



ACCOR HOTELS

Feel Welcome

PLANET 21, ACTING FOR POSITIVE HOSPITALITY

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.

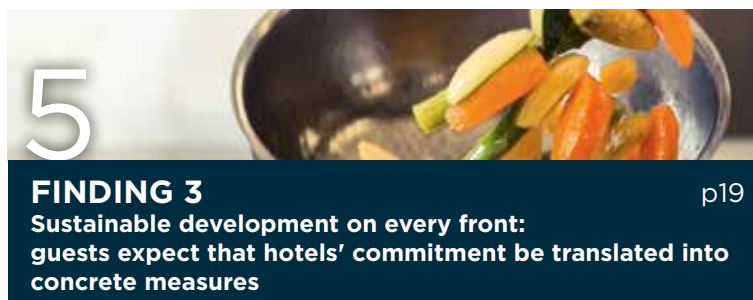
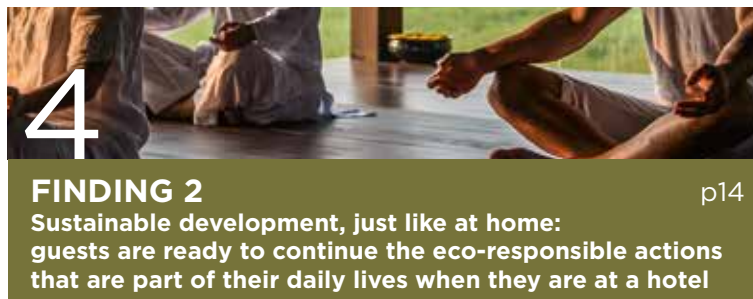
More than 190,000 women and men take care of thousands of guests in the 3,900 AccorHotels brand hotels spread throughout more than 90 countries.

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.



Contents





1

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:



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.





2 Methodology





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), and Asian (Indonesia)

Varied levels of economic development

mature countries (Germany, Australia, United States, France, United Kingdom) and emerging ones (Brazil, Indonesia)

Unequal engagements with environmental realities

countries that are already feeling the effects of climate change, such as Australia and Indonesia

7,000
hotel guests
in
7
countries

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.



3 Finding I



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.

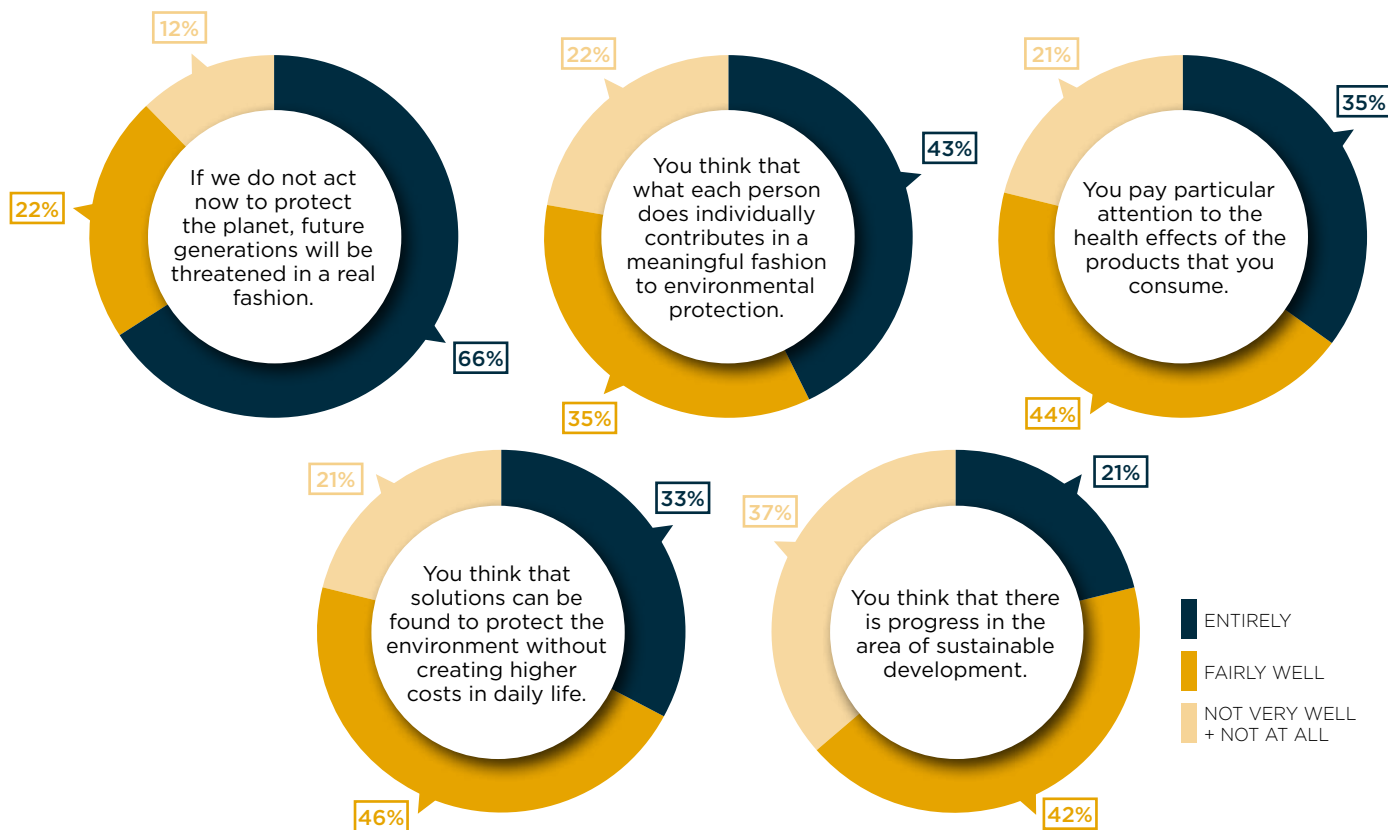
A RANGE OF ACTIONS THAT HAVE BECOME A PART OF DAILY LIFE

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.

