

Attitudes towards Environmental Responsibility among Swedish, Polish and Croatian Hoteliers

FULL PAPER

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Introduction

The very essence of tourism is based on the availability of a clean natural environment, while the tourism industry is simultaneously creating substantial pressure on the environment. The need for more effective measures is being increasingly endorsed globally by both guests and industry managers alike. Given its size and global presence, the tourism industry has the potential of becoming a significant venue of education, as it is exposed to the travelling public, a rapidly increasing portion of the world's population. However, reaching sustainability in mass tourism appears to be a near impossible endeavour. Achieving a greater degree of environmental responsibility within the tourism industry and among travellers is a challenge of significant proportion.

The hotel industry represents one of the major pillars of travel and tourism, and hotel facilities have been documented as possessing one of the greatest negative impacts on the environment among commercial/service buildings (second only to food service and health care). It is therefore crucial to induce a more environmentally sound development, operation and performance in this sector.

The successful implementation of more sustainable practices in the hotel industry is, nevertheless, highly dependent on the active support and cooperation of all stakeholders involved. The willingness and ability of hotel management to advocate and implement state-of-the-art environmentally responsible behaviour and practices is therefore imperative. Similarly, interest in environmental issues expressed by hotel guests, and their active participation in pro-ecological activities is both necessary and greatly appreciated.

The first step in creating a more environmentally sound hotel industry should be a performance analysis of the hotel sector from an environmental perspective. An assessment measuring the level of environmental awareness among hoteliers and their willingness/ability to exercise corporate environmental responsibility should be performed in order to reveal the strengths and weaknesses of a hotel-environment relationship. Unfortunately, only a limited

number of studies dealing with environmental attitudes and activities within the hotel industry are currently available. Two of the most comprehensive investigations include the 2001 Pricewaterhouse Coopers survey *European Hotel's Implementation of Environmental Policies* published in *Hospitality Directions – Europe Edition* in July 2001, and the 1999 *Worldwide Hotel Industry Study*, prepared and published by Horwath International and Smith Travel Research. The former includes results from leading European hotel operators accounting for approximately 10% of the total room stock. The latter is of a more global character and includes data from over 3 000 hotels (Vögl 1998). Unfortunately, neither of these publications have been available to the authors, indicating possible difficulties faced by hoteliers interested in reading these reports.

In an attempt to fill in the information gap a study of environmental awareness in the hotel sectors in Sweden, Poland and Croatia was conducted (Bohdanowicz 2003). The three countries investigated in this survey represent interesting case studies in respect to issues of environmental concern at different levels of society and economy.

Methods

A survey questionnaire was developed based on a comprehensive literature review, and questionnaires were prepared in Swedish, Polish and Croatian. It was comprised of twenty-two (23 for the Swedish sample) multiple-choice questions, occasionally supplemented by open-ended follow-up comments included for clarification. Two questions required the respondents to rank their answers using a 6- and 7-point Likert scale of importance (1 – least important, 6 or 7 – most important). In Poland and Sweden the questionnaires were sent to hotel representatives by way of e-mail. An additional 100 questionnaires were sent to Swedish hotels by air and surface mail. In Croatia, personal interviews were conducted by students. Hotel e-mail addresses for Sweden and Poland were obtained from the Internet and commercially available hotel directories, while in the case of Croatia, a list was provided

by the Institute of Tourism. The survey was performed in the Autumn of 2002 and Spring/Summer of 2003.

A total of 1923 hotels were targeted, 946 in Sweden, 942 in Poland, and 35 in Croatia, representing 61%, 97.5% and 27.1% of the existing stock in the region, respectively (Table 1). Three hundred seventy nine (379) correctly and completely filled-in forms were collected, accounting for an effective response rate of 25.5% for Sweden, 16.5% for Poland, and 85.7% for Croatia. In the Swedish and Polish samples the effective response rate was determined after excluding facilities with invalid e-mail addresses.

Table 1. Survey statistics.

Sample	Existing in the country	Sent/ distributed	% targeted	Completed answers	Effective response rate, %
Sweden	1550	946	61.0	225	25.51
Poland	966	942	97.5	124	16.51
Croatia	410	35	27.1	30	85.71

The sample size for target populations (Sweden, and Croatia) was relatively small and presumably biased, and may not fully reflect the populations at large. Typically, only representatives of hotels already involved in some type of pro-ecological initiatives chose to participate in the survey. Moreover, one person in the Croatian sample was responsible for 4 facilities (out of a total of 30 participating hotels). The format of the questionnaire may have rendered the potential respondents from answering it. A number of respondents commented that it was too long and complicated. Furthermore, some of the potential respondents may not have had the sufficient knowledge to answer the designated form.

The distribution of the questionnaire by e-mail may have additionally limited the respondents' willingness to reply. Surveys, especially those conducted by e-mail generally result in a very low response rate, typically ranging from 10.5% to 30.7% (Crawford-Welch 1991 as cited in Medina-Munoz & Garcíá-Falcon 2000). This is believed to be partially attributed to the lack of direct personal contact in e-mail based communication, resulting in a perceived lesser obligation to respond. The relatively low response rate might further reduce the depiction of

the sample. No support from local/national hotel or tourism associations was granted despite the fact that it was requested.

