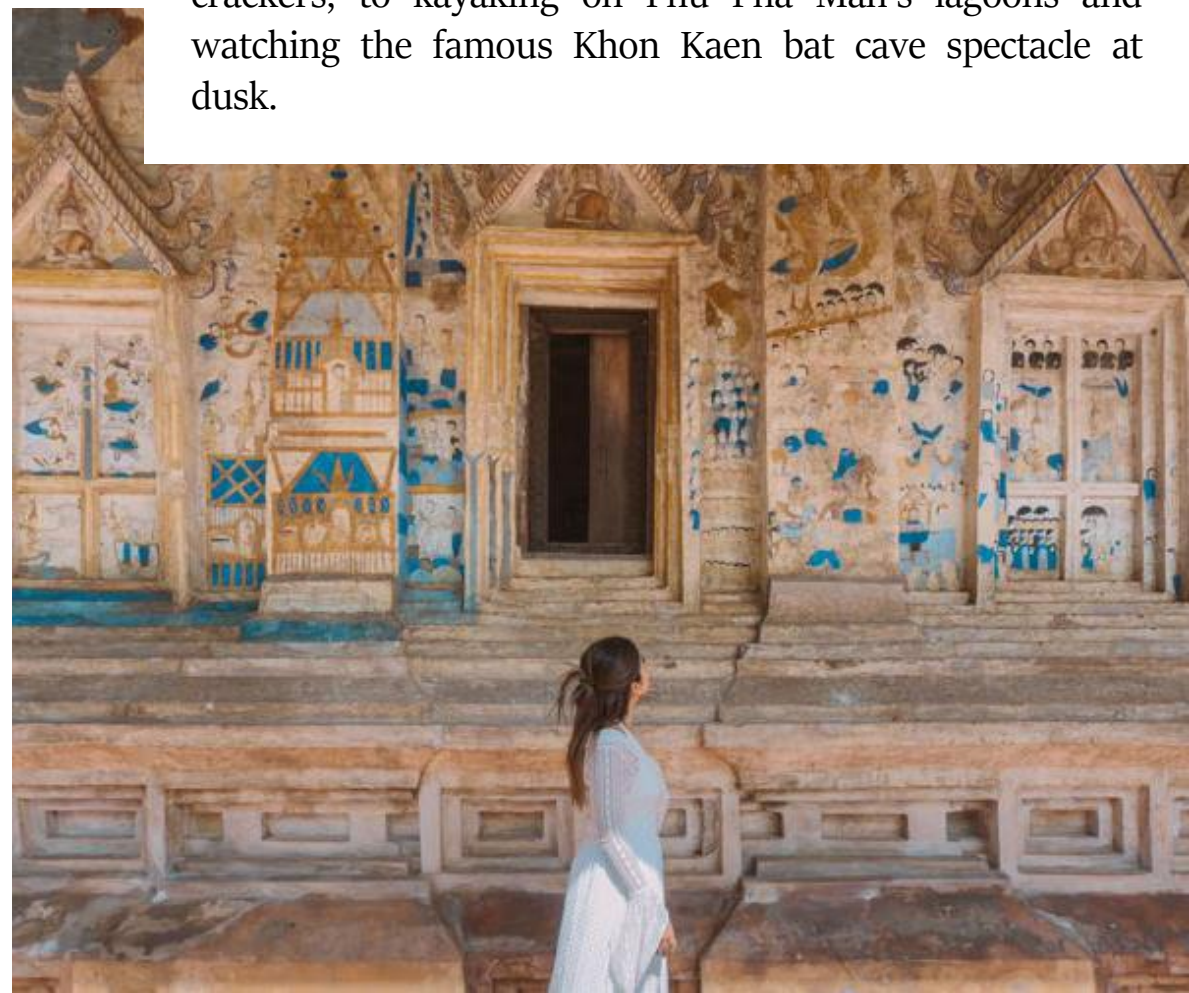
- Many Anantara resorts offer sustainable travel experiences, such as eco-tourism activities (e.g., nature walks, wildlife conservation projects, coral reef restoration programs) that allow guests to engage with the environment in a meaningful way while minimizing impact.
- **Community involvement:** Minor Hotels often partners with local communities for sustainability-focused activities, such as cultural immersion experiences that emphasize local traditions and sustainable lifestyles.





At NH Maldives Kuda Rah, sustainability is at the heart of our diving experiences. Located within a Marine Protected Area, our dive programs promote responsible tourism through eco-friendly diving practices, marine education, and conservation efforts. Divers are encouraged to participate in initiatives like coral restoration and turtle adoption programs, ensuring that future generations can continue to experience the wonders of these waters. By diving responsibly, we help protect the fragile marine ecosystems that make South Ari Atoll a world-renowned diving destination.

