Manual

Travel Emissions Tracker

The tracker for measuring, visualising and monitoring KPIs for climate-friendly product development

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1. Introduction to the Travel Emissions Tracker

The Travel Emissions Tracker is an Excel-based analysis and decision-making tool that helps you, as a tour operator, to record and analyse the CO_2e emissions of your trips and plan targeted measures to reduce them. This tool enables you to keep track of the climate impact of your trips whilst taking economic indicators into account, so you can make informed decisions to create a more climate-friendly travel portfolio. This guide provides a step-by-step explanation of how to use the Tracker.

1.1 How it works

The Travel Emissions Tracker offers you a clear and simple structure for recording and assessing the climate impact of your portfolio in three steps:

- **Enter data and add emissions:** Using the tool's data table, you can easily enter your own travel data yourself, thereby creating a solid foundation for informed analyses. Thanks to the integration of KlimaLink, CO_2e data for your trips can be inserted directly into the table, giving you a comprehensive overview of the emissions generated. Key Performance Indicators (KPIs) are automatically calculated from this data, providing insights into the current status of your product portfolio's emissions.
- **Visualisation and analysis of Key Performance Indicators (KPIs):** The calculated KPIs are then visualised via the dashboard in the Travel Emissions Tracker. The dashboard enables the analysis of emissions from individual trips as well as the entire product portfolio, with the KPIs being considered in conjunction with economic metrics. The visualisation simplifies complex relationships and provides key insights at a glance.
- **Prioritisation and action planning:** The Travel Emissions Tracker also helps you assess the emissions of individual products as well as those of destinations/clusters. The Tracker uses a colour-coded system to show you which products are classified as low-emission (green), medium (yellow) or high (red). This visualisation makes it easy for you to quickly identify which products are particularly harmful to the climate and for which products you should take action to reduce CO_2e emissions.

The Tracker is designed to work with historical data. Furthermore, it operates on two levels – a management level and a product management level. The precise breakdown is explained in Chapter 3.

Working with the tracker can be made even simpler. If necessary, you can also have the data automatically extracted from your own product management system and then enter it into the tracker via copy-paste. There is also a general guide to the tracker´s methodology (to be obtained from the Futouris team via info@futouris.org) for the IT team to develop the tool, so that the entire analysis process can be integrated into your system and thus run automatically.

1.2 Disclaimer regarding use

1. The Travel Emission Tracker is not intended for external communication of your own CO_2e emissions to the public. However, the emissions data from KlimaLink can (and should) of course be used for external communication. For further information, see http://www.klimalink.org

2. The KPIs presented here do not claim to be exhaustive. The focus is on climate-related aspects; other aspects of sustainability are excluded.

3. The Tracker is not designed to enable tour operators to compare themselves with one another. As the Tracker is customised by each tour operator and different aspects and service components are factored into the CO_2e calculation, the results are not comparable with one another. Comparability is only possible for the annual monitoring of a single tour operator or individual product areas.

1.3 Installation and setup

To use the Travel Emissions Tracker, please note the following instructions.

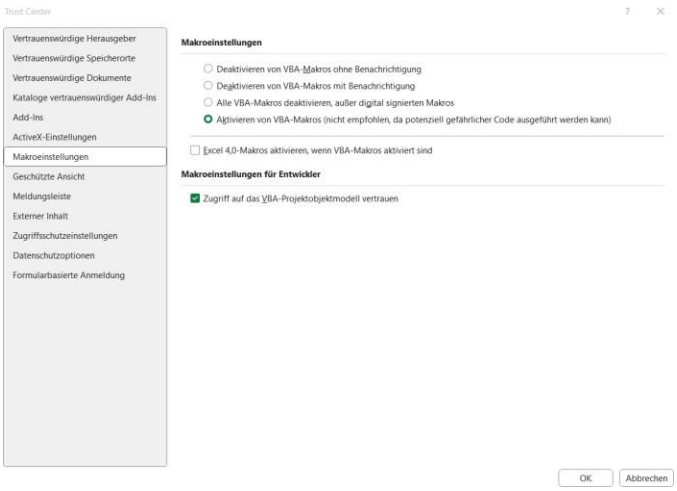
1. Saving the file

The tracker must be saved as a local file on the desktop.

2. Enabling macros in Excel

The tracker uses macros (VBA code). To ensure that these run correctly and that the tracker functions as intended, the relevant security settings must be configured.

To do this, please go to the menu: *File→ Options→ Trust Centre → Trust Centre settings*.

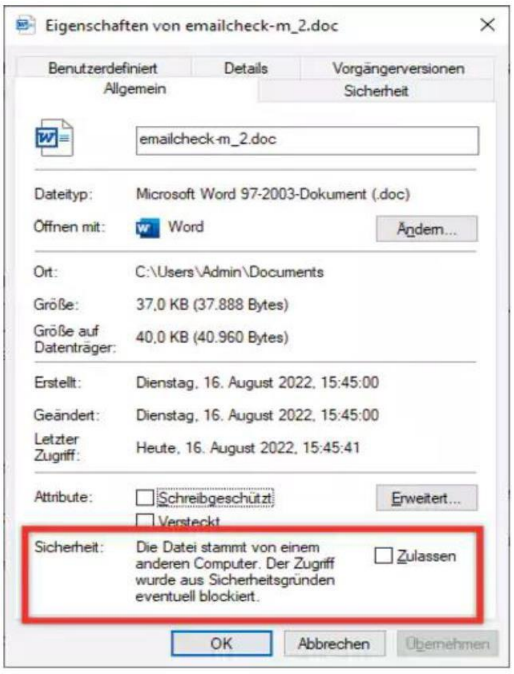


In the Trust Centre, under the 'Macro settings' menu item, select the 'Enable *all* macros' option and ensure that the box next to 'Trust *access to the VBA project model*'.

3. Unblock VBA code in files (on Windows 11)

Microsoft's security policy blocks files containing VBA code that have been sent via the internet on Windows 11.

To unblock macros in a file, such as one downloaded from the internet or attached to an email, uncheck the 'Web' option on your local device. To do this, right-click on the Travel Emissions Tracker file on your desktop, select 'Properties', and then, on the 'General' tab, tick the security checkbox (at the very bottom) 'This file comes from another computer. Access may have been blocked for security reasons"→ Tick the 'Allow' box and select 'OK'.



2. Key Performance Indicators (KPIs) in the Tracker

The Tracker measures and displays three Key Performance Indicators (KPIs) to measure and visualise individual products. In addition, information on key figures for the entire product portfolio is provided. Key Performance Indicators are metrics that indicate the success or progress of a company, project or specific activity. KPIs are used to monitor and evaluate performance in relation to strategic objectives.

KPI 1:  **= CO_2e in kg per PAX per day**

This KPI measures the average CO_2e emissions[1] per day of holiday spent per passenger. This is an important indicator of the environmental impact caused by a tour operator for each day of a holiday sold to a passenger on a trip. The value is determined by calculating the total CO_2e emissions (based on KlimaLink calculations for the available service components) and dividing this by the duration (number of days) of the trip per person. This metric helps to understand a trip's environmental footprint and to directly compare trips of different durations.

KPI 2:  **= Total CO_2e in kg per PAX**

This KPI measures the average CO_2e emissions per passenger on the trip. This metric provides insight into how much CO_2e is generated by an individual guest's travel behaviour during their trip. By analysing this metric, tour operators can take targeted measures to improve the CO_2e footprint per passenger.

KPI 3:  **= Total CO_2e in kg per product/trip**

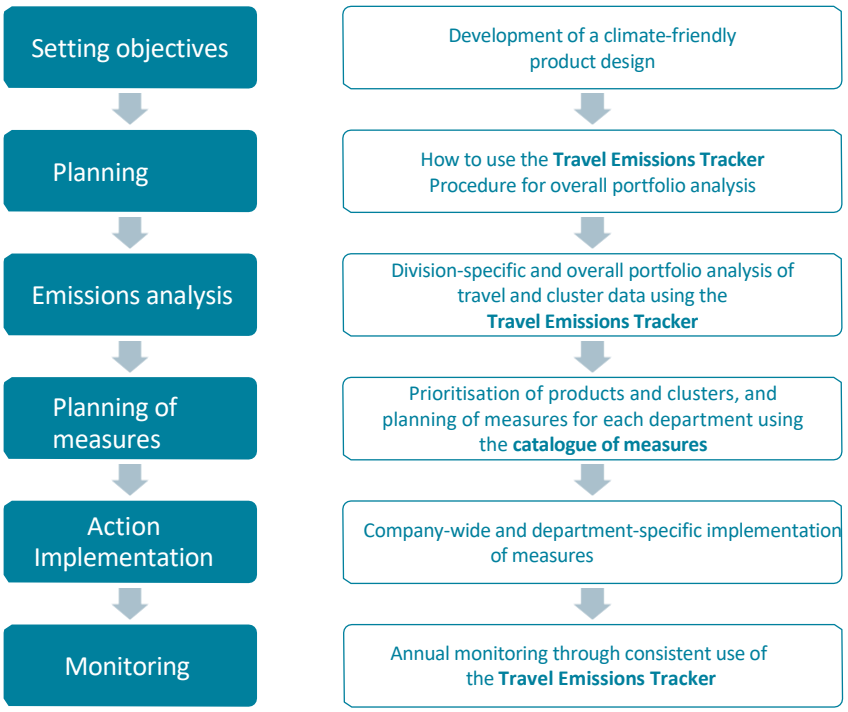
This KPI encompasses all emissions generated throughout the entire travel process of travellers (across all passengers per unit of time in the analysis, e.g. over the course of a year). By calculating the total CO_2e emissions per product/trip, tour operators can gain a comprehensive overview of the environmental footprint of the holiday packages they sell. This enables them to analyse the impact of their trips based on the frequency of bookings or trips undertaken, and to develop strategies for reducing total CO_2e emissions.

