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Destination Sustainability

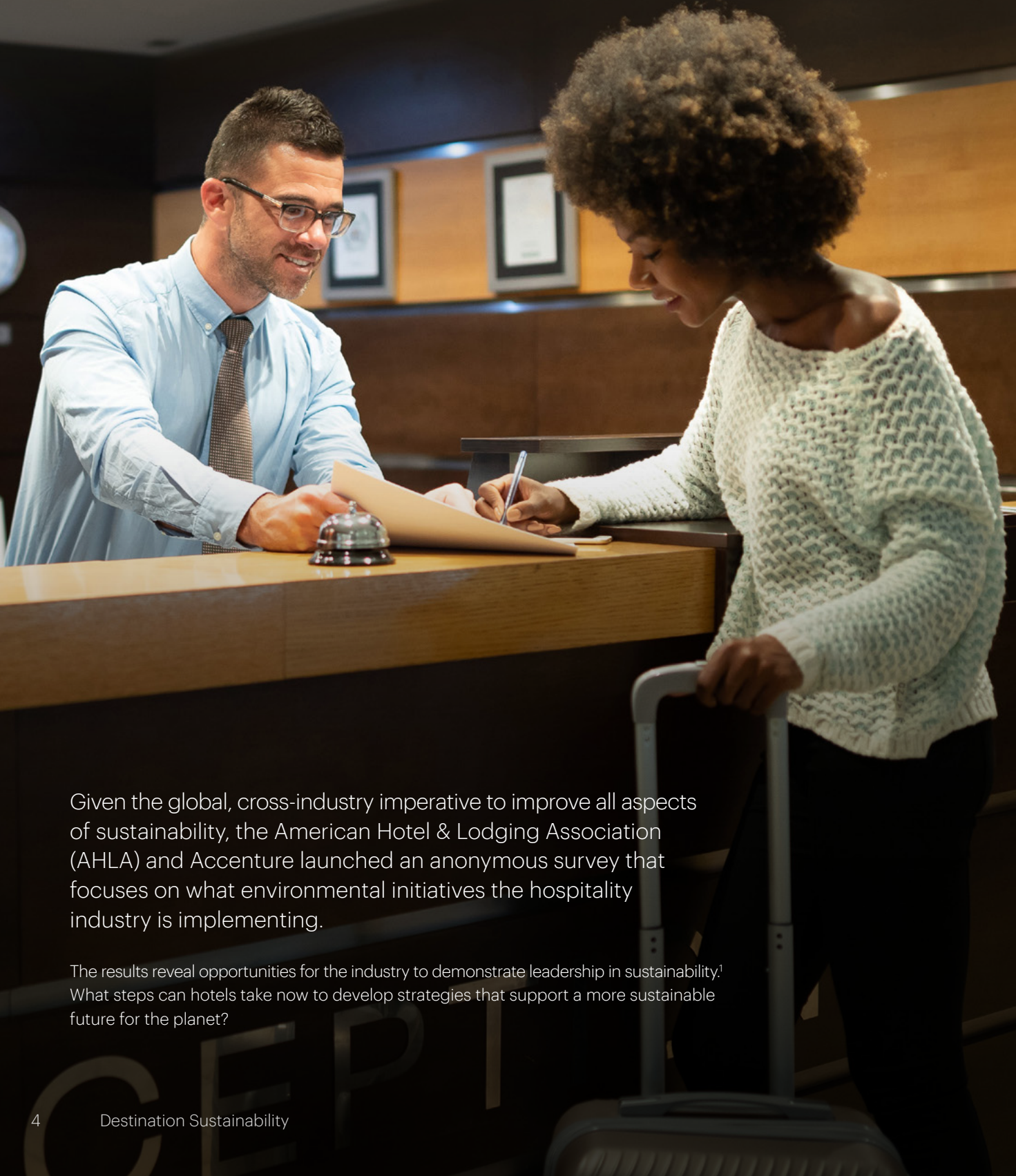
The American Hotel & Lodging Association Sustainability Survey in collaboration with Accenture



Content

Hotels have a critical role in creating a more sustainable future. How well are they doing today?	4
We are all guests on this planet	5
A unique environment for sustainability	5
Awareness is one thing, action is another	8
Key survey findings	9
Pressure	9
Competitiveness	10
Strategy	11
Voices from the survey	12
What does good look like in the next five years?	14
Every destination has a starting point	16
Turning awareness into action	18
1. Assess current state	19
2. Define ambition and rally team	19
3. Set up reporting capabilities	20
4. Pilot, measure and refine	20
5. Scale and support the change	21
Start now to reach the destination	22
Authors & Acknowledgements	24
References	26

Hotels have a valued role in creating a more sustainable future. What are hotels doing today?



Given the global, cross-industry imperative to improve all aspects of sustainability, the American Hotel & Lodging Association (AHLA) and Accenture launched an anonymous survey that focuses on what environmental initiatives the hospitality industry is implementing.

The results reveal opportunities for the industry to demonstrate leadership in sustainability!¹ What steps can hotels take now to develop strategies that support a more sustainable future for the planet?

We are all guests on this planet

Commitments like the Paris Agreement and UN Sustainable Development Goals (UN SDGs) are an appeal to businesses and governments to take the lead in addressing climate change urgently and strategically. And many industries are making progress. Almost all have seen the proportion of companies setting net zero targets rise over the past year.

More and more, the business community is embracing the connection between business value and sustainable impact. Ninety-nine percent of CEOs of companies with more than \$1 billion in annual revenues think sustainability will be key to their company's future success.³ Leaders recognize that sustainable practices can improve competitiveness, and investors are grounding decisions in sustainability and increasingly allocating capital toward sustainability initiatives.

Even amid a difficult economic environment, Accenture research shows that net zero remains firmly on the corporate agenda. In June 2022,

84% of companies were saying that they plan to increase investments in sustainability initiatives by the end of the year.⁴ What's good for the planet is also good for business. And it can help organizations move from focusing purely on financial value to sustainable profitable growth.

In 2022, 55% of Travel companies set net zero targets, in comparison to 30% the previous year.²

A unique environment for sustainability

Every industry has a unique role in protecting the planet's sustainable future. Hospitality is no exception. The Sustainable Hospitality Alliance reports that, based on 2010 levels, to reach Paris Agreement targets, hotels must lower per-room carbon emissions by at least 66% by 2030, and 90% by 2050.⁵ With the annual average number of overnight stays in US hotels expected to grow by 20% between 2022 and 2026⁶, much needs to be done now to avoid a wider gap between sustainability awareness and action. Can the industry really afford not to take meaningful action now?

