Responsible guests are looking for sustainable hotels

Guest habits and expectations of hotels in terms of sustainable development: international report

April 2016
ACCORHOTELS IS A GROUP UNITED BY A SINGLE PASSION, HOSPITALITY, AND SUSTAINED BY A SINGLE PROMISE: FEEL WELCOME.

More than 190,000 women and men take care of thousands of guests in the 3,900 AccorHotels brand hotels spread throughout more than 90 countries.

AccorHotels is the world’s largest hotel operator, providing its guests, partners, and employees with:

- its double expertise as operator/franchiser (HotelServices) and owner/investor (HotelInvest).
- a large portfolio of internationally famous brands ranging from luxury hotels (Sofitel, Pullman, MGallery by Sofitel, Grand Mercure, The Sebel) to economic hotels (ibis, ibis Styles, ibis budget, adagio access, and hotelF1), with midscale hotels in between (Novotel, Mercure, Mama Shelter, Adagio).
- the strength of its market position and its Le Club AccorHotels loyalty programme.
- an almost 50-year commitment to being a socially responsible company with its Planet 21 programme.
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Introduction
Introduction

TOWARDS MORE SUSTAINABLE HOTELS

CONTINUING DOWN THE PATH WE’VE CHOSEN
AccorHotels has been actively pursuing sustainable hotel management practices for more than 20 years in order to protect people and the environment. In this context, AccorHotels published its first large-scale international barometer study, “SUSTAINABLE HOTELS: READY TO CHECK IN?” in June 2011.

As a return to this unprecedented initiative, AccorHotels is today publishing the results of a new survey, carried out at the end of 2015. This survey aimed to measure changes in guests’ behaviours and current awareness of sustainable development.

COLLABORATING WITH GUESTS
AccorHotels’ number one priority is expressed in its value of “Passion for guests”, i.e. it is to satisfy guests and to bring the promise Feel Welcome, another Group motto, to life.

AccorHotels believes that guests must be fully involved in its actions to effectively and sustainably protect mankind and the environment. That is why it is essential to understand their ideals and their expectations.

A barometer study to:

UNDERSTAND guests’ attitudes and habits in relation to promoting sustainable development in their own daily lives

COMPARE their eco-responsible behaviours when they are at home and when they stay in a hotel

MEASURE guests’ awareness and preferences in terms of the various responsible actions that have been planned

DESIGNING A STRATEGY FOR THE FUTURE
The goal of this guest study is to give AccorHotels some food for thought as it prepares the 2016-2020 chapter of the Planet 21 programme. This barometer study is really a tool to support the decision-making process, allowing AccorHotels to define its development strategy’s guiding principles over the next four years.

PLANET 21 2016-2020, TOWARDS POSITIVE HOSPITALITY
For AccorHotels, hospitality is always positive. Its pioneering commitment is to always use respect as its guide. Respect for the planet and its inhabitants, whether that means its employees, its guests, or its partners. Respect for the communities around it, for the laws and regulations that govern the countries where the Group has a presence. With its “Ethics and Corporate Social Responsibility” Charter as its guide, AccorHotels has redefined its new responsibility programme. Simple, readable, and always demanding, it reaffirms the Group’s ambition and gives meaning and pride to each one of its actions.
SUSTAINABLE DEVELOPMENT, A SECTOR-WIDE CONCERN

ECO-RESPONSIBLE HOTEL MANAGEMENT: A COLLECTIVE CHALLENGE

Convinced that eco-responsible hotel management is a collective concern, AccorHotels hopes to help all sector players make progress in the pursuit of sustainable development.

That is why it encourages an open approach and the sharing of knowledge, tools, and best practices to promote comprehensive commitment in the hotel industry.

The entire hotel sector needs to act together to create a real positive impact.

AN OPEN SOURCE APPROACH

The barometer study’s methodology will be accessible to any sector player who requests it, so that they may renew the barometer study, or carry one out in a new country. There is only one condition: that they share the results freely, as AccorHotels is doing today.

ACCORHOTELS, DRIVING JOINT ACTION

In 2011, AccorHotels created, Planet 21 Research, a platform for sharing information about sustainable development in the hotel industry, which is open to anyone free of charge.

