Sustainable Energy for All: Opportunities for the Travel and Leisure Industry
Acknowledgements

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Contents

Preface 3
Summary 4
The Importance of Sustainable Energy for the Travel and Leisure Industry 6
Priority Actions for the Travel and Leisure Industry 9
Preface

In support of the United Nations Secretary General’s Sustainable Energy for All initiative, the United Nations Global Compact and Accenture have partnered to identify the most important actions the private sector can take across nineteen different industries to advance the primary objectives of the initiative while simultaneously driving business value.

This body of work includes an introductory report that discusses the relationship between the initiative and the private sector in a broad sense, as well as 19 individual “Industry Opportunity” documents. In total, the objective is to provide guidance and to inspire companies across all industries to take action in pursuit of sustainable energy and benefits for their own companies.

This document provides an analysis of the opportunities Sustainable Energy for All presents to the travel and leisure industry. It identifies specific priority actions travel and leisure companies can take to advance the three objectives of the initiative—energy access, energy efficiency, and renewable energy—while also driving increased business value.

As UN Secretary General Ban Ki-Moon wrote prior to the 2012 World Future Energy Summit, “Energy transforms lives, businesses and economies.... To succeed, we need everyone at the table—governments, the private sector, and civil society—all working together to accomplish what none can do alone.... The obstacles are not so much technical as human. We need to raise sustainable energy to the top of the global agenda and focus our attention, ingenuity, resources, and investments to make it a reality.”

Addressing the world’s energy needs is a way to advance society and also to advance sustainable value creation for the travel and leisure industry—while balancing positive economic, environmental, and social gains across the globe.

About the Travel and Leisure Industry

The travel and leisure industry represents a diverse group of companies that span hospitality, commercial airlines, car rental companies, passenger bus, ferry and rail, travel operators and agencies. Hospitality companies can range from small motels to global hotel and resort chains. Travel by commercial airline, car rental, bus, ferry or rail includes both business and leisure travel. The analysis in this document does not include freight transportation, cruise ships, gaming or transportation by private car.
The ambitious goals of the United Nations Sustainable Energy for All initiative will require commitment and vigorous action from the private sector to drive investment, increase innovation in products and services, and increase operational efficiencies. The travel and leisure industry has opportunities to both contribute to the broader developmental goals of the initiative and to realize its own significant potential for growth and innovation.

Air travel and the energy consumption of buildings operated by hospitality companies are the two most energy-intensive aspects of the travel and leisure industry. Over half of the world’s 5.9 million hotel rooms are located in Europe. Approximately 90 percent of these European hotels are small, independent businesses that, studies show, are less proactive about reducing their negative environmental impacts than large hotel chains, which have generally made more of the historic energy efficiency improvements in the hotel sector. Thus, looking broadly across the global hospitality industry, significant opportunities exist to improve energy efficiency at scale.

From the perspective of the airline industry, the International Council for Clean Transportation reports that energy efficiency of commercial aircrafts has doubled since 1960 due to the introduction of new aircraft designs. However, progress has stagnated in the last 20 years. This could result in greater issues in the coming years because passenger air travel is expected to sustain 6 percent growth or higher in the next five years. At this pace, increased demand will outstrip business-as-usual efficiency gains, causing energy consumption in the commercial airline component of the travel and leisure industry to continue to increase.

Commercial airlines also have a significant incentive to adopt more energy-efficient operations, as fuel accounts for an increasingly large share of total costs.

For travel and leisure companies to advance their business opportunities related to energy efficiency and renewable energy, the industry should focus on five priority actions—mapped to the business value levers, objectives, engagement modalities of Sustainable Energy for All:

<table>
<thead>
<tr>
<th>Priority Industry Actions</th>
<th>Business Value Levers</th>
<th>Objectives</th>
<th>Engagement Modalities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase energy efficiency of hospitality operations.</td>
<td>• Cost Reduction</td>
<td>• Energy Efficiency</td>
<td>• Core Business: Operations</td>
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<td>• Risk Management</td>
<td>• Renewable Energy</td>
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<td></td>
<td>• Revenue Growth</td>
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<td>Build and renovate hotels so they are energy efficient and produce their own electricity.</td>
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<td>• Brand Enhancement</td>
<td>• Renewable Energy</td>
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<td>• Revenue Growth</td>
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What Is Sustainable Energy for All?