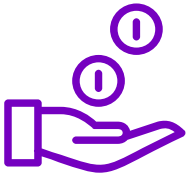
Recent Accenture research shows that companies are facing a permanent state of change at a pace never seen before. Rapidly shifting consumer preferences and climate change are among the key drivers of this change.

As hotels continue to evolve how they do business amid so much change, there is an imperative for a strategy that Accenture calls Total Enterprise Reinvention.⁷ Companies following this strategy (Reinventors) reinvent every part of their companies over time. Their reinvention centers around a digital core and new ways of working

that establish a culture and capability for continuous reinvention. Doing so, they can set a new performance frontier for themselves and their industry.

Accenture believes that we're at the early phases of this wave of change, and that the next three years will be characterized by Total Enterprise Reinvention – It's an ideal time for hotels to make sustainability part of their continuous reinvention, embedding it into everything they do to deliver long-term, sustainable value for stakeholders beyond financials.

In addition to region-specific regulatory pressures, such as upcoming U.S. Securities and Exchange Commission sustainability reporting requirements, there are several fundamentals shaping the dynamics of sustainability mindsets and initiatives that are unique to hospitality today—and that will shape hotels' ability to make sustainability a strategic priority:



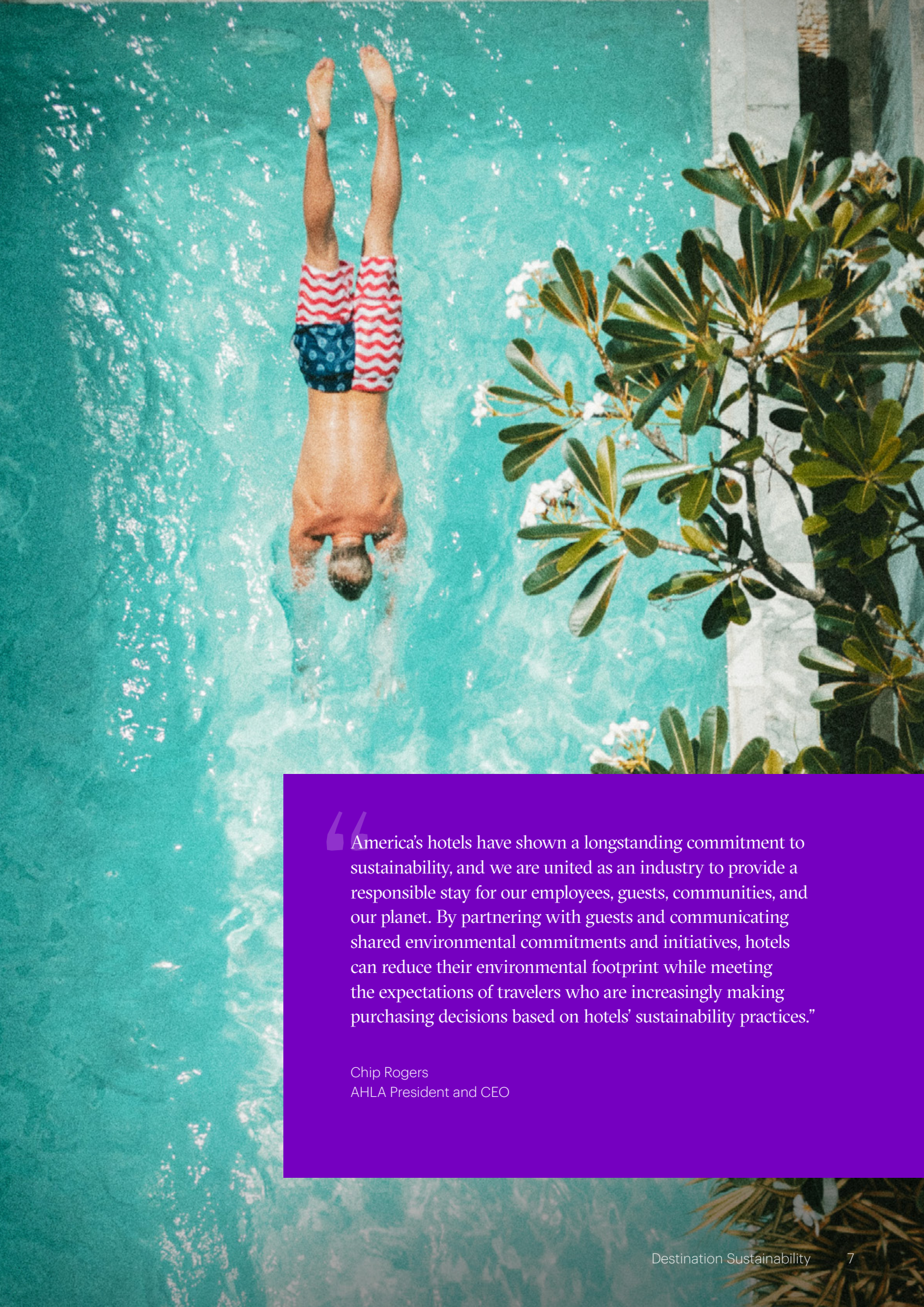
Resilience and financial opportunity. While hotels' resilience continues to be tested, the positive news is that there are financial benefits that come from improving environmental sustainability. Hoteliers don't have to choose between conserving money and conserving the environment. Hotels can make sustainable investments that are financially prudent and can deliver a strong return on investment (ROI) and cost savings over time. A joint study between IHG Hotels & Resorts and Schneider Electric found a 38% ROI from decarbonizing a hotel after five years.⁸ It's been reported that even small changes for sustainability can yield up to 40% savings in utility costs.⁹ Results like these challenge traditional views on cost-benefit trade-offs associated with investing in sustainability.



Guest expectations. More and more, consumers are making purchasing decisions based on hotels' sustainability practices. They want to do business with companies that share their values and expectations around sustainability. Over the next year, 78% of global travelers plan to stay at a sustainable property at least one time.¹⁰ This is getting easier to do as online travel agencies (OTAs) add eco-certification functionality to search tools. Sustainability matters so much to travelers that some—83% of 25- to 34-year-olds—suggest that they will pay more for it.¹¹ It's not just leisure travelers who are pushing for sustainable accommodations. It's also a priority for business travelers, a key segment for hotels. Often, companies are requiring employees who travel for work to book with brands that have certified sustainability standards.¹²



Resource consumption. The very nature of hotels and the services and experiences they provide creates inherent sustainability challenges. The size of the hospitality industry real estate footprint alone is an obstacle. Hotels are energy intensive¹³ and significant consumers of water and single-use plastics. In fact, a single hotel can use 1,500 liters of water per room every day.¹⁴ The challenges that hotels face in assessing and prioritizing Scope 3 emissions (such as outside laundry services and food and beverage supply) make it difficult to get a true picture of resource consumption. The industry's varied ownership models and infrastructure dependency are also complicating factors.¹⁵



“America’s hotels have shown a longstanding commitment to sustainability, and we are united as an industry to provide a responsible stay for our employees, guests, communities, and our planet. By partnering with guests and communicating shared environmental commitments and initiatives, hotels can reduce their environmental footprint while meeting the expectations of travelers who are increasingly making purchasing decisions based on hotels’ sustainability practices.”