[1] CO_2 equivalents, which take into account other greenhouse gas emissions or climate impacts

3. The emissions management process using the Tracker

To successfully assess and improve the climate impact of your products, it is advisable to integrate the use of the Tracker into a company-wide management process. The emissions management process is outlined below, covering both the overarching process steps and the specific, practical steps for climate-friendly product design.

Steps in the emissions management process:



The management process for climate-friendly product design begins with the objective of developing a more climate-friendly orientation for your product portfolio. The next step involves careful planning, which takes into account both how to use the Travel Emissions Tracker and the approach to the overall portfolio analysis.

For the emissions analysis, the Travel Emissions Tracker is used to analyse both division-specific and company-wide travel data, as well as data for grouped destinations (known as 'clusters'), in order to obtain a comprehensive picture of your portfolio's current climate impact. Building on this, action planning takes place, during which products and clusters are prioritised based on the analysis carried out using the Tracker, and targeted measures for each department are planned using the catalogue of measures.

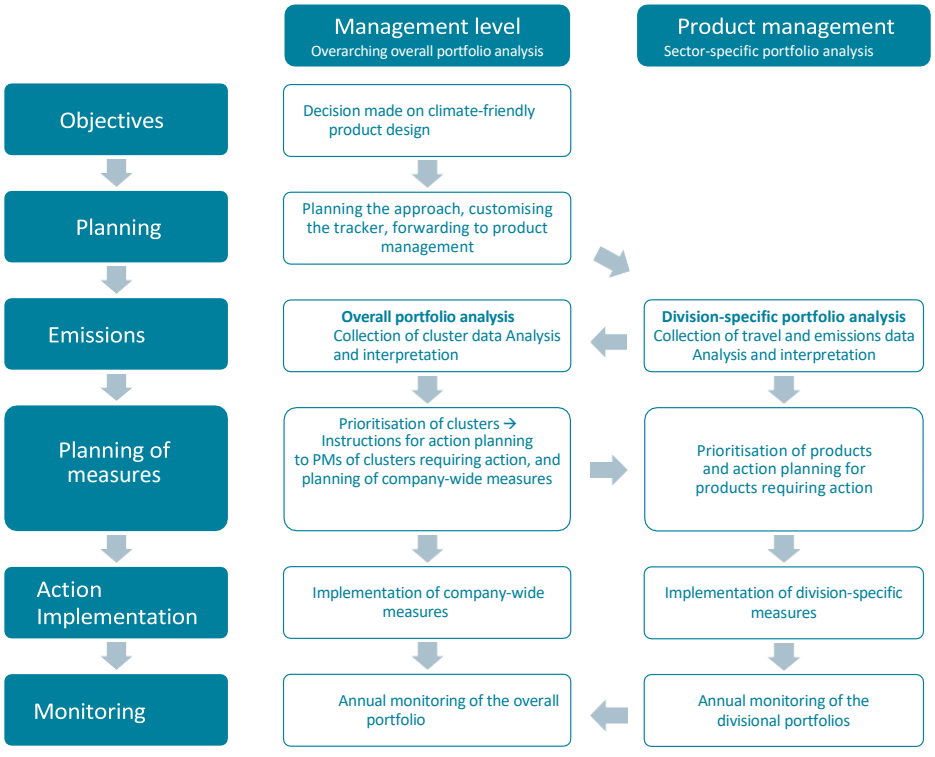
Measures are implemented both at company level and on a department-specific basis to ensure that the planned improvements are effectively realised. Finally, the success of the implemented measures is reviewed through annual monitoring based on the continuous use of the Travel Emissions Tracker. In this way, the climate impact of your company's product portfolio can be continuously optimised.

A two-tier management process

Within the company, the process essentially operates on two levels: senior management and product management. Senior management is responsible for the overarching analysis of the entire portfolio, as well as for planning and implementing company-wide measures. However, senior management relies on input from product management, which carries out the specific portfolio analyses for the individual departments. These analyses are forwarded to senior management, which consolidates them into an overall portfolio analysis.

The next step involves prioritisation at both levels: both senior management and product management identify products or clusters requiring action in the tracker and plan appropriate measures to improve the climate footprint. Furthermore, product management is involved in a feedback process in which senior management prioritises the clusters identified as requiring action during the overall portfolio analysis for the implementation of measures. The success of these measures can ultimately be assessed as part of the annual monitoring of emissions data using the tracker.

Steps in the emissions management process for the two levels:



In smaller companies with few or no sub-departments, such a division into two levels may not be necessary. Chapter 4 describes the approach for senior management in detail, whilst Chapter 5 deals in detail with the processes of product management.

4. Procedure for senior management

4.1 Step-by-step overview

To help you, as a company director, use the Tracker, you will find here a comprehensive overview of the management process workflows and all relevant information. Depending on the size and structure of your company, there are various ways in which the Tracker can be used. A key objective when working with the Travel Emissions Tracker is to record, assess and continuously optimise the climate impact of your entire portfolio. The following overview provides a concise summary of the necessary steps for senior management, whilst detailed explanations are provided in the subsequent sub-sections.

Workflow for senior management when using the tracker:

Objectives		
Planning		
1.	Plan the procedure for the overall portfolio analysis	Chapter 4.2
2.	Customising the tracker ('Input form' tab)	Chapter 4.3
3.	Forwarding to Product Management (PM) • PM briefing • Forwarding the tracker file to individual PMs	Chapter 4.2
Data collection by Product Management		Chapter 5
Emissions analysis: overall portfolio		
4.	Collection of cluster data (provided by PM) • Compilation of total rows or tracker versions per PM or per cluster • Creation of an overall portfolio version of the tracker by entering the total rows (the 'Data Maintenance' tab)	Chapter 4.2
5.	Analysis and interpretation (the 'Overall Portfolio Dashboard' tab and, additionally, the 'Cluster Dashboard')	Chapter 4.4
Action planning		
6.	Prioritisation of clusters → Feedback to individual PMs for further prioritisation of selected clusters	Chapter 6
7.	Planning company-wide measures using the catalogue of measures	
Implementation of measures (independently of the tracker)		
Monitoring		
8.	Annual monitoring of the entire portfolio through regular use of the tracker	Chapter 7

Ideally, you should carry out steps 1 to 3 once, before using the tracker for the very first time. For annual monitoring, the procedure for analysing the entire portfolio should always be the same. You may need to make minor adjustments at the start until you are satisfied with the procedure. All subsequent steps are then carried out annually or at whatever intervals you deem appropriate for monitoring. Step 4 is expected to be significantly simplified in the next version of the tracker.

4.2 Carrying out the overall portfolio analysis

4.2.1 Planning the procedure for the overall portfolio analysis

Before you carry out the overall portfolio analysis of the emissions from all your company's products using the Travel Emissions Tracker, some basic strategic considerations are required. These depend largely on what type of tour operator you are (specialist or high-volume operator) and how many trips you have in your portfolio. These factors influence both the breakdown (referred to here collectively as 'clustering') of your portfolio for use with the Tracker and the way in which the products are recorded in the Tracker.

Portfolio clustering:

- To analyse your entire portfolio, it is advisable to divide it into different clusters. This division can be based on destinations, regions, themes (e.g. types of holiday) or other relevant criteria.
- You may already have an existing structure for your portfolio, for example by destination or some other type of clustering. In this case, you should check in advance whether this breakdown is already suitable for the overall portfolio analysis. As a general rule, the more extensive your company's range of travel options, the more detailed the breakdown of trips into different clusters should be.
- The project managers (PMs) create a separate tracker file for each cluster, into which the relevant trip data is transferred. You (or the PMs) will find the instructions for data entry in Chapter 5. Once data entry is complete, you will receive the tracker files back and use them to create your own version for the overall portfolio analysis by transferring the total rows from the individual data tables into your tracker file. *Note:* This stage of the data transfer process can also be automated within the organisation (IT/Data Management/Controlling) through process adjustments, so that your tracker file is automatically (or at the click of a button) populated with the summary data from the individual clusters as soon as the PMs have finished entering the data.