All of the mentioned aspects have had an influence on the final outcome of the survey, consequently limiting the portrayal of the sample represented. Despite statistical constraints, the trends identified from the data collected are still believed to provide a reasonably realistic impression of the current situation.

Tourism and Hotel Markets in Investigated Countries

Europe has traditionally been a major tourism market, accounting for more than half of all global tourist arrivals. Almost 400 million international tourists visited Europe in 2002, comprising 56.9% of global arrivals (WTO 2004). Six European countries remain on the top-ten list of world favourite destinations, with France leading the ranking, followed by Spain. In 2002 Poland ranked ninth on the list of major European tourist destinations, followed by Croatia in 15th place. Sweden was outside of the top-twenty ranking (WTO 2004).

Consequently, Europe represents a major hotel market accounting for 55.6% of all world hotels and 40% of all hotel beds in 1997 (Olsen et. al. 2000). According to EUROSTAT, slightly more than 197 000 hotels and similar establishments were operating in European Union member countries in 2000, offering a total of 9.3 million beds (Schmidt 2002). The majority of European hotels are independently owned and managed, with only 20–29% representing some type of chain affiliation (Johnson & Iunius 1999; Olszewski 2003). Today, however, a radical reorganisation and consolidation is gradually changing the profile of the European hotel market, and international corporations are steadily establishing their position. Two trends of expansion can be clearly distinguished (Marsan 2001). A number of companies are focusing on the growth of key markets, as is the case in Scandinavia (Hilton acquired Scandic Hotels AB in 2001), and Central and Eastern Europe (Accor purchased of shares of the Polish main hotel chain Orbis in 2000). The second trend is referred to as the “gateway city approach”, with hospitality firms establishing their presence

primarily in capital cities and major trade centres, then moving to secondary and tertiary markets (Radisson SAS and Marriott International appearing in major Central and Eastern European cities).

The Western hotel industry is a relatively well-developed market. As a consequence, the most attractive locations are already occupied. Markets in the Northern and Southern parts of Europe are conjointly expanding, however Central and Eastern Europe still attract the major attention of international hospitality enterprises (Johnson & Lunius 1999). Among the primary advantages of investing in these markets are geographical factors, such as the proximity to major European markets, vast areas of relatively untouched and unspoiled countryside, and cultural diversity.

Sweden

Sweden is one of the largest countries in Europe, with a total area of 450 000 km² and population of 8.9 million (SCB 2003). According to the Swedish Tourism Authority (STA), the number of nights spent by tourists in commercial accommodation facilities amounted to over 44 million in the year 2003 (approximately 9.7 million were foreign visitors, Figure 1) (STA 2004).

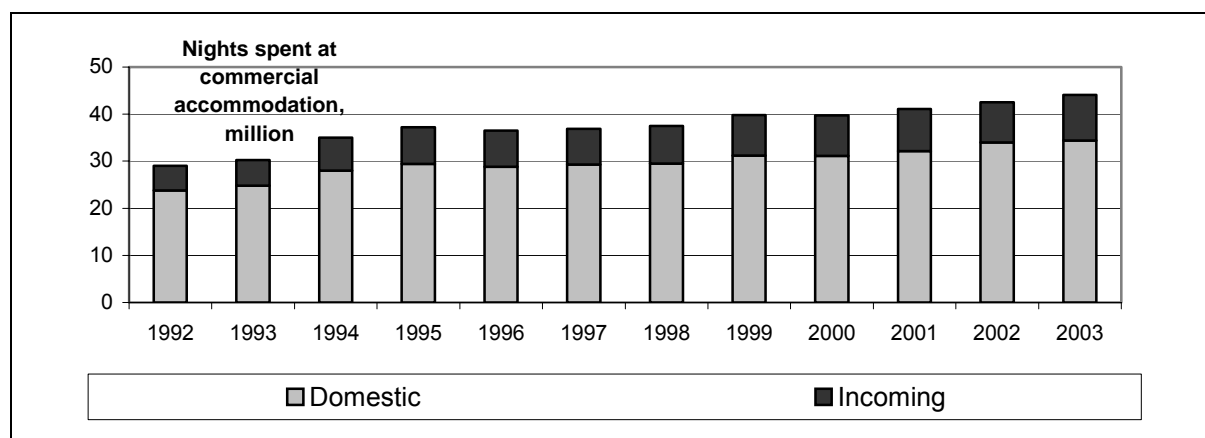


Figure 1. The development of tourism in Sweden, millions of nights spent in hotels, holiday villages, youth hostels and camping sites (STA 2004).

The same year total tourist consumption in Sweden, i.e., tourism expenditure, amounted to US\$ 21.07 billion (SEK 163.5 billion). Foreign leisure tourists spent on average US\$ 54 per

day (SEK 419/day), while for business trips the value was estimated at US\$ 134.5/day (SEK 1044/day). The numbers for domestic leisure and business tourists are US\$ 45.11/day (SEK 350/day), and US\$ 211.2/day (SEK 1639/day), respectively (STA 2004). Approximately half of all nights spent by foreign visitors in Sweden were at hotel facilities.

