Changes in marketing strategies at Spanish hotel chains under the framework of sustainability

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Abstract:

Purpose: This study analyses, based on qualitative research, the changes in marketing strategies and activities at the main Spanish hotel chains in terms of turnover, following their commitment to sustainability.
Methods: To that end, 8 in-depth interviews were conducted with professionals in management positions at the hotel chains with the highest turnover. Data analysis was conducted using IRaMuTeQ software by performing a Descending Hierarchical Classification (DHC).
Results: The results enable us to conclude that product policy, price, distribution and communication are significant classes in text analysis and the price variable predominates over the rest. The analysis also shows positioning is highly important.
Implications: This research allows to establish the details of the main marketing changes that have taken place at the main organisations in the Spanish tourism sector. It also helps other organisations to define their action framework in the current context of sustainability.

Keywords: *tourism, marketing strategy, marketing mix, sustainability, hotels, SDG*

JEL Classification: *M00, L1, M31*

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1 INTRODUCTION

There is no question that organizations nowadays have to attend to different stakeholders and help achieve a balance between economic, social, and environmental needs. This trend, which has been maturing in our societies for years, was accelerated by the COVID-19 pandemic, which jeopardized the whole system. The business strategies of both public and private companies must consider not just financial returns but positive returns on key aspects for society and the planet.In 2015, the United Nations, through its 2030 Agenda, proposed

a global formula to achieve this: "We call upon all businesses to apply their creativity and innovation to solving sustainable development challenges" (United Nations General Assembly, 2015, p. 25). Given the complexity of implementing the 2030 sustainable development agenda, the commitment of the whole of society is required, including governments and the private sector, from micro-enterprises to cooperatives and large multinationals (Jones et al., 2018). According to a study by the Business and Sustainable Development Commission, the economic rewards of providing SDG solutions could be at least $12 trillion per year in market opportunities and could generate up to 380 million new jobs by 2030. Businesses play an important role in achieving these goals (Van der Waal & Thijssens, 2020), and the importance and relevance of organizations are determined by their raison d'être in society. Thus, the private sector largely defines the levels of social and environmental performance across the entire value chain in which it operates, from production to the supply and marketing of consumer goods (Pedersen, 2018).

Within private enterprise, different initiatives and certifications have been launched concerning sustainability and the balance between financial returns and the environment. Amongst these initiatives, this paper focuses on the hotel sector in Spain, as the hotel industry is increasingly seen as a source of economic, environmental, social, and cultural benefits thanks to its contribution to the promotion of employment, the improvement of infrastructure, and respect for different cultures (Séraphin et al., 2017). However, the research conducted on the hospitality industry is still very limited, despite the sector being considered essential for the advancement of sustainability (Nosratabadi et al., 2019) and its impact on achieving the SDGs of the 2030 Agenda (Serrano-Baena, 2022).

The authors also consider the significant contribution of tourism to Spain's GDP, which poses a challenge for the country in terms of reducing its environmental impact.

The Responsible Research Business and Management Network (RRBM, 2019), composed of leading business and marketing specialists, specifically asks marketing experts to commit to the SDGs. In addition, marketing specialists have a long history of engagement with sustainability (Lund, 2018; Tollin & Christensen, 2019). Marketing capabilities associated with the innovation of new products, services, and business models constitute a strong driver for leveraging commitment to sustainability (Tollin & Bech Christensen, 2019).