By publishing this study on its Planet 21 Research platform, AccorHotels is contributing to knowledge sharing and asserting its place as the world’s leading hotel operator.
RESPONSIBLE GUESTS ARE LOOKING FOR SUSTAINABLE HOTELS

Methodology

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Methodology

This study faithfully respects the scientific and ethical principles of survey-based studies.

A PANEL CHOSEN FROM AMONG ACCORHOTELS GUESTS

A QUALIFIED PANEL
The study was carried out using representative samples from guest lists drawn from all of the Group’s brands, from the cheapest economic hotels to the most luxurious ones.

AccorHotels decided to survey its guests, a population that is used to staying in hotels, in order to constitute a panel that would be more specialised, more qualified, and that would thereby guarantee the suitability of the individuals questioned about the subject at hand.

A PANEL REPRESENTING THE MARKET AS A WHOLE
AccorHotels guests are also guests at other hotel chains, and are therefore representative of the hotels market as a whole.

DEFINITIONS USED AS PART OF THE STUDY PARAMETERS

Hotel Guest: a person that has spent at least one night in a hotel over the last 12 months

Class of hotels visited: the kind of hotel in which the guest has spent the greatest number of nights

Reason for stay (business or pleasure): the main reason that the guest stayed in a hotel over the last 12 months

Respondents are frequent travellers: 57% had stayed in hotels more than 10 times over the previous year. They are therefore a good source of information on current and future market trends.

A UNIQUE CONTEXT
The survey was carried out in November 2015, 3 weeks before the COP 21 talks. This global climate conference put sustainable development in the media spotlight for several weeks.
MORE THAN 7,000 HOTEL GUESTS IN 7 COUNTRIES

7,913 questionnaires were collected, creating a solid base for drawing relevant conclusions about each country.

The 7 countries included in the survey were Germany, Australia, Brazil, the United States, France, Indonesia, and the United Kingdom.

This selection provided an interesting overview of different situations around the world with:

- **Different cultures**
  - romance (Brazil, France)
  - Anglo-Saxon (United Kingdom, United States, Australia)
  - Asian (Indonesia)

- **Varied levels of economic development**
  - mature countries (Germany, Australia, United States, France, United Kingdom)
  - emerging ones (Brazil, Indonesia)

- **Unequal engagements with environmental realities**
  - countries that are already feeling the effects of climate change, such as Australia and Indonesia

COLLECTING RESULTS

The representative nature of each sample was ensured using the quota method. To guarantee that the results were the best expression of real market trends, it was necessary to collect information about respondents’ gender, country of origin, and the class of hotels visited.

Each one of the 7 countries and 3 hotel classes is presented separately in the responses. The results were readjusted to represent 60% men and 40% women.

A STUDY CARRIED OUT AS PART OF A CONTINUOUS EFFORT

Convinced of the importance of tracking trends over time, AccorHotels carried out this new barometer study in line with the methodology used for the previous study.

This new survey was designed and carried out entirely internally. AccorHotels teams prepared the questionnaire and analysed the results. AccorHotels benefited from the skills and experience of those Group employees who are dedicated to consumer studies of the hotel industry. Impartiality was guaranteed by industry ethics standards as well as by the autonomy of the Consumer & Market Insight department, which oversaw the survey.
Finding 1
Finding 1

SUSTAINABLE DEVELOPMENT IN ACTION: GUESTS ARE AWARE OF THE NEED FOR ACTION ON A DAILY BASIS

In the eyes of hotel guests, sustainable development is not only a familiar concept, it has actually become an important issue. Even if the degree of involvement varies according to culture, age, and gender, sustainable development is today definitively present in guests’ daily lives in the form of concrete and eco-responsible actions.

GUESTS ARE INVOLVED IN SUSTAINABLE DEVELOPMENT IN THEIR DAILY LIVES

A CONSENSUS ON THE NEED FOR ACTION
In 2011, the barometer study showed that 76% of hotel guests were familiar with the idea of sustainable development.

Today, sustainable development is still widely seen as a critical issue. Two thirds of hotel guests completely agree that future generations will be threatened if nothing is done today to protect the planet.