Under the leadership of Secretary-General Ban Ki-moon, the United Nations is mobilizing key constituencies from the private sector, public sector, and civil society in a major global initiative, Sustainable Energy for All. The goal of the initiative is to catalyze action around three clear objectives to be achieved by 2030:

• Energy access: Ensuring universal access to modern energy services.

• Energy efficiency: Doubling the global rate of improvement in energy efficiency.

• Renewable Energy: Doubling the share of renewable energy in the global energy mix.

The Sustainable Energy for All initiative strives to mobilize bold actions and large-scale investments by fostering the enabling conditions for success, supporting cooperation and coordination across sectors, and tapping into a broad array of businesses and financiers. The initiative has the capacity to leverage a rapidly expanding knowledge network, disseminate ideas, and monitor progress toward the initiative’s objectives. It can “change the terms of engagement” by introducing new public-private partnerships based on synergies across relevant sectors of the economy and engendering constructive dialogue on policy, investment, and market development by governments, businesses, and civil society.

Sustainable Energy for All provides a clearly articulated global vision for sustainable energy and brings together the unparalleled global convening power and reach of the United Nations, which will help build consensus, drive a common agenda, and coordinate the actions of multiple entities at both the global level and the national levels, helping all entities work toward shared and mutually beneficial goals. Sustainable Energy for All brings together all relevant stakeholders in the sustainable energy area—the public sector, private sector, and civil society—on a common and open platform for communication and collaboration.

For more comprehensive information about Sustainable Energy for All, please go to: http://www.sustainableenergyforall.org/
The Importance of Sustainable Energy to the Travel and Leisure Industry

Energy Consumption Driven by Lodging and Air Travel

The most energy-intensive components of the travel and leisure industry are lodging and air travel. Hotels and resorts worldwide have the largest energy footprint, followed by air travel. Looking at the energy use profile for lodging, most of the energy consumed by hotels and motels is electricity used for space cooling and lighting. Natural gas is typically used for space heating requirements, but this varies based on market and region.

In the United States, it is estimated that the operations of buildings for lodging account for approximately 0.3 percent of world energy consumption. While this may seem small, making scalable energy efficiency improvements across entire chains can make a significant impact in reducing energy consumption. With regard to travel, sustainable energy efforts are critical. Given the current growth in travel demand, business-as-usual efficiency gains will not be able to keep pace and energy consumption will increase.

Areas of Potential High Growth

Booking travel online is the fastest growing segment within the industry and is expected to reach one-third of the total global travel market by the end of 2012. Following this trend, tour operators are shifting to an e-commerce model. The travel and leisure industry was hit hard as a result of the global economic recession in 2008; however, the World Travel and Tourism Council reported positive growth of the global travel and tourism industry in 2011 and estimates the ten-year growth of the industry at 4 percent per year between 2011 and 2021. The World Travel and Tourism Council attributes the growth to emerging markets, naming China as the main driver of travel and tourism demand between now and 2020. Hotel companies are rapidly expanding into China and other emerging markets as a means of capturing growth in demand for lodging. For these reasons, hospitality companies and commercial airlines are aggressively pursuing strategies for alternative and renewable energy, in addition to energy efficiency, as a way to increase revenue, reduce costs, enhance their brand, and manage risks.
The Business Opportunity
Presented by Sustainable Energy for All

In taking actions to advance the three objectives of Sustainable Energy for All, the extent of this unprecedented, rapid change will provide companies with new opportunities to drive sustainable business value in a manner that aligns to their core strategies. To seize these opportunities, there are four engagement modalities companies can address as they implement the identified priority actions:

1. Core Business – Operations: Businesses can transform their operations through increased energy efficiency and the use of renewable energy alternatives.

2. Core Business – Products and Services: Businesses can innovate and modify their core products and services to meet the new and developing market demands for more energy efficient products, sustainable energy, and the infrastructure needed to extend energy access around the world.

3. Social Investment and Philanthropy: Businesses can identify ways to establish a strategic link between social investments and their core strategies to increase the likelihood that such activities will be sustained and able to reach scale.

4. Advocacy and Public Policy Engagement: Businesses can seek to engage governments (national, regional, or local) on relevant issues that protect competitiveness and drive opportunities, while working toward the objectives of Sustainable Energy for All.

