

*#FromChange
ToOpportunity*



The New Quality Of Time

How The World's New Tempo
Is Impacting Hospitality

SEPTEMBER 2024



ACCOR

Foreword

The Perception of Time is Changing

The essence of hospitality has always been about giving people a special moment in time: enjoying time away from the everyday, good times celebrated together, a memorable time in life, taking time out, and work time well invested in collaboration and performance.

But the world doesn't view time as it once did. Societal shifts — accelerated by lightning-speed technological developments — have eradicated old school beliefs. Today, time has greater value because once lost, it cannot be recovered. We are now experiencing a demand for hyper-flexible time, strive to slow time down (vacations, time off, aging), feel we are running out of time (natural resources and climate change), and are, essentially, establishing new rules for time overall.

Since hotels are places where people spend time outside of their regular routine — viewing this time away

from home as beneficial and enjoyable — we must recognize this changing perception of time impacts needs and expectations. How do we then incorporate this philosophy into our industry and our services, offerings, and operations to meet these transformed viewpoints and requirements?

Accor's *The New Quality Of Time* — the latest report in our **From Change To Opportunity** thought leadership series — identifies many of these fluctuating attitudes toward time, provides insights into the impact they have on our industry, and pinpoints potential business opportunities evolving from these trends to successfully leverage our new fascination with time. There's actually never been a better time to address this mindset shift than right now.



Report Highlights in brief

Our Perception of Time has changed profoundly. Today, we are experiencing a desire for both flexible time and new uses of time. We also strive for disconnection and to slow down time since the high velocity of passing time makes us fear we never actually have enough of it. As hospitality has always been about giving people the best time possible, the shifting relationship to time has a direct impact on our industry, creating new expectations and perspectives. We have identified five key areas of insights related to time, sharing key takeaways as well as potential opportunities for hospitality moving forward. **Here is a first glimpse at the five insights outlined in the report.**

INSIGHT #1

Slowing Down and Time Out

The Response to the Increased Pace of Life

Life today moves at breakneck speed. Paradoxically, people's reaction to this acceleration is to pump the breaks. There is a growing movement to slow down and make time to focus on self and recharge, seek well-being, and decelerate the pace in all aspects of life, from the workplace to leisure time and travel.



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INSIGHT #2

Embracing the Generational Legacy.

Time to Share Experiences Across the Ages

People are living longer, with a greater number of generations coexisting today than ever before. From the workplace to hospitality, we are now faced with the opportunity and challenge of embracing and including multiple generations and their diverse needs, as well as a growing desire to embrace and celebrate the legacy of these generations.



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INSIGHT #3

Taking Time Together as Never Before

Seeking Connection, Community and Impact

Today, connection is key. People seek relationships — whether among peers in a modern take on private clubs, or with like-minded people purposefully contributing to the community for positive impact, or among colleagues to reinforce corporate culture and teamwork, or to live more authentically like and among locals.



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INSIGHT #4

Welcoming the Blended Living Movement

Hospitality for Flexible Work and Leisure Time

Life as we now know it is incredibly fluid. We move from work to leisure pursuits and back again. As a result, travelers today expect hotels to instantly respond and adapt to these shifts. This impacts how hotels conceive spaces, introduces new design solutions and uses for buildings, and leads to exciting new revenue streams and development opportunities.



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INSIGHT #5

Protecting the Future Now

Building the Sustainable Hospitality of Tomorrow

As a society, we are increasingly acknowledging climate change and our environmental impact. By transforming hospitality operations and integrating sustainable practices, the hospitality industry has also strongly embraced the role it can play in the sustainable transformation to make a difference and as a caretaker of the planet for the generations to come. This includes eco-minded construction, renovations, and integrating local communities and ecosystems. The hospitality industry has made strides, and the journey toward sustainable operations for long-term positive impact continues.



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The Perception of Time is Changing

The way we think about and experience time is changing significantly.

An Urgent Need to Control the Whirlwind Speed of Time

Time has taken a leading position in the global consciousness. A 2023 Ipsos Global Trends Research on Human Behavior notes 73% of respondents wish they could slow down the pace of their life.⁽¹⁾ We perceive time is accelerating and therefore feel the need to slow down, disconnect, or even completely remove ourselves from the time conundrum.

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Philosopher and Sociologist Hartmut Rosa believes the history of modernity is simultaneously the history of accelerating change. According to Rosa, the time-saving nature of technological progress actually leads to a shortage as opposed to a gain in time. The sheer multitude of possibilities everywhere means a person can no longer exhaust them over the course of their lifetime. *“It’s as if there were a correlation between the time we save and the sensation of never having enough of it. The problem is that since we can produce more quickly, we produce more. We are thus destroying our capacity to appropriate the world, to be moved, and to develop resilience,”* Rosa notes⁽²⁾.

This acceleration of life has led to burnout, anxiety, and other mental health challenges emblematic of present day. The result is a desperate hunger for more mindfulness and focus on the here and now. Our current “doing” viewpoint — where even rest and leisure time incorporates performance, self-improvement, and productivity — needs to be replaced by being and feeling instead.

The Perfect Blend of Work and Leisure Time

How we sort our individual time has become extremely flexible. “Work” and “leisure” periods are more fluid, distinguishable lines now blurred. This evolving approach to the business/leisure schedule offers incredible adaptability, with allocation varying in relation to work, play, family, or solo experiences.

“Work-life blending is the key to happiness,” human capital management consultant China Gorman noted in Inc. Magazine. Ms. Gorman further clarifies that while previous generations were willing to sacrifice their health and mental well-being to get ahead, Generation Z seeks “whole life” success — healthy bodies, good relationships, and fulfilling work.⁽³⁾

So with the same 24 hours available each day, we are attempting to identify the best ways to fluidly blend work and leisure time, albeit according to our own individual preferences.

Technology: A Double-Edged Sword

Technology plays a key role in how we manage our days. Time is, quite often, optimized by technology, enabling us to execute tasks quickly and efficiently so we can focus on more meaningful, inter-human, and inspiring activities. The technology at our disposal, however, also sets expectations for greater immediacy and the ability to manage a larger volume of demands. It makes people available 24/7 — essentially at any time — and smartphones and laptop computers enable us to connect anywhere. Therefore, while technology has expedited the way in which we respond to requests, it has also created robust demand for us to accomplish more in less time.

We Now Experience Multiple Chapters in One Lifetime

The concept of a lifetime has changed. It is expanding and becoming richer and more complex. We live longer, co-exist with multiple generations, and will experience multiple chapters over our growing number of years on the planet. J.F. Simonin, philosopher and President of the Long Time Institute believes “A [person] who is now around 60 years old has lived in three different worlds.”⁽⁴⁾ As such, people are encountering major shifts in their lifespan as they achieve their goals earlier. With greater longevity, we adopt a fluid mentality to our existence and may pursue a different career, adopt new goals, or even have

multiple marriages and families as we age. We now have more time than ever before, and want to live it to the fullest.

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Is Time Running out for Future Generations on our Planet?

As a society, we have become increasingly aware of how our time on this planet will negatively affect future generations. Climate change is here and we are heading toward a potentially serious situation if we do not alter our resource consumption. According to the World Wildlife Foundation⁽⁵⁾, “our climate is changing around us faster than predicted. From more frequent and extreme storms to unprecedented heatwaves, we’re feeling the impacts of human-caused global warming.”

Conclusion

The New Quality Of Time focuses a spotlight on our society’s evolving perception and experience of time — and, more importantly, how this impacts the hospitality industry, and the needs and priorities of our clients

And other stakeholders. As our sector centers upon places where people spend time for a variety of purposes, this report takes a deeper dive into how shifting mindsets around time impact our industry, both now and moving forward — from market potential, guest touchpoints, and Talent, to facilities, operations, and design — and shares the wealth of opportunities and business potential which lie ahead in our industry.

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Slowing Down and Time Out

The Response to the Increased Pace of Life

Life today moves at breakneck speed. It fast-tracks our ability to execute tasks and also creates an expectation for greater efficiency, immediacy, and to accomplish more in less time. Paradoxically, one of our reactions to this acceleration is to pump the breaks. People desperately want to catch their breath, engage in “me” time, take a break, recharge, and essentially slow the pace in all aspects of their lives from the workplace to home, leisure time, and travels as well as exploring wellness options to capture lost energy and focus. We see this trend come to life in three key areas which are related to hospitality:

**The Pursuit of Well-being • The New Workplace Expectations •
The Slow Travel Mindset**

#1

Self-care

Disconnect

Wellness

Slow Travel

Well-being at Work

Recharge

The Pursuit of Well-being



| The race is on — to slow down

As a society, we have spent years racing to keep up — with our careers, personal relationships, children, health, finances, and life in general. People are anxious to press the pause button for a time out — or even to completely disconnect. And now a bigger priority is emerging: the desire to discover who we are or can become outside of the daily grind. We want more out of our lives, seek greater enjoyment from each moment, and are demanding “me” time in order to feel better mentally, physically, and emotionally. A 2023 American Express Travel Global Travel Trends Report notes 73% of consumers are planning vacations to better their mental, physical, and emotional health.⁽¹⁾ These key findings shed significant light on the role hospitality will play in helping guests maximize their vacation/travel time to fulfill these new aspirations.

| The explosive growth of wellness

An integral component of this “me time” is a focus on mental, physical, and emotional well-being. In fact, wellness overall — and mental health more

specifically — have never been a greater part of our collective consciousness than right now. We are seeing the wellness market expand exponentially, from \$4.9 trillion in 2019 to \$5.6 trillion in 2022 according to The Global Wellness Institute.⁽²⁾ People are taking a holistic approach to their health, becoming more aware of the impacts from a variety of factors in life, and recognizing the growing need to take a break from their daily routines. A high percentage of people — as much as 67% — prioritize rest and recharging — which can translate into travel and vacation.⁽³⁾ This means hospitality companies must consider how to cater to this expanding consumer behavior if they do not want to miss out on a growing market.

| The rush to sleep

All eyes are now on sleep. People don’t seem to get enough of it, nor is the quality of sleep as good as it can be. Scientific evidence overwhelmingly shows the importance of sleep to overall health and well-being — not getting enough can increase the risk of heart disease, diabetes, stroke, cancer, and many other illnesses as well as frequent mental distress. What better place to address these concerns than at a hotel? We are seeing a new and growing focus on the quality of sleep at hotels, with everything from Sleep Concierges to packages featuring amenities focused on sleep quality. Accor’s Sofitel brand has been a pioneer in this area with its unique MyBed™

experience — the epitome of comfort which revolutionized the hospitality market when created in 2003, and recently conducting a scientific study to minimize the notorious “first night effect,” which happens when people sleep away from home. Guided by this research, Sofitel is deploying The Art of Sleep, new experience rituals across its hotels to help guests fall asleep quicker, including among others, bespoke treatment protocols, relaxing playlists, and precise lighting and temperature adjustments.

| Perhaps it’s time to just disconnect

Burnout is real. In our digitally connected society, we seldom, if ever, have a chance to disconnect. Oliver Patrick, Clinical Director of Pillar Wellbeing (a wellness philosophy centered upon preventative health and personal optimization) at Raffles London at The OWO, notes, “*We now have a philosophy based upon the premise that my environment works against me by keeping me in a room with disordered light, by keeping me tuned into 24-hour news, by keeping me addicted to dopamine rewarding technologies, by disengaging real connection, growth, and the things we know make us happy.*” As a result, people are increasingly seeking opportunities to get away from it all by traveling to incredibly remote destinations where WiFi and phone service may not be available or simply breaking with routine to disconnect. It is important for hospitality to become a haven for guests who may not always want to be connected 24/7.



The meditation solution to slowing down

Sometimes being in solitude is more powerful than anything else. Meditation is growing in popularity — so much that we are seeing movements like “The Big Quiet,”⁽⁴⁾ where thousands of people gathered for moments of quiet, connection, and music at iconic places around the world. Hotels can also be a solution to escaping the regular routine. Providing people with access to meditation classes at a resort spa or wellness facility — when someone actually has the time to participate — is key. Ironically, technology can also assist people with blocking out the world via guided meditations on phone apps. Alternatively, just being alone in a hotel room creates the possibility to try

something different, become still, and turn one’s focus inward. Oliver Patrick believes hotels serve an important function in this endeavor. *“Hospitality is experience, it’s entertainment, it’s a service industry, but I think it can do much more than that. I think it’s a huge circuit breaker and a utility to resist the world.”* And Patrick’s work with meditation offerings via Pillar Wellbeing at Raffles London at The OWO is one such example of how this can be achieved.

How The Purist revolutionizes the pursuit of well-being

As our society seeks more opportunities for self-embrace and mindful pacing, Accor’s The Purist Retreat & Spa concept revolutionizes the well-being journey. It offers an innovative, holistic approach to wellness, inviting guests to discover the profound joy of complete harmony through four core pillars: Care to nurture, Movement to rejuvenate, Nutrition to balance, and Sleep to recharge. Successfully launched a few months ago at Cures Marines Hotel & Spa Trouville – MGallery Collection, France, The Purist will expand to key locations over the next few years. This concept perfectly aligns with the unique essence of each destination, and is designed to ensure exceptional returns in guest satisfaction and revenue growth through a sustainable approach.

Living longer by slowing — or turning back — time

According to Future 100 report (VML), 74% of people globally say they like the idea of living to be a healthy centenarian.⁽⁵⁾ With an aging population, the innate desire to foster well-being focuses on longevity — which is of particular interest among the elite community of Silicon Valley tech innovators who want to “hack” human lifespan limitations. Biohacking, in fact, is big business.⁽⁶⁾ Longevity resorts may indeed be one way to nurture that possibility.

High net worth individuals with nearly limitless discretionary income have become a prime target for the luxury travel sector. These consumers are willing to invest money to gain the upper hand on aging (the global medical spa market is projected to reach US\$49 billion by 2030⁽⁷⁾) and this search for the “fountain of youth” is being addressed through a variety of techniques which offer opportunities to integrate longevity into wellness offerings in spas, including:

- Mixing ancient and modern practices to slow down time and aging.
- Utilizing tech and data through life-hacking retreats, bio-hacking, DNA hacking, etc.
- Implementing emerging treatments including cryotherapy, thermal body mapping, neuro-nutrition plans, and emotional strength training.

Hospitality Opportunities

- **Expand individual well-being offerings**
Add enriched mental and emotional wellness retreats, mindfulness, breathing, and meditation techniques to disconnect.
- **Address the need for better sleep**
Create offerings with lighting, scent, sound, and food and drink to calm and relax.
- **Offer enhanced in-room features**
Integrate active wellness elements including circadian lighting, specialized temperature controls, air filtration, and more.
- **Embrace technology**
Create moments of pause using touch-haptic which encompasses touch, light therapy and guided meditation to disconnect and slow down.
- **Design for solo travel**
More people traveling for “me” time, as well as those staying longer for work and play will impact the accommodation style needed as they utilize their room differently.
- **Recognize the ROI**
Adding well-being features adds value, attracts clients and contributes to their satisfaction, helps the upsell, and provides greater revenue for investment.

The New Workplace Expectations



Well-being is no longer sacrificed at the altar of ambition

The desire for individuals to slow down time is happening holistically — not just for personal time, but in the workplace as well. While a good number of people remain committed to their jobs and seek advancement, many have come to the realization work is not the be all and end all of life. There is a growing concern about rigorous business schedules impacting health, and people are actively seeking ways to slow down at work and take a moment to breathe both in their own rhythms as well as collectively during time and interactions with others. In fact, a study conducted by Novotel of 2,000 adults in the UK found just three in 10 people are satisfied with their current work-life balance.⁽⁹⁾

44%

of global workers said the workplace causes them much stress.⁽⁸⁾

Talent now expects employers to accommodate their need for better balance

This slowing down trend is becoming quite significant in the workplace as younger workers — considerably more than previous

generations — expect and demand their company to take care of them, enable them to master their own time and interactions, and have the space to take a breath every now and again. Tangibly impactful benefits are at the top of Millennials' desires in a job, and these benefits must support a healthy work-life balance. In fact, more than 80% say they seriously consider how a position will affect their work-life balance.⁽¹⁰⁾ Steven Daines, Chief Talent & Culture Officer at Accor notes, *"People innately want to be happy at work. It is where they spend the majority of their time each day. Talent therefore has an expectation for employers to be tuned into their mental health and well-being and also be willing to provide support when they are struggling."*

As one way to meet this request, a growing number of companies including PayPal, Meta, and Adobe are offering early sabbaticals⁽¹¹⁾ — a perk usually reserved for employees with a decade of service or more. In the period following COVID in 2022, Salesforce had also set out to adapt office culture and reimagine how to connect by introducing during that time, Trailblazer Ranch, a 75-acre facility functioning as a gathering place for employees to participate in tactile experiences (nature walks, yoga, gardening, cooking) outside of the confines of an office.⁽¹²⁾ As an employer in hospitality, addressing these growing expectations provides an effective opportunity to attract and retain Talent.



Making meetings more wellness focused

Wellness has emerged as a key consideration in the meetings and events industry and can translate into capturing business opportunities through the introduction of new wellness-focused amenities, spaces, cuisine, activities, and more.

Sophie Hulgard, Chief Sales Officer, Accor, points out, *“Attendees are increasingly seeking experiences which prioritize their physical and mental well-being alongside the traditional objectives of networking, knowledge sharing, and productivity. Incorporating wellness elements not only enhances attendee satisfaction but also contributes to improved engagement, productivity, and overall event outcomes.”*

As an example of this in action, Accor’s Emlyn Brown, Global Senior Vice President - Wellbeing, Luxury & Lifestyle, Accor, reported the Group has been building wellness lounges into all of its big meeting spaces at ITB, IHIF, GME, Virtuoso, and IMEX. *“We focused on bringing people away from the hustle and bustle of the event space to give them moments of pause. Also our MICE events focus is on team building with more slowness, gaps for spontaneous meetings with individuals, fitness, and movement.”*

Even the most performance-focused brands take the wellness trend into

account for their meetings and events propositions. Pullman Hotels & Resorts, for example, which champions “soft productivity” — a fluid and compassionate approach to work and life — will be incorporating this philosophy into their offerings for innovative meetings and events for companies. This is just one of a variety of examples of opportunities to make meetings more wellness focused which the hospitality industry can explore going forward.

Wellness has emerged as a key consideration in the meetings and events industry and can translate into capturing business opportunities through the introduction of new wellness-focused amenities and more.

Hospitality Opportunities

→ Integrate well-being into meeting and event propositions

Incorporate well-being throughout attendee touchpoints: sleep offerings, specialized tech apps (like wellness apps, wearable devices and virtual wellness platforms), and healthy food focus (providing nutritious meal options, incorporating local organic ingredients, and catering to dietary requests).

→ Introduce active meetings

Incorporating physical activity breaks, such as yoga sessions, walking meetings, or team building exercises (such as outdoor adventures or fitness challenges), encourages movement, boosts energy levels, and enhances networking opportunities.

→ Propose wellness lounges

Dedicated spaces within event venues that offer relaxation areas, massage stations, healthy refreshments, and interactive wellness activities provide attendees with opportunities to rejuvenate and recharge.

→ Foster a culture of employee well-being

Consider phone apps for employees to manage their own pace, enriching human resources policies for greater flexibility, and breakout spaces for true disconnection including places for silent time.

The Slow Travel Mindset



Appreciating the moments along the way

Just as we have embraced the concept of “slow food,” the philosophy of “slow travel” has entered the global lexicon. Referencing the old adage of “life’s a marathon, not a sprint,” travelers have a new outlook. Instead of simply racing to a destination, the focus has shifted to appreciating the moments along the way as much as the final destination. We are witnessing a strong new desire to embrace experiences moment by moment, watch the world go by, take time, and live our personal natural rhythms versus the hurried pace of life, in particular, when traveling. For hospitality, we are seeing guests making stops along the way on their journey instead of only at the final destination, as well as staying longer once they finally do arrive versus rushing back home after a long weekend or a seven-day stay.

The focus has shifted to appreciating the moments along the way.

Mercure Discover Local: The bucket list edition

Perhaps the old adage of taking time to “stop and smell the roses” should be adapted to be “stop and savor the local cuisine.” An essential way to slowly savor a destination is through the regional food. Mercure hotels are deeply committed to connecting guests with the local destination in many ways, including through food, and it does so with a Bucket List, which comprises 50 handpicked food and drink experiences from around the globe, each serving as a gateway to its destination. The Bucket List ⁽¹³⁾ provides hands-on learning opportunities which enable travelers to dig deep into the local culture by interacting with chefs, artisans, and farmers. For instance, in Australia, Mercure Kangaroo Island Lodge recommends Kangaroo Island’s Emu Bay Lavender farm for a sensory adventure with lavender-infused treats.

The journey IS the experience

There is a renaissance in luxury train and cruise travel as people have nostalgic appreciation for the slower and once very popular modes of transportation. Here, the journey is the primary focus as it is an opportunity to decelerate the pace of a

vacation and luxuriate in a fabulous setting along the way. It is interesting to note here social media giant Pinterest predicted train travel would be one of the biggest trends of 2023 as videos and photos of people trying to achieve “train aesthetics” were racking up millions of views and #TrainTravel on TikTok reached 155 million views last summer.⁽¹⁴⁾ Perhaps no better example of the momentum in simply enjoying the journey is the legendary Orient Express.

The company has always been synonymous with luxury and a slower pace of travel, and its newest offering, *La Dolce Vita* Orient Express, will enable passengers to discover Italy in-depth with leisurely itineraries to completely immerse themselves in the destination. The focus is not on traveling far, but instead enjoying every second of a unique luxury hospitality experience along the way. Orient Express is also bringing back the golden age of cruising with the upcoming *Silenseas*, the world’s largest sailing ship, which will debut in 2026.

Slow travel is sustainable travel

Part of the move to slow travel is also intertwined with the growing focus on sustainable travel. Consumers are becoming increasingly more aware of the effects of their travel on the planet and are abandoning planes in favor of other eco-responsible modes of transportation (train, car, bicycle, etc.) both *en route* and while at their destination. This behavior

is becoming mainstream in China, where 40% of consumers have avoided flying for eco reasons.⁽¹⁵⁾ It opens up opportunities to promote and reward slow and sustainable travel as well as capture new audiences. For Accor’s Chief Sustainability Officer Brune Poirson, *“The social and environmental transition, in a global group like Accor, is instrumental. At a time when the world of tomorrow has to be created, the hospitality industry — which has always fueled imagination and experience — must contribute to designing new storytelling around more sustainable ways of traveling. As an industry, we need to develop conscious exploration, moving away from standardized experiences to get an intimate look and discover the richness of a destination as well as promoting destinations closer to home and new travel experiences.”*

Soft mobility is one key area of growing interest where guests can explore under their own steam via walking tours, cycling, kayaks, public transportation, etc., to be in the midst of a place and not viewing it from behind the windows of a tour bus which enables observation rather than immersion.

A few destinations and hotels are already stepping up to encourage travelers to enjoy slow and sustainable travel. Both the Novotel Rio De Janeiro Leme in Brazil and the Mövenpick Resort Waverly Phu Quoc in Vietnam offer cycle rental for guests to explore the local area at a slow and sustainable pace.

Additionally, Normandy is the first region in France to propose a 10 to 50% reduction on certain local activities (entrance fees to beach clubs, museums, castles, and more) for tourists who can show proof they arrived by bicycle or train. And Ennismore’s The Hoxton encourages sustainable travel by offering The Good Rate, a £20/20€ saving off their stay for those planning a multi-hotel trip when traveling between its properties in Europe via train. Slow travel also opens up new target markets — feeder cities which may have been previously overlooked — with potential guests closer to the property who will travel inbound via train or car versus airplane.

32%

of global consumers will have chosen — by 2030 — an alternative means of transport to avoid flying for environmental reasons, up from 25% in 2023.⁽¹⁴⁾

Hospitality Opportunities

- **Show how the journey is the experience**
Integrate the journey to the property to make it an overall part of the experience of the destination, advising on what to see along the way, where to eat, and other helpful tips.
- **Create new revenue streams**
Design stopover and staycation packages, special rates for longer stays, services for those who seek a different pace, and amenities for those who choose alternative methods of travel (e.g., secure bike parking).
- **Promote destinations and hotels that may have new or renewed appeal thanks to slow travel**
There are new opportunities for properties which are close to cruise ports, train stations, in the countryside along popular bike routes or away from it all, etc. which enable slow travel experiences.
- **Partner with hotels, cruise lines, and bike tour companies**
Solicit new partners to offer overnight packages or pre- or post-travel stays for their customers.
- **Raise awareness and encourage guests to travel differently**
Provide special offers, savings, amenities which are geared for these new travel attitudes as well as highlight eco-responsible transportation options.

Embracing the Generational Legacy

Time to Share Experiences Across the Ages

Time is perhaps never more evident than when considering our lifespan. Since we now live longer, a greater number of generations coexist today than ever before. There is an innate wisdom and experience which comes from having spent more time alive, but also added challenges to overcome as we strive to ensure a measure of inclusiveness and solace for this spectrum of generations to live, work, play, and travel together. There is a new trend evolving which is a greater desire to embrace, encourage, and celebrate the legacy of multiple generations being together — particularly as it relates to travel. This opens up an incredible opportunity for the hospitality industry to create spaces, packages, services, amenities, and programs designed to fulfill the needs of multiple generations.

The Workplace Intergenerational Balance • Broadening Horizons in Family Travel • The Staying Power of Legacy

#2

Multigenerational

Legacy

Inclusive

Bonding

Mentorship

Cultural Heritage



● The Workplace

Intergenerational Balance



The older workforce is already here

According to the American Association of Retired Persons (AARP), every day in the US, 10,000 people turn 65. And the number of older adults will more than double over the next several decades to top 88 million people, representing over 20% of the population by 2050. Many older employees no longer feel welcome or appreciated, and at the same time, we are seeing a phenomenon of “unretirement,” where those 65+ are actually returning to the workforce. Some have no choice and need to work to maintain financial stability, while others come back to keep themselves active, for social interaction and because they still enjoy working and sharing their knowledge and talents.

A diverse workforce brings better returns

With this wide disparity in workforce ages — anywhere from 18 to 80+ years of age — there is a distinct benefit to embracing an older workforce and positively blending both young and old Talent together. A recent Fortune Magazine report⁽¹⁾ on aging in the workplace noted “as the pool of

older workers grows, so does the evidence their presence on multigenerational teams can boost a company’s bottom line, and foster innovation. In the war for Talent, employers must implement novel ways to integrate and engage both longtime and new cohorts of experienced workers.” Research shows diverse companies earn 2.5 times higher cash flow per employee and inclusive teams are over 35% more productive. It is therefore key for success as a greater number of generations work side by side to identify the best ways to embrace and encourage age diversity in the workplace.

One company which has made great strides is the CVS drugstore chain, which integrated a “Talent Is Ageless” program⁽²⁾ under the philosophy that new ideas have no age limit and created a Workforce Initiatives team to explore strategies to attract and retain mature workers. The hospitality industry has always had a diverse workforce in terms of age — with a cadre of long-term employees working alongside new hires in many departments — and now we see a significant opening for hospitality to make the older workforce feel welcome by creating a culture which embraces and encourages diversity, while at the same time reaping the benefits of better performance.

Inclusive teams are over 35% more productive.



| Redefining our work life

We have already experienced a major shift in how people work. Over the past few decades, there has been much less employer loyalty where an individual would remain at a single company throughout their entire career. But times have changed. Now Talent jumps from organization to organization more frequently to pursue better opportunities and higher incomes.

And as Talent is living longer, they are also working for an extended period of time beyond traditional norms. They may actually have multiple careers in their lifetime and zig zag along an employment path which best suits their lifestyle — including returning to the workforce as empty nesters or after retirement as previously noted.

This noticeable shift is quite apparent in the hospitality industry as well. It has been difficult to attract and retain labor and, at the same time, we are witnessing a need for jobs to be more flexible with regard to schedules to accommodate this new employment mindset. These changes are driving a need to create new models for the workforce — particularly within our industry — as the Talent approach to employment is less linear. For example, valuing the incredible experience older employees bring to hospitality, Accor in Singapore has created special employment opportunities for the mature workforce who want to remain active, have part-time or flexible hours, or seek a more personalized

work/life balance. This is in line with Accor's global Employee Value Proposition (EVP) — "Hospitality is a Work of Heart" — which promotes four core pillars, one of which centers upon "Grow & Create Your Path," to offer Talent greater flexibility to meet different aspirations and work as they prefer, thus addressing this significant shift in Talent's desire to redefine their work life.

| Reaping the benefits of experience

Any hotelier knows the majority of long-term employees have hospitality service down to a science and are always revered by frequent guests. So what if we were to find a way to embrace these legacy workers, develop more flexible hours and positions for them according to their needs, help them train and mentor younger Talent, and at the same time showcase their knowledge to both other Talent and guests?

Looking at another sector, a shining example of how one company is approaching the best way to share knowledge of long-term employees is the BMW Senior Experts Program.⁽³⁾ Recognizing the high-level expertise, in-depth process knowledge, and industry connections of long-term and senior employees, BMW has endeavored to stop the loss of know-how in retiring employees by offering them short-term assignments and projects. Similar programs can also be suited to hospitality to integrate older Talent into the industry either in training

and mentoring positions with younger Talent or to start a new career.

“ Accor welcomes everyone, whether they are hotel management graduates eager to start their careers or more senior Talent with no prior sector experience or perhaps have been in the industry for decades, yet want to redefine their position to better match their lifestyle and physical capability. A key element in working with more experienced Talent is to offer a certain level of flexibility in how we craft our job conditions such as shorter shifts, opportunities to train and mentor younger employees, as well as duties which may be less strenuous. We truly value the contribution of a diverse group of Talent as they each have something unique to bring to the table and make our hospitality offerings for guests richer and more experiential. Accor's Employee Value Proposition — "Hospitality is a Work of Heart" — recognizes the unique value of diversity to "Be All You Are," encompassing intergenerational diversity.

— STEVEN DAINES
Chief Talent & Culture Officer, Accor

— Hospitality Opportunities

- **Introduce more flexibility in job positions**
When possible, think about ways to offer positions where non-traditional schedules are available to accommodate older workers who want to reduce hours or return to work on a more limited basis.
- **Create mentoring programs**
Pair younger and older workers to effectively facilitate knowledge transfer, ensure process continuity, enhance training, and enrich job performance.
- **Expand your labor pool**
Hiring mature workers provides greater consistency and a more loyal employee at a time when the labor market is so tight.
- **Incorporate storytelling**
Leverage the personal experience and history of legacy workers by incorporating storytelling about the hotel and local area into the guest experience from the viewpoint of the Talent.



Bridging the Divide

Helping Older Talent Thrive in the Workplace



Rachele Focardi, Founder and CEO of XYZ@Work shared some key advice on how to welcome older Talent back into the workforce and streamline the cooperation with younger generations.

What are your three tips for considering and welcoming people 60+ in the workplace?

RF Implement age-inclusive policies like flexible working hours and phased retirement options to support the needs of older employees and promote their continued engagement.

Offer continuous learning opportunities and roles to leverage their strengths and ensure they feel valued and equipped to contribute effectively as many older employees want to reconnect with their sense of purpose.

Leverage the experience of older employees through mentoring programs and cross-generational projects to encourage intergenerational collaboration and enable them to pass down their legacy, learnings, and experience.

What value do older employees offer from a business perspective?

RF Their biggest contribution is as mentors and knowledge bearers. Older employees are loyal, experienced, knowledgeable, and industrious problem-solvers, and their

wealth of institutional knowledge and adaptable nature makes them invaluable assets — especially when paired with the energy and innovative spirit of younger generations. Older employees also bring strategic thinking, crisis management, conflict resolution, customer service, a deep understanding of industry trends, and can inspire purpose to both preserve organizational legacy and unite generations.

What issues are typically overlooked when dealing with a mature workforce?

RF There is usually a lack of cross-generational awareness. In fact, 68% find collaboration with different age groups challenging. This knowledge gap not only reinforces negative stereotypes and intergenerational conflicts, but also contributes to employees feeling undervalued and intimidated. Companies should implement cross-generational awareness sessions so that younger employees can understand the contexts that shaped older employees' perspectives and seek their expertise. In turn, older employees can learn about the contexts influencing younger employees' viewpoints.

What are the best ways to create positive team spirit and successful collaboration between different generations?

RF Encourage and value diverse perspectives with brainstorming sessions or suggestion boxes to source alternative ideas. Implementing strategies such as Two-Way Mentoring or “Duo Programs” pairs younger and experienced employees to exchange knowledge and skills. Forming Multigenerational Teams for project work leverages different strengths and perspectives, promoting collaboration and creativity. Organizing team-building activities as well as creating Employee Resource Groups also provides opportunities for employees to connect and foster stronger relationships by encouraging teamwork across different age groups, helping to break down barriers.

How do younger generation perceive the older workforce?

RF Younger employees unanimously express a strong desire to foster intergenerational collaboration and develop meaningful relationships with their

older counterparts. They actually highly regard older generations as possessing valuable traits such as loyalty, experience, knowledge, strong work ethic, dependability, and resourcefulness.

Remarkably, 97% of them emphasize the immense learning potential from older colleagues, spanning negotiation skills, networking, soft skills, navigating organizational politics, managing stakeholders, coping with pressure, overcoming challenges, nurturing offline relationships, and drawing insights from life experiences.

Younger employees, however, also often feel misunderstood and looked down upon by their older peers and believe that rigid hierarchical structures fail to fully harness their capabilities, leading to frustration and disengagement, and widening the gap as it often correlates to seniority. Thus, it becomes imperative to address these stereotypes and cultivate mutual empathy and understanding.

Broadening Horizons in Family Travel



A flourishing leisure travel segment: extended family is big business

There is simply no denying intergenerational family travel is a very important part of the leisure travel market today. With a greater number of generations co-existing currently, it is a natural evolution for extended families to want to travel and enjoy experiences together.

In fact, half of all consumers took a family trip in the last year and almost half say they have plans for a trip in the next 12 months. Moreover, more than half of parents surveyed said they are planning to travel with grandparents and children.⁽⁴⁾

From a business perspective, this segment cannot be ignored. It presents incredible growth and revenue opportunities for hospitality overall, as the average length of a US family vacation is 6.9 days and costs around \$1,200 per person for domestic trips.⁽⁵⁾ This growth in travel is also illustrative of a deeper trend extending beyond hospitality as well, with a number of organizations which foster intergenerational bonding through various programs.

68%

of multigenerational travelers want more bespoke offerings.

How can we best enhance multigenerational services and experiences?

When it comes to multigenerational travelers, it is definitely not a one-size-fits-all guest experience. One of the key elements in hosting multigenerational travelers is recognizing the varying needs of several generations traveling together. This audience is quick to report they are not finding an abundance of services, facilities, and experiences which properly satisfy their family's needs.

Research shows 68% of multigenerational travelers want more bespoke offerings from hospitality brands and express dissatisfaction at what is currently available.⁽⁶⁾ Additionally, more than two-thirds express significant difficulty in the planning process and report they will abandon brands which don't make trips seamless. This presents a significant opportunity for hotels to leverage the increased market potential of this audience by prioritizing all steps in the multigenerational travel experience, from pre-trip planning and booking to innovating offerings, experiences, and facilities on-property. How can this look?

It could be anything from more spacious and residential style villas to retrofitting existing accommodations with common spaces and a small kitchenette; adding outdoor spaces in moderate climates; and ensuring there are private dining rooms in the food and beverage outlets for families

Family-friendly offerings across the board

Mövenpick Hotels & Resorts excels in providing seamless family travel experiences, meticulously catering to multi-generational needs and ensuring that every stay is filled with unforgettable memories. From adventure-themed rooms and engaging kids' clubs to premium villas and extensive leisure facilities, Mövenpick aims to create the perfect backdrop for family connection. In Vietnam, Mövenpick Waverly Phu Quoc offers families the ultimate comfort with three-bedroom villas featuring a kitchenette, private pool, spacious terrace, sea view, and direct beach access. This idyllic setting ensures a memorable stay for every member of the family. For those seeking both relaxation and an active vacation, Mövenpick Resort & Spa Fruške Terme in Serbia is the perfect destination, that caters to all ages, with 12 pools featuring healing thermal water, mini golf, and tennis court.

to gather for their meals. Hotels could take this a step further by offering services such as health advisors and professionals who anticipate multigenerational family needs and wellness desires, technology to assist families in seamless planning, and curated multigenerational activities both on- and off-site.

Multigenerational travelers want to bond over shared experiences

Travel has always been a great connector. People who visit new places and experience intriguing cultures together become bonded in a significant way as a result. And now with family and intergenerational travel growing, this opportunity to share incredible new places and experiences is magnified. Interestingly enough, 54% of Millennials⁽⁷⁾ now choose to travel with their families to bond and create memories together — a desire which has increased future potential since their participation is voluntary and not imposed by older generations.

Families who share specific passions — golf or tennis, hobbies, books, movies, the arts, etc. — can indulge those interests with bespoke travel itineraries enabling them to bond in new and more meaningful ways.

We are now at a pivotal point where it behooves us as an industry to create impactful intergenerational bonding moments which appeal to this audience,

because it has become very clear the places that are successful in doing so, will have enormous staying power. Travel planning company Black Tomato truly has its finger on the pulse of this segment's needs by observing *"What starts as a passion point, evolves into something the whole family can commit to experiencing together in their travels, bonding them in a meaningful way."*

Put into action, Accor's ALL loyalty program brings members access to unforgettable experiences and events for meaningful moments with loved ones of all ages, around shared passion points of sports, entertainment and gastronomy.

Ennismore's Rixos Hotels brand has also embraced the multigenerational family market with a specific approach: *"Making The Whole Family Happy Is A Culture Here."* Central to this philosophy is their 'Rixy' kids club, which offers educational and entertainment activities, like playing musical instruments, painting, football, dancing, and cooking. Adults are also catered to with sophisticated entertainment options such as cabaret shows, circus performances, talk shows, and live concerts. This diverse range of activities ensures a memorable and fulfilling stay for all family members.

Hospitality Opportunities

→ Design multigenerational bonding packages

Incorporating elements and activities suitable for all ages such as culinary workshops drawing from local traditions, technology detox retreats which encourage outdoor adventures, etc.

→ Create "memory making" trips

Whether exploring genealogy or a particular cultural interest or sport, enable families to participate in activities which result in a tangible souvenir of some kind to take home with them.

→ Upsell larger accommodations

Intergenerational guests equate to more heads in beds and a greater requirement for space. Rather than working to accommodate everyone in standard guest rooms, add on villas and residences with upsell services like a private chef, nanny, and concierge to truly meet the needs of everyone.



The Staying Power of Legacy

The expression “everything old is new again” has stood the test of time, and hospitality is no exception. With its rich legacy to draw upon as inspiration for the experiences and offers of today and tomorrow, we offer a snapshot below as an example of five key spheres of our industry to illustrate the continued relevance of bridging the past, present, and future.

Brands

Hospitality industry legacy brands have a very significant attraction for consumers due to their prestige, authenticity, and enduring success — an appeal which shows no signs of waning anytime soon. Accor has 4 of the 7 heritage hospitality brands dating back more than a century: Orient Express, Raffles, Fairmont and Pullman.



#1

Talent

It is a very simple and powerful act to enrich a guest interaction by drawing on the wealth of experience of the people engaging with clients. As an example, when a nature guide with 60+ years of experience at a resort engages in riveting personal storytelling about encounters with wildlife in the woods, connecting with guests in a unique and memorable way.



#2

F&B

Certain age-old culinary techniques are finding new life today. Fermentation is being explored in new ways to offer innovative food and drink experiences such as Boochmania in San Francisco, which is a trendy temple to fermented food and drink. Additionally, Stanford University has even conducted a five-week course entitled “From Kombucha to Kimchi: A Hands-On Journey into the World of Fermentation.”



#3

Destination

Destinations building on their legacy while reinventing themselves to appeal to a new generation of travelers. NPR notes Singapore is considered “the 20th century’s most successful development story,” evolving into one of the most influential leaders of the present in terms of international appeal based on its rich history, cultural diversity, economic wealth, and pioneering green urban planning.⁽⁸⁾



#4

Construction

Today’s strong desire to be more sustainable with building materials and energy usage is propelling a renewed interest in utilizing ancient materials and techniques like rammed earth or “pisé,” which dates back thousands of years and is popular again due to its sustainability, durability, and natural insulation properties. Materials like these can be considered as inspiration for building.



#5

Taking Time Together as Never Before

Seeking Connection, Community, and Impact

We are witnessing a discernable shift in how people spend their time. People are expressing — as well as acting upon — a desire to truly connect with one another. They yearn to be part of a local community, feel connected to destinations, and embrace collective energy toward shared purposes, such as wellness, relaxation, activism, or working toward the greater good. For the hospitality industry, this means guests now view hotels, restaurants, event venues, etc. through a new lens, seeking connections in various ways. Whether around exclusivity or for a shared purpose to help a cause, people today have a distinct need to connect and relate to one another.

**The New Private Socialization • Coming Together to Do Good •
The Connection to Local Just Got Deeper**

#3

Connection

Community

Socialization

Impact

We-time

Local

The New Private Socialization



According to Maslow's Hierarchy of Needs, after the basic physiological needs of food, water, shelter, safety, and security, the next biggest requirement is for love and belonging. That sense of connection and socialization between humans is incredibly important, and in our current culture we are witnessing this in our leisure time as well as at work, where we aim to spend time with like-minded individuals and transform solitary practices into social ones which enable us to connect and enjoy the company of others.

The move toward private social clubs

Social clubs are big business and are having a renaissance. Recent data shows roughly 73%⁽¹⁾ of members use clubs to connect with friends, and the global private social club market is poised to reach an astounding \$35.8 billion by 2027.⁽²⁾ The big draws of social clubs are twofold: the exclusivity factor of being part of a restricted club as well as the fact the clubs bring together like-minded individuals.

Additionally, many social clubs are refining their membership focus in order to set

themselves apart according to interest and purpose – for example, Remedy Social is billed as the world's first social wellness club which focuses on enhancing health and social life through human connection and self-care⁽³⁾, or Orange Parnasse⁽⁴⁾, a private club focused on those interested in digital and innovation in Paris, France.

Ennismore is behind the membership-based brand Working From_, a co-working concept, originally inspired by the comfy sofas at The Hoxton, which draws together like-minded entrepreneurs to a place to work that feels like home, offering among others daily wellness classes, a help-yourself pantry, or even special rates for The Hoxton rooms, restaurants and bars.

Connecting “me” time with “we” time for well-being

As a society we want to take better control of our well-being. While we focus on our own individual well-being, we also want to pursue wellness collectively. This is even the biggest trend right now according to recent findings from the Global Wellness Summit: the development of new spaces and experiences which bring people together in real life — creatively and with intention — where social connection is the burning center of the concept.⁽⁵⁾ Social wellness clubs with different vibes and price-points are growing, where group bonding comes first and the wellness experiences serve as social icebreakers. As Accor's Emlyn Brown notes, “Younger

generations used to meet their dates in the pub. Now they prefer to work out together in the gym.” We are also seeing a return to ancient wellness practices: the urban bathhouse. These bathing spaces — no matter how you call them from a Roman thermae and Japanese sento to Turkish hammam or Russian banya — operate on a similar principle: providing a communal space for social interaction, cleanliness, and healing.⁽⁶⁾ And these social wellness concepts are also growing in the hospitality space as well. An exciting new addition to this space is at Fairmont Chateau Lake Louise in Canada, which will open its Icon social bathhouse in 2025. Fairmont Manchester in the UK has a 2,300 square-meter membership wellness club also launching in 2025.

“Hoteliers have to understand there's nothing more social than fitness. When you talk about socialization of lobbies, socialization of restaurants, and socialization of bars, you should think first of wellness areas.

— EMLYN BROWN
Global Senior Vice President - WellBeing,
Luxury & Lifestyle, Accor



| Group functions go social

Perhaps no area has recognized the need for coming back together than the workplace.

Despite the rise of digital and the power and acceleration of technology for remote work and meetings, human connections are still essential for business. Digital is powerful, but face-to-face is valuable. The coming years will see an increasing number of companies considering how they can forge deeper connections and cement relationships in their approach to meetings and group functions. In addition to quantifiable ROI (return on investment), such as closing deals, companies are also now seeking positive ROX (return on experience) to reinforce a sense of belonging and deliver valuable experiences. As an example, PWC in Australia created a festival-like incentive program to increase the sense of belonging. “The Outside” was held over five weeks with 2,700 people attending and gaining skills to be future leaders in a setting that was an immersive and highly experiential learning occasion.

Herein lies great opportunity for the meetings and events business within hospitality as meeting planners are increasingly booking more meetings which incorporate non-business sessions into their agendas to drive collaboration and company culture, as well as create community and connection including social events (painting classes and cooking

lessons) to philanthropic activities (working together within the local community for a cause). The C2 collaboration with Pullman Paris Montparnasse in France to create fully immersive meetings and events has become a model for this type of gathering, offering a space to inspire the interchange of knowledge and ideas.

Additionally, Pullman has launched Pullman Happenings which are experiential events including thought-provoking and cultural talks and entertainment, to further deliver these unique experiences.

Meeting planners are increasingly booking more meetings which incorporate non-business sessions [...] to create community.

— Hospitality Opportunities

- **Expand or repurpose facilities to offer private social spaces**
These can be marketed to residences, mixed-use buildings, and even offices who want to offer their residents and employees private access to exclusive social spaces.
- **Enrich offerings with a private membership option**
Boost pricing, revenue, and allure through the exclusivity, customization, and privacy of a membership option for both locals and guests alike for regular hotel facilities (spa, entertainment, food and beverage, etc.).
- **Focus on connected experiences**
From enriching meeting offerings for planners to engaging solo travelers, create socialization and bonding experiences like cooking lessons, cocktail demonstrations, and other activities where they can join a group and connect to others.
- **Capitalize on the social trend in wellness**
Revisit wellness offerings to create communal experiences in terms of group classes as well as other experiential elements where like-minded individuals can bond over their shared desire to work on wellness. Make socialization a priority when (re)designing spa and fitness areas.

Coming Together to Do Good



A movement has emerged known as “impact travel”: the positive effect people can have on the local community, environment, and culture when visiting a destination. According to the American Express Travel global trend report, 78% of travelers want to have a positive impact on the community they are visiting⁽⁷⁾ and for 81% this means making sure the money they spend while traveling goes back to the local community.⁽⁸⁾

For the travel and hospitality industry, this focus of impact travel relies on social-led instead of product-led experiences. People want their explorations around the world to forge deeper human connections, and make a positive and regenerative impact on the local communities and environment they visit. Hotels which can foster connections for guests to make a difference in the local community will definitely have an edge as impact travelers consider where to stay. It also applies to the local area where residents want to gather at places which support initiatives for community improvements.

Supporting social change through music

ibis RockCorps is a unique initiative, using music as a catalyst for social change by bringing together people from all walks of life to work hand-in-hand toward a more united and supportive society. For the 2024 edition, people were invited to give four hours of their time to a civic project and volunteers were then given a ticket to attend the RockCorps France concert which featured performances by leading rap stars.

“*Environmental and social challenges are inseparable — they are two sides of the same coin. I am convinced that there can be no valid solutions to environmental challenges without a strong social response, which is why at Accor, people and nature are the driving forces behind all of our actions — both in operations and at every stage of our value chain. Our team members are the lifeblood of Accor and enable us to progress and become better. One example is Accor’s ‘Heartists® for Good,’ a unique initiative in our French corporate headquarters encouraging our employees to engage by allocating one day per year for volunteer activities during their working hours for a cause dear to their heart. All of this contributes to why Accor is at the forefront of the transformation of the hotel industry, working to make an active contribution to the environment and society.*

— BRUNE POIRSON
Chief Sustainability Officer, Accor

78%

of travelers want to have a positive impact on the community they are visiting.

Finding connection through shared purpose

Many businesses are now operating with a model for the business to bring people together — both as Talent and patrons — with the shared purpose of doing good for the local community in some way.

This community-focused priority is a very enticing way to create connection and is being realized in a number of ways.

The Starbucks’ Community Stores⁽⁹⁾ is a model for disadvantaged neighborhoods in a number of cities.⁽¹⁰⁾ They are designed to embrace the unique culture of each area, characterize the needs of each neighborhood, and are also dedicated to working with organizations which have a proven track record of creating progress for these types of communities. These types of spaces which contribute to the revitalization of local neighborhoods and economies serve to anchor entrepreneurial communities and influence the urban economic and physical landscape.⁽¹¹⁾ In the hospitality space, Fairmont Mount Kenya has created a very unique culture committed to the local community.

With a wide variety of initiatives, some of its give-back programs include free medical checks for underprivileged individuals, grants of land to local women, and tree planting to beautify the community. In a similar vein, the Mövenpick Resort Petra in Jordan, designed a 3,000 square-meter garden for the local community to use. It is also managed by the community thereby providing employment.

Travel which does a destination good

We now exist at a time when people are considering vacations to destinations which involve a more proactive and intentional journey — what many call “regenerative travel.” According to the World Travel & Tourism Council, regenerative travel goes beyond helping to conserve a destination and instead, inspires visitors to impact the destination positively.⁽¹²⁾

The focus is on social-led rather than product-led experiences designed to forge deeper human connections, give back to local communities, and consider the environmental and social impact of their travels. In a survey by Economist Impact⁽¹³⁾, 67% of participants note the impact on the local community is a major consideration when making travel arrangements. An example of regenerative travel put into action is Tourism New Zealand, which invites all visitors to take the Tiaki promise: a promise to care for the people, the culture, the land, the sea, and nature of the country. Another interesting example is Kino Italy,

which organizes month-long coworking retreats in lesser-known corners of Italy where villages are at risk of extinction.⁽¹⁴⁾ The hope is that these digital nomads with money to spend will help reinvigorate struggling economies. Organizations like Pack for a Purpose encourage travelers to use available space in their luggage to provide needed supplies to the communities they visit⁽¹⁵⁾. And at the hospitality level, an example of a larger company with the ambition to support clients in their choices and their desire to act, based on the philosophy that every gesture, however small, counts is Accor’s ALL loyalty program partnership with Captain Cause, which enable ALL members to transform their reward points into donations to associations via the Captain Cause platform, to support causes important to them.

“Travelers are increasingly conscious of their environmental impact and the communities they visit, and are seeking experiences that leave a positive impact and brands that align with this philosophy. Through its powerful and diversified brand portfolio, Accor has a unique opportunity to increase awareness and inspire change, championing positive social and environmental impact through an incredible range of actions, from Novotel’s ocean protection partnership with the WWF to ibis RockCorps initiative. Our brands and teams have a responsibility to take action and have a positive impact.

— KARELLE LAMOUCHE
Global Chief Commercial Officer,
Premium, Midscale & Economy, Accor

How hospitality can contribute to impact and regenerate travel

As regenerative travel becomes a growing trend, with travelers who want to care for a destination and leave it better in some way, hotel brands are also taking action here, doing their part to make an impact as well as offering guests the opportunity to play an active role during their hotel stays. With balance at the core of the brand, Novotel has unveiled a significant partnership with the WWF (World Wide Fund For Nature) to champion the protection and restoration of the world’s oceans, the source of balance for the planet, through science-based action and conservation projects. In addition, WWF is providing technical expertise to Novotel by helping its 580 hotels worldwide to have a positive impact on the ocean through a variety of programs including raising awareness of the world’s oceans, advancing sustainable seafood policies, and educating guests, hotel teams, and local communities through lectures and other activities on the necessity of ocean conservation and how to positively contribute.⁽¹⁶⁾

Hospitality Opportunities

- **Design regenerative and inclusive travel experiences**
Offer the opportunity to participate in programs which encourage guests to leave a positive footprint, give back, and immerse themselves more closely in the local community.
- **Raise awareness for community needs**
Liaise with the community, local partners, and possibly even NGO organizations to participate in revitalization projects where tourism is used as a strength for economic and social renewal.
- **Drive off-season business as a means to give back to their community**
Many local communities rely on tourism; therefore, hotels which can drive tourism during these off-peak periods can help bring more revenue into the community.
- **Foster Talent support of the local area**
Lead by example through employee Volunteer Time Off (VTO) policies which encourage employees to volunteer in community projects, use their culinary skills to feed those in need, educational programs, and more.

The Connection to Local Just Got Deeper

Enabling more authentic local experiences

Travel has always been about discovering new places and cultures, but we are now seeing a significant yearning for people to use their travel time to have a more authentic local experience.

In a recent study, 85% of travelers said they want to visit a place where they can truly experience the local culture.⁽¹⁷⁾ It's no longer just about seeing the top tourist sights, but rather having a more genuine interaction with the destination and its people. On the popular Apple TV series, "The Reluctant Traveler with Eugene Levy," he travels to off-the-beaten spots around the world to meet with artisanal farmers and attend traditional local festivals to see real life in these locations versus the top sites and attractions. And the hospitality industry is honing in on this desire to experience something authentic, increasingly connecting guests and travelers to the destination as well as bring insider's insights on habits, expertise, and skills which may be unique to the area.

Time travel: New ways to discover local

Finding new ways to give visitors a way to make an authentic local connection is also being achieved through the creative, out-of-the-box approach of time travel, enabling people to see the destination at key periods in history:

- The Time Machine by NHK Enterprise to take people back to the 1964 Tokyo Olympics.⁽¹⁸⁾
- Destinations in Ireland offer augmented reality (AR) experiences to show the culture and history of other times.⁽¹⁹⁾
- Sculpteurs de Rêves creates immersion experiences in France, for example The Apaches de Paris to relive a bar during the period of the gangs of the Belle Epoque and Gatsby à Nice.⁽²⁰⁾
- Titanic Experience in Cobh – visitors get to experience what life was like on April 11, 1912 in the busy harbor town of Queenstown (now known as Cobh), Titanic's last port of call before heading to New York.⁽²¹⁾

79%

of Gen Z and Millennials agree they would love to partake in a day in the life of locals in the destination they are visiting.

Living like a local

Approximately 79% of Gen Z and Millennials agree they would love to partake in a day in the life of locals in the destination they are visiting.⁽¹⁷⁾

Not surprisingly, the hashtags for #houseswap and #homeswap have garnered more than 23 and 20 million views respectively on TikTok. A company called Twin City, which operates in Lisbon, Los Angeles, and other cities has curated a community of users where members can connect through the digital platform to exchange local city recommendations and swap their homes.

Another interesting example of this desire to live like a local is in enjoying the everyday experiences of residents, as with the Tsukiji fish market in Tokyo, which has now become a bonafide tourist attraction as visitors to the city seek the opportunity to spend time doing things local residents do. In the hospitality industry, Mercure is tying into this trend with its Discover Local programming, allowing hotels to give artisans and suppliers a platform to connect with travelers while offering a more in-depth and dynamic guest experience. Whether it's enjoying local wines from Jura Vineyard at Mercure Kraków Stare Miasto in Poland or participating in regional cooking classes and environmental initiatives at Mercure Iguazu Hotel Iru in Argentina, guests are invited to dive into the heart of each destination, creating memorable and authentic travel experiences.



“It is incredibly important for global brands to have local resonance — both for business success and guest satisfaction. A dedicated focus and understanding of the local market in which a hotel operates has become increasingly vital in the global hospitality industry, and through our leading brands such as Mercure, Accor is committed to fostering the connections between our brands and the local communities around them, enhancing the authenticity of the guest experience as well as optimizing operations for our owners.

— KARELLE LAMOUCHE
Global Chief Commercial Officer,
Premium, Midscale & Economy, Accor

There's a new movement afoot called “Proximity Tourism.”

Discovering the world in our own backyard

There's a new movement afoot called “Proximity Tourism.” According to sociologist Jean-Didier Urbain, Proximity Tourism offers “an exoticism of its own. It opens our eyes to the usual. It's about building connections. We are only half a traveler if we only know what is at the distance. Far, near, it's the front and back of the same coin.”⁽²²⁾

Staycations, in fact, continue to grow in popularity and the staycation market is estimated to reach around US\$ 758.1 million by 2033.⁽²³⁾ Why is it that the only time we become a tourist in our own city or town is when we are hosting visitors and then we marvel at some interesting exhibits or cultural experiences right under our own nose that we never took the time to discover? But this is all changing. People are exploring closer to home for a variety of reasons ranging from a desire to be more eco-minded and sustainable as well as a simple curiosity to find out what they've been missing and make stronger connections with their home community.

Interestingly enough, many travelers today are now focused on what's above them instead of what's across the world from them. Astrotourism has surged over the past few years as people become more interested in solar eclipses and starlit skies which can, quite often, be experienced simply by traveling short distances from the big city to a clear night sky without light pollution. This desire to travel closer to home and in new ways is also facilitated through a proliferation of apps like Park4night and Vanlife which assist people taking road trips in finding a great place to park that is close by to them. The business potential to help local residents see their hometown or near destinations in a new way is enormous, including the ability to promote off-the-beaten track spots which may have never been taken seriously as an actual tourism destination before.

Hospitality Opportunities

- **Offer local cultural and daily experiences discoveries**
Foster opportunities for guests to witness the area's culture and daily experiences of residents to gain deeper insights.
- **Be the gateway to the community with local partnerships**
Work with local DMCs, form partnerships, and offer local tours and other experiences which showcase local artisans and performers to help guests connect more deeply with the destination while supporting local businesses.
- **Create a new reason to stay local**
Design new stay experiences for local guests to want to stay at the hotel by enriching offers with cultural opportunities and other way to immerse themselves in the community.
- **Incorporate local experiences into meetings and events offerings**
Provide hands-on experiences with local cultures (short local craft workshop, tasting of local delicacies, etc. to infuse the destination into the meeting) as well as enable meeting and conference groups to contribute time to a local cause.

Welcoming the Blended Living Movement

Hospitality for Flexible Work and Leisure Time

Welcome to the age of fluid living. How we spend our time has vastly changed. There used to be clear-cut blocks of work time and play and relaxation time, but the lines have now blurred. While the concept of “bleisure” has been apparent for quite a few years now, the practice is becoming more deeply ingrained into our everyday lives as we take a more flexible and fluid approach to time. While at hotels, guests effortlessly move from moments of leisure to business and back again as they see fit. And they now expect the places they stay to more easily accommodate their variable needs. As a result, we are witnessing structural impacts, as well as effects on design, operations, and revenue streams. The times for hospitality are indeed changing.

Thinking Design for Blended Living • Leveraging the Business Opportunities of Fluid Living

#4

Bleisure

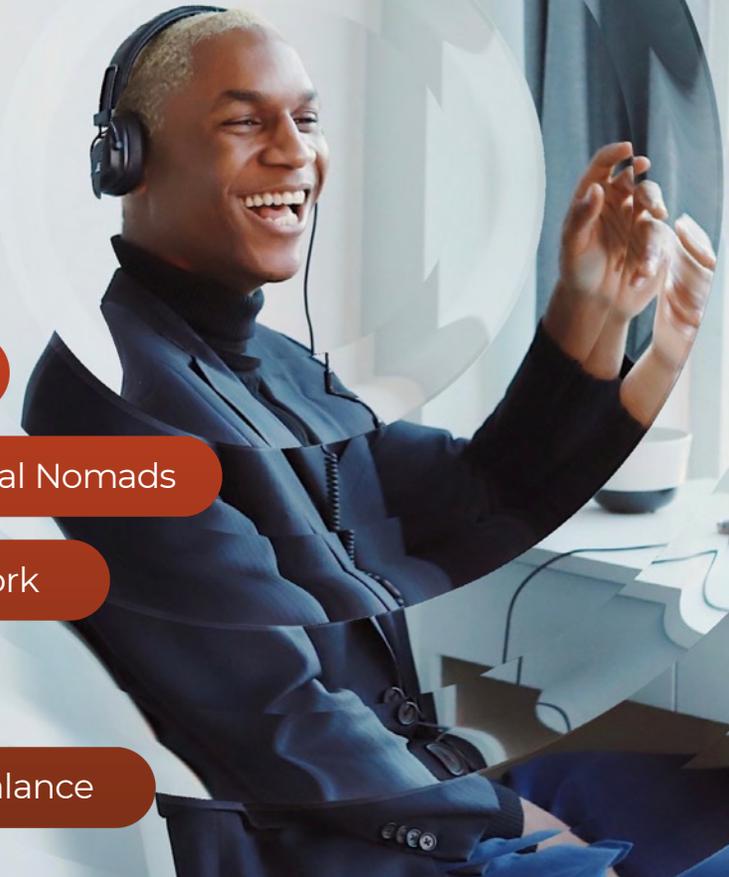
Design

Digital Nomads

Hybrid Work

Flexibility

Work-life Balance



Thinking Design for Blended Living



Rethinking hospitality spaces for the new way of living

Recent research shows how these shifts are impacting hospitality: According to an Accor survey among their international client database, 50% of guests have already experienced extended stay or are planning to do so, while a 2024 Skift research reports a 72% year-to-year increase in blended travel bookings.⁽¹⁾

Business travelers are also taking longer trips, with Amex GBT data noting many prefer more spacious suites with full kitchen and on-site guest laundry.⁽²⁾ So what does this potentially mean for the hospitality industry, how we approach our spaces, and whether our current facilities are suitable for the new demands of our guests? How can we capture the opportunities that can emerge, reframing our view on accommodations, considering adaptations that need to be made for real-time usage, as well as innovating and addressing a variety of challenges including space fatigue and flexibility for the different requirements of constant fluidity?

Key design elements for this new travel mindset

New mindsets bring exciting new opportunities. To think outside of the box — or guest room in this case — and conceive a new design for fluid living. This brings about the potential to incorporate a wide variety of features to accommodate shifting lifestyles.

For example, in creating spaces for longer stays, we might want to address the senses including biophilic design, colors, and scent. Accommodations can also become multifunctional— integrating a small kitchen, a quiet spot to work, and flexible design for video calls so the bed isn't visible behind the desk. Zoom-friendly lighting is among the top requests Mexico City-based designer Olga Hanono has been fielding, leading her to explore new fixtures — and to experiment with their placement. She said the traditional formula for lights, a bed, and workstations have all been turned on their head with the rise in guests partaking in blended travel. *"We don't want our desks facing the wall and the laptop camera to face the bed. There are new needs and activities to embrace and incorporate these days."*⁽³⁾ Taking it one step farther, long-term usage spaces might also enable guest personalization to add in a fun element of their own style. Evolving the design and experience can bring new opportunities to reinvent hospitality in imaginative new ways.

Hospitality Opportunities

- **Ease co-working**
Introduce co-working spaces (can increase RevPAR by up to 10%) or blend the function into the design, to be adaptable and flexible and accommodate blended living by guests and attract locals.
- **Create adaptive spaces for longer stays**
To address space fatigue, consider adding more square footage to accommodations, biophilic design for aesthetics, wellness, and local flavor, and furniture with multiple uses.
- **Adapt food and beverage spaces**
According to the fit with the F&B concept, consider adding communal tables enabling guests and locals to interact as well as private spaces for meetings, encounters and special occasions.
- **Design spaces with multiple purposes**
Repurpose a break-out room when not in use for a conference as a co-working space. Having flexibility with spaces enables a variety of target audiences, usage, and business opportunities.
- **Offer video friendly spaces**
Create a designed area for video conferencing with no music, partitioned areas for video calls, nice backdrops, etc. for locals and guests to use when they need to take care of business.

Keeping up with Times

Designing for the New Ways We Live, Work, and Travel



Hotel design is at a pivotal point in this moment in time. For a property to attract and accommodate the growing number of individuals who enjoy blended living (different moments of work, play, family, solo, group travel, etc.), it needs to be reimagined and reconfigured. But where do we start?

Accor design leaders **Damien Perrot**, Global Chief Design, Technical Services & Innovation Officer for Premium, Midscale & Economy brands, and **Anne Becker Olins**, Global Chief Design & Technical Services Officer for Ultra Luxury & Luxury sat down to discuss what this means for hotels and how Accor thinks about the use of spaces and design going forward.

How are these trends of fluidity of usage impacting the conception of hotels today?

DP We are no longer designing hotels by function. Instead we are putting guest expectations at the heart of the design process, mixing all different functionalities as a starting point, and putting creativity at the forefront of the design process to challenge the status quo.

ABO For the luxury traveler, creating a unique curated ambiance and in line with the brand DNA is paramount to the function of all spaces. We want to ensure spaces are designed for a variety of purposes, yet, we don't want something generic. At Fairmont Royal York in Toronto, for example, the vision was to create something bold and inviting, with a very exclusive mood. The focal point is a gigantic clock which is the entry to the Clock bar, reception, a seating/ waiting area, and a hidden speakeasy and restaurant.

How do you manage the mixed use of spaces and flexibility and how does it impact global floor plans and zoning?

ABO We are breaking with the principles of traditional hotel design to fashion innovative spaces and thoughtful ambiances, keeping in mind that the most natural approach is usually the most successful. Ideally, it is our philosophy to provide guests with the freedom to move around like someone in a private house. Any barriers or restrictions will

limit the experience and mindset of (ultra) luxury hotel design.

DP Hybridization is a consequence of how people live today. We move from creating spaces by function to enabling different atmospheres in one space; thereby giving guests the freedom to choose the best place to do what they want to do: be it relaxing, eating, and connecting with people depending on their mood, the people they meet, etc.

How will the design of public spaces be adapted to incorporate remote work?

DP Designs now integrate all of the elements for quality working conditions: ergonomic comfort, lighting, WiFi, and the latest technologies to create an experience which goes beyond the basics with other amenities like food and beverage adapted to this specific usage. For our guests, the hotel becomes a place to meet and connect with people. Our hotels are inspired by their location, sense of place, and environment to provide a unique atmosphere reflective of the city and its architecture, materials, movements, community, and neighborhood. Guests are not only coming into our hotels because they are a good place to work, but because the overall experience is very appealing.

ABO In the world of (ultra) luxury hotel design, the aspect of remote work is leaning more toward exceptional working facilities

The future of hotel design is here

The Pullman Singapore Orchard hotel recently unveiled an experimental initiative: The Transforming Room. Understanding the constant evolution of the world, Pullman knows the ways in which people travel, collaborate, ideate, and connect have changed as well. This innovative concept room focuses on the blended needs of today's traveler – one space designed to be a place to meet, work, relax, and sleep. Through multi-sensory design, all functions of the room can be customized and adjusted by the guests using a proprietary app. They can opt for a restorative sleep, a sensorial wake-up, a fitness and mindfulness experience or decide to transform the room into a perfect private dining room or work lunch area. Intuitive scent playlists, varied lighting, and accessories complement the technology to elevate the experience.



(professional desk or proper office) in the room and impromptu meeting spaces which are inclusive and exclusive at the same time. It is crucial for design to be enhanced by the right level of service. This means service is attentive yet discrete, with complete awareness of the guest needs when he/she is in work mode. At Fairmont Doha, exquisite pods are present in the lobby (featuring plugs, multiple seating, and tables inside), which can be accessed at any time with no reservation required. The hotel team members will simply come by to propose beverages if someone would like them.

How can design foster stronger connections between guests and the region's natural elements, life, and locals?

ABO It is gratifying to realize how the design can indeed create a connection with the local community. This is best achieved through genuine collaboration and integration by utilizing local materials, craftsmanship, furniture, art, and accessories, produce and local ingredients in the cuisine, cultural elements for entertainment, and training of local employees to work in the hotel.

Integrating biophilic design to bring local nature to the inside of the spaces is also key — emphasizing not just plants, but the air quality, scents, and impact of natural lighting.

DP Our goal is to bring the interior hotel experience outside, in order to make both

travelers and locals feel welcome to come in and experience unique hotels. The ibis concepts have a transparent façade, which is a good example of how we open the hotel to the city, make it very approachable, and then locals feel welcome to come in. The Metro concept for Novotel makes the pavement continue inside the hotel interior to invite locals to spend time in the hotel. The Metro concept exterior bar for Novotel is also a good illustration of how travelers and locals can intermingle and foster connections in our hotels' public spaces.

Another key for us in anchoring a property to the location is through biophilic design which is incorporated across all brands, not just Luxury or Premium, but also for Economy and Midscale brands. The Novotel Living Almaty Jetisu in Kazakhstan is an incredible example where we have floor-to-ceiling windows which look outside to trees — the green leaves become the fourth wall just beyond the glass. This type of design enhances the guest experience, increases well-being, and optimizes energy consumption and the carbon footprint.

If you had to design a hotel for guests 20 years in the future, how would it differ from today?

ABO Hotels, particularly for the luxury audience, will be a very alluring alternative to private residences, and clearly a departure from the current way of thinking about individual homes. With the new developments in blended living and how

people are being more fluid — very easily moving between work and leisure — this could actually manifest in an extreme way by blurring the lines between private homes and hotels. We can quite possibly see a time in the future where people might have a private home in one place, but then spend a great deal of their time in a hotel or hotels in different destinations for the rest of the year or significant portions of it.

DP I'll make a provocative prediction: in the 2040s, many people will choose to live in hotels instead of apartments.

To give you an example, today, in your apartment, you may have a dining room, and you invite people to come and share a meal at your home maybe once a week or once a month. Do you need those dining-room square meters every day? No. So you don't need such a big apartment. You can actually live in a smaller apartment as long as you are able to get certain services when you need them. A hotel can definitely meet those needs. Twenty years from now, the design and architecture of hotels will go a step beyond biophilic design which will completely shape the future of hospitality. A range of technologies, many of which already exist today, will also be integrated into hotels in order to make them self-sufficient.

Leveraging the Business Opportunities of Fluid Living



Hospitality is poised for exciting growth

Change always offers great opportunity — if you view it as such. Now that this mindset of more fluid and blended living is ingrained in society and has become the new norm, the business and development opportunities to capitalize on these shifts are significant. As an industry, we are now presented with additional avenues to sell and upsell hotels with exciting new facilities, services, and features, as well as to integrate these shifts in guest desires and behavior to develop entirely new styles of properties.

Fluid living creates new revenue opportunities

As we navigate this shift in global lifestyles — particularly how and where people choose to spend their time and the novel ability to work anywhere while combining business and leisure activities in a single hotel stay — the hospitality industry has become increasingly attuned to opportunities to capture new audiences and generate additional revenue. Basic additions like creating new service

offerings and packages which incorporate elements for seamless blended living are a perfect start. Hotels can — and already are — creating packages specifically for long-term stays and digital nomads — which prove to be incredibly helpful during low season and need periods. Making them available through booking websites like Nomad Stays⁽⁴⁾ which targets this market are also additional channel to drive revenue, with a growing number of hotels capturing this by offering long-term bookings on their websites as well as via OTA websites to target the digital nomad who is interested in more than the typical one-week stay.

Another opportunity in this increasingly fluid living world is to capitalize on the full digital ecosystem, in particular on the mobile phone — the indispensable tool for nomadic travelers — to drive bookings and build the client relationship. Customers benefit from the ease and choice of the type of content, the communication channel and the frequency and time of communication — a strategy implemented on the ALL.com website and app, with significant double-digit revenue increases.

Subscription offers prove their appeal

Alternative commercialization strategies to drive added revenue are growing, including subscription models and membership usage systems aimed at this new breed of traveler. In fact, the “subscription economy” is set to grow to \$1.5 trillion by 2025, more than double its

estimated worth in 2021.⁽⁶⁾ More and more hospitality and travel brands are looking at this model to retain high-value clients and drive revenue. For example, the Accor ALL Plus subscription cards offer a tailored portfolio to align to market specificities and best meet global and local travel needs, and offer two value boosters – greater discounts and status accelerator – ensuring clients receive the best value and feel more valued. Another example is Ennismore's Dis-loyalty travel & food membership, a paid-for subscription which gives all its members, instant access to discounts on hotels, food and beverage, and more at a curated set of 90+ hotels and 175+ restaurants and bars around the world – with bigger discounts for staying somewhere new. A variety of travel brands have expanded into the subscription service model of late, including Wizz Air, and Destination Clubs like Inspirato.

The “subscription economy” is set to grow to \$1.5 trillion by 2025, more than double its estimated worth in 2021.

| Hotels become living hubs

The growing appeal of a hybrid lifestyle and fluid living is creating significant opportunities for hospitality across the board, with people increasingly seeking versatility in hotel services and experiences to create a perfect base for both work and play. This trend shows no sign of slowing

down, and hotels can now, more than ever, capitalize on this shift to become “living hubs” – with the addition of entertainment venues with vibrant food & beverage offerings, coworking and wellness facilities, as well as extended stay opportunities in the same spirit of flexibility. Camil Yazbeck, Global Chief Development Office, Premium, Midscale & Economy, Accor, notes, “*At Accor, for example, our fully integrated and holistic hospitality ecosystem is particularly valued by hotel owners and investors. It offers a way to unlock significant value, optimize revenue opportunities and diversify investment risk through a differentiated service offering which caters to traveler needs and meets market demand.*”

| Mixing it up with branded residential

These shifts also create a favorable environment to further reinforce the growth of mixed-use development – where living, working, and leisure intersect –, creating new opportunities for hotel companies, investors and homebuyers alike. According to a recent report by JLL, mixed-use developments are a demonstrated source of added revenue potential for investors and developers, and command a rental premium of up to 20% as compared to single-use buildings. Branded residences are the most popular element of mixed-use development, growing 160% globally over the last decade. By the end of 2023, about 1,300 projects existed worldwide, with hotel-branded residences making up 82% of these projects.⁽⁷⁾

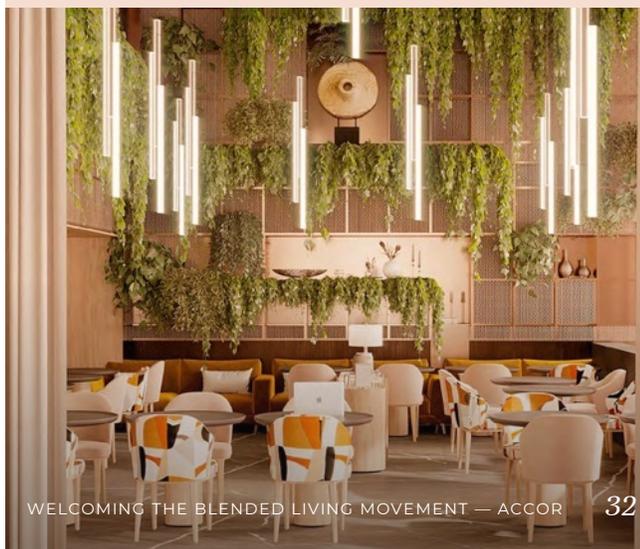
A prime example of innovation in this area is Accor One Living, an industry-first 360° platform focused on the development, design, and operation of mixed-use projects and branded homeowner communities. Launched in 2023, and now supporting 25 distinct brands, it leverages Accor's decades long experience in this space – via pioneering brands such as Fairmont and Raffles – to bring branded residential communities to life through architecture and design, facilities and amenities, experiences and global recognition. Tapping into this new hospitality sector promises exciting opportunities for future growth and value creation opportunities for investors.

“ *This is a time of exciting growth for the hospitality industry. Affluent customers today are seeking more diverse lifestyle offerings - enriching experiences, and services, vibrant food & drink venues, and social spaces - that far go beyond the traditional hotel offering. This includes branded residences, a rapidly growing and in-demand hospitality category. Accor is leading the way with some of the world's most compelling branded residences projects, such as The OWO Residences by Raffles in London, while Accor One Living, our industry-first platform, is dedicated to helping our partners develop and operate homeowner communities, opening up a whole new dimension of opportunity alongside our extraordinary hotel brands.*

— **AGNÈS ROQUEFORT**
Global Chief Development Officer,
Luxury & Lifestyle, Accor

— Hospitality Opportunities

- **Expand commercialization models**
Subscription models will boost income on a regular basis and drive loyalty.
- **Identify outlets and experiences to expand and enrich**
Food, beverage, and entertainment outlets provide opportunities to capitalize on the shifting habits of locals and guests alike encouraging more frequent and longer visits, as well as more high-value spends.
- **Capture the opportunities in mixed-use development**
This business segment provides opportunity for value creation, helping to minimize any potential financial risk as the variety of facilities — including residential, co-working, and private clubs — offer stable revenue streams and significant upside.



Protecting the Future Now

Building the Sustainable Hospitality of Tomorrow

The future is NOW. As a society, we are acknowledging climate change and the impact of our actions on the environment and people. We are acutely aware of our role as caretakers of the planet, making changes for future generations. The hospitality industry can play a key role by transforming its activities holistically, including investing, building, and limiting operational impact. The sector has made great strides, and sustainable hospitality's path forward includes actions with long-term positive effects from more environmentally minded construction and renovations, to integrating local communities and ecosystems.

- **Hotel Development for Long-Term Impact**
- **The Path to Sustainable Operations**
- **Imagining the Sustainable Hotel of the Future**

#5

Sustainable Hospitality

Hotel Development

Eco-conception

Regenerative Practices

Long-term Impact

Natural Resources



Hotel Development for Long-Term Impact



“ *When one-third of the global population doesn't have access to clean water, we cannot continue to create hotels as before.*

— SÉBASTIEN BAZIN
Chairman and CEO, Accor

Building more sustainable hotels creates value for the long term

Adopting a long-term sustainability mindset represents a growing shift and opportunity. Encouraging a focus on enduring impact for each new project is a strategic way to remedy environmental stakes and can also open up new avenues to manage and operate more effectively. In fact, a recent study found 73% of organizations have seen an improvement in revenue growth due to the implementation of sustainable product design strategies.⁽¹⁾

Furthermore, an internal Accor study, conducted in 2022 shows that 64% of hotel owners expect sustainability to have a positive impact on their business soon. Looking ahead, our industry has the opportunity to think hotel development differently - versatile building structures, renovations, eco-construction, location, and integration into the local community's needs - thus offering a more sustainable business model.

Accor's greet brand began with a sustainable mindset

Imagine creating a hotel brand from the ground up with a focus on sustainability. Accor's greet brand was conceived to provide a long-term solution for impact in terms of original hotel development. greet operates under a circular economy approach and gives a second lease on life to furniture and objects. The brand's philosophy is to better manage resources and avoid the production of new materials and products when it is not absolutely necessary by incorporating recycle, reuse, and uplifting.

“ *Sustainability in hospitality isn't just an ethical choice; it's a financially smart one that represents a return on equity opportunity for investors. Prioritizing sustainability enables investors to safeguard against regulatory risk and future-proof their investment. A recent study even reveals that 79% of investors regard ESG risks as crucial in their decision-making.⁽²⁾*

— CAMIL YAZBECK
Global Chief Development Officer
Premium, Midscale & Economy, Accor



“ ESG is at the heart of Accor’s development strategy and contributes to building the premium asset value and attractiveness of hotels in the luxury sector. Collectively, as brand operators, owners and investors, we must embrace the opportunity to be innovative leaders from an environmental and social perspective. Be proud to play a major role in shaping the future of our planet.

— AGNÈS ROQUEFORT
Global Chief Development Officer,
Luxury & Lifestyle, Accor

Letting the location dictate the design

A desire to build more mindfully provides an incredible opportunity for creativity and innovation. What if we were to embrace the location?

For example, before beginning construction on an undeveloped site abundant with natural resources, hotels can partner with biologists to map out all of the endangered flora on the property and also with zoologists to identify the fauna living in the area and determine the conditions needed to preserve their ecosystem. Sometimes this means building raised villas or houses to disturb the earth as little as possible. Taking it one step further, those partners can design a reintroduction plan for local fauna and flora which disappeared as a result of the construction and need help to re-establish themselves.

Another example of developing for the long-term is embodied in Saudi Arabia’s Red Sea hotel projects. Aligning with the KSA Vision 2030 for more sustainable development and a thriving economy where everyone has the opportunity to succeed, at the Red Sea development Accor is developing its hotel experiences, partnering with The Red Sea Development Company, a regenerative tourism project along Saudi Arabia’s west coast with an aim of diversifying the Saudi economy away from fossil fuels to enable the entire site to be powered by renewable energy sources. The project’s developer has also established a million square-meter Landscape Nursery, the largest in the Middle East, which is operated by about 350 workers (40% of which are Saudi Arabian) and provides 30 million plants for #TheRedSea and #AMAALA tourism destinations.

What and how you build matters

There is a growing importance of eco-conception — designing and building a structure with a mindset of incorporating sustainable and eco-friendly solutions and materials from the outset. With eco-conception, the building materials, structure, and internal mechanics can have as much of a “wow” effect and provide a key opportunity to develop hotels sustainably for the long-term.

For example, using traditional native design is increasingly becoming a critical focus of a sustainable approach to hotel development.

Julia Watson, design activist, and a leading expert of Lo —TEK nature-based technologies for climate-resilience — is a fan of “native technologies” in construction. Julia believes they “are really intelligent⁽³⁾ and capture the DNA of the ecosystem and communities. What’s incredibly sophisticated is a technology shaped by man and nature working together.” She is a proponent of design strategies which take into account the potential natural constraints of a location (heavy rainfall, flooding, intense drought) to utilize adapted design and construction style and techniques.

Another type of eco-conscious building is JO&JOE Vienna, a brand that is part of Ennismore, which has been awarded a Greenpass Platinum Certificate. The structure incorporates various eco-friendly features, including photovoltaic panels on the rooftop, special glass panels to prevent overheating, and 160 trees on the building to cool down the area 1.5° in summer and convert 3.3 tons of carbon dioxide yearly.

The growth potential in rethinking existing structures

There is incredible potential and promising opportunities in reimagining existing buildings for long-term sustainable use. One of the key trends in hotel development today as the sector transforms for the future, is an increasing focus on conversions. Indeed, more than 40% of Accor’s new projects signed are conversions, and a number of Accor’s most recent brand creations focus on conversions



conversions including Emblems and Handwritten as well as existing brands such as Mercure. To cite another example of the strong potential which lies in conversions, a historical apartment building in Krakow, Poland was transformed into the country's first vegan aparthotel embodying sustainability in every aspect including climate-neutral marmoleum flooring (made from recycled content like wood flour and renewable materials like linseed oil), recycled carpets, repurposed textiles, fabrics containing wool blends, and waxes sourced from beeswax.⁽⁴⁾

Fairmont Royal York in Toronto, Canada is now a Zero Carbon Building, but it didn't start out that way. This legacy property underwent a comprehensive renovation and decarbonization, bringing it from the past into the future transforming the hotel into a leader in sustainable hospitality, with the aim of reducing its carbon emissions by 80% through better control and electrification. This case study is an important model for the future of green building and showcases how eco-responsibility can be achieved even in historic buildings.

There is incredible potential and promising opportunities in reimagining existing buildings for long-term sustainable use.

Hospitality Opportunities

- **Consider how development choices can positively influence the local ecosystem**
Select projects and locations which have a positive impact on the local community and environment and be willing to walk away from those which don't comply.
- **Work with and support like-minded partners**
Accompany and participate with owners, operating companies, brands, and groups committed to long-term relationships, strong innovation, and integration of sustainable practices.
- **Think conversion**
Develop strong conversion brand propositions, with the brands and offers to facilitate conversion.
- **Choose eco-friendly materials**
Opt for eco-conception and construction with sustainable materials and energy-efficient designs in new hotels or renovations.
- **Work toward sustainability certifications**
Aim for certifications like LEED (Leadership in Energy and Environmental Design) and BREEAM (Building Research Establishment Environmental Assessment Method) to demonstrate a property's commitment to being future forward.

The Path to Sustainable Operations



| In it for the long run

According to the United Nations, we are living through a “triple planetary emergency.” Climate change is warming up the planet, while air, land, and water are becoming increasingly polluted, and biodiversity is rapidly being lost. The good news is that we have the potential (and increasingly the technology) to reverse it.⁽⁵⁾

As an industry, hospitality has a significant impact in a number of these key areas and has the opportunity to reinforce our actions now to have positive long-term effects.

Additionally, a UN Environment research has indicated that in a “business as usual” scenario, tourism would generate an increase of 154% in energy consumption, 131% in greenhouse gas emissions, and 152% in water consumption by 2050.⁽⁵⁾ Accor has calculated that its food and beverage activities comprise about 40% of the group’s upstream impacts on water. Collectively, the hospitality sector can adapt and transform industry practices for food sourcing and models, use of resources such as energy and water, and biodiversity to have significant long-term impact, address the concerns of our guests, and ultimately ensure and reinforce its sustainable performance.

“ The hospitality industry demonstrated, quite remarkably, that it could indeed change in order to meet short- and medium-term ESG goals — perhaps far beyond anyone’s expectations. But this is not the time to pause. Looking at all we, as an industry, have already achieved, we are now emboldened to climb – together – that bigger mountain of long-term environmental and sustainability goals and achieve equal success in collectively adapting our operations for enduring positive impact.

— BRUNE POIRSON
Chief Sustainability Officer, Accor

| Guests want to feel good about their travels

The good news here is that guests are also participating in long-term sustainability efforts by spending their dollars with brands which have an ESG focus. And our guests also recognize the need to change our long-term impact. In fact, 75%⁽⁶⁾ of guests are more likely to choose accommodation which implements sustainability best practices, underscoring the business case for pursuing sustainable solutions. Corporate clients are also doing their part in embracing a more sustainable meetings and events culture, with 70% saying sustainability has been strongly adopted in their meeting program.⁽⁷⁾

Good feels great

Let's face it, we all know that if the outcome of an activity isn't desirable or positive, people just aren't going to comply with it. So we need to work to make sustainability attractive, desirable, and aspirational.

- 53% of travelers are looking for an accommodation that has wow-factor sustainability innovation according to Booking Travel Prediction 2024.⁽⁹⁾
- Architect Bjarke Ingels (BIG), has coined the term "Hedonistic sustainability," meaning sustainability won't win if it isn't better designed and more enjoyable to live in.⁽¹⁰⁾

Sustainability certifications play a key role here in helping clients travel more sustainably by providing reliable information on sustainable options and thus meet this growing client expectation. A recent study⁽⁸⁾ notes that over half of B2C travelers would like to filter accommodation options based on sustainability certification and a study conducted by Accor of its M&E clients showed that 60% are more likely to book if a hotel has a third party certification.

In line with this, Accor encourages sustainable certification of its hotels, thanks to both local and global partnerships such as with Green Key and Green Globe, which will help Accor reach its target of 100% of its network eco-certified by 2026.

A long-term view of sustainable food and beverage

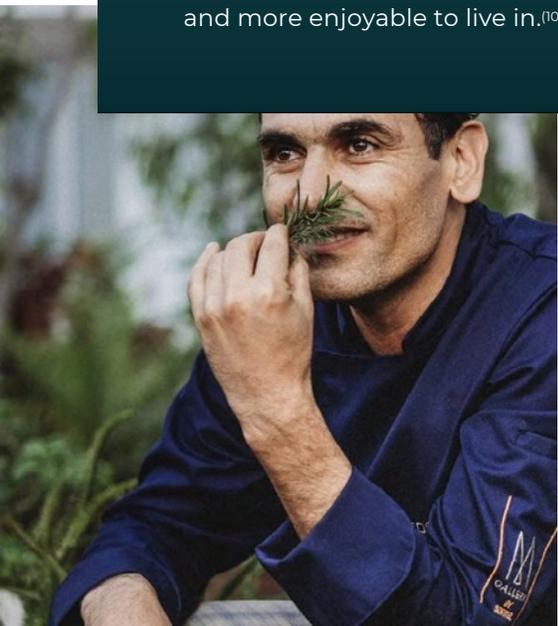
The hospitality sector has already taken great strides to minimize food waste which is key, and can go further in its longer term impact on food to foster a long-term agricultural model which relies on supporting sustainable farming, using locally-grown and products produced nearby, and consuming fewer animal proteins. By changing habits today like replacing animal proteins with plant-based proteins we can reduce greenhouse gas emissions (and therefore the carbon footprint by about 25%).⁽¹¹⁾ Looking outside of hospitality, Danone, the makers of Activia yogurt, sources over 90% of its fresh

milk and over 50% of plant-based ingredients locally in the country where the products are sold to reduce carbon emissions as well.⁽¹²⁾ In the hospitality industry, Pullman Paris Montparnasse recently took a step in this direction by removing beef from its spring/summer banquet menus and replacing it with vegetarian offerings. Another way to think long-term in the food chain is to grow it locally like Egypt's Mövenpick Resort Aswan, which has its own 30,000-square-meter eco-farm to provide fresh, healthy produce to guests.

With efficiency comes long-term power

Identifying ways to reduce energy consumption in hotels for the long-term is just not being a good global citizen, but it's good for business as well. As Camil Yazbeck, Global Chief Development Officer, Premium, Midscale & Economy, Accor explains, *"due to energy-efficient upgrades and operational savings, sustainable hotels can also benefit from a "Green Premium" of 10%-15% in asset value."*

According to HotRec Hospitality Europe⁽¹³⁾, implementing an ongoing energy efficiency strategy not only generates immediate cost savings, but it enables a hotel to realize long-term profitability faster from medium-term energy savings investments. It also enables a hotel to recognize and reward guests exhibiting energy conservation behaviors, improves



the hotel's reputation with customers and the community thereby providing a competitive advantage, and contributes to fostering a positive image of tourism destinations who help ward against climate change impacts from tourism.

Reducing reliance on the power grid

Sofitel Dubai The Palm has taken great strides to achieve self-sufficient energy. The property is effectively harnessing solar power with the installation of 232 solar panels on its rooftop, generating 2200 kW of heat output daily. This energy provision accounts for 50% of the hotel's hot water supply, thereby enabling a substantial reduction in traditional energy consumption.

The case of water

Water is our planet's most vital resource, yet access to water and clean water is also a scarcity in many areas around the globe. The hospitality industry consumes a significant amount of water, and therefore has a stake and role to play in optimizing water preservation and management for the long term. For example, Accor has worked to foster responsible water management (e.g. rainwater collection, desalinated water for irrigation or consumption, water required for cooling), as direct operations generate approximately 40% of the Group's global water footprint. As an example of how one property is thinking long-term about water usage, the Pullman Bali Legian Beach implemented Biopore Infiltration Holes throughout the resort's open garden areas which absorb rainwater and process organic waste, thereby attracting microorganisms which organically enhance rainwater absorption and naturally enrich the soil. This is just one example of creativity and innovation in working to address long-term water conservation issues, demonstrating how embracing these challenges can have enduring benefits.

Ensuring the viability of the local ecosystem

The appeal of a new hotel or resort location is often tied to the area's unique setting (landscape and wildlife). The hospitality industry thus has a particular responsibility to ensure the enduring preservation of the

local natural ecosystem. In a context where the industry will soon be called upon to demonstrate compliance with the national biodiversity impact regulations set by the 2022 UN Biodiversity Conference (COP15), even more key moving forward will be the range of creative, innovative, and impactful initiatives in the sector such as enhancing green spaces and improving environmental factors such as vegetal walls and urban vineyards as well as falconry, mangrove, and coral restoration. A model for this practice is Fairmont Mount Kenya Safari Club's Bongo Program, which aims to restore the Near Threatened IUCN Red List population of Bongo (antelope). The efforts involve enabling the animals to populate in a captive-bred herd and then primed for survival in the wild. The long-term objective is to achieve a population of over 750 animals in the next 50 years. According to Curtis Munyoli, Learning and Development Manager: *"As part of our conservancy efforts, we focus on three key pillars: the Bongo Breeding and Rewilding Program, the Animal Orphanage, and the Conservancy Education Program to drive change and inspire our team to make meaningful contributions to our community and environment."*

The hospitality industry can create and offer a wealth of possibilities to find the most impactful ways to positively preserve and promote, rather than impact, the natural ecosystem around each hotel to think long-term impact on the planet, sustain destinations, and maintain their appeal to visitors.

Hospitality Opportunities

- **Become part of the local community**
Engage with local conservation activities or spearhead new initiatives to be a helping hand in resource management, rather than a cause for scarcity.
- **Revise food sourcing practices**
Identify more local food sources, create on-site farming, and incorporate plant-based options on menus which also makes guest experiences richer and more locally authentic.
- **Define a path for energy management**
Review usage of natural resources (energy, water, etc.) and plan a long-term strategy which incorporates conservation, scarcity, and contributing resources back to the community.
- **Engage Talent**
Create a team interested in conservation and encourage them to innovate ideas for protecting or restoring the biodiversity of the area.

Location

Location will still be everything — and this includes determining how the location will both attract visitors from shorter distances to limit carbon-intensive tourism as well as how it will fit in, affect, and support the local community. Conducting environmental impact and risk assessments will become *de rigueur* prior to any construction.



Construction

Conversions and renovations will be key in the future. Yet if a new build is the best option, this presents a great opportunity for eco-conception, using eco-conscious and even locally sourced materials and planning for how the property can make contributions to local resources versus depleting them (e.g., solar panels, rainwater harvesting systems, etc.).



Partners

The success will be where everyone (operators, owners, investors, etc.) has a commitment to sustainability and local anchorage. The path forward can include innovation and performance, for example sourcing local designers and craftsmen for the initial build, and integrating area businesses for product/service sourcing as well as local Talent for an enriched guest experience rooted in community, which also helps create a social elevator for inclusion.



Guests

Hotels can be a magnet for like-minded people committed to sustainability and authentic local experiences. Travelers and locals will increasingly want to spend their hard-earned income with properties prioritizing sustainability. Guests focus on conscious exploration, reducing their carbon emission impact by traveling locally, and staying with hotels which offer authentic experiences and share their values.



Imagining the Sustainable Hotel of the Future

How could properties be designed to meet the evolving needs of guests, incorporate more sustainable features, engage the local community, and preserve natural resources for the long-term? Let's check in and imagine a prospective vision of the hotel of the future.

Access

A key part of future sustainable operations will be in recognizing how guests will access the property and discover the destination around the hotel. It will be customary to reward guests who embrace sustainable transportation, travel from closer-in destinations, and who utilize soft mobility (bicycles, walking, public transportation) while at the destination.



Culture

In the future, the importance of authentic local experiences to enrich guest experiences will be stronger than ever. Guests endeavor to learn what makes a destination tick by discovering the location, the people, and the culture in a variety of ways. The ability to give back or contribute to the local community will also play a vital role.



Facilities

Flexibility is key. Facilities will predominantly be adaptable spaces which can be changed throughout the day and night and used by a variety of audiences (guests, Talents, and locals) as well as diversify revenue streams for owners. F&B, wellness, co-working, and modular learning offerings will have appeal to Talent, locals, and guests with a component to give back to the community.



Responsibility

We are responsible for the community we call home. Expectations for hospitality in the future will center upon demonstrating responsibility to the community. This includes a commitment to a local team of Talent to run the hotel backed by the brand know-how, as well as respect for the local resources (food, energy, and water), and to the ongoing development of the local natural ecosystem, community and culture.



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