

# GREEN LODGING TRENDS REPORT 2017



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**Published by**

Green Lodging News and Greenview

**Printed by**

Greenview, Singapore

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# ABOUT

## GREEN LODGING NEWS

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[Green Lodging News](http://www.greenlodgingnews.com), a Hasek Communications L.L.C. publication, is the lodging industry's leading environmental news source. Created in 2006, it consists of the Green Lodging News website ([www.greenlodgingnews.com](http://www.greenlodgingnews.com)), weekly Monday e-newsletter and weekly Wednesday [Green Supplier Spotlight](#) e-blast that focuses on one supplier. The website currently attracts 36,000 to 38,000+ different visitors each month. The newsletter and Spotlight reach more than 9,000 opt-in subscribers. To subscribe to the newsletter and Green Supplier Spotlight, go to [www.greenlodgingnews.com](http://www.greenlodgingnews.com), or e-mail [editor@greenlodgingnews.com](mailto:editor@greenlodgingnews.com) to be added to the circulation list.

Publisher and Editor Glenn Hasek has more than 24 years of lodging industry experience—as a journalist, public relations consultant and publisher. He got his start in 1989 with what was then Hotel & Motel Management magazine. He worked there until 1996 and again with the publication from 2000 to 2001. Glenn Hasek has spoken and moderated at many industry events and has received numerous awards for his work.

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## GREENVIEW

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With offices in the United States and Singapore, Greenview supports hospitality organizations with their corporate responsibility and sustainability platforms to drive profitability, streamline data management, keep up with trends and provide effective communications for their stakeholders by leveraging the power of data, common guidelines, best practices, and innovation. We work with you to set strategies, develop programs, measure, and report on sustainability, social responsibility, and ESG. We also offer a specialized online sustainability data platform to make routine tracking, reporting and advancing in sustainability easy.

Greenview has a niche focus and expertise in the hotel industry and works with many of the hotel industry's leading chains including Marriott, IHG, Wyndham, Mandarin Oriental, Hyatt, and Hilton. Beyond hotel companies, Greenview works with research institutions, destinations, and cruise lines to catalyze sustainability as the industry's thought leader.

In addition to advising leading global organizations, Greenview has launched several innovative industry initiatives including the [Cornell Hotel Sustainability Benchmarking Index](#), [the Hotel Footprinting Tool](#), the [Hotel Owners for Tomorrow](#) coalition, and the [Green Venue Report](#).

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# ACKNOWLEDGEMENTS

We would like to thank the following individuals, without whom this report would not have been possible:

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Founder  
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**Anantara Resorts & Golden  
Triangle Asian Elephant Foundation**

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**ClearWater Tech, LLC**

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## 2017 SPONSORS



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# INTRODUCTION

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Green Lodging News, lodging's leading environmental news source, and Greenview, a leader in advancing hotel sustainability, are excited to present our second annual Green Lodging Trends Report. Within this report you will find the results of a survey conducted May 1, 2017 through June 15, 2017. The survey was conducted with the support of Avendra, Brighton Management, Boston Green Tourism, Caribbean Hotel & Tourism Assn., GreenOtels, Green Key (FEE), Green Key Global, Green Seal, Horwath HTL—Asia Pacific, and Travelife. The report is sponsored by Cass Information Systems, Inc., ClearWater Tech and reCollect2.

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The Green Lodging Trends Report is the lodging industry's annual exercise to assess and catalyze green innovation, best practices, and awareness regarding the state of sustainability across hotels worldwide. In recent years, sustainability and the measurement of environmental performance have become standard within most major hotel companies around the world. This has been driven by interest in improving operational efficiency, reducing costs, and lessening one's environmental impact in response to growing evidence of climate change.

The Green Lodging Trends Report is conducted at a time of growing global interest in reducing environmental impact. Even with the United States' withdrawal from the Paris agreement, the lodging industry continues to move forward by setting new, aggressive goals for energy, water and waste reduction. Green building techniques increasingly are becoming more commonplace and advances in technology are making "going green" easier and oftentimes less costly than more traditional alternatives.

The Green Lodging Trends Report highlights and summarizes responses to 110 survey questions in these categories: Air Quality, Back of House, Climate Action and Certification, Communications, Community Involvement, Energy Management, Health and Wellness,

Staff Involvement, Waste Management, and Water Conservation. Our report also takes a look at the most common green practices among respondents, what sustainability initiatives are trending, and what practices are most innovative.

Respondents included titles ranging from General Manager to Innkeeper to Sustainability Director. Property types ranged from large resorts to small inns. Admittedly, this type of survey tends to draw hoteliers already invested in sustainable practices. That said, results demonstrated a wide range of implementation of green practices—from just beginning to tackle "low hanging" fruit types of initiatives to extensive renewable energy projects.

One purpose of this report is to establish a benchmark against which one can compare one's own property from year to year—whether that is against one's own progress or that of other similar properties. While impossible to tell the individual stories of thousands of properties, this report includes examples of best practices in action throughout the world.

Thank you to all of you who supported this year's Green Lodging Survey—whether through your support, sponsorship or participation. Be sure to share the results with your colleagues.

# SUMMARY & KEY FINDINGS

## DATA SET

The 2017 Green Lodging Trends Report received data for 2,093 hotels across 46 countries. Of the overall data set, 1,233 properties were classified as City/Urban Hotels, 491 as Resorts, 199 as Convention/ Conference Centers, 99 as Suburban Hotels, 32 as Airport Hotels, 21 as Bed & Breakfast (B&B) Hotels and 16 as Serviced Apartments (the remainder of the properties are unidentified). A total of 1,872 properties of the data set were located in Asia-Pacific, 179 in the Americas, and 42 in Europe, the Middle East and Africa. In terms of service type, 1,902 (92 percent) properties were classified as full-service properties, and 163 (8 percent) were classified as limited service. Overall, the data set and findings are most representative of full service hotels in Asia Pacific.

Last year, most of the results in the trends report are presented in global, service type and regional aggregation, however, for the year 2017, additional hotel type aggregation are presented for selected practices. Participants received an insightful Benchmarking Report with further peer analysis by location and market segmentation across all the best practices surveyed.

The responses do not represent the full data set, as participants were not required to answer all questions. The full data set also includes integration from other sources to augment the missing regions and hotel types. The results presented below and in each topical segment of the report represent the findings and trends that could be discovered through these varieties.

By means of continuous industry and sponsor support, succeeding Green Lodging Trends Reports will be able to present the trends information with a larger data set, improved categorization and refreshed best practices to further advance sustainability in the lodging industry.

## KEY FINDINGS

### Limited Service Hotels are stepping up their game

Last year, we noted that full service properties are not always “greener” than limited service, which has often been the misconception. Yes, full service hotels generally have more resources and can do more around sustainability. However, we found in the responses that limited service hotels are continually improving in the areas of sustainability, going toe to toe with full service properties and in some cases even beating them in adoption rate. This year most notably where

hotels indicated their plans to adopt best practices within the next twelve months, limited service properties consistently showed higher intention to implement, including areas such as forming a green team and designating a green champion, donating leftover bathroom amenities, and installing EV charging stations.

Guest health and wellness is a growing hot topic in the lodging industry and limited service properties have been responding well to this trend. Guests are also paying closer attention to the products that they use. When it comes to offering eco-friendly amenities, limited service properties are far more advanced. Eighty-nine percent offer eco-friendly amenities while 57 percent of full service properties offer this. Toxic substances in paints used to paint guestrooms and guest corridors can be hazardous to guests' health and well-being. Over 90 percent of limited service properties use low-VOC or VOC-free paints during renovations, slightly beating full service properties at 88 percent. Indoor air quality is also important to guests and employees' health. Offering 100 percent non-smoking guestrooms were fairly close, 60 percent of limited service properties offer this while 53 percent of full service properties do.

In other areas, limited service properties may have lower adoption rate than full service properties. However, the trend still indicates that they have been improving year over year. Although 65 percent of full service properties indicated they have water sub-metering, almost a third of the limited service properties said they did too. Another example is having procurement requirements for their suppliers. Sixty percent of full service properties have this practice in place while 49 percent of limited service properties do, which is not too shabby at all.

### Hotels are gearing up for team efforts

Similar to last year, 68 percent of respondents globally indicated that they have a green team in place at their properties. Among the regions, EMEA leads the way with an adoption rate of 86 percent. The Americas and Asia Pacific had 66 percent and 68 percent respectively. While the uptake of this practice stayed the same, green teams having a budget for implementing green initiatives gained about 10 percent increase in uptake from last year at 52 percent.

Another 14 percent indicated that they plan on setting up a green team in the next 12 months. These hotels should consider including a budget specifically designated for implementing green initiatives to enable their newly added green teams to be more effective. With a continuous increase in the practice of having



a green team budget (52 percent globally, compared to 44 percent last year), we can expect more hotels to add green teams at their properties.

We typically expect full service hotels with bigger teams to have green teams in place. However, we've seen in the responses that limited service hotels are also adding a green or a green champion. With a smaller team on property, it's impressive to see that almost 60 percent of limited service has a green champion on property. Sixty-nine percent of full service properties responded to having a green team, while 50 percent of limited service properties said that they have one.

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### Guests are giving feedback, and it is valued

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Hoteliers take guest feedback quite seriously as they stand for hospitality. So, when it comes to guests' feedback on sustainability at the property, hoteliers are also listening to their guests and doing something about it. This year, 31 percent indicated that guest comments led to a change on-site related to sustainability. This was a big jump from 24 percent last year. Both EMEA and Asia Pacific had higher percentage of hotels that took guest comments to make sustainability related change, 37 percent and 47 percent respectively, compared with 26 percent for the Americas. For the hotels that responded to having green teams, guest comments can be a great discussion topic during green team meetings to discuss how to improve their sustainable operations based on their guests' feedback.

More and more guests expect hotels to have integrated at least some elements of sustainability into their hotel operations, building and design. Communicating these efforts will increase guest experience as well as gain valuable feedback to continually improve. Luckily, 73 percent of the hotels globally are doing so in the guestrooms. However, only 51 percent of the hotels share their green practices on their websites. Including information on existing green practices on the hotel websites will certainly attract the guests that are seeking greener accommodations.

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### Guests are more interested in their ability to make an impact

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Overnight guests asking about carbon offsetting increased drastically from last year's uptake of 28 percent to nearly 50 percent this year. This demonstrates that guests are taking a big interest in making a difference at their stays.

We have a growing trend towards offsetting carbon to achieve emission reductions with hotel guests as well as with businesses. With the unfolding of outcomes from implementing the Paris Agreement as well as the multitude of corporate commitments and engagement

of customers across all consumer areas, the topic is hitting home more than ever. We continuously see research indicating the majority of travelers prefer eco-friendly travel and have interest in making a difference or paying more, and the gap may be closing to match that willingness with methods of doing so.

We will most likely see a continued growth in green-minded hotel guests seeking carbon offsets and other ways to contribute. Hotels should consider additional ways for guests to make an impact, and most importantly getting the message right for how both hotels and guests are helping. One of the ways can be implementing practices that involve guest participation such as placing a recycling bin in the guestrooms and having a donation bin on the last day of guests' stay. We've all traveled to places and have left unwanted clothing before. It would make the guests feel good about "throwing out" their belongings.

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### Climate Change is increasing as a driver of investment and operation improvement

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When asked "to what degree does climate change drive you to make operational improvements and investments?", the percentage of hotels that said "yes, it does have impact" were almost identical to last year's 84 percent. What's notable is that, of the hotels that said yes, more of them shifted to "having significant impact" over "having some impact this year. Almost 40 percent of hotels globally responded that it has significant impact. This was an increase from last year's 28 percent. The effects of climate change — whether they be regulatory such as restricting irrigation, raising energy load from extreme weather, or addressing flood risk — unfortunately are forecasted to become more intense which will change the conversation of the "business case for sustainability" entirely this decade.

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### Food & Beverage is going local

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Guests' growing interest in local foods are related to health and wellness reasons but also for better storytelling, perception of quality, and of course the ability to foodstagram. While this practice enhances guest experience, it also supports the local community and reduces environmental impact (due to shorter distances to transport goods). Sixty-eight percent of hotels globally responded that they spend at least 50 percent of their food and beverage spend from local sources. The practice of having a local procurement policy has also jumped to 82 percent from 74 percent last year. Local procurement is one of the best all-in-one examples for hotels to converge on something good for the planet, for the guest, and for the bottom line.

Sourcing locally is not the only way to do this, however. Hoteliers can choose menu items that contain less



meat, which is a quick way to reduce the hotel's carbon and water footprint, provide healthier options to guests, and hopefully cut costs too. This seems to be a common practice with 85 percent of hotels indicating that they have vegetarian menu options. Some hotels are going as far as growing food on-site. Forty-two percent of hotels indicated that they do so. Interestingly the percentage for full service properties and limited service properties were close, 41 percent and 43 percent, respectively.

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### **Human trafficking action plans much less prevalent in limited service hotels**

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Human trafficking is thought to be one of the fastest-growing activities of trans-national criminal organizations. It is estimated that at least 21 million victims are trapped in modern-day slavery (one of the components of human trafficking), mostly involving women and children. In fact, according to the Mekong Club there are more people living in slavery today than ever before on record. This topic is highly relevant to the travel and tourism industry as hotels are at risk not only for being in locations where human trafficking and exploitation instances exist, but also because they make a difference by ensuring the purchases made in high-risk areas such as clothing and food come from vendors adhering to responsible practices and certifications. The topic is getting more serious, as any hospitality company based in the UK will tell you, now having to publicly report on the issue via the Modern Slavery Act of 2015.

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### **Some hotels are still delivering newspapers to guestrooms**

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How many of you have kicked the newspaper aside in the morning as you left your guestroom? Guests are increasingly using digital mediums to get their dose of morning news, and busy with morning emails and calls before getting the rest of the day started. Although most of the hotels are not delivering newspapers to guestrooms, still around 20 percent of hotels do. And that still adds up to a lot of waste. So why are some hotels still delivering newspapers regardless of whether the guests want them or not? In 9 percent of cases hotels indicated this was because of a brand standard, maybe it's time corporate offices re-evaluate this standard as it seems to be stuck in the past. And for good reason too, as unwanted newspapers create a lot of unnecessary waste and cost.

It is undeniable, a portion of guests may still prefer a newspaper, but similarly many also still want shark fin served in restaurants and banquets, but that did not stop the world's top luxury hotels from removing it from their menus. With sustainability, hospitality businesses will always struggle with the balance between influencing the guest and responding to their requests

with excellent service. Yet as with evolving trends, a tipping point exists and one of the most important considerations of responsible business is to accelerate and then join that tipping point.

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### **More hotels gearing up for certification**

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Sometimes, you can gain a lot of insight by asking whether the hotels "plan on" implementing a certain practice as opposed to just asking whether they have it or not today. When asked, "Is your property third-party labeled or certified for its sustainability initiatives?", 10 percent of the hotels indicated that they plan on doing so in the next 12 months. By service type, 18 percent of limited service properties indicated that they plan to do so, eight percent higher than full service properties. This is another indication of limited service segment stepping up in sustainability.

Certification labels such as Green Key (FEE), Green Key (Global), and Travelife all have extensive criteria that the hotels must adhere to in order to obtain their certification. Though many of the labels have different levels to encourage hotels to improve year over year, it would mean that the hotels that have a third-party certification would have many of the common practices in place. So, it's encouraging to see that even 10 percent of the hotels are planning to obtain one in the near future, as the overall global prevalence of certification is less than 10 percent. Even though it may take more than a year for hotels to obtain one due to criteria compliance and even renovation cycles for some building FF&E specifications, it's a positive sign towards the hotel industry advancing in sustainability.

# ENERGY MANAGEMENT

You don't have to look far in a hotel to see something consuming energy. Energy is one of the greatest costs in a hotel and energy consumption is one of the easiest things to impact—both negatively and positively. More than half of the respondents (54 percent) to our survey said, for example, that at least 75 percent of their interior light bulbs are LEDs (excluding specialized bulbs for historic lighting fixtures such as antique chandeliers.) Hoteliers utilizing LEDs quickly reduce energy consumption and costs. And, impressively, 42 percent of respondents said at least 90 percent of guestrooms have occupancy sensors for reducing heating/cooling when guestrooms are unoccupied.

Last year, 63 percent indicated using digital thermostats in guestrooms. This year, 75 percent of hoteliers said at least half of their guestrooms have digital thermostats. Fifty-five percent said at least 90 percent of meeting rooms have digital thermostats installed. Twenty-six percent indicated that at least 90 percent of meeting rooms are equipped with occupancy sensors.

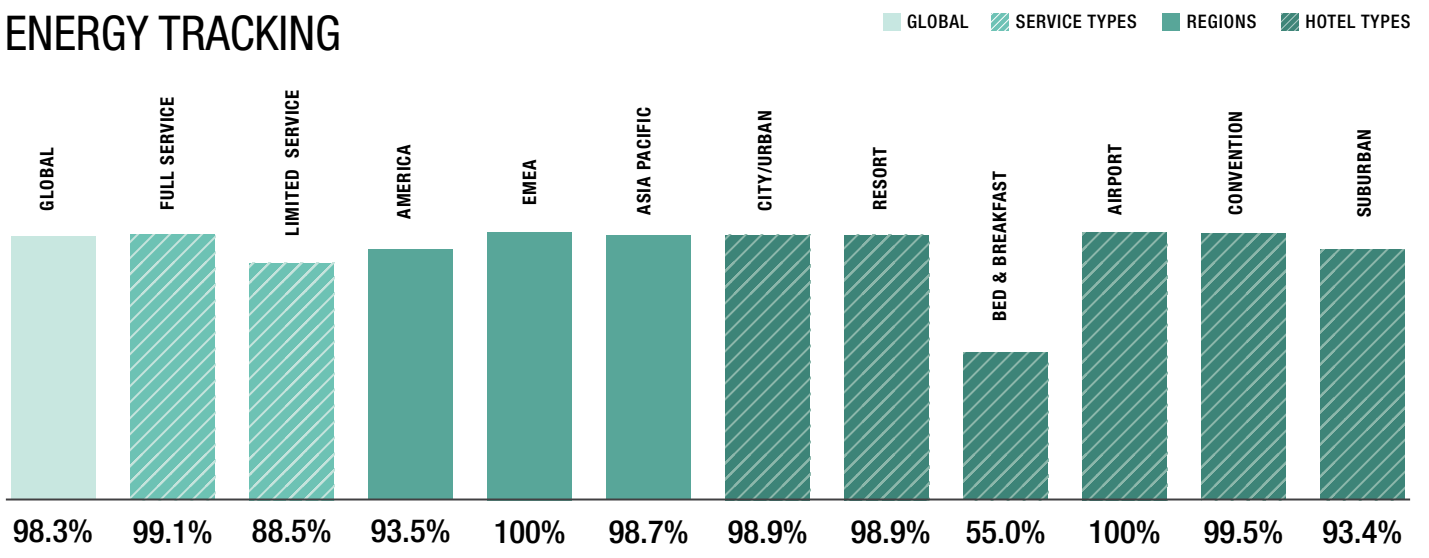


Hotel Groton, New York, USA

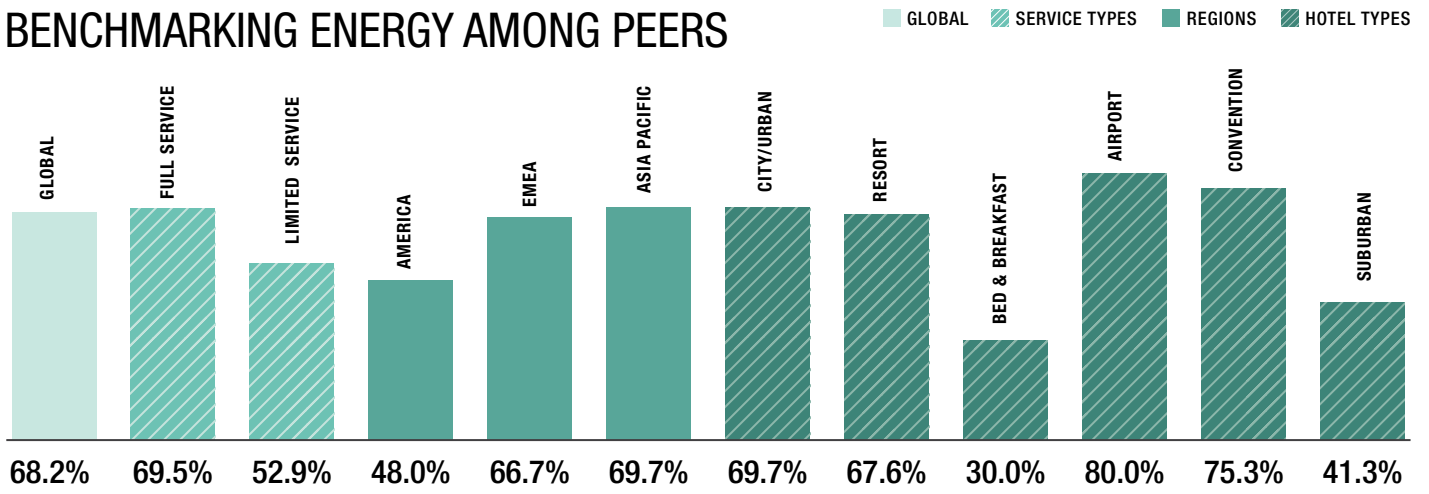
“We have a custom multi-part refrigeration system and all LED Lighting Program which has dramatically reduced energy consumption. The property is 100 percent all Electric (Fossil Fuel Free) and powered by a Cooperative Run on Hydro-Power from Niagara Falls.”

Almost everyone (98 percent) said they track energy consumption on a regular basis. Forty-seven percent said weekly, 49 percent said monthly, 1 percent said quarterly, and 1 percent annually. Forty-four percent said an energy audit had been conducted in the last four years. Sixty-eight percent indicated they benchmark energy performance against peer properties in their company’s portfolio. Fifty-seven percent said yes when asked, “Has building re-commissioning been undertaken in the past three years to improve the operation and maintenance of buildings systems (e.g. mechanical equipment, lighting & building control systems)?” Sixty-two percent said energy consumption is sub-metered in various areas of the property (food and beverage areas, guestrooms, fitness facility, public spaces, etc.).

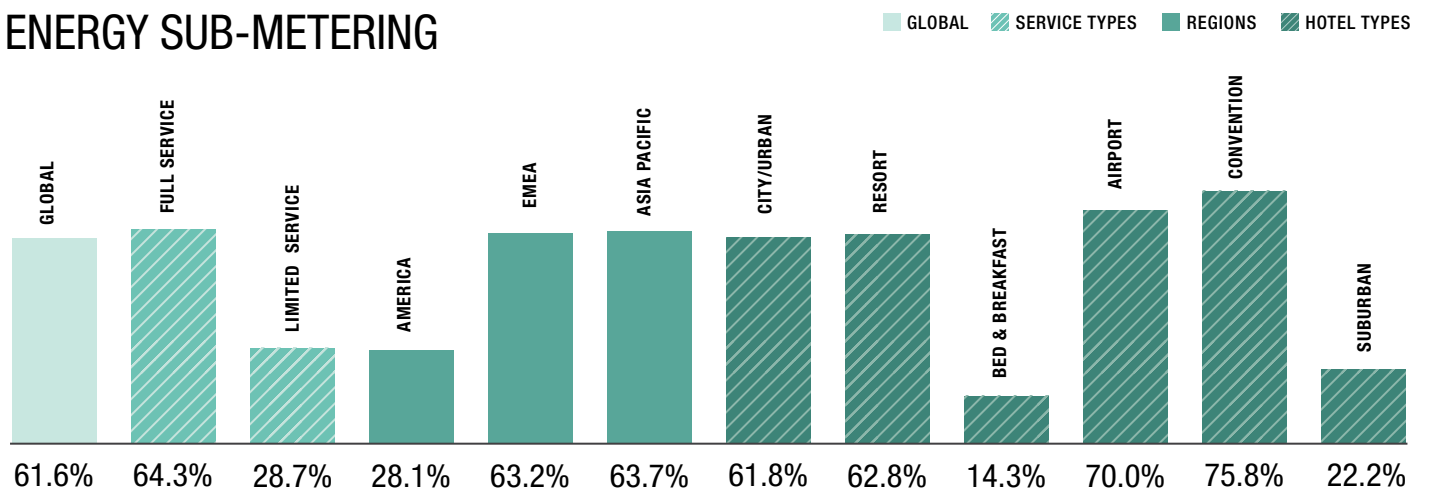
## ENERGY TRACKING



## BENCHMARKING ENERGY AMONG PEERS



## ENERGY SUB-METERING

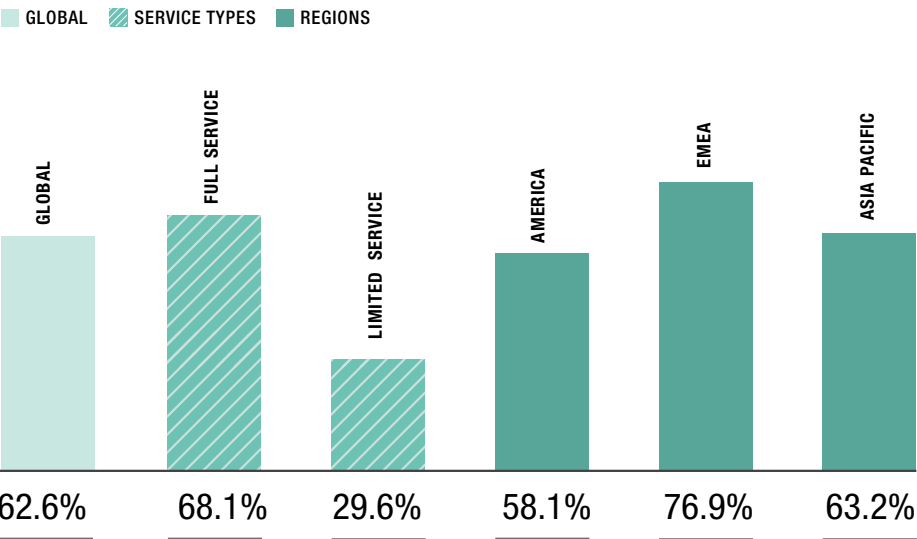


Last year we asked, “Are variable frequency/speed drives and/or Electronically Commutated Motors installed in any HVAC systems, or elsewhere?” Eighty-nine percent said yes. This year, 84 percent said yes. Fifty-three percent indicated they are used in main air handling units, 33 percent said they are used in kitchen hoods, 49 percent said in elevators, and 44 percent said refrigeration units.

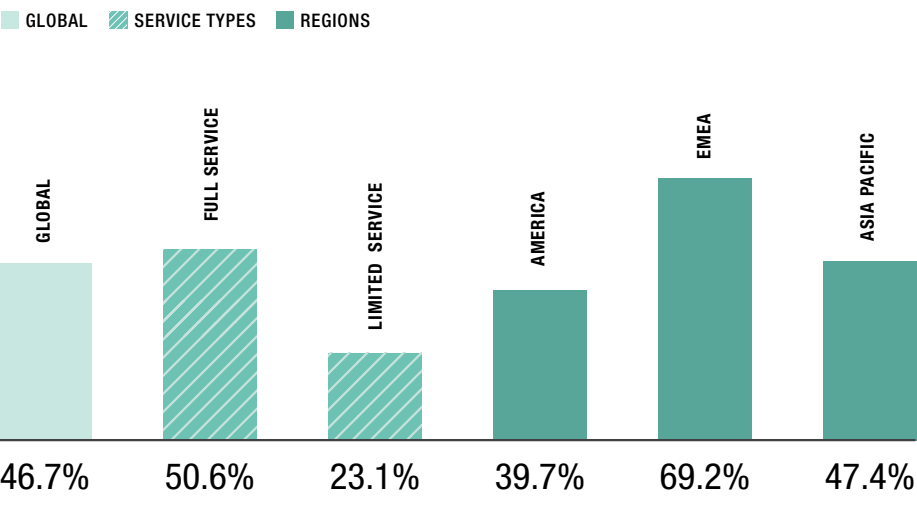
Last year, 70 percent said boilers were high-efficiency. This year: 63 percent. Last year, 59 percent said chillers are high-efficiency. This year: 47 percent.

Forty-two percent said at least 90 percent of windows have some type of reflective film to reduce heating and cooling loads. Just 4 percent said they incorporate humidity sensors in bathroom fans to turn them off when not needed. Eighteen percent said they recover waste heat for reuse. Four percent of those respondents said that happens in the kitchen. Six percent said it happens in the laundry.

HIGH EFFICIENCY BOILERS



HIGH EFFICIENCY CHILLERS





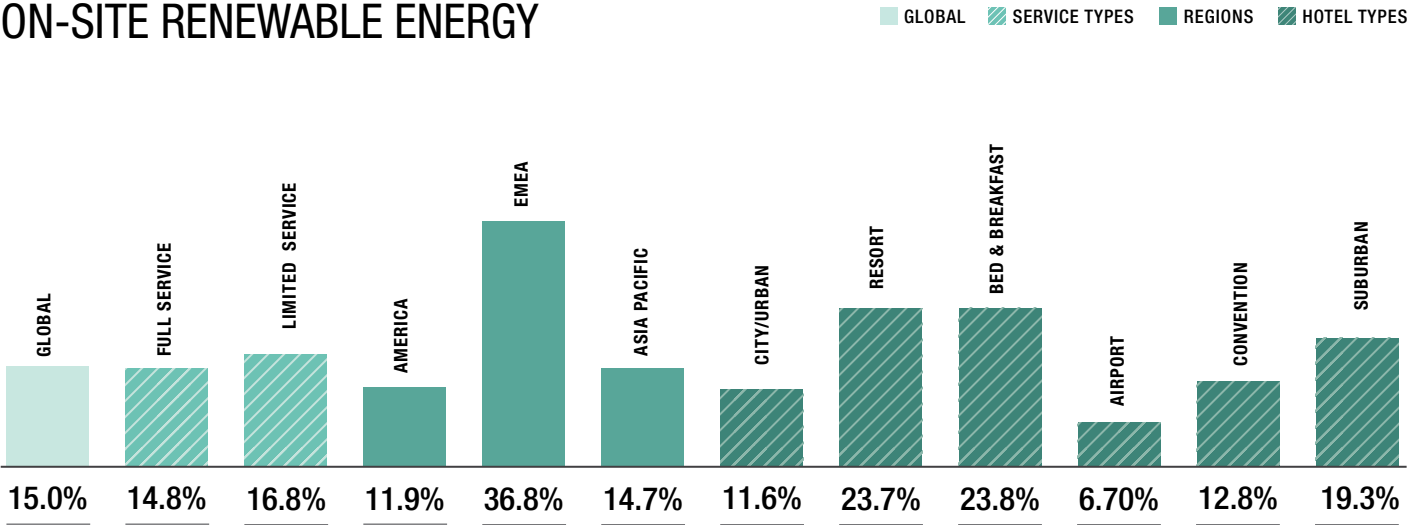


Six Senses Laamu, Maldives

All the systems mentioned above have the potential to significantly decrease energy consumption and a property’s overall carbon footprint. Implementing some type of renewable energy technology can quickly move a property toward zero carbon. Last year, 26 percent indicated generating some of their own power on-site. This year, 15 percent said they do, with most (5 percent) indicating an investment in solar thermal for water or space heating.

“Construction with many windows allows for lots of natural light, reducing need for electrical lighting in most offices and guest villas.”

ON-SITE RENEWABLE ENERGY



Solar Rooftop, ITC Grand Chola, Chennai, India



Complimentary Parking for Electric Vehicles and 50 percent Off Parking Fees for Hybrids,  
**Fairmont Waterfront**, Vancouver, Canada

Twenty-seven percent said they have installed electric vehicle (EV) charging stations and 1 percent plan to do so. Thirty-four percent said they provide preferred parking locations for guests and staff driving fuel efficient vehicles (hybrids, electric vehicles).

Survey participants were asked to describe any programs or initiatives regarding EV usage at their properties. Some said the charging technology was not available in their countries. The following are a few comments from hoteliers:

“We have two spots reserved for electric cars where chargers are installed.”

“We use golf carts on property to transport guests around.”

“Our hotel car is a BMW i3. It is used to shuttle guests to nearby destinations. We also extend complimentary parking for electric vehicles and 50 percent off parking fees for hybrids.”

Finally, survey participants were asked, “Please describe any other innovative practices, building design, or equipment related to energy management that have succeeded in your property.”

#### Here are a few responses:

“Three way and four way light switches are installed all over the property for path lights and stairways and in rooms.”

“Gardens on the roof of overbuilding keeps the room cooler and thus reduces use of AC power.” (Twenty-nine percent of our survey participants said they have a green roof.)”

“We have an Energy Control System for the entire building including meeting rooms and all the exterior lighting.”

“We use a strict PM policy to ensure HVAC units operate at peak performance levels.”



# WASTE MANAGEMENT

As an increasing number of suppliers reach Zero Waste to Landfill or at least talk about pursuing it, that high level of accomplishment is still mostly unheard of in lodging establishments. In fact, some participants in this year's report said they live in communities where access to recycling and composting is still not available.

We asked, "What operational challenges related to waste (i.e. challenges under your control) are the most challenging?" One hotelier wrote: "Having to sort through trash to remove recyclables that guests discard." Another said: "It has been a challenge to collect food waste from banquet events to put in the food digester." Yet another wrote: "To get Coca Cola to sell us glass bottles in order to stop using plastic bottles." Several cited staff training as an ongoing challenge or simply finding the space to store recyclables and material that can be composted.

When asked what they have done to reduce the volume of plastic waste on property, one hotelier said guests are presented with refillable metal drinking bottles. Another said: "We recycle the staff and guest Keurig cups which are then shredded and mixed with concrete at a local plant." One added: "We have china and glassware in our rooms as well as Brita water pitchers in the fridges."

When asked to describe any other innovative practices, building design, or equipment related to waste management, hoteliers provided many responses. Here is one unique answer: "Our program to convert food waste into black soldier fly larvae is innovative. We also crush our glass bottles to make into a fine sand which makes an excellent cement when we need it."



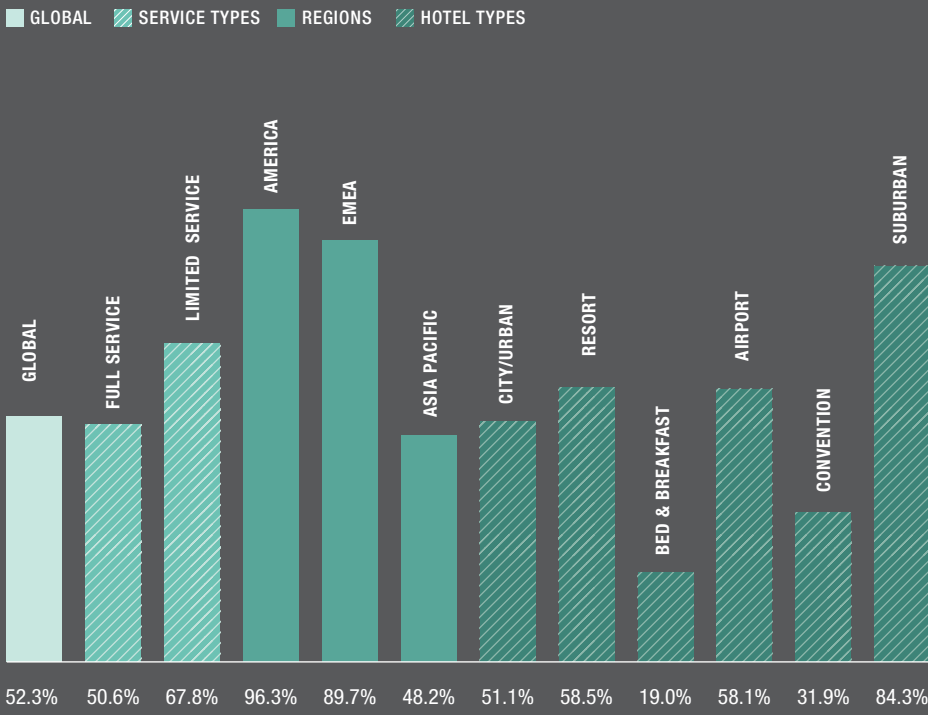
Cement Made by Crushed Glass, **Nikoi Island**, Indonesia



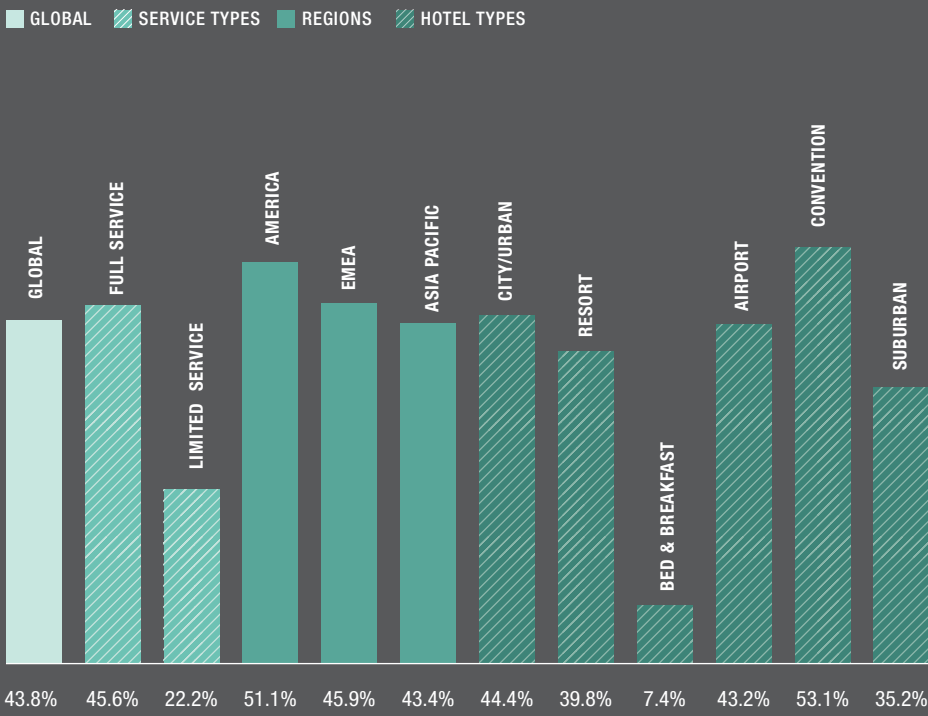
Last year, 41 percent indicated a waste audit had been conducted in the last four years. This year that number dropped to 30 percent. Fifty-five percent said they track the volume of waste and recyclables leaving their facility including waste diversion rate (amount of waste diverted from landfill) on at least a quarterly basis. Last year that percentage was 59 percent.

Fifty-two percent said they practice recycling in all common areas of the property. In the Americas that number was 96 percent. Only 48 percent responding from the Asia-Pacific region indicated they practice recycling in all common areas. The materials most commonly recycled: cardboard, office paper and plastics. Just 44 percent said they place recycling containers in guestrooms—almost identical to last year’s 43 percent. Four percent said they plan on adding the containers.

RECYCLING IN COMMON AREAS



RECYCLING BINS IN GUESTROOMS



Disposable plates, bowls and cutlery can fill up waste containers very quickly—especially at breakfast. We asked, “What percentage of the food and beverage facilities use reusable place service (cutlery, plates, cups) during meals, including breakfast? Forty-nine percent said at least 90 percent of facilities use reusable food service ware. Sixty-eight percent recycle kitchen grease and 41 percent said food waste is composted on-site or externally. Twelve percent said they have an on-site organics liquefier or waste digester.



Bucuti and Tara Suites, Aruba, USA

“ All damaged linen are re-purposed to either laundry bags, gym towels or donated to foundations.”

Many hotels have transitioned away from newspaper delivery in recent years. Last year, 82 percent said they do not deliver newspapers to guestrooms. This year: 80 percent.

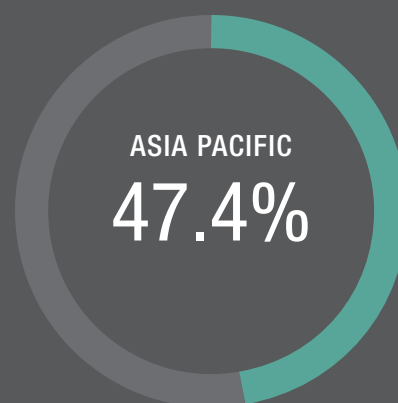
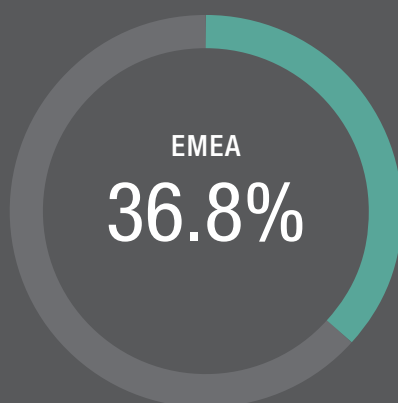
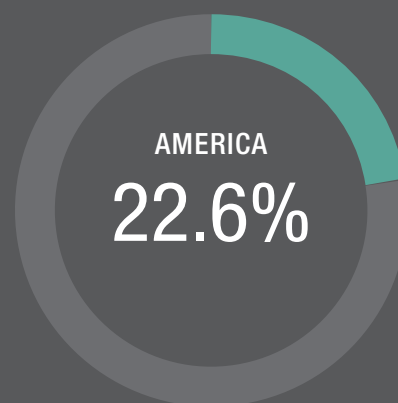
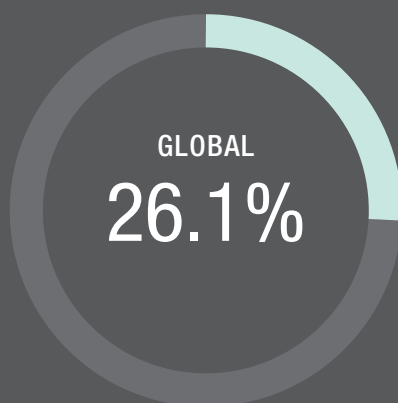
One easy way to reduce plastic waste is by implementing dispensers in guestroom bathrooms for soap, shampoo and conditioner. As effective as it is at reducing waste, many hoteliers still have not been sold on the idea of dispensers—especially those running more upscale properties. This year 29 percent indicated that at least 90 percent of their guestrooms have dispensers.

Just 31 percent have installed hand dryers in public restrooms and, as a result, eliminated paper towels. Twenty-six percent donate excess food to community kitchens or similar programs.

This year we asked, “Do you recover waste heat for reuse?” Eighteen percent said yes, with most (6 percent) indicating it happens in the laundry.

## DONATIONS — EXCESS FOOD

■ GLOBAL ■ REGIONS

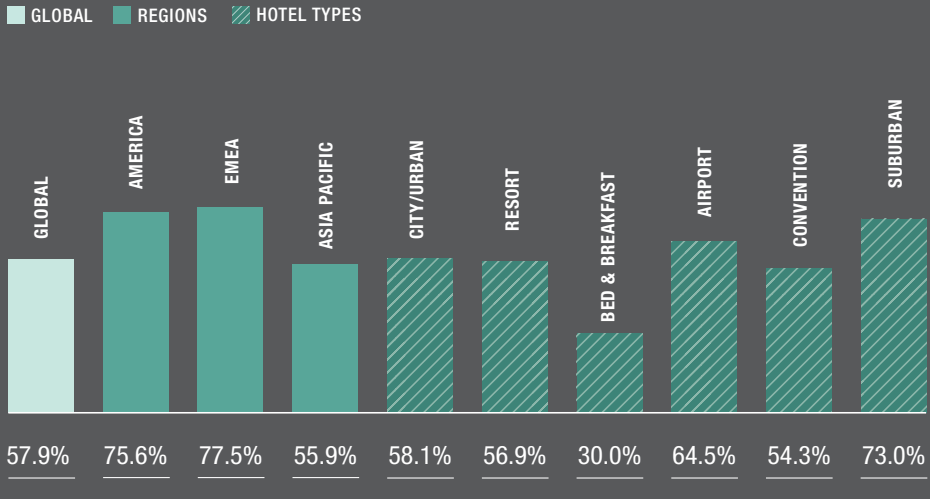


# WATER CONSERVATION

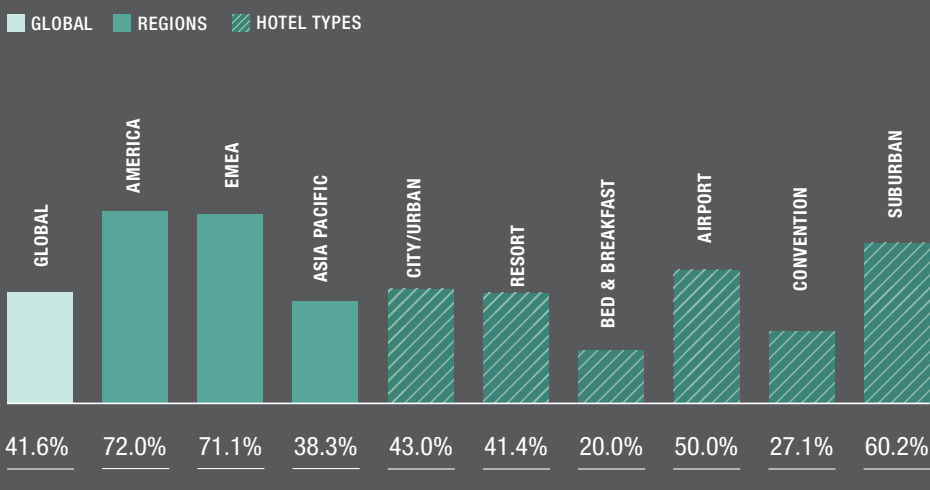
In the midst of drought in many regions of the world, innovations in technology have made it easier to conserve and measure water in recent years. Smart irrigation, gray water reuse systems and submeters come to mind. What is considered the low-hanging fruit of water conservation—low-flow fixtures—remain a high priority for hotel owners around the globe, our survey shows.

Seventy-one percent of respondents said at least 75 percent of toilets are considered low-flow—under 1.6 gallons/6 liters per flush or dual-flush (0.8 to 1.6 gallons/3 to 6 liters per flush). Fifty-seven percent said at least 75 percent of guestroom faucets have aerators (1.5 gallons/5.7 liters per minute or less). Fifty-nine percent said guestroom showerhead fixtures are low-flow (2.0 or less gallons/7.6 liters per minute) in at least 75 percent of rooms.

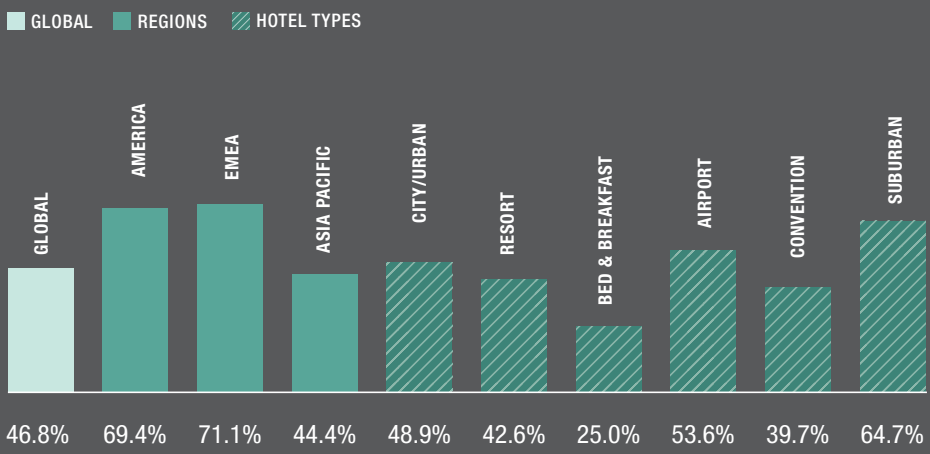
## 90%+ LOW FLOW TOILETS



## 90%+ EFFICIENT FAUCETS



## 90%+ EFFICIENT SHOWERHEADS



Last year, 43 percent said they capture rainwater for reuse. This year that percentage was just 15 percent. We asked hoteliers if their properties reuse gray water. Twenty-three percent said they do. Last year, 69 percent said they did. Explanations of such variations from year to year are difficult to pin down. It could just come down to the sample of respondents being significantly different.



Cistern Tank Used for Capturing Rain Water, **Harbor Beach Marriott Resort & Spa**, Florida, USA





Trickle Irrigation System with More Than 900 Plants, **Palo Santo Boutique Hotel**, Buenos Aires, Argentina

When asked if native or drought-tolerant landscaping is used to reduce irrigation needs, 64 percent said yes (75 percent in 2016).

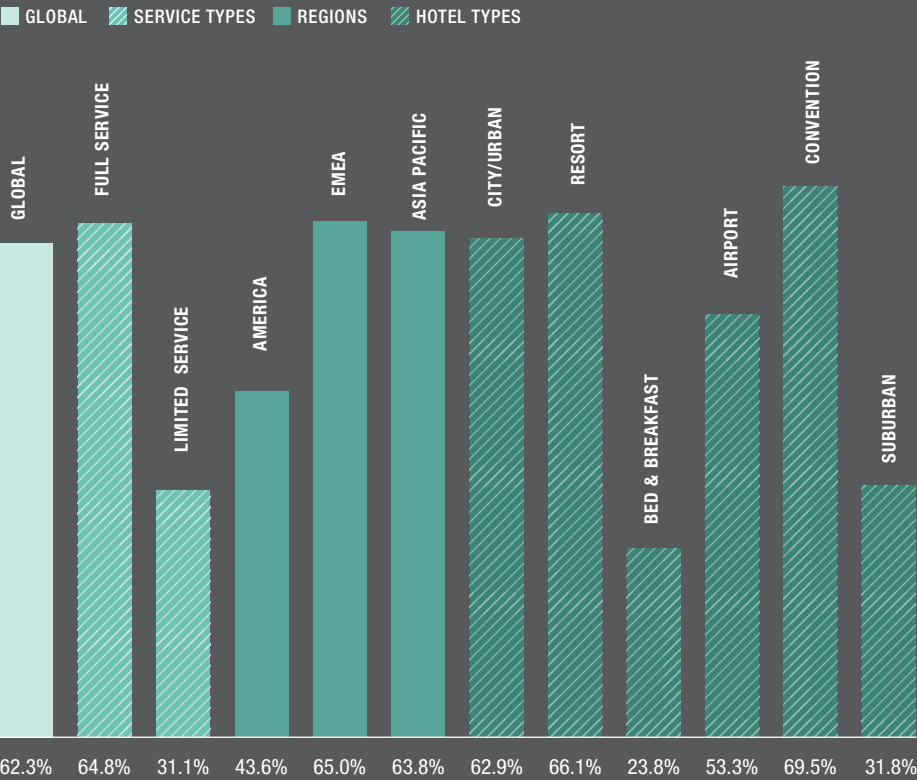
Leaks can go undetected for months and significantly impact costs. We asked hoteliers, “Has the property installed a leak detection system for water piping or toilet tanks?” Just 21 percent said yes. That is up from 18 percent last year.

Twenty-four percent said they use automatic sprinkler systems equipped with moisture sensors to prevent watering during or after rain. That is down from 35 percent last year.

As reported on Green Lodging News many times, the kitchen is often a source for poor water efficiency—faucets and warewashers come to mind. Forty-seven percent said they use pre-rinse spray valves. That number is almost identical to last year’s 45 percent.

Sixty-two percent said they submeter in various areas of the property. That is up from 50 percent last year. The most common area for submetering is the food and beverage facility where 55 percent said they submeter.

WATER SUB-METERING



We asked hoteliers to describe any other innovative practices, building design, or equipment related to water management that they have put in place.

Here are a few of their responses:

“ We have only dry composting toilets that use no water. Roof water is collected off of several buildings and used for urinal flushing and hand wash. We have several grey water systems.”

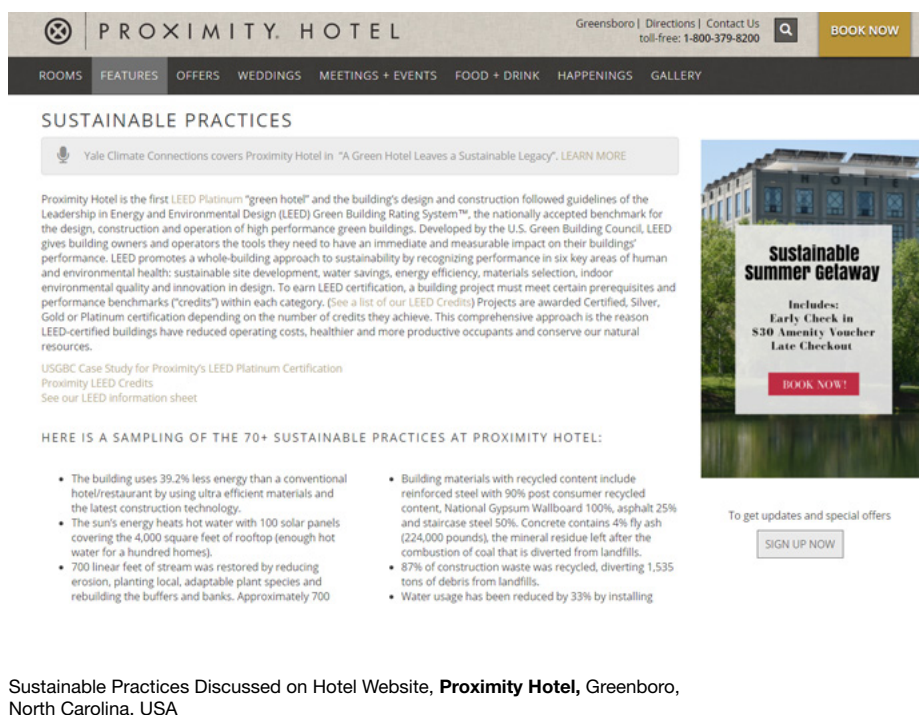
“ We have a card `A Thought About Our Ecology` in all guestrooms to encourage and educate on reducing water consumption.”

“ We have a water cooled ice machine. I was able to capture the water after it cooled the coils in the ice machine (which is now very warm water) and deposit it into the swimming pool. This not only helps reduce the amount of water consumption, but also helps heat the pool.”

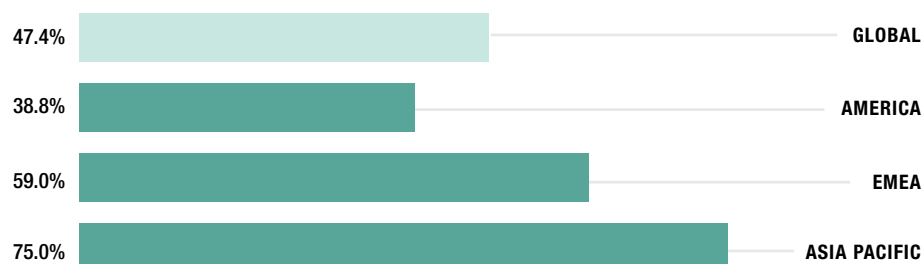


Making “noise” about your sustainability efforts—in-house with staff and externally with potential guests, meeting planners and other stakeholders is an important part of any successful sustainability strategy. We found, however, that oftentimes hoteliers are rather silent about their green initiatives.

For this year's report we asked, "Does the property have space on its website dedicated to sharing its green practices?" Only about half (51 percent) said they do. Last year 48 percent indicated they allocate space. What about the guestroom? Are green initiatives communicated in the Guest Services Directory or elsewhere? This year 73 percent said yes. Last year: 76 percent.



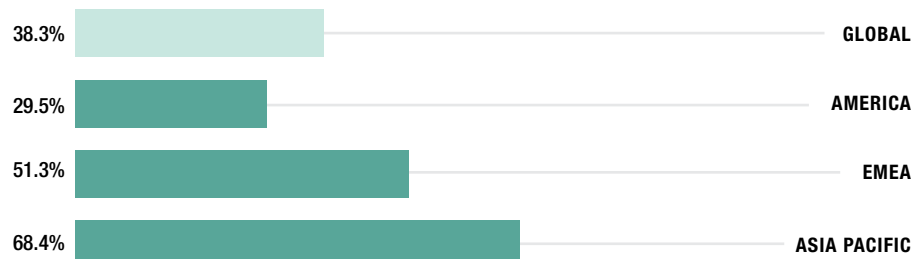
## GLOBAL REGIONS



Reaching out to the media can help create a lot of buzz about an on-property or community initiative. We asked, “Has your property ever issued a press release highlighting a green investment or initiative?” Forty-seven percent said yes. Last year: 54 percent.

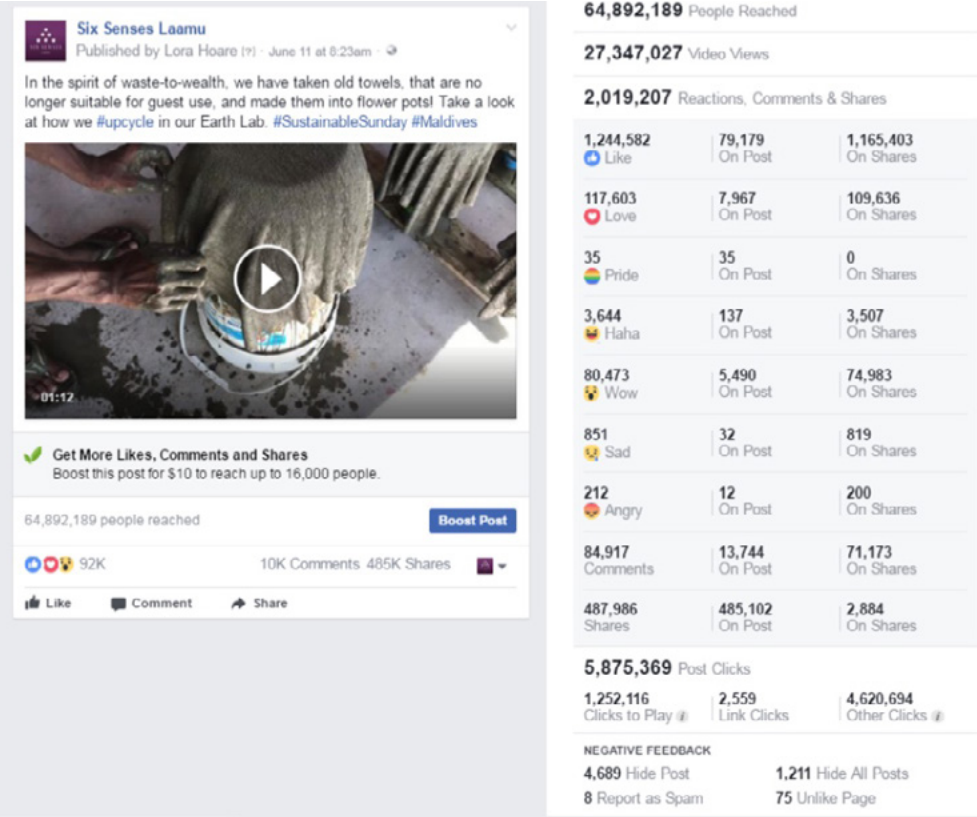
Oftentimes, especially at larger properties with more active sustainability programs, tours are offered to guests and the public that highlight environmental improvement projects. This year, 38 percent of respondents said they offer such tours. Last year: 37 percent.

■ GLOBAL ■ REGIONS



Documentation of a property or company’s sustainability plan of action can help keep everyone “on the same page” when it comes to proper procedures. Documentation is also a critical part of training new hires and existing staff. In our survey we asked, “Does your property have a written sustainability policy/set of policies in place?” Seventy-four percent said yes. Last year: 72 percent.

One respondent representing a property in the Maldives said they share success stories on social media, internal communications and press releases.



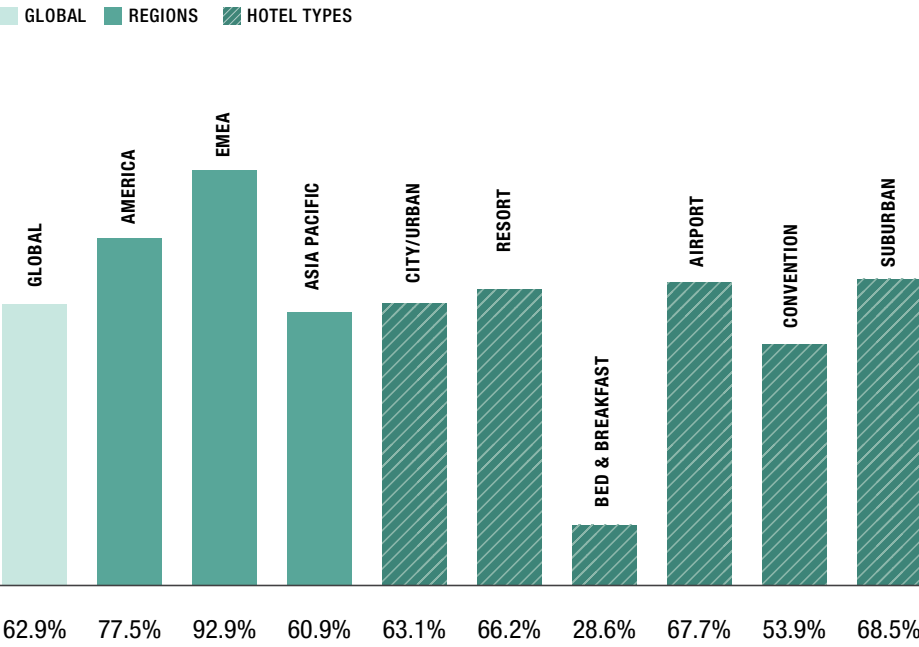
Successful Stories Shared on Social Media, **Six Senses Laamu**, Maldives

# STAFF INVOLVEMENT

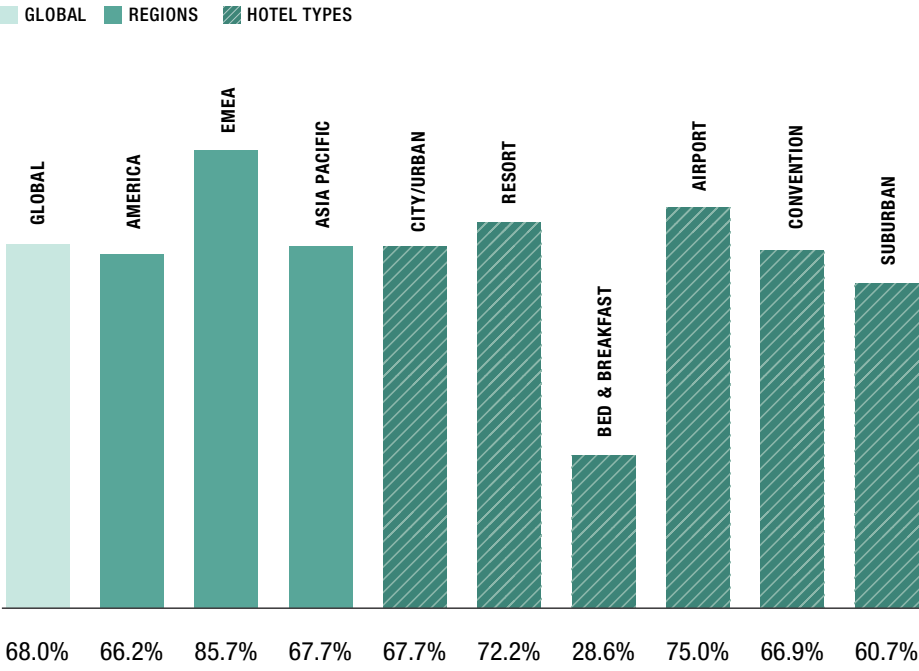
Given the frequency of employee and management churn in the lodging industry, maintaining a sustainability program’s momentum can often be a challenge. It is not just staff turnover that can put the brakes on a green initiative, however. This year we asked our readers: “What are your property’s greatest challenges around sustainability and staff involvement?” The following are just a few of the answers supplied: “Money and time.” “Education.” “Communication is always a challenge.” “The lack of total buy-in from upper management.” Some of the answers had to do with more practical, operational matters: “Space on the housekeeping carts to sort recyclables from garbage.” “Lately, we have had a monitoring problem, meaning data that we once kept is no longer being collected in the same way.”

Similar to last year’s results, when 64 percent of respondents said their properties have a sustainability coordinator or green champion, this year 63 percent said they do. This year, 68 percent said they have a green team or sustainability task force—last year it was 69 percent. In the Americas, 77 percent said they have a green champion. In Asia Pacific: 61 percent. In the Americas, 66 percent said they have a green team or sustainability task force. In Asia Pacific: 68 percent. Most said their green teams meet monthly (35 percent) followed by quarterly (26 percent).

## GREEN CHAMPION

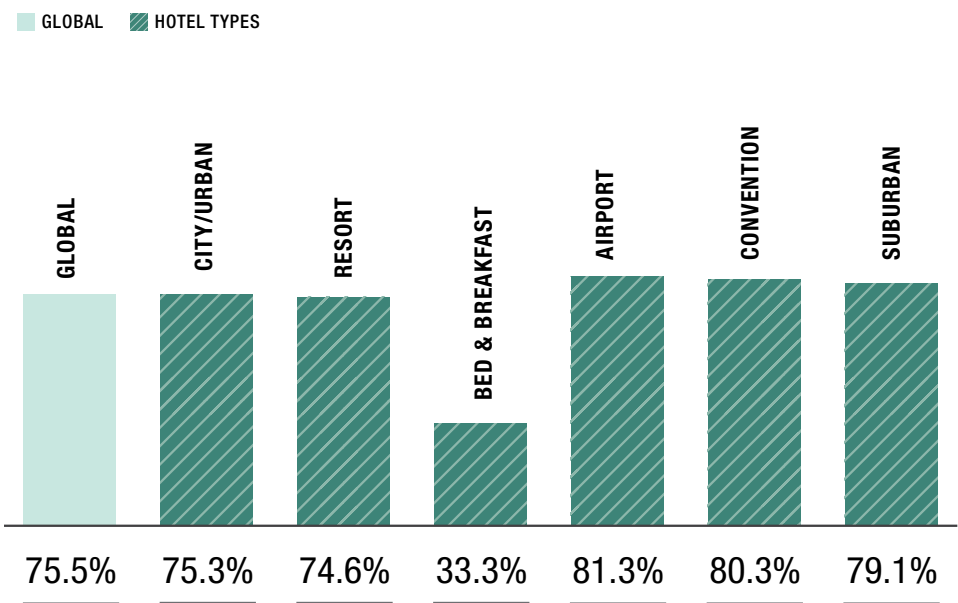


## GREEN TEAM

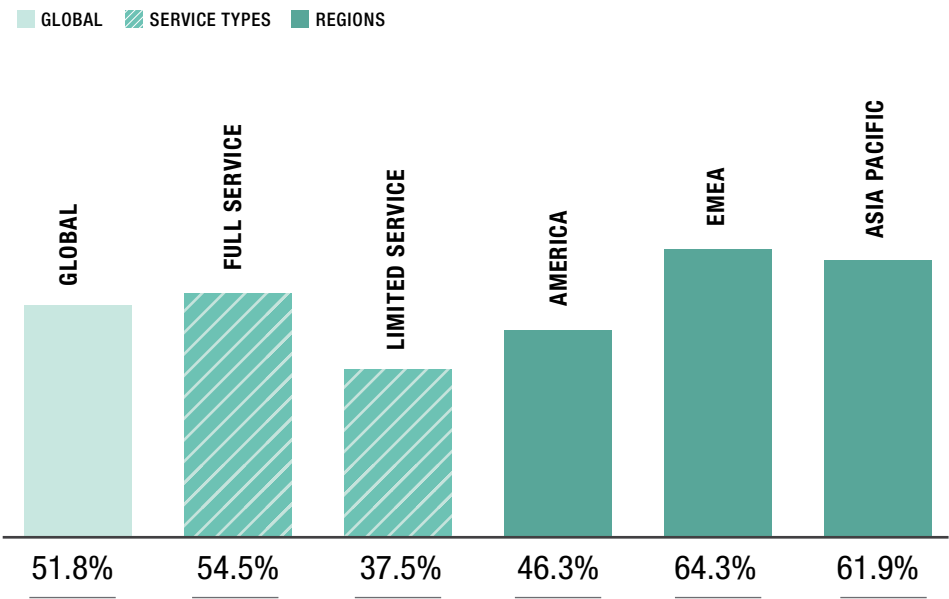


Ongoing training is critical to the success of any sustainability initiative. When asked if staff training on understanding and implementing green practices is given at least once a year, 76 percent said yes. Any lodging initiative can be hampered by lack of funds and that is certainly true when it comes to sustainability. Just 52 percent said the sustainability coordinator or green team has a budget to implement green initiatives.

STAFF TRAINING



GREEN TEAM BUDGET



Key to any successful green hotel is its ability to capture good ideas that contribute to continuous improvement. We asked, “Has your property implemented an employee comment/suggestion collection process for sustainability-related issues?” Just 53 percent said yes. That is down from the 70 percent reported in last year’s survey.

Just as important as gathering employee input is celebrating successes—whether it is a banquet, extra time off, or mention in a company newsletter. This year we asked, “Are staff members who go above and beyond with regards to sustainability recognized through awards or other recognition?” Fifty-nine percent said yes.



Eight years ago, Green Lodging News reported on the Hyatt Regency Cambridge in Massachusetts and the success it had asking employees to sign a “Commitment to the Environment” letter. The act of signing a letter increased participation in programs such as recycling. This year we asked, “Are employees asked to sign a commitment letter, demonstrating their commitment to participating in sustainability initiatives?” Just 26 percent of respondents said they do this — up from 22 percent last year.



Annual Celebration for Rewarding Employees, **Cactus Hotels**, Crete Island, Greece



Staff Involvement in Pancake Breakfast for the Local Community, **Huntingdon Manor Hotel**, Victoria, Canada



# COMMUNITY INVOLVEMENT

Green Lodging News frequently hears from hotels and hotel companies regarding the good will they bring to their communities—whether through volunteer initiatives or cash donations. In June, for example, we heard from The Naples Hotel Group (Naples, Fla.) regarding their donation of furniture to Habitat for Humanity. In late July, Las Vegas Sands Corp. and social enterprise Clean the World announced a first-of-its-kind service in Las Vegas to help homeless people. The Sands Cares Fresh Start Mobile Showers Powered by Clean the World is a traveling hygiene unit that visits locations serving the homeless to provide showers, hygiene supplies and other resources.

In our survey this year we asked, “Describe the most innovative philanthropic or community initiative carried out in the past year.” Here are four examples:

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“The administrator has started a local youth eco-club and a sustainable community-based Ecological Tourism Assn.”

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“Raising money for Autism Speaks, we participated in a “light it up blue” campaign and provided information to guests about Autism.”

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Student Chefs at the **Fairmont Waterfront**, Vancouver, Canada

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“We run the local maternity clinic which is free for the local community and is now used by the whole island as it is the best on the island.”

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“Each year we work with a group of grade 6 and 7 students from an inner city school to provide them an opportunity to fund raise for a year-end trip and ongoing school programs. We initially bring the students to the hotel and teach them how to set tables, serve and cook. The students then take this knowledge and host a gala event at their school to raise funds. The hotel donates all of the necessary equipment, food and experienced staff to make sure it is a successful event.”

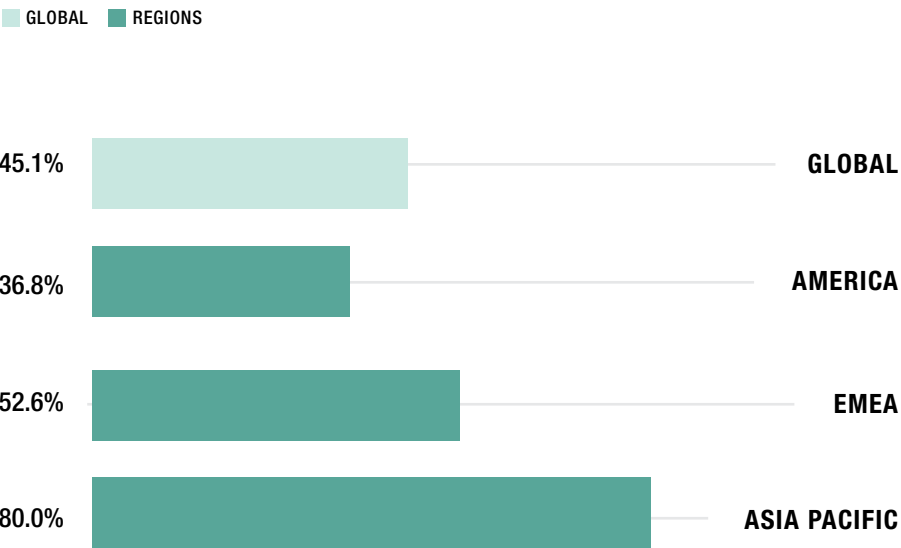
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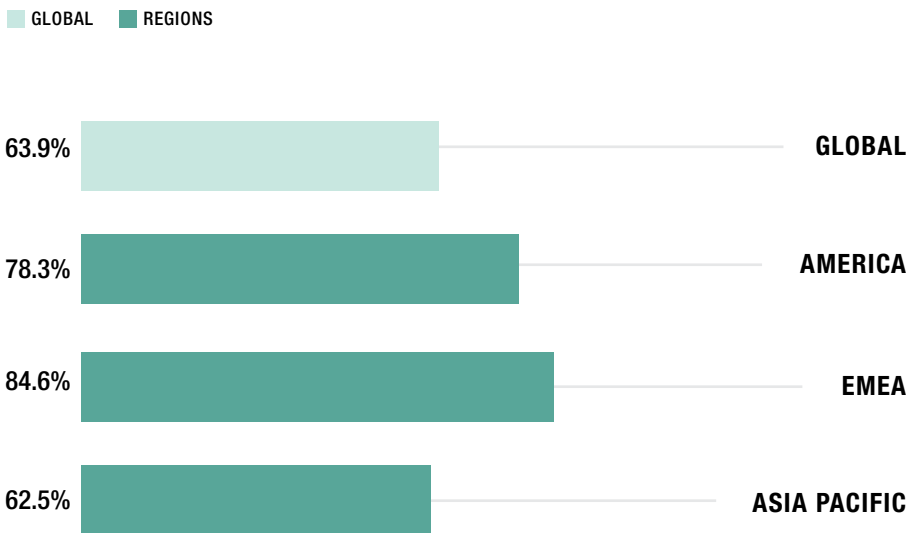
Free Local Maternity Clinic for the Community,  
**Diamonds La Gemma dell'Est**, Zanzibar, Tanzania

We asked hoteliers, “Has the property ever hosted a community or guest event highlighting your facility’s environmentally sustainable or socially responsible practices?” Forty-five percent said yes.

HOSTED EVENTS  
HIGHLIGHTING PRACTICES



EMPLOYEE VOLUNTEERING  
OPPORTUNITIES DURING WORK HOURS



Volunteering time off hours is one thing but it takes extra management commitment to allow volunteer activities during the work day. We asked, “Are employees given the opportunity to volunteer their time and services towards various environmental or social community development events and campaigns during regular working hours? (i.e. education, training, health, or sanitation?)” Sixty-four percent said yes.

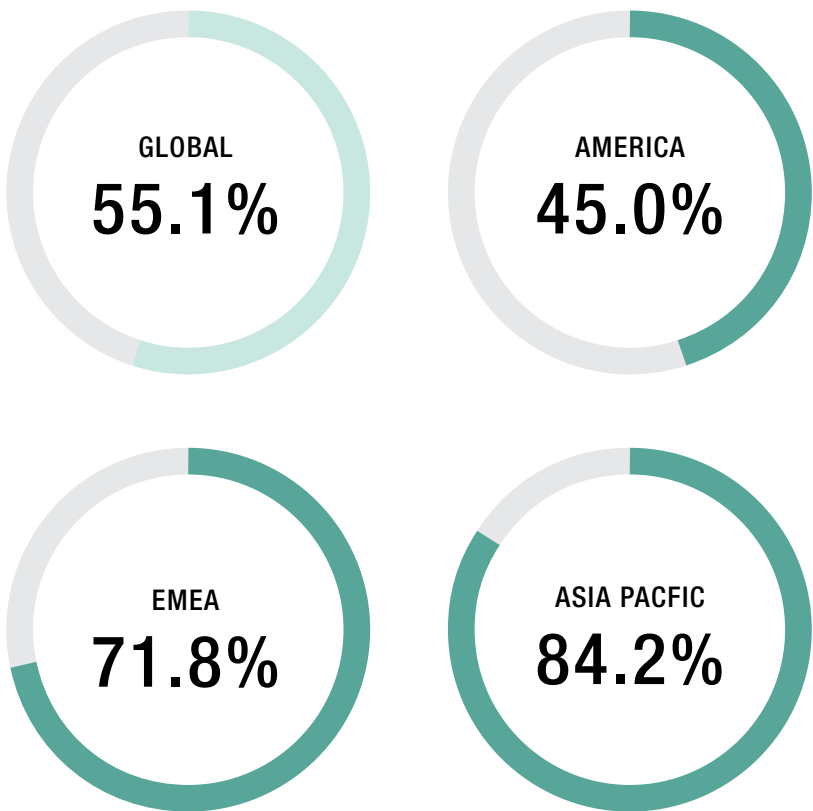




Fund Raising Program, “Trees of Hope”, **Fairmont Le Chateau Montebello**, Montebello, Canada

LOCAL HERITAGE OFFERINGS  
COMMUNICATED

GLOBAL REGIONS



The location of one’s property often lends itself to wanting to educate guests about the nature surrounding it. We asked, “Are guests educated (information, interpretation and appropriate behavior) about local ecosystems, culture, hiking trails, heritage sites, parks, native species, etc. while at your facility?” Fifty-five percent said yes, always. When asked if such information is given only upon request, 32 percent said yes.

# HEALTH & WELLNESS

According to the Global Wellness Institute, the global wellness economy is now worth \$3.7 trillion, represents 5 percent of global economic input, and is almost half the size of all global health expenditures. For the first time in the Green Lodging Trends Report survey, we asked some questions specific to wellness in hotels. Of course, wellness encompasses many aspects of the hotel experience—pool, spa, fitness, employee benefits, etc.

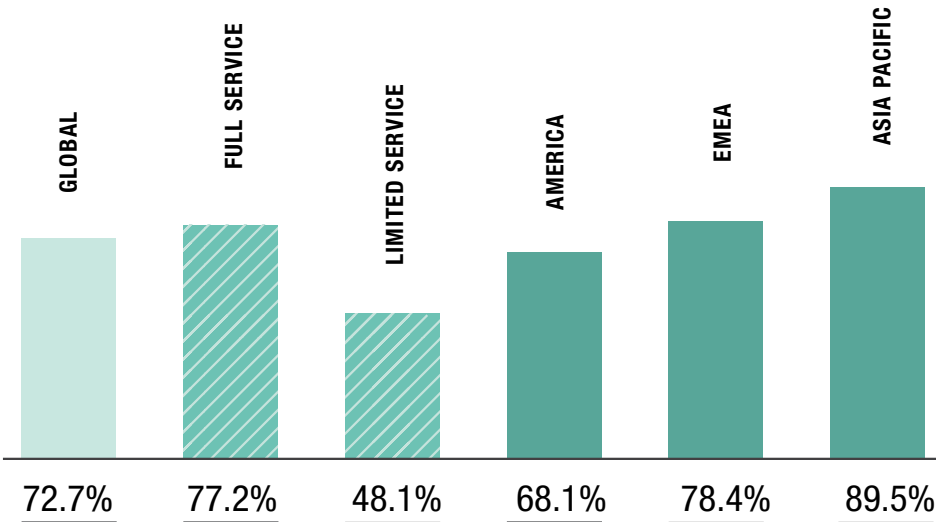
We asked hoteliers, “Does your property’s swimming pool incorporate a saline/salt water system for generating chlorine?” Twenty-five percent said yes. Because they have lower chlorine levels, salt water pools are much gentler on the eyes and skin.



Natural Saline Pool, **Element Suzhou**, Suzhou, China

## PARENTAL LEAVE AND CARE TAKING BENEFITS

GLOBAL SERVICE TYPES REGIONS

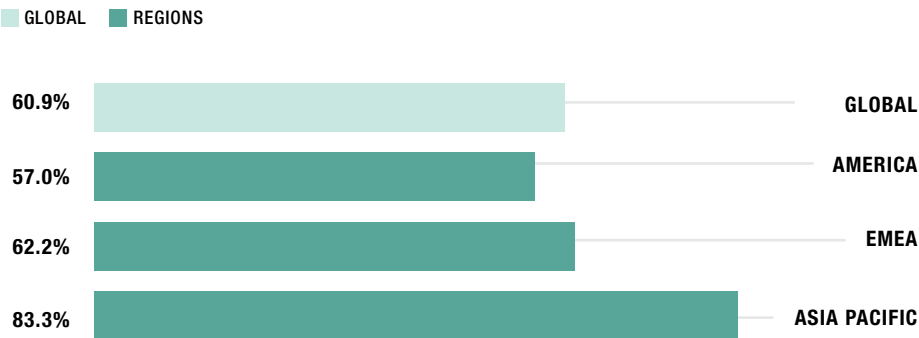


Guestroom soap can include many kinds of chemicals that are unhealthy for guests. Fortunately, most amenity companies today offer eco-friendly versions. We asked hoteliers: “Do you offer your guests eco-friendly amenities (soap, shampoo, lotion)?” Sixty-two percent said yes.

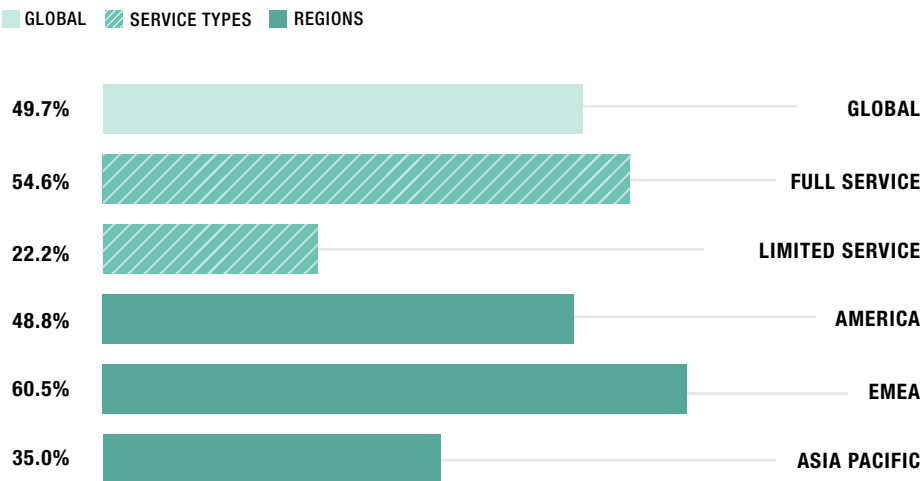
Seventy-three percent said they offer parental leave and care taking benefits. Parental leave has been a hot topic in the past year. In November 2016, for example, Hilton announced its newest family benefit, adoption assistance, offering hourly and salaried Team Members reimbursement for expenses incurred while adopting children. Also in November 2016, Choice Hotels International announced new expanded parental leave and caretaking benefits.

Sixty-one percent said they target, in their marketing, those travelers who are concerned about health and wellness.

MARKETING

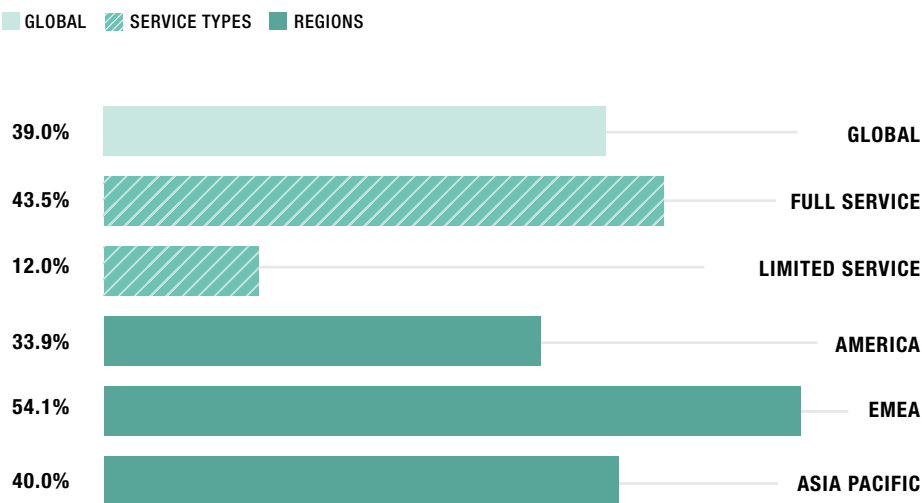


HUMAN TRAFFICKING



For the first time, we asked about human trafficking and 50 percent said they have a formal action plan in place for their property. Just 40 percent said they have a program in place to monitor operations and evaluate suppliers in human rights areas including modern slavery.

EVALUATE SUPPLIERS IN HUMAN RIGHTS AREAS





When asked to provide an example of a program launched in the last year to promote employee and/or guest wellness, hoteliers provided many examples.

Here are some examples:

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**“Tai Chi and Zumba classes for guests.”**

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**“We have a wellness program incorporated with our Medical Aid funds which is held twice a year for staff only.”**

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**“We offered a bonus to any staff who quit smoking for six months.”**

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The hotel has a Wellness Committee that is committed to promoting wellness activities within the hotel and they often organize events. Most recently the committee organized a skating event at a nearby ice rink and in the next few weeks they will be putting on their annual Wellness Fair that will see many different suppliers brought into the hotel to promote wellness.

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Bonus Offered to Staff Who Quit Smoking, **Best Western Plus Kamloops Hotel**, Kamloops, Canada

Team members paid for three months while having a child. Spouse is given two weeks with pay.

Indoor air quality also affects guests and employees' health. In this year's survey, we attempted to get hoteliers to be specific about their definition of an "allergy-friendly room." These types of rooms are becoming more common and at least one hotel—the Ellis Hotel in Atlanta—even offers a Fresh Air Floor, Pet-Friendly Floor and Wellness Room in the same building. Our survey question, "If you have 'allergy-friendly' rooms for guests, how are they different than other rooms in your property?", provided a little more

clarity about what hoteliers believe "allergy-friendly" means but there are still many varying opinions. Many said they remove feather free items. One hotelier said: "Rooms are cleaned with no-odor products when requested." Another said: "All our rooms are painted with no VOC paint and equipped with dehumidifiers and air purifiers—making them all allergy-free rooms." Another said: "Instead of carpet we have linoleum on the floor." Not one respondent touched on all of the aspects of an allergy-friendly room—including shower filters, green cleaning products, soaps, shampoos, etc. Some thought an allergy-friendly room was one where pets are not allowed. Thirty-five percent did say they offer portable air purifiers in guestrooms upon request, or in designated rooms for guests with allergies or chemical sensitivities.



Pure Allergy-Friendly Rooms, **Seaport Hotel & World Trade Center**, Boston, USA

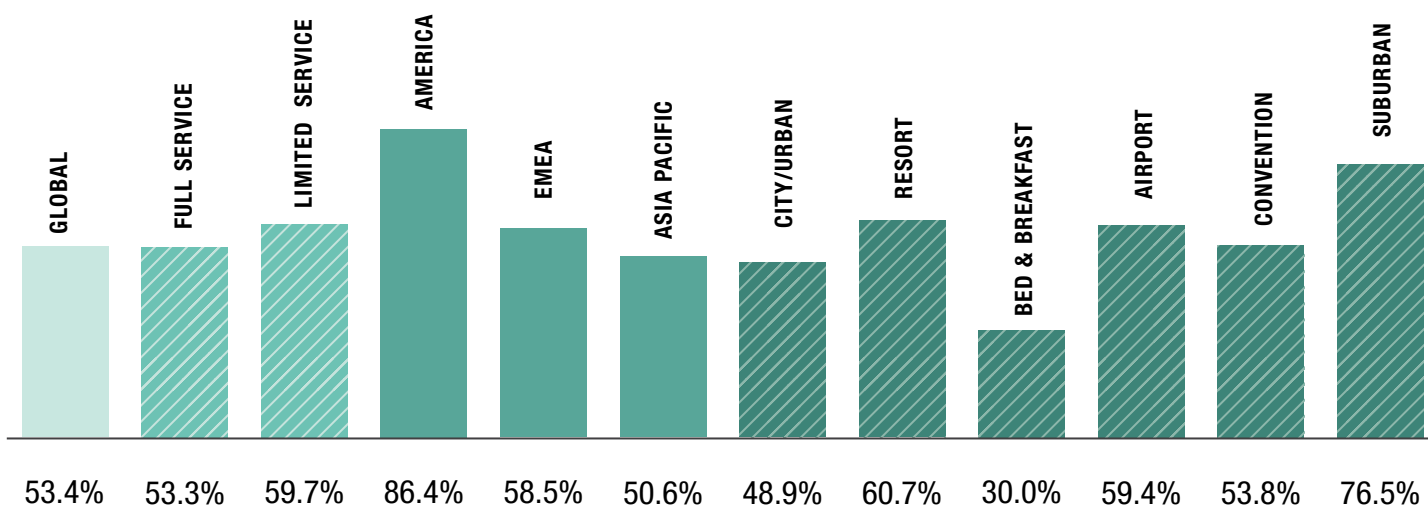
In our first survey last year, 65 percent of respondents said they offer a 100 percent nonsmoking environment for guests (90 percent in the Americas and just 16 percent in Asia Pacific). In this year's survey, 53 percent said they offer a 100 percent nonsmoking environment for guests. In the Americas, that number was 86.4 percent. In Asia Pacific: a significant increase to 50 percent.

Earlier this year, Choice Hotels International announced that its Comfort Inn brand has joined Comfort Suites in offering guests 100 percent smoke-free rooms at its more than 1,800 franchised hotels across the United States and Canada. Comfort is now the largest hotel brand to allow travelers to enjoy a smoke-free stay, the company says.

Hoteliers this year were asked if HVAC filters are routinely checked and changed. Almost all—99.5 percent—said yes.

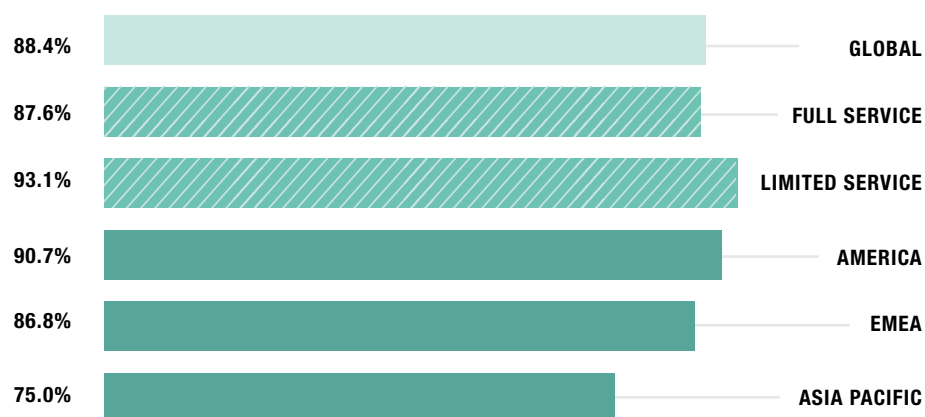
## 100 PERCENT NON-SMOKING

GLOBAL SERVICE TYPES REGIONS HOTEL TYPES



## LOW VOC OR VOC FREE PAINTS

GLOBAL SERVICE TYPES REGIONS



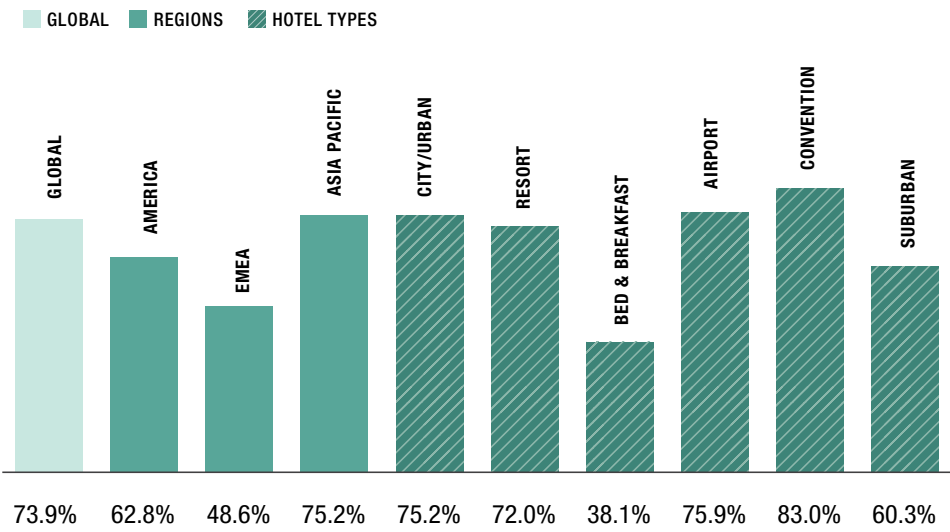
Earlier this year, in Niles, Mich, a teenage boy died and 13 others were injured by a carbon monoxide leak. Even as this invisible gas kills each year, detectors are still not mandatory in many places. This year, 61 percent of all respondents said they regularly conduct tests for carbon monoxide and radon. The good news is that is up from 52 percent last year. Those who do conduct tests mostly do so on an annual basis.

Off-gassing, the release of a chemical, especially a harmful one, in the form of a gas, is a major topic of discussion when it comes to green building and renovation. This year we asked, "Are low- or no-VOC paints, finishes and other items specified for renovations or additions?" Sixty-two percent said always and 27 percent said sometimes.

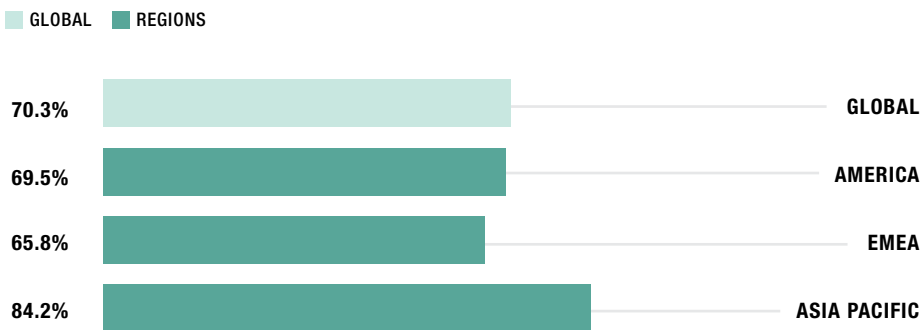
Keeping hotel properties toxin free is important, especially with so many travelers today experiencing breathing difficulties or sensitivities to certain chemicals. Of course, it is also important that housekeepers and other maintenance personnel not be consistently exposed to toxins. Seventy-four percent of those participating in our report said at least 50 percent of the products used for cleaning are green certified by a third party. Five percent mentioned GreenGuard certification, 11 percent Green Seal, and 19 percent Environmental Choice EcoLogo.

Seventy percent said they use environmentally friendly alternatives to pesticides/insecticides in guestrooms. Eighty-seven percent said integrated pest management techniques are employed throughout the property. That is up from 78 percent last year.

>50% GREEN CLEANING PRODUCTS



ENVIRONMENTALLY FRIENDLY PESTICIDE / INSECTICIDE ALTERNATIVES IN GUESTROOMS



INTEGRATED PEST MANAGEMENT PROGRAM

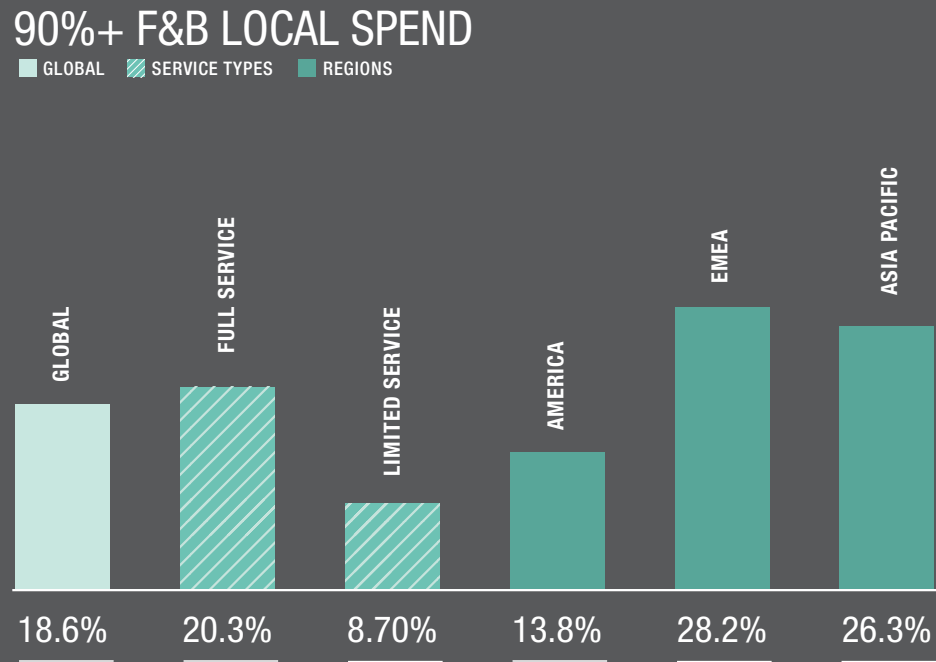


# BACK OF HOUSE

At the very end of 2016, The National Restaurant Association (NRA) released the results of its annual survey of American Culinary Federation members. Interest in sustainable food and beverage offerings remained strong. According to the NRA's annual "What's Hot" list, the top 10 current concept trends include the following:

Food and beverage is just one of the many areas of operations where commitment to sustainable procurement has gotten stronger in recent years. We asked, "What percentage of your F&B purchases (by spend) are from local providers?" Sixty-eight percent said at least 50 percent. Fifty-seven percent said they have a sustainable seafood purchasing policy. Last year 62 percent said they did.

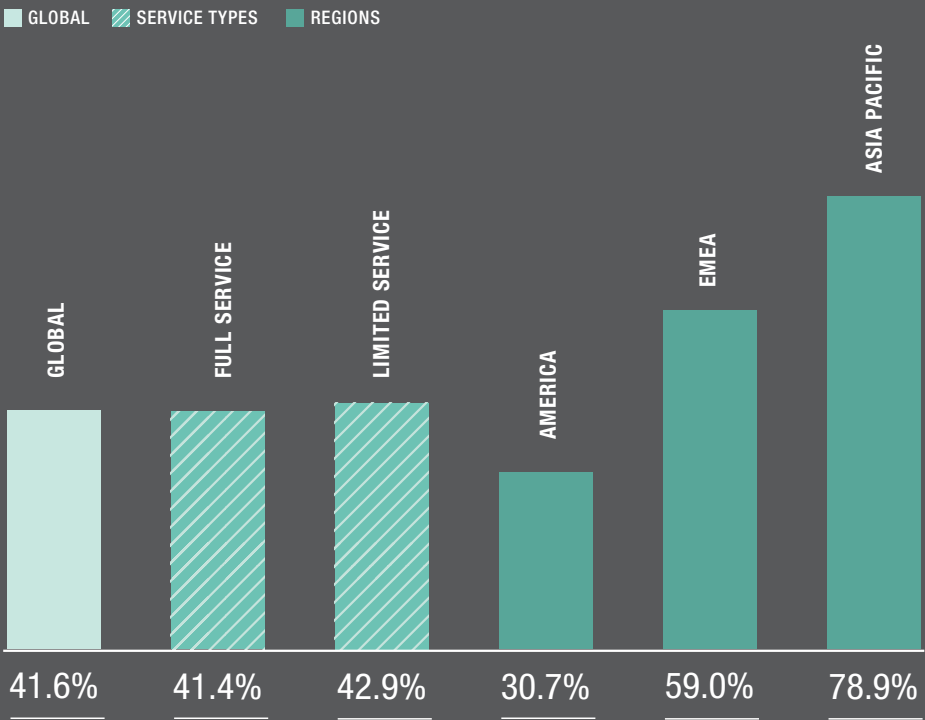
01	Hyper-local sourcing (e.g. restaurant gardens, on-site beer brewing, house-made items)
02	Chef-driven fast-casual concepts
03	Natural ingredients/clean menus
04	Environmental sustainability
05	Locally sourced produce
06	Locally sourced meat and seafood
07	Food waste reduction
08	Meal kits (e.g. pre-measured/prepped raw ingredients for home preparation)
09	Simplicity/back to basics
10	Nutrition. Among the top 20 food trends this year, sustainable seafood came in at No. 5.



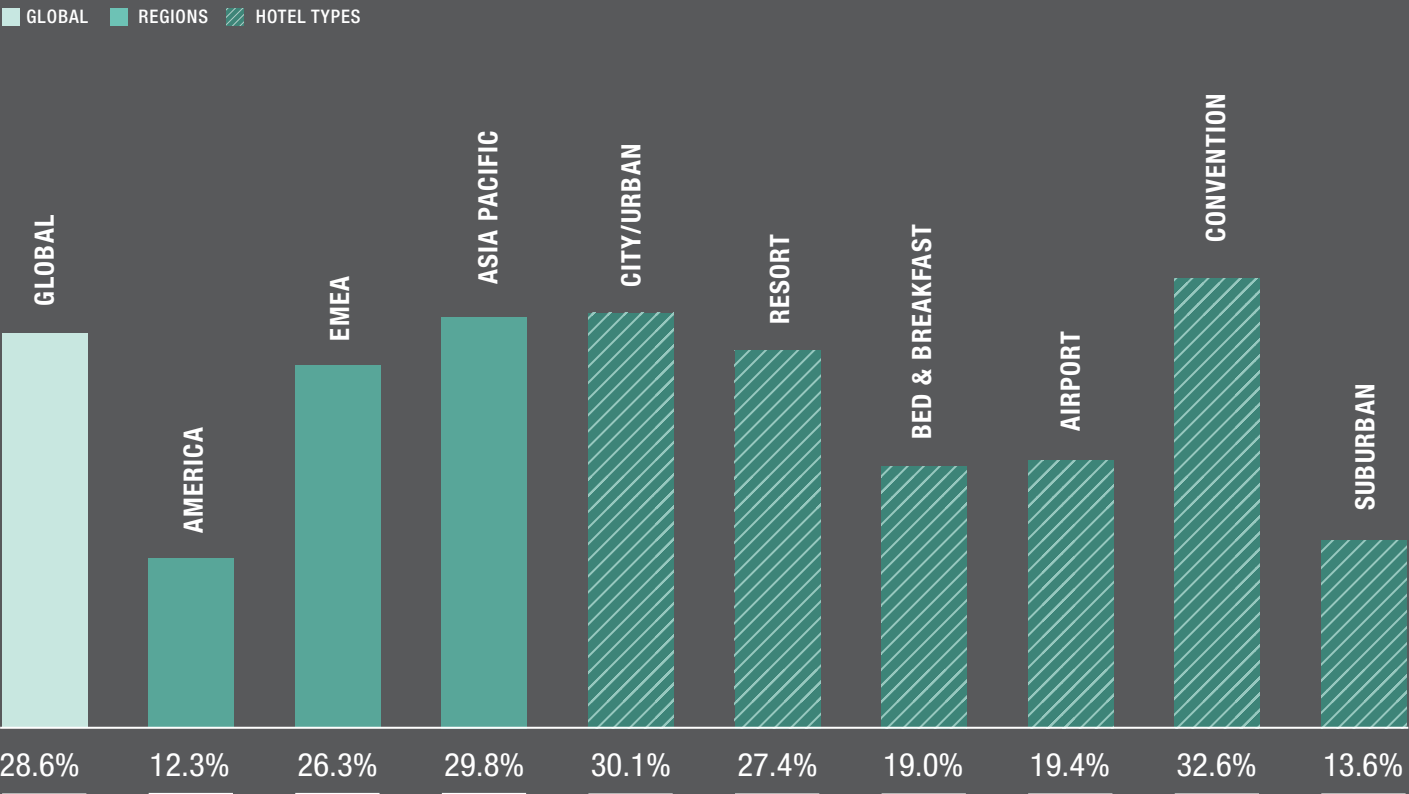


Whether on the roof, in a container or elsewhere on the property, chefs are increasingly growing their own herbs and vegetables. Forty-two percent of survey respondents said they now do this. Eight percent said there is a vegetable and/or herb garden on the roof. Three percent said there is an apiary (beekeeping) on the roof. Eighty-five percent now offer vegetarian options in the restaurant.

FOOD GROWN ON-SITE



GREEN ROOF

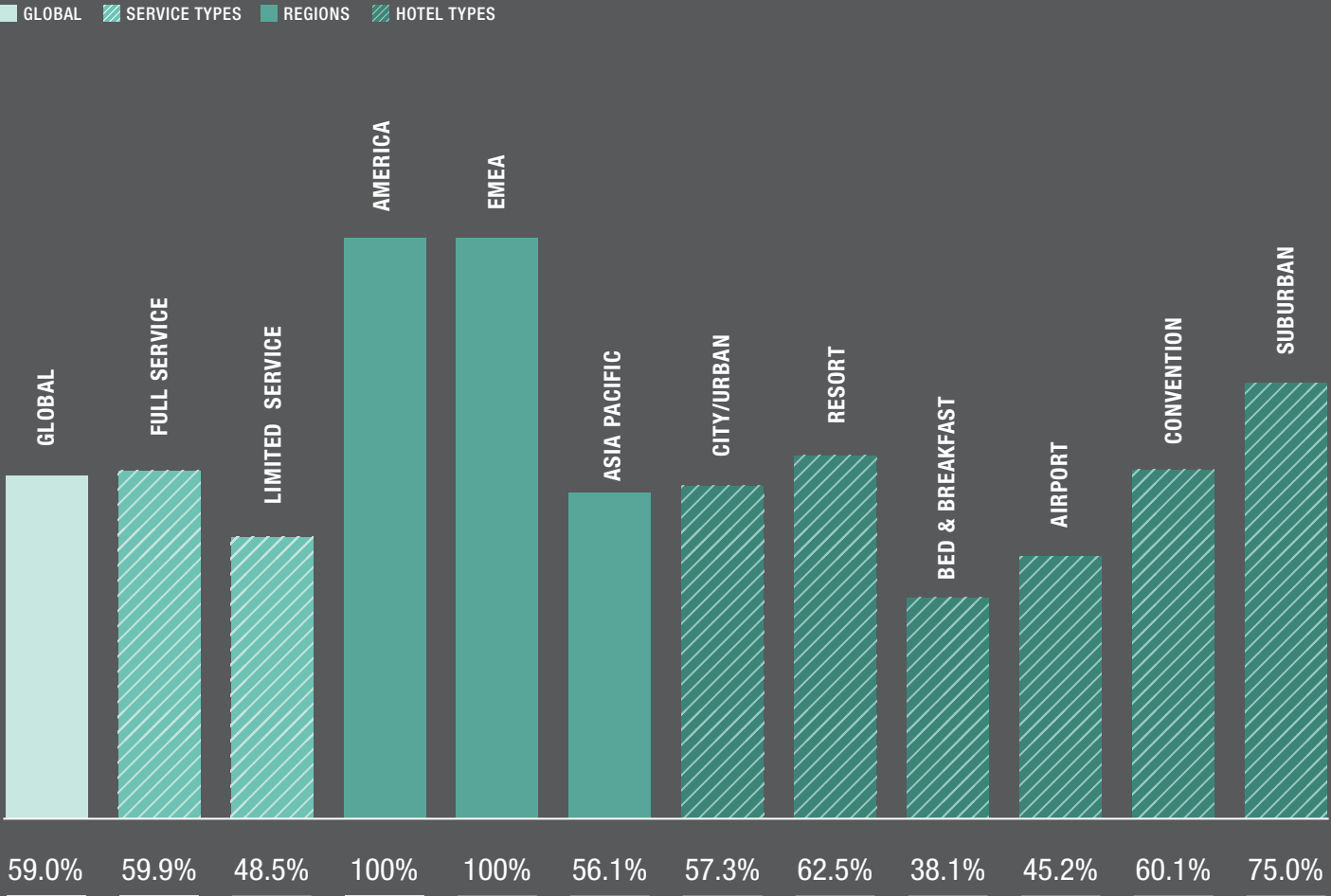




Organic Vegetable Garden, Six Senses Qing Cheng Mountain, China

We asked, “Does the property have sustainability-specific requirements in its procurement of goods and services?” Fifty-nine percent said yes. Fifty-five percent said they have such requirements of suppliers. Forty-eight percent said they have such requirements of contractors. Forty-eight percent said they have such requirements of service providers. Eighty-two percent said their property has a policy that requires procurement from local suppliers, when possible.

PROCUREMENT REQUIREMENTS





Committed to Purchasing Sustainable Seafood, **Fairmont Waterfront**, Vancouver, Canada

Last year, 16 percent said they had agreements with vendors for end-of-life take-back for recycling. This year, 25 percent said they have such an arrangement.

Earlier this year, Hilton released a progress update on the implementation of its global commitment to responsibly source its seafood by 2022. The report details how Hilton established a baseline of its seafood purchasing data, created relevant training for all Team Members and deepened partnerships with related non-governmental organizations and suppliers. Seafood procurement is just one of the many areas of procurement that have been impacted in recent years by drives toward sustainability.

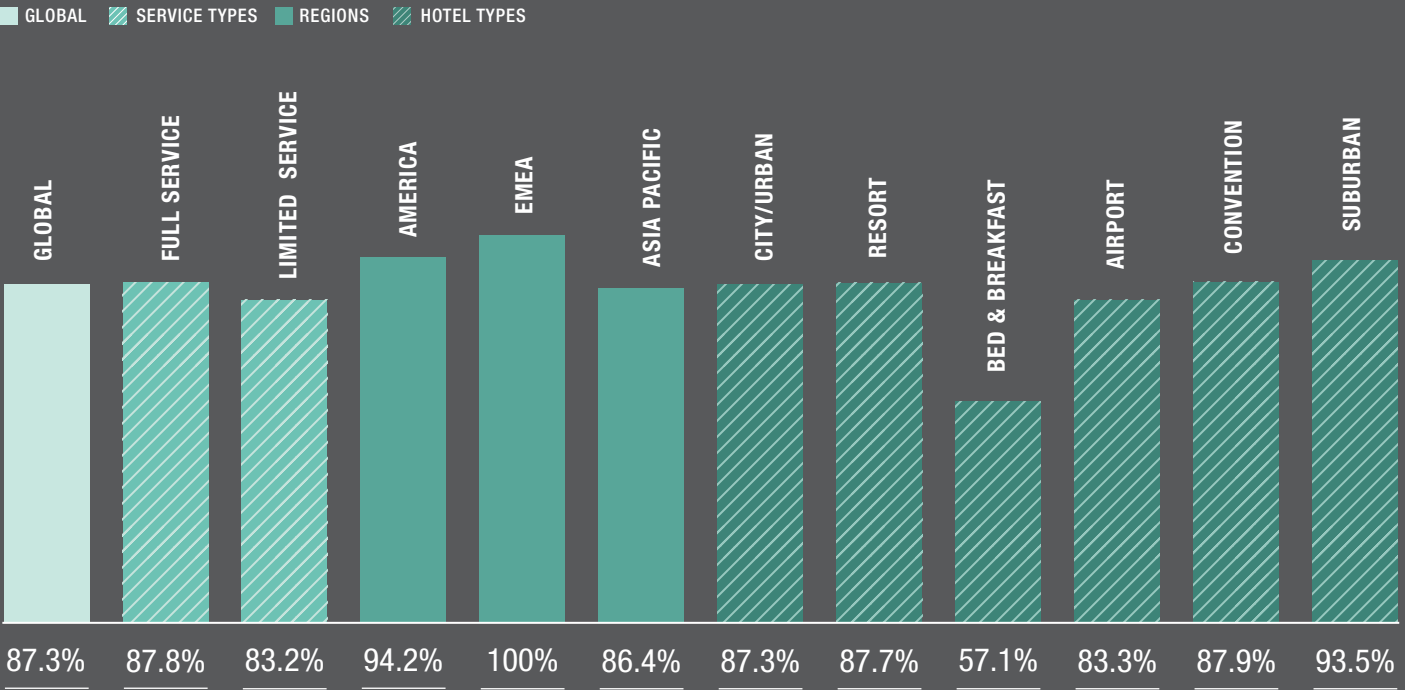
## SUSTAINABLE SEAFOOD PROCUREMENT



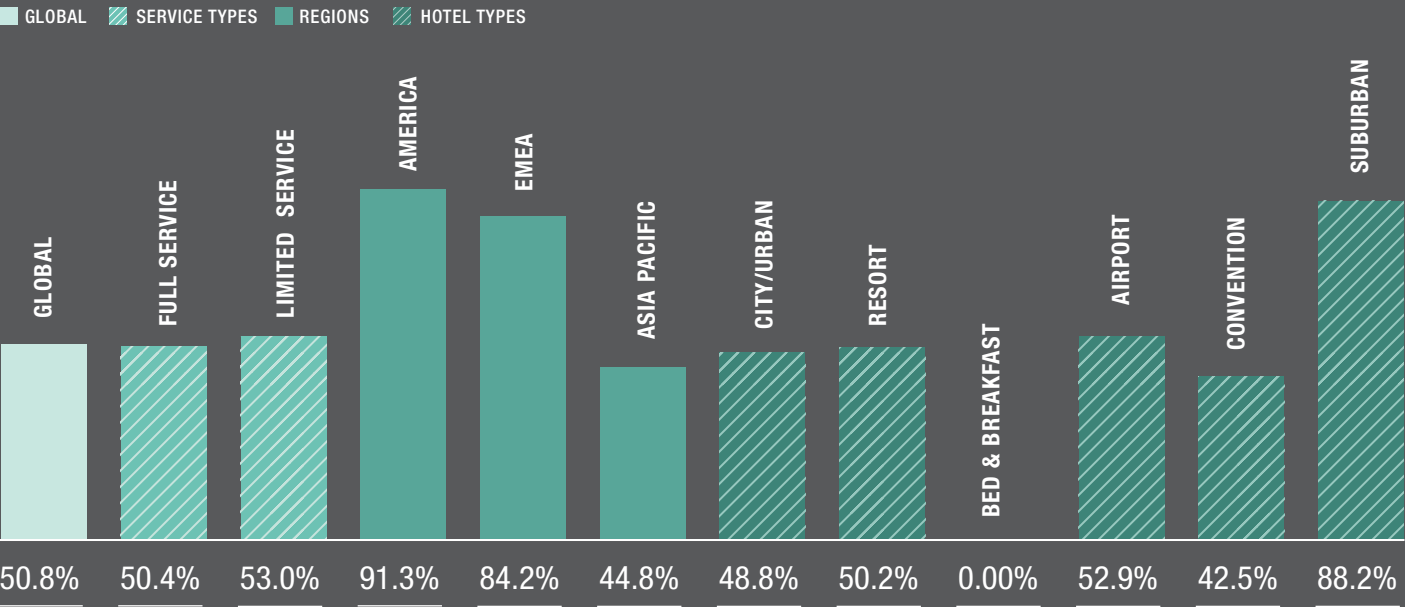
In our survey this year we asked, “Do you have a towel reuse plan in place, which includes housekeeper training, and periodic checks?” Eighty-seven percent said they do. In the Americas region, 94 percent said they have such a program. Interestingly, the 2016 Lodging Survey, an AHLA, STR, AHLEF production that had just over 8,000 responses, reported that 94 percent of respondents have a linen/towel reuse program. In other regions of the world the percentages are similar. There is no doubt a linen/towel reuse program has become a part of doing business and an expectation.

When asked, “Is a linen and towel reuse program in place that changes linens every three days by default except upon guest request or check-out?”, 51 percent said yes. Last year that number was 43 percent.

LINEN/TOWEL REUSE PROGRAM



LINEN/TOWEL CHANGE UPON REQUEST







"Newly revised towel/linen reuse program being tested allows guests to opt out entirely from housekeeping."  
Grand Hyatt Atlanta in Buckhead, USA.

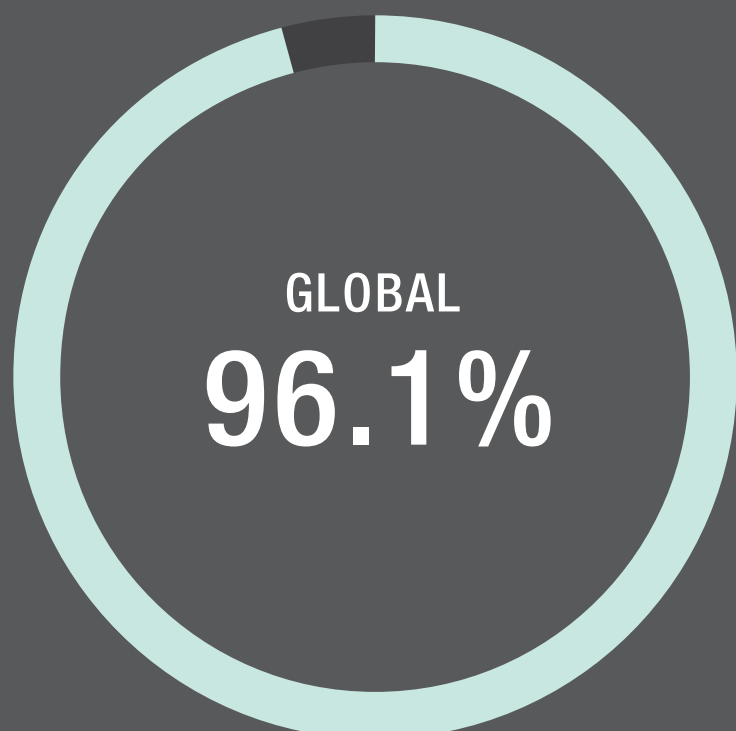
Ozone laundry systems offer the opportunity to save energy, water and chemicals but they are still rare in our industry. Only 7 percent of hoteliers told us they have an ozone system in place. That is down from 16 percent last year. Six percent said they plan to invest in an ozone system. We asked respondents this question: "If you considered an ozone laundry system but then later decided against it, what was the biggest obstacle(s) to its implementation?" Time and time again hoteliers said "cost."

Earlier this year in April, a teenage boy died and 13 others were injured from a carbon monoxide leak at an indoor pool at a Quality Inn & Suites hotel in Niles, Mich. Among the injured were other teens as well as three police officers, two hotel employees and another adult. According to media reports, dangerous levels of carbon monoxide built up at the pool heater and were detected in high quantities in other areas of the hotel. In July, at the Guest House at Graceland, a hotel adjacent to Elvis Presley's Memphis home, there was a Legionnaires disease outbreak with nine confirmed cases of the illness. Could these incidents have been prevented with proper preventive maintenance?

Fortunately for hotel guests around the world, 96 percent of the respondents to our survey said they have a preventive maintenance plan which checks, at least quarterly, that building energy and water equipment (e.g. HVAC, lighting, plumbing fixtures, irrigation systems, etc.) are functioning properly.

## PREVENTIVE MAINTENANCE PROGRAM

■ GLOBAL



# CLIMATE ACTION & CERTIFICATION



Melting Glaciers in Antarctica

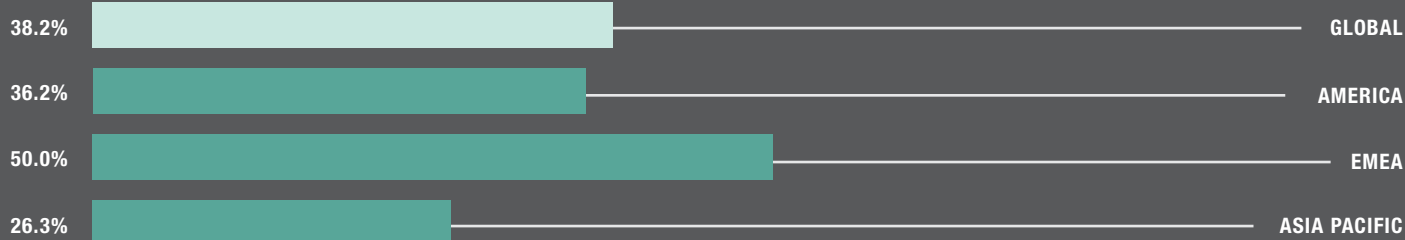
Climate change has been a hot topic again in 2017—with record CO2 levels, record heat, glaciers breaking, sea levels rising, U.S. President Donald Trump withdrawing from the Paris climate accords and Vice President Al Gore publishing his sequel to “Inconvenient Truth” entitled, “An Inconvenient Sequel: Truth to Power.”

For this year’s report we asked participants, “To what degree does climate change drive you to make operational improvements and investments?” Thirty-eight percent said it has significant impact. Forty-six percent said it has some impact.

## CLIMATE CHANGE DRIVER OF ACTIONS

### SIGNIFICANT IMPACT

GLOBAL REGIONS



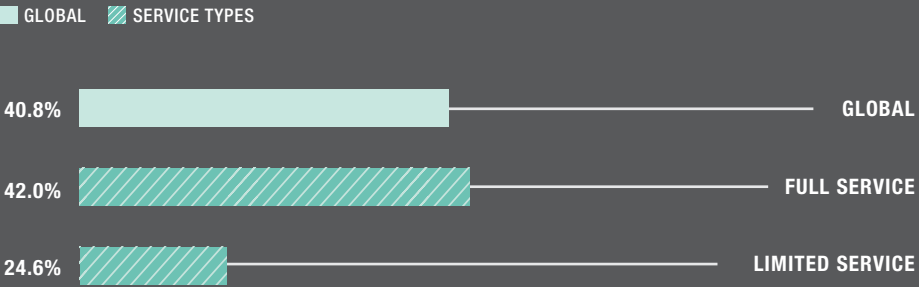
### SOME IMPACT

GLOBAL REGIONS

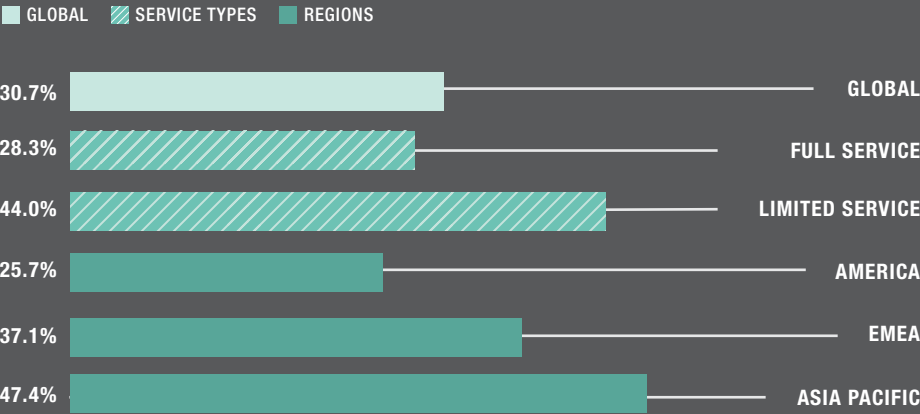


Forty-one percent measure their property's carbon footprint. Sixty-one percent of those folks said they measure for the total carbon footprint in a year. Thirty-five percent said they use the lodging industry standard HCMI (Hotel Carbon Measurement Initiative) as the metric for measuring their carbon footprint.

CARBON FOOTPRINT MEASURED



GUEST COMMENT LED TO SUSTAINABILITY RELATED CHANGE

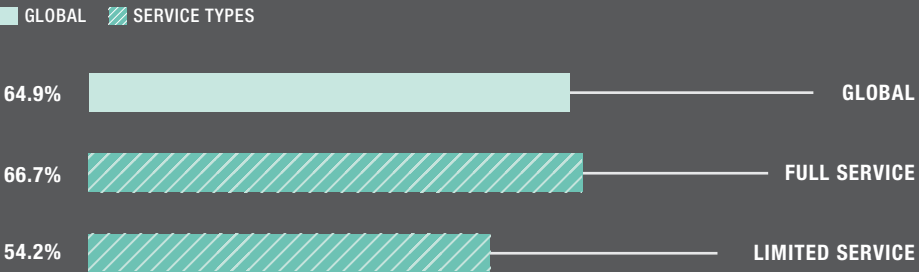


A small number of hoteliers purchase carbon offsets or renewable energy certificates—just 7 percent. Just 2 percent said they plan to do so.

We asked, “Approximately what percentage of your guests seeking out room nights or meeting space at your property ask about the opportunity to offset carbon emissions? Just 2 percent said 90 percent or more ask about offsetting carbon emissions. Thirty-seven percent said from 1 percent to 49 percent ask about carbon offsetting.

For the second year in a row we asked, “Does the hotel provide facilities/resources to encourage employees to favor sustainable transportation (e.g. bike storage and change rooms, subsidized public transit passes, shuttle buses, parking for low emissions vehicles, etc.) in an effort to reduce transportation-related GHG Emissions? Sixty-five percent said yes. Last year: 57 percent.

SUSTAINABLE TRANSPORTATION OPTIONS



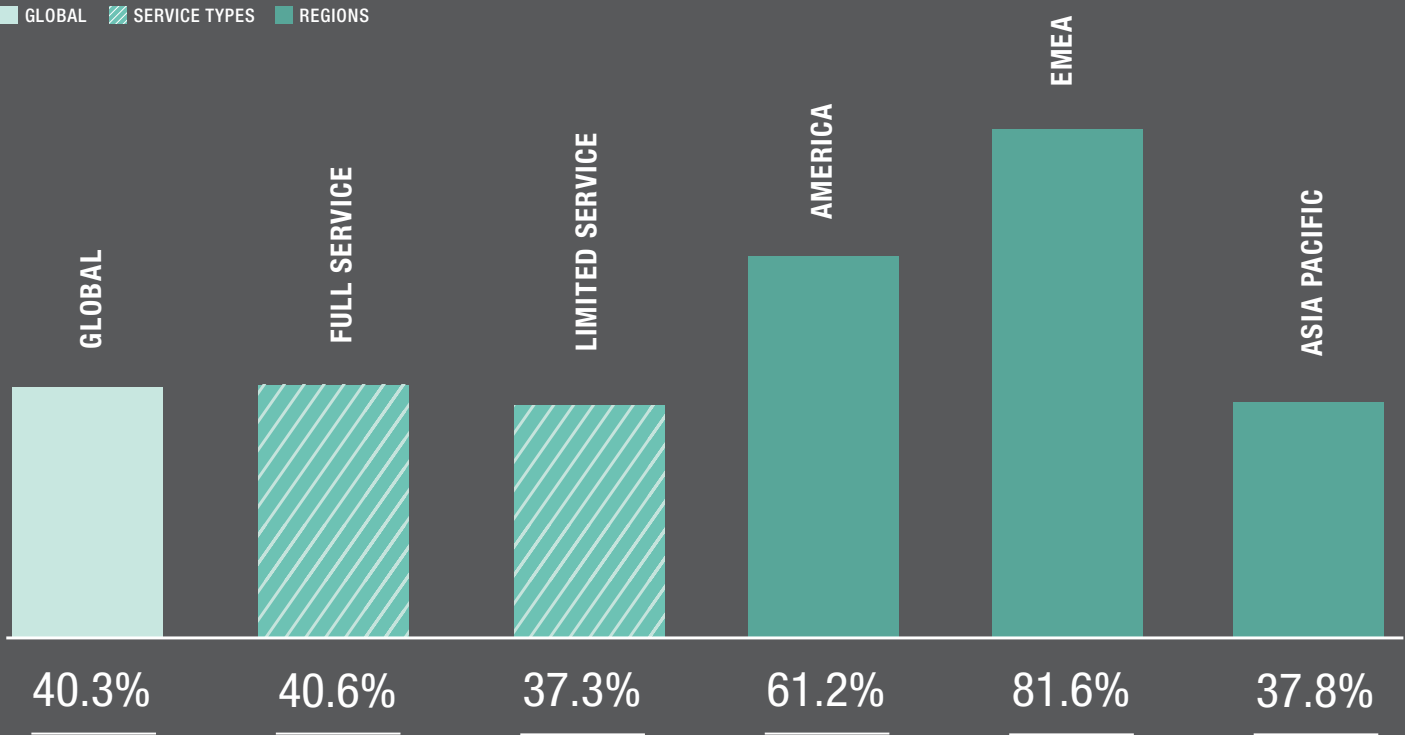




Free Bicycle Rentals, Hilton Nagoya, Nagoya, Japan

Certification is one sure-fire way of confirming your property is doing what it says it is doing in areas such as energy and water conservation and waste management. This year we asked, “Is your property third-party labeled or certified for its sustainability initiatives? Forty percent said yes. That is down significantly from 60 percent last year. Ten percent said they plan to obtain a third-party label or certification. Most of those saying they have participated in some type of labeling or certification program cited TripAdvisor GreenLeaders (34 percent) followed by Travelife (19 percent), Green Key Eco-Rating (16 percent), Green Seal, 3 percent, and Green Key FEE (Foundation for Environmental Education), 2 percent.

### THIRD-PARTY CERTIFICATION





“What value have you found in certification?”  
Here are some of the responses:

“Mainly in keeping us honest and pointing us towards sustainable best practice. Also, some business benefit as it proved differentiating factor for at least one group.”

“The certifications help us understand and apply good environmental practices and optimize operations to be sustainable.”

“Valuable feedback and excellent benchmarking initiatives.”

“Very valuable and looked at highly by guests staying at the hotel.”



Certified by Travelife, Green Key (FEE), TUI Environmental Champion,  
**Hotel Galosol**, Caniço, Madeira, Portugal



Awarded by Green Key Eco-Rating Program, **Hyatt Regency Indian Wells Resort & Spa**, California, USA

## ABOUT THE GREEN LODGING TRENDS REPORT

The Green Lodging Trends Report is the lodging industry's annual exercise to assess and benchmark sustainable best practices across hotels worldwide. Updated annually, the Green Lodging Trends Report helps discover innovative hotel efforts that should be recognized and can benefit peers, and shows what's trending each year.

The Green Lodging Trends Report is powered by the Greenview Portal and managed by Greenview and Green Lodging News. We have support from cutting edge sponsors and recognized industry supporters.

### Why should you participate

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- |  |   |
|--|---|
| 01 Get a free compare report! Find out where your property is aligned with best practices, and where it is behind among peers locally and worldwide. | 02 Discover new innovative practices that hotels are implementing.                  |
| 03 Use information to improve and ultimately outperform your competitors.  | 04 Highlight your innovations to showcase to the world in the annual trends report. |

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### How the Survey is Conducted

The Green Lodging Survey is comprised each year of approximately 100 questions covering operational practices, facility attributes, and outreach programs to conserve resources, reduce carbon emissions; increase guest experience, and make positive community impact. The 2017 survey consisted of 110 questions. Quantitative data (i.e. energy and water consumption) are not collected; the survey is focused only on practices and attributes. Hotels participate by responding to the survey via the [Greenview Portal](#), an online portal platform where work can be saved over time and recurring participants can update their answers easily each year. In addition to participant respondents, data are integrated from supporter data sets of similar or parallel questions. For the 2017 Green Lodging Survey, data were integrated from 1) the Asia Pacific Sustainability Data Trends Report 2015, published by Horwath HTL Asia Pacific and co-authored by Greenview, and 2) data on file from 2015-2016 within the Greenview Portal for surveying done for other hotel customers and hotel companies.

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### Data Confidentiality

With the exception of approved case study highlights and examples, no property-level data are shared with other entities outside the owner or operator of that property. The data kept on file within the Greenview Portal remain confidential, and the integration or streamlining functions for data feeds (i.e. from customer surveying) are always contingent upon property participation each time.

Aggregate results are distributed to industry supporters as identified among their membership. Therefore, a certification body will receive an aggregate snapshot of prevalence among the properties within their membership on a whole as compared to the overall data set and peer group (but no individual-level property data are shared with certifications or other industry supporters).

All participants and supporters are asked not to publicly share their results, as the Green Lodging Survey seeks to stimulate competitive benchmarking for internal purposes but not external scoring or rating.

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## Technical Notes

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The total number of hotels in the survey reached a maximum of 2,093 from 46 countries. As this resulted from participation + data integration, some questions will have less respondents in the sample.

As an introductory survey and communicated through a network interested in Green Lodging, we recognize the potential for systemic bias in the survey: those hotels striving to excel in sustainable hospitality may be more inclined to participate than those who are not. So the results may not be representative of the industry overall, and best practices or attributes may be less prevalent than reported in the results.

Property survey responses have not been verified or audited for accuracy. Where some inconsistencies were found (i.e. not having a kitchen but identifying VFDs in kitchen hood fans), those were removed for data quality. It could be possible that some participants did not properly understand the questions or had indicated responses incorrectly. However, as all information is kept confidential and no public benchmarking of

specific properties exists, the Green Lodging Survey seeks to encourage truthfulness so that participants receive maximum benefit of the compare reports they receive back as a yardstick of their performance and progress.

Not all of the 110 questions were included in this trends report. The compare report participants receive will contain prevalence among peers for all questions, broken down further by location and segment. To view all the results, hotels will need to either participate in the survey or subscribe to the Greenview Portal.

The uptake, prevalence and performance of the participants as indicated in this trends report is equivalent to the number of properties indicating “Yes” divided by the total number of applicable properties. For example, properties that do not have food and beverage operations are excluded from the denominator of properties for food and beverage questions.

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## 2018 Green Lodging Trends Report Outlook

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This Green Lodging Trends Report is the second annual exercise for industry trends and benchmarking. The 2018 survey will open in the second quarter of 2018, with the results published in the fourth quarter of 2018.

The survey will be enhanced next year to add new, innovative best practices to the questions. It will be further improved based on participant feedback, particularly in segmenting or adjusting the questions by property type, so that properties can be benchmarked according to property type.

One of the goals of the Green Lodging Survey is to invite and encourage all hotels to participate, regardless of their journey towards sustainability, to help move the industry forward. So, it is possible that next year's results, with expanded participation, may show less prevalence or uptake of best practices as new-comers join the survey. With more participation, we will be able to further segment and filter the results, and in year three, we will be able to produce “like-for-like” trends that show the trajectory of practices among the same group of participants over time.

### Sponsor the 2018 Green Lodging Trends Report!

Would you like your company and brand to be part of this industry-advancing project? To find out how you can sponsor the next report visit [www.greenlodgingnews.com](http://www.greenlodgingnews.com) or contact Glenn Hasek at (813) 510-3868, or by e-mail at [editor@greenlodgingnews.com](mailto:editor@greenlodgingnews.com).

# SPONSORS

## Cass Information Systems

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Cass is a waste expense management provider (not a broker, not a hauler) that will help you control waste hauling costs and improve recycling efforts. Using our proprietary WasteVision™ and ExpenseSmart® technology platforms, we reduce your costs and make it easy to visualize your waste streams and expenses. We provide useful, accurate data on diversion rates, your waste service costs and savings obtained through our program. Our full solution includes: knowledge-based procurement, invoice auditing, service optimization recommendations and centralized support for vendor requests (we work with your vendors—so you don't have to). Our web-accessible reporting includes service utilization metrics and costs by yardage, by hauler, by location, and region. Cass (Nasdaq: CASS) manages over \$40 billion in client spend each year. Watch our videos and learn more about the value that we deliver at [www.cassinfo.com/waste](http://www.cassinfo.com/waste).



## ClearWater Tech, LLC

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Established in 1986, ClearWater Tech has served the global market as the leading designer, manufacturer, and marketer of ozone generation equipment and related components to serve a wide range of water and air purification applications and markets.

The EcoTex name reflects the advanced laundry oxidation systems designed, engineered, manufactured, and distributed by ClearWater Tech, LLC. EcoTex systems enable commercial laundry professionals to replace expensive multi-step wash programs that use excessive chemicals and hot water with cold-water programs that use the power of ozone for disinfection and detergent activation. EcoTex reduces environmental impact, improves laundry quality, saves money, energy and detergent, while providing superior disinfection.

ClearWater Tech's paramount role as an innovator and leader in the ozone industry is reflected in its core philosophy; excellence in design and product development, highly skilled applications engineering, quality manufacturing, followed by technical and service support. This strong design and development direction serves to keep ClearWater Tech connected with the latest technologies. Call (800) 262-0203, (805) 549-9724, e-mail [sales@ecotexozone.com](mailto:sales@ecotexozone.com), or go to [www.ecotexozone.com](http://www.ecotexozone.com).





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**reCollect2**

reCollect2 Company is creator of the reCollect2® in-room recycling receptacle. Designed with simplicity in mind, the reCollect2 offers a clean, cohesive and streamlined silhouette complementing today's modern spaces. Each three-piece set includes: a recycle bin, matching bin for non-recyclables and set-base for customized identification and function. Manufactured from recyclable plastic and responsibly made in Wisconsin, USA; the reCollect2 offers a stylized solution for hotel guestroom/in-office recycling that will help promote, encourage and reinforce your own organization's sustainability message, practices and achievements. Contact: Ann Rippenburg, (262) 527-9375, [info@reCollect2recycler.com](mailto:info@reCollect2recycler.com). Also go to: [www.recollect2recycler.com/home](http://www.recollect2recycler.com/home).



# INDUSTRY SUPPORTERS

## Avendra

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Formed in 2001, Avendra is North America's leading procurement services provider serving the hospitality and lodging industries. Avendra customers gain access to contracts leveraging over \$4 billion of annual purchases, expert advisory services and in-depth purchasing data and analysis. Through Avendra, customers obtain substantial savings on their purchases and other value added services to improve their operations and bottom line results. More than 7,000 hospitality businesses rely on Avendra's procurement solutions to help meet their strategic business initiatives.



## Boston Green Tourism

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Boston Green Tourism (BGT) is a membership organization for Boston hotels. It also organizes green hospitality workshops across the United States, and advises hotels and companies that serve hotels. BGT helps hotels reduce energy, water and waste and toxins; choose greener transportation alternatives; identify greener food options; and attract more business based on their environmental performance. For Boston hotels, BGT organizes eight green hotel workshops a year, publishes a newsletter, provides a green hotel training program, helps hotels secure utility incentives and tax breaks and introduces hoteliers to qualified vendors. Contact Dan Ruben at (617) 527-7950 or [dan\\_ruben@usa.net](mailto:dan_ruben@usa.net).



## Brighton Management

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Brighton Management is a leading hotel management company operating over 50 hotel properties, totaling over 10,000 rooms, across the United States. Brighton is an award-winning, preferred management company for major hotel brands such as Marriott, IHG, Hilton, Starwood, and Wyndham. Brighton specializes in hotel operations, revenue management, and commercial development. Since 2014, Brighton has been recognized by Southern California Edison and IHG for being an industry leader in hotel energy efficiency.



## Caribbean Hotel & Tourism Association

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The Caribbean Hotel & Tourism Association (CHTA) is a federation of 32 National Hotel & Tourism Associations, with more than 600 member hotels and over 300 allied members. CHTA is the largest representative of the private sector in the Caribbean hotel and tourism industry. We are the voice of the Caribbean hospitality industry for the development of the region in the highly competitive and sophisticated environment of international tourism. Today, tourism is widely recognized as a pivotal industry in the economy of the region and CHTA functions as the common denominator for this industry in a region of diverse nationalities, languages and styles, identifying mutual problems and marshaling the resources of the active and allied members to devise solutions. For further information, visit [www.caribbeanhotelandtourism.com](http://www.caribbeanhotelandtourism.com).



## GreenOtels

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GreenOtels is a media platform with a vision to involve and engage the hospitality industry towards a greener consciousness by tracking trends via print and ezines, by holding meetings and conferences for ideation and dialogues with thought-leaders, enabling solutions through consultations, training tools, and prototype experiments as well as benchmarking and recognizing best practices through research and awards.

GreenOtels is a collaborative endeavor of professionals and promoters in hospitality as well as companies and individuals engaged in sustainable development to help make the big shift to a sustainable future and a zero waste based society. This will be made possible by developing a common understanding of ecological integrity and sustainability principles across varying brand cultures and size of operations in the hospitality industry in India.



## Green Key (FEE)

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Green Key is a voluntary ecolabel for hotels, hostels, campsites, holiday parks, small accommodations as well as conference centers, attractions and restaurants. The Green Key award is based on compliance with strict criteria in the areas of environmental management (water, energy, waste, cleaning, etc.) and sustainability education (staff, guests, suppliers, etc.). Compliance with the criteria are confirmed through a rigorous application process and verified at on-site audits. The award is valid for one year at a time.



Currently, more than 2,500 establishments in 54 countries are awarded with the Green Key. The program is managed by the international charity, the Foundation for Environmental Education. Green Key is endorsed by the World Tourism Organization and recognised by the Global Sustainable Tourism Council. E-mail [info@fee.global](mailto:info@fee.global) for more information.

## Green Key Global

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Green Key Global is a leading, international, [GSTC](#) Recognized, environmental certification body whose suite of industry standard programs and resources has been designed specifically for the lodging and meetings industries. Our affordable programs, including the Green Key Eco-Rating and the Green Key Meetings Programs, help members leverage organizational CSR activities to support their property's sustainable initiatives, improve overall fiscal performance and community relations. With member properties in over 20 countries and a notable mix of branded and independent members Green Key Global truly is the lodging industry's certification program of choice.



For further information contact [info@greenkeyglobal.com](mailto:info@greenkeyglobal.com), (613) 237-7149, or go to [www.greenkeyglobal.com](http://www.greenkeyglobal.com).



## Green Seal

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Green Seal, an independent 501(c)(3) nonprofit organization founded in 1989, provides science-based standards and certifications that are credible, transparent, and essential in allowing manufacturers, purchasers, and consumers to make responsible choices that protect human health and the environment while positively impacting business.



Our leadership standard for Hotels and Lodging Properties, GS-33, focuses on waste minimization, energy conservation, fresh water resource management, wastewater management, pollution prevention, and environmentally sensitive purchasing. Certification is achievable for a wide range of properties—from national chains to boutique hotels—and the three-tiered system encourages gradual but steady improvement.

Learn more at [www.greenseal.org](http://www.greenseal.org) and [www.greenseal.org/GS33](http://www.greenseal.org/GS33), or contact us at (202) 872-6400 to find out how we can help with your sustainability goals.

## Horwath HTL—Asia Pacific

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[Horwath HTL](#)—Asia Pacific is the regional arm of Crowe Horwath International's Hotel, Tourism and Leisure Consulting Group. Since its establishment in 1987, Horwath HTL has been involved with thousands of projects throughout the region in all phases of the property lifecycle for clients ranging from individually held businesses to the world's most prominent hotel companies, developers, lenders, investors and industrial corporations. Offices are currently located in Singapore, Hong Kong, Tokyo, Beijing, Shanghai, Jakarta, Kuala Lumpur, Bangkok, Sydney, Auckland and Mumbai.



By combining resources from our offices in key cities throughout the Asia Pacific region and globally, when needed, we ensure clients receive a multi-skilled international perspective for their projects and benefit from our wide-reaching industry contacts. We are also supported by the Horwath HTL database.

Our services are grouped under three main areas: Planning & Development Services, Asset Management Services, and Transaction/Lender Services.

## Travelife

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Travelife is an internationally recognized sustainability certification scheme, and has been developed by the travel industry for the travel industry. Travelife is the only certification scheme to work in partnership with tour operators like TUI, Thomas Cook, DER Touristik, Virgin Holidays and Flight Centre UK and many others—including over 50 of their travel brands, all of whom promote the adoption of Travelife by their contracted accommodations. Travelife is a fair and affordable system that assists hotels and accommodations in showing that they are serious about sustainability.



Travelife currently has 1,400 member hotels in 55 countries with 768 gaining the Travelife Gold certification. Since Travelife's inception in 2007 the certification has grown to be recognized and used by all major European tour operators.

Call +44 (0) 20 3693 0160, e-mail [info@travelife.org](mailto:info@travelife.org), or go to [www.travelife.org](http://www.travelife.org).

# GREEN LODGING TRENDS REPORT 2017

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**Published by**  
Green Lodging News and Greenview

**Printed by**  
Greenview, Singapore

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**Green Lodging News**  
15301 Hidden Arbor Ct.  
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