



Green Host - Sustainability and eco-friendly habits in the lodging sector it's time to start the game

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Summary of the Report: Analysis of Customer Expectations in the Sustainable Hospitality Sector

Context

The tourism sector significantly contributes to environmental degradation, while also depending heavily on healthy ecosystems. The hospitality industry is increasingly adopting sustainable practices for economic, reputational, and social reasons. However, consumer skepticism toward greenwashing false or exaggerated environmental claims is a growing challenge.

Objective

This study aimed to understand the relationship between sustainable practices and customer satisfaction, loyalty, and willingness to pay more. The analysis was based on a sample of 104 respondents from Austria, Bulgaria, Germany, Italy, and Poland.



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Methodology

The research was conducted through an online survey with the following sections:

- Customer profile
- Evaluation of hotel environmental practices
- Hotel environmental communication
- Customer environmental concern
- Satisfaction, loyalty, and willingness to pay more

Eleven hypotheses were tested regarding the connections between environmental concern, hotel practices, communication, satisfaction, and loyalty.

Results by Country

Austria

High environmental awareness but critical of actual implementation.
Poor performance in waste separation and use of certified products.
Moderate willingness to pay more for sustainable accommodations.

Bulgaria

Strong alignment between environmental values and behavior.
High importance placed on transparent communication.
Willing to pay more, though still price-sensitive.

Germany

High level of education and environmental consciousness.
Generally satisfied, though some improvement areas remain.
Clear willingness to financially support green initiatives.

Italy

Theoretical support for sustainability, but lower willingness to pay more.
Weak environmental communication.
Strong link between good practices and loyalty, but a noticeable "value-action gap."

Poland

Very positive evaluations of hotel sustainability efforts.
Sustainability is highly valued, but practical factors like price and location still matter. High loyalty and willingness to pay more.



Main Conclusions

Environmental communication plays a key role: customers only value green practices if they are visible and well communicated.

Customer satisfaction is the main driver of loyalty and mediates the effect of sustainability practices.

It is not enough to implement green measures — service quality and communication are equally crucial.

There is clear market potential for sustainable hotels, but success depends on credibility and balance with other guest priorities (e.g., price, comfort).



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