Recording products in the Tracker ('Data Collection' tab):

- The Tracker is primarily used to process and analyse historical data.
- Although product management is usually responsible for data entry, you must define a clear, overarching procedure for how data is to be entered and structured in the Tracker.
- Each row in the 'Data Maintenance' tab represents a travel product (not a travel order). It may therefore be necessary to group together several travel orders that span a longer period. Should data import be automated in the future, or under other circumstances, individual travel orders can of course also be recorded.
- For each trip on offer, the key performance indicators for the selected period – whether the last year or the previous season – should be recorded. Particularly relevant here are the total number of guests, financial key figures such as margin or profit contribution (as a percentage), as well as turnover (in euros) and, of course, the booking data. These columns are highlighted in red in the data collection section to indicate they are mandatory fields and are therefore also visible to the PM as mandatory entries.
- The following trip data types can be entered into the tracker, each supplemented with financial and climate data:
    - Historical actual data including a projection of passenger numbers
    - Planned data, including a projection of passenger numbers
    - Fictitious travel options including a projection of passenger numbers
    - Real-time data at the time of booking, which is imported automatically

Once the clusters have been defined and the method of data entry specified, you should document this procedure and forward it later in the briefing to the product managers (PMs). First, however, you can adapt the tracker to your company's specific needs and customise it.

4.2.2 Customising the tracker (the 'Input form' tab)

Before you pass the tracker on to your product managers, it is important to configure a few basic settings. This includes specifying the key performance indicator (KPI) to be used in all versions of the tracker, as well as the option to define your own thresholds for evaluating products. You'll find the exact procedure for adjusting these settings in Chapter 4.3. Only once you've completed these adjustments should you proceed to the next step (Chapter 4.2.3) – forwarding the tracker, including the briefing, to the PM. Essentially, these adjustments only need to be made once and can – or should – be kept constant in subsequent years for monitoring purposes. However, it is of course possible, for example, to 'tighten' the thresholds for evaluating and categorising trips in future.

********** **Quick jump to Chapter 4.3 and then back here** *********

4.2.3 Forwarding to Product Management

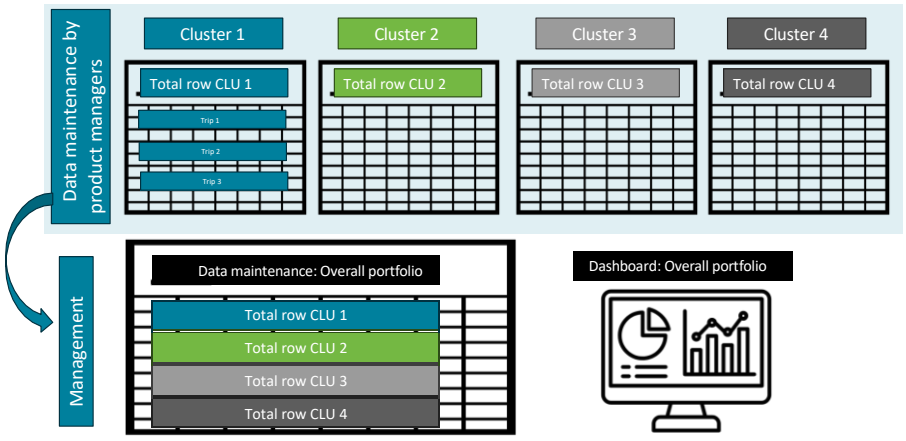
When sending the tracker to your product managers, the briefing for the PMs should include the following information:

- Guidance on grouping products/trips into clusters, based on your preliminary considerations
- Guidelines for saving individual tracker versions – a correctly named version for each cluster (as well as a reference to the manual and Chapter 1.3 on installation and setup)
- Instructions on how travel data should be recorded in the tracker
- Clarification on how the final tracker files are to be handled once data entry is complete (Should the files be sent to you? In the event of subsequent automation of the import process: Where should they be stored to enable automatic import of the total rows?)

4.2.4 Entry of cluster data for overall portfolio analysis ('Data Maintenance' tab)

Once all product managers have completed their data entry and created a separate tracker file for each cluster and sent it to you, you can create an overall version of the portfolio. To do this, open the dashboard for the overall portfolio analysis in the input screen of *your* tracker version and use the 'Data Maintenance' tab to insert the total rows for each cluster by copying and pasting them from the individual tracker files. In your tracker version, therefore, each row in the data maintenance section represents a cluster rather than an individual trip. This differs from the detailed data maintenance carried out by the product managers, who work at the level of individual trips, whilst you operate at an aggregated level. The following figure illustrates this difference between the tracker versions used by the PMs and those used by senior management.

Figure: Data maintenance for PMs vs. data maintenance for senior management



Once you have successfully entered all the total rows, you can proceed to analyse and interpret the data in the KPI columns and dashboards (see sections 4.4 and 6 respectively).

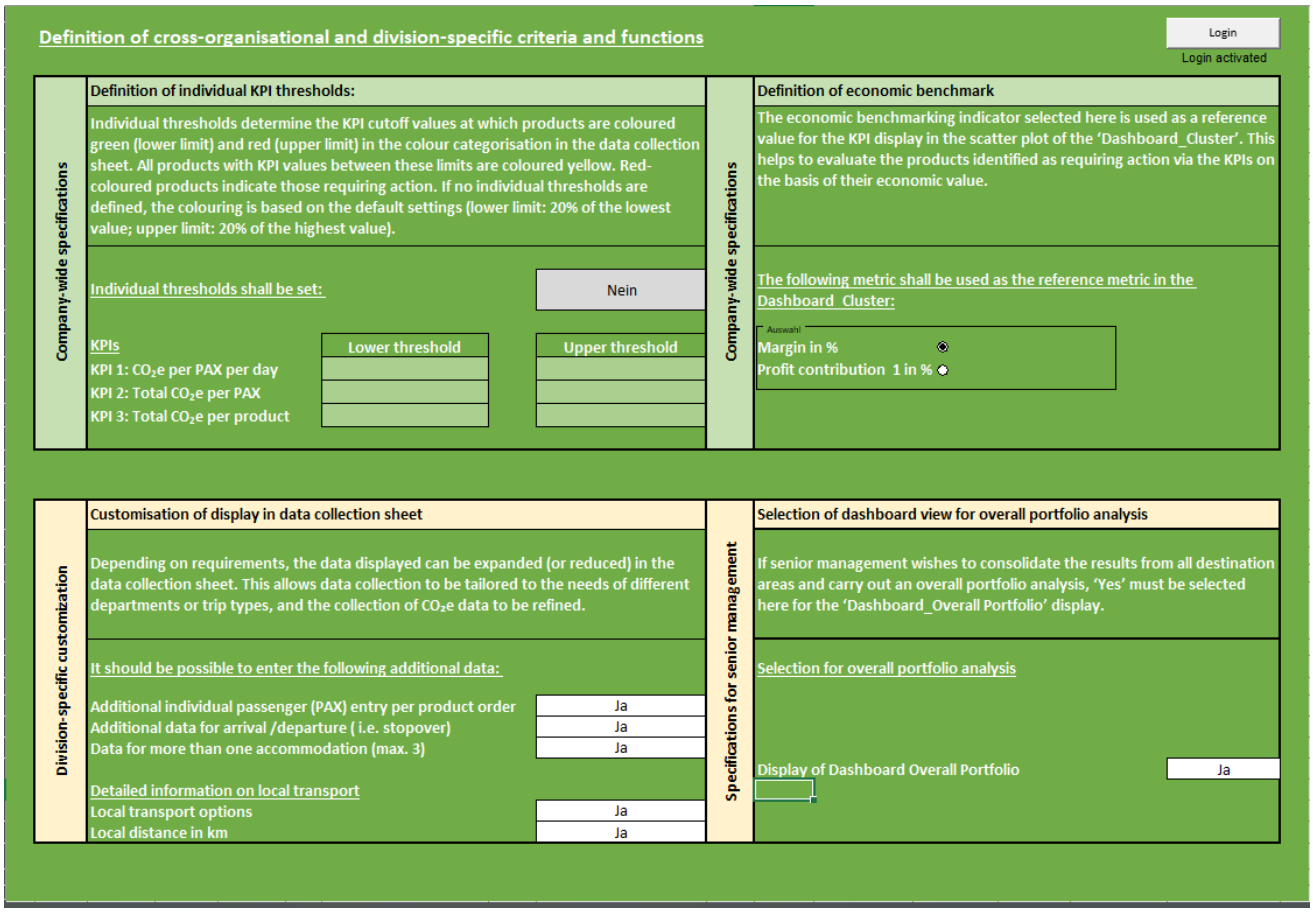
4.3 Customising the tracker (the 'Input form' tab)

The Travel Emissions Tracker offers you various customisation options. Managers can specify which financial metrics (margin or profit contribution in %) are used to evaluate products. Furthermore, the thresholds for the colour categorisation of the KPIs can be set individually. You can configure these settings in the **input form**.



Once the customisations have been made, you can easily share the tracker with your team or the product managers (including the briefing, see 4.2.3). They then simply enter the travel data and immediately receive a clear overview of the climate impact of their products (see instructions for PMs in Chapter 5).

Below you will find a detailed overview of the input form and its functions and configuration options.

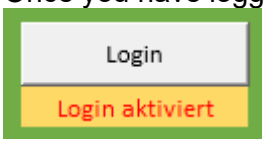


1. Logging in to the input form

Click on the login button and log in using the password: tet2024 to unlock the functions of the input form.