Chip Rogers
AHLA President and CEO

Awareness is one thing Action is another

Given this complex environment, AHLA and Accenture surveyed hotel owners across the country to understand how the hotel community in the United States is thinking about—and acting on—environmental sustainability issues.¹⁶

The survey responses indicate that while there is heightened awareness around the sustainability imperative, largely due to increased focus on the issue from internal and external stakeholders, there are many opportunities for hoteliers to bolster their sustainability strategies.

Key survey findings

Pressure

Hotel owners are feeling more pressure than ever to focus on sustainability.

More than 90% of respondents acknowledge that there has been more pressure over the past few years to reduce hotels' impact on the environment (Figure 1). The increased pressure is coming from both internal and external constituencies, including customers, employees, outside investors and properties' brand organizations. Not surprisingly, given what we know of traveler expectations, hotel owners say that consumers exert the most pressure, followed by outside investors and brand organizations (Figure 2).

Figure 1: Hotel owners feel more pressure to focus on sustainability than they did in the past

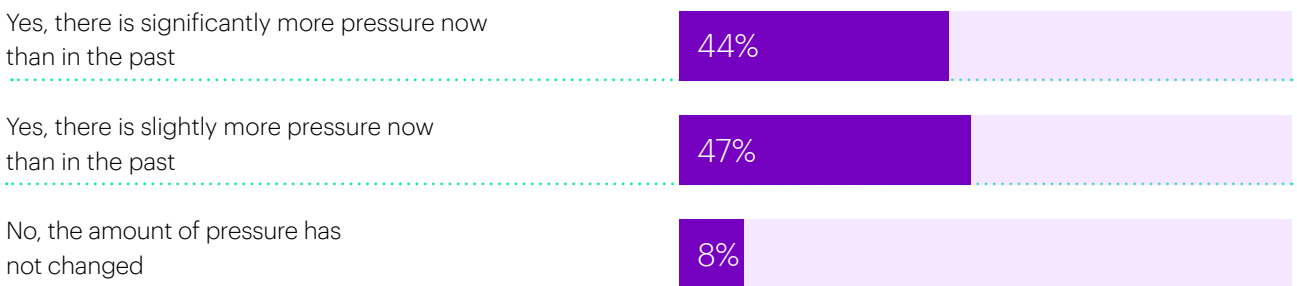
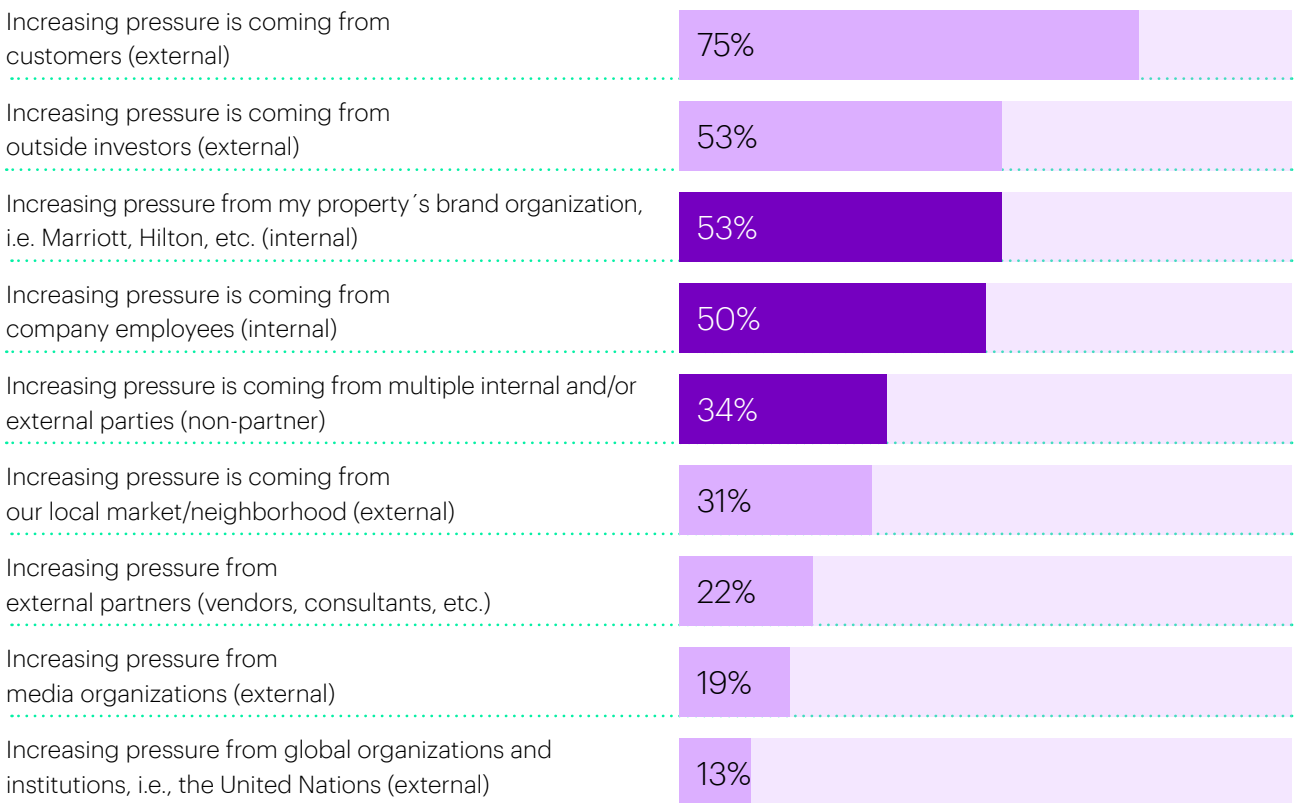


Figure 2: Increased pressure to focus on sustainability is coming from all constituencies