A successful promotion of Sweden as a tourism and conference destination has resulted in a 40% increase in accommodation demand over the last decade, met by a 14% increase in supply (STA 2002). The hotel industry in Sweden is well established and hotel premises range from old manor houses and castles that offer accommodation (e.g., Sundbyholms Slott at the lake Mälaren), to modern skyscrapers, and city hotels, and an establishment that is globally unique, since it is repeatedly built every year from snow and ice, i.e. the Jukkasjärvi Ice Hotel ® in Lappland.

In 2002 approximately 1976 hotels were in operation in Sweden offering a total of 194 839 beds in 99 267 rooms (STA 2002). Twenty-one point one million overnight stays were recorded in hotels in 2003, at an average occupancy rate of 46% (STA 2004). Business guests, representing 70% of all hotel customers, dominate the market (CHOSE 2001). Major hotel markets in Sweden are located within the cities of Stockholm, Göteborg, and Malmö, with Stockholm being one of Europe's strongest markets. The Arlanda (airport) market is the fourth largest hotel market in Sweden after the three cities mentioned. Hotel rooms in Stockholm ranked fifth among the most expensive in Europe in the first quarter of 2003 (US\$ 166/night) (Świat Hoteli 6/2003). Milan was the most expensive at US\$ 200/night, followed by London, Paris and Frankfurt.

The Swedish market is dominated by independently owned and managed facilities, with only some 570 – 580 affiliated hotels present on the market (Capona 2002; Granhed & Andersson 2003). In addition, a number of voluntary marketing associations are operating on the Swedish market. Affiliated hotels accounted for 71% of the total hotel revenue in the year 2002 (Granhed & Andersson 2003).

The average hotel facility in Sweden has 50.2 rooms, while the largest, Hotel Gothia Tower in Gothenburg, has 704 rooms (Pandox 2002). Total investment in both the hotel and restaurant industry over the next few years is estimated to be between US\$ 0.5 – 1 billion (SEK 5 – 10 billion) with overall investment dominated by the hotel industry (SHR 2003).

Among contemporary trends within the Swedish hotel industry, one merits special attention. Environmental issues have always been among the top priorities in Scandinavia. In 1999 SIS Miljömärkning introduced a Nordic Swan eco-label for hotel businesses, and since then a large number of hotels have received this award, attributing to the allocation of a total of 71 certificates, as of May 18, 2004 (Nordic Ecolabelling 2004).

Poland

Poland is the largest among the ten new EU-member countries. It has an area of 322 577 km² and a population of over 38.6 million (GUS 2001).

In 2003, the number of foreign tourists (visitors who stayed in Poland for at least one night) amounted to 13.7 million (Figure 2) (IT 2004 a), while the total tourism expenditure corresponded to US\$ 4.07 billion (IT 2004 b). On average, the foreign visitor to Poland spent US\$ 24 per day in 2003. Approximately 33 per cent (32.5%) was attributed to accommodation (IT 2004 b). In 2002, 45.1% of all tourists stayed in hotels (IT 2004 c).

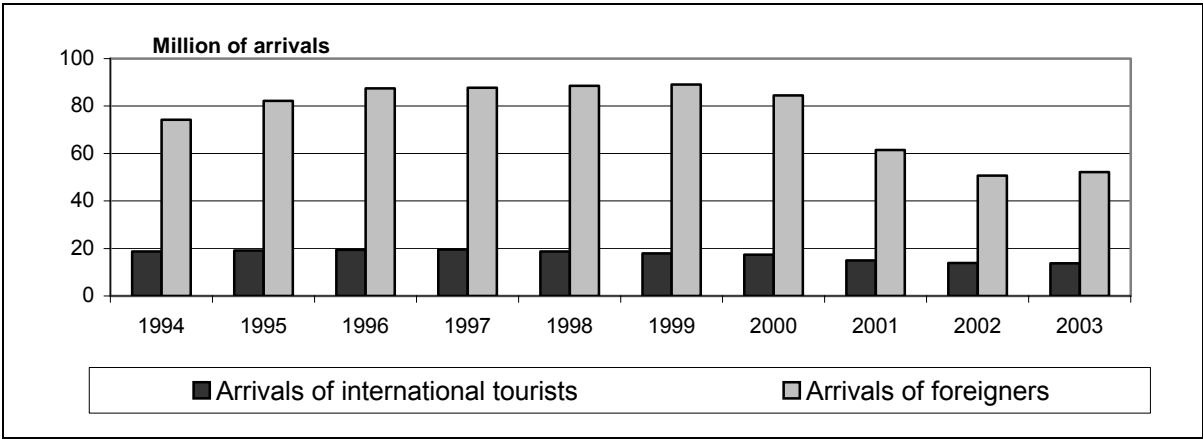


Figure 2. Inbound traffic to Poland, million of arrivals (IT 2004 a).