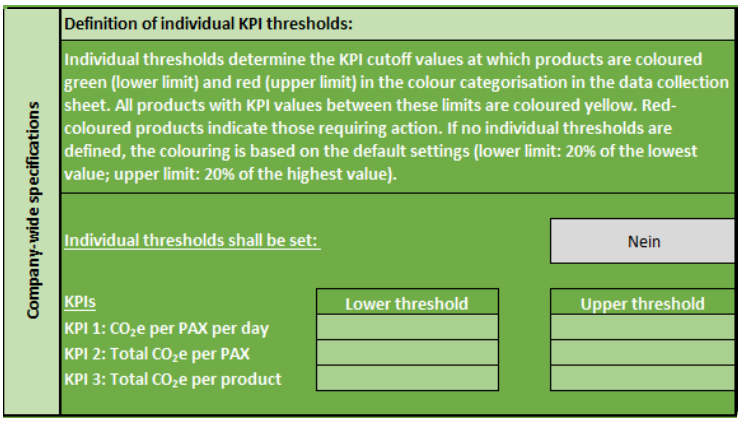
Once you have logged in successfully, the login button will be marked as ‘activated’.



You can now make changes to the tracker in the input form.

2. Set thresholds for KPIs

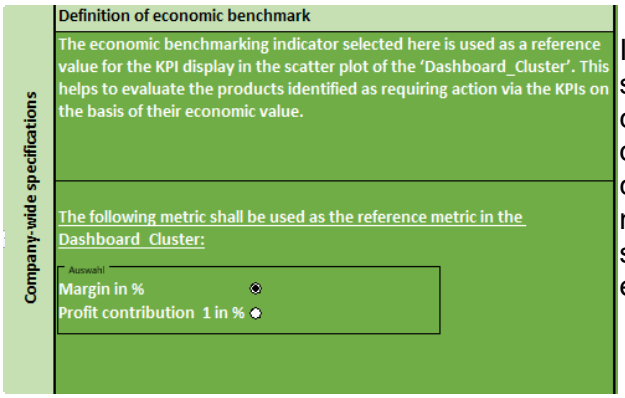
The first option for customising the tracker is through the threshold values for KPI colour-coding. The three KPIs are calculated automatically for every product entered in the data collection section. The KPI values are colour-coded using a traffic-light system. The tracker comes with an automatic default setting for this colour-coding, which can be changed. In the screenshot below, “No” is selected for setting custom thresholds. With this selection, the KPI columns are coloured green (= lower threshold) up to 20% from the lowest data value and red (= upper threshold) from the highest data value minus 20%. This colour coding is therefore dynamic and depends on the values entered.



If you wish to change this default setting, please select ‘Yes’ for ‘Individual thresholds should be set’. This will remove the colour from the cells corresponding to the lower and upper limits of the three KPIs, allowing you to enter any values you wish (see below). The colouring will now change both in the data collection and in the dashboard of the KPIs and the number of products or clusters requiring action.

3. Select economic benchmark

In the ‘Defining the economic reference value’ section, you can choose whether your PMs should use the profit contribution as a percentage or the margin as a percentage as the economic reference value when entering product data in the data collection sheet. This is later used in the visualisation to correlate the emissions of the products with their economic viability.

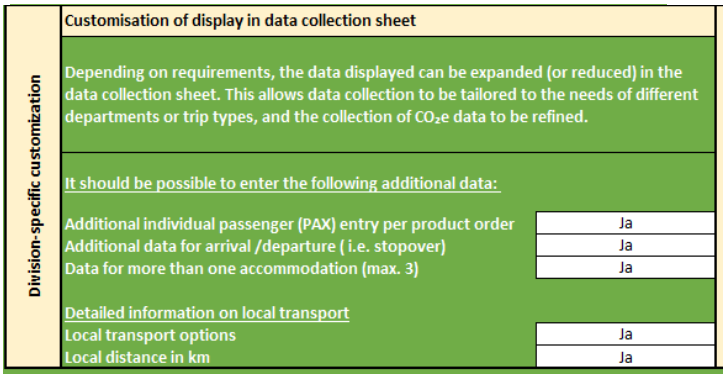


In the example shown, ‘Margin in % is selected. As a result, the ‘Profit contribution 1 in %’’ column is hidden in data collection and the ‘Margin in %’ column is displayed. The PMs can then no longer change this and use a standardised economic metric for data entry.

4. Customising the display in data maintenance (currently not available)

Here you specify which additional data relating to individual trips should appear as extra columns under the optional details in data maintenance. This may be necessary, for example, when entering round trips or more complex products. Furthermore, entering this data increases the accuracy of the recorded emissions data.

In the example shown opposite (which is also the default setting), all the data shown is selected (by choosing ‘Yes’) and appears as labelled columns in data maintenance.



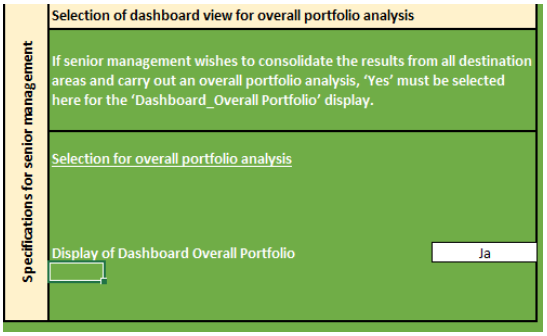
To find out more about the individual data points, e.g. when they are relevant, please refer to section 5.3.

5. Selecting the dashboard view

In the Tracker version that you send to your PMs, you can choose to hide the ‘Dashboard: Overall Portfolio’ tab hidden. This corresponds to the Tracker’s default setting and looks as shown in the following two figures.

If you wish to carry out an overall portfolio analysis or provide product management with further analytical figures. the Overall Portfolio’ must be displayed.

You can find the exact procedure for carrying out an overall portfolio analysis in sections 4.2 and 4.4, and in section 6 for the evaluation. To display the 'Overall Portfolio' dashboard, select 'Yes' from the drop-down menu as shown in the bottom right-hand corner.



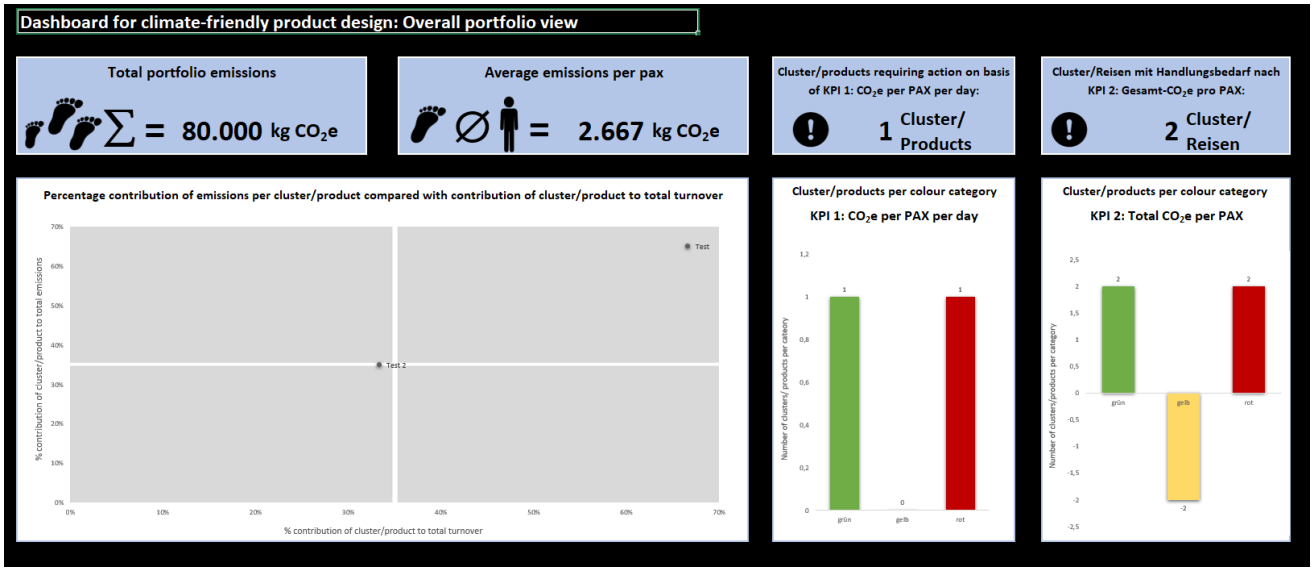
Example: The 'Overall Portfolio' dashboard is displayed.

6. Saving and sharing the Travel Emissions Tracker

Once you have finished customising the tracker, you can proceed to Step 3 (Chapter 4.2.3) – Forwarding to the PM. If required, you can also save your own version of the tracker directly with the 'Overall Portfolio' dashboard, so that you can carry out the overall portfolio analysis. For instructions, please refer to Chapter 4.2 and following.

4.4 Analysis and interpretation ('Overall Portfolio Dashboard' tab)

Once all total rows have been entered or imported from the PMs, visualisation and analysis take place in the 'Overall Portfolio Dashboard' tab. Here, the KPI values for the clusters are summarised and visually presented, and they are classified within the decision matrix. In the following diagram, the various sections of the dashboard are shown and briefly explained below. You can also take a look at the 'Cluster Dashboard', which contains additional figures for evaluation. For further interpretation, please refer to Chapter 6 on prioritisation and action planning, and Chapter 7 on annual monitoring.



