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Stay Green

STAY GREEN: THE CENTRAL ROLE OF
THE HOTEL IN SUSTAINABLE BUSINESS
TRAVEL, MEETINGS, AND EVENTS

DON'T *do business* WITHOUT IT™

Hilton



Welcome

As the world returns to travel, the travel and meetings sector is in the spotlight. Our key stakeholders - including business leaders, investors, and travellers - are looking to us to help them achieve sustainability goals. Progressive travel managers have accepted the challenge and are exploring how they can reduce the environmental footprint of their travel programs.

Carbon reduction is often the primary focus for business travel sustainability initiatives, as confirmed by research among travel managers and procurement officers commissioned for this report. While decarbonization is a critical imperative for the industry, reducing carbon is just one opportunity for improving overall sustainability across travel and meetings, particularly when it comes to the hotel stay. Here, being “green” is complex and encompasses waste management, energy and water conservation, and responsible sourcing – as well as wider sustainability goals such as social impact on employees and host communities.

American Express Global Business Travel (Amex GBT) Global Business Consulting (GBC) has developed **Stay Green** to take the pulse of global travel and meetings with respect to hotel sustainability. We’ve investigated where organizations are focusing their green initiatives and asked them to assess how far they have progressed.

At Amex GBT, we believe business travel can drive progress across the economic, social, and environmental domains. By partnering with Hilton to create this report, we hope to increase awareness and understanding of the central role of hotel in sustainable travel and meetings. And we want to help travel managers understand their role in driving hotel sustainability, and ultimately helping their organizations achieve their sustainability ambitions. The opportunity is there for the taking. We conclude **Stay Green** with considerations to help speed the travel manager on their sustainability journey.

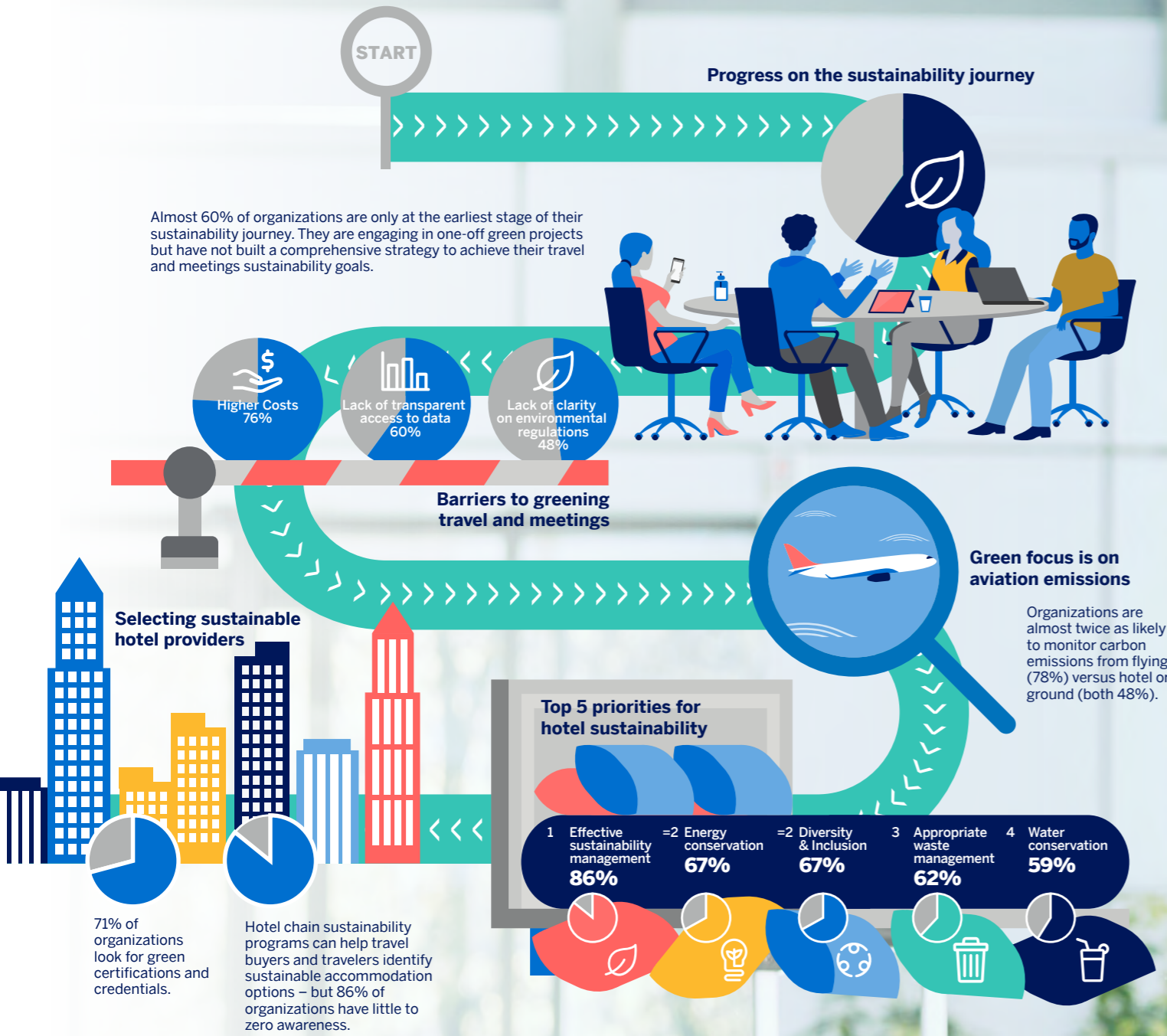
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Fig. 1. The journey to hotel sustainability.