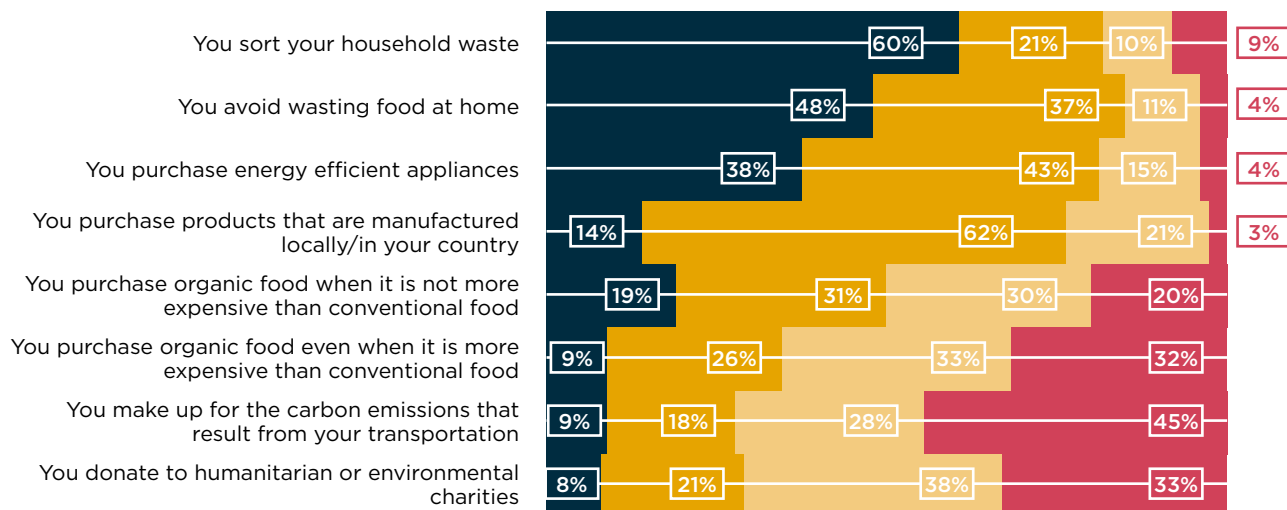


FOR EACH ONE OF THE FOLLOWING SENTENCES, PLEASE INDICATE IT REFLECTS YOUR PERSONAL OPINION ENTIRELY, FAIRLY WELL, NOT VERY WELL, OR NOT AT ALL.



HERE ARE SOME BEHAVIOURS OR OPINIONS THAT SOME PEOPLE MIGHT EXHIBIT/HAVE. FOR EACH ONE, WOULD YOU SAY THAT YOU SHARE THEM ALWAYS, OFTEN, SOMETIMES, RARELY, OR NEVER?

ALWAYS (Dark Blue) OFTEN (Orange) SOMETIMES (Light Orange) RARELY + NEVER (Pink)



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 women 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 led 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



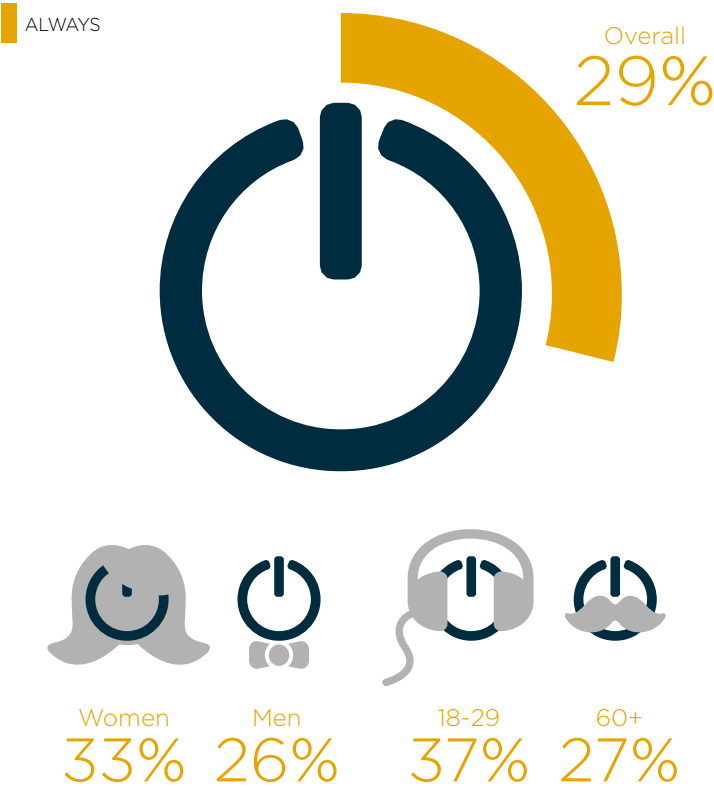


NOTABLE DIFFERENCES BETWEEN DIFFERENT GUEST PROFILES

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.



