



**EARTH  
GUEST**  
RESEARCH

June 2011

## **SUSTAINABLE HOSPITALITY:** *ready to check in?*

*A world premiere: the first  
international tracking study on  
hotel guest expectations regarding  
sustainable development*



Accor, the world's leading hotel operator and market leader in Europe, is present in 90 countries with 4,200 hotels and more than 500,000 rooms. Its broad portfolio of hotel brands – Sofitel, Pullman, MGallery, Novotel, Suite Novotel, Mercure, Adagio, ibis, All seasons, Etap Hotel, HotelF1 and Motel 6, and related activities, Thalassa Sea & Spa and Lenôtre – provide an extensive offering, from luxury to budget. With 145,000 employees worldwide, the Group offers its clients and partners nearly 45 years of know-how and expertise.



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# INTRODUCTION

## MESSAGE FROM THE CHAIRMAN AND CHIEF EXECUTIVE OFFICER

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For more than 15 years, sustainable development has been a tangible, front-line concern for Accor. Around the world, the Group is committed to meeting the social and environmental challenges related to its business. The goal is to create a virtuous circle that benefits its “ecosystem” - comprising employees, customers, partners, local communities in which hotels are implanted and, of course, the planet as a whole - while creating value for its operations.

Accor’s environmental preservation measures include, for example, reducing energy and water consumption and constantly reinforcing hotel construction and renovation standards.

The Group also forges relationships that are beneficial to all stakeholders. Accor trains employees and raises awareness among guests to combat sexual tourism involving children, supports the local economy through farming projects or the sale of fair trade products, and help suppliers to improve their own practices.

In addition, the Group innovates and upgrades its processes and models to create lasting value. It is committed to supporting new, more environmentally friendly technologies. For example, nearly 120 Accor hotels are equipped with solar panels and pilot hotels are testing technologies that use renewable energies. Lastly, Accor is experimenting with new, more sustainable operating practices, such as composters that transform organic waste into fertilizer for farmers - an illustration of circular economy. These actions and commitments have enabled the Group to reduce its impact and develop in a manner that consistently reconciles social, societal and environmental responsibility.

Leveraging achievements and results that have been recognized, for example by non-financial ratings agencies, Accor has already begun to move even further ahead, with the launch of a major action priority: reinforcing the link between sustainable development and our guests. This involves on one hand showcasing our initiatives more effectively and on the other demonstrating more fully the ways in which sustainability can improve service quality. This decision is based on the simple observation that optimizing our internal processes is not enough in itself to significantly improve our social and environmental footprint. Reducing our impact requires the active participation of our customers. We can help get them involved by designing innovative, more sustainable products and services that bring real added-value to their hotel experience.

To successfully integrate hotel customers into this process, we need to begin by accurately understanding their expectations with regard to sustainability. That is the purpose of this study, which Accor is proud to share freely and graciously with all hotel industry players.

By creating the Earth Guest Research open knowledge platform, the Group has reaffirmed its vision of sustainable hotels as a collective project as well as its ambition: reinvent hotels... sustainably.

Denis Hennequin  
Chairman and Chief Executive Officer of Accor

# ACCOR AND SUSTAINABLE DEVELOPMENT:

## OVER 15 YEARS OF COMMITMENT

Reflecting its strong commitment to sustainable development, Accor created an Environment Department in 1994. Through its Earth Guest program, the Group is actively involved in creating sustainable hotels that support the interests of people and the environment. Deployed in 90 countries, the program is organized around eight priority action areas.

### SUPPORTING PEOPLE



#### CONTRIBUTING TO LOCAL DEVELOPMENT

Support the economic development of local communities through long-term partnerships and promote fair trade.

- > **21 countries** serve fair trade products in Accor hotels.
- > **4 projects** with NGO Agrisud International, in Brazil, Cambodia and Morocco that provide support for 300 market-gardener cooperatives.



#### PROTECTING CHILDREN

Train employees and inform customers about the fight against child sex tourism.

- > **33 countries** have signed the ECPAT/UNWTO Child Protection Code of Conduct.
- > **50,000 employees** have been trained since 2006 in combating child sex tourism.



#### FIGHTING AGAINST EPIDEMICS

Deploy preventive measures and combat major epidemics, in particular HIV/AIDS and malaria.

- > **32 countries** involved in the fight against HIV/AIDS.
- > **40,000 employees** trained in 2010 to combat HIV/AIDS.



#### PROMOTING BALANCED FOOD

Provide customers with a more balanced food selection and combat obesity.

- > In **35 countries**, Novotel offers a balanced meal option for children.

### PRESERVING THE ENVIRONMENT



#### MANAGING ENERGY CONSUMPTION

Improve energy efficiency and reduce consumption through tight management practices while promoting the use of renewable energies.

- > **5,5%** reduction in energy use between 2006 and 2010.
- > **82%** of Accor hotels equipped with compact fluorescent lamps for areas that stay lit around the clock.
- > **116 hotels** fitted with solar panels.



#### CONSERVING WATER

Reduce water consumption, recycle wastewater and reduce emissions. Raise awareness among employees and customers.

- > **12%** water consumption reduction between 2006 and 2010.
- > **85%** of Accor hotels equipped with flow regulators.



#### PRODUCING LESS WASTE

Recycle more and better, and limit the amounts of waste produced.

- > **57%** of Accor hotels recycle paper, cardboard and glass.
- > **79%** of Accor hotels process batteries and compact fluorescent tubes and light bulbs.



#### PROTECTING BIODIVERSITY

Introduce sourcing and management practices for green areas that respect biodiversity. Raise awareness among customers and employees, in partnership with associations.

- > **1,150 hotels** serve organic food products.
- > **76%** of hotel involved in environmental protection programs.

### CERTIFICATIONS

495 Accor hotels - 12% of the network - have been awarded ISO 14001 or EarthCheck sustainable development certification.



#### PLANT FOR THE PLANET: "5 TOWELS REUSED = 1 TREE PLANTED"

An innovative, efficient equation: since the project's launch in 2009, Accor has financed the planting of **1.7 million trees around the world**. Objective: 3 million trees planted by year-end 2012

Deployed around the world, the Earth Guest program federates the Group's initiatives while adapting them to local challenges. The program is guided by **advanced management tools**, especially for measuring and ensuring environmental performance. The Group's commitment is supported by the **active involvement of its 145,000 employees**, who regularly receive information and training about the challenges of sustainable hospitality so that they can integrate more responsible practices into their day-to-day actions.

Over the past 15 years, Accor has achieved tangible, measurable results that are recognized by experts. Accor is the only hotel group included in the four benchmark international socially responsible investing indexes: SAM's Dow Jones Sustainability Indexes, Vigeo's ASPI Eurozone index, EIRIS' FTSE4Good index and Ethibel's ESI index.

# EARTH GUEST RESEARCH

## SHARING TO PROGRESS... SUSTAINABLY

In 2011, Accor launches Earth Guest Research, a shared knowledge platform on sustainable development in the hospitality industry that is both free and open to all.

### Why Earth Guest Research?

As a company committed to sustainable development with its Earth Guest program, Accor considers that it is its duty to help spread knowledge in order to promote progress of all players in the hotel industry, both companies and customers.