GBC surveyed travel managers and procurement professionals in 50 organizations around the world about their hotel sustainability priorities and progress.



Global survey of travel managers and procurement professionals carried out by American Express Global Business Consulting for Stay Green: The Central Role of the Hotel in Sustainable Business Travel, Meetings, and Events. 50 organizations polled between March – April 2022.



Travel embraces sustainability

Business travel is recovering, spurred by pent-up demand for in-person interactions. The return to travel is accompanied by a strong drive to reduce negative environmental impacts.



TRAVEL AND MEETINGS ROAR BACK TO LIFE

2022 has seen the global travel and meetings industry stage a marked recovery. By June, Amex GBT transactions had reached 76% of 2019 levels.¹ In the same month, the Global Business Travel Association (GBTA) Business Travel Recovery Poll was seeing record levels of travel permissions and optimism about future travel plans.²

After the long travel shutdown, business travelers appear keen to get back to in-person meetings. Anticipating looser travel restrictions, nearly two-thirds of meetings and events professionals were increasing their budgets for 2022.³ Research conducted for this report found that more than a third of travel managers plan to run 40% or more of their internal meetings at a hotel, confirming the desire to bring employees together face-to-face.



SUSTAINABILITY AS A BUSINESS PRIORITY

The return to travel occurs as sustainability rises to the top of the business and social agenda. In a recent survey by IBM, almost half (48%) of CEOs say increasing sustainability is one of their highest priorities in the next two to three years – up from roughly a third in 2021. Nearly 70% of CEOs in the same survey say they are directly involved in defining their organization's sustainability strategy.⁴

Employees share boardroom concerns about sustainability. Studies have found that employees and employment seekers alike say that environmentally sustainable companies make for more attractive employers.⁵ Younger employees

are particularly engaged on the topic. In the 2022 Deloitte Global Gen Z and Millennial Survey, both the Gen Z and millennial employee cohorts ranked climate change as their number two concern, behind cost of living.⁶

Companies can find themselves under increased scrutiny for their environmental track record with major stakeholders viewing sustainability as an indicator of a well-managed organization. For example, BlackRock, the world's largest asset manager, invests with the view that "companies with strong profiles on material sustainability issues have potential to outperform those with poor profiles."⁷