Key figures for annual monitoring (see Chapter 7)

1. Total emissions of the portfolio: Here, the total emissions of the products or clusters entered are added together. The figure shows the total emissions of the product portfolio in kg CO_2e.

2. Average emissions per passenger across the entire portfolio: In this field, the emissions from the products entered are totalled across all clusters and divided by the total number of passengers across all clusters to give the average emissions per passenger across all clusters.

Key figures and visualisations for prioritisation and action planning (see Chapter 6)

3. Number of clusters requiring action according to KPI 1

4. Number of clusters requiring action according to KPI 2

5. Scatter plot for classifying clusters based on their percentage share of emissions and turnover relative to total emissions and total turnover respectively.

6. Bar charts: The bar charts update automatically based on the KPI thresholds selected in the customisation input screen. They show how many clusters fall within the green, yellow or red zones. This categorises the clusters into low-emission (green) and high-emission (red) clusters, as well as those with medium emissions (yellow).

5. Procedure for product management

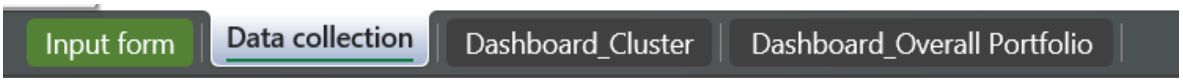
5.1 Step-by-step overview

You'll find all the procedures and information you need to use the tracker in product management here. Depending on the size of the company, you will receive the tracker file with all the necessary default settings from senior management. If you are responsible for several clusters or areas – hereinafter always referred to as 'clusters' – in product management, please save a separate version of the tracker for each cluster and carry out the following steps for each cluster individually. This is necessary so that a cross-departmental overall portfolio analysis can be carried out later.

Workflow for using the tracker in product management:

Objectives and planning by senior management		Chapter 4
Issue analysis: Division-specific portfolio analysis		
1.	Recording of travel data ('Data Collection' tab)	Chapter 5.2
2.	Entering emissions data (the 'Data Collection' tab) using KlimaLink	Chapter 5.2
3.	Analysis and interpretation (the 'Dashboard Cluster' tab, supplemented by 'Dashboard – Overall Portfolio') • Automatic categorisation and evaluation of KPIs by the Travel Emissions Tracker • Overview of KPIs for each product entered, in relation to economic benchmark and colour categories	Chapter 5.4
Action planning		
4.	Prioritisation of products • Identification of products requiring action • Focus on clusters by senior management	Chapter 6
5.	Planning department-specific measures using the catalogue of measures	
6.	Forwarding the final tracker file(s) to senior management	
Implementation of measures (independently of the tracker)		
Monitoring		
8.	Annual monitoring of the business unit's portfolio through regular use of the tracker	Chapter 7

5.2 Entering travel and emissions data (the ‘Data Collection’ tab)

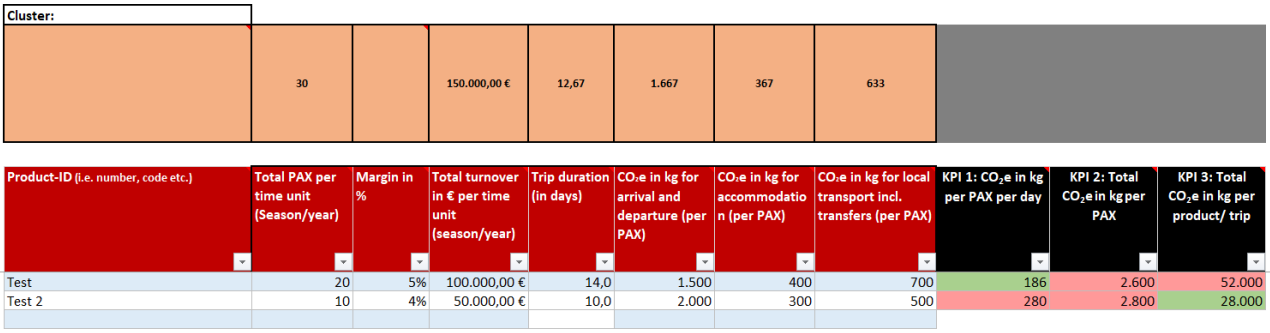


The first step is to enter your product details into the data table. Data entry takes place in **the ‘Data Collection’** tab. Here, you enter information such as the destination, the mode of transport and the accommodation. Some fields are optional (blue columns) to allow for a detailed description of your trips (function currently not available), whilst other fields are mandatory (red columns) so that the tool can calculate emissions correctly.

In the second step, you use **KlimaLink** to add the CO_2e emissions for the various components of your products – for example, for travel to and from your destination or your accommodation. Once you have entered the required data, the tracker automatically calculates the total emissions and the so-called Key Performance Indicators (KPIs). These metrics help you to assess the environmental footprint of each product.

It is also possible to automate data transfer from the company’s own product management systems and by setting up an API interface for KlimaLink.

Below you will find a detailed overview of the functions in the ‘Data Collection’ tab and the requirements for data entry. Incidentally, the buttons in the top-left corner of the ‘Data Maintenance’ tab allow you to group, show or hide the blue and red columns to make the view as clear as possible (function currently not available)



Cluster:										
	30		150.000,00 €	12,67	1.667	367	633			

Product-ID (i.e. number, code etc.)	Total PAX per time unit (Season/year)	Margin in %	Total turnover in € per time unit (season/year)	Trip duration (in days)	CO_2e in kg for arrival and departure (per PAX)	CO_2e in kg for accommodation (per PAX)	CO_2e in kg for local transport incl. transfers (per PAX)	KPI 1: CO_2e in kg per PAX per day	KPI 2: Total CO_2e in kg per PAX	KPI 3: Total CO_2e in kg per product/ trip
Test	20	5%	100.000,00 €	14,0	1.500	400	700	186	2.600	52.000
Test 2	10	4%	50.000,00 €	10,0	2.000	300	500	280	2.800	28.000

1. Entering the destination/cluster name

To begin data entry, please first enter the cluster in the designated cell for which you will be completing the tracker.

2. Total row for the overall portfolio analysis

In the row with the orange cells, the mandatory data is automatically totalled for submission to senior management for the purpose of conducting an overall portfolio analysis. When totalling the duration of travel, the data is weighted by passenger days, and when totalling the issue data, it is weighted by passenger numbers.

Another important exception for you is the economic figure expressed as a percentage. Here, you must manually enter the cluster's average margin or average contribution margin as a percentage.

3. Column headers for identification and analysis-relevant characteristics

Data entry is divided into red (mandatory) and blue (optional) columns (function "blue" currently not available).

The red mandatory columns contain the characteristics relevant to the analysis and must be completed (these include total number of passengers, total turnover, trip duration, CO_2 figures and economic size). Only when these columns have been fully completed can the KPIs be calculated and the visualisations displayed in the dashboard.

(Function currently not available) The blue columns contain trip identification details, which serve to make the precise description and characteristics of the trip immediately visible and traceable. Furthermore, the optional data is required if a two-stage data entry process is selected. For example, a PM can enter all trip details, which are then supplemented by a central unit – such as the sustainability officer, using KlimaLink to add CO_2e data.

The columns can be grouped and expanded or collapsed to keep the file organised or to place the KPI values and colour coding directly next to the trip IDs.

The exact requirements for the individual attributes and their entry can be found in Section 5.3 below, as well as via a tooltip directly in the columns within the tracker.

4. Data rows

Each row listed here corresponds to a travel product (or a representative trip) or a travel order with the individual attributes entered. The values can be entered individually or copied in (if the data can be extracted automatically from your system).

5. Calculated KPIs

The black columns contain the values of the calculated KPIs. These are calculated automatically as soon as all mandatory columns have been completed. In addition, the cells are colour-coded according to the threshold settings in the input form.

The tracker therefore uses a colour-coding system to show you at this stage which products are classified as low-emission (green), medium (yellow) or high (red). This visualisation makes it easy for you to quickly identify which products are particularly harmful to the climate.

For a clearer overview, you can use the filter function (the small arrow at the bottom right of the black cells) to filter by colour; this allows you, for example, to display only the trips coloured red for a selected KPI.

6. In-depth analyses using the dashboard --> see Chapter 5.4 or Chapter 6

Once you have finished entering all the data and taken an initial look at the KPI values and their colour coding you can go to the ‘Dashboard Cluster’ tab and, additionally, the ‘Dashboard Overall Portfolio’ tab for a more in-depth analysis of the data.

Detailed requirements for the input columns (the 'Data Collection' tab)

The individual columns in Data Collection and the requirements for data entry are described in detail below:

Product/Trip ID (number, code, etc.)	Please enter a unique product/trip identifier from your system here. This should enable you to retrieve the trip.