A CERTAIN PESSIMISM ABOUT THE MEANS AVAILABLE TO ARRIVE AT THIS GOAL
Guests are therefore aware of the need to protect the planet now, but they are pessimistic about the means available to arrive at this goal. Less than half of guests think that individual actions have a real positive impact on environmental protection.

A RANGE OF ACTIONS THAT HAVE BECOME A PART OF DAILY LIFE
Sustainable development is today a permanent part of daily life hotel guests, through a wide array of eco-responsible actions. Guests are generally inclined to:

• better manage their waste,
• reduce their energy consumption,
• and consume local, wholesome products.
DEFINITION OF SUSTAINABLE DEVELOPMENT USED IN THE BAROMETER STUDY
Sustainable development is a mode of developing human activities that takes protecting the environment and human populations into account to promote the well-being of all both today and in the future.
THREE AREAS OF ACTION THAT ARE A PART OF GUESTS’ DAILY LIVES

BETTER MANAGING THEIR WASTE

Sorting waste
Waste sorting, which is the most emblematic form of sustainable development on the individual level, is widely integrated into hotel guests’ behaviour.

Limiting food waste
Guests are aware that waste management is a key issue in terms of sustainable development. They are particularly careful to not throw away food.

REDUCING THEIR ENERGY CONSUMPTION

Purchasing energy efficient appliances
Reducing energy consumption is an important green behaviour, and it can notably be achieved by purchasing energy efficient appliances. Energy efficiency is a subject that is as important to woman as it is to men, across all age groups.

Turning off electric appliances
The collected responses show that limiting energy waste is not yet a universal behaviour. Barely a third of guests say that they always turn off their appliances when they are not in use, rather than leaving them on standby.

CONSUMING LOCAL AND WHOLESOME PRODUCTS

Protecting health
Hotel guests pay attention to the impact that products will have on their health. Only 3% don’t pay any attention to this issue.

Favouring local products
The barometer study reveals that guests pay a lot of attention to the products that they purchase. Overall, they favour consuming local products, which has led to a global trend of returning to local distribution networks.

Eating organic food
This overarching trend of consumption awareness has notably lead to people purchasing organic food. Guests are ready to buy organic produce, even if that means paying more.

more than 80% of guests say that they avoid wasting food at home and that they sort their waste

more than 25% of guests say that they often buy organic produce, even if it is more expensive than conventional produce
NOTABLE DIFFERENCES BETWEEN DIFFERENT GUEST PROFILES

WOMAN AND YOUNG PEOPLE FEEL MORE INVOLVED

Women feel more involved in sustainable development than men, and young guests feel more involved than their elders.

YOU TURN OFF YOUR ELECTRIC APPLIANCES INSTEAD OF LEAVING THEM ON STANDBY:

- **Overall:** 29%
  - Women: 33%
  - Men: 26%
  - 18-29: 37%
  - 60+: 27%

For each question, women consistently responded in a more eco-responsible manner. They tend to place more importance on individual action than men do, and they feel guiltier when they think their behaviour is having a negative impact on the environment.

In the same way, young “Millennials” between 18 and 29 years of age seem to pay more attention to sustainable development than their elders. This is also shown in their behaviours. They are more likely, for example, to consume organic produce, even when it is more expensive, and they are more likely to turn off their electric appliances.
There were no significant differences observed based on the class of hotels visited. The trends are the same for guests at economic brand hotels, midscale hotels, and upscale and luxury hotels.
Finding 2
Finding 2

SUSTAINABLE DEVELOPMENT, JUST LIKE AT HOME: GUESTS ARE READY TO CONTINUE THE ECO-RESPONSIBLE ACTIONS THAT ARE PART OF THEIR DAILY LIVES WHEN THEY ARE AT A HOTEL

The barometer study reveals that guests do not always consider sustainable development as a determining factor when reserving a hotel room. On the other hand, they voluntarily continue the eco-responsible actions that are already part of their daily life. They are ready to pay more, but they expect that hotels make their own commitments to sustainable development.

CHOOSING A HOTEL THROUGH THE LENS OF SUSTAINABLE DEVELOPMENT?

