



GBTA | Greater DC Metro

ARE YOU READY FOR 2023?

Welcome to
EDUCATION DAY

October 27th, 2022



Greater DC Metro Chapter Education Committee



Debbie Thomas

PRESIDENT
TAMS



**Carol McDowell-
Schrager**

ALLIED MEMBER AT LARGE
Onriva



Lee Feldmann

COMMITTEE MEMBER
Southwest Airlines

Greater DC Metro Chapter Full Board

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Direct Member at Large – Dawn Spriggs Hall – United Nations Foundation	Allied Member at Large – Carol McDowell-Schrager – Onriva
Director, Membership – Erin Sterling – The Henley Park Hotel	Director, Marketing - OPEN

Today's Agenda

- Industry Updates
- NDC
- Communications Style
- Spotlights
- RealID
- Sustainability
- Networking



**ARE
YOU
READY
FOR
2023?**



GBTA | Greater DC Metro

Industry Updates

By

Chris Ely

GBTA, Research Director

October 27th, 2022



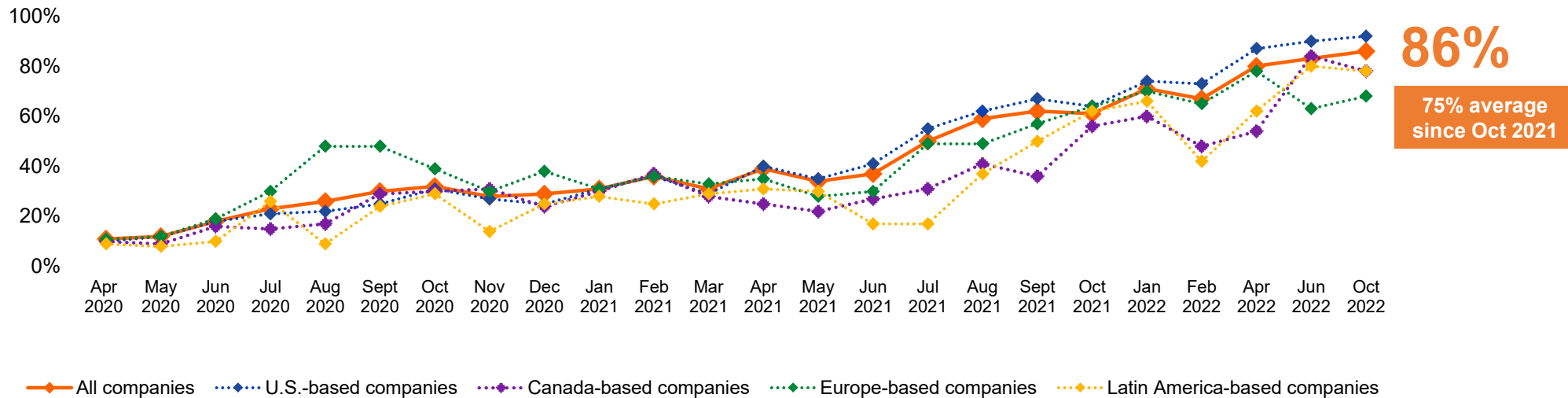
GBTA Global BTI™: Business Travel Timeline*



*Growth rates represent average annual growth over each period

The State of Domestic Business Travel

% of companies allowing some or more domestic business travel within their country

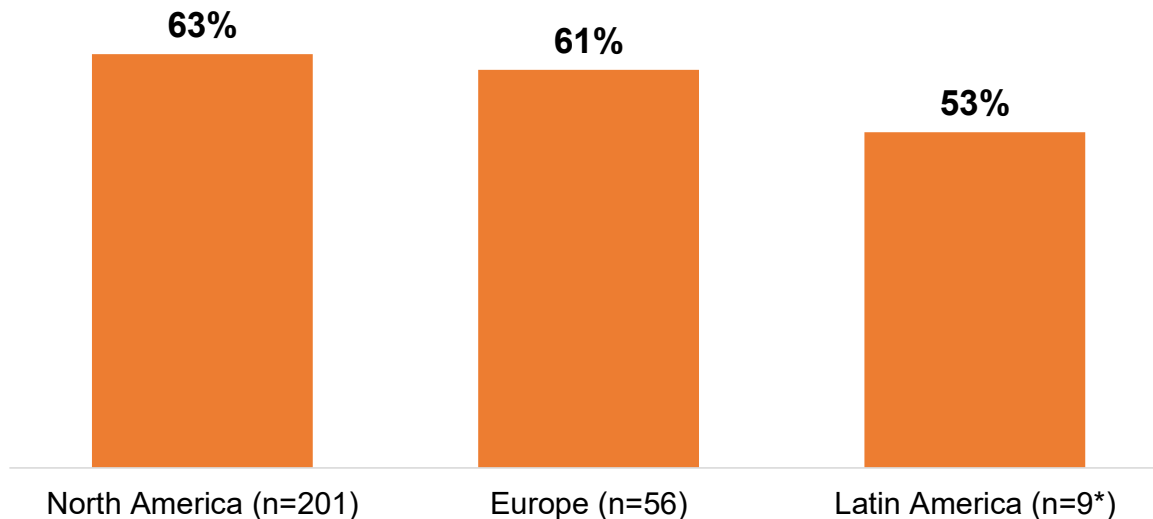


Note: Small sample size for Latin America-based respondents in recent polls (n<30)

Percentages calculated by subtracting the percentage who have canceled or suspended "most" or "all" business trips from 100

The State of Domestic Business Travel

Thinking about domestic bookings, are travel programs
currently at...?
estimated averages by region

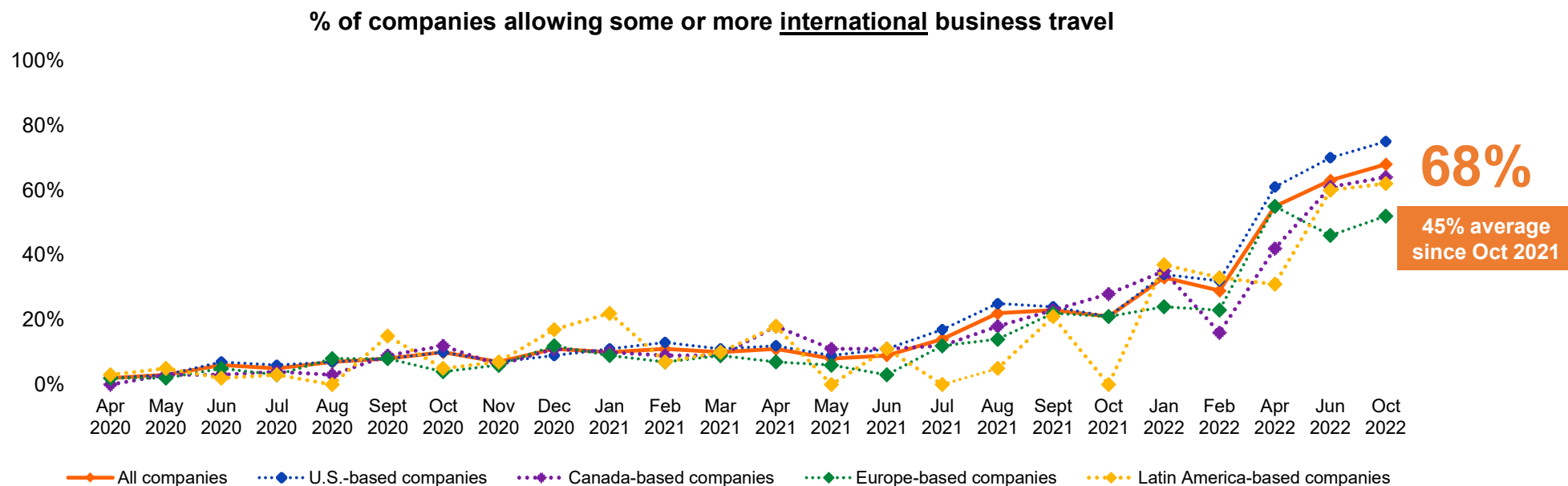


Q. Thinking about your company's current domestic business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? *Your best estimate is fine.* Note: Question only displayed to travel buyers/procurement professionals.

*indicates small sample size for Latin America (n<30)

- **Business travel recovery gains steam worldwide.** On average, North America-based travel managers estimate their company's **domestic** business travel bookings have recovered to 63% of the pre-pandemic level. This is similar to the average for Europe-based travel managers (61%).

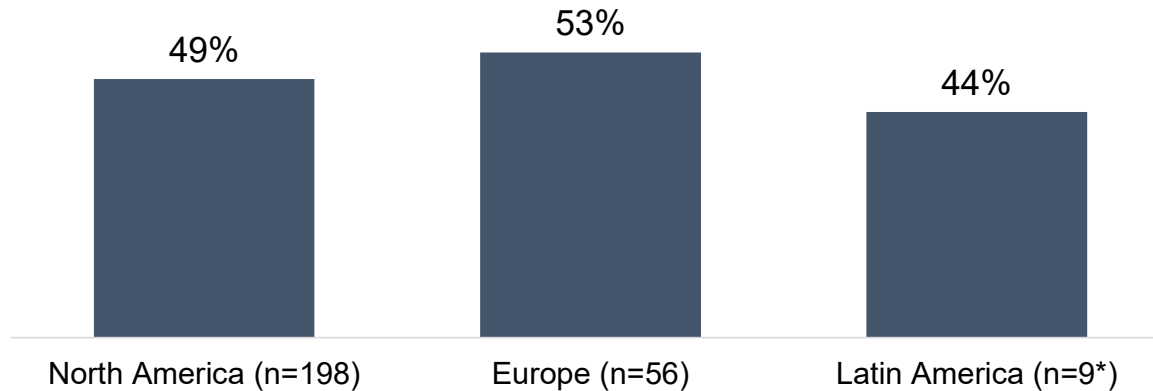
Challenges to International Business Travel's Return



Note: Small sample size for Latin America-based respondents in recent polls (n<30)
Percentages calculated by subtracting the percentage who have canceled or suspended "most" or "all" business trips from 100

The State of International Business Travel (Cont.)