The effect of the pandemic on the tourism sector and specifically on hospitality cannot be ignored; as reported in numerous studies, it has been devastating. It constitutes a watershed, as in just a few months global tourism went from "mass tourism" to "no-tourism" (Dodds & Butler, 2019; Seraphin et al., 2018). In this sense, many authors argue that the pandemic should prompt reflection on the sector's contribution to climate change (Gossling et al., 2020). Additionally, this crisis presents a distinctive chance to reshape the sector, emphasizing growth alongside inclusivity, sustainability, and responsibility. In addition, to build for the future, special attention should be placed on building resilience and promoting sustainability at all levels (UNWTO, 2020b, p. 33). Thus, it appears that the best way for the industry to reach the SDGs is through the engagement of all stakeholders (Byrd, 2007; Waligo et al., 2013). In the words of Firoiu et al. (2019), future research should go deeper by collecting data from companies operating in different countries and analyzing whether they have integrated the SDGs in every country where they operate. Our research has been carried out among the hotels with the highest turnover in Spain. The Spanish context is particularly interesting, as public authorities have launched several initiatives to improve the environmental performance of tourism, one of its most relevant sectors (Ayuso, 2006). In the same author's words, as the accommodation products offered by hotel companies are strongly connected to the tourist destination and the quality of the natural, social and cultural environment, it would be interesting to link the discussion on company-specific tools with sustainable tourism strategies at the regional level. Within the specific tools available to the company, we highlight the role of marketing. For this purpose, this study has focused on the marketing strategies that have been developed by the main hotel companies to advance in their commitment to sustainability. Furthermore, Chan (2013) notes that there have been few studies on green marketing in the hotel industry. In addition, as emphasized by Kim et al. (2019), future research is void of key areas that could add value to the discussion of sustainability in the hospitality industry.

The aim of this research project is to explore how large hotel companies have changed the way in which they act following the adoption of the Sustainable Development Goals. We seek to explore the impact of increased awareness of the importance of rebalancing economic, social, and environmental benefits on the marketing strategies and actions of the largest hotel chains. These ideas can inspire other hotel groups and even organizations in other business sectors. To that end, we conducted eight in-depth interviews with members of the management teams at the hotel chains with the highest turnover in Spain

2   LITERATURE REVIEW

2.1. Sustainability and the tourism sector

In recent years, the concept of sustainability has had a strong social, economic, and political impact all over the world. Indeed, sustainability is seen as a fundamental aspect of business development, and there has been a growing interest in both theoretical and empirical research (Mathew & Sreejesh, 2017). In this context, the researchers administered a questionnaire-based survey to gather data from 432 residents across three distinct tourism destinations in India. Their objective was to assess how responsible tourism influences the perceived quality of life within these communities and to explore the mediating effect of perceived destination sustainability. Recognizing the necessity for policy reform, governments have opted to strategically prioritize actions that promote sustainability. Among all the actors involved in attaining the SDGs, this exploratory study focuses solely on the role of business, which can significantly promote (or discourage) sustainable development when making decisions on resource use and management, investment, infrastructure, innovation, value creation, personnel management, education, communication with consumers and society, investor relations, etc. (Agarwal et

al., 2017; Firoiu et al., 2019; Fonseca & Carvalho, 2019; López, 2020; Scheyvens et al., 2016). For example, Fonseca and Carvalho (2019) examined the extent of involvement among 235 Portuguese organizations with Quality, Environmental, Occupational Health, and Safety (QEOHS)-certified management systems in supporting and reporting progress towards the United Nations' 17 Sustainable Development Goals (SDGs) outlined in the 2030 Agenda. Thus, organizations are invited to play a positive role and align development with sustainability (Kolk & Van Tulder, 2010). The United Nations 2030 Agenda provides a holistic, multi-sector vision of sustainability through the Sustainable Development Goals (Bandari et al., 2021), encouraging companies in any sector to become agents of change.

Out of all the sectors and company typologies, this paper focuses on tourism and specifically on the hotel sector, mainly for the following two reasons: Firstly, due to its impact on global GDP, The tourism sector accounts for more than 10% of global GDP and 8% in Spain, and according to the latest data published by the INE (Spanish National Statistics Institute), tourism was worth €97.126 billion in 2021. And secondly, due to its role in terms of sustainability, which is currently highly questioned. Despite its aforementioned contribution to GDP, the sector does not yet have a sustainable, open source management approach that would enable and help it to "lead by example" to contribute to the Sustainable Development Goals (Rubio-Mozos et al., 2020).