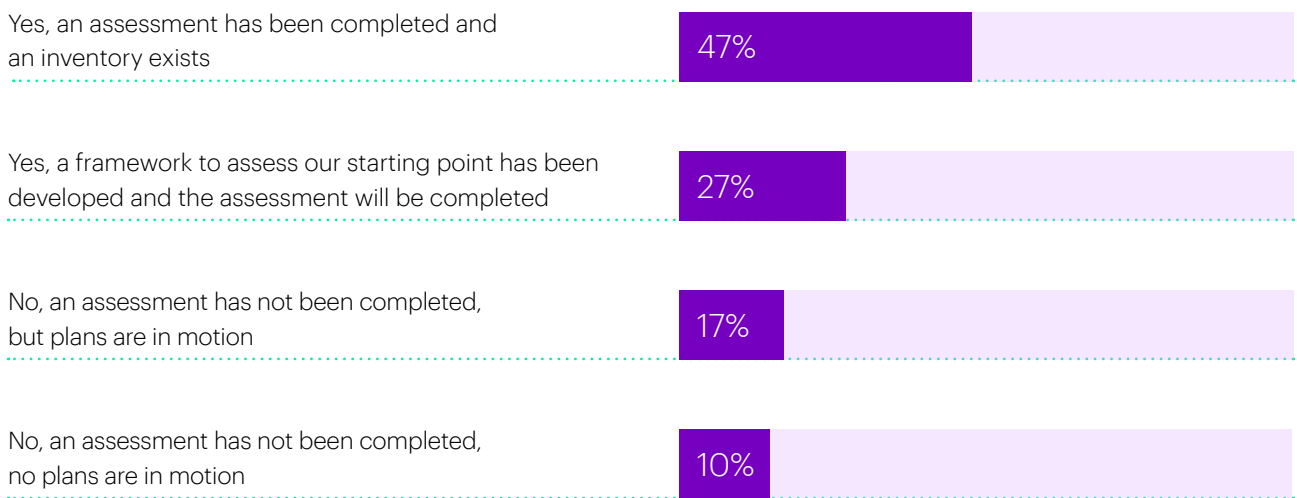
Source: the American Hotel & Lodging Association 2022 Sustainability Survey in collaboration with Accenture

Competitiveness

Hotel owners acknowledge that sustainability is a competitive driver.

Hotel owners have completed current state assessments as a starting point to gauge their properties' sustainability challenges (Figure 3). They have also taken the time to understand how their sustainability initiatives compare to competitors'. These efforts signal that owners recognize that sustainability is a differentiator. More than half (62%) have completed a benchmark against competitors (Figure 4). However, only half recognized that the results impacted their sustainability strategy.

Figure 3: Hotel owners have taken actions to assess their current sustainability



Source: the American Hotel & Lodging Association 2022 Sustainability Survey in collaboration with Accenture

Figure 4: Hotel owners are comparing their sustainability efforts to their competitors' initiatives



Source: the American Hotel & Lodging Association 2022 Sustainability Survey in collaboration with Accenture

Strategy

While most hotel owners have a sustainability strategy, most struggle to implement it.

Three-quarters of respondents have defined a strategy and are implementing initiatives. Yet more than 40% say that their sustainability strategy is missing key elements for implementation including budget, initiative details and resource allocation (Figure 5). There are several reasons owners have not defined a sustainability strategy and implementation plan. Common challenges include lack of understanding of necessary skills, lack of funding, lack of awareness from stakeholders and financial investors, lack of resources due to market conditions, lack of external resources and lack of leadership support.

Figure 5: Key elements are missing from hotel owners’ sustainability strategies



Source: the American Hotel & Lodging Association 2022 Sustainability Survey in collaboration with Accenture



Voices from the survey

For some questions, survey respondents¹⁷ provided more insight into their decision making related to sustainability strategy and investments.



Strategy

Hotels developing sustainability strategies are sharing them in public reports.

“We have a public ESG report that provides our ESG strategy and how we invest money in capital and initiatives to reduce our environmental footprint.”

“We have a strong sustainability strategy that is maintained internally and our progress to targets is communicated publicly annually in the form of our sustainability report.”

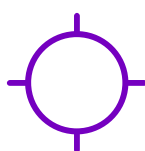


Scope 1 emission assessments

Hotels are taking focused action to understand Scope 1 emissions.

“We aggregate water, waste, energy and greenhouse gas emissions and complete annual environmental surveys to understand hotels status on various sustainability initiatives.”

“We have been monitoring Scope 1 and Scope 2 emissions since 2017 and have a decent handle on all the mentioned categories in terms of portfolio trends and areas of opportunity.”