Thinking about international bookings, are travel programs
currently at...?
estimated averages by region



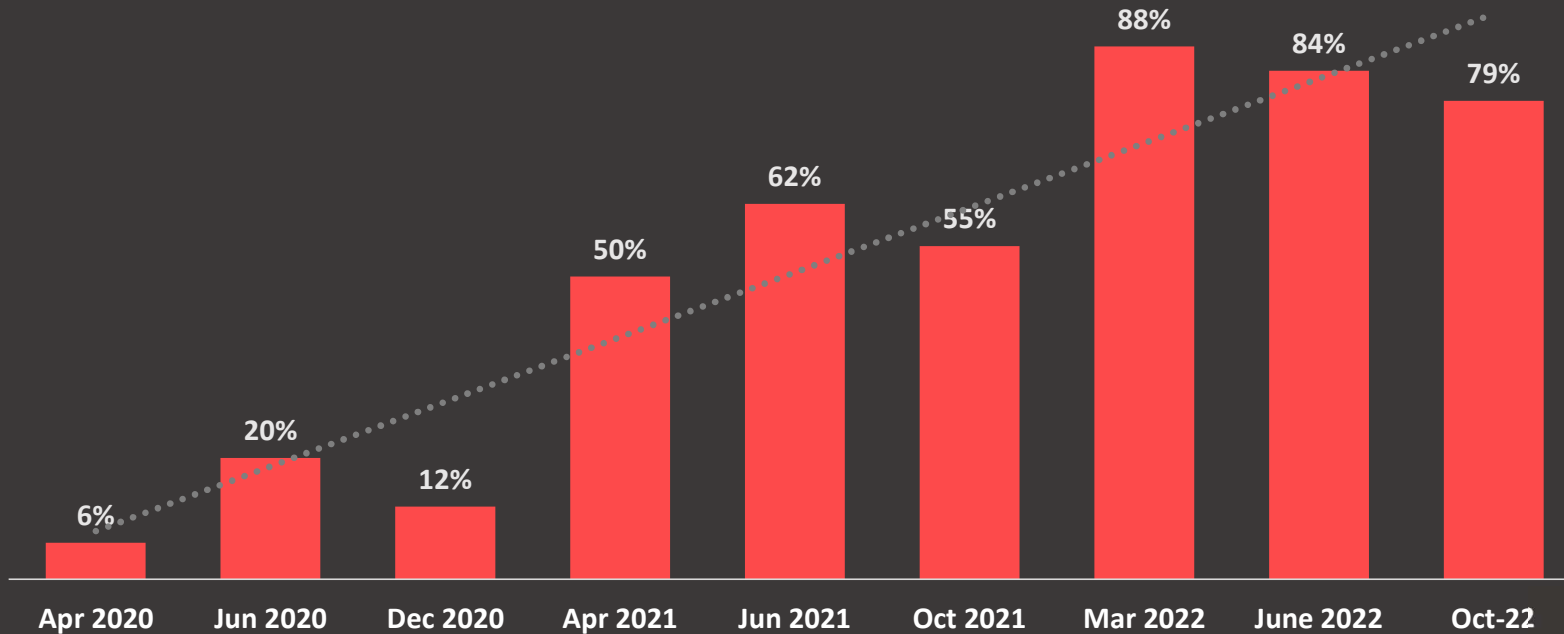
Q. Thinking about your company's current international business travel bookings, how do they compare to the pre-pandemic (2019) level? Would you say your company is currently at...? **Your best estimate is fine.** Note: Question only displayed to travel buyers/procurement professionals.

*indicates small sample size for Latin America (n<30)

- There is little difference in the pace of recovery of international business travel across regions. On average, North America and Europe-based travel managers estimate their company's international bookings have recovered to roughly half of the pre-pandemic level.

Supplier Bookings Growth Through Recovery

How have bookings from corporate customers changed in the past month?
(Supplier-reported increases)



Source: GBTA Business Travel Recovery industry Polls, 2020-2022

Are we there yet?

**\$1.4
trillion**

Annual global business travel
spending in US dollars, 2019

Source: 2022 GBTA Business Travel Index Outlook

- **Global rollout of vaccines and COVID decline**
- **Business traveler willingness**
- **National and corporate travel policies**
- **Easing of strained supply chains and work forces**
- **Combating inflation and increased costs (especially labor)**
- **Geo-political events**
- **Rate of recovery in Asia**

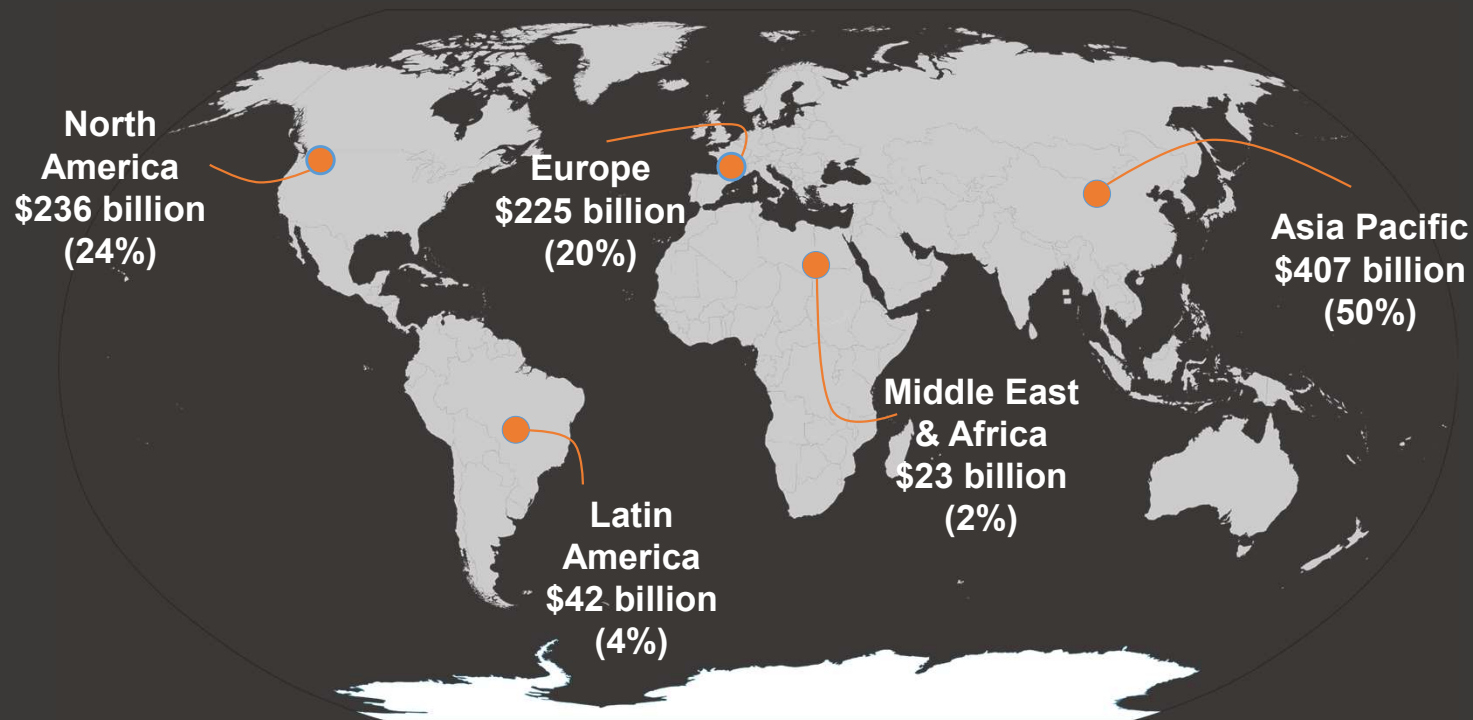


BTI Forecast: Global Business Travel Recovery 2022 - 2026

- **2021:** total spend **\$697 billion**, 5.5% above 2020; industry **gained \$36 billion** of \$770 billion lost in 2020
- **2022:** outpaces 2021 recovery, projected increase 34% to \$933 billion; recovery at 65% of pre-pandemic levels
- Economic conditions and shifting trends **slow global recovery**
- **2025:** spending will get close, reaching **\$1.39 trillion**
- **Mid-2026:** spending reaches and exceeds 2019 levels, forecast to reach **\$1.47 trillion**; adds ~18 months to 2021 forecast



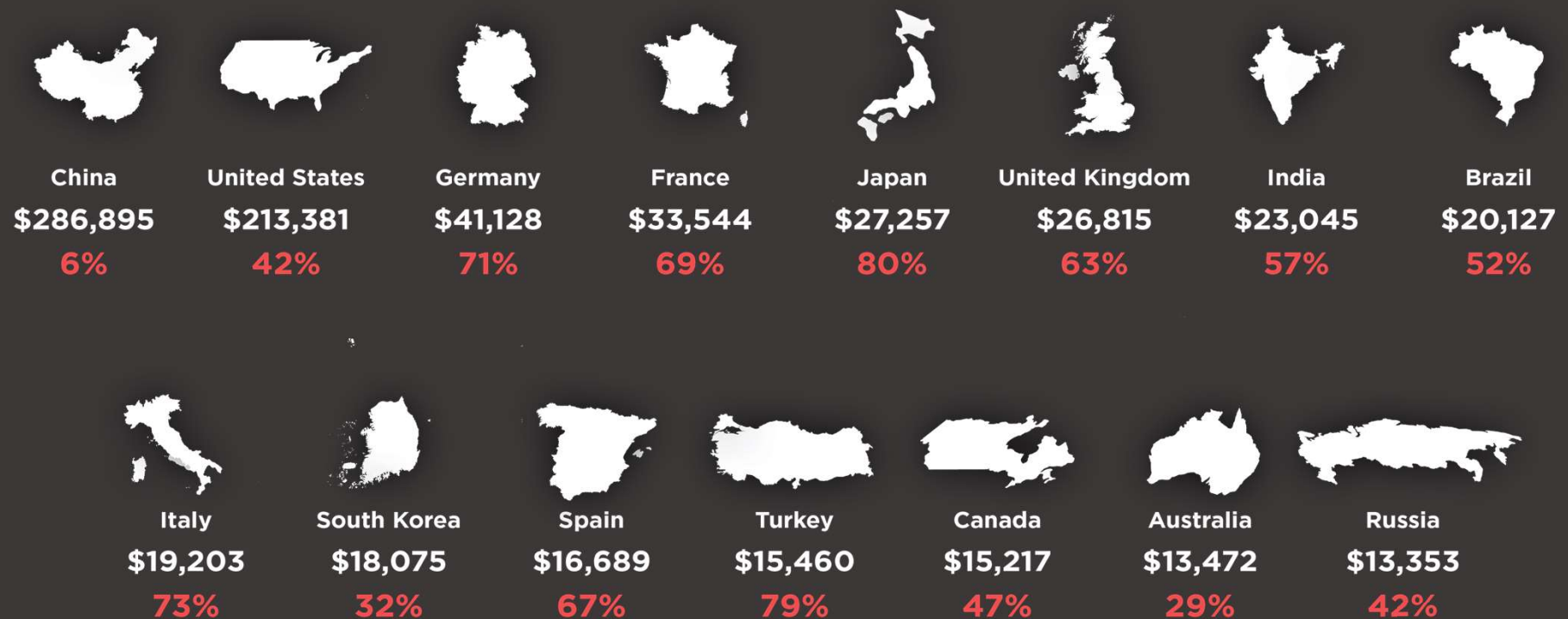
Spending on Global Business Travel Totaled Nearly \$700 Billion in 2021



Source: 2022 GBTA Business Travel Index Outlook
Source: Rockport Analytics, GBTA

Total Business Travel Spending (BTS) | Top 15 Markets (2022)

% Annual Growth in BTS (\$ Millions USD)



Source: 2022 GBTA Business Travel Index Outlook

The Forecast Ahead for Travel Pricing: Global

Airfares

AVERAGE TICKET PRICE

2022

\$646

2023

\$700

Hotel Rooms

AVERAGE TICKET PRICE

2022

\$147

2023

\$159

Car Rentals

AVERAGE TICKET PRICE

2022

\$44

2023

\$47

Source: 2023 CWT GBTA Global Business Travel Pricing Forecast



The Forecast Ahead for Travel Pricing: EMEA

Airfares

AVERAGE TICKET PRICE

2022

\$848

2023

\$910

Hotel Rooms

AVERAGE TICKET PRICE

2022

\$163

2023

\$170

Car Rentals

AVERAGE TICKET PRICE

2022

\$66

2023

\$68

Source: 2023 CWT GBTA Global Business Travel Pricing Forecast



The Forecast Ahead for Travel Pricing: APAC

Airfares

AVERAGE TICKET PRICE

2022

\$389

2023

\$416

Hotel Rooms

AVERAGE TICKET PRICE

2022

\$112

2023

\$116

Car Rentals

AVERAGE TICKET PRICE

2022

\$49

2023

\$50

Source: 2023 CWT GBTA Global Business Travel Pricing Forecast



The Forecast Ahead for Travel Pricing: North America

Airfares

AVERAGE TICKET PRICE

2022

\$719

2023

\$728

Hotel Rooms

AVERAGE TICKET PRICE

2022

\$177

2023

\$182

Car Rentals

AVERAGE TICKET PRICE

2022

\$42

2023

\$43

Source: 2023 CWT GBTA Global Business Travel Pricing Forecast



The Forecast Ahead for Travel Pricing: Latin America

Airfares

AVERAGE TICKET PRICE

2022

\$720

2023

\$755

Hotel Rooms

AVERAGE TICKET PRICE

2022

\$103

2023

\$109

Car Rentals

AVERAGE TICKET PRICE

2022

\$40

2023

\$42

Source: 2023 CWT GBTA Global Business Travel Pricing Forecast



Three-Quarters of Travel Managers (78%) Expect Their Company Will Take More Business Trips Next Year

What Do Travel Managers Expect for Next Year?