Sustainability is a very important topic in tourism planning and development (Weaver, 2006; Hall et al., 2015). The World Tourism Organization (UNWTO), as a specialized agency of the United Nations, holds a prominent position globally within the tourism sector. Its primary mission revolves around advocating for responsible, sustainable, and inclusive tourism, aiming to ensure universal access. Its overarching objective is to contribute to the achievement of the 2030 Agenda for Sustainable Development and the Sustainable Development Goals (SDGs). Evidence of political commitment to sustainability can be seen in the approval of the Tourism Sector Conference held in 2022 under the Programme of Sustainable Tourism Plans at Destinations. In addition, the Secretary of State for Tourism will allocate €23 million to this edition to move towards directing tourist destinations towards a model based on environmental, socio-economic, and territorial sustainability (Ministry of Industry, Government of Spain).

The term "tourism sector" encompasses companies in the hotel, catering, and transport sectors, along with any other activities directly associated with tourism. Of all the areas and sub-sectors that make up the sector, this paper focuses on hotel companies, as they have been recognized as the most harmful to the environment due to their intensive use of resources (Rahman et al. 2012). Indeed, hotels generate a significant amount of waste and consume a great deal of energy and water. Hotels are partly responsible for water and air pollution, environmental degradation, increased use of water and energy resources, the generation of local employment, and the use of local materials to provide products and services to their guests (Dodds & Butler, 2010). Given the impact generated by the industry, there is some pressure on hotel entrepreneurs to properly manage the economic, cultural, and social impacts to achieve

sustainability (Masadeh et al., 2017). Through a quantitative analysis, the primary outcomes of their research demonstrated a notable positive influence of hotel development on the advancement of sustainable tourism. The hotel industry certainly plays a fundamental role in the sustainable development of tourism (Serrano-Baena, 2021). If it can properly manage resources while advancing in its commitment to sustainability, it can make a positive contribution to the social and economic development of the area in which it operates (Golja & Nizic, 2010). It is important to point out that those authors have focused on the importance of environmental awareness among the managers of the highest category hotels in the Republic of Croatia. Our study also examined management's perspective.

When considering the sector's progress in terms of sustainability, it must be borne in mind that one of the characteristics of hotel chains is the global scope of their activities. In this sense, governments should establish policies to implement the 17 goals of the 2030 Agenda, which focus on both developed and developing countries to improve the quality of life of the host community and have a positive impact on the tourism industry (Transforming Our World: The 2030 Agenda for Sustainable Development, 2015). However, despite all of the literature that highlights the significance and impact of the tourism sector and, in particular, the role of hotels in sustainability, relatively little research has been conducted on the role of responsible hotel practices in attaining the Sustainable Development Goals, especially in developing countries (Abdou et al., 2020). In their quantitative study involving a sample of 48 participants from 4 to 5 Green Stars hotels in Egypt, they unveiled that hotel operators ought to effectively integrate green hotel practices into their operational strategies to attain the environment-related SDGs. This is the case despite the fact that sustainability is increasingly understood as a key competitive advantage in the tourism industry (Rodríguez-Daz & Pulido-Fernández, 2020) that brings significant benefits to tourism destinations (Calvante et al., 2021).

2.2. Marketing and the tourism sector

Marketing plays a very important role in the different fields in which hotels operate. It enables a company to create relationships with its consumers. The ultimate aim of marketing is to make those relationships as profitable as possible for both parties (Kotler & Armstrong, 2020). Many current production, consumption, and purchasing models are unsustainable and detrimental to achieving social, environmental, and economic balance (Burroughs, 2010; Kautish et al.,. 2020), but marketing strategies can be designed to raise consumer awareness of sustainability and help meet the SDGs (Amoako, 2020; Campo et al., 2020; Palakshappa & Dodds, 2020; Singh & Pathak, 2020). In fact, the perception of sustainability has also been associated with satisfaction, the perception of value, brand loyalty, the word-of-mouth effect, and market segmentation (Cavalcante et al., 2021), all related to key marketing strategies and activities.