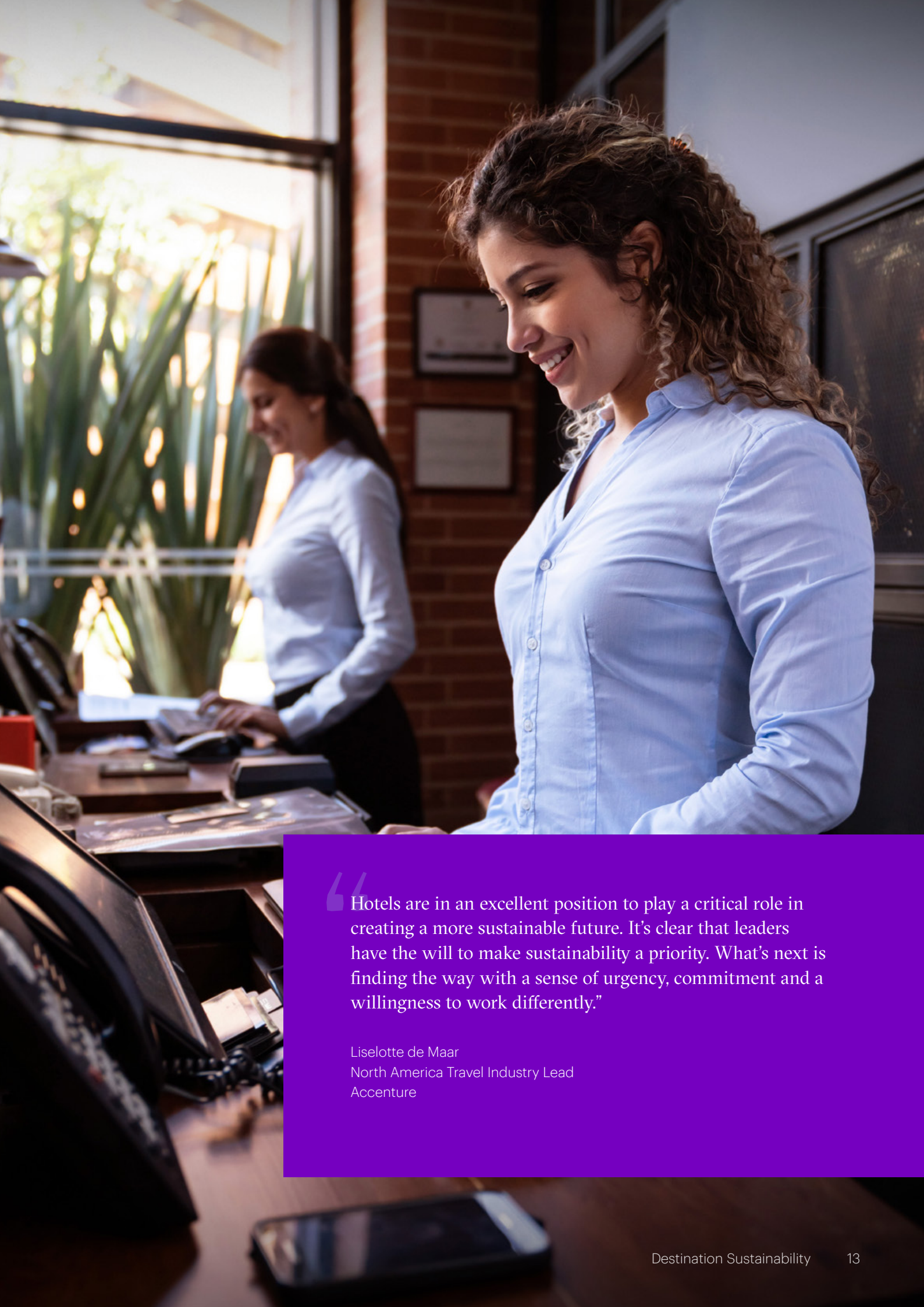


Targets

Hotels are committing to reduce emissions across existing and new properties.

“15% emissions reduction for all properties within first three years of ownership. Applies to Scope 1 and Scope 2 emissions.”

“Our organization has a 15% emissions reduction target for all new assets where we control the energy use.”



“Hotels are in an excellent position to play a critical role in creating a more sustainable future. It’s clear that leaders have the will to make sustainability a priority. What’s next is finding the way with a sense of urgency, commitment and a willingness to work differently.”

Liselotte de Maar
North America Travel Industry Lead
Accenture

What does good look like in the next five years?

Hoteliers recognize that driving sustainability is a long-term commitment. Here are some survey responses about what hoteliers are looking to achieve in the next five years.

Having a solid and successful strategy across portfolio

“A solid program would mean implementation of our top five scalable sustainability initiatives across the entire portfolio of hotels.”

“In the next five years, a sustainable transformation at our portfolio would look like: highly efficient (energy and water) buildings with smart technology, increased opportunities for guests to partner with us to increase sustainability (e.g., carbon offsets programs), increase renewability of our energy supply, high waste diversion, continued partnerships with community and non-profit organizations for philanthropic efforts related to our business, and strengthened relationships with local communities, economies and ecosystems.”

Implementing small initiatives to reduce consumption

“Continue to make small efforts to reduce our footprint via prudent lighting options, efficient thermostats and efficient PTACs (packaged thermal air conditioners).”

“Implement true recycling process in all locations along with conversion to all LED lighting in all properties.”

“Continued, significant progress on reduction of carbon emissions; strategic water conservation strategy; reduction or elimination of single use plastics in rooms.”

Meeting the goals that have been set and reporting progress on them

“Good would be meeting our performance targets, seeing an increase in renewable energy options that are financially viable, a meaningful reduction in plastic and waste generation and more cities or states, [and] developing infrastructure for reclaimed water especially in water stressed areas.”

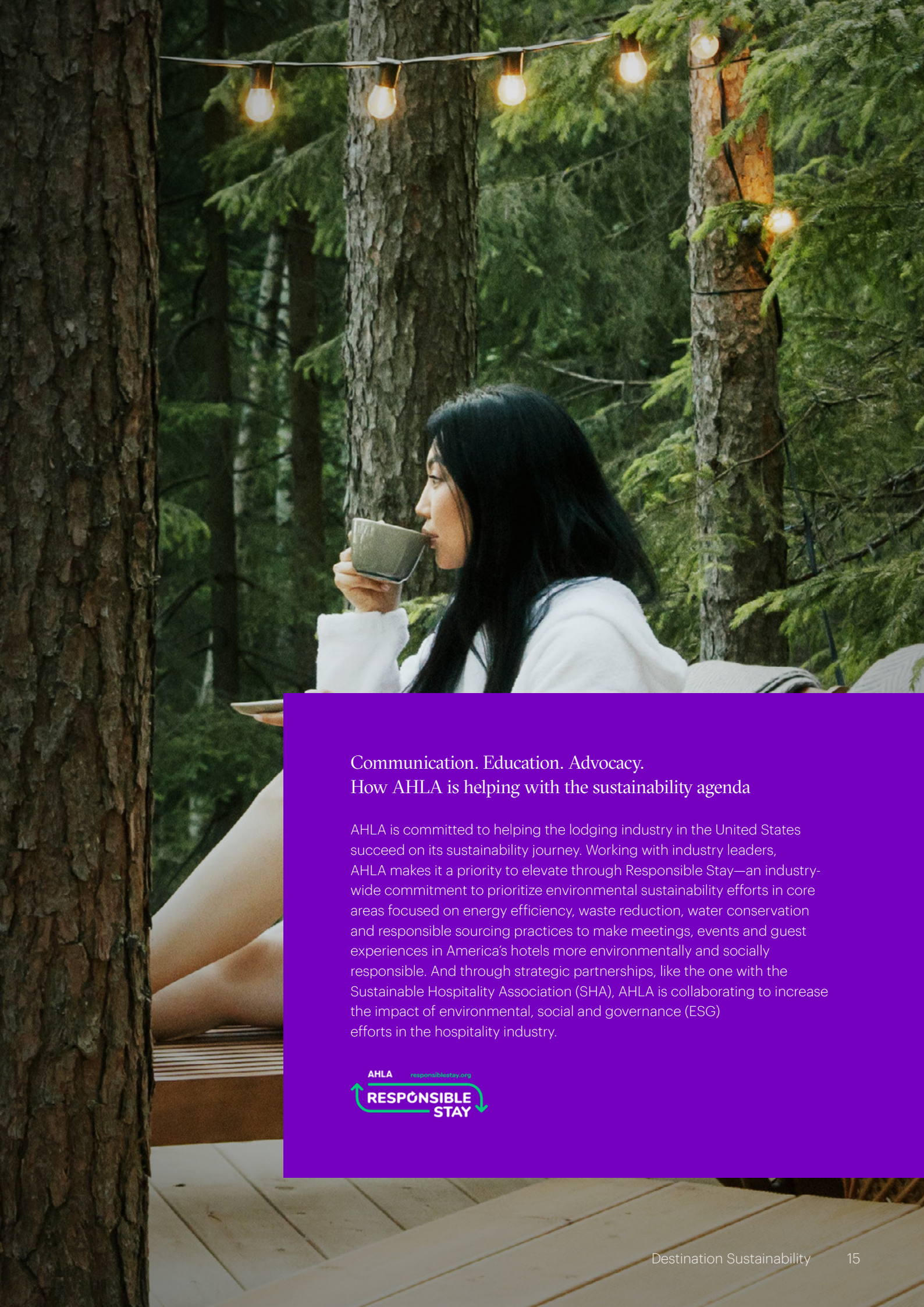
“We have a target of 50% of the properties to complete the full sustainability package we set up.”