Q. Which of the following best describes your expectations for next year (2023) for your company's business travel?
Note: Question only displayed to travel managers/procurement professionals (n=272)

Despite Economic Concerns, Most Travel Programs Do Not Currently Plan to Limit Business Travel



Q Looking ahead to 2023, which of the following best describes your likely approach?

Note: Question only displayed to travel managers/procurement professionals (n=269).

Despite economic concerns, most travel programs do not plan to preemptively limit business travel next year. Only 8% of travel managers say their company is already implementing a plan to limit business travel because of economic concerns. An additional one in five (18%) are considering limiting business travel because of economic concerns. However, most are taking a wait - and-see approach (45%) or are unlikely to limit business travel (30%).

As Travel Suppliers Look Ahead to Next Year, Economic Concerns Surpass COVID Concerns

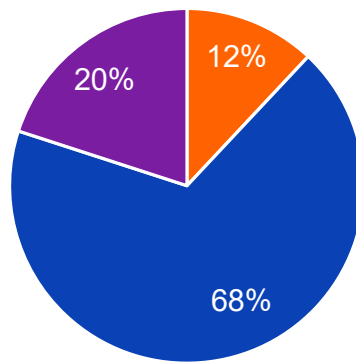


Q. Thinking ahead to next year, which of the following do you think is more likely to reduce or limit the growth of business travel bookings with your company? **Note: Question only displayed to travel suppliers/TMC employees (n=237).**

For more than two years, **COVID-19 loomed over business travel**. Finally, the industry appears to be turning a corner. Looking ahead to next year, COVID-19 is not the industry's chief concern. Four in five travel suppliers (80%) say economic conditions are most likely to limit business travel next year. Only 4% say COVID-19 is most likely to limit business travel next year.

Only 12% of Respondents Say Their Company Has a Full-Time In-Office Policy

Which of the following best describes your company's current in-office/work-from-home (WFH) policy?



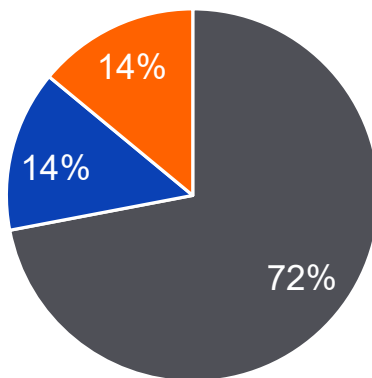
- Full-time in-office: Most employees are required or expected to report to the office most or all days
- Hybrid: Most employees are required or expected to work from the office some days – but are permitted to work from home other days
- Full-time remote: Employees are allowed or expected to work from home most or all days

Q Which of the following best describes your company's current in-office/work-from-home (WFH) policy? (n=526)

Most companies embrace hybrid or remote work

Many Travel Managers Think Flexibility to Work Remote Will Not Impact Business Travel

Will flexibility to work remote impact the amount of business travel?



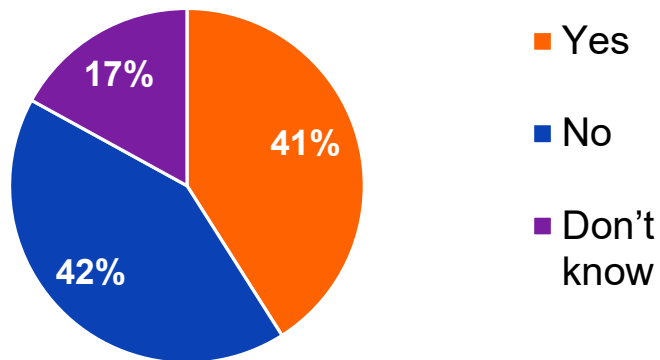
- Flexibility to work from home will not impact the number of business trips taken by our employees
- Flexibility to work from home will result in employees taking more business trips
- Flexibility to work from home will result in employees taking fewer business trips

Q You mentioned your company has a hybrid or remote work policy. Do you think this will result in more or less business travel? **Note: Question only displayed to respondents who indicated their company has a hybrid or full-time remote work policy (n=460)**

Almost three-quarters expect flexibility to work from home will not impact the number of business trips taken by employees.

2 in 5 Travel Programs See an Increase in “Bleisure” Interest

Have travel managers seen an increase in employees asking for blended travel/bleisure considerations?



Q Have you seen an increase in employees asking for blended travel/bleisure considerations?

Note: Results filtered to only show travel managers/procurement professionals (n=264)

A decent number of travel managers (41%) say they have seen an increase in employees asking to take “bleisure” trips where they add a vacation component to a work trip. This could be driven by remote or hybrid work policies that might allow employees to take bleisure trips without using vacation time.

Business Travelers and Finance Executives



85%

of business travelers need to travel to accomplish their business goals

3/4

of business travelers expect to travel more in 2023 than they did in 2022

1/2

of finance executives say their travel spending has returned to 2019 levels or will by 2022

84%

of finance executives say spending would increase in 2023

In-person meetings are more effective than virtual meetings

73%

of business travelers agree

84%

of finance executives agree

Inflation and economic recession overshadow COVID concerns

3/4

of business travelers agree

2/3

of finance executives agree

Expect COVID infection and variants to have an impact on their travel

68%

of business travelers agree

82%

of finance executives agree

Questions?

Chris Ely
cely@gbta.org



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15 Minute Break



NDC

Past, Present and Future

Tom Wilkinson – SAP Concur

Eric Hall – Southwest Business

David Weaver – Bechtel Travel Manager

Matt Beck – Serko

Jay Richmond - Amadeus

Moderated by:

Jay Campbell,
Company Dime

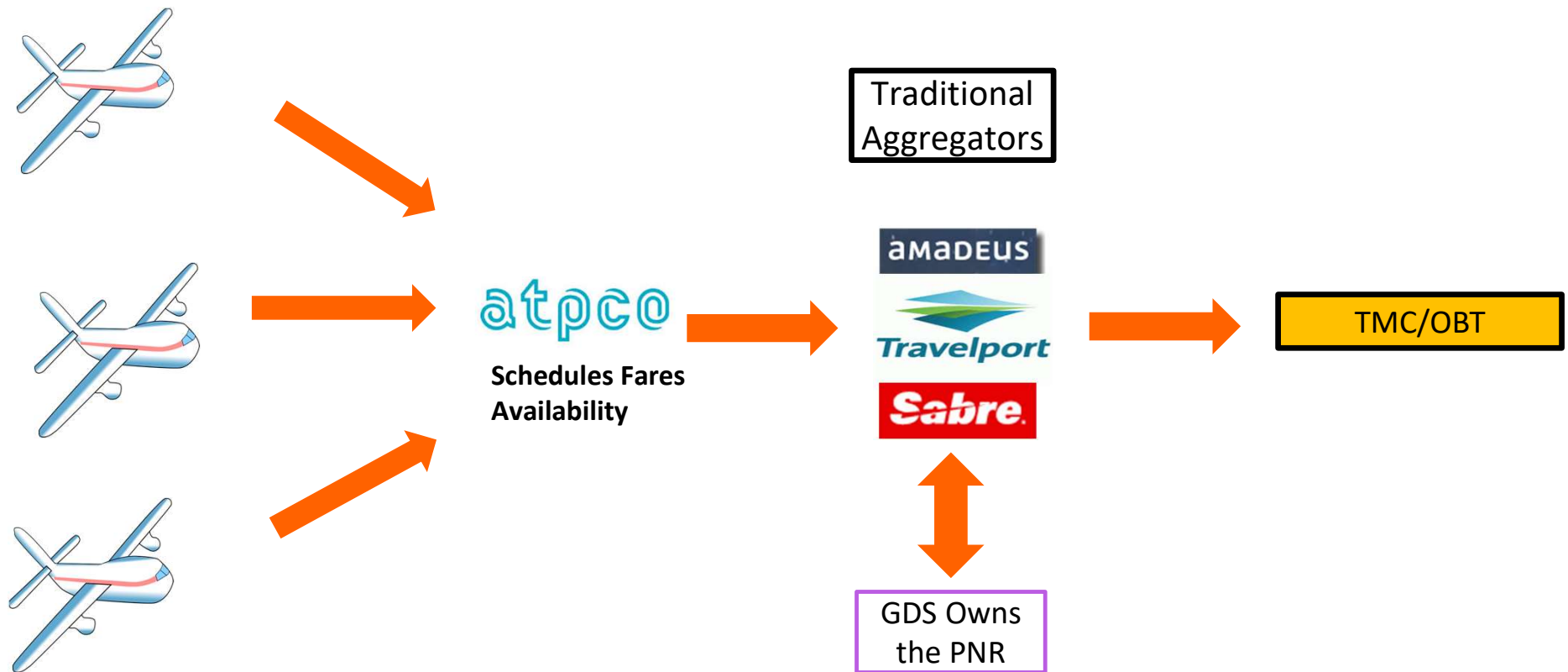
NDC: Why & How

Tom Wilkinson

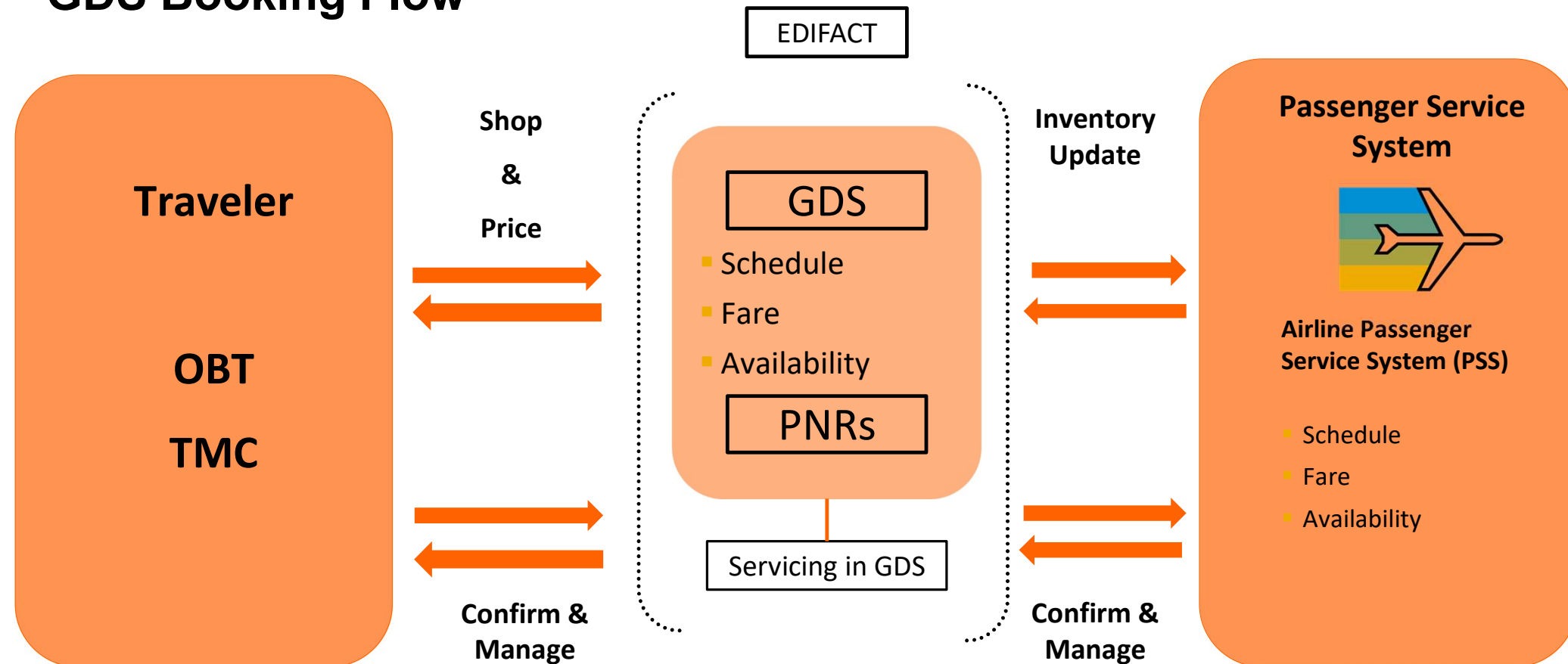
October 27, 2022



Airline Distribution Unchanged for Many Years



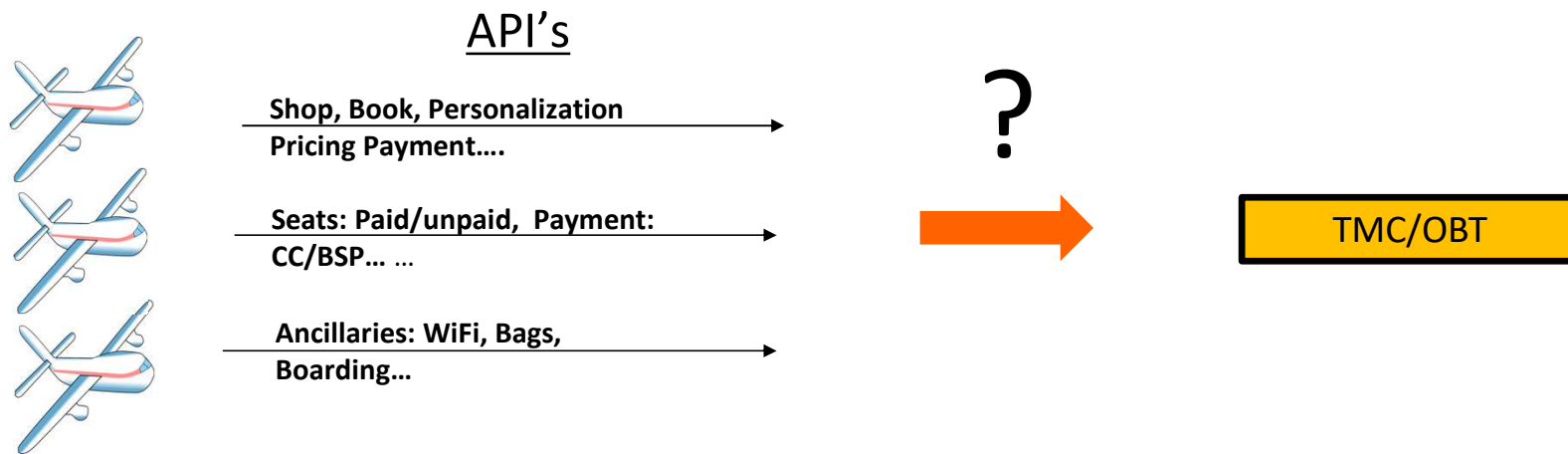
GDS Booking Flow



Electronic Data Interchange For Admin, Commerce & Transport developed by UN in 1987
Rules to structure messages across countries and industries

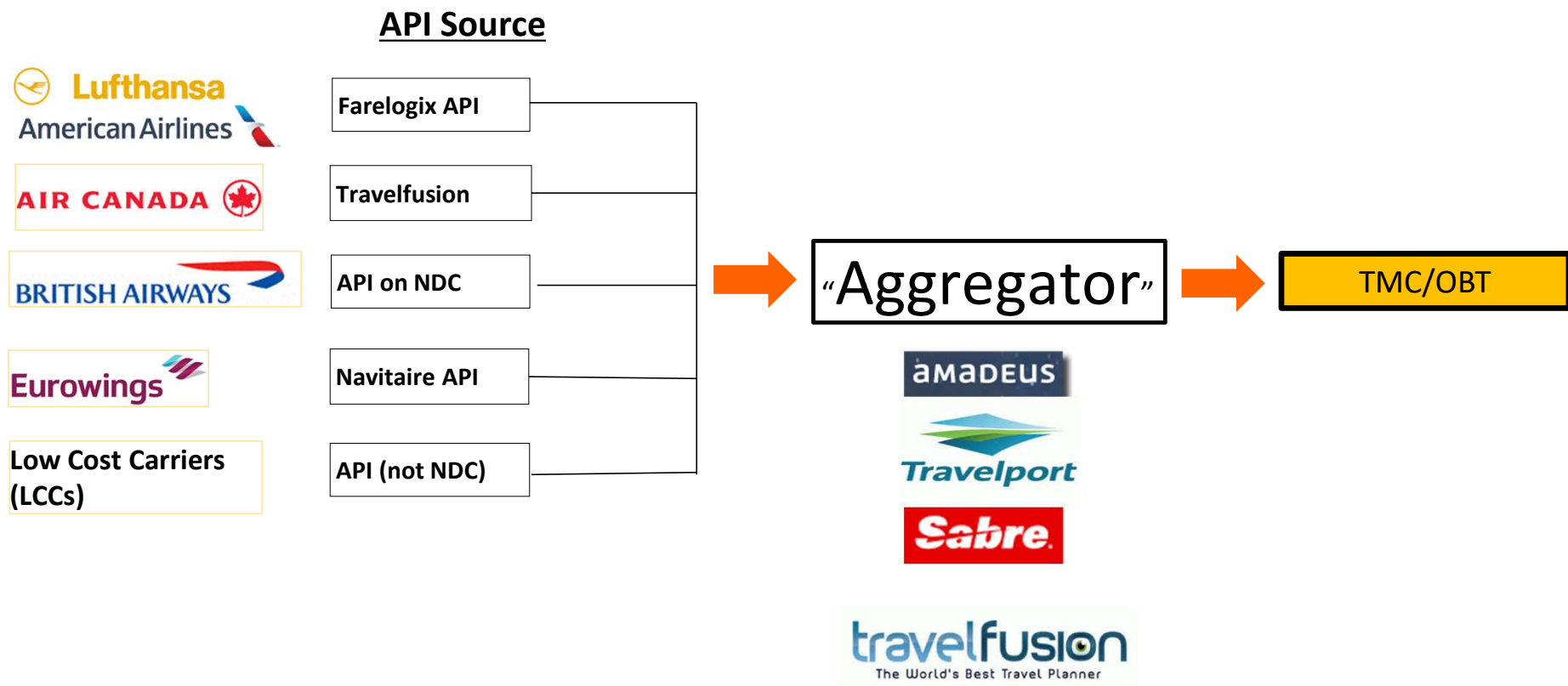
Edifact does not support modern e-commerce

Airlines wanted more flexibility to display services --> Merchandising

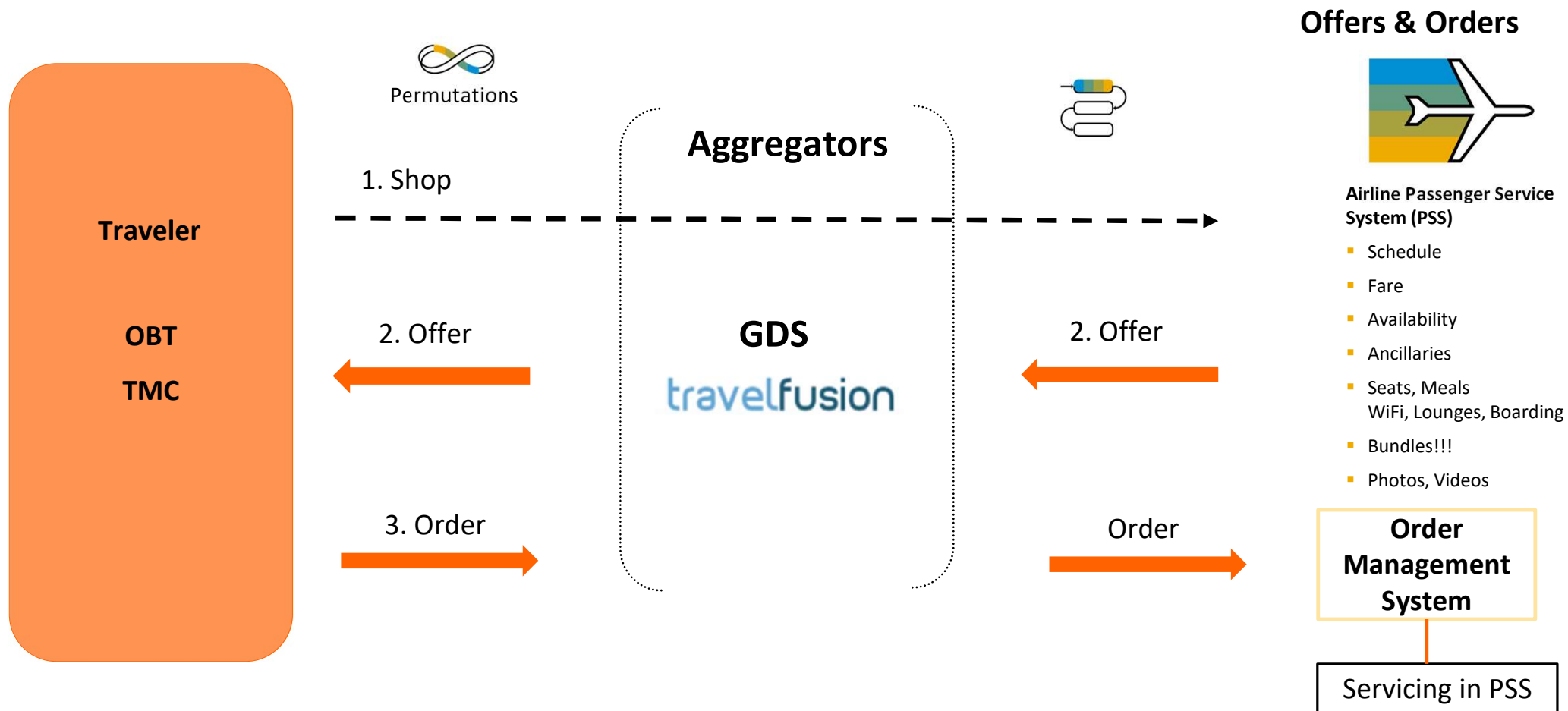


Needed a modern tool to support web services' arbitrary data structures

IATA NDC Schema → Not a Standard



NDC Replaces GDS PNRs with Airline Offers & Orders



Is it worth moving to NDC?

- **GDS Surcharges:** Mainly in EMEA and APAC
 - Some 'Private Channel' exemptions exist
- **Removing Content (Discounts) from Edifact Channel**
 - Lufthansa Light Fares can save €100 per segment
- **Corporate- Specific Deals:**
 - Rumors of very sweet deals for large corporate clients
- **US Carriers less-aggressive:**
 - AA Main Plus; United Bundles

It depends...