ECO-RESPONSIBLE HOTELS: A DISTINCTIVE, BUT NOT YET DECISIVE LABEL

As in 2011, sustainable development is not an independent deciding factor when guests reserve a night in a hotel.

This does not mean that guests do not associate hotels with sustainable development: only 7% do not consider sustainable development at all when they stay in a hotel.

However, more than 20% of guests always take sustainable development into account when purchasing other products or services such as appliances, food, cleaning products, or even cars.
WHEN YOU PURCHASE THE FOLLOWING PRODUCTS OR SERVICES, WOULD YOU SAY THAT SUSTAINABLE DEVELOPMENT IS:

- 32% • Appliances
- 27% • Food products
- 24% • Cars
- 23% • Cleaning, household, or gardening products
- 20% • Personal hygiene products and cosmetics
- 13% • Home repair products (glue, paint)
- 12% • Clothes

SUSTAINABLE DEVELOPMENT, AT WHAT COST?

IF A HOTEL HAS TAKEN STEPS TO PROTECT THE ENVIRONMENT (FOR EXAMPLE: USING ORGANIC PRODUCE, OBTAINING LABELS FOR HOTELS THAT PRODUCE LITTLE WASTE OR HAVE LOW CARBON EMISSIONS, USING ECO-FRIENDLY PRODUCTS, SERVING ECO-FRIENDLY FOOD, ETC.):

- 33% • You would easily agree to pay a little more
- 45% • You would accept the idea that it might be less well located
- 57% • You would expect that the hotel would be less comfortable

Luxury & Upscale Brands: 6%
Eco: 11%
NO COMPROMISING LOCATION OR COMFORT

The hotel industry is built on pleasure and comfort. Guests are therefore not ready to sacrifice the convenient aspects of their stay just to have more eco-responsible hotels. Less than 10% of guests are entirely ready to accept an inferior location or reduced comfort to stay in a hotel that has implemented eco-responsible measures.

FRENCH GUESTS ARE THE LEAST LIKELY TO ACCEPT REDUCED COMFORT IN EXCHANGE FOR ECO-RESPONSIBLE POLICIES:

50% 50% of French guests completely disagree with this idea, compared to an average of 36%.

A HIGHER PRICE, WHY NOT?

If a hotel takes steps to promote sustainable development, guests are more likely to accept higher rates than they are to accept reduced comfort or a less convenient location.

Two of three guests say that they are ready to pay slightly higher rates if the hotel undertakes eco-responsible actions, such as offering organic or green products, or if the hotel has received low waste or low carbon emissions labels.

Surprisingly, economic hotel guests are as likely as upscale and luxury guests to accept higher prices for a more eco-responsible hotel.
A HOTEL THAT’S JUST LIKE HOME

EXTENDING DAILY ACTIONS TO THE HOTEL

An overall trend

The barometer study allows us to observe that guests have the same eco-responsible behaviours at home as they do when they stay at a hotel.

Some variations based on guest profile

Guests who consider sustainable development when they are choosing a hotel tend to act more eco-responsibly when at a hotel, but not much more than those who do not think that sustainable development is important when making a purchase. Young people, from 18-29 years old, are much more likely think about sustainable development at a hotel than they are when at home.

BEING ABLE TO COUNT ON SUFFICIENT FACILITIES

Even away from home, guests retain the same level of commitment. They want to continue their concrete daily actions, even when they are travelling.

Guests are therefore looking for solutions that make it easy for them to act responsibly. They want hotels to allow them to continue their daily habits: sorting waste, reducing energy consumption, using healthy products, consuming local products, limiting food waste, etc.

WHEN YOU STAY AT A HOTEL, DO YOU FEEL:

MORE concerned with sustainable development than when you are at home

JUST AS CONCERNED with sustainable development as when you are at home

LESS concerned with sustainable development than when you are at home

Indonesia: 28%
18-29: 16%
60+: 4%
Germany: 3%

WHAT ARE THE ACTIONS THAT YOU WOULD BE READY TO UNDERTAKE DURING YOUR STAY IN A HOTEL?