“A reduction in energy usage or conversion to clean energy by approximately 20%.”

“Publicly announcing and tracking environmental reduction targets; having our data externally verified by a third party; utilizing green bonds to finance meaningful initiatives across our portfolio.”

Partnering with external parties

“Partnering with local Departments of Environment to audit properties and determine action plans.Reduced greenhouse gas emissions; decarbonizing our building stock, reduction of single-use plastic, water efficiency, electric car infrastructure implementation and improved waste diversion.”



Communication. Education. Advocacy. How AHLA is helping with the sustainability agenda

AHLA is committed to helping the lodging industry in the United States succeed on its sustainability journey. Working with industry leaders, AHLA makes it a priority to elevate through Responsible Stay—an industry-wide commitment to prioritize environmental sustainability efforts in core areas focused on energy efficiency, waste reduction, water conservation and responsible sourcing practices to make meetings, events and guest experiences in America's hotels more environmentally and socially responsible. And through strategic partnerships, like the one with the Sustainable Hospitality Association (SHA), AHLA is collaborating to increase the impact of environmental, social and governance (ESG) efforts in the hospitality industry.



Every destination has a starting point

The survey findings suggest that hotel owners are in a difficult position when it comes to their sustainability investments. They recognize their importance and feel the pressure to act. But many things are standing in the way of developing a targeted and resourced strategy they can implement successfully.

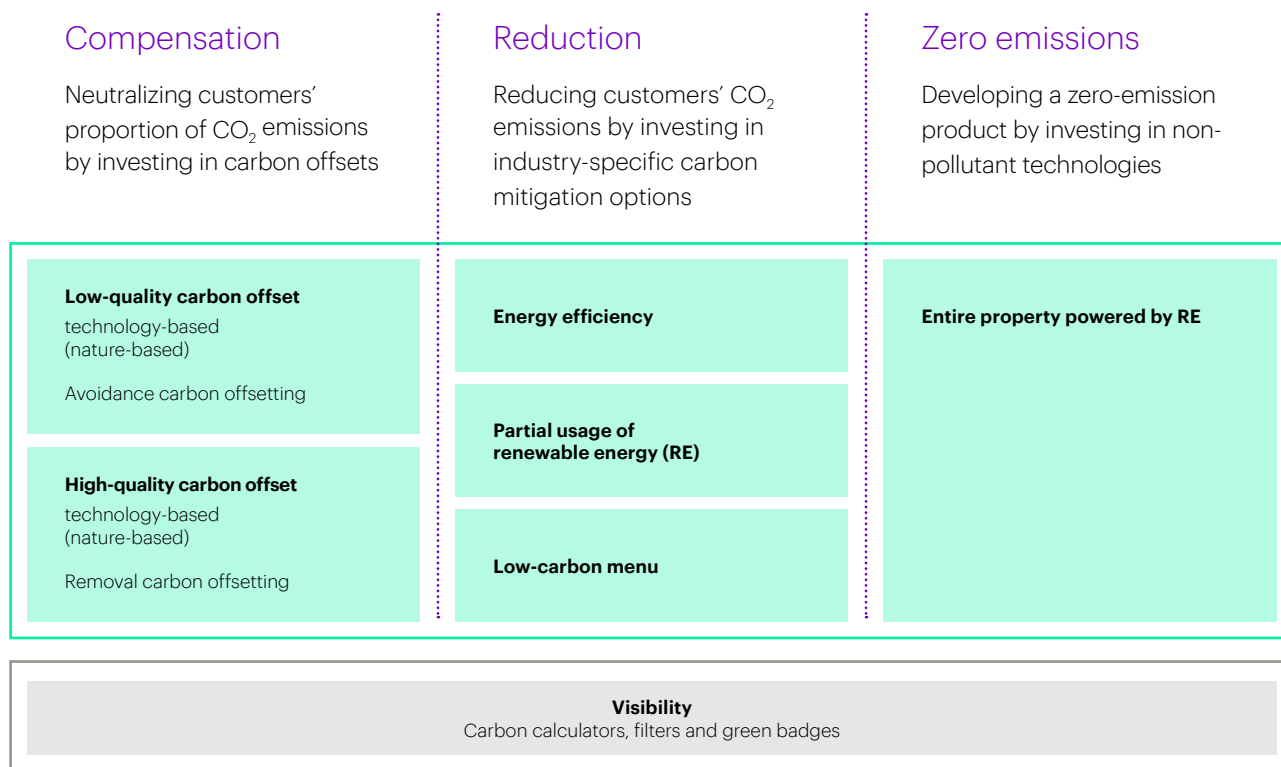
Owners' struggles connecting assessments to strategy suggest that one of the fundamental barriers is that many simply don't know where to begin. This is understandable given the extensive scope of this issue. No organization—not even global hospitality brands with significant resources—can address every aspect of the sustainability challenge at once.

The key to progress is to make decisions and set priorities with realistic expectations. Hotels can make meaningful change by building momentum from smaller, more manageable programs that involve achievable behavior change. Hotels of all sizes are already taking steps to work toward energy-efficiency