There is another reason that explains the Group's approach: **a responsible hotel cannot exist alone. It's part of a collective achievement.**

First of all, we need to involve our **guests**. Accor has installed energy-efficient light bulbs in 82% of its hotels. This, however, is not enough to offset the energy used when customers leave their room with the television and the lights on.

The Plant for the Planet project is another illustration of the crucial role played by guests. Launched in 2009, the project is based on a simple, effective equation: "5 towels reused = 1 tree planted." However, the equation only works if guests do their part.

Our **employees** are also a key link in the chain. That's why they are regularly trained in new practices and new ways of carrying out their day-to-day responsibilities as well as informed about the purpose of the approach. It is by giving meaning to these new practices that we ensure their implementation.

To achieve its goal of obtaining EarthCheck certification for all of its hotels by 2012, Novotel has introduced a dedicated e-learning module that is currently being deployed for its 25,000 employees. With this training tool, the brand is raising awareness of sustainability challenges by reviewing the planet's current state of affairs, impacted by growing pressure on natural resources, the spread of epidemics like HIV-AIDS and the widening inequality gap between rich and poor. The e-module then takes employees on a virtual tour of 13 areas of a hotel, from the kitchen to the rooms, with a short quiz at each stop to remind them of correct practices, such as the importance of turning off air-conditioners before opening windows.

Accor also needs to win the support of **other industry players**. In five years, the Group has trained 50,000 employees to combat sexual tourism involving children. These demanding training sessions are regularly updated to enable staff to recognize situations in which children are at risk and to respond immediately. The results of these efforts are very significant on the Accor scale, but having a real impact on the problem requires a concerted effort on the part of all hospitality industry players. That's why Accor shares its training resources and best practices with all hotel operators.



### ACCOR HAS LAUNCHED EARTH GUEST RESEARCH,

an open knowledge platform  
on sustainable development  
in the hotel industry.

"Sustainable Hospitality:  
ready to check in?" is  
Earth Guest Research's first  
publication.

Lastly, sustainability concerns are integrated into our **work methods**. We feel strongly that continuous improvement involves dialogue and exchanges. Transparency is a critical efficiency vector and a tool that can help promote discussion and experience sharing. These exchanges broaden and deepen all initiatives intended to improve sustainable development performance, not only for Accor but also for our competitors, suppliers and guests.

# SUSTAINABLE HOSPITALITY: READY TO CHECK IN?

## A WORLD PREMIERE

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The first publication of the Earth Guest Research platform is devoted to guests. In order for actions to be effective, it is necessary to have factual, in-depth knowledge of guests' expectations and their behavior in terms of sustainable development.

Understanding the vision of hotel guests, identifying what they are ready to do, what cause could rally them, which attitudes they are ready to change, will help the entire sector do more in favor of men and the planet.

That's why Accor is publishing **the first international tracking study on hotel guest expectations regarding sustainable development**.

As with all publications released by Earth Guest Research, **the survey's findings are shared free of charge**.

In addition, **the survey's methodology will be made available to all industry players upon request** so that the survey can be extended or conducted in new countries. The only condition is that they freely share their results, as Accor does.

The tracking study is intended to be more broadly deployed and to be regularly updated to note changes in its findings.

## FREELY-SHARED INFORMATION

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The study's findings can be downloaded free of charge on the **accor.com** website in the sustainable development section.

## AN OPEN APPROACH

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Accor makes the tracking study's methodology available to competitors. All industry players are free to conduct a survey in the country of their choice, provided that they agree to freely share their findings.

## CONTACT

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# SUSTAINABLE HOSPITALITY: READY TO CHECK IN?

## METHODOLOGY

*Carried out with the Ifop, this study scrupulously respects the scientific and deontological principles of sample surveys.*

### HOTEL CUSTOMERS SURVEYED IN 6 COUNTRIES

The survey was carried out using **representative samples** of hotel customers in six countries across all types of hotel (chains, independent hotels, etc.).

The representativeness of the sample was ensured using a quota method regarding gender, age and profession. The survey questioned **6,973 interviews - more than 1,200 per country<sup>1</sup> - across all hotel categories, from budget to luxury.**

**The definition used** for the study parameters were as follows:

- **A hostel guest** is a person who has spent at least one night in a hotel over the past 12 months.
- **The hotel category** was determined by the type of hotel in which the customer has spent the most nights.
- **The reason for stay** (business or leisure) was also determined by the reason given most often by the customer for all hotel stays over the past 12 months.

The survey was conducted from August 9-30, 2010 using computer-assisted web interviewing technology (CAWI).

### FOCUS ON 6 COUNTRIES

**The six countries included in the survey were Australia, Brazil<sup>2</sup>, China<sup>2</sup>, France, Germany and the United Kingdom.**

**This selection was carefully made to allow comparisons between countries:**

- with different cultures: Latin (Brazil, France), Anglo-Saxon (United Kingdom, Australia), and Asian (China);
- with varying economic development levels: mature (Germany, Australia, France, United Kingdom) and emerging (Brazil, China);
- already suffering first-hand the effects of climate change, like Australia.

### AN EXPERT PARTNER: IFOP

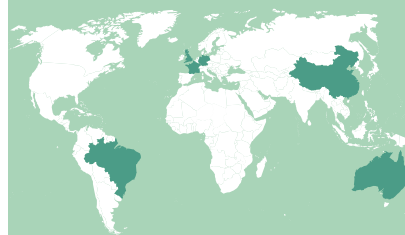
Since 1938, Ifop has been one of the pioneers and leaders in the field of opinion surveys and market studies. Ifop operates all around the world, working with local teams in 4 geographical areas: Europe, North America, South America and Asia.

In 2002, Ifop applied its expertise to the area of sustainability by launching the Sustainable Development Observatory (ODD), an exclusive study that measured the rise of this important societal development. Since 2006, the ODD has been gradually extended to the United States, Germany, China and, in 2010, Latin America.

## A STUDY OF HOTEL CUSTOMERS AROUND THE WORLD

Conducted in six countries, the survey interviewed customers from all types of hotels.

The samples are representative of each country's hotel clientele.