- Receiving bills by e-mail and not on paper
- Sorting waste in your room and in the lobby
- Receiving limited cleaning services (for example, having the bed made, but not having the room cleaned)
- Eating smaller portions to avoid wasting food
- When you leave the hotel, giving the pocket change you no longer need to an NGO
- Asking for doggy bags to avoid wasting food
- Rounding your bill up to the next euro and giving the difference to an NGO
- None of these
Finding 3

RESPONSIBLE GUESTS ARE LOOKING FOR SUSTAINABLE HOTELS
Finding 3

SUSTAINABLE DEVELOPMENT ON EVERY FRONT: GUESTS EXPECT THAT HOTELS’ COMMITMENT BE TRANSLATED INTO CONCRETE MEASURES

More than 2 out of 3 guests believe that protecting children from prostitution is a priority. Generally speaking, measures that are a part of the local context are widely supported by guests. They appreciate the sustainable development actions that are similar to those that are a part of their daily lives, such as consuming and using eco-responsible products.

GUESTS SUPPORT ACTIONS THAT ARE A PART OF THE LOCAL CONTEXT

HOW IMPORTANT DO YOU THINK IT IS FOR HOTELS TO BE INVOLVED IN THE FOLLOWING LOCAL ACTIONS:

- VERY IMPORTANT
- IMPORTANT
- NOT VERY IMPORTANT, OR NOT AT ALL IMPORTANT

<table>
<thead>
<tr>
<th>Action</th>
<th>Very Important</th>
<th>Important</th>
<th>Not Very Important or Not at All Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protecting children and minors from prostitution</td>
<td>68%</td>
<td>21%</td>
<td>11%</td>
</tr>
<tr>
<td>Promoting the local economy (promoting local job creation, training local workers, etc.)</td>
<td>48%</td>
<td>37%</td>
<td>15%</td>
</tr>
<tr>
<td>Protecting the environment (planting trees, cleaning beaches/rivers, protecting biodiversity, etc.)</td>
<td>48%</td>
<td>37%</td>
<td>15%</td>
</tr>
<tr>
<td>Promoting/protecting local culture/heritage</td>
<td>42%</td>
<td>43%</td>
<td>15%</td>
</tr>
<tr>
<td>Supporting local communities (disadvantaged populations, indigenous peoples, etc.)</td>
<td>36%</td>
<td>42%</td>
<td>22%</td>
</tr>
<tr>
<td>Partnerships with local NGOs (charity organisations, human rights organisations, environmental protection organisations)</td>
<td>28%</td>
<td>39%</td>
<td>33%</td>
</tr>
<tr>
<td>Collecting money for charity purposes</td>
<td>20%</td>
<td>35%</td>
<td>45%</td>
</tr>
</tbody>
</table>
PROTECTING CHILDREN
The protection of children and minors from sexual exploitation continues to be widely seen as a priority, just as it was during the 2011 study. 68% of guests believe that this is an important action that must be undertaken by hotels. Furthermore, among the major causes that hotels can promote through partnerships with NGOs, protecting children is clearly at the head of the list, with 27% support.

ACCORHOTELS AND THE PROTECTION OF CHILDREN
Through its WATCH programme – We Act Together for Children, which is currently active in 90% of its hotels, AccorHotels has been fighting against the sexual exploitation of minors for 15 years.

INVESTING IN LOCAL DEVELOPMENT
Among the other actions supported by guests, there are many measures to promote local development: supporting the local economy, promoting and protecting the local culture and heritage, supporting local communities, and partnerships with local NGOs.

EXPERIENCING LOCAL LIFE
What guests want
88% of guests agree that experiencing local life is one of the main reasons that they travel. Guests are therefore happy to have an experience of local life, but, somewhat paradoxically, they are not necessarily disappointed if the opportunity does not arise.

89% It was a real high point of my trip when the hotel where I was staying helped me to immerse myself in the local culture

71% I was disappointed when I wasn’t able to experience local life

Almost two out of three guests strongly agree that the thing that provides them with the best local experience when they travel is eating local food. Conversely, participating in activities with the local population (sports, art, cuisine) or purchasing artisanal products/souvenirs appealed to less than 30% of guests.
Hotels as facilitators
The hotel team has a key role to play in improving guests’ local experience. After the Internet, hotel reception is the second most common way for guests to obtain information about the local experiences that they can be a part of.