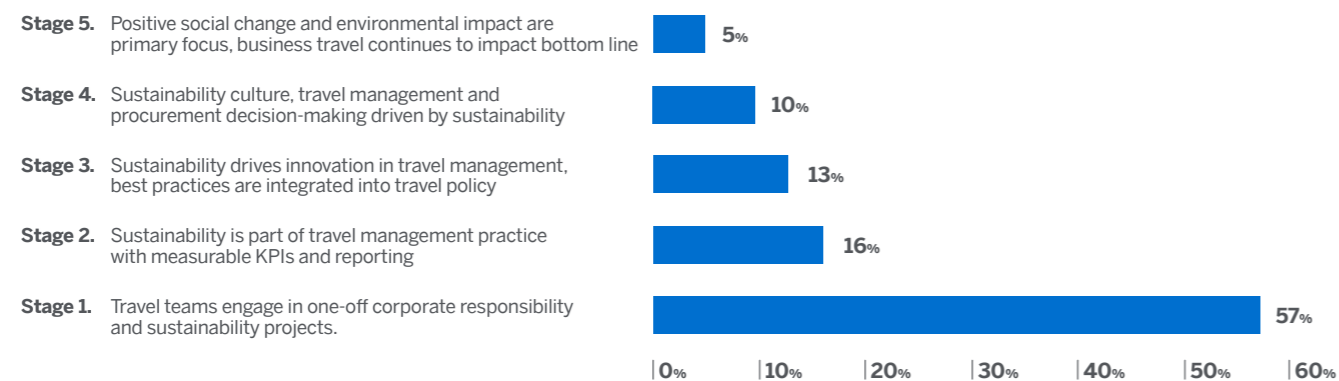


TRAVEL AND MEETINGS TAKE THE INITIATIVE

Travel and meeting professionals have aligned themselves with their organizations' green commitments. According to the GBTA, almost 9 in 10 industry professionals say that sustainability is a priority in their companies.⁸ The Stay Green research carried out for this report confirms that many organizations are ready to put their money where their mouths are by allocating budget for sustainable meetings and events. 37% of respondents indicated they will dedicate budget for more sustainable events in the future.

That said, despite sustainability's high profile, most organizations – 57% of the companies surveyed for this white paper – are only at the earliest stage of their sustainable travel journey (see Fig.2.). These organizations engage in one-off projects on corporate responsibility and sustainability. However, there is no overarching strategy for delivering and measuring progress on green initiatives.

FIG.2. WHERE IS YOUR ORGANIZATION ON ITS SUSTAINABLE BUSINESS TRAVEL JOURNEY?



Many organizations (57%) are today only at the earliest stage of their journey to sustainable meetings and events.

Global survey of travel managers and procurement professionals carried out by American Express Global Business Consulting for Stay Green: The Central Role of the Hotel in Sustainable Business Travel, Meetings, and Events. 50 organizations polled between March – April 2022.

The 15% of companies that have attained stage 2 in the journey have incorporated sustainability into travel management practices and reporting. By stage 3, sustainability is driving innovation across the travel program and is integrated into travel policy (for example, including a recommendation to use electric vehicles (EVs)).

Fewer than 10% of organizations have reached stage 4, where the travel and procurement functions have adopted a culture of sustainability and include it in all decision-making. Just 5% of respondents say that their organization has gone furthest on its sustainability journey, where positive social change and environmental impact are seen as the primary focus of a travel and meetings program that continues to allow the company to achieve business goals.

What's holding you back?

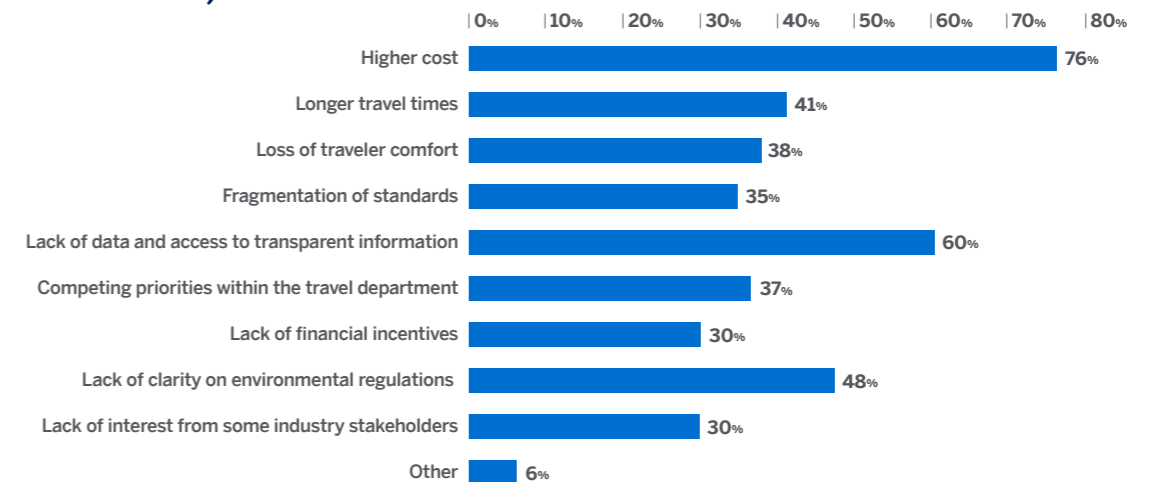
Clearly, organizations are at different stages on adopting and implementing sustainable business travel. Some companies may be more motivated to make progress on the journey to sustainable business travel, depending on their sector. Travel can represent a higher – and highly visible – proportion of greenhouse gas emissions for a professional services company. It should be obvious to these organizations that they need to advance their travel and meetings sustainability strategy to reach their carbon reduction targets. In contrast, a manufacturer may produce most of its emissions from its core operations; travel and meetings will represent only a small proportion of its overall footprint.

The survey asked travel managers and procurement officers to consider the obstacles they have encountered on their sustainable business travel journey (see Fig.3.). The number one barrier – higher cost – was selected by more than 70% of the poll. There is a perception that sustainability initiatives in travel and meetings will always increase cost. However, these initiatives can decrease costs by shifting travelers to direct flights or be cost neutral because often the greenest solution can equally contribute to a better guest experience.