Political stability and economic growth during the last decade, as well as the potential size of the market, has stimulated investment in the hospitality segment. As a result, between

1994 and 2001, the number of hotel rooms increased by 6.5% and hotel beds by 4.3%, while hotel stock grew by 11% between 2001 and 2002 alone (IT 2003).

By the end of July 2002, 1070 hotels were operating in Poland, offering a total of 57 621 rooms and 109 293 beds (GUS 2003). The hotel market is dominated by three- and two-star properties (42% and 23%, respectively), however five- and four-star establishments experienced the highest occupancy rates in the year 2002 (51.3% and 44.8% as compared to 37.9% and 34.3% for 3- and 2-star hotels, the country's average occupancy rate equalled 36%) (IT 2003).

Approximately 35% of the accommodation stock in Poland was owned by private individuals in 2000, followed by the State Treasury, state- and municipally-owned premises (23%, 19% and 17%, respectively) (Łopaciński 2001 as cited in Natucka 2003). Foreign entities owned approximately 6% of the stock at the beginning of the millennium. Today the situation is slightly different, since many international hotel companies have been steadily expanding and establishing their own positions on the market. In 2002, nineteen international and national hotel corporations were operating on the market (Świat Hoteli 9/2003; Witkowski 2003).

The hotel market in Poland is still relatively undeveloped compared to Western Europe, however, there is a strong belief that the situation will eventually change (Karczewicz 2000). The Institute of Tourism predicts a consistent expansion in the demand for hotel facilities in the coming decade. Despite the difficult times faced by Polish hoteliers (low occupancy, and recent cuts in new investments), the hotel stock owned/managed by international hotel corporations is expected to increase by approximately 20% in the next few years (Karczewicz 2000). Two major trends underway are the construction of two- and three-star properties (Express by Holiday Inn, Four Points by Starwood, Etap by Accor), as well as the renovation and improvement of the standard and quality of services in existing facilities (e.g., Orbis) (Hotelarz 3-5/2003; Świat Hoteli 5-7/2003). Two-star, economic type facilities are generally seen as having the greatest development potential (high interest from both

Polish and foreign visitors) and lowest investment risk. Extended-stay hotels are also experiencing an increase in popularity (Świat Hoteli 6-7/2003). On the other hand, the renovation and modernisation of existing hotels is necessary as most of the facilities in prime city locations were built during the 1970s, with frequently substandard interior design technology and construction materials. Furthermore, a number of international companies are expected to enter the market in the future (e.g., Hilton, InterContinental, Marriott and Radisson) (Hotelarz 3-5/2003; Świat Hoteli 5-7/2003). The continuous development and wide incorporation of information technology, general computerisation and automation of hotel facilities and reservation systems are imperative for conforming Polish facilities to the standards of EU hotels. Environment-related issues have additionally become a growing concern in the hotel industry.

Croatia

Croatia is a relatively small country in Southeastern Europe, by the Adriatic Sea. It has an area of 56 542 km² with a coastline length of 5835 km², and a population of 4.44 million (according to official statistics in 2001) (About Croatia 2004). It has long been a prime destination for tourism in the Mediterranean region. According to the World Tourism Organisation data, the Mediterranean countries constitute 20.4% of international tourist arrivals (WTO 2004). After regaining independence in 1991, the Croatian tourism industry was able to start re-establishing its position. Today Croatia is regarded as one of the countries with the highest growth rates in terms of international tourist arrivals (8.4% as compared with annual growth rate for Mediterranean of 3%) (HKG 2004).

In 2003 almost 9 million tourists visited Croatia (6.7% more than in the previous year, and 4.5% more as compared to 1990), with domestic tourists representing only 16.5% (MINT 2004). Notably the 1990 figures for domestic traffic include data for Bosnia & Herzegovina and Slovenia as well. The total number of recorded overnight stays equalled 46.6 million in 2003 (MINT 2004). The average tourist stay in Croatia in 2002 was five days (four days for domestic and six for foreign tourists) (HKG 2004). The foreign tourist market illustrates an

evident demand for shorter holidays, so-called “short-breaks”, rather than longer, seven or fourteen-day holiday arrangements. According to data from the Croatian National Bank, international tourism revenue in 2002 amounted to US\$ 3.9 billion, which is a 14% increase in comparison with the previous year (HGK 2004). Tourists in Croatia spend an average of US\$ 36 daily, 87% of which is spent on basic services (food, beverages and accommodation) and 13% on other services (Tomas 2001 as cited in HGK 2004). The revenue generated by international tourism in 2001 amounted to 17.1% of GDP, 34.6% of total exports of goods and services and 68.4% of total services exported. In 2002, revenue from international tourism accounted to 17% of Croatia’s GDP, while income per capita from tourism was US\$ 858.9 (HGK 2004).

Nautical tourism is one of the most attractive and prosperous forms of Croatian tourism (HGK 2004). In 2002, the number of tourists staying in marinas rose by 12% and the number of overnight stays increased by 6% compared to the previous year. As a result, nautical tourists account for 7.5% of the total number of tourists.