WHAT GIVES YOU THE BEST LOCAL EXPERIENCE WHEN YOU TRAVEL?

<table>
<thead>
<tr>
<th>STRONGLY AGREE</th>
<th>AGREE</th>
<th>DISAGREE + STRONGLY DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating local food</td>
<td>62%</td>
<td>35%</td>
</tr>
<tr>
<td>Learning about the history and culture of the place that I’m visiting</td>
<td>56%</td>
<td>40%</td>
</tr>
<tr>
<td>Discovering tourist sites (monuments, museums, natural landscapes, etc.)</td>
<td>55%</td>
<td>38%</td>
</tr>
<tr>
<td>Having the opportunity to frequent the same places as the locals</td>
<td>45%</td>
<td>48%</td>
</tr>
<tr>
<td>Meeting local people</td>
<td>40%</td>
<td>50%</td>
</tr>
<tr>
<td>Discovering the region through guided walking tours</td>
<td>39%</td>
<td>44%</td>
</tr>
<tr>
<td>Learning the basics of the local language</td>
<td>34%</td>
<td>48%</td>
</tr>
<tr>
<td>Purchasing artisanal products/souvenirs</td>
<td>29%</td>
<td>43%</td>
</tr>
<tr>
<td>Participating in activities with the local population (sports, art, cuisine)</td>
<td>24%</td>
<td>49%</td>
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</table>

WHEN YOU TRAVEL, WHAT ARE THE BEST WAYS TO EXPERIENCE LOCAL LIFE?

- 79% • Look on the Internet
- 68% • Ask at hotel reception
- 51% • Ask friends/people I know
- 49% • Consult tourist guides (Lonely Planet, Routard, etc.)
- 41% • Meeting local people
- 39% • I like to find my own way
- 35% • Using apps and social networks
- 24% • Asking for information at a local tourism agency
- 18% • Hiring a local guide who speaks my language

It is no surprise that the oldest guests (over 60) are more likely to visit hotel reception than younger travellers (70% compared to 60%). Guests from 18-29 years of age are more likely to look for information on the Internet (87%).
GUESTS ARE TAKING ACTION IN THEIR DAILY LIVES

What actions do you think would be the best proof that the hotel where you are staying is involved in social responsibility and sustainable development?

- Installing renewable energy equipment on the roof (solar panels, wind turbines, etc.) 67%
- Sorting waste in the hotel’s public spaces and in the rooms 57%
- Placing green plants around the hotel 33%
- Installing green walls or a green roof 28%
- Creating a vegetable garden 20%
- Employees giving "green advice" (for example advising guests to turn off the lights when leaving a room) 19%
- Hotel participation in charitable actions 17%

SORTING WASTE AND LIMITING ENERGY CONSUMPTION

Installing renewable energy equipment (solar panels, wind turbines) on the roof and sorting waste are actions that, depending on the guest, are the best proof that a hotel is involved in social responsibility and sustainable development. Furthermore, more than half of guests are very aware of the fact that hotels use energy-efficient equipment and recycling bins.

This reflects the fact that, limiting energy consumption and sorting waste are the second and third most common eco-responsible actions that are part of guests’ daily lives, behind limiting food waste (see page 9).

SURROUNDED BY PLANTS

Somewhat curiously, guests believe that installing green walls is better proof of a hotel’s involvement in promoting social responsibility and sustainable development than supporting charities.

After installing renewable energy equipment and sorting waste, guests are convinced that installing plants and green walls or a green roof are the kinds of actions that prove that a hotel is involved in social responsibility and sustainable development.
USING CLEAN TRANSPORTATION

In terms of transportation, guests are in favour of public transit, but also of the use of bikes and electric or hybrid vehicles (taxis, shuttles). 48% say that they are interested in the public transit discounts offered by their hotel.

REUSING A TOWEL

Just as they do not change their towels and sheets every day when they are at home, it has become normal for guests to reuse them for 2 to 3 days when staying at a hotel.

More than half of guests are in favour of reusing their towels, especially if some of the money saved in doing so is reinvested in planting trees for the benefit of the local community.

WOULD YOU BE WILLING TO USE THE SAME TOWELS OR SHEETS FOR 2 TO 3 DAYS?