Next in the ranking comes “lack of data and access to transparent information” and this may account for perceptions about higher costs associated with sustainability. Transparent, reliable data – presented in an intuitive and compelling way - is critical for making informed decisions. A data visualization engine, such as that developed by GBC for Amex GBT's Green Compass proposition, can help companies understand the implications of their decisions to decarbonize travel and meetings. Travel managers can see how a decision to use more efficient aircraft, for example, will impact carbon emissions, traveler experience and cost.

Travel managers also encounter a lack of clarity when it comes to environmental regulations. This is especially true in today's globalized context. Each country may have its own guidelines for carbon reporting, and its own definition of what is considered “sustainable”. At the same time, corporate guidelines may be aligned to the environmental regulations of the organization's home country: a UK company's New York office may have to report carbon emissions using both UK Department for Environment, Food & Rural Affairs (DEFRA) and US Environmental Protection Agency (EPA) guidelines.

FIG. 3. WHAT ARE THE BIGGEST BARRIERS TO ENACTING SUSTAINABLE BUSINESS TRAVEL? (SELECT ALL THAT APPLY)



Perceptions about higher costs are the number one obstacle to sustainable travel and meetings initiatives. Lack of data and information transparency are seen as a barrier by 60% of respondents.

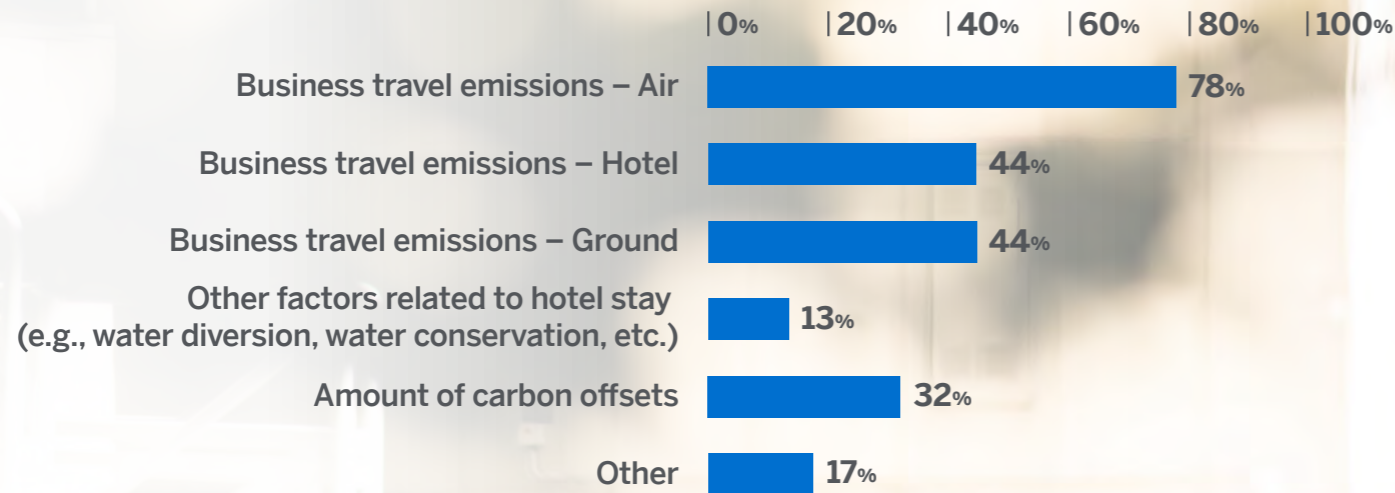
Global survey of travel managers and procurement professionals carried out by American Express Global Business Consulting for Stay Green: The Central Role of the Hotel in Sustainable Business Travel, Meetings, and Events. 50 organizations polled between March – April 2022.

Measure to manage – sustainability KPIs

When it comes to sustainability key performance indicators (KPIs), travel and procurement managers have tended to focus on greenhouse gases associated with flying. This is perhaps not surprising. Global aviation has been vocal about its emissions impact for more than a decade. The International Air Transport Association (IATA) first committed to carbon-neutral growth as early as 2009; in 2021, IATA pledged to reach net zero carbon emissions by 2050. In contrast, global hospitality has been more fragmented in its approach; for example, there remains a lack of consistency regarding hotel carbon measurement at the property level.⁹

Just 14% of respondents say they are looking at factors other than carbon associated with hotel stays. However – and as will be explored in the next section – hotel offers significant opportunities to green the travel program.