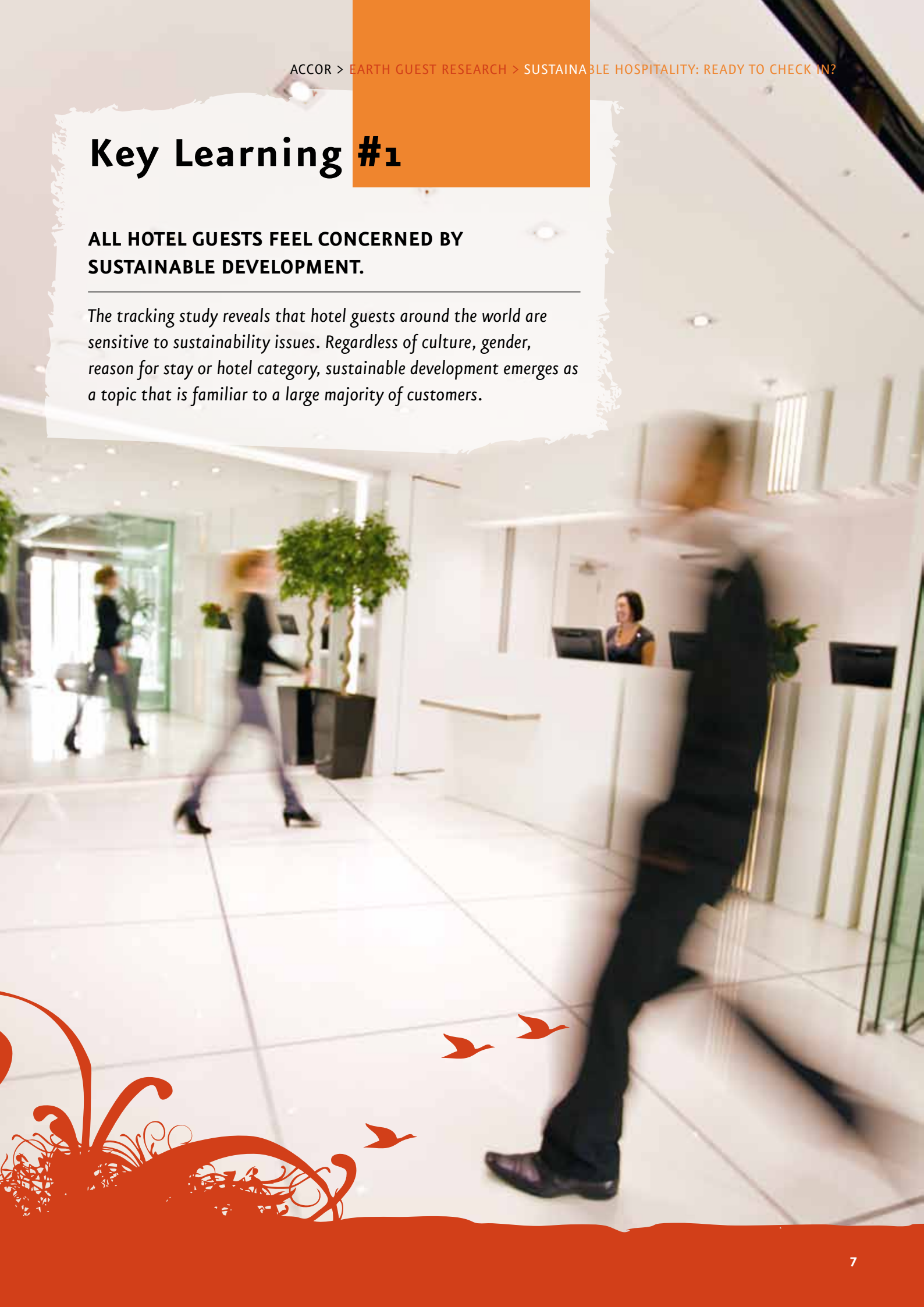




# Key Learning #1

## **ALL HOTEL GUESTS FEEL CONCERNED BY SUSTAINABLE DEVELOPMENT.**

*The tracking study reveals that hotel guests around the world are sensitive to sustainability issues. Regardless of culture, gender, reason for stay or hotel category, sustainable development emerges as a topic that is familiar to a large majority of customers.*



**GLOBALLY, NEARLY 8 OUT OF 10 HOTEL GUESTS DECLARE THEY ARE SENSITIVE TO SUSTAINABLE DEVELOPMENT<sup>3</sup>.**

Some 25 years after the concept first emerged, the notion of sustainable development has been appropriated by all segments of the population and seems well anchored in people’s minds: 76 % of hotel guests say they are familiar with the concept.

Awareness is widespread in France, where 94% of hotel guests say they are familiar with the concept. This very high score is not surprising given that French authorities have played a major role in building awareness of sustainability issues. In 2007, the Grenelle environmental summit did much to showcase the issue.

In Germany, the Green party was created in the late 1970s and the concept of “Nachaltige Entwicklung”(sustainable development) has achieved broad recognition.

In Brazil and China, there is a tendency to over-agree slightly with survey statements. Nonetheless, despite this trend, results are still very positive.

Lastly, hotel guests in the United Kingdom and Australia clearly seem to be less familiar with the concept of sustainable development: it is not a vocabulary issue, since precautions were taken to ensure that phrasing did not adversely impact the interviewees’ understanding. The result is consistent with other studies on the subject. In both countries, the concept of “sustainable development” (or “sustainability” or the related concept of “corporate social responsibility”) resonates only slightly with the public. However, this lack of familiarity with the concept is not reflected in the behavior of hotel guests in the two countries. The following results prove that in both Australia and the United Kingdom, customers say they are willing to modify their purchase criteria and their practices to take into account sustainability challenges.

*Have you ever heard of sustainability?*

Answer Yes:

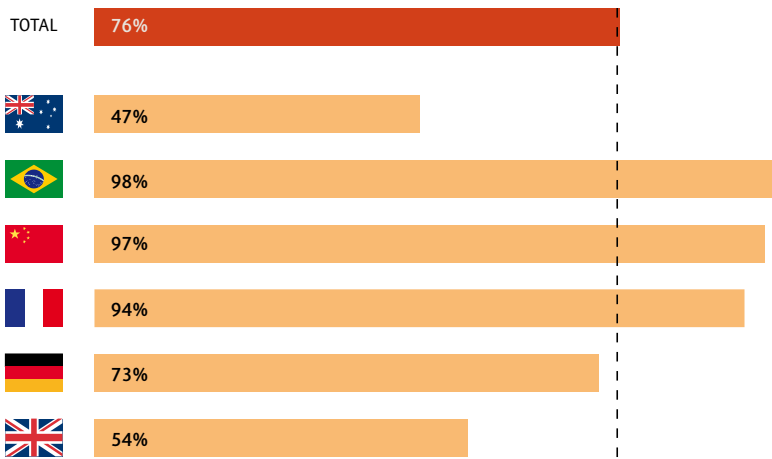


Figure 1a

**AS USED IN THE SURVEY, SUSTAINABLE DEVELOPMENT IS DEFINED AS**

a model of development for human activities that takes into account respect for the environment and people, for the well-being of all, both today and tomorrow.

## A higher awareness among certain guest profiles

Sustainable development is now a concept of which hotel guests are generally aware worldwide. However, it is interesting to analyze the nuances of that awareness, depending on socio-demographic criteria on one hand and hotel consumption habits on the other.

The first surprise is that, contrary to popular belief, men seem to be generally more aware of sustainable development. Although often perceived as closer to feminine sensibility, in the end the topic has had a greater impact on men. This finding is most certainly linked to the following one, which is that business guests — the majority of whom are still men — were found to be more concerned with the issue than leisure guests. Overall, 84% of business customers were aware of sustainable development compared with 72% of leisure customers.

Lastly, 18-34 year-olds have the highest awareness of sustainable development. This observation is probably related to the following corollary: guests that have a child under 18 - and who are often between 18 and 35 years old themselves - are more familiar with sustainable development. Consequently, one might suppose that having a child helps to raise awareness of sustainable development and generate concern about the challenges our planet faces.

The understanding of the concept also varies by hotel segment. Customers that frequent budget hotel seem to be particularly aware of sustainable development, which may be due to the fact that the segment's customers are younger on average.