NDC

Past, Present and Future

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Moderated by:

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Company Dime



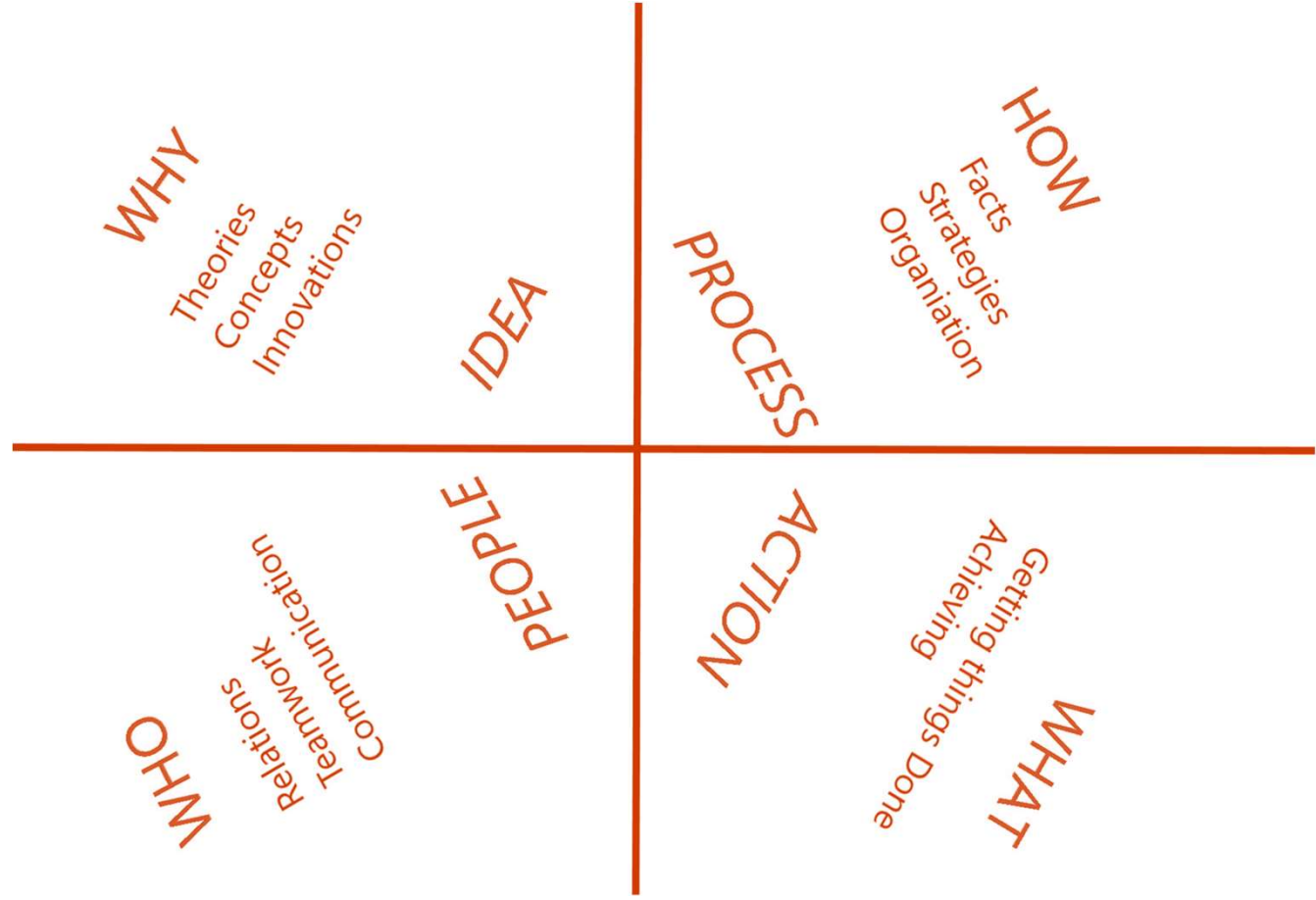
GBTA | Greater DC Metro



What's Your Communication Style?

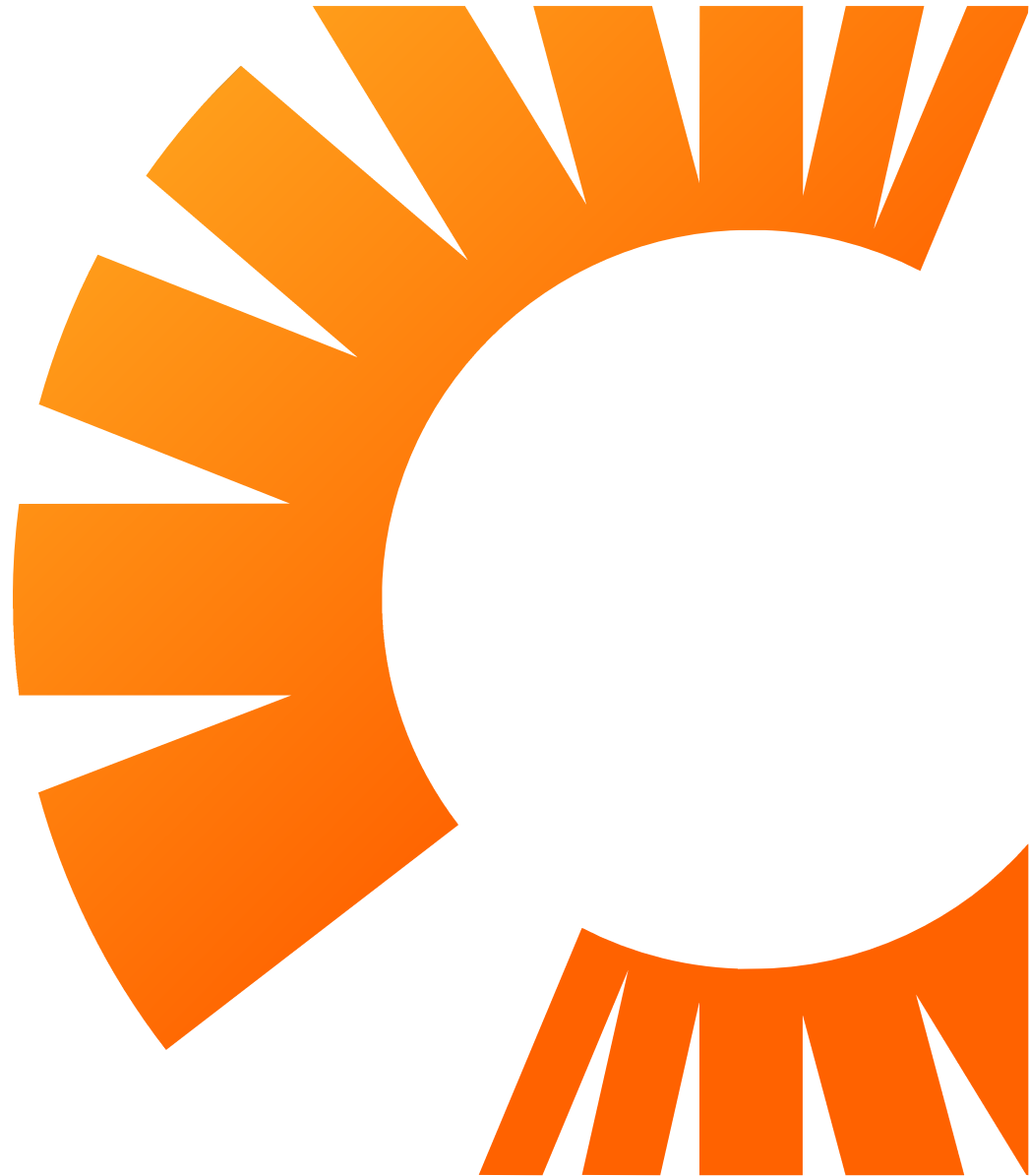
Presented By:
Debbie Thomas
DT & Associates, Owner

Overview of Communication Styles



Spotlights

CVENT
GetThere
Interim Homes
SIXT
Zeno by Serko





cvent

Bethany Janney
Sales Executive,
Sourcing and Housing Solutions



Gregg Ellsworth

Global Sales

Sabre Corporate Solutions



Tonia Jacobson
Business Development Manager



Jeff Urban

Director of Global Account Sales



Matt Beck
Senior Director Sales Operations



GBTA | Greater DC Metro

TSA REAL ID Update

Simone Davis
Enrollment Services and Vetting Programs, TSA

October 2022



REAL ID Act of 2005 Overview

Establishes minimum security standards for license issuance (regarding verification of identity, card design, and state processing)

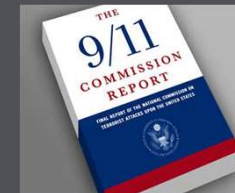
Prohibits certain federal agencies from accepting for certain purposes driver's licenses and identification cards from states or territories not meeting the REAL ID Act's minimum standards. These purposes include:

- Accessing certain federal facilities
- Entering nuclear power plants
- Boarding federally regulated commercial aircraft

Sources of identification are the last opportunity to ensure that people are who they say they are and to check whether they are terrorists."

--9/11 Commission Report

p.390



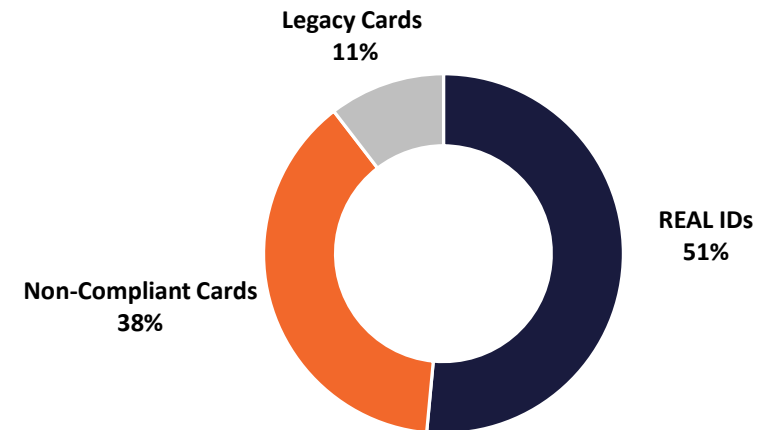
REAL ID Implementation Deadline

- On May 3, 2023 every air traveler 18 years of age and older will need a REAL ID-compliant driver's license or identification card, state-issued enhanced driver's license, or another acceptable form of ID to pass through TSA security checkpoints to fly within the United States
 - TSA's full list of acceptable IDs is available on <https://www.tsa.gov/travel/security-screening/identification>
- Industry should continue to prepare for REAL ID enforcement to begin on May 3, 2023

REAL ID Status

- 55/56 Jurisdictions Compliant
 - American Samoa in progress
- REAL ID adoption rate remains .5% per month
- Many adults have other Acceptable IDs
 - Passport, Fed-Recognized Tribal ID, EDL, Military ID
- REAL ID Modernization Act (Passed Dec. 2020)
 - Authorized Remote Application Process (RAP) to significantly increase REAL ID adoption rate
 - Established REAL ID-compliant mobile Driver's License (mDL)

Percentage Breakdown of State Issued DLs/IDs by Type



Communications and Engagement

Advertising and Marketing Campaign

- DHS National Awareness Campaign “Be Your REAL ID Self” launched Jan 2021
- Paid advertising ended Sept 27, 2021, but creative assets within the ‘campaign toolkit’ is still available for partners on <https://dhs.gov/real-id/campaign-toolkits>
- DHS/TSA are working to identify funding for conducting another multi-channel robust national awareness campaign, in coordination with public outreach efforts about the REAL ID implementation deadline

Partnership with Industry

- Conducting a sustained “full-court press” engagement with states, DMVs, airlines, airports, and other travel industry organizations, to build public awareness about REAL ID requirements and implementation date
- Essential that industry partners and states be a primary source of messaging to urge passengers to obtain their REAL ID, in addition to DHS and TSA efforts
- Incorporating REAL ID messaging into your communications will help mitigate potential customer and operational issues

REAL ID Implementation Preparation

TSA is coordinating agency-wide efforts to prepare for REAL ID implementation at TSA checkpoints, including:

- Upgrading Credential Authentication Technology (CAT) software to recognize REAL ID credentials and deploying additional CATs
- Aircraft Operator Standard Security Program changes
 - Requires aircraft operators to notify passengers of REAL ID requirements and implementation date during reservation, check-in, and at checked baggage locations beginning May 3, 2022
- Investigating technology solutions to support REAL ID implementation
- Designing a data collection and analysis capability to inform REAL ID implementation planning and execution

Path Forward

TSA Next Steps

- Engaging with industry to gain their support to inform the public of REAL ID, and other acceptable ID requirements
- Partnering with DHS to engage with states that have low rates of REAL ID adoption
- Requesting funding for a public advertising campaign to help inform the public on both REAL ID and other acceptable ID requirements
- Designing REAL ID implementation processes that:
 - Minimize the impact to security operations at TSA checkpoints and the traveling public
 - Consider the prevalence of REAL ID compliance at the TSA checkpoint
 - Protect the safety and security of travelers and TSA checkpoint personnel



It is too early to
estimate the impact of
REAL ID
implementation at the
TSA checkpoint.