Analysis-relevant characteristics:	Analysis-relevant attributes, without which no KPI calculation or evaluation can take place (mandatory fields)
Total passengers per time unit (season/year)	Please enter here, for the product/ trip entered (or substitute trip), the total number of passengers who travelled on this trip last year/season (depending on the selected time unit). When entering representative trips, this figure must be extrapolated.
Margin in % or profit contribution in % (depending on the entry in the input form)	Please enter the margin or profit contribution as a percentage for the relevant trip here.
Total turnover in € per time unit (season/year)	Please enter here the total turnover in €, generated by all the trips entered during the specified time period (season/year).
Duration of trip (in days)	Please enter the duration of the trip in days here. When entering substitute trips, the duration entered here must also be a substitute value. You can also enter numbers with one decimal place here.
CO_2e in kg for outward and return journeys (per PAX)	Use KlimaLink to calculate these figures. Please ensure you specify 'PER PAX'.
CO_2e in kg for accommodation (per PAX)	Use KlimaLink to calculate these figures. Please ensure you specify 'PER PAX".
CO_2e in kg for local transport, including transfers (per PAX)	Use KlimaLink to calculate these figures. Please note the 'PER PAX' specification.

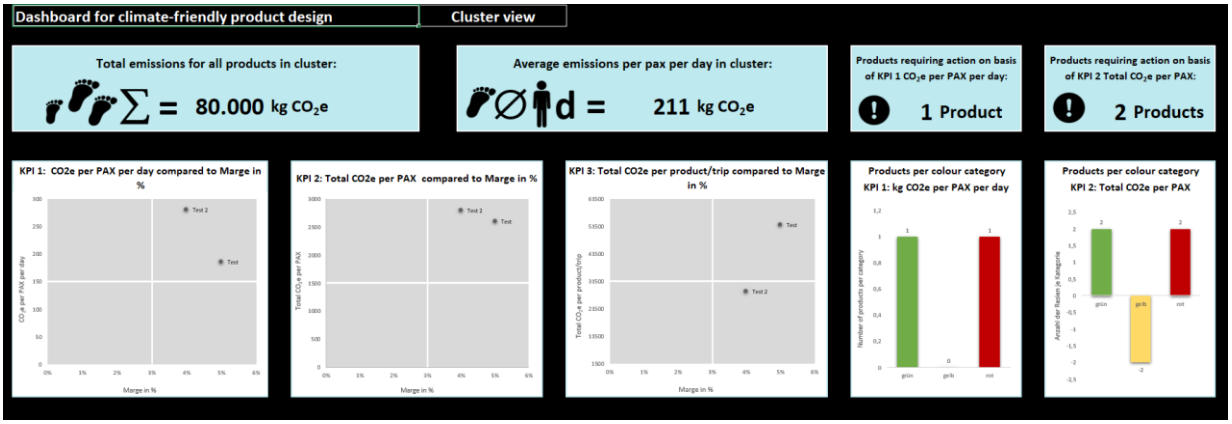
Key Performance Indicators	The KPIs are calculated automatically; no entries are required in the fields here.
KPI 1: CO_2e in kg per PAX per day	The calculation is carried out by adding up the CO_2e columns; the total is then divided by the specified duration of the trip.
KPI 2: CO_2e in kg per PAX	The calculation is performed by summing the CO_2e columns.
KPI 3: Total CO_2e in kg per product/ trip	The calculation is carried out by adding up the CO_2e columns; the total is then multiplied by the number of passengers and the specified duration of the trip.

You can find all the information on how to use KlimaLink here.

5.3 Visualisation and analysis (’Dashboard Cluster’ tab)



The ‘Dashboard Cluster’ tab is where the results are analysed and visually presented based on the travel products entered by the product managers. Here, the KPI values for the trips are summarised and visually presented, and these are then mapped onto the decision matrix. In the following diagram, the various sections of the dashboard are shown and then briefly explained below. In addition, you can also take a look at the ‘Overall Portfolio’ dashboard, which includes further figures in the analysis (see Section 4.4). For further interpretation, please refer to Section 6 on prioritisation and action planning, and Section 7 on annual monitoring.



Key figures for annual monitoring (see Chapter 7)

1. Total emissions across all products in the destination/cluster: Here, the emissions from the products/trips entered within the destination/cluster are added together. The total emissions are shown in kg CO_2e.

2. Average emissions per passenger per day in the cluster: In this field, the emissions from the trips entered for each cluster are added together and divided by the total number of passenger-days (per trip: duration of the trip in days × total number of passengers per time unit) to give the average emissions per guest per day.

Key figures and visualisations for prioritisation and action planning (see Chapter 6)

3. Number of products requiring action (shown in red) according to KPI 1

4. Number of products requiring action (shown in red) according to KPI 2

5. Scatter plots for the visual representation of trips based on the emissions of the respective KPIs in relation to the economic benchmark in a decision matrix.

6. Bar charts: The bar charts update automatically based on the KPI thresholds selected in the customisation input screen. They show how many products fall into the green, yellow or red categories. This classifies the entered products into low-emission (green) and high-emission (red) products, as well as those with medium emissions (yellow).

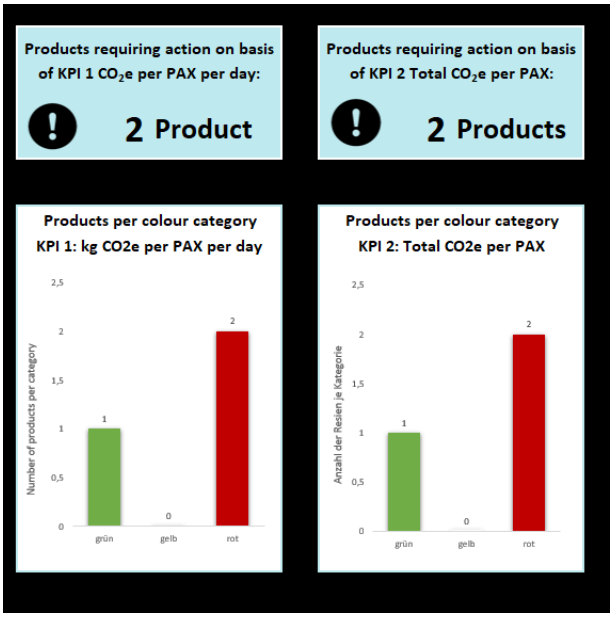
6. Prioritisation and action planning ('Dashboard' tab)

6.1 Procedure

Now that you have familiarised yourself with the visualisation in the dashboard, the next step involves prioritising products or clusters and, consequently, deriving strategies for the respective areas based on the results in the dashboard.

You can already gain an initial impression of your portfolio, including an initial prioritisation, in the data maintenance section by looking at the colour coding of the three KPI columns and, in particular, by focusing on the red entries (see Chapter 5.2, section on KPI calculation). It is precisely this colour coding that is presented at a glance in the dashboard's bar chart for KPI 1 and KPI 2. The products or clusters shown in red here are those requiring action, as they exceed the specified maximum emissions limit. At the same time, the small information boxes above the bar charts show you directly how many products or clusters consequently require action. The number displayed is the number of red-coloured products or clusters per KPI.

Information boxes and bar charts for KPIs 1 and 2 from the 'Cluster' dashboard section:



The following applies to both analyses (cluster-based and overall portfolio-based): if your portfolio contains more green than red products or clusters, it can be considered relatively low-emission. If the ratio is the other way round, you have a relatively high-emission portfolio and will be shown a corresponding number of products requiring action. Depending on the composition of your portfolio, the number of products or clusters requiring action may be very high. For further planning and prioritisation of products or clusters, it is therefore necessary to delve deeper into the interpretation of the various KPIs and the dot charts displayed. This is covered in the following two sections.

6.2 Interpretation of the KPIs

Chapter 2 of the manual introduces the three Key Performance Indicators (KPIs) used in the tracker. To properly understand the analyses and the interpretation of the bar charts in the dashboard, it is important to examine the KPIs in more detail. It becomes clear that it is not enough to look at just one KPI – all three must be analysed in combination.

KPI 1: CO_2e in kg per PAX per day

KPI 1 is the key indicator for directly comparing trips or clusters, as it specifies emissions per guest per day of the holiday. This makes trips comparable regardless of their duration and the number of guests. This not only allows individual trips to be compared, but also enables monitoring over time. In addition to total emissions, you should definitely examine and evaluate your trips or clusters using this indicator. Measures to significantly improve this KPI include, in particular, extending the duration of the trips on offer, but of course also local transport and activities.

KPI 2: Total CO_2e in kg per PAX

KPI 2 measures the total emissions caused by a guest during a trip. This KPI is also useful for comparing trips with one another, as it allows the emissions per guest to be compared and improved accordingly. Here, you can implement measures at various points in the travel itinerary; measures relating to transport and accommodation are particularly effective in this regard.