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>65%</td>
</tr>
<tr>
<td>Business</td>
<td>64%</td>
</tr>
<tr>
<td>Leisure</td>
<td>57%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>41%</td>
</tr>
</tbody>
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PLANT FOR THE PLANET: AN EMBLEMATIC ACCORHOTELS PROGRAMME

The "Plant for the Planet" programme, launched in 2009, aims to incentivise guests who are staying more than one night in a hotel to reuse their towels. In return, AccorHotels makes a commitment to planting trees. This programme has many benefits for both the environment and the economy.

The usefulness of this programme, which has already financed the planting of 4.5 million trees in 25 countries throughout the world, is proved by the results presented here.
GUESTS ARE AWARE OF THE RANGE OF ECO-RESPONSIBLE PRODUCTS

GREEN PRODUCTS FOR ROOMS AND BATHROOMS
Half of guests are aware that their hotel uses green products. They are aware of the impact that these products have, not only on the environment, but also on their health. This corroborates another point revealed by the barometer study, namely that hotel guests pay attention to the health effects of the products that they consume (see page 11).

WOULD YOU SAY THAT YOU ARE AWARE OF THE FOLLOWING ACTIONS THAT MIGHT BE UNDERTAKEN BY A HOTEL?

- Using organic/green bathroom products: 51%
- Using preservative-free (no parabens, etc.) bathroom products: 49%
- Using environmentally friendly paint and carpets made from recycled materials that contain low concentrations of chemical products: 48%
- Using environmentally friendly towels and sheets: 47%

CLOSE-UP ON FOOD PRODUCTS
Only 6% of guests are not interested in healthy food. Guests are especially interested in locally sourced, organic, and seasonal produce.

Otherwise, more than one in three guests is interested in fair trade produce and produce harvested from the hotel garden.

Travellers therefore look for a hotel restaurant that grows its own vegetables, even if that is not a determining factor in their choice of hotel. Half of guests think that it is a good idea, but would not visit a hotel for this reason alone.

French guests are the most concerned with consuming LOCAL AND SEASONAL PRODUCE.

Younger guests are more likely than older guests to choose a restaurant based solely on the fact that it grows its own vegetables: 20% of guests under 29, compared to only 10% of guests over 60.

LET’S TALK ABOUT A BALANCED DIET. TELL US WHAT WOULD INTEREST YOU

- Using locally sourced produce: 73%
- Using seasonal produce (strawberries only in summer): 59%
- Using organic produce: 56%
- Using produce harvested from the hotel garden: 40%
- Using fair trade produce: 36%
- None of these, I’m not really interested in a balanced diet: 6%
Conclusion
Conclusion

GUESTS ARE TAKING ACTIVE STEPS IN FAVOUR OF SUSTAINABLE DEVELOPMENT

AN IMPORTANT, BUT NOT YET KEY ISSUE
Sustainable development is a now a widely understood concept that is seen as an important issue, and also as a driver of eco-responsible behaviours among hotel guests.

Nevertheless, a hotel’s degree of commitment to sustainable development is not always a deciding factor for guests when reserving a chamber.

THE POSSIBILITY OF REINFORCING ECO-RESPONSIBLE BEHAVIOURS
Women and younger guests are today the most interested in sustainable development and are the ones taking concrete steps to support it.

While these groups are in the minority among hotel guests, they nevertheless represent the future of the hotel industry. The young guests of today are the majority guests of tomorrow. Women represent a constantly growing proportion of business travellers, which makes them a promising target demographic for hotel operators.

GUESTS ARE READY TO PAY MORE FOR MORE ECO-RESPONSIBLE HOTELS
Even if guests are not ready to sacrifice comfort or location to stay in a more eco-responsible hotel, they are ready to pay more for it.

Guests are largely aware of the need for action in order to protect future generations and they understand that implementing social and environmental measures has a cost, a cost that they are ready to take on.

GUESTS ARE GETTING INVOLVED VOLUNTARILY
Guests are also motivated to join hotel operators in playing an active role. Nearly 2 out of 3 guests are ready to receive their bill by e-mail rather than on paper and to sort their waste in both their rooms and in common areas. These trends are seen consistently across all 7 of the countries studied.