Questions?

Email:

**David Lim (Executive Marketing Officer)
at David.Lim@tsa.dhs.gov, with a copy to**

**Simone Davis at
Simone.Davis@tsa.dhs.gov.**

Thank you.

15 Minute Break



What you should know about Sustainability



Three Different Perspectives

What you should know about Sustainability

+
THE COMBINED POWER OF



Sarah Mandell
Mobility Expert



Three Different Perspectives

+ THE COMBINED POWER OF





SUSTAINABILITY UPDATES



Enterprise and National are **committed to helping our customers achieve their business goals.**

Working with TerraPass to facilitate an easy solution for **customers to offset their carbon footprints** and fulfill their corporate sustainability objectives.

Negotiated a discounted rate for offsets to provide our customers with additional value.

Quickly growing our EV fleet, which comprises **several thousand vehicles** across our many corporate markets.



SUSTAINABILITY UPDATES



Enterprise is establishing 2025 goals based on an updated materiality assessment **with focus on Greenhouse Gas Emissions and Low Impact Products and Services, Water Conservation, Employee Attraction and Retention, and Diversity, Equity, and Inclusion.**

We select partners who share our commitment to upholding the **highest standards of quality**, integrity, excellence, safety, legal compliance, and regard for human rights, as well as to respecting the customs and culture of the communities we serve. **While evolving business practices to comply with environmental regulations.**

Enterprise Holdings is a **total transportation solution** and offers business lines like **Commute with Enterprise**, to help with sustainability.

Enterprise Holdings is committed to **investing in making our business and our world a better place** through key initiatives

What you should know about Sustainability



Niklas Eriksson
Sales Manager



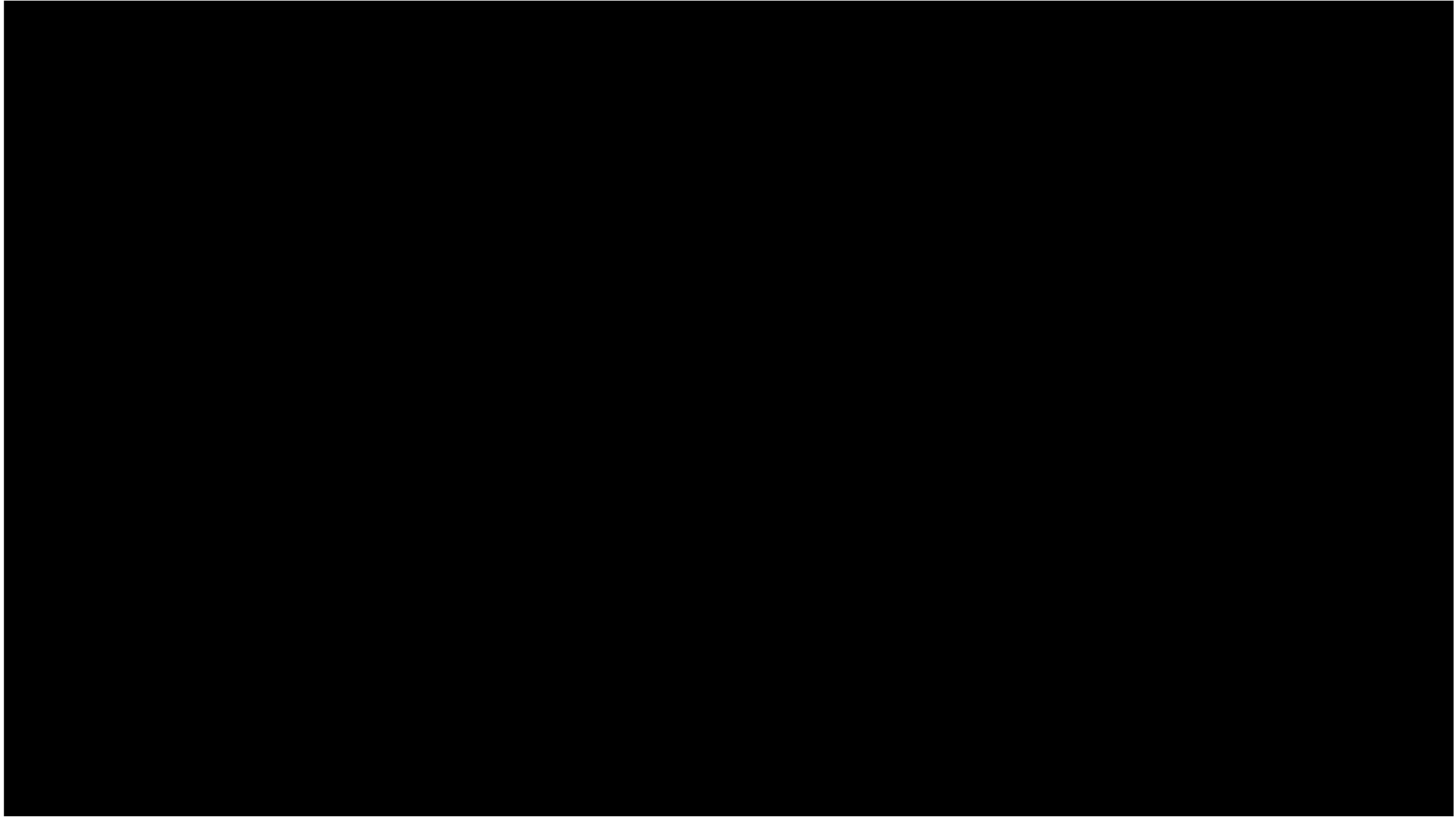
Three Different Perspectives

Building a Sustainable Aviation Future Together

Greater DC Metro Chapter of GBTA 2022
Education Day
October 27th, 2022

A STAR ALLIANCE MEMBER 

UNITED 
eco-skies 



Climate change has many potential impacts on United...

Increased fuel costs

- Emissions charges
- Temporary refining shortages

Higher temperatures

- Increased fuel use during takeoff / cruise
- Lower aircraft performance (payload / range)

Airport impacts

- More frequent runway maintenance
- Sea level rise

Increase in weather intensity

- Number of weather events
- En route turbulence
- Stronger headwinds
- Extremely low temperature events

Unexpected weather impacts

- Different prevailing winds
- Weather models no longer valid

Demand changes

- Reputation loss from being GHG-intensive
- Population relocation

...which is why we not only have aggressive goals, but are taking meaningful action to meet them

Our 100% green pledge

- 100% reduction in GHGs by 2050
- Interim goal of 50% intensity reduction by 2035¹
- Decarbonize without the use of offsets

CEO Scott Kirby

As an airline, we see our environment from a unique perspective every day and we know we must do our part to protect our planet and our skies.

I recognize our responsibility in contributing to fight climate change, as well as our responsibility to solve it.

¹ As compared to 2019

What can we do together?

Consider solutions that support a greener future

SAF Partnership

Join the
Eco-Skies Alliance



Partnering together to
increase SAF
placement & lower
corporate carbon
footprint

- ✓ Eco-Skies Alliance
- ✓ Investments in SAF producers

New Investments

Supporting technology &
infrastructure



Working together to
find alternative ways to
power aircraft beyond
petroleum

- ✓ 100% Green aircraft
- ✓ New engine technology

New Technology

Remove CO₂ directly
from the atmosphere



Investing together to
remove and store (or
repurpose) carbon
directly from the
atmosphere

- ✓ Carbon sequestration

Joint Education

Educate and advocate
travelers and influencers

Greenest flight

10:35 am ✈

Chicago, IL, US
(ORD - O'Hare)



Wi-Fi available



0.367 tonnes CO₂



Sustainably powered

Advocating together to
key stakeholders
about more
sustainable travel
choices

- ✓ Sustainability information in Jetstream
- ✓ Online booking tool optimization
- ✓ Traveler education/awareness
- ✓ Joint policy advocacy

What else is United Airlines doing to support a more sustainable future? The answer is investing, innovating and leading

Introducing



UNITED AIRLINES VENTURES 

SUPPORTING NEW TECHNOLOGIES
FOCUSED ON SUSTAINABILITY



INVESTING IN THE GREEN FUTURE OF
AVIATION –INNOVATIVE ELECTRIC
AIRCRAFT AND SAF-POWERED, 100%
GREEN SUPERSONIC AIRCRAFT



The largest aircraft order
270
in United's history

THE MOST FUEL-EFFICIENT FLEET.

EACH NEW AIRCRAFT IS UP TO 20%
MORE FUEL EFFICIENT THAN THE
AIRCRAFT IT IS REPLACING

THIS WILL REDUCE CARBON EMISSIONS
BY APPROXIMATELY 6 MILLION METRIC
TONS (equal to planting 36 million trees)

Did you know?