Sustainable Energy for All provides a platform to address global financial, social, and environmental concerns associated with energy. Ultimately, in working toward the achievement of the three objectives of the initiative—energy access, energy efficiency, and increased use of renewables—businesses also have significant opportunities to drive sustainable value. Especially important are four value levers related to revenue growth, cost reduction, brand enhancement, and risk management.

Which Actions Will Your Company Take to Drive Value?

The particular actions a company chooses to drive business value depend on a range of factors: its unique attributes and energy characteristics; its business model, corporate strategy and consumer base; and external factors such as level of regulation and economic context. Each of the priority actions in this document is aligned to one or more of the four business value levers described here.

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<thead>
<tr>
<th>Business Value Levers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue Growth</strong></td>
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<tr>
<td>• Creating new business models</td>
</tr>
<tr>
<td>• Collaborating to develop new markets</td>
</tr>
<tr>
<td>• Developing new products and services</td>
</tr>
<tr>
<td>• Moving from products to services</td>
</tr>
<tr>
<td><strong>Brand Enhancement</strong></td>
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<tr>
<td>• Showcasing innovation</td>
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<tr>
<td>• Collaborating to increase transparency</td>
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<tr>
<td>• Improving community involvement</td>
</tr>
<tr>
<td>• Engaging stakeholders</td>
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<tr>
<td><strong>Cost Reduction</strong></td>
</tr>
<tr>
<td>• Improving energy efficiency</td>
</tr>
<tr>
<td>• Streamlining supply chain and logistics</td>
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<tr>
<td>• Reducing raw material consumption</td>
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<tr>
<td>• Changing operations to reuse waste</td>
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<td><strong>Risk Management</strong></td>
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<tr>
<td>• Contributing to policy agendas</td>
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<td>• Protecting “License to Operate”</td>
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<td>• Integrating risk management activities</td>
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<td>• Diversifying business model and operations</td>
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Sustainable Energy as a Value Driver for the Travel and Leisure Industry

The travel and leisure industry is well positioned to contribute to increases in energy efficiency and the further development of renewable energy in response to rising fuel and energy costs, pressure from environmentally conscious consumers, and changes to the regulatory environment. Some the actions the industry can take include: implementing energy management systems, installing energy efficient lighting, and implementation of sustainable supply chain and procurement practices. Specific to the commercial airline industry, companies can work to optimize operations and upgrade fleet to increase energy efficiency and the use of renewables. These initiatives can yield cost savings and positively impact shareholder value as a result of an enhanced brand and more effective management of regulatory risks and operational costs.

In the lodging sector, heating, cooling and lighting can represent as much as 60 percent of total energy use. Studies have found that energy costs are usually between 4 percent and 6 percent of revenue (as much as 10 percent for historic and luxury properties), so increasing energy efficiency provides direct bottom-line benefits. The benefits of improving energy performance go beyond costs, however. Cash flow that is freed up from lower energy bills can be used to upgrade facilities and provide better service for customers. A company’s investment in energy efficiency can also enhance brand image. A stronger brand image can help both attract customers and potentially command a premium on room rates.

Airlines have taken steps to reduce jet fuel usage by upgrading their fleets to more fuel-efficient planes and by making efforts to control fuel use. They have also made modifications to existing planes to increase their fuel efficiency. However, the industry is expected to face increasing cost pressures related to fuel over the next few years. In 2010, fuel costs were about 26 percent of total revenues, and this figure is expected to rise in the immediate future. Lastly, airlines have the potential to increase their renewable energy portfolio by exploring the use of biofuel. Tests have shown that biofuel can perform as well or better than traditional jet fuel. However, because it is still much more expensive to produce, widespread use of biofuel is not likely to be cost competitive for several years. Full-scale deployment will depend on having the right market, regulatory, and policy measures in place. The potential upside is two-fold: a reduction in the consumption of oil (resulting in less risk associated with price volatility) and an improved brand image with regard to sustainability and sustainable energy.
The following section provides detail on five priority actions the travel and leisure industry can take to become more energy efficient and advance their business opportunities in the sustainable energy market:

1. Increase energy efficiency of hospitality operations.
2. Optimize flight operations to maximize fuel efficiency.
3. Increase the use of renewable energy to power operations.
4. Purchase energy-efficient consumer goods and appliances.
5. Build and renovate hotels so they are energy-efficient and produce their own electricity.