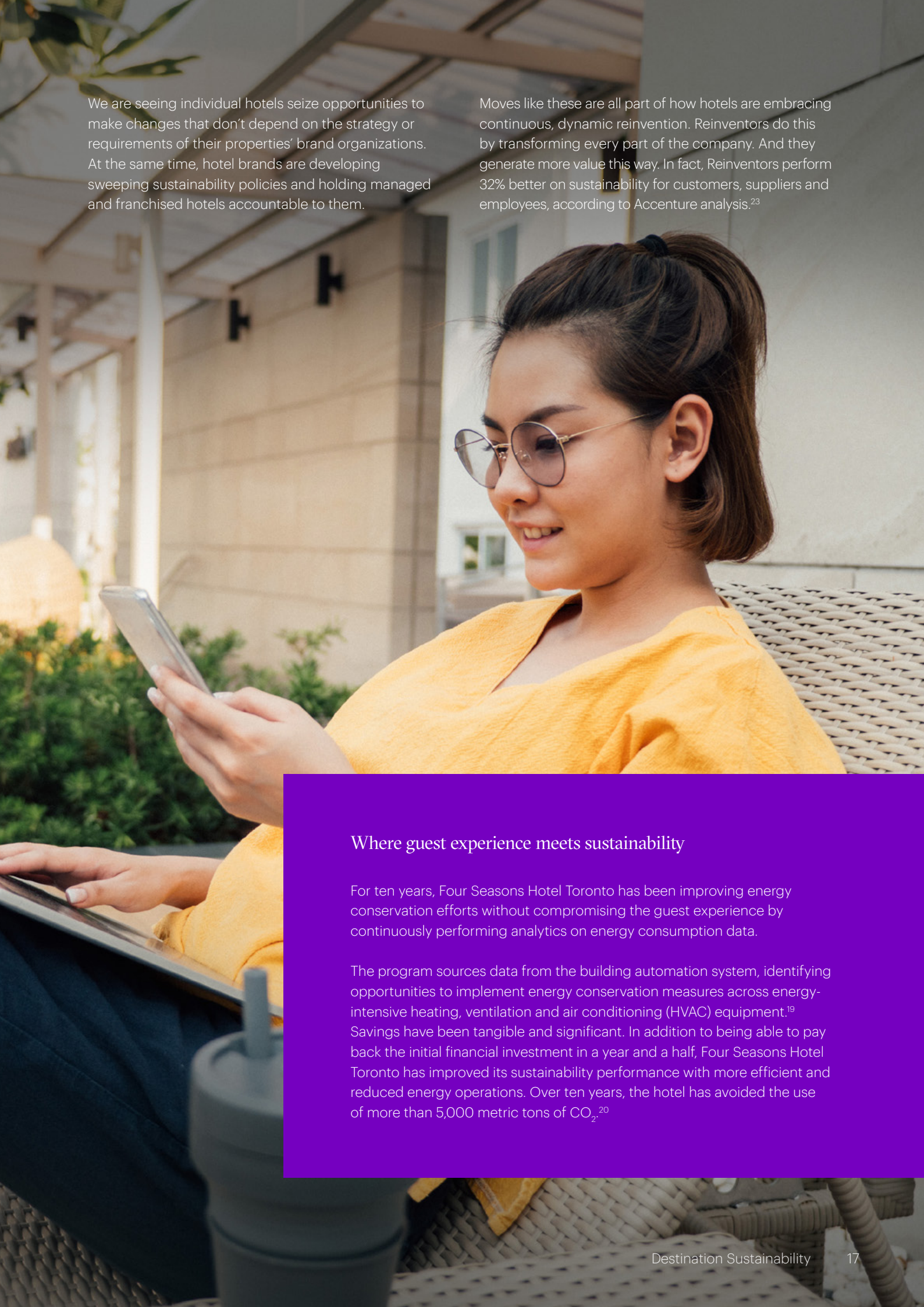
practices covering areas such as lighting, the provision of hot water, catering services and HVAC optimization.²¹ Efforts like these can jumpstart momentum, build on each other and create a virtuous loop of progress, refinement and new progress.

These initiatives can also be combined with the creation of sustainable hospitality products. Recent Accenture research in collaboration with the World Economic Forum (WEF) analyzed different sustainable product categories focused on CO₂ reduction (compensation, reduction, zero emissions) and 12 mainstream sustainability features, where these products could fit (Figure 6).²²

Figure 6: Sustainable product categories for the hospitality industry



Source: WEF, How to Create the Sustainable Travel Products Customers Want



We are seeing individual hotels seize opportunities to make changes that don't depend on the strategy or requirements of their properties' brand organizations. At the same time, hotel brands are developing sweeping sustainability policies and holding managed and franchised hotels accountable to them.

Moves like these are all part of how hotels are embracing continuous, dynamic reinvention. Reinventors do this by transforming every part of the company. And they generate more value this way. In fact, Reinventors perform 32% better on sustainability for customers, suppliers and employees, according to Accenture analysis.²³

Where guest experience meets sustainability

For ten years, Four Seasons Hotel Toronto has been improving energy conservation efforts without compromising the guest experience by continuously performing analytics on energy consumption data.

The program sources data from the building automation system, identifying opportunities to implement energy conservation measures across energy-intensive heating, ventilation and air conditioning (HVAC) equipment.¹⁹ Savings have been tangible and significant. In addition to being able to pay back the initial financial investment in a year and a half, Four Seasons Hotel Toronto has improved its sustainability performance with more efficient and reduced energy operations. Over ten years, the hotel has avoided the use of more than 5,000 metric tons of CO₂.²⁰

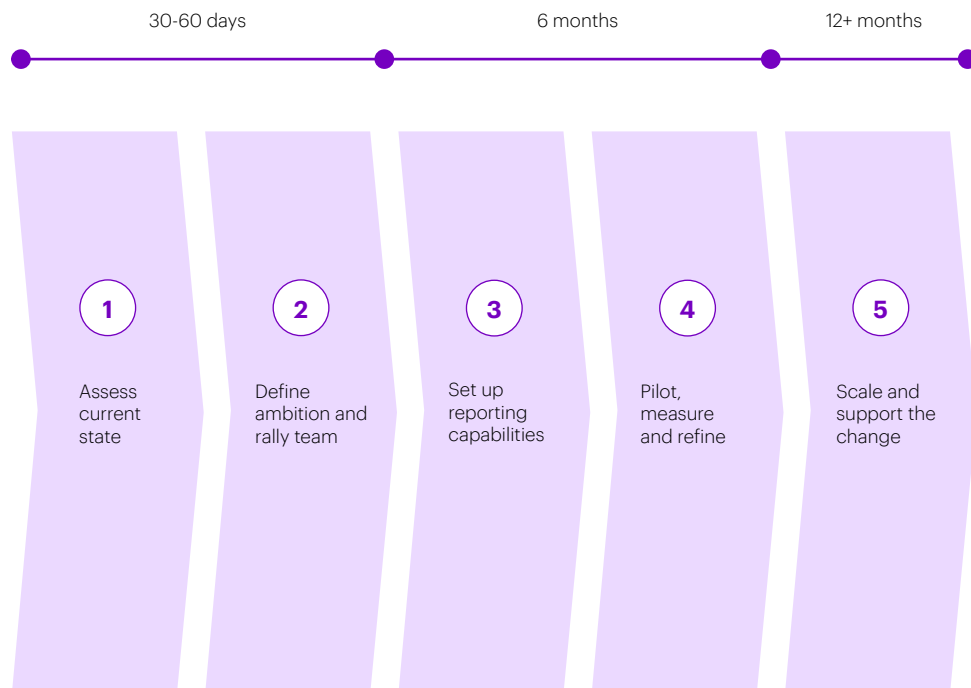
Turning awareness into action

While the survey identifies the challenges that hotel owners encounter, it also reveals several opportunities that could be addressed with a clear and practical sustainability strategy.