Approximately 90% of all tourist arrivals and 96% of overnight stays were concentrated in 7 coastal counties (MINT 2004). The largest numbers of tourist and overnight stays in 2003 were recorded at Istria (34.8% of all tourist overnight stays), Primorje – Gorski Kotar (22%), Split – Dalmatia (14.27%), Zadar (9.23%), Dubrovnik – Neretva (7.84%), Šibenik – Knin (6.1%) and Lika – Senj (2%). Continental Croatia and Zagreb accounted for the remaining 3.76%. Consequently, coastal regions are the areas with the most developed hotel infrastructure. According to data provided by the Ministry of Tourism in 2001, approximately 14 000 000 guestnights were recorded in 22 392 rooms of 132 (3, 4 and 5-star) hotels in 7 of the coastal counties (MINT 2002). In 2002, Croatia had a total of 752 601 beds, 12.8% of which were located in hotels, 25.6% in camps, 39.1% in private accommodation and 6.9% in marinas.

During the years 1993 to 2001, investment in tourism (hotels, motels and restaurants) accounted for 2.74% (US\$ 1.8 billion) of the total direct equity investment in Croatia (HGK

2004). In 2001 alone, tourism accounted for as much as 6.3% or US\$ 6.7 million of all direct investments. As a consequence, the quality of available accommodation has been constantly improving. Currently, the majority of hotel facilities (40%) are in the 3-star category, according to the present categorisation scheme, with only 8% belonging to a 5-star group (HGK 2004). The majority of accommodation establishments (41%) in Croatia belong to private owners (small stakeholders, managers and individual private owners), and are represented by small family-run hotels and B&Bs (HGK 2004). These lodging facilities ensure personalised services and are typically tailored to customer needs. In 2001, commercial banks owned 26% of accommodation units, privatisation funds (PIF) – 18%, and the Croatian Privatisation Fund (HFP) – 15%. The current portfolio of the Republic of Croatia includes 145 tourist companies, in 43 of which the state owns more than 50% of shares (HGK 2004). Hotels and restaurants employ 81 000 people, with the entire tourism sector directly employing 140 000 people and an additional 175 000 indirectly (HGK 2004).

Hotels with a distinctive character, so-called “boutique hotels” are currently very popular. Hotels also compete by specializing in sports, wellness, fitness, and conferences or as hotels for gourmets, singles, nature-lovers etc. The daily spending in hotels is US\$ 49.9 (Tomas 2001 as cited in HGK 2004).

Currently, effort is being devoted to the refurbishment and modernisation of hotel facilities in response to the growing interest of tourists, thereby giving way to the possibility of incorporating environmentally sound technologies and practices into the hotel market.

Discussion of Results

The livelihood of tourism, as well as the hotel industry, depends to a considerable extent on the availability of a clean natural environment. Traditionally, and to some degree understandably – from a business perspective and in fear of negative publicity – the hotel industry has been reluctant to assume responsibility for any significant negative environmental impacts occurring during various stages (including construction, operation,

maintenance, retrofitting, demolition) in the life-cycle of hotel facilities. Recently, however, attitudes have started to change. This was acknowledged by the majority of respondents, 81.5% in Poland, 82.7% in Sweden and 100% in Croatia, who believed environmental protection to be essential for the performance and further development of the tourism industry. Recognizing the problem is a necessary first step towards change and the implementation of more responsible practices and behaviour.

The majority of respondents, 69.3% in Poland, 83.3% in Croatia, and 87.6% in Sweden, believed that environmental impacts caused by hotels are moderate to significant (Figure 3), which supports the findings of previous scientific investigations (APAT 2002; Balaras 2003). By contrast, in a similar study performed in Guernsey, the Channel Islands, only 38%, respectively 36%, of the respondents believed that hospitality, or the tourism sector had a moderate to significant impact on the environment (Stabler & Goodall 1997).