### Have you ever heard of sustainable development?

Answer Yes:

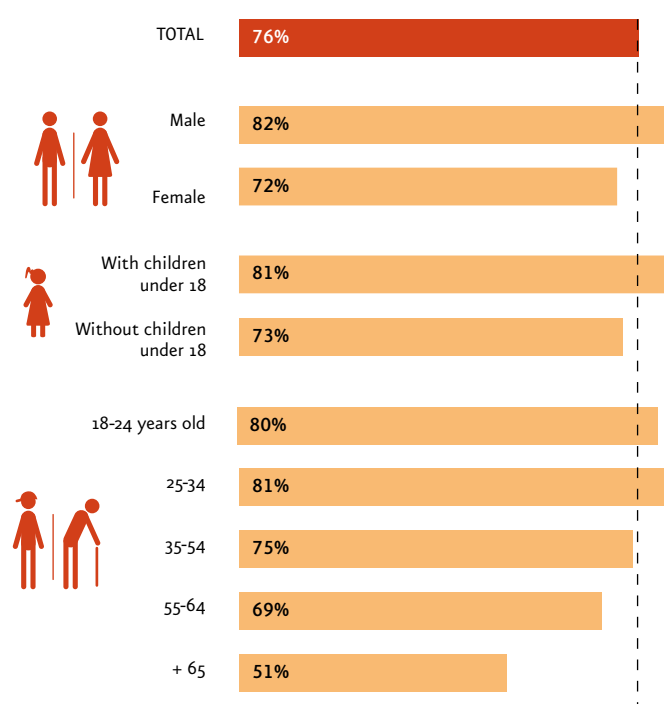


Figure 1b

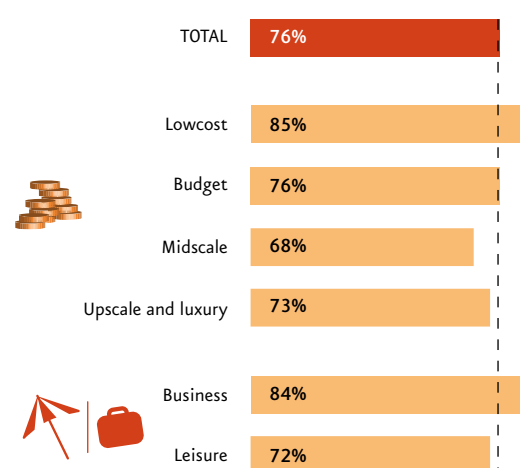


Figure 1c

### PROFILE OF THE TYPICAL HOTEL GUEST AWARE OF SUSTAINABLE DEVELOPMENT

- Male
- Age 18 to 34
- Has a child under than 18 years old
- Generally stays in budget hotels

## Key Learning #2 :

### **HIGH EXPECTATIONS CONCERNING CONCRETE ACTIONS IN FOUR KEY AREAS: WATER, ENERGY, WASTE AND CHILD PROTECTION.**

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*Beyond the geographical, cultural or economic differences of guests, there is a striking global convergence regarding their expectations on these topics. Guests want hotels to show commitment to concrete, daily aspects of sustainable development: water, energy, waste. They also appear very attentive to child protection, a hotel industry-specific topic that takes the form of the fight against child sex tourism.*

## TANGIBLE INITIATIVES

The survey indicates that guests are particularly attentive to negative externalities related directly to a hotel's activity. When asked spontaneously to mention their main concerns, hotel customers say they expect tangible initiatives on well-known topics that are generally associated with sustainable development: water consumption, energy savings and waste treatment.

Moreover, when several sustainable development-related subjects were given, these topics were still at the top of the ranking. Another issue that is closely associated with the hotel industry ranked third: protecting children. The awareness-building initiatives launched by the industry more than 15 years ago seem to have produced results.

*What sustainable development themes spontaneously come to mind when you think of the hotel industry?*

### Spontaneous answer

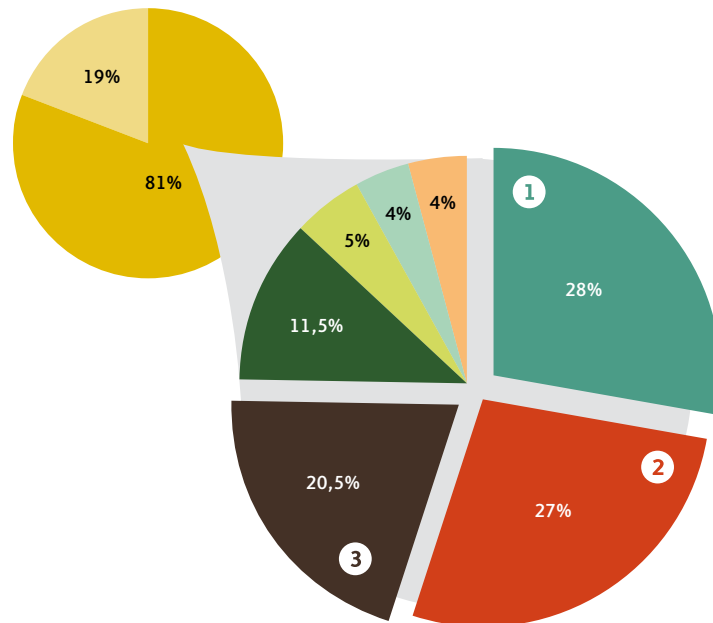


Figure 2a

### Assisted answer

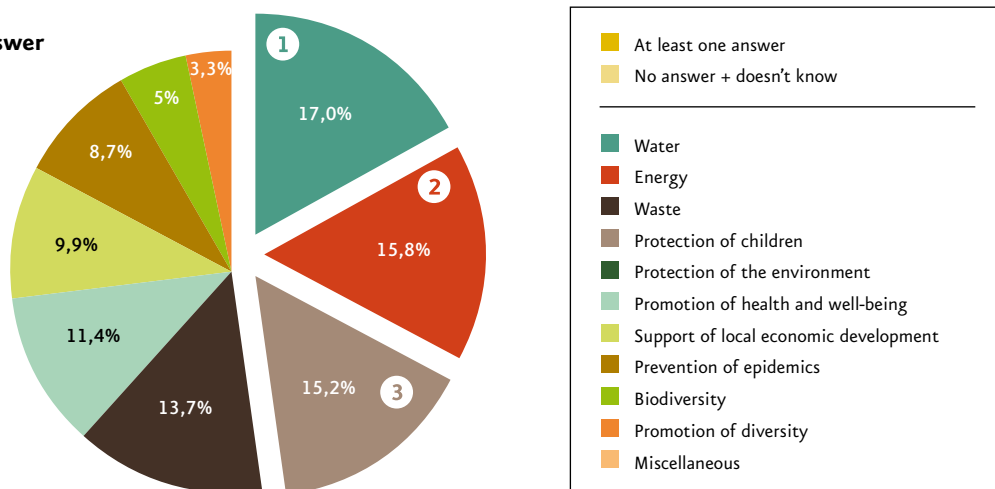


Figure 2b

TOTAL

## Minor yet revealing differences in country results

Despite strong convergence on the four key issues, when the results are analyzed country by country a number of differences appear that change the order in which the priorities are mentioned.