FIG.4. WHAT KPIS ARE MEASURED, TRACKED AND/OR REPORTED TO SUPPORT SUSTAINABLE TRAVEL INITIATIVES? (SELECT ALL THAT APPLY)



Travel and procurement professionals are almost twice as likely to monitor carbon emissions from flying (78%) versus hotel or ground transportation (both 44%). Hotel sustainability KPIs such as water conservation are followed by just 14% of respondents.

Global survey of travel managers and procurement professionals carried out by American Express Global Business Consulting for Stay Green: The Central Role of the Hotel in Sustainable Business Travel, Meetings, and Events. 50 organizations polled between March – April 2022.

The hotel sustainability landscape

Hotel offers significant opportunities to make business travel and meetings more sustainable – but to realize the gains, organizations need to understand the multiple ways hotel can help reduce environmental impacts and support positive social outcomes.

UNDERSTANDING THE OPPORTUNITY

As noted, organizations tend to focus carbon emissions when they think about hotel sustainability and more sustainable travel and meetings. But carbon is just one dimension of a complex and multi-

layered topic that encompasses the social impact of the hotel on employees and host communities, responsible procurement, waste management, energy and water conservation, ecosystem conservation, and diversity and inclusion.

FIG. 5. THERE'S MORE TO HOTEL SUSTAINABILITY THAN CARBON EMISSIONS.



Travel and procurement professionals are almost twice as likely to monitor carbon emissions from flying (78%) versus hotel or ground transportation (both 44%). Hotel sustainability KPIs such as water conservation are followed by just 14% of respondents.

Global survey of travel managers and procurement professionals carried out by American Express Global Business Consulting for Stay Green: The Central Role of the Hotel in Sustainable Business Travel, Meetings, and Events. 50 organizations polled between March – April 2022.

KEY HOTEL SUSTAINABILITY PRIORITIES

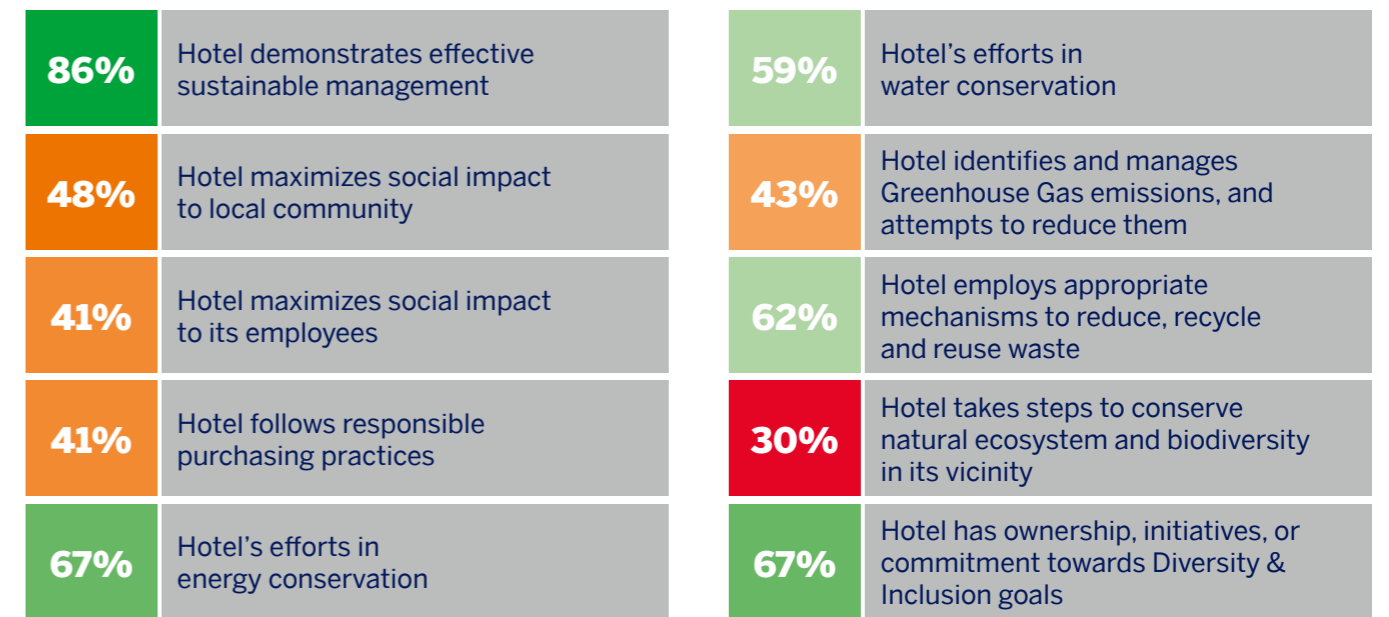
To better understand how organizations engage with hotel sustainability, the Stay Green survey asked travel managers and procurement officers to rank their priorities across 10 key topics ranging from energy and water conservation practices to responsible purchasing and community relations. Based on the poll, it is clear that the majority of organizations (86%) want to work with hotels that can demonstrate effective sustainable management practices (see Fig.6.). By some measure, this is the travel manager's top priority.