KPI 3: Total CO_2e in kg per trip

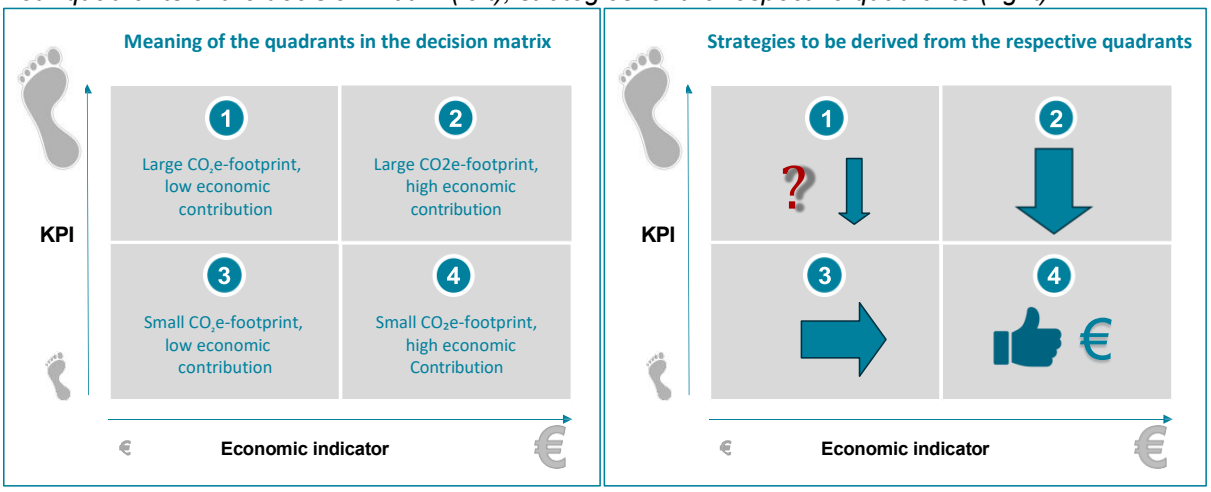
KPI 3 summarises the total emissions caused by all guests on all days of travel for this product during the period under review. These are therefore the actual emissions from the trips organised by your company that have an impact on the climate. This KPI depends significantly on the number of guests taking part in the trip. The more guests who book a product, the higher the emissions – but also the greater the potential impact of measures to reduce emissions. Therefore, for products with a high KPI 3, sales restrictions, less intensive marketing or a lower frequency of operation can be effective strategies for reducing total emissions.

Note: Trips should NEVER be assessed using KPI 3 alone, but should always be considered in conjunction with their performance against KPIs 1 and 2. Only by combining these three KPIs can a comprehensive picture be obtained, enabling both direct comparisons and the identification of specific measures for reducing emissions.

6.3 Interpreting the scatter plots as a decision matrix

The charts in the tracker's dashboard help you to set priorities and select specific products or clusters for which measures need to be planned. Frequently booked products have a greater impact on total emissions, and even small improvements in sustainability can have significant cumulative effects. Tour operators should prioritise measures where they have the greatest impact in order to effectively reduce environmental impact. The scatter plots help you make this decision. They show the emission values of products or clusters in relation to economic metrics for the three KPIs, thereby forming a decision matrix with four quadrants. The following figure shows the matrix on the left and the strategies associated with each quadrant on the right.

Four quadrants of the decision matrix (left), strategies for the respective quadrants (right):



Quadrant 1 (top left) comprises products or clusters with a high CO_2e footprint that, at the same time, make only a low economic contribution to the company. For these products or clusters, a divestment strategy is recommended in order to reduce the sale of particularly emission-intensive and unprofitable offerings. If this is not possible or desirable, measures should be taken to reduce CO_2e emissions.

Quadrant 2 (top right) shows products or clusters that, whilst generating high CO_2e emissions, also make a significant contribution to profitability. Here, targeted measures should be implemented to significantly reduce emissions whilst maintaining the economic benefits for the company.

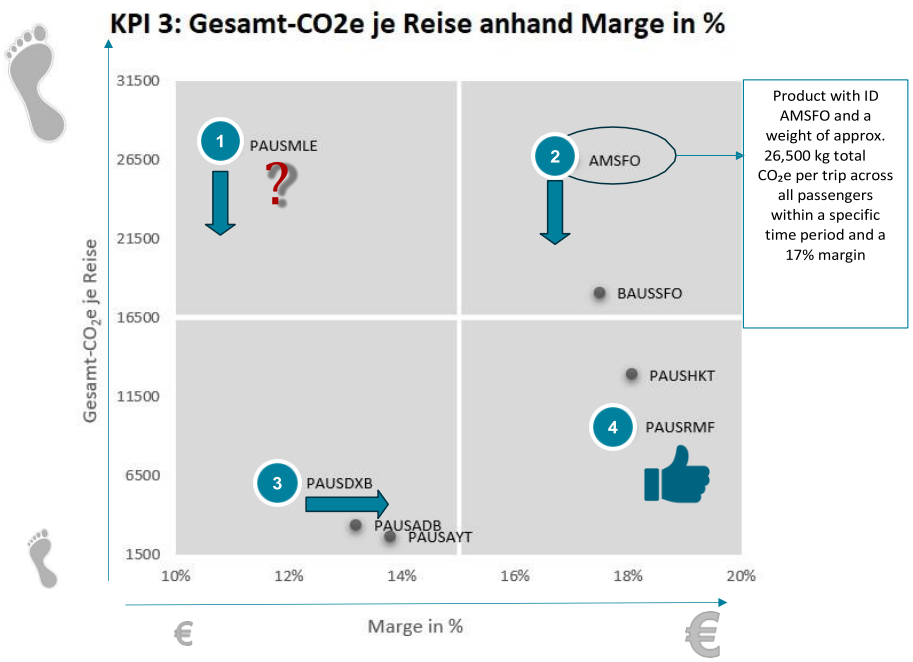
Quadrant 3 (bottom left) comprises products that have both a low CO_2e footprint and generate only modest profits. A growth strategy could help to increase the market share of these products.

Quadrant 4 (bottom right) represents products that have a comparatively low CO_2e footprint whilst making a major financial contribution to the company's success. These trips should be retained; where appropriate, expansion and increased marketing can be planned.

Presentation and interpretation of trips and clusters in the scatter plots

Each product or cluster entered – each of which represents a row in the 'Data Collection' tab – is visualised as a point in the scatter plots. The product ID is shown next to each point in the graph. The axes of the scatter plots automatically adjust to the range of values of the data entered in Data Maintenance.

Example of how to read the scatter plot for KPI 3 in the 'Cluster' dashboard:

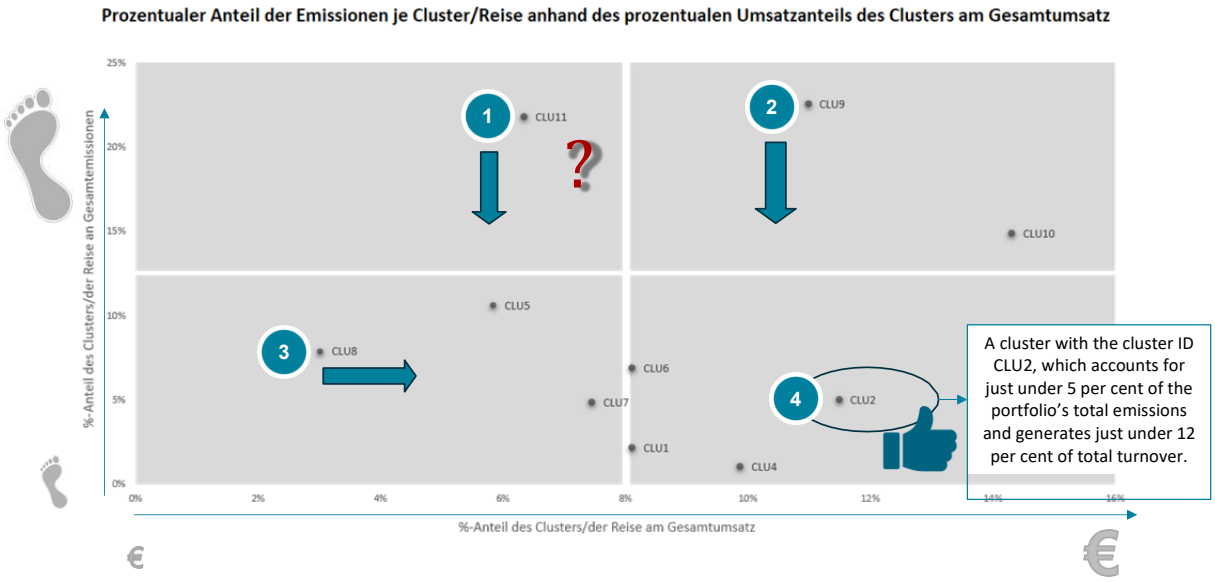


The figure above shows eight products in the decision matrix for KPI 3, i.e. for the total emissions of the products (per time unit, including all passengers). For each of the four numbered products, one example product with its associated strategy is presented in each quadrant.

1. The product "PAUSMLE" in the top-right quadrant is a candidate for a divestment strategy, as it has comparatively high emissions whilst making a low economic contribution.
2. The product "AMSFO" also has comparatively high emissions, but at the same time makes a positive contribution to the company's profitability. It is precisely here that targeted measures should be implemented to reduce the emissions of this journey.
3. By comparison, the product "PAUSDBX" generates low emissions whilst making a rather modest economic contribution. Under certain circumstances, this product could be optimised further in terms of sales and economic performance. However, a detailed assessment is required here. Please also be sure to note the guidance on interpreting products based on KPI 3!
4. The "PAUSRMF" product generates low emissions whilst making a high economic contribution. This product therefore lies in the "sweet spot" of the decision matrix. However, this also applies only if the product performs well in KPI 1 and KPI 2 as well; see the note on interpreting products using KPI 3!