A company can therefore influence how consumers consume and purchase, whether via more sustainable products or proposals, services with a lower environmental impact, or through the use of more efficient and cleaner distribution channels, etc. Numerous studies have related perceived sustainability to marketing variables such as value creation,

image, product or service performance, and behavioral and perceptual consumer issues (Iniesta-Bonillo et al., 2016). Current marketing philosophy encourages organizations and marketing managers to recognize consumers as the power and key to obtaining sustainable, competitive, and profitable business outcomes (Kuada, 2016; Dzogbenuku & Keelson, 2019), while taking into account stakeholder impact (Mitchell et al., 2010; Palakshappa & Dodds, 2020). Likewise, a company can employ marketing to communicate the value of its activities or even educate the consumer using tools such as advertising, social networks, or public relations. We therefore believe that marketing is a key area in which to implement important changes that contribute to the fulfillment of the SDGs and their integration with an organization's overall strategy.

Marketing is one of the traditional functional areas of the company, and its ultimate goal is to build and manage profitable relationships with customers (Kotler & Armstrong, 2020). In order to manage those relationships, marketing areas need to articulate a series of strategies that, although defined at the departmental level, must be aligned with the organization's overall strategic plan. Like any other area, to achieve its objectives, it needs to define a series of strategies and actions. There is a natural, necessary association between marketing strategies and the marketing mix. According to Walker et al. (1992), marketing strategies consist of defining the market segment or segments to be reached and the range of products to be offered. In addition, firms seek synergies and competitive advantage by designing an integrated marketing plan (the 4 Ps) tailored to customer needs and desires in the target segments (Zinkhan & Pereira, 1994). Slater & Olson (2001) agree on this association and integration between marketing strategies and marketing activities, explaining that marketing strategy encompasses decisions concerning market segmentation, targeting, and the design of positioning strategies. Ansary (2006) points out that marketing strategy can be defined as the total sum of the integration of segmentation, targeting, differentiation, and positioning strategies designed to create, communicate, and deliver an offer to a target market. Thus, the first step is to divide the market, assess the different consumer segments, and decide which of them to target. The second is to decide the company's positioning in consumers' minds and, finally, to choose the attributes that make you different from the competition. Marketing managers must adapt their marketing mix elements, including products, prices, channels, and promotional tactics, to suit the requirements of individual consumers (Camilleri, 2018).

Marketing must be able to manage many decisions that happen in the day-to-day life of organizations, which involve different areas of the organization and help in achieving the organization's mission. In this sense, Varadarajan (2010) states that marketing strategy refers to an organization's integrated pattern of decisions that specify its crucial choices concerning products, markets, marketing activities, and marketing resources in the creation, communication, and/or delivery of products that offer value to customers in exchanges with the organization and thereby enable the organization to achieve specific objectives.

Although the integration between marketing strategies and activities is closely intertwined, it must not be forgotten that the marketing mix serves to put the defined strategies into practice. Putting them into effect today means considering the most sustainable options available on the market. In fact, an increasing number of companies claim to be publicly committed to a global definition of sustainable development that encompasses a mix of sustainable products and services (Jones et al., 2008). In this regard, as argued by Jones et al. (2008, it is important to recognize that there is a growing interest in "sustainable marketing," defined by Charter et al. (2006) as the creation, design, and development of sustainable solutions with a high net sustainable value while satisfying customers and other stakeholders. The marketing mix (the traditional 4 Ps: product, price, place, and promotion) defined by McCarthy (1960) is still valid, as stated in the American Marketing Association (2013), but in this new context of organizational commitment to sustainability, it must be married to the specific aims of sustainability: participants (or people), processes, and physical evidence (Pomering, 2017). This is also emphasized by Sheth & Parvatiyar (1995), who propose, for example, that marketing mix decisions need to be redefined towards sustainability. According to Diez-Martin et al. (2019, great progress has been made in the fields of marketing and sustainability. This progress is evidenced by more than 2000 publications between 1990 and 2018, with more than 30,500 citations in total from the Web of Science Core Collection. Specifically, these papers were included in the Social Science Citation Index (SSCI) and the Emerging Sources Citation Index (ESCI). Diez-Martin et al. (2019) list the topics addressed in the literature: consumers and sustainability, advertising linked to environmental issues, ecological and social marketing, responsible marketing, green marketing, sustainable marketing, and sustainable value chains.