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.



DIFFERENCES LINKED TO COUNTRY OF ORIGIN



GERMANY

the most optimistic and diligent when it comes to sustainable development, but among the least aware of the health impacts of the products they consume

74%

sort their waste compared to an average of 60%

22%

pay particular attention to the health effects of the products that they consume, compared to an average of 35%



BRAZIL

very worried about food waste and purchasing energy efficient appliances, but more likely to never donate to humanitarian and environmental charities

62%

always avoid wasting food at home, compared to an average of 48%

18%

never donate to humanitarian and environmental charities, compared to an average of 13%



FRANCE

very aware of the health effects of the products they consume or use, but the most likely to never turn off their electric appliances rather than leaving them on standby

48%

pay particular attention to the health effects of the products that they consume, compared to an average of 35%

7%

never turn off their electric appliances rather than leaving them on standby compared to an average of 5%



UNITED STATES

the least concerned about limiting food waste and the most generous in donating to environmental or humanitarian charities

36%

donate to environmental or humanitarian charities always or often, compared to an average of 29%

35%

always avoid wasting food at home, compared to an average of 48%



UNITED KINGDOM

not very concerned with purchasing local products, but very concerned with sorting waste

73%

sort their waste compared to an average of 60%

6%

always purchase products that are manufactured locally/in their country, compared to an average of 14%



AUSTRALIA

the least likely to purchase organic food, but more likely than the average to purchase locally manufactured products

19%

always purchase products that are manufactured locally/in their country, compared to an average of 14%

11%

always purchase organic food when it is not more expensive than conventional food, compared to an average of 19%



INDONESIA

are more likely to take sustainable development into account when they chose a hotel, but the least likely to reuse their towel over several days

37%

always take sustainable development into account when choosing a hotel, compared to an average of 13%

41%

believe that it is not a problem for them to use the same towels and sheets for two or three days, compared to an average of 57%

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.



A woman with her hair in a bun is sitting in a meditative lotus position on a dark wooden deck. She is wearing a light-colored, short-sleeved button-down shirt and light-colored pants. Her hands are resting on her knees in a mudra. To her left, a small black bowl filled with yellow flowers sits on the deck. The background is a vast, hazy tropical landscape with lush green trees, palm trees, and rolling hills under a soft, warm sky. A vertical wooden post is visible to the left of the woman.

4 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.

36%

**OF INDONESIAN
guests**

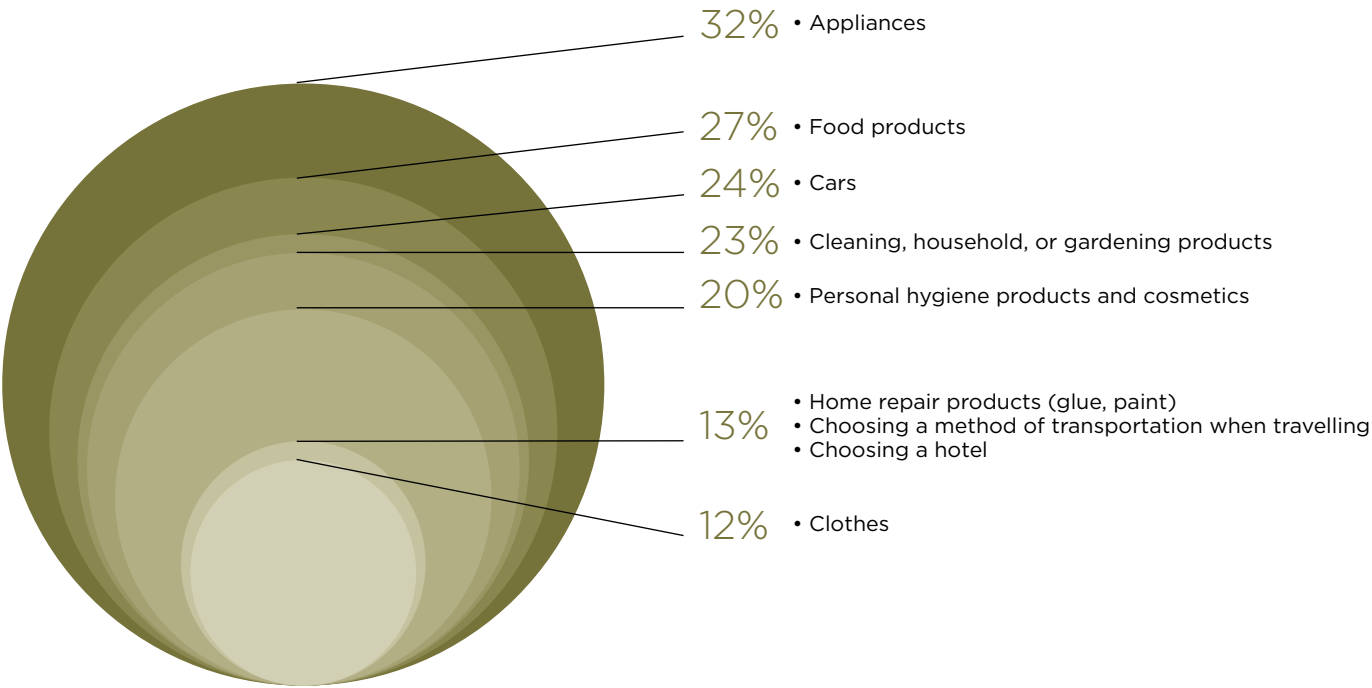
say that they always take sustainable development into account when choosing a hotel room, compared to