Common practice is to establish an Environmental Management System (EMS) such as ISO 14000, to identify the activities that have an environmental impact and their magnitude, implement an approach to setting objectives and targets, report and monitor for continued improvement, and help ensure transparent communication to employees, consumers and shareholders.

The suggested timeline below sets out a step-by-step plan that hotel owners can follow to jumpstart their sustainability strategy and put them on the path to continuous reinvention.

A phased plan for jumpstarting hospitality sustainability strategies



1

Assess current state

Challenge for survey respondents: Defining priorities with realistic expectations

Hotels should begin with defining a north star. It's key to understand the carbon footprint and sources for scope 1, 2 and 3 emissions across all properties. After all, without net zero targets, the business is unlikely to prioritize reaching a net zero goal.²⁴

Developing targets should be combined with a clear understanding of the sustainability priorities identified by each of the properties. Hotels can take advantage of surveys and focus groups to source this information. Once hotels have identified priorities, they can understand the different sustainability initiatives that already exist and those that need to be implemented across segments, locations or hotel types.

Low-hanging fruit at this stage are typically energy efficiency measures such as installing LED lights, partial renewable energy sourcing and plastic recycling among others.

2

Define ambition and rally team

Challenge for survey respondents: Building and implementing a solid and successful strategy across the portfolio

With the current situation assessed and priorities well established, hotels should look at how they can collaborate within the organization to articulate a detailed ambition and design the vision and strategy.

Now it is time to identify quick wins for the short term and establish long-term initiatives. Quick wins are key because long-term targets are unlikely to inspire immediate action, especially those with deadlines in 2050. Action in the short term and establishing intermediate targets are key to keeping momentum going. In fact, Accenture research shows that companies with multiple targets are cutting emissions faster.²⁵

The next step is to establish a governance model and nominate champions responsible for holding the company accountable. This plan should be shared with stakeholders and updated and improved to confirm realistic objectives.

3

Set up reporting capabilities

Challenge for survey respondents: Benchmarking against competitors

The next six months of the plan should begin with defining key metrics and the level of reporting for each initiative. For example, should the initiative take place at the department or property level?

As part of this, hotels should identify the targets that they are working toward when initiatives begin.

Benchmarking against competitors current state and targets then becomes a key. Given the importance of reporting capabilities, decision makers should make a point of exploring this area in more detail. Accenture has published a report—Measuring Sustainability, Creating Value—that explains how companies make environmental, social and governance (ESG) measurements a fundamental part of financial reporting.

4

Pilot, measure and refine

Challenge for survey respondents: Meeting goals and reporting progress

Now that the framework has been defined, hotels can begin on implementation. The best way forward is targeting high-value, rapid initiatives that will make an impact immediately. Along the way, hotels should continually measure results and celebrate improvements.

Tracking improvements is a good way to keep momentum going. It's an opportunity for leaders to understand the reason behind the improvement, make any necessary course corrections for better outcomes and activate the next set of actions. Throughout implementation, hotels should report results and keep driving change forward.

As momentum builds around each success, leaders can choose the next initiative, driving a culture and capability for continuous reinvention across the organization.

5

Scale and support the change

Challenge for survey respondents: Building momentum by influencing achievable behavior change and partnering with external parties

A year into the plan and having had multiple successes, hotels should look to replicate and scale across departments and properties. At this point, it's a good idea to measure the impact on customer satisfaction and business value.

It's also the moment where Reinventors are starting to define what good looks like for the industry. By sharing leading practices with industry peers, hotels will be able to expand the reach of their sustainability outcomes and open themselves up to boundaryless reinvention by connecting people, processes and data across the enterprise and beyond. Going forward, strong performance will need to focus on embracing the art of the possible.

Food for thought

One of AHLA's most successful projects over the past five years was its partnership with the World Wildlife Fund. The partnership develops practical projects to prevent food waste in the hospitality sector through the Hotel Kitchen program. The program includes the development of an adaptable toolkit on food waste, which empowers employees at all levels to manage and reduce waste in their daily operations.

In just 12 weeks, hotels participating in the Hotel Kitchen program saw reductions in food waste of up to 38%. This underscores the potential of the hospitality sector to make significant sustainability progress through a coordinated effort.

Start now to reach the destination

As hotels set their sustainability priorities and invest in capabilities to deliver on them, it's critical to simultaneously drive top-down and bottom-up cultural change. Reinvention is boundaryless and implementing sustainability initiatives involves changing human behaviors and mindsets. And doing it at every level of the organization, tackling capabilities completely.

There is also work to do outside the organization. Hotels should take the lead on making guests part of their sustainability journeys. For example, hotels can help to educate leisure travelers on the benefits of everything from choosing local cuisine to minimizing water usage. In the business travel space, hotels can form corporate partnerships around shared sustainability commitments. There's great opportunity to realize a meaningful uptick in more sustainable behaviors with minimal guidance.

At the same time, having a digital core which leverages the power of technology is a critical enabler of any sustainability agenda and accelerates the net-zero transition. It's essential for reaching net-zero goals in everything from measuring and reporting progress to connecting ecosystem players and driving innovation. We are already seeing an impact from innovations like smart thermostats and connected rooms.

Hotels have no time to waste to create a more sustainable future. With 2050 just over the horizon, now is the time to act.

While the sustainability challenge is different for every hotel depending on its real estate footprint, size, location and many other factors, change doesn't have to happen at once. It just has to start. Reinvention is continuous and should be the central strategy for the hotel industry going forward. Positive changes can build on each other, taking this industry further on the journey of a lifetime—the journey to a more sustainable future.



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- ¹⁶ See About The American Hotel & Lodging Association 2022 Sustainability Survey for more information.
- ¹⁷ All quotes are from anonymous survey respondents.
- ¹⁸ All quotes are from anonymous survey respondents.

- ¹⁹ Energy conservation measures include chilled water temperature resets, boiler sequencing and balancing measures, air handling unit setbacks, optimized dehumidification strategies, and others.
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About Accenture

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About The American Hotel & Lodging Association 2022 Sustainability Survey in collaboration with Accenture

Accenture and AHLA conducted a survey among AHLA's membership, which is comprised of approximately 110 ownership groups that are corporate entities and have at least one property in their portfolio. The survey was sent in two waves to approximately 400 contacts at these member ownership groups across the United States. More than half of these groups have properties in multiple regions of the country. We conducted the survey to explore the maturity of AHLA members' environmental sustainability readiness from the perspective of various categories of hotels and lodging owners, and more specifically, to understand net zero transition across scope 1, 2 and 3 emissions. The fieldwork was conducted between July and August 2022.

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