2.3. Sustainability, consumer perceptions and hotel marketing

The marketing area is responsible for managing the relationship with the hotel's clients. To build and profitably manage this relationship, marketing may act in at least the following three directions:

1. It gathers their sensitivities and responds to them. Advances in information technology and the introduction of new methods of communication have led to increasingly significant changes in consumer behavior. These changes have produced a shift in focus in companies' marketing strategies and business administration, especially in the hotel industry (Cantallops & Salvi, 2014). Additionally, the industry is highly customer-oriented and resource-consumptive, and it is sensitive to many predictable and unpredictable market and environmental changes (Lu & Nepal, 2009). Thus, the marketing area can be used to capture such changes and provide a better response.

2. It educates the user to be more sensitive to sustainable development. As the importance of sustainability for hospitality consumers increased, academic attention has shifted towards the relationship between sustainability practices and consumer satisfaction, as evidenced by a burgeoning number of studies examining the contributory role of sustainability actions on consumer satisfaction (Punitha et al., 2016). Furthermore, Gao & Mattila (2014) found that consumer satisfaction increased when companies engaged in environmentally

friendly practices.

3. It communicates and explains the hotel's commitment to sustainability. According to Dief & Font (2010), the reviewed literature suggests that a few successful marketing managers, mainly from leading hotel chains in Western Europe and North America, have come to realize the value of green marketing as a tool to position their companies in the market, to differentiate their companies' products and services from those of competitors, and to create trustful relationships with their environmental stakeholders—non-governmental organizations, market intermediaries (e.g., tour operators), the public, and most importantly, their guests (Kasim, 2008). In fact, the authors Ham & Choi (2012) suggested that green practices can potentially appeal to customers' attention and increase marketing sales.

As Dief & Font (2010) said, there is a lack of literature about the implementation of environmental strategies, and few studies have addressed the impact of environmental issues on the marketing strategies of businesses. In order to address this gap, we have conducted an exploratory study to analyze the changes in marketing strategies and activities at the main Spanish hotel chains in terms of turnover, following their firm commitment to sustainability.

3   METHODOLOGY

3.1 Research method: In-depth interviews
In order to achieve the research objective, the authors decided to carry out qualitative research. Among all the available tools for information gathering, in-depth interviews were selected as they were considered to be an ideal data collection technique to create a connection between the researcher and the interviewee. Moreover, they are useful to explore participants' experiences and collect ideas, knowledge, and impressions of the interviewees (Kaliber, 2018; Tong et al., 2007). As Malhotra (2020) pointed out, they are an unstructured, flexible, and direct way of obtaining information and are conducted on an individual basis. The open-ended interview aims to understand informants' perspectives on their lives, experiences, or situations as expressed in their own words (Mariampolski, 2001).

3.2 Context
This study analyses the marketing strategies and actions of the largest hotel chains in Spain following their firm commitment to sustainability. We obtained results for 8 of the 10 hotel chains with the highest turnover. The enactment of the SDGs can be seen as a turning point in global commitment to sustainability since, among many other things, the 2030 Agenda helps to organise, identify, unify and, above all, establish specific lines of action. However, the reality is that many companies, for various reasons, had already committed to sustainability. From a social and economic science perspective, sustainability has evolved into the concept of sustainable development. Sustainable development is defined as the ability to meet current needs without compromising the progressive ability of future generations to meet theirs. (Garrigos-Simon et al., 2018) (Dixon & Fallon, 1989).

3.3 Sample and participants
The sample employed constitutes a very relevant population as far as the hotel sector is concerned. The top 10 national hotel chains were selected by turnover according to the Hosteltur ranking (the main specialised media in the professional tourism sector). This ranking has become a benchmark for the sector. As stated on the Hosteltur website, the main characteristics of the ranking are as follows: (a) "Large hotel chain" is considered to mean a company that manages more than 1,000 rooms; (b) the hotels run by each chain are counted, indicating whether they are owned, rented, managed or franchised, but under no circumstances including establishments associated in marketing networks that conduct marketing and promotion work for them but are under individual, independent management.

The pandemic has had a devastating impact on the hotel sector. In fact, some of the demographic data reveal that at some points during the pandemic more than 90% of the world's population lived in countries with some form of international travel restrictions, and many of those countries also had some form of domestic travel restrictions, such as limited air travel or a ban on travelling abroad (Gössling et al., 2020). The authors therefore consider it more appropriate to use a sample based on pre-pandemic data (2019). Table 1 lists the 10 hotel groups with the highest turnover in Spain and gives some descriptive variables of these groups.