Even if guests are ready to undertake actions that require a low level of commitment, they are also likely to continue their daily eco-responsible behaviours when they are at a hotel.
GUESTS ARE CONCERNED WITH LOCAL PRODUCTS ABOVE ALL
Among the many areas affected by sustainable development, guests are concerned above all with the hotel’s connection to the local community. Guests give great importance to the creation of local jobs, the support of local populations, and to the hotel’s role in enriching guests’ stay with local experiences. Hotels should be fully connected to their environment and must help guests to establish such connections as well.

This barometer study has shown that local responsibility is central to guests’ perception of hotels’ commitment to sustainable development.

SUSTAINABLE HOTELS THAT MEET GUESTS’ EXPECTATIONS

THE BAROMETER STUDY’S 3 CONCLUSIONS

1. MEASURE CHANGING BEHAVIOURS
2. IDENTIFY EXPECTATIONS AND LEVELS OF AWARENESS
3. PROPOSE RELEVANT ECO-RESPONSIBLE COMMITMENTS

Trends identified since 2011
By carrying out a second study, five years after the first one, AccorHotels hoped to identify changes in guest attitudes and behaviours as relate to sustainable development.

In a general sense, this new barometer study confirms that there is an overall collective consciousness around sustainable development, a worldwide consciousness that varies according to local realities. There have been no major changes since the 2011 report, especially in relation to the importance of a hotel’s commitment to eco-responsibility when the time comes for guests to make a reservation.
A higher level of expectation
After confirming the general awareness of sustainable development, this new study went farther, trying to describe the concrete behaviours undertaken by hotel guests.

The barometer study reveals that the various actions that guests have made a part of their daily lives and it shows that they voluntarily continue these actions when they stay in a hotel. Guests therefore have high expectations of hotel operators, wanting them to implement socially and environmentally responsible measures.

The need for concrete and customised measures
The hotel industry must therefore rise to meet the challenges that it faces today. It is therefore necessary to provide effective solutions that respond to current issues and take into account the matters that are important to guests.

Hotels need to adapt to the habits and levels of awareness of their guests so that they can work together to protect people and the environment.

3 MAJOR PROBLEMS THAT CAN BE TRANSFORMED INTO CONCRETE STEPS FORWARD
There are three themes that stand out as priorities for guests. These areas can be the basis for a sector-wide commitment to a sustainable hotel industry.

Waste
Guests have made the fight against food waste a part of their daily lives. The same is true of waste sorting. They are ready to continue these behaviours at a hotel if the hotel has made adequate solutions, such as recycling bins, available.

Energy
Guests are in favour of purchasing energy efficient appliances. They are keenly aware of hotels’ use of renewable energy and of hardware that reduces energy consumption.

Plants and trees
For 1 out of 3 guests, the presence of plants in hotels is the best proof that a hotel is committed to sustainable development. Guests are ready to make greater efforts, such as reusing their towels, if the money saved in doing so is invested in planting trees.

PLANET 21 2016–2020, DRAWING ON THE CONCLUSIONS OF THIS BAROMETER STUDY
AccorHotels has integrated these lessons into its new commitments, thereby placing guests’ expectations at the heart of its sustainable development strategy.

With the Planet 21 2016-2020 programme, AccorHotels has made ambitious commitments to reaffirm the importance of connecting hotels with their local communities, of helping guests to be more involved, of promoting controlled energy consumption, and of waste management, among other things.
WHAT IS PLANET 21 RESEARCH?
A PLATFORM ACCESSIBLE TO ALL, PLANET 21 RESEARCH IS A SHARED KNOWLEDGE BASE ON SUSTAINABILITY IN THE HOTEL INDUSTRY. IT IS BOTH FREE OF CHARGE AND OPEN TO ANYONE.

AccorHotels regularly adds to the platform with the results of new polls, research or case studies on best practice to help the entire hotel industry incorporate sustainability more effectively.

Furthermore, AccorHotels makes its methodologies available, to enable its research to be replicated or refreshed by other members of the hotel industry. Only one condition is attached to use of the methodologies, namely the findings obtained must be distributed free of charge, as AccorHotels itself does.

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