### What themes do you consider most important for a responsible hotel company?

Assisted ranking

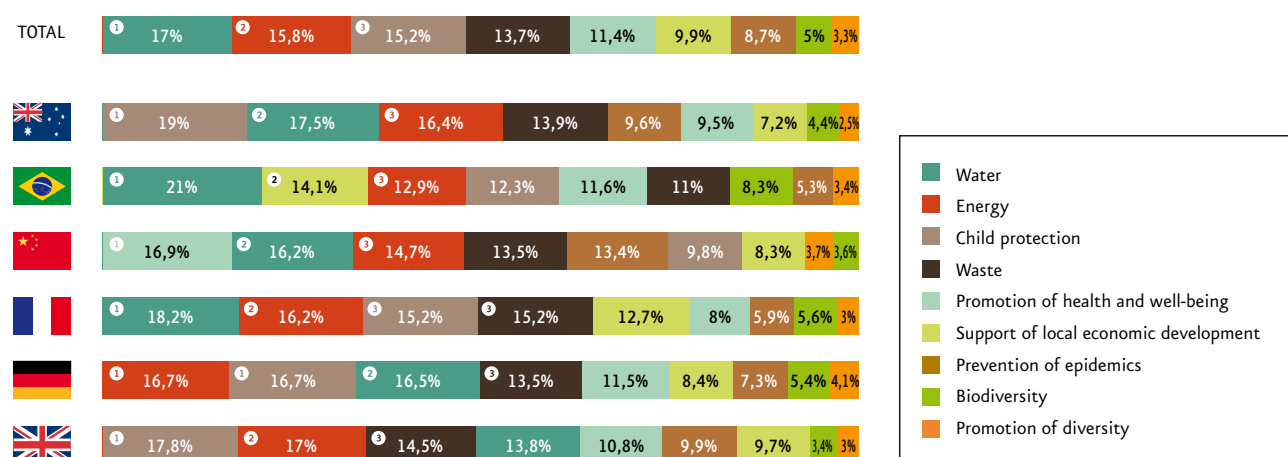


Figure 2c

**Protecting children** ranks first in Australia, Germany and the United Kingdom, while it is not even mentioned among the top three priorities for the two emerging markets, Brazil and China.

China stands apart because of the importance accorded to **health and well-being**. This result is logical given the culture of the country, where health - especially nutrition - is a central issue. Recent developments in the country confirm the importance of this issue, as the Chinese government has been working for several years to set up a health protection system.

Brazilian customers feel that **developing the local economy** is especially important. This is a very strong concern in a country highly focused on reducing inequalities.

Lastly, because of its daily visibility and the many awareness campaigns addressing the issue, **waste treatment** is very clearly identified and systematically listed among the priorities of the three European countries.

There is also strong convergence among the issues that appear at the bottom of the ranking. Protecting biodiversity and promoting diversity are almost systematically at the end of the list, with minor variations from one country to another. Although the term "biodiversity" is used more and more commonly, it remains a concept and a challenge that are difficult to fully comprehend. Its complexity explains to a certain extent the fact that it is given less importance by interviewees. Regarding these two issues, the study reveals the need to keep informing and involving people in order to raise their awareness of and commitment to meeting these challenges.

### THE TOP PRIORITIES VARY SLIGHTLY FROM ONE COUNTRY TO ANOTHER

- **Protection of children** ranks first in Australia, Germany and the United Kingdom.
- The issue of **waste** is seen as very important in the 3 European countries.
- China stands apart due to the great importance accorded to **health and well-being**.
- Brazil differs from the other countries because of the importance given to **local economic development**.



## Key Learning #2

### **GUESTS CONSIDER THEMSELVES AN ESSENTIAL LINK IN THE CHAIN OF SUSTAINABLE DEVELOPMENT.**

*1 out of 3 guests considers that citizens are the first responsible in terms of sustainable development. Hotel guests seem aware of their impact in terms of social, corporate and environmental responsibility. Governments and companies are also considered to have a critical responsibility.*



# A SHARED RESPONSIBILITY

The government-citizen-corporation triangle is identified as responsible for promoting and implementing sustainable development. Hotel guests first mention their own responsibility, although they feel that national governments, cited in first position by 32% of interviewees, are responsible as well.

Customers have especially high expectations of large companies, which rank third. The study clearly shows that public opinion around the world expects corporations to demonstrate a real commitment on the frontline. Citizens, governments and companies are thus the three stakeholder groups that hotel customers feel must join forces to promote and accelerate the deployment of sustainable development initiatives.

*In your opinion, sustainable development is mainly the responsibility of...*

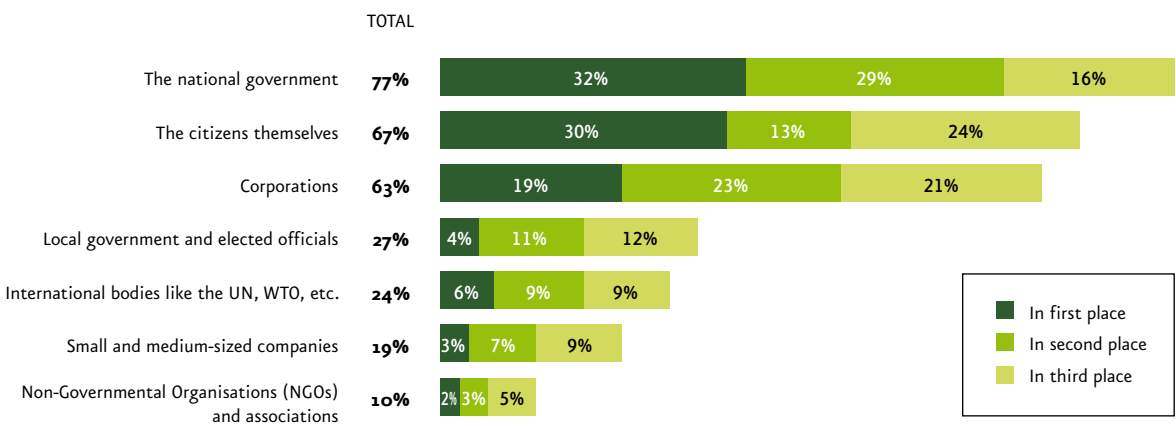


Figure 3a





## The time to act is now!

Another interesting observation is that survey respondents placed NGOs and international organizations last on the scale of responsibility for sustainable development issues. This finding seems to indicate that the time for enhancing awareness and encouraging action has passed. Guests now expect practical measures to which they can make a significant contribution. Logically, local players appear to have limited responsibility. Community authorities and elected officials were mentioned in first, second or third position by only 27% of customers, although this does not in any way minimize their role in deploying effective sustainable development initiatives.

## Cultural differences in terms of responsibilities

*In your opinion, sustainable development is above all the responsibility of...*

*Total mentions in either first, second or third position.*







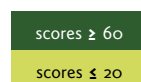
	TOTAL						
The national government	77%	73%	74%	62%	72%	86%	89%
The citizens themselves	67%	72%	74%	56%	57%	81%	57%
Corporations	63%	55%	65%	67%	73%	58%	67%
Local government and elected officials	27%	29%	13%	29%	34%	38%	22%
International bodies like the UN, WTO, etc.	24%	19%	26%	25%	24%	17%	31%
Small and medium-sized companies	19%	13%	20%	29%	27%	11%	21%
Non-Governmental Organisations (NGOs) and associations	10%	11%	7%	11%	14%	9%	12%

Figure 3b



Cultural differences seem to influence the order of priority in which respondents place those they see as primarily responsible for sustainable development.