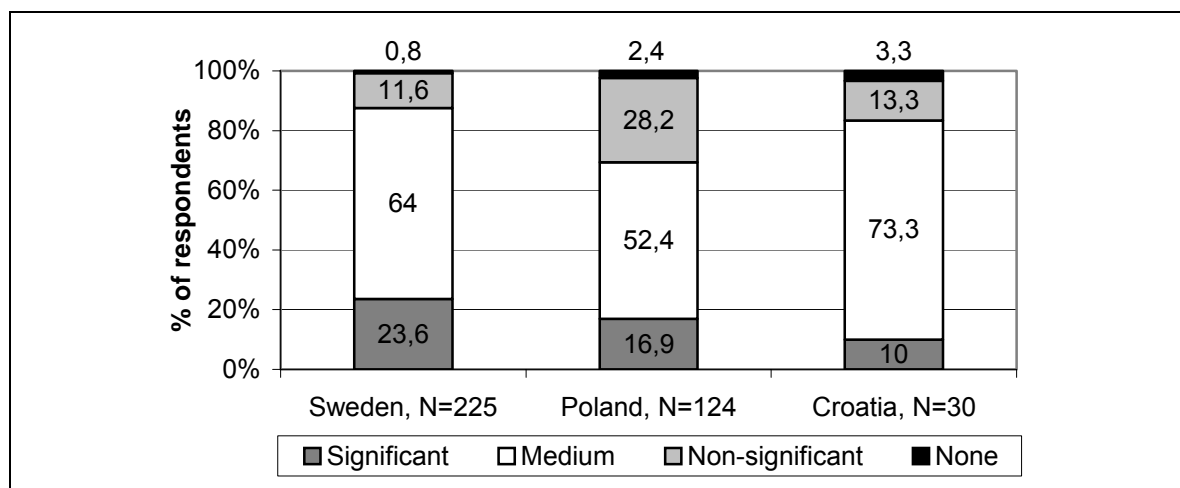


Figure 3. Magnitude of perceived hotel environmental impacts, % of respondents.

Due to its size and global presence, the hotel industry has a substantial potential for the promotion and support of corporate responsibility. It is therefore encouraging that a predominant majority of hoteliers in this study expressed a serious concern for the environment. The extent of positive answers ranged from 82.3% in the Polish sample, to 94.7% for Swedish and 100% for Croatian respondents.

Employee awareness of on-going (in-house or corporate-level) activities promoting greater environmental responsibility and a general concern for environmental issues was highest in Sweden (66.2% positive answers, including 60.4% actually listing concrete pro-ecological activities), Croatian hotel representatives ranked second (63.3% and 60%, respectively), followed by Poland (56.5% and 43.5%). At the same time, many respondents were concerned about the cost of becoming more environmentally responsible.

Despite existing limitations, a majority of hoteliers declared to be involved in some type of environment-oriented activity (50% in Croatia, 84.7% in Poland, and 93.3% in Sweden). Up to 75% of the environmental impacts caused by the lodging industry are estimated to originate from an excessive consumption of non-durable goods (and consequent waste generation), as well as use of energy and water (APAT 2002). These areas are those most frequently targeted by environmental measures. In total, more than 77% of the respondents from Poland and Sweden, and only 26% from Croatia declared being involved with energy and water saving measures, and some form of waste management (sorting, recycling). Swedish hoteliers generally displayed the highest interest in environmental activities, while in Croatia pro-ecological initiatives were not found to be very common (Figure 4).

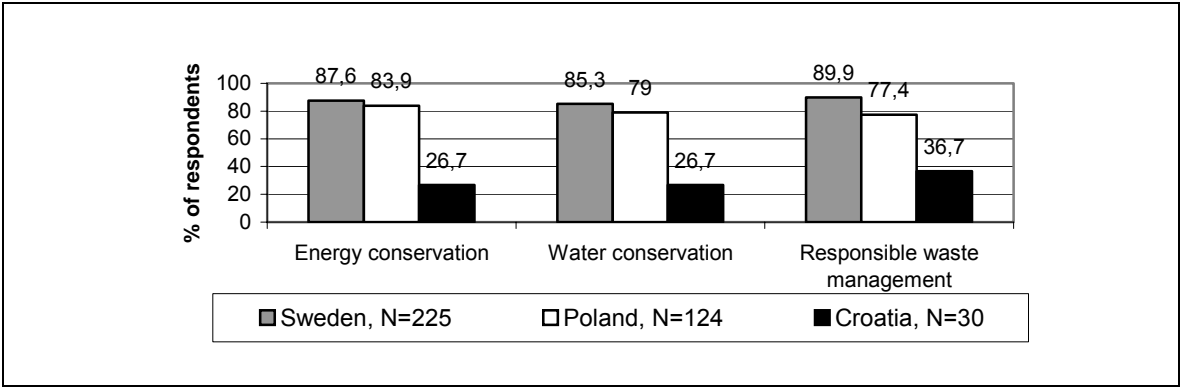


Figure 4. Environmental areas targeted, % of respondents.

Among energy saving options, energy-efficient lighting received the most attention (76% in Sweden, 70.2% in Poland but only 23.3% in Croatia). A high popularity of energy-efficient lighting among the respondents may be attributed to promotion campaigns that have been implemented in many of the regions, as well as the fact that even small savings actually

elucidate reasonable economic benefits. Many people insist that efficient equipment is prohibitively expensive, however they are often unaware of the fact that the running costs of inefficient apparatus are frequently much higher than the initial cost of more efficient equipment. It is therefore important to evaluate the cost of equipment not only based on initial cost, but taking the entire life-cycle into consideration. This attitude will gradually become more common in the future and current figures related to the incorporation of energy-efficient equipment into the hotel market (20% for Croatia, 41.9% for Poland, and 58.2% for Sweden) will undoubtedly increase. Leaflets encouraging hotel guests to save energy are frequently displayed in the rooms of Swedish hotels (40.4%), followed by Polish hotels (22.6%), and only marginally in the Croatian facilities (6.6%). The relatively low popularity of various leaflets may be explained by the role that hotels have in society. They are a segment of the service industry and designed to provide multi-faceted comfort and services to guests who are frequently accustomed to, and willing to pay for exclusive amenities, treatment and entertainment. The placement of any "Please save" information in the room, may therefore be perceived by the guests as an intrusion on their privacy and comfort. On the other hand, these leaflets do not oblige anyone to follow their content, their aim is merely to suggest the possibility of co-operation.