- The airline industry accounts for ~2% of global carbon emissions today
 - Without action, this number could grow to 20%+ as other industries reduce their carbon footprint
- For those who believe offsets are the solution, a tree needs ~55 years to absorb the CO₂ from a return NYC-LHR flight in economy
 - Offsetting does nothing to reduce the amount of carbon being emitted into the atmosphere
 - SAF however reduces carbon emissions by 80%-90% on a lifecycle basis
- In 2021, ~30M gallons of SAF were produced globally
 - By comparison, in 2019 (pre-pandemic), the airline industry used ~100B gallons of fuel globally
 - The issue is not a lack of interest in using SAF; the issue is availability and pricing of SAF
 - Hence, we need the support of customers and governments

SAF reduces carbon emissions at the source, making it a greener way to fly

Carbon offsets



- Pays for aviation emissions generated using conventional fuel
- Offsets have societal benefits, but do not directly reduce emissions from flying

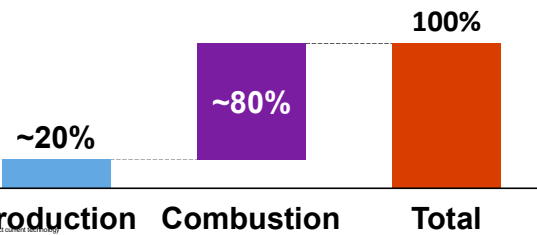
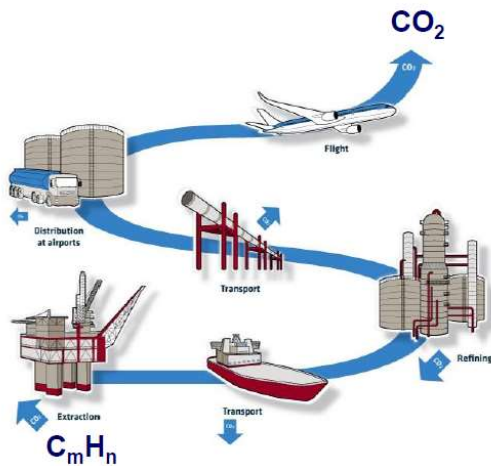
Sustainable aviation fuel (SAF)



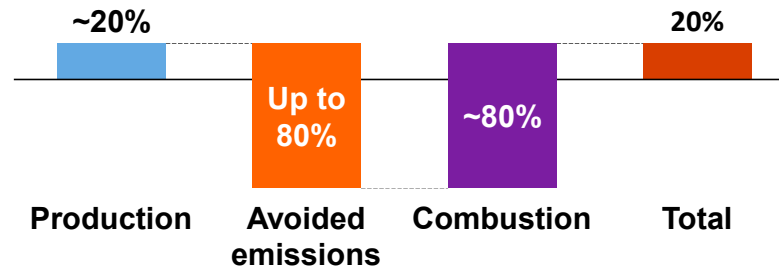
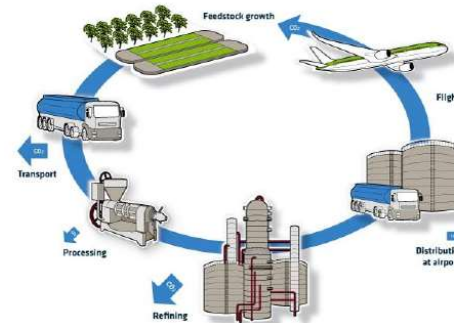
- Pays for flying on SAF derived from non-petroleum sources
- Due to a lack of scale, SAF costs more than conventional fuel
- Enables more sustainable flying—with the emissions problem solved **at the source**

Sustainable aviation fuel (SAF) is our largest opportunity to reduce GHG emissions

Petroleum-based (conventional) fuel Additional CO₂ released



Sustainable aviation fuel (SAF) Recycles CO₂ or avoids other GHGs



We believe that SAF emissions reductions are just the start of flying greener

Educating travelers to make more sustainable decisions

Greenest flight

10:35 am ✈ 1:20 pm **Nonstop**
Chicago, IL, US (ORD - O'Hare) San Francisco, CA, US (SFO) **4h 45m total**

Wi-Fi available
Sustainably powered

UA2050 Boeing 737 MAX 9
0.367 tonnes CO₂e

[Revise flight](#) [Details](#)

- Providing data to travelers will help them choose lower-carbon options
- Including SAF would lower travel emissions and drive travelers to increase SAF supply

Investing to reduce price premiums



- Paying price premiums for SAF forever is financially unsustainable
- We believe in making strategic investments to scale up SAF and bring down prices
- Only U.S. airline to have invested in a SAF producer—over \$30M to date

United works with four SAF companies and has the largest purchase agreements and investments globally

Current



- Purchase agreement of up to **5M gallons/year / ~19M liters/year**, started in 2016
- SAF produced from waste fats, oils, and greases using HEFA process
- Nearly 80% CO₂ emissions reduction
- Production in Paramount, California—then delivered to Los Angeles International Airport



- Equity investment of \$30M in 2015, the largest airline investment in SAF
- Purchase agreement of up to **90M gallons/year / ~340M liters/year** for 10 years, the second largest globally
- SAF to come from landfill waste using Fischer-Tropsch process
- Greater than 80% CO₂ emissions reduction
- Reno, Nevada facility finished construction in July 2021; Gary, Indiana planned

Future



Alder Fuels

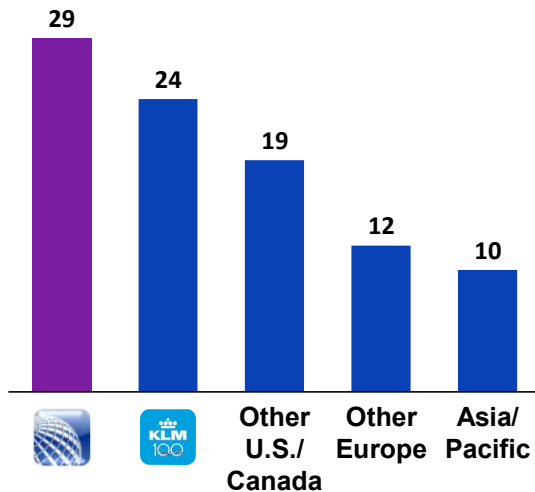
- Multimillion-dollar investment in 2021
- Purchase agreement for **1.5B gallons / ~5.7B liters** over 20 years, the largest globally
- SAF to come from biomass such as forest and crop waste
- Carbon-negative, 100% drop-in fuel
- Production expected to begin in 2025



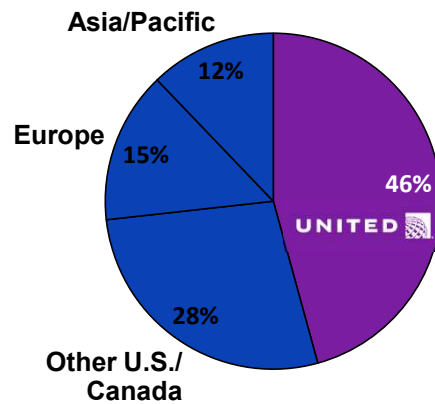
- \$5M investment to commercialize SAF production using CO₂ and synthetic microbes
- United and Oxy Low Carbon Ventures will fund development work and potentially form a joint venture to commercialize the technology

United remains the industry leader in sustainability—including plenty of SAF on the way for our customers

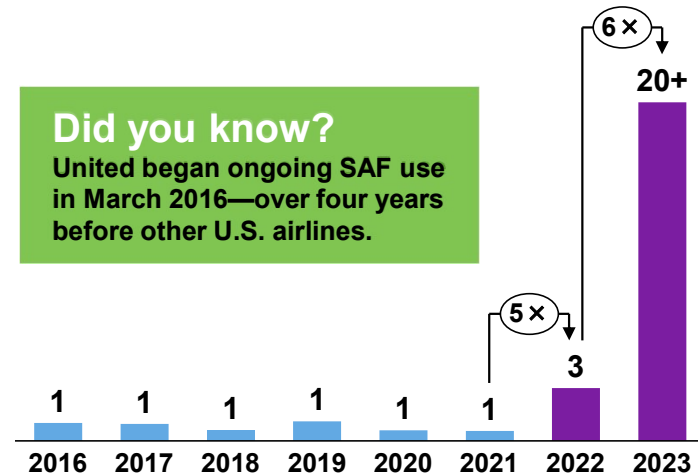
The most experience Publicly announced participants¹



The most SAF on order Publicly announced gallons (M)²



We have SAF available now Gallons (M)



¹ Publicly announced partnerships as of July 31, 2022

² Publicly announced commitments as of July 31, 2022

A More Sustainable Aviation Industry

Did you know ... ?

Addressing Carbon Emissions

- 98% of United's scope 1 (direct) emissions come from the burning of jet fuel used to power our aircraft. Solving for these emissions allows us to quickly reduce the carbon emissions we put into the atmosphere

Every flight departing LAX

- **Every United Airlines' flight departing LAX is powered, in part, by Sustainable Aviation Fuel (SAF).** United is the only airline at LAX to use SAF on every departure

Flying 100% Green

- In 2021, United operated the world's first flight powered by 100% SAF. The same year, **United also operated the world's first passenger flight powered by 100% SAF, with corporate and government partners onboard**

Eco-Airline of the Year

- United Airlines has won the prestigious ATW Eco-Airline of the Year award three times since the award inception in 2013, the most of any airline. In fact, each award winner has been a member of the Star Alliance

United Airlines is a leader towards a sustainable aviation future
Join us to advance innovative solutions



Eco-Airline of the Year winners

2013	2014	2015	2016	2017	2018	2019	2020	2021
	Not awarded						Not awarded	



NEW!

Sustainability Dashboard

Measure your carbon footprint on United

As a three-time Eco-Airline of the Year winner, it's no secret United has prioritized working towards the future of sustainable aviation. As part of this journey, we're bringing this eco-data directly to you. United Jetstream users* now have access to our new Sustainability Dashboard to help you navigate your environmental impact and help make more informed decisions. The new report features:

- Calculated carbon footprint on United Airlines
- Filters by route, departure month, equipment type, cabin, and more!
- Jet fuel gallons used, and how sustainable aviation fuel (SAF) can decarbonize your corporate travel

Log in to [United Jetstream](#) and click **More Reports > Sustainability** from the Dashboard to view your custom report.

*Only available to corporate account Jetstream users.

DID YOU KNOW?

- United is the only airline globally to commit to net-zero without traditional carbon offsets.
- In 2021, United operated the world's first flight with passengers powered by 100% SAF.
- Every United flight departing LAX is partially powered by SAF.

In the Eco-Skies Alliance program, we are partnering industry leaders to build a more sustainable future



- **What is it?** United customers coming together to take a bold step towards a more sustainable future
- **How does it work?** Customers fund the 'green premium' of SAF to enable more SAF supply; each customer is then allocated GHG reductions to claim against their emissions
- **Why does this matter?** Pressure to reduce corporate emissions is growing, with air travel especially challenging—until now
- **What's the difference?** SAF reduces emissions at the source, making it a greener way to fly



Direct reductions

SAF provides direct reductions within aviation, rather than buying carbon offsets that don't solve the core underlying problem



~80% less CO₂

SAF provides a nearly 80% reduction in CO₂ emissions—far more effective than the 15%-20% of flying on a newer aircraft



Made in California

United's SAF is produced ~15 miles from Los Angeles International Airport, the closest and fastest delivery to an airline from any SAF producer



Brand differentiation

Flying on SAF offers significant opportunities to differentiate your brand and demonstrate sustainability leadership—with customers and employees

We have nearly 30 customers participating from multiple industries, including:



- American Family Insurance
- Autodesk
- Biogen
- Bolloré Logistics
- Boston Consulting Group
- CEVA Logistics
- CWT
- Deloitte
- DHL Global Forwarding
- DSV
- HP Inc.
- Maersk
- Meta
- Microsoft
- Nike
- Palantir
- Palo Alto Networks
- Salesforce
- Siemens
- Takeda Pharmaceuticals
- Visa
- Yusen Logistics
- Zurich North America

UNITED



A STAR ALLIANCE MEMBER 

**We plan to land
on the green side
of history.**

**United is going 100% green by 2050 by reducing
our greenhouse gas emissions by 100%.
Learn more at united.com/100green**

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• fly the friendly skies™

What you should know about Sustainability



Kelley Kollock
Manager, ESG



Kim Napolitano
Executive Director

Three Different Perspectives

Travel with Purpose: Hilton's ESG Strategy

Hilton

Thursday, October 27, 2022

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Hilton

W
WALDORF ASTORIA

LXR

CONRAD

canopy

Signia
by Hilton

Hilton

CURIO
COLLECTION

DOUBLETREE

TAPESTRY
COLLECTION

EMBASSY
SUITES

TEMPO

MOTTO

Hilton
Garden Inn

Hampton

tru

HOMEWOOD
SUITES

HOME
SUITES 2

Hilton
GRAND VACATIONS

Hilton
HONORS

Evolution of ESG



Energy efficiency



Sustainability



**Corporate
Responsibility**



**Corporate Social
Responsibility**



ESG

**Where are you on your journey?
How does your company's CR/CSR/ESG goals direct your
business travel and meeting policies?**

Hilton

United Nations: Universal Framework for Paris





E

Environmental

PAVING THE WAY TO NET ZERO

CLIMATE ACTION
DESTINATION STEWARDSHIP



WATTS CARBON/ENERGY

Cut managed portfolio emissions intensity by **75%** by 2030

Cut franchised portfolio emissions intensity by **56%** by 2030

Drive toward a **net-zero** future



WATER

Cut water use by **50%** by 2030



WASTE

Cut waste by **50%** by 2030



S

Social

CREATING AN ENGINE OF OPPORTUNITY

HUMAN RIGHTS
DIVERSITY, EQUITY & INCLUSION



CAREERS

Create **5 million** learning and career growth opportunities for Team Members and communities with a focus on underrepresented groups by 2030



Achieve **gender parity** at global leadership levels by 2027



Achieve **ethnic diversity** in 25% of leadership levels in the US by 2027



COMMUNITIES

Meaningfully impact **20 million** community members by 2030



✓ Local Support

✓ Disaster Relief

✓ Economic Opportunities



CONDUCT

Promote responsible, inclusive conduct across **100%** of our value chain operations



G

Governance

ADVANCING AND MEASURING OUR GOALS

INTEGRITY
TRANSPARENCY



PUBLIC AFFAIRS

Advocate for public policies that advance our Travel with Purpose goals



PARTNERSHIPS

Create and partner with **cross-industry networks** to advance Travel with Purpose objectives



POLICIES & REPORTING

Operate through **best-in-class** measurement (LightStay), governance and oversight



GET READY FOR ...