The national government and individual citizens topped the list in France, Germany and Brazil. In these three countries, respondents widely insisted on their own role in the process, with results above 70%, and over 80% in Brazil.

In the two Anglo-Saxon countries, on the other hand, guests attribute almost equal responsibility to corporations and governments, and **only one out of two respondents believes that individual citizens are responsible for sustainable development.**

Finally, China's profile differs from the others, with the government solidly at the top of the list, followed by private corporations.

# Key Learning #4

## **HOTEL GUESTS DECLARE THEY ARE READY TO ACT AND CHANGE THEIR BEHAVIOR.**

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*Virtually unknown 20 years ago, sustainable development is now often taken into consideration by one in two guests when choosing a hotel. This criterion still has a significant growth rate but should progress considerably due to guests' evolving expectations and the sector's increasingly numerous initiatives.*



## SUSTAINABLE DEVELOPMENT IS A MAJOR CRITERION WHEN CHOOSING A HOTEL

Globally, one in two guests claim to frequently take sustainability into account when choosing a hotel. However, this result is boosted by responses from Chinese and Brazilian customers.

Nonetheless, in the other four countries covered by the survey, four customers out of ten say that they always or often take sustainable development into account. Budget and luxury segment guests, both of whom are also highly aware of the issue, emerge from the survey as the most attentive to this criterion when choosing their hotel.

*How often do you take sustainable development into account when choosing a hotel?*

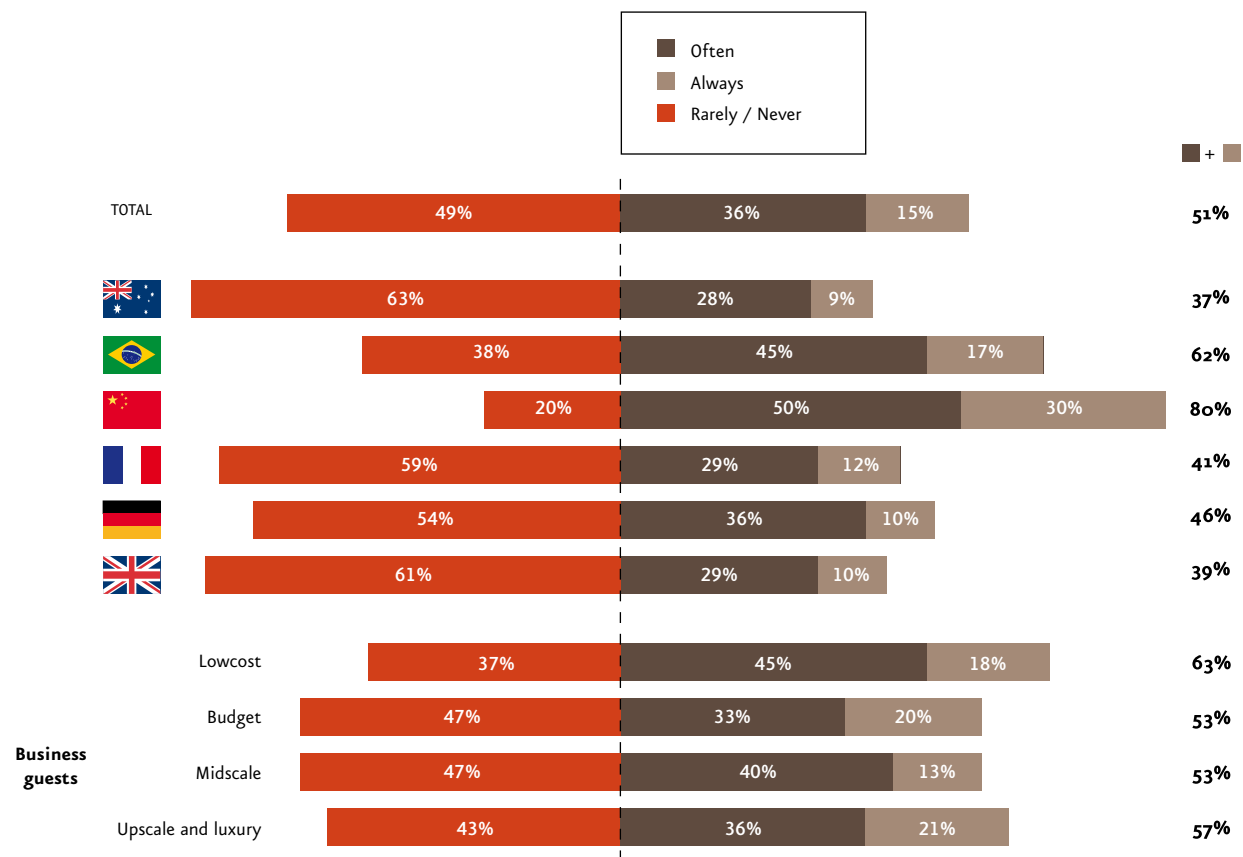


Figure 4a

## Sustainable development: a new preference criterion

In order to stay in a hotel that offers actions or services in favor of sustainable development:

- Nearly 7 out of 10 customers say that they rather or fully agree to stay at a hotel that is a little less well located. More specifically, nearly 2 out of 10 guests fully agree.
- Nearly 7 out of 10 guests rather or fully accept the idea that the hotel will be a little more expensive. More specifically, 2 out of 10 guests say that they fully accept the idea of paying more.

Guests thus claim that they are ready to make a certain number of concessions if the hotel takes action in favor of sustainable development. While these declarations should not be taken at face value and the figures should be viewed guardedly from one country to another, these results nonetheless attest to a real change in attitudes.

### *If a hotel implemented policies or services in favor of sustainable development,*

*would you easily accept the idea that it might be a little less well localized?*