Among water saving measures, the towel and linen reuse program is a well-established practice in most European countries, with 71.6% respondents from Sweden, 64.5% from Poland and 23.3% from Croatia indicating this area of activity. This initiative saves not only water and electricity, but also reduces the use of detergents and prolongs the life-expectancy of materials. The installation of water-efficient fixtures may have a significant influence on the total quantity of water used. Water saving fixtures are most common in Sweden, with more than 60% of the hotels in the investigated sample declaring their use. The figure for Poland is 44.4% and for Croatia – 23.3%. A comment frequently expressed was the fact that these types of fixtures were generally installed during the refurbishment of the rooms. Leaflets

encouraging customers to save water are less popular, but nevertheless employed by every tenth hotel in Croatia and every fourth facility in Sweden.

The consumption of non-durable goods and consequent generation of waste is a predominant issue influencing a hotel's impact on the environment. The quantity of waste produced at an average hotel is generally measured in tonnes per month, resulting in significant transportation and land-filling costs. The avoidance of waste generation is a beneficial solution both environmentally and economically. Waste sorting, mainly in offices and kitchens, uncommon in guestrooms, is by far the most widely used practice in Sweden, where four out of five of the hotels included in the survey have an active waste sorting and recycling program. In the Scandinavian countries, significant attention is generally given to waste sorting and recycling, explaining the high performance rate of this activity in Swedish hotels. The relatively low popularity of waste sorting in Poland and Croatia (30.6% and 30%, respectively) may be attributed to the lack of sorting facilities in a number of regions in these countries. Furthermore, as indicated by one of the respondents, there is often only one vehicle collecting waste in the area, dumping sorted and unsorted debris into a common container, and thus discouraging locals to continue separating waste. Such barriers could however be relatively easily overcome by initiating cooperation among hotels located in the same area, as has been shown by the Budapest Hotels Collective Waste Management Program (UNEP & IH&RA 1997). Much of the furniture, equipment, textiles and other items found in hotels is still in fairly good condition when exchanged, therefore donation/sale to local charities is a customary practice (60% respondents in Sweden, 50.8% in Poland, and 16.6% in Croatia). This initiative corresponds well with the idea of sustainability, since prolonging the active life-expectancy of various items lowers their environmental costs (from the life cycle point of view). The issue of food donation is extremely controversial and often prohibited by local sanitary laws, explaining its low popularity (32.3%, 17.4% and 0% in Poland, Sweden and Croatia, respectively). Approximately 50% of the respondents from Poland and Sweden and 0% from Croatia

supported the purchase and utilisation of bulk or/and reusable food and detergent packaging instead of throw-away alternatives.

Hoteliers participating in the survey were further asked to estimate by effectiveness the incentives, which could induce them to undertake environmentally-oriented initiatives, based on a 7-point Likert scale (Figure 5). This figure illustrates that the results varied somewhat between countries.

The possibility of reducing operational costs was by far the strongest incentive for Polish hoteliers. This was slightly less true in the Swedish and Croatian cases (operational cost savings ranked an average of 5.8 in Poland, as compared to 5.1 in Croatia and 5.04 in Sweden). This corresponds well with the findings of the Guernsey study (Stabler & Goodall 1997), where the prospect of reduced costs was equally found to be the most important. Croatian hoteliers ranked the potential of improving hotel image as most important. Customer expectations ranked second in the Polish and Swedish samples. Croatian hotels, ranked the goal of decreased environmental impacts as third, and customer expectations as fourth. Swedish hoteliers also placed decreased environmental impacts as a third priority followed by improved hotel image, while for Polish hoteliers hotel image ranked third before additional marketing assets.