1. Increase Energy Efficiency of Hospitality Operations.

Hotels are implementing energy management systems to track and manage energy consumption. Using an energy management system that is connected to a building, managers can gain near real-time visibility into energy used by lighting, heating, cooling, and other equipment. This data can be used to manage peak loads, make adjustments, and correct faulty equipment to maximize the efficiency of the building’s energy consumption. By monitoring the building systems closely—a process known as “continuous commissioning”—preventive measures can be taken to reduce the risk of equipment malfunction and energy efficiency loss. Companies can also replace oversized and inefficient heating, ventilation, and air conditioning equipment. For example, a new chiller can be 25 percent to 50 percent more efficient than equipment that is 10 or more years old.1

Lighting is an integral part of a hotel’s décor, but can also account for up to a third of energy consumption.12 Companies can retrofit facilities with more energy-efficient lamps such as compact fluorescent lamps, light-emitting diode (LED) bulbs, and modern fluorescent lamps. Lighting retrofits can reduce electricity use related to lighting by 50 percent or more, depending on the starting point, and can cut cooling energy requirements by 10 percent to 20 percent as well.13 Using energy-efficient light fixtures in conjunction with occupancy sensors can double the savings. Occupancy sensors can provide different lighting levels in public restrooms, conference rooms, and hallways without compromising guest comfort. A key-card management system is an effective way to curb energy consumption in guest rooms because guests must place their room key in the card reader for the lighting, heating, ventilation, air conditioning, and electricity to function.

Hotels face high demand for hot water. To reduce energy consumption related to water, companies can use direct-vent, sealed combustion condensing water heaters and boilers in lieu of traditional hot water heaters. Condensing boilers operate very efficiently during periods of low water demand and can also provide space heating. In the case of indoor swimming pools, which require simultaneous heating and dehumidification, hotels can use heat-pump water heaters. Heat-pump water heaters serve both of these needs efficiently: They heat water and also produce cool air, which can lower the pool room temperature and humidity.

Many hotels are also taking a more proactive approach to energy efficiency by implementing behavioral changes for guests and staff. Many hotels are offering guests the option of not having their sheets and towels laundered every night, and they encourage housekeepers to turn off all lights and set temperatures to more energy-saving levels after cleaning each room.

Case Study: Taj Hotels offer guest energy efficient options

Taj Hotels has invented an innovative way to have guests contribute to their energy efficiency goals by offering guests the option of staying in a “green room.” The room has been designed with energy efficiency in mind, without sacrificing comfort. The refrigerated mini bar has been replaced with a snack bar and the lighting is comprised of energy-efficient compact fluorescent lamps. Furthermore, the air conditioning is pre-set a few degrees warmer and the bed and bath linens are washed every other day instead of every day. A key card is required to operate the electricity in the room and the welcome channel on the TV provides educational information on environmental awareness and initiatives at the hotel. To further incentivize guests, Taj offers an additional 15 percent more reward points to guests that choose to stay in a “green room.”

In 2010, fuel costs were approximately 26 percent of total airline revenues, and these costs will likely continue to rise. Given higher costs and regulatory restrictions in the industry, commercial airline companies can take the following actions to achieve more fuel savings and reduce carbon emissions.

Pre-departure
Airlines can use more accurate estimations for the amount of fuel needed to minimize weight of extra fuel that will not be used; minimize weight of items loaded onboard; maximize use of ground electricity instead of aircraft auxiliary power units; and regularly wash the engine to reduce drag of dust and dirt.

Take-off/cruising
Airlines can shorten taxiing distance; optimize aircraft ascension route; fly at optimum cruising altitude; optimize routes for efficiency and adjust according to latest wind forecast by using a Dynamic Airborne Reroute Procedure.

Approach/landing/arrival
Airlines can adjust timing of flaps and gears to reduce air resistance; reduce use of thrust reverser; shorten taxiing distance; and use fewer engines during taxiing.

Many airlines have adopted these measures to cut costs and reduce environmental impacts. For example, American Airlines has saved a total of 500 million gallons of fuel in the past five years since implementing their Fuel Smart program.

Advances in jet engine technology are also driving increases in the energy efficiency of air transportation. The biggest barrier to overcome is the financing for research and development to develop a more fuel-efficient engine. Commercial airlines can take steps to create a market for more fuel-efficient aircraft and work with aircraft manufacturers to develop more fuel efficient planes. In addition, publicly declaring a commitment to invest in new, more fuel-efficient aircraft and to use jet engine bio-fuels when they become readily available are two measures that can help drive progress.
3. Increase the use of Renewable Energy to Power Operations.