an average of

13%

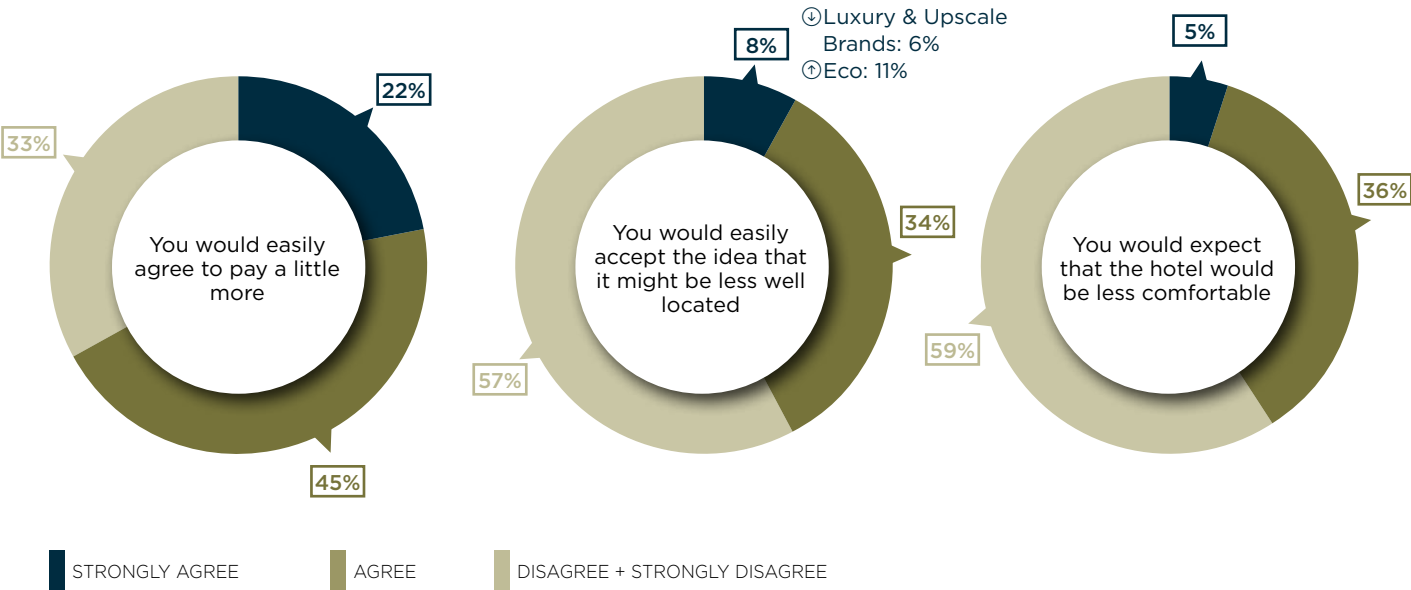


WHEN YOU PURCHASE THE FOLLOWING PRODUCTS OR SERVICES, WOULD YOU SAY THAT SUSTAINABLE DEVELOPMENT IS:



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.):



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.

Upscale and luxury hotel guests ARE MORE DEMANDING WHEN IT COMES TO HOTEL LOCATION THAN ECONOMIC HOTEL GUESTS ARE



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

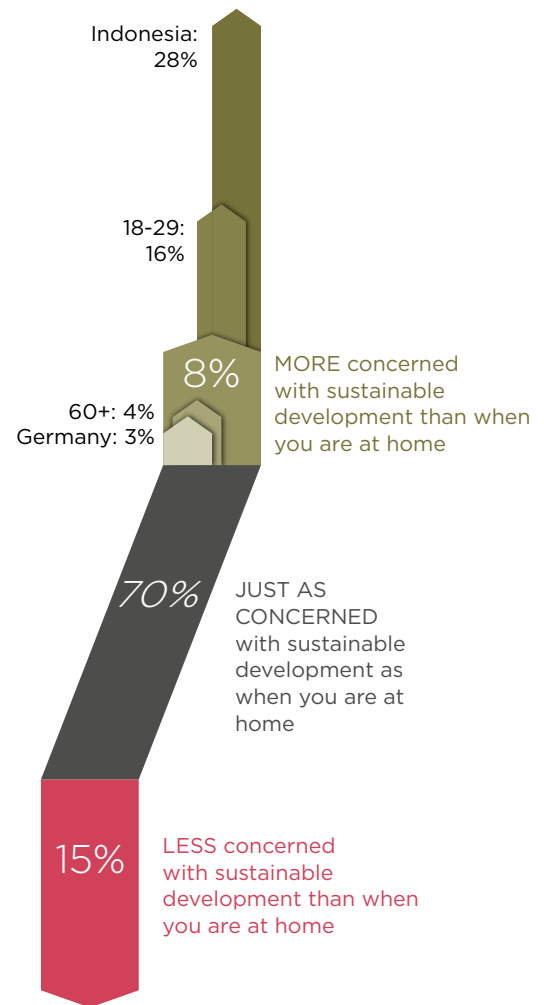
Guests who consider sustainable development when they are choosing a hotel tend to act more eco-responsibly when at a hotel, but not much more than those who do not think that sustainable development is important when making a purchase. Young people, from 18-29 years old, are much more likely think about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

