

Press Release

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Accor creates Earth Guest Research, an open knowledge platform on sustainable development for the hotel industry

The first publication made available to industry players is a world-first global survey of hotel guests' expectations regarding sustainable development.

Accor is announcing the launch of *Earth Guest Research*, a platform for sharing knowledge on social and environmental issues relating to the hotel industry. The platform aims to contribute to progress in the tourism industry by making sustainable development surveys and methodologies available to all industry operators, as well as to the general public.

To identify effective improvement drivers and win customer support, the Group decided to start by finding out exactly **what hotel guests' concerns and expectations are with regard to sustainable development**. The first *Earth Guest Research* publication is therefore dedicated to this topic.

"With 4,200 hotels worldwide and our pioneering experience in sustainable development, our role is to drive change and lead the tourism industry in this field," says Accor Chairman and Chief Executive Officer, Denis Hennequin. "I strongly believe that sharing our knowledge will enable us to advance, and that we need to leverage sustainable development concerns to develop new, more sustainable products and services that will eventually lead to a whole new approach to the hotel experience."

Methodology

The survey of hotel guests' sustainable development-related expectations was carried out by French market research institute IFOP **in six countries** — Australia, Brazil, China, France, Germany and the United Kingdom — **from August 9-30, 2010**. Representative of hotel users in each country, the sample groups comprised nearly **7,000 respondents** who had spent at least one night in a hotel in the previous 12 months, including a cross-section of hotel types (chain, independent, etc.) and segments (budget, economy, midscale, upscale and luxury). The idea is to extend the tracking study to other countries and renew it on a regular basis to identify any changes in consumer expectations.

The survey is available as of today from the www.accor.com website, where all *Earth Guest Research* publications will be posted. The survey methodology is also available to industry operators provided that they agree to freely share their own survey results.

Key Findings

- **A typical profile has emerged.** Young, male business guests who use economy hotels seem to be the most concerned about sustainable development.
- **A global consensus on water, energy and waste.** One slight difference: Brazilian guests are particularly concerned about local development and Chinese guests about health and well-being.
- **NGOs and international organizations rank last on the responsibility scale.** One in three guests believes that sustainable development is first and foremost the responsibility of individual citizens.
- **A constraint turned into a desirable experience.** Seven out of ten guests said they would select a responsible hotel even if it was less well-situated and slightly more expensive.

Earth Guest Research's first hotel guest survey

- **Certain guest profiles are more concerned about sustainable development than others.**

Contrary to popular belief, sustainable development seems to be of more concern to **men** (82%) than to women (72%). This finding is closely related to another, as business customers — the majority of whom are still men — were found to be more concerned about the topic than leisure customers. The understanding of the concept also varies by hotel segment. **Economy hotel** guests seem more sensitive to sustainable development issues. However, this may be due to the lower average age of budget hotel users, who are generally quite young.

Nearly eight out of ten respondents claimed to know and understand the concept of sustainable development, which is seen as a day-to-day reality regardless of cultural and socio-economic differences, the purpose of the stay and the type of hotel selected. It must, however, be noted that it is politically incorrect in today's society to say that you are insensitive to this issue.

- **A global consensus on water, energy and waste.**

In response to an open-ended question, optimizing water and energy resources and reducing waste were by far the **main concerns worldwide**. In response to a closed-ended question, guests identified the fight against child sex tourism as a key priority for the hotel industry. This indicates that guests are particularly attentive to negative externalities related to a hotel's direct activity.

When asked about their sustainable development-related expectations, Chinese hotel guests ranked **health and well-being** high on their list, while Brazilian guests seem more concerned with fostering **local economic development**, a major issue in a country that is trying hard to reduce inequality.

- **NGOs and international organizations rank last on the responsibility scale.**

In a noteworthy change, survey respondents placed NGOs and international organizations last on the scale of responsibility for sustainable development issues. This observation seems to indicate that the time for enhancing awareness and encouraging action has passed and must now give way to more practical measures that enable customers to make a direct contribution.

Cultural differences seem to influence the order in which respondents place those they see as primarily responsible for sustainable development. **The government and individual citizens topped the list in France, Germany and Brazil**. In these countries, respondents widely insisted on their own role in the process, with results above 70% overall and above 80% in Brazil.

In Australia and the United Kingdom, on the other hand, hotel guests attribute **almost equal responsibility to business and government**, and only one out of two respondents believes that individual citizens are responsible for sustainable development. In China, the top spot went to **government, followed by private enterprise**.

- **A constraint turned into a desirable experience.**

Fifty-one percent of the survey respondents said they wanted their room to be at the right temperature as soon as they arrived. Paradoxically, 93% said they were in favor of adjusting the air-conditioning themselves, even if it meant waiting several minutes for the desired temperature to be reached. It seems that guests are willing to sacrifice some of their own comfort in favor of the environment, as long as they have a choice and are allowed to play an active role in the process.

Guests also say that they are increasingly considering social and environmental responsibility criteria when selecting a hotel, even if it means staying in a less practical location or paying slightly more. Lastly, sustainable development is no longer seen as a sacrifice or equated with a lower-quality offering; **66% of respondents do not expect comfort to suffer** in a hotel engaged in a sustainable development process.

“While some of these findings need to be interpreted with caution, they nonetheless reflect a new awareness of sustainable development issues and, more importantly, the emergence of new behaviors,” comments Sophie Flak, Executive Vice President, Organization and Sustainable Development. “As a leading hotel operator, it's our job to deploy innovative solutions that minimize the impact of each stay no matter how responsibly our guests behave, while offering them the opportunity to play an active role if they wish. We believe that sustainable development will drive continuous improvement across the board by creating offers and practices that are efficient, safe and environmentally friendly. Our goal is reinvent hotels... sustainably.”

To contribute to the development of the *Earth Guest Research* open knowledge platform, Accor will soon share its **environmental footprint** with its peers. A first in the hotel industry, the assessment included all of Accor's 4,200 hotels worldwide and confirmed the Group's commitment to establishing reliable, demanding systems of comparison to drive progress across the industry.

After taking into account the lessons learned from its hotel guest tracking study and environmental footprint assessment, Accor will unveil its new sustainable development strategy in the fall.

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. Accor's broad portfolio of hotel brands – Sofitel, Pullman, MGallery, Novotel, Suite Novotel, Mercure, Adagio, ibis, all seasons, Etap Hotel, Formule 1, hotelF1 and Motel 6 – and its related activities, Thalassa sea & spa and Lenôtre, provide an extensive offer from luxury to budget. With 145,000 employees worldwide, the Group offers its clients and partners nearly 45 years of know-how and expertise.

An electronic press kit is available in the sustainable development section of the www.accor.com website.

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