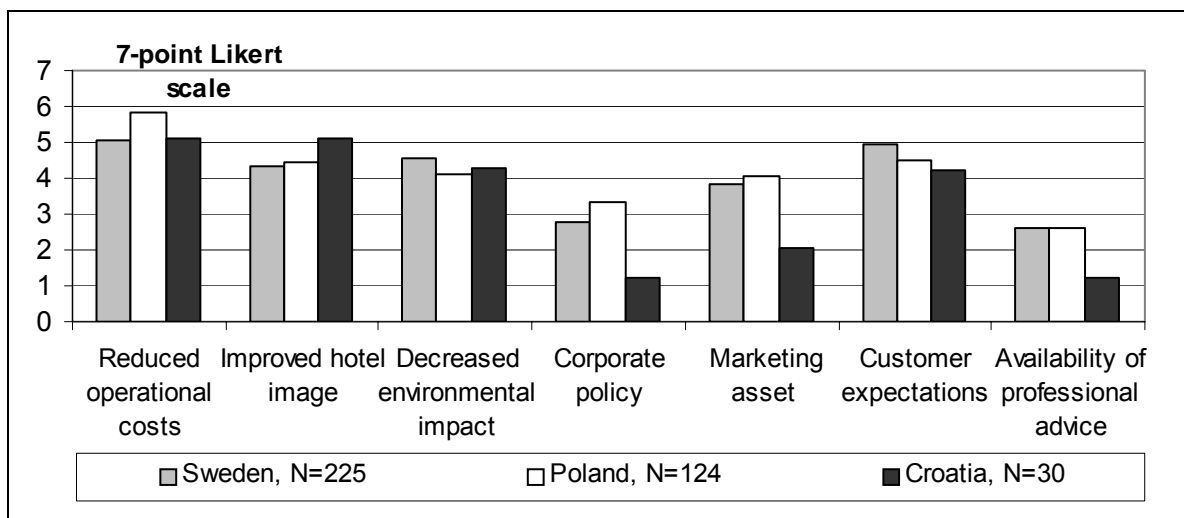


Figure 5. Estimating, by effectiveness, incentives supporting pro-ecological behaviour/practices (averaged values estimated with a 7-point Likert scale).

Due to a low customer demand, hoteliers are currently giving eco-friendliness little priority in their marketing efforts (Figure 6). Low customer demand obviously decreases the marketing value of corporate environmental responsibility. However, low demand does not necessarily indicate a low environmental consciousness among travellers, rather a lack of awareness of the ways and the extent to which hotel facilities may affect the environment negatively. Due to a current lack of data, more research is needed to investigate customer consciousness, expectations and behaviour. Also, unless specifically trained, the average traveller cannot be expected to be aware of, or to know how to use the complex environmental metrics needed for evaluating environmental performance of hotel facilities. The scarceness of environmentally responsible role-model facilities makes it additionally difficult for travellers to distinguish “good” from “bad” facilities.

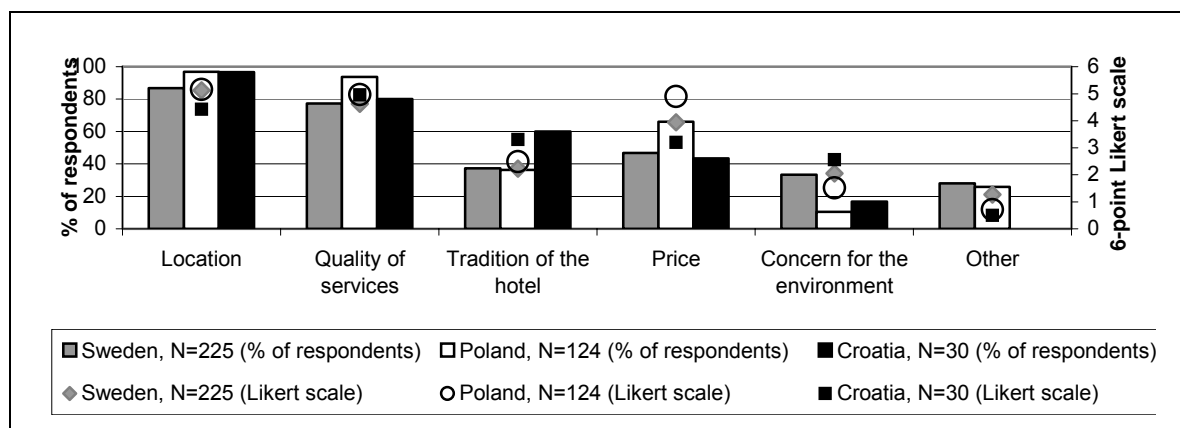


Figure 6. Weighing of hotel features affecting customer choice (according to hoteliers), % of respondents and 6-point Likert scale.

The percentage answers in Figure 6 indicate the number of hotels actually listing given features in their marketing materials, while the Likert scale refers to the importance of certain features in affecting customer choices. A 6-point Likert scale was used in the collection of this set of data, as the questionnaires offered six ranking options in this case.

Conclusions

Swedish hoteliers were generally found to have a higher environmental awareness, comprehensive knowledge relevant to environmental protection, and well-established pro-ecological programs and initiatives. Polish hoteliers are at the stage of recognizing the importance of the environment and initiating various activities. However, since the national level of environmental education/knowledge is relatively low, most actions undertaken by Polish hoteliers are aimed at achieving immediate economic benefits, or those required by law. It is reasonable to conclude that Polish incentives are primarily economically motivated, while any environmental benefits achieved are seen as an extra bonus. Croatian hoteliers generally seem to have a high level of environmental knowledge and concern for environmental issues. However, among the three countries investigated, concrete pro-ecological initiatives were found to be least likely implemented in Croatia. This may in part be due to the very recent revival of the Croatian tourism industry, following regional political and economic difficulties in the 1990s. It is reasonable to expect the situation in Croatia to improve as the industry continues to regain momentum.

This study has indicated that the prospect of significant cost savings as well as customer demand, are currently the most likely parameters to enhance environmental responsibility among hoteliers. Undoubtedly a great need remains for increasing environmental knowledge and awareness among hoteliers and the general public. To better understand and develop the marketing potential of environmental responsibility, the mechanisms of customer demand and choice will need to be investigated in more detail in the future.

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