BEING ABLE TO COUNT ON SUFFICIENT FACILITIES

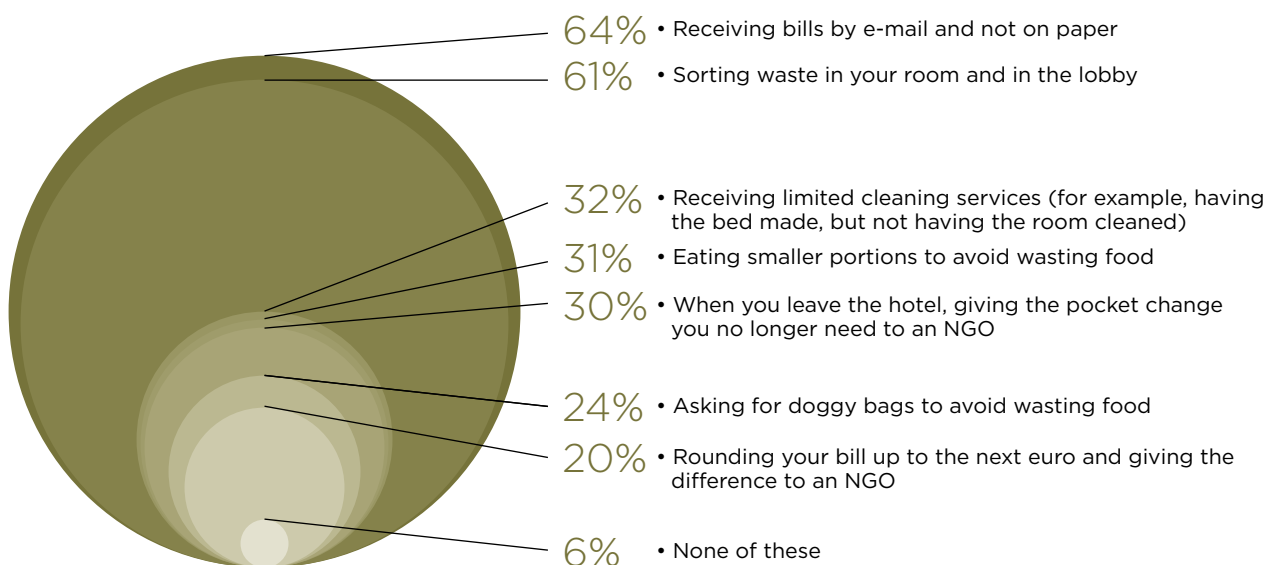
Even away from home, guests retain the same level of commitment. They want to continue their concrete daily actions, even when they are travelling.

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:



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





5 Finding 3



Finding 3

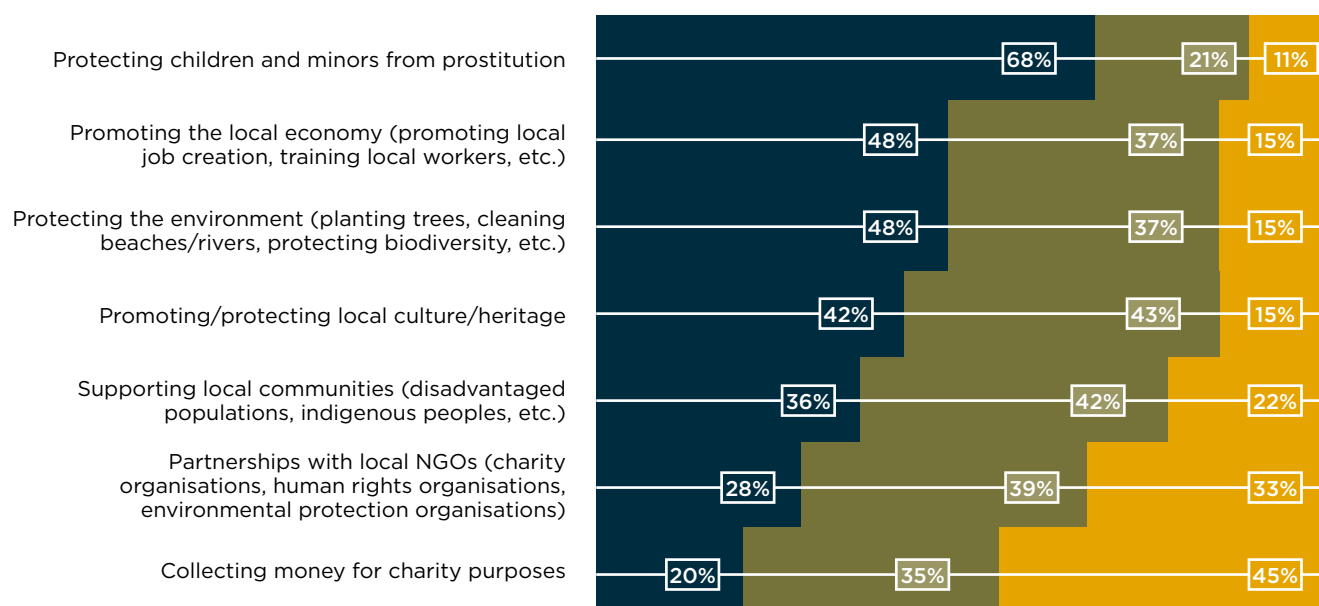
SUSTAINABLE DEVELOPMENT ON EVERY FRONT: GUESTS EXPECT THAT HOTELS' COMMITMENT BE TRANSLATED INTO CONCRETE MEASURES

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



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 local 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.