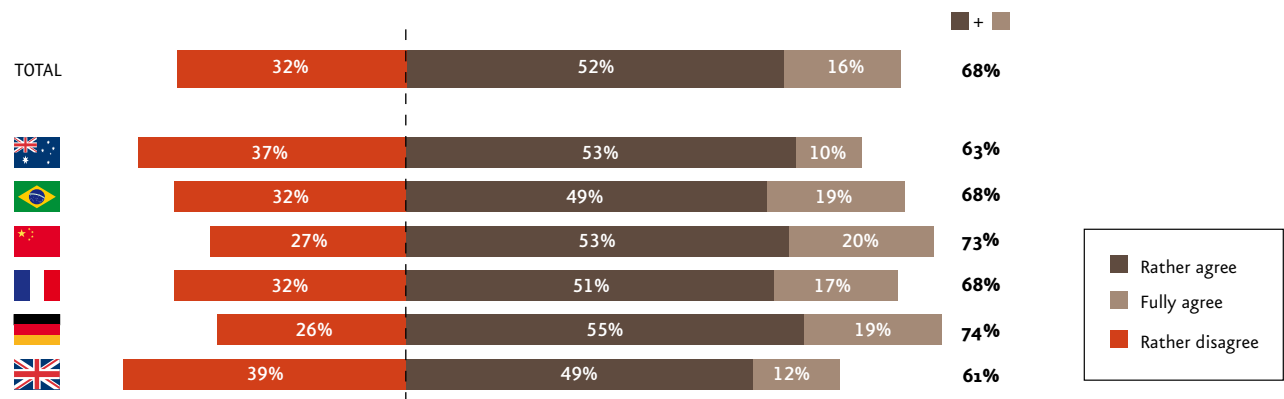


Figure 4b

*would you easily accept the idea that it might cost a little more?*

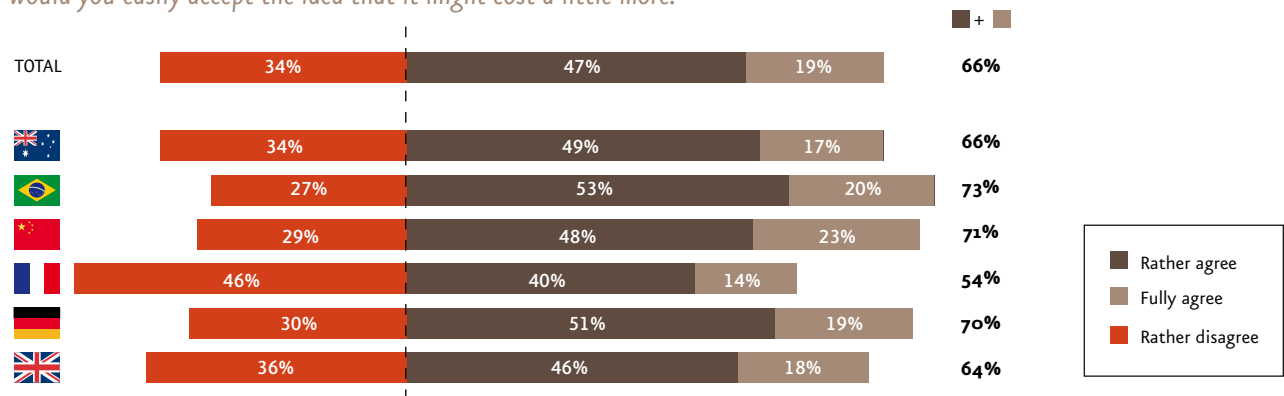


Figure 4c

## Sustainable hotels are comfortable

For a long time, sustainable development in the hotel industry was seen as synonymous with a lack of comfort. Apparently those days are now over. Gone are the caricatured images of jute sheets and fair trade dishwater coffee. Customers now look favorably on the alliance of sustainability and comfort. The survey shows that 66% of customers do not expect to find a lack of comfort in a hotel that has implemented sustainable development actions, although approximately one out of two guests in China and Germany have lingering doubts on the subject.

*If a hotel implemented policies or services in favor of sustainable development, would you expect it to be less comfortable?*

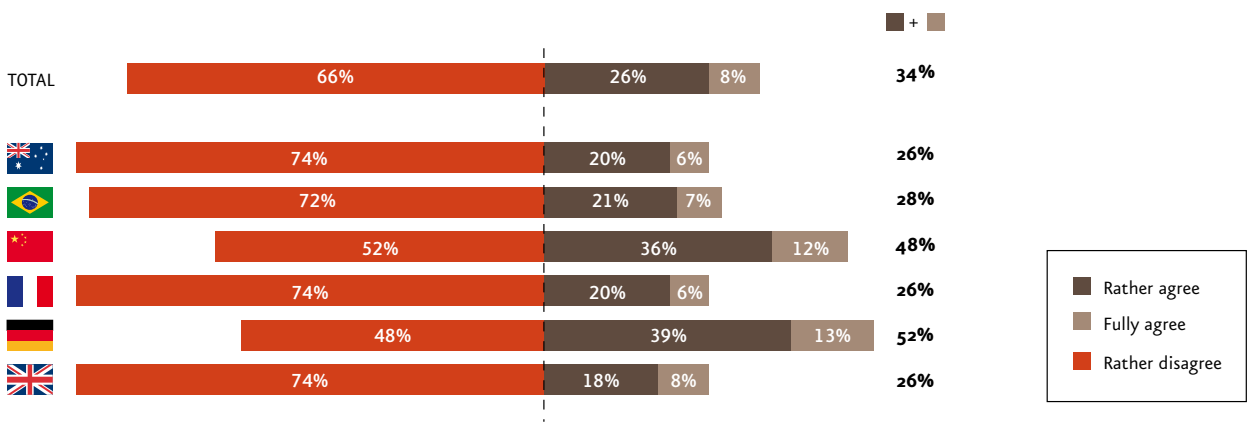


Figure 4d



## Customers are aware of their role in contributing to sustainable hospitality

While guests consider themselves an essential link in the chain of sustainable development - alongside corporations and governments - they also appear to be aware of their role in supporting the development of sustainable hotels. A majority says that they are as concerned about sustainable development when staying at the hotel as they are at home. However, **a significant 12% say that they are more aware of sustainability issues when staying at a hotel**. Could this mean that the hotel is a special venue for raising awareness and providing information about sustainable development challenges?

*When staying at a hotel, do you feel as though you behave more, equally or rather less concerned with sustainability than when you are at home?*

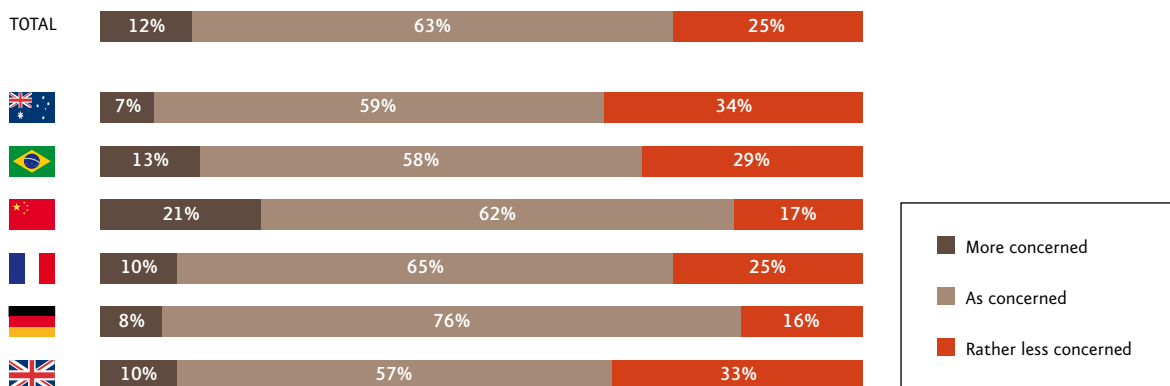


Figure 4f

### HOTEL GUESTS: ACTIVE CONSUMERS!

#### Air-conditioning

51% of customers want their room to be at the right temperature when they enter. Paradoxically, 93% are in favor (of which 62% completely in favor) of regulating the air-conditioning themselves, even if that means waiting a few minutes before the room reaches the desired temperature.

To a lesser extent, the same paradox exists with regard to **lighting**. When customer are asked whether they want to find the lights on when they enter their room, 25% say yes. But when asked if they would accept to have the lights off upon entering, 96% answer in the affirmative (with 75% completely favorable).