Table 1. Characteristics of the main hotel groups in Spain by turnover.

Hotel chains and brands under which they operate	Year founded	Public or private capital	Workforce	Domestic and/or international scope	Commitment to sustainability.	Turnover 2019 (million Euros)
Meliá: Meliá, Gran Meliá, ME, Paradisus, Melia, Innside, Tryp, SOL, Círcle.	1956	54% Family 46% Free float	>30,000	380 hotels in more than 40 countries on 4 continents	Linking the CSR model to the 2030 agenda	2,846
Iberostar	1960	100% Family	>26,000	100 hotels in 17 countries	Own Agenda 2030	2,353
Riu: Riu, Plaza, Palace, Adults Only, All inclusive	1977	51% Family 49% TUI Group	>24,000	100 hotels in 20 countries	Assessment of its contribution to the 2030 Agenda, with respect to the GRI indicators (empowering sustainable decisions).	2,240
Barceló: Royal Hideaway, Occidental, Allegro, Barceló.	1931	100% Family	>34,000	150 hotels in 22 countries	Own Code of Ethics (2013)	2,218
NH: BH, Nh Collection, Nhow, Tivoli, Anantara, Avani, Elewana, Oaks.	1978	94% Minor Capital 6% Free Float	>12,000	361 hotels in 29 countries	Holistic perspective framed under the premise of corporate governance.	1,718
Bahía Príncipe: Bahía Príncipe, Grupo Piñero, Soltour, Coming2, Tropic one, Scuba, Turiscar.	1977	100% Family	>8,000	27 hotels in 6 countries	Integration of SDGs as a roadmap for activity management.	800
Palladium: Palladium, TRS, Grand Palladium, Palladium Boutiques, Fiesta, Ushuaia, Bless, Only You, Ayre, Hard Rock.	1969	100% Family	>13,000	50 hotels in 6 countries	Sustainability policy within the framework of Corporate Social Responsibility	752
H10: H10, Ocean, The One.	1981	60% Family	>1,500	55 hotels in 18 countries	Own code of ethics and sustainability project (2017)	660
Hotusa Group: Eurostars, Aurea, Exe, Ikonik, Crisol, Tandem.	1982	100% Family	>5,000	214 hotels in 16 countries	Specific unit with general management involved	620
Princess Hotels.	1967	100% Family	>5,000	22 hotels in 3 countries	Cross-cutting Corporate Social Responsibility Programme	286.80

*Data provided by the hotel chains.

The researchers contacted the top ten hotel chains to identify the right person at each organisation to approach directly. In some cases the hotels have their own sustainability department, but in many others there is no such department, so it was necessary to conduct an internal analysis of the suitability of the participant's profile. Finally, in all cases, the

interviewees were personnel in senior management positions at each of the hotels (either general management or marketing, communication and/or sustainability management). The final sample is composed of 8 hotel groups, as two companies decided not to participate in the study (Bahía Príncipe and Riu).

3.4 Interview structure

In order to conduct the in-depth interviews, a semi-structured interview script was used based on a systematic review of the concept of marketing and sustainability (Marco-Gardoqui et al., 2022). A review of the relevant literature and theoretical framework made it possible to identify the main marketing strategies and activities within companies and thereby structure the interview script. The following table lists the different questions asked in the interviews and the categories associated with each.

Table 2. Interview

The impact of sustainability on hotel groups' marketing strategies and activities

No.	Questions	Category
1	What is the impact of the growing concern about sustainability on marketing strategies?	Differentiation and Positioning
2	What about the impact on the end consumer?	Segmentation (Consumer)
3	What about the impact on product policies or value propositions?	Product
4	What about the impact on pricing policies?	Price
5	What about the impact on distribution policies?	Distribution
6	What about the impact on communication policies?	Communication

3.5 Data collection procedure

Interviews were conducted between January 2022 and July 2022. Once all participants had been identified, they were contacted and informed of the purpose of the research. All