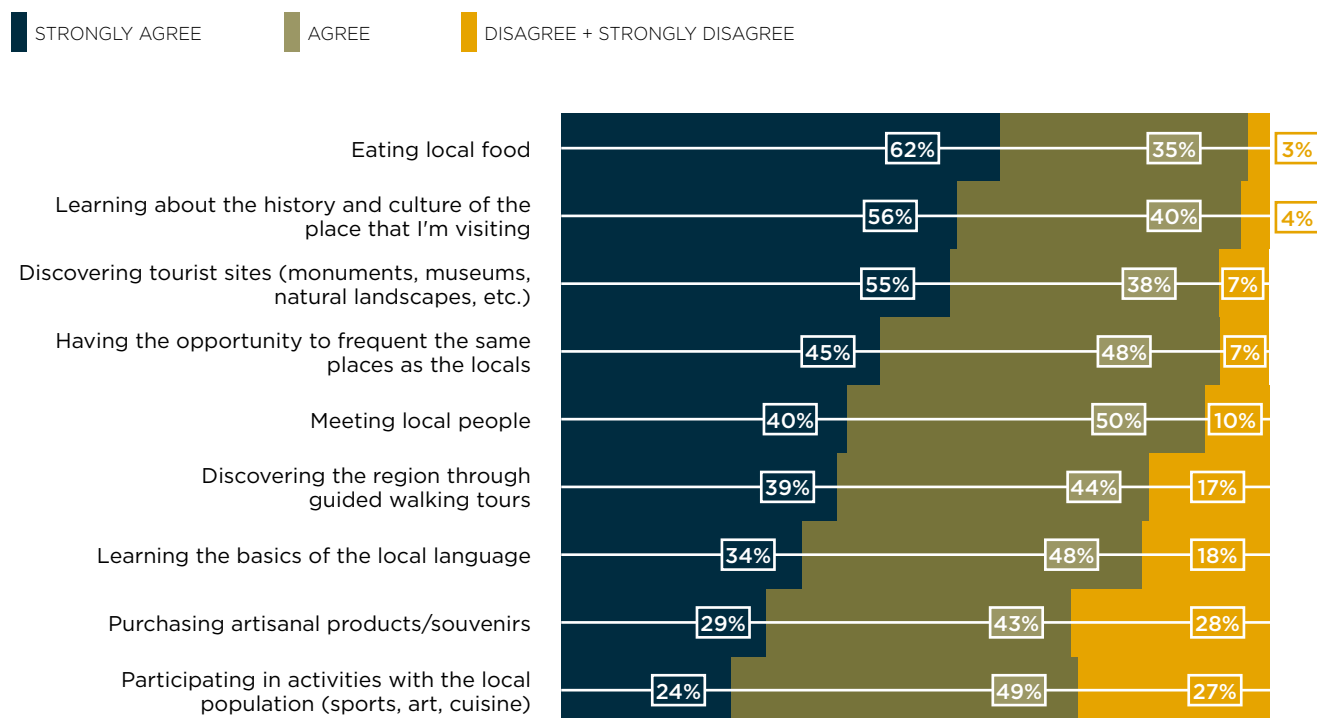
89% | It was a real high point of my trip when the hotel where I was staying helped me to immerse myself in the local culture

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.