Avani Khon Kaen Hotel & Convention Centre, Thailand, has launched Isaan Encounters, a curated collection of Khon Kaen tours and activities showcasing the culture, cuisine, and nature of Thailand's Northeast. Travellers can now join immersive local experiences ranging from exploring the colourful village murals of Ban Sawathi and learning to make traditional Isaan rice crackers, to kayaking on Phu Pha Man's lagoons and watching the famous Khon Kaen bat cave spectacle at dusk.



Sustainability In Guest Experiences

Guest Education

Minor Hotels actively educates its guests about its sustainability practices and encourages them to participate in eco-friendly behaviors during their stay. This can include

- Providing information in rooms about water and energy conservation.
- Offering incentives for guests who opt out of daily towel changes or who choose to reuse their linens.
- Providing reusable bags, water bottles, and eco-friendly toiletries.



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Sustainability Fund

“Dollars For Deeds”

- The ‘Dollars for Deeds’ program invites guests to combine their stay with opportunities to support a range of good deeds that help local communities and the environment. Whether it’s rescuing street elephants in Thailand, coral rejuvenation in the Maldives, or giving children the chance for a better life in Hungary, we are dedicated to protecting the environment and supporting local communities wherever we call home.
- As part of this initiative, we invite guests to contribute USD 1* for every night stayed. We will then match that amount and use the proceeds to support a diverse range of sustainability and environmental projects around the world.



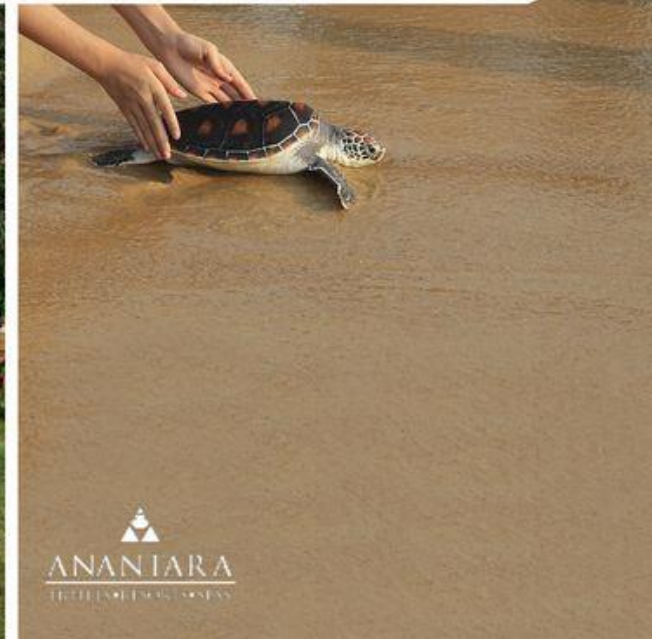
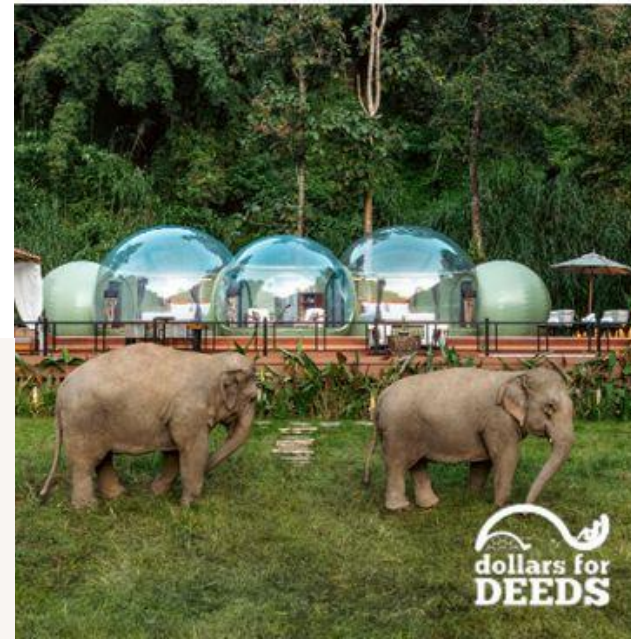
You donate USD 1 for
each night you stay *



We match that amount



Proceeds support
sustainability projects
worldwide



Biodiversity Conservation Initiatives

Land & Life Foundation is a collaborative effort of the Elewana Collection, Cheli & Peacock Safaris, the Golden Triangle Asian Elephant Foundation, and Minor International. It promotes sustainable community-wildlife coexistence in Kenya and Tanzania. They focus on Planet, People, and Partnerships to achieve environmental conservation and community wellbeing.

ELEWANA ELEPHANT PEPPER CAMP MASAI MARA, KENYA

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The Mai Khao Marine Turtle Foundation in Thailand is committed to protecting the marine and coastal environment and eco systems for the wellbeing of the sea turtles that next in the Sirinath National Marine Park and the surrounding areas.



ELEWANA TORTILIS CAMP AMBOSELI, KENYA





“Local”
Is The New
Global



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Q&A



Thank you