An example of the scatter plot in the overall portfolio analysis is also shown below. Here, ten clusters in the overall portfolio are presented based on their percentage share of total emissions and total turnover. The strategic conclusions can be drawn in the same way as those from the cluster analysis.

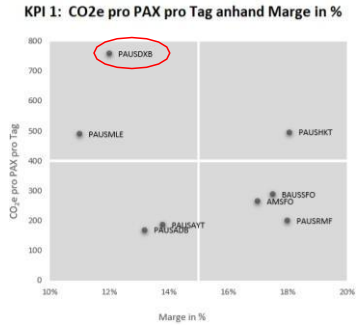
Example of how to interpret the scatter plot in the overall portfolio analysis:

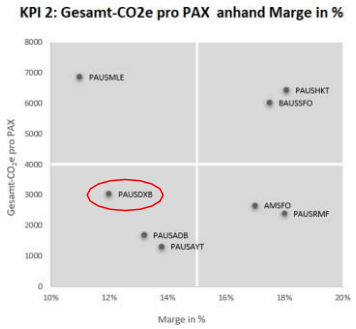


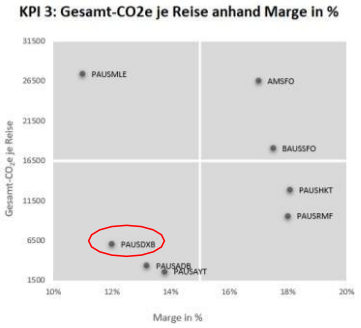
Note regarding the analysis of trips based on KPI 3:

When analysing KPI 3 in particular, it is necessary to cross-check the performance of this trip against KPI 1 and KPI 2. If the trip is marked green for KPI 1, the focus should be placed more strongly on sales and optimising its cost-effectiveness. If, on the other hand, KPI 1 and/or KPI 2 are coloured yellow or red, a detailed review must be carried out in the same way as for Quadrant 1.

Reise-ID (Nummer, Code etc.)	Gesamt-PAX je Zeiteinheit (Saison/Jahr)	Marge in %	Gesamtumsatz in € je Zeiteinheit (Saison/Jahr)	Reisedauer (in Tagen)	CO_2e in kg für An- und Abreise (pro PAX)	CO_2e in kg für Unterkunft (pro PAX)	CO_2e in kg für Mobilität vor Ort inkl. Transfer (pro PAX)	KPI 1: CO_2e in kg pro PAX pro Tag	KPI 2: Gesamt-CO_2e in kg pro PAX	KPI 3: Gesamt-CO_2e in kg je Reise
PAUSAYT	2	14%	5.000,00 €	7,0	1.110	113	80	186	1.303	2.606
PAUSDXB	2	12%	7.000,00 €	4,0	2.870	113	50	758	3.033	6.066
PAUSHKT	2	18%	3.500,00 €	13,0	5.323	348	763	495	6.434	12.868
PAUSADB	2	13%	5.000,00 €	10,0	1.060	252	365	168	1.677	3.353
PAUSRMF	4	18%	3.333,00 €	12,0	1.903	354	135	199	2.392	9.568
PAUSMLE	4	11%	7.777,00 €	14,0	6.097	574	185	490	6.856	27.424
BAUSSFO	3	18%	8.888,00 €	21,0	5.766	88	165	287	6.019	18.058
AMSFO	10	17%	9.000,00 €	10,0	2.000	500	150	265	2.650	26.500







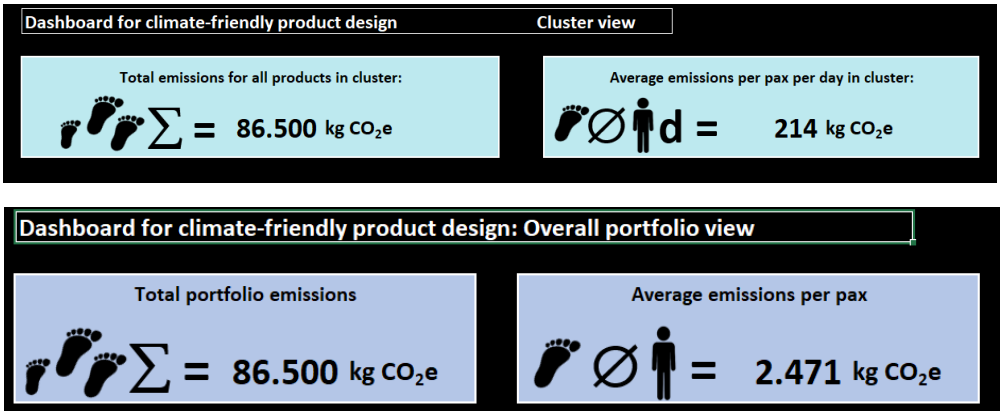
The following figure illustrates this cross-check using the ‘PAUSDBX’ trip described in point 3: Looking solely at this trip’s position in the decision matrix for KPI 3 suggests low emissions and might suggest that a strategy to increase sales figures is warranted. However, a supplementary review of KPI 1 and KPI 2, as well as the corresponding data in the table, reveals a different picture: this trip shows high emissions per passenger per day for KPI 1. An increase in sales figures would therefore significantly raise total emissions.

This example clearly demonstrates how important it is to analyse all KPIs in their entirety before making strategic decisions.

7. Checking as part of annual monitoring

The annual monitoring of KPIs is an essential component of a successful sustainability strategy. It is only by regularly monitoring and analysing the data collected that trends can be tracked. Once you have collected and analysed travel and emissions data, prioritised products or clusters, and planned and implemented measures, from the second year onwards you can use the Tracker's annual monitoring function to assess the effectiveness of the measures taken and thus monitor the emissions trends of individual clusters or the overall portfolio. To this end, it is advisable to produce an annual emissions report that transparently presents the results of the monitoring and highlights progress. Furthermore, based on the analysis, you can set new targets for reducing emissions, assess the success of the measures taken and update your sustainability strategy.

Various key performance indicators are available in two dashboards for the annual monitoring. On the one hand, these include the total emissions in kg CO_2e for all recorded trips (in the 'Cluster' dashboard) or clusters (in the 'Overall Portfolio' dashboard); on the other hand, they include the average emissions per guest (Pax) per day within the cluster or per Pax across the entire portfolio. If the planned measures are successfully implemented over the course of the year, the measured emissions are expected to fall. As total emissions also depend on the number of trips sold, looking at the average emissions per passenger or per passenger per day provides a more meaningful basis for identifying improvements or, indeed, deteriorations.



In addition, in the data maintenance section, you can compare the KPI values of individual trips or clusters by placing two versions of the tracker (previous year and current year) side by side. For example, if you wish to analyse the impact of a measure on a specific trip, you can examine the KPI values for that trip from the previous year's tracker and compare them with the current values. Using KPIs 1 and 2, you can then clearly see whether emissions have fallen in the current year and whether your measures have been successful.

8. Offsetting CO_2e

Offsetting CO_2e emissions is a commonly used measure to counterbalance unavoidable CO_2e emissions. In principle, it is to be welcomed that tour operators are taking responsibility for their emissions and endeavouring to reduce their CO_2e footprint; however, there are also critical arguments against offsetting, and the communication of offsetting measures requires critical scrutiny from a legal perspective, particularly with regard to greenwashing (see EU Empowering Consumers Directive).

There are various approaches and responsibilities regarding offsetting amongst travel providers. Some tour operators consistently and transparently promote the offsetting of CO_2e emissions to their customers; other providers offset the emissions for the travel products they offer themselves, without explicitly communicating this to customers; and still others leave the decision to customers as an option during the booking process.

Theoretical calculation example

For those providers that offset the emissions from the trips they organise, the CO_2e savings achieved through the implementation of measures offer an economic perspective that compares the reduction in emissions with the compensation costs saved. The table below shows, by way of example, the compensation fees charged by atmosfair (as at 3 September 2024).

Table 1 – Offsetting costs with atmosfair

Provider: atmosfair	**Fee in €**
Offset fee per tonne of CO_2e	€31.34
Total offset fee for 10,000 tonnes of CO_2e	€31,340.00

The table shows the offset costs with the provider atmosfair. For 10,000 tonnes of CO_2e emissions, the cost here is €31,340.00. If a tour operator focuses on lower-emission trips, markets these more heavily and adapts higher-emission trips through targeted measures or removes them from its portfolio, total emissions will be reduced, thereby also saving on offset costs.

Let us now assume that a tour operator were to reduce its emissions by 20 per cent by implementing measures. In this way, based on the original figure of
10,000 tonnes of CO_2e, 2,000 tonnes of CO_2e – and consequently €6,268.00 in offsetting costs – could be saved.
In this way, the CO_2e emissions saved through the implementation of measures can be converted into a monetary figure and incorporated into assessments of the financial impacts of measures aimed at climate-friendly product development.