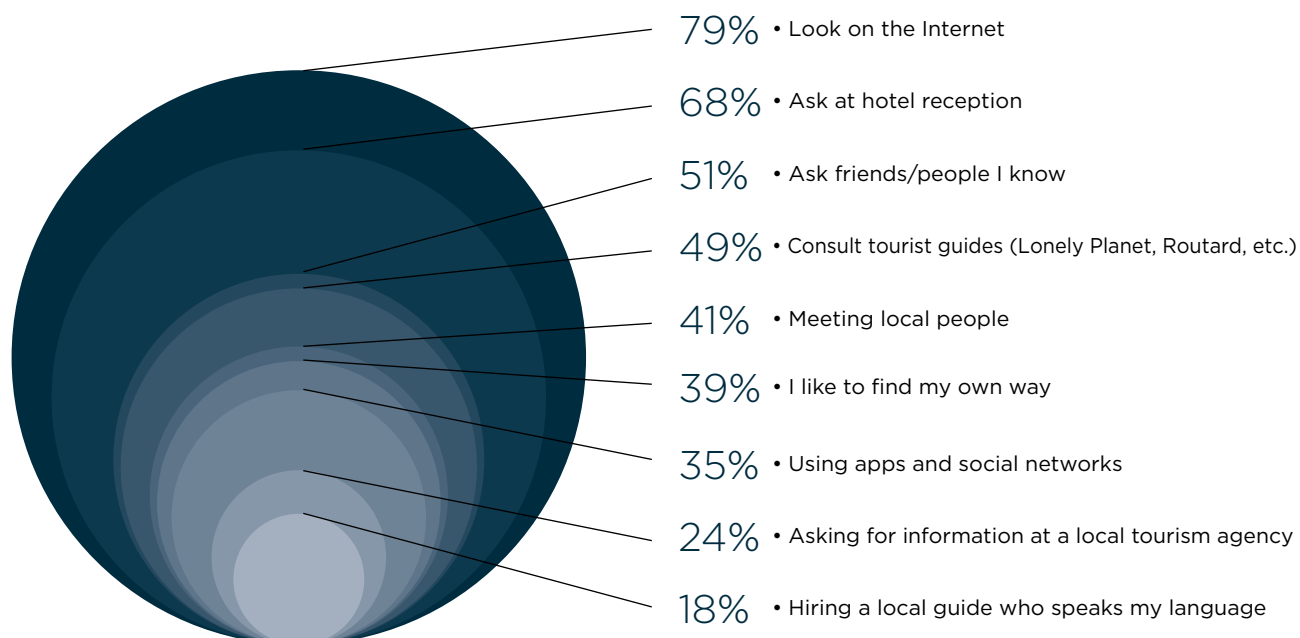
WHAT GIVES YOU THE BEST LOCAL EXPERIENCE WHEN YOU TRAVEL?



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.

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

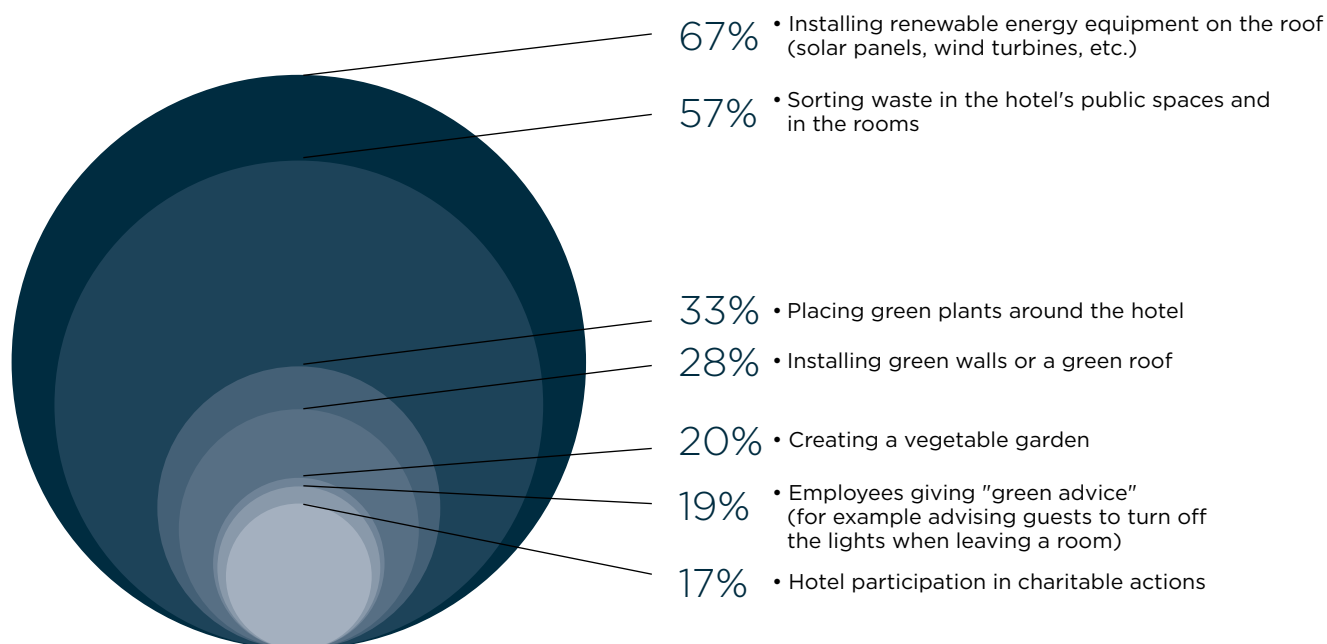


It is no surprise that the oldest guests (over 60) are more likely to visit hotel reception than younger travellers (70% compared to 60%). Guests from 18-29 years of age are more likely to look for information on the Internet (87%).



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?



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).

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

61% | Using energy-efficient equipment (lighting, AC, TV, minibar, etc.)