Energy and water conservation are important topics, scoring 68% and 59% respectively. A significant proportion of organizations want assurance that the hotel has an appropriate waste management regime in place. Given the indications that travel managers and procurement officers tend to prioritize hotel carbon emissions (Fig.4.), it is interesting that less than half (43%) are looking for hotels that have processes in place to identify, manage, and reduce carbon emissions.

Organizations appear to understand the importance of working with hotel providers who are aligned with their wider sustainability goals and social progress priorities. 67% of respondents say they prioritize the hotel's ownership initiatives or commitment to diversity and inclusion goals.

Reflecting the growing focus on corporate responsibility topics in purchasing, GBC partnered with meetings technology provider Cvent in 2021 to create 47 hotel sourcing questions focused on sustainability, diversity, equity, and inclusion for the 2022 sourcing season. The new questions are supplemental to the GBTA's RFP template.¹⁰

FIG.6. WHAT ARE THE MOST IMPORTANT HOTEL SUSTAINABILITY KPIS? (SELECT ALL THE APPLY)



Organizations prioritize hotels that can demonstrate effective sustainable management practices. Energy conservation and management are considered key topics – but companies also care about hotels' performance on diversity and inclusion initiatives.

Global survey of travel managers and procurement professionals carried out by American Express Global Business Consulting for Stay Green: The Central Role of the Hotel in Sustainable Business Travel, Meetings, and Events. 50 organizations polled between March – April 2022.

Greener meetings

Amex GBT Meetings & Events sustainability solutions help organizations reduce and measure their event carbon emissions through two components. The Sustainable Meetings Program advisory solution allows customers to benefit from the expertise of highly skilled teams who will help them assess their meetings program and develop an end-to-end sustainability strategy. The Carbon Neutral Events solution helps organizations reduce, measure, and offset meetings and events emissions. The proprietary Amex GBT event carbon calculator identifies the carbon footprint and other sustainability metrics to help customers understand the relative impact of each event category. With this insight, customers can calculate the amount of offsetting measures needed to achieve event carbon neutrality.



Helping travelers make greener choices

Traveler behavior has a key role in hotel sustainability. A business traveler may have only one or two options to fly on a particular city pair – but many times more hotel choices available at a destination.

The Stay Green survey asked travel managers and procurement officers where they wanted to encourage or mandate changes in traveler behavior change. 76% of respondents wanted to see their travelers give preference to energy efficient hotels and meeting venues. 73% wanted travelers to prioritize air routes with the smallest carbon footprints.

Hotel certifications can play an important role in driving greener choices, helping travelers rapidly identify properties that meet recognized sustainability standards. The Global Sustainable Tourism Council (GSTC) is an independent and neutral non-profit organization that operates international hotel accreditation schemes that encompass sustainable management, socioeconomic impacts, cultural impacts, and environmental impacts.

Most travel managers and procurement appear to see the value of certifications offered by credible providers such as GSTC. 71% of Stay Green survey respondents said green certifications and credentials were of medium-to-high importance when selecting preferred suppliers.

Major hotel chains such as Hilton, InterContinental Hotels Group (IHG), Marriott, Radisson, and many others have their own sustainability programs where they encourage their managed or affiliated hotels to adopt sustainable practices.¹¹ Often accredited by bodies such as GSTC, these programs could also support traveler choice, helping travelers identify sustainable hotel providers. However, the majority (86%) of respondents to the Stay Green survey had little to zero awareness of hotel chain sustainability programs.

Hotel sustainability programs: **Hilton LightStay**

A winner of Standard & Poor's 2021 Gold Class Sustainability Award and recognized by the Global Sustainability Tourism Council (GSTC), Hilton operates the LightStay program, a measurement platform that tracks and manages environmental and social impact across its global portfolio of hotels. This level of coverage means the program has significant impact. Since setting sustainability goals in 2018, LightStay data reports that Hilton has achieved a 50% reduction in carbon emission intensity, a 39% reduction in water intensity, and a 70% reduction in landfill intensity within its managed hotels.¹²

Smart Reporting



Sales Report

Meeting Impact Calculator Report

Transient Room Night Emissions

- ✓ First major hospitality company to require sustainability measurement as a brand standard
- ✓ LightStay enables hotels to track, analyze and improve their environmental and social impact
- ✓ Over \$1billion to date in estimated utility savings from sustainable operations