How to explain this contradiction? It seems that guests are ready to make an effort regarding their comfort as long as they are not required to do so. They want to be able to make the decision themselves and be an active player of the concession. In other words, customers have indicated that they want to contribute and play an active role in protecting the environment.

# CONCLUSION

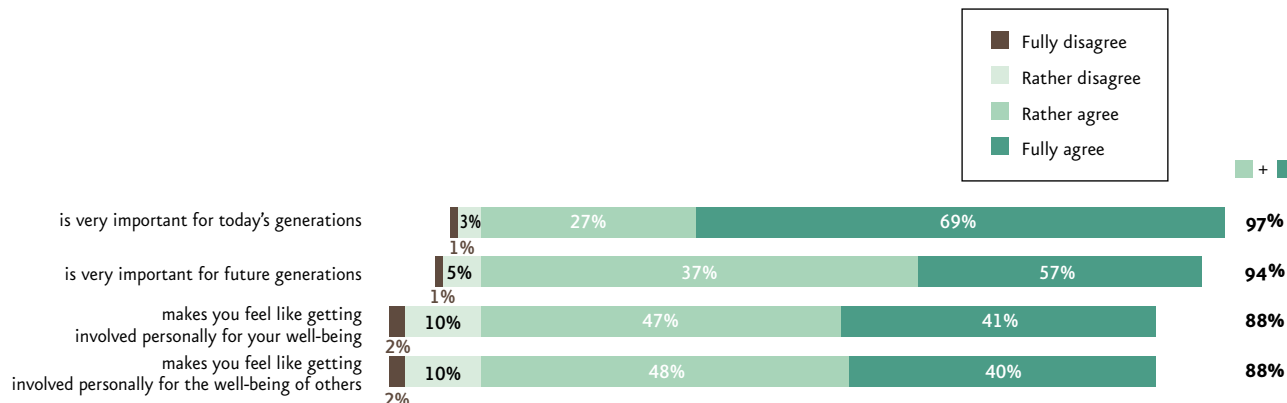
The findings of Earth Guest Research's first international tracking study highlight a message that is clear and converging: sustainable development is an increasingly visible criterion in the choices and behavior of hotel guests, regardless of their nationality. Guests are very familiar with the subject, despite disparities related to gender, age and hotel category. Among this highly aware population, the main areas of concern are surprisingly similar and demand a pragmatic approach. Customers feel involved in this call to action since they see themselves as an integral part of the responsibility triangle in improving the taking into account of sustainable development. How? By integrating sustainability criteria into their choices and requirements regarding hotels, starting today, as guests appreciate the urgency of the situation.





## SUSTAINABLE DEVELOPMENT IN HOSPITALITY IS FOR TODAY

### *Sustainable development ...*



According to the definition proposed in 1987 in the Brundtland Report prepared by the UN's World Commission on Environment and Development, sustainable development is "development that meets the needs of the present without compromising the ability of future generations to meet their own needs."

Some 25 years later, hotel guests provide additional insight into this definition. While previously centered on the current generation's responsibility to future generations, the definition seems to have evolved. Sustainability is crucially important right now for today's generations.

Broadly aware of the concept, guests say that they increasingly consider responsibility criteria when choosing a hotel, even if it means staying in a less central location or paying a bit more.

**However, their statements should be approached with caution as hotel guests are still full of contradictions.** All Accor hoteliers would agree that the temptation to indulge in abundance and carefree living is strong for hotel customers. Today, the role of hoteliers is to find ways to go even further, to build a more responsible hotel industry without forcing constraints on customers and while giving them the choice to participate or not.

Hoteliers can enable customers to participate in a number of ways.

### ***Present the commitments in a clear, instructive manner***

In Asia, for example, shark fin soup is a delicacy that is much appreciated for important occasions. However, the consumption of shark fin soup encourages over-fishing of the shark, an endangered species that is a key link in the marine food chain and ecosystems. In China, restaurants in Accor hotels now provide customers with information on the subject and have removed the soup from menus. Today, 63% of Accor hotels in the country no longer serve shark fin soup. Guests support this approach and accept alternative menu choices. This initiative proves that it is possible to bring about behavioral change through positive reinforcement rather than moralistic preaching. To win customer support and commitment, hoteliers should devise attractive, acceptable alternatives. In a memo circulated in March 2011, the French government's Center for Strategic Analysis encouraged "nudging" to promote environmentally friendly consumer habits. Developed from the behavioral sciences, this approach is intended to encourage individuals to make choices that are in the general interest without giving them orders or making them feel guilty. These incentives are already widely used in the United States to reduce energy use and polluting emissions. The concept is now being adapted by hotels to involve customers in the development of a more responsible hospitality industry.



## Create differentiation and value for the brands

In 1962, Motel 6 revolutionized the economy hotel segment with the introduction of a clean, comfortable motel room for \$6 a night. In 2010, Motel 6 once again pioneered in its segment. In recognition of its sustainable development initiatives, the chain was awarded LEED environmental certification, a highly demanding program that is a reference in terms of sustainable building techniques. This achievement shows that even in the budget segment it is possible to design environmentally friendly buildings without undermining the chain's financial performance.

In the hotel industry, as in other sectors, the challenge lies in creating differentiation that creates value, preference and loyalty among guests. Sustainability is playing an ever greater role in meeting that challenge.

Applied to the hospitality industry, sustainable development makes it easier to manage and respond proactively to the rising cost of natural resources and increasingly strict regulatory requirements.

Sustainable development not only contributes to efficient hotel management. It also serves as a vector for enhancing the value of hotel brands. Indeed, this approach encourages innovation and improves customer service by enabling organic breakfasts, balanced meals and responsible seminars, as well as by strengthening employee commitment and motivation. These first signs of change in the hotel offering prefigure more important innovations yet to come.

## REINVENTING HOTELS... SUSTAINABLY

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Accor is committed to reinventing hotels... sustainably. Identifying and developing innovative, sustainable business models has become a necessity. The process will lead - or require - the industry to create hotel, restaurant and service offerings that integrate new economic, social and environmental imperatives.

This ambitious goal is taking shape today through a growing number of pilot projects, for example in the area of sustainable construction and renovation, and through new more environmentally friendly technologies, often referred to as clean techs. In Australia, the Pullman Sydney that opened in 2008 consumes 40% less energy than a standard hotel, thanks to its high-performance heating and air-conditioning systems. In France, the franchised Troyes Centre all seasons hotel that opened in late 2010 was designed in line with France's HQE® environmental standards and has been awarded the BBC-Effinergie® energy-efficiency label. As a result, energy consumption has been reduced by 50%. Also in France, a number of pilot hotels are currently testing a thermodynamic composter that transforms organic waste quickly and odorlessly into fertilizer.

Reinventing hotels sustainably is an exciting adventure that represents a top priority for Accor's development strategy. To succeed, the Group firmly believes in the need for collective action, which is why it created the Earth Guest Research platform. This vision is fundamental. It energizes the company to pursue continuous improvement, which can only be real if it is shared.

Reinventing hotels sustainably is a critical challenge. In response, the hotel industry can rely more on customers, who - as this study shows - are ready and willing to play their part as a key link in the chain that is supporting the development of responsible hotels.

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