59% | Using recycling bins

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

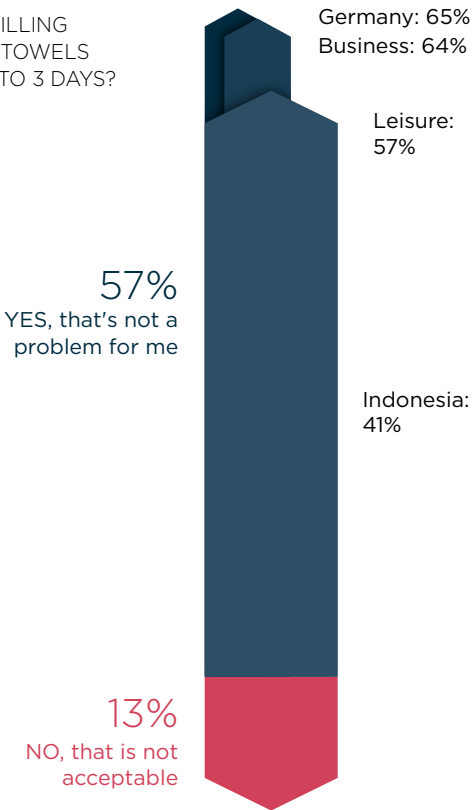
In terms of transportation, guests are in favour of public transit, but also of the use of bikes and electric or hybrid vehicles (taxis, shuttles). 48% say that they are interested in the public transit discounts offered by their hotel.

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?



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.

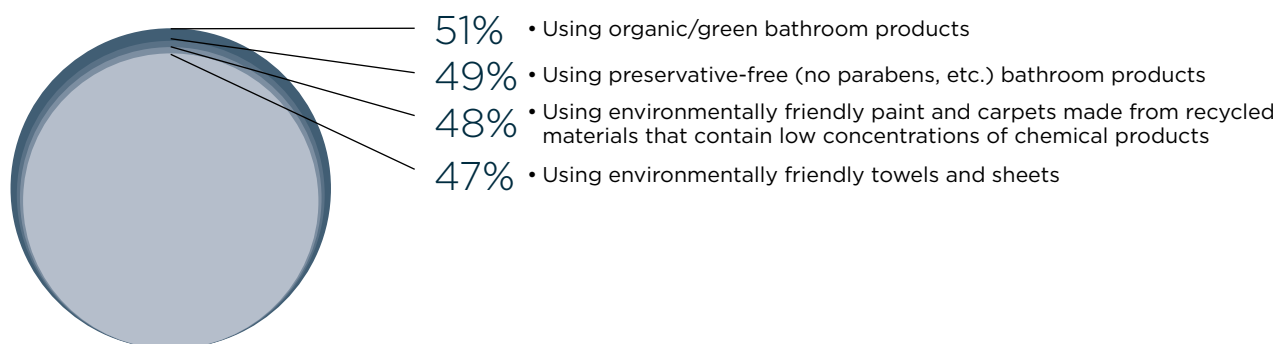


GUESTS ARE AWARE OF THE RANGE OF ECO-RESPONSIBLE PRODUCTS

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?



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.

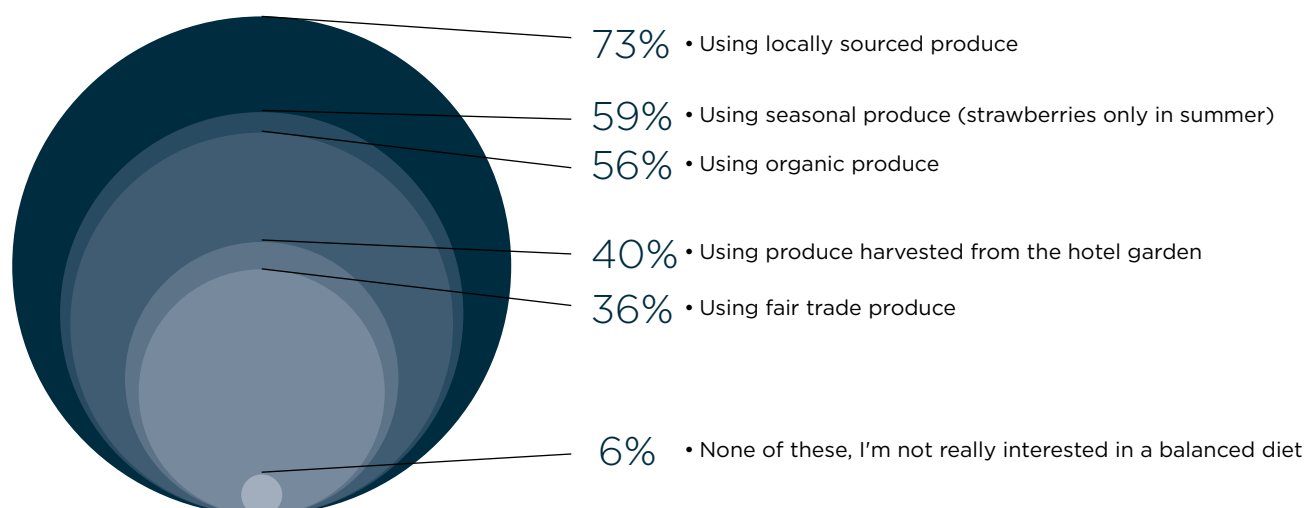
Travellers therefore look for a hotel restaurant that grows its own vegetables, even if that is not a determining factor in their choice of hotel. Half of guests think that it is a good idea, but would not visit a hotel for this reason alone.

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





6 Conclusion



Conclusion

GUESTS ARE TAKING ACTIVE STEPS IN FAVOUR OF SUSTAINABLE DEVELOPMENT

AN IMPORTANT, BUT NOT YET KEY ISSUE

Sustainable development is 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.

64%
of guests

are ready to receive
their bills by e-mail
and not on paper

61%

are ready to sort
waste in their room
and in the lobby





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.



NOTES



Planet 21 Research

**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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