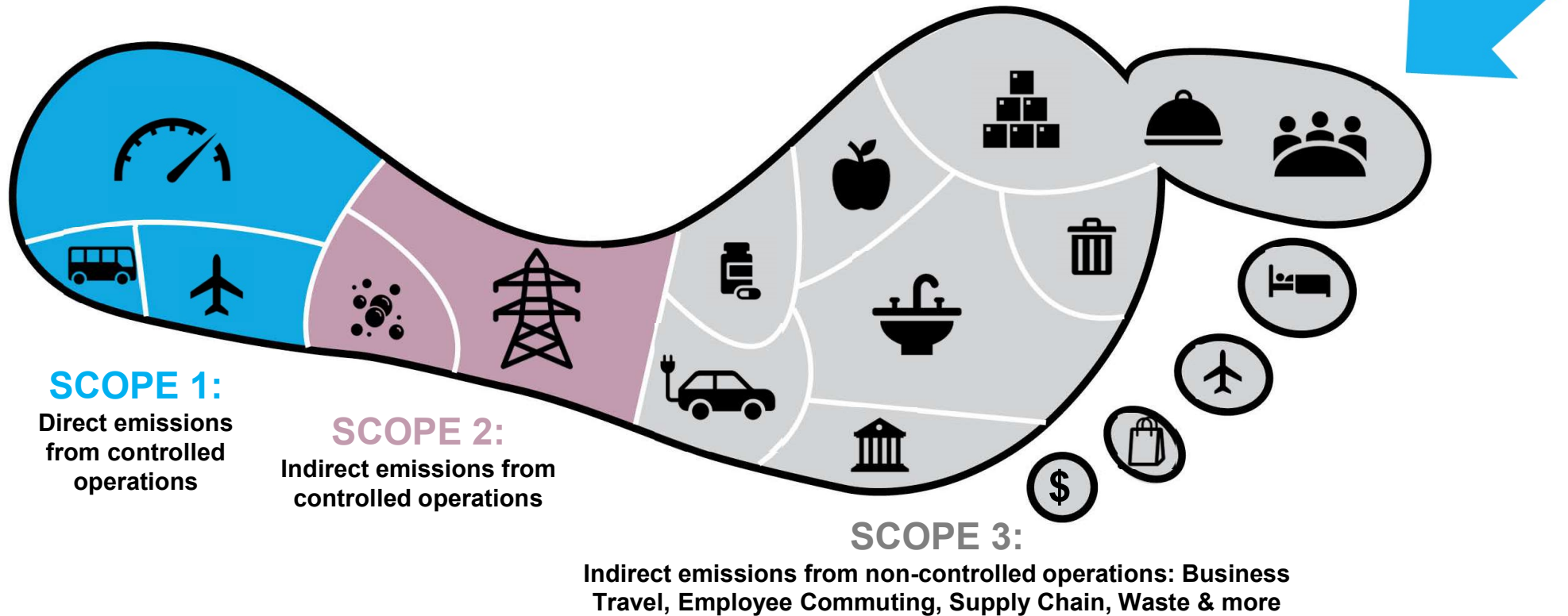
QUIZ TIME!

Question #1

What does **ESG** stand for?

Environmental, Social & Governance

HILTON LIVE What is a Carbon Footprint?



It's the total greenhouse gas emissions caused by an entity expressed as carbon dioxide equivalent

RECENT PROGRAMS DRIVING ESG PROGRESS



Meet with Purpose

- Our meeting and events program that is designed for customers to have more impactful meetings
- Meeting Impact Calculator and Carbon Neutral Meeting program



LED Lighting

- Brand Standard
- Cost savings, energy savings, fewer maintenance requests, and better guest experience



Digital Key

- Transition to Digital Key has saved well over 125 tons in plastic waste.



Electric Vehicle (EV) Charging Stations

- Charging stations are searchable on the Hilton website



Transition to Full-Size Amenities & Soap Recycling

- Partnership with Clean the World to recycle amenity bottles & soap, with a goal of sending zero soap to the landfills

Hilton

GET READY FOR ...

QUIZ TIME!

Question #2

Through Hilton's partnership with Clean the World, Hilton aims to send zero of this item to the landfill.

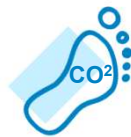
SOAP

LightStay

Data that works for you

- Global brand standard since 2009
- First major hospitality company to require sustainability measurements as a brand standard
- \$1 billion in estimated utility savings from sustainable operations
- Hilton hotels are ISO certified – the largest portfolio of ISO certified hotels in the world

LightStay keeps track of:



Carbon



Water



Energy



Waste



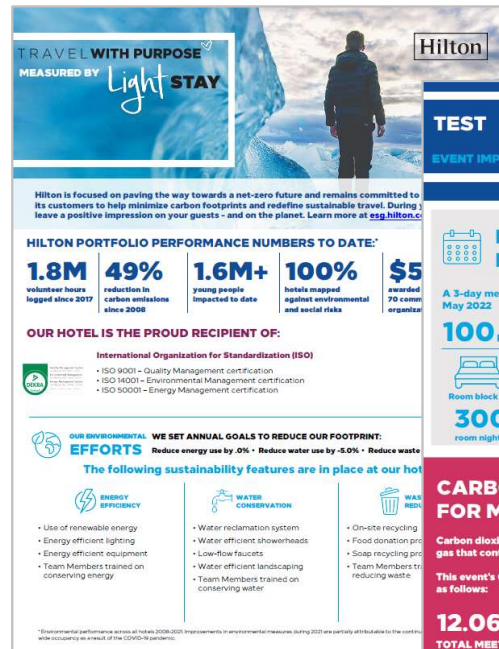
Volunteer
Projects



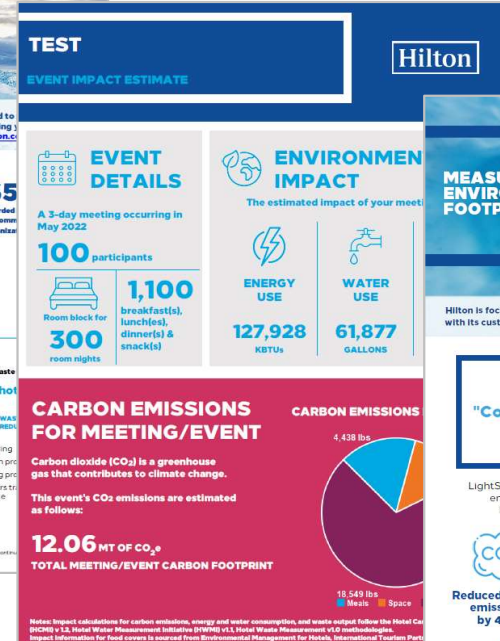
Donations

Smart Reporting

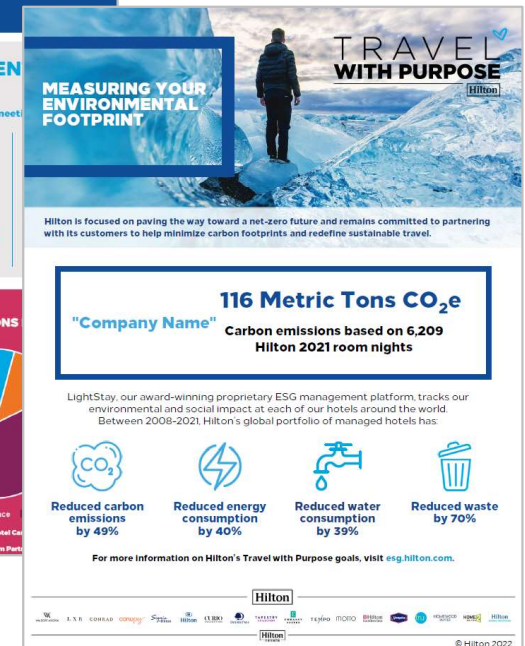
- LightStay enables hotels to track, analyze and improve their environmental and social impact
- Rich data set allows for bespoke, location-specific reporting from our hotels to their customers



Sales Report



Meeting Impact Calculator Report



Transient Room Night Emissions



GET READY FOR ...

QUIZ TIME!

Question #3

This Hilton report generates a customized estimate of your event's environmental impact using the hotel's consumption data to project the total carbon emissions, energy use, water, and waste.

LIGHTSTAY MEETING IMPACT CALCULATOR

Leveraging the Transient Room Night Emissions Report



- 1 **Request reports** in preparation of your meeting and QBRs with our team, request a Transient Emissions Report and LightStay Sales Reports for your top producing hotels.
- 2 **Engage** our team with your company's ESG subject matter experts as it relates to advancing your ESG body of work.
- 3 **Discuss sustainable initiatives** that are important to your company's priorities to engage your travelers in your ESG journey.
- 4 **Celebrate** your success within your organization!

MEET WITH PURPOSE

GATHER

Reduce your **environmental footprint** by making informed low-waste choices and consider offsetting your remaining carbon footprint.

NOURISH

Nourish with **climate-conscious menus** featuring locally-sourced, sustainably-grown meals designed to boost energy and minimize leftovers.

IMPACT

Impact the **local community** with opportunities that align with your ESG goals.

ASSESSMENTS & CERTIFICATIONS

EcoVadis

Hilton has been awarded a Silver medal as a recognition of their EcoVadis Rating

GSTC

Global Sustainable Tourism Council

Hilton's ESG management system achieved 'GSTC-Recognized Standard' status—the first major hotel chain to achieve this status

ISO Certification

Int'l Organization for Standardization

Hilton is the only major hotel brand to have achieved ISO certification across our global portfolio of hotels

GET READY FOR ...

QUIZ TIME!

Question #4

What is the one certification that recognized all 7,000 Hilton hotels for Quality, Environmental and Energy Management?

ISO Certification

Sustainable Travel Tips



Don't forget your reusables



Go mobile!



Choose sustainable hotels



Buy local and shop small



Plan—pack what you need.. Reduce weight of luggage



Nourish consciously

Q&A

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Kelley.kollock@hilton.com

Takeaways



Up Next...

****WebinarBytes****

Leakage 11/10/2022
Private jet 11/15/2022

****Holiday Party 12/1/2022****





Thank You!!

Networking Reception
In the Lobby Lounge
immediately following this event