Originally designed to track environmental data, LightStay has evolved to measure, manage and report all of Hilton's environmental and social performance metrics. Hilton has continued to enhance and customize LightStay with features that include localized risk indices on material issues for the company – including disaster vulnerability, water risk and modern slavery risk – to inform each hotel's priorities. LightStay's machine-learning algorithm also predicts each hotel's energy, water and waste performance and corresponding costs, and tracks actual consumption against these predictive models. As a global brand standard, every hotel in Hilton's global portfolio is required to use LightStay to track its corporate responsibility performance against prior years and against peers.

LightStay features a Meeting Impact Calculator to support meetings and events. This tracks all the metrics that a meeting planner and other clients may need to demonstrate environmental impact of their meeting or event. Energy use, water use, and waste diversion are just some of the metrics which can easily be overlooked when executing an event.

By addressing the multiple elements of hotel sustainability, a program such as Hilton LightStay can help organizations select hotels that align with their environmental and social goals. For travelers, these branded programs can make it easier to choose a more sustainable hotel option. However, as noted, knowledge of hotel sustainability programs is low. Looking specifically at Hilton LightStay, 21% of Stay Green respondents were not aware of the program. Just 6% were using LightStay to receive tailored reports about their stays.

Implementing hotel sustainability

As travel and meetings return, how can organizations put hotel sustainability at the heart of their travel program? Stay Green concludes with a set of key considerations for travel managers.

It's clear that sustainability is now a top-of-agenda issue for many organizations and most travel programs. Few travel industry professionals would argue that sustainability is not a priority for their companies.¹³

As revealed by the Stay Green research carried out for this report, most organizations are only at the earliest stages of their sustainability journeys, pursuing discreet projects rather than managing holistic programs aimed at delivering

comprehensive sustainability improvements. When it comes to monitoring environmental topics, travel managers tend to focus on carbon emissions – primarily from flying. Few are actively tracking hotel sustainability today, but it seems that travel managers understand the range of opportunities to progress sustainability in hotels.

Hotel sustainability programs – such as Hilton LightStay – have helped hotel chains drive significant sustainability improvements and can help organizations and travelers identify hotel options that align with their environmental and social progress goals.

Taking the next steps: 5 key considerations

GBC offers the following considerations to help travel managers integrate hotel sustainability into their travel and meeting programs.

Understand what hotel sustainability means for your organization. Work with your Environmental, Social and Governance (ESG) teams, travel management company (TMC) partners, and other experts to identify criteria that can help you define “greener” hotels. Also, identify hotel suppliers that can deliver robust environmental data and are aligned with purpose driven offerings such as Hilton LightStay that evaluate hotels on those criteria. The GSTC website is an excellent source to learn more about defining hotel sustainability.

Develop and identify targets and metrics to track the performance of your preferred hotel program, preferred meeting venue programs and their usage. Source data and monitor these metrics as part of your corporate hotel RFPs. Identify improvement opportunities as you track their progress.

Communicate with hotel partners. Use corporate hotel RFPs, venue sourcing exercises, review meetings and other regular communication with preferred hotels and chains to continuously emphasize the importance of these sustainability criteria and metrics to your organization.

Design an internal communication plan. Identify the audience and stakeholders whose buy-in you need for the hotel sustainability best practices, especially if a change in policy is required. Identify and implement content across all the channels to your target audience. These can include social media platforms, employee training, e-mail banners, infographics etc. Keep the message simple and memorable. For example, remind business travelers and meeting attendees to choose recyclable goods and reduce use of non-recyclables, to reuse towels and to switch off electric appliances when leaving guest rooms.

Review policy and governance. Identify areas in your business travel and meetings policies where green hotel practices and desirable traveler behavior can be integrated, and either mandates or recommendations can be incorporated. Once these policy elements are identified, conversations on governance, change management and communications become easier. Regular oversight from senior management can improve organizational accountability for results.

Applying the 5 key considerations

What does integrating sustainability into travel and meetings look like? In this illustration, a company has identified waste management as a key factor in hotel sustainability and started to track waste diversion ratio, a measure which represents the amount of waste that is diverted from landfill for recycling.



Myth buster

The conversations held with travel managers for the Stay Green research uncovered misconceptions about implementing sustainable business travel and meetings. Here, GBC discusses five of the most frequent myths – and suggests how travel managers can overcome them to drive their sustainability programs and achieve their goals.

Myths	Internal Challenges/ Barriers	Truths
Sustainable business travel is expensive.	No budget for sustainability initiatives.	Sustainable business travel options need not be costly versus less sustainable options. Many sustainable measures adopted by travel partners can help lower operational costs. For example, energy-efficiency, reduced hotel amenities, and procuring local food produce can all reduce hotel operational costs.
Chain-level Sustainability programs are only marketing tools.	Unfamiliarity with how hotel chain-level programs operate.	Hotel chain-level programs do not classify each member or represented hotel as sustainable. They provide a common set of guidelines and criteria which individual hotels should match to qualify for the programs. The hotel is evaluated against these criteria. Measurement and reporting are in place to track the hotel's progress on attaining sustainability goals.
I don't know where to start on hotel sustainability.	Lack of experience and support in this topic.	Start by understanding what hotel sustainability means for your organization. Work with your ESG teams and other TMC partners and experts such as GBC, to identify criteria that can help you define "greener" hotels. Also, identify certifications and chain programs such as Hilton Light Stay that evaluate hotels on those criteria. Refer to the section Taking the next steps: 5 key considerations on pages 16-17.
Hotels do not contribute significantly to total trip emissions.	Underestimating the role of the hotel in sustainability.	The hotel stay can contribute to a trip's carbon footprint. According to the Sustainable Hospitality Alliance, the hotel sector accounts for around 1% of global carbon emissions. ¹⁴ However, as discussed in this paper, there's more to hotel sustainability than carbon. The topic extends to social impact on employees and host communities, responsible procurement, waste management, energy and water conservation, ecosystem conservation and diversity and inclusion.
Sustainability is too complex for business travel management teams to lead.	Need for more cross-functional working.	Business travel and meetings sustainability is a complex topic that touches many stakeholders. Implementing solutions will likely require a team effort with colleagues and external partners contributing. With its specialist expertise and relationships across the organization, the travel management team can bring the relevant people to the table and provide leadership for the initiative. Remember, travel management teams can call on specialized support from TMCs, airline and hotel providers.

Stay Green research methodology

GBC surveyed travel managers and procurement officers in 50 companies between March and April 2022. Respondents came from a variety of industrial sectors including Manufacturing, Computer & Technology, Pharmaceutical & Medical, Banking & Financial Services, Business & Consumer Services, and Retail & Wholesale.



About Hilton¹⁵

Hilton (NYSE: HLT) is a leading global hospitality company with a portfolio of 18 world-class brands comprising 7,000 properties and 1.1 million rooms, in 122 countries and territories. Dedicated to fulfilling its founding vision to fill the earth with the light and warmth of hospitality, Hilton has welcomed more than 3 billion guests in its more than 100-year history, earned a top spot on Fortune's 100 Best Companies to Work For list and been recognized as a global leader on the Dow Jones Sustainability Indices for five consecutive years. Hilton has introduced several industry-leading technology enhancements to improve the guest experience, including Digital Key Share, automated complimentary room upgrades and the ability to book confirmed connecting rooms. Through the award-winning guest loyalty program Hilton Honors, the 139 million members who book directly with Hilton can earn Points for hotel stays and experiences money can't buy. With the free Hilton Honors app, guests can book their stay, select their room, check in, unlock their door with a Digital Key and check out, all from their smartphone.

Visit stories.hilton.com for more information, and connect with Hilton on [Facebook](#), [Twitter](#), [LinkedIn](#), [Instagram](#) and [YouTube](#).

About American Express Global Business Travel

American Express Global Business Travel (Amex GBT) is the world's leading B2B travel platform, providing software and services to manage travel, expenses, and meetings and events for companies of all sizes. We have built the most valuable marketplace in B2B travel to deliver unrivalled choice, value, and experiences. With travel professionals in more than 140 countries, our customers and travelers enjoy the powerful backing of American Express Global Business Travel.

SUSTAINABILITY AT AMERICAN EXPRESS GLOBAL BUSINESS TRAVEL

We are a purpose-driven company with ESG at the heart of our business. Our purpose is to power economic, social, and environmental progress – and to contribute to the United Nations Sustainable Development Goals. Our leadership on sustainability includes the following proof points:

- Committed to the Science Based Targets initiative (SBTi), pursuing a defined pathway for reducing GHG (Greenhouse Gas) emissions in accordance with climate science.
- Signed the World Economic Forum Clean Skies for Tomorrow ambition statement to achieve 10% SAF by 2030.
- Built a marketplace for green business travel with sustainability-focused products and services including tools to track and report, influence choice, procure green, invest in carbon offsets and insets.

Visit amexglobalbusinesstravel.com for more information about Amex GBT, and follow [@amexgbt](https://twitter.com/amexgbt) on [Twitter](#), [LinkedIn](#), and [Instagram](#).

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