Hotels and resorts can achieve significant energy and cost savings through the use of renewable energy in the following ways:

Solar

Solar energy can be harnessed to generate electricity—either through photovoltaic panels or concentrating solar power systems—or to heat water via solar thermal systems. These methods can be easily mounted on many surfaces and production levels can be projected with reasonable certainty. However, there are efficacy limitations due to weather, price, and installation space.

Combined Heat and Power

Combined Heat and Power is also known as cogeneration because it generates electricity and useful thermal energy in a single, integrated system. Compared to conventional methods, which produce usable heat and power separately, with a typical efficiency of 45 percent, combined heat and power systems can achieve efficiencies as high as 80 percent. Combined heat and power is ideal for hotel applications because it is capable of meeting all or a substantial portion of a facility’s electric power and thermal requirements on a continuous, 24/7 basis and can operate effectively during grid blackouts. Disadvantages include the substantial upfront capital investment required and the fact that the operation is complex and typically requires on-site staff. There are many examples of successful combined heat and power installations in hotels around the world. For instance, the Kauai Marriott Resort and Beach Club reported $706,000 in annual saving from a combined heat and power system.

Renewable Energy Credits

Hotels can also consider purchasing renewable energy credits to offset their energy consumption. A renewable energy credit is an environmental commodity that certifies indicating a specific quantity of energy produced from renewable sources. Because the credits act as a revenue source for renewable energy facilities, they incentivize development by making them more financially viable. Renewable energy credits are a favorable option to use in addition to energy saving initiatives for both new and existing hotels. The San Francisco InterContinental Hotel has agreed to purchase renewable energy credits from wind farms to completely offset 100% of the electricity it uses in order to achieve a Leadership in Energy and Environmental Design (LEED)—a rating system developed in 2000 by the United States Green Building Council—certification of its existing facility.

In the commercial airline industry, fleet upgrades are one way to increase the use of renewable energy. Technology and innovation are pushing airlines towards the use of biofuels. The industry has already achieved 50 percent blends of drop-in Hydrotreated Renewable Jet fuels. As noted earlier, biofuel can perform as well (sometimes better) than traditional jet fuel. However, financial, regulatory, and technical barriers exist to scaling the use of biofuel. Further analysis, cross-industry collaboration, government policy, and financial incentives are critical to advancing progress in the area of biofuels.

The hospitality industry purchases many items for day-to-day operations such as food, paper products, and personal care products. There are additional energy costs associated with the transport of these items for hotels on islands or remote areas where most food and consumer goods must be imported because there is no local supply or production. Hotels can take steps to improve energy efficiency of the supply chain by using a supplier scorecard and by embedding sustainable energy standards into the selection criteria. A supplier scorecard is an assessment of supplier performance that compares targeted and actual scores for the supplier; these scores are entered for the metrics defined in the scorecard definition. In addition, sourcing products that are local, made of recycled content, or that can be easily recycled reduces the energy needed to manufacture, transport, and ultimately dispose of goods after consumption.

Hotels are also heavy users of appliances and electronics such as refrigerators, televisions, microwaves, dishwashers, washers, and dryers. Kitchens and laundry facilities can be the most energy-intensive areas of hotels, by square footage. Upgrading appliances and electronics with newer and more energy-efficient models results in energy use reductions and cost savings. For example, the Saunders Hotel Group purchased more energy-efficient products, including refrigerators, clock radios, and televisions for guest rooms, and computers and fax machines for its offices, reducing total energy consumption reduction by 11 percent.

5. Build and Renovate Hotels so they are Energy Efficient and Produce their Own Electricity.

As noted earlier, more than half of the world's 5.9 million hotel rooms are located in Europe. About 90 percent of these hotels are small, independent businesses that, studies show, are less proactive about improving energy efficiency than large hotel chains. In addition, hotel companies are rapidly expanding in China and other emerging markets, responding to growing demand for travel lodging. These trends present opportunities to significantly increase energy efficiency within the hospitality industry.

Companies should consider focusing on building new properties in accordance with energy-efficient standards. Although the perception often exists that building according to green standards is more expensive, studies show that location and climate are more important than the level of energy efficiency as an influence on ultimate cost. Looking at the impact of certification from Leadership in Energy and Environmental Design — a study of the cost variation between certified and non-certified buildings found that the cost was not significantly different (factoring in the impact of location and climate) for heating and cooling costs. Furthermore, another study found that green buildings were expected to achieve a 7.5 percent increase in value, a 6.6 percent higher return on investment, and a 3 percent increase in rental revenues compared to standard buildings.

Consumers often choose hotels and make their travel decisions based on hotel appearance and amenities. For this reason, hotels are frequently remodeled to increase their appeal to guests. Hotels should consider renovating a property to energy efficiency standards such as Leadership in Energy and Environmental Design (LEED) or the equivalent. These standards pertain to things such as building enclosure, indoor air quality, water efficiency, day lighting, thermal comfort, and maintenance and operations. Green renovation can result in reductions in energy use and cost savings, and can also increase a hotel's brand value with energy-conscious consumers.

Large hotel chains have the opportunity to make the biggest impact and lead the way in environmental stewardship. For example, hotelier Marriott has received recognition for increasing the number of Leadership in Energy and Environmental Design certified properties and setting an ambitious target to have 300 certified hotels by 2015.
Conclusion

The priority actions identified in this document are meant to provide guidance and inspire travel and leisure companies to take action to advance the three objectives of the Sustainable Energy for All initiative while simultaneously maximizing their realized business value. It is vital that the private sector be fully engaged and committed to successfully achieve the initiative’s ambitious objectives. With the right level of support, coordination, and action the power of industry can be unleashed to ensure universal energy access, dramatically improve the energy efficiency of business operations, increase the use of renewable energy, and develop more sustainable products and services. Actions focused on achieving the desired outcomes of Sustainable Energy for All will drive significant positive societal change in addition to economic growth and opportunity.

Air travel and the energy consumption of buildings operated by hospitality companies are the two most energy-intensive aspects of the travel and leisure industry. Commercial airlines and hotel chains are especially well-positioned to have an impact on sustainable energy. Their scale and global reach enable them to have an influence on large portions of the business community and society. Commercial airlines also have a significant incentive to adopt more energy-efficient operations, as fuel accounts for an increasingly large share of total costs. For travel and leisure companies to advance their business opportunities related to energy efficiency and renewable energy, the industry can focus on the five priority actions detailed in this document. By focusing on these actions, the travel and leisure industry will be able to maximize its contribution to Sustainable Energy for All, increase business value, and ensure a sustainable future based on a balanced approach to improving social, environmental, and economic benefits for all.
Endnotes


17. http://www.aa.com/i18n/amrcorp/newsroom/fuel-smart.jsp

18. http://www.aceee.org/topics/chp


About the United Nations Global Compact
The United Nations Global Compact is a call to companies everywhere to: (1) voluntarily align their operations and strategies with ten universally accepted principles in the areas of human rights, labor, environment and anticorruption and (2) take actions in support of UN goals, including the Millennium Development Goals. By doing so, business can help ensure that markets advance in ways that benefit economies and societies everywhere. Endorsed by chief executives, the UN Global Compact is a leadership platform for the development, implementation, and disclosure of responsible corporate policies and practices. Launched in 2000, it is the largest corporate responsibility initiative in the world—with over 7,000 signatories based in more than 135 countries, and Local Networks existing or emerging in 90 countries. More information: www.unglobalcompact.org.

About Accenture
Accenture is a global management consulting, technology services and outsourcing company, with more than 249,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world’s most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US$25.5 billion for the fiscal year ended Aug. 31, 2011. Its home page is www.accenture.com.

About Accenture Sustainability Services
Accenture Sustainability Services helps organizations achieve substantial improvement in performance and value for their stakeholders. We help clients leverage their assets and capabilities to drive innovation and profitable growth while striving for a positive economic, environmental and social impact. We work with clients across industries and geographies to integrate sustainability approaches into their business strategies, operating models and critical processes. Our holistic approach encompasses strategy, design and execution to increase revenue, reduce cost, manage risk and enhance brand, reputation and intangible assets. We also help clients develop deep insights on sustainability issues based on our ongoing investments in research, including recent studies on consumer expectations and global executive opinion on corporate sustainability and climate change.

Find out more at www.accenture.com/sustainability

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The United Nations Global Compact and Accenture encourage leadership from all industries around the world to engage with the Sustainable Energy for All initiative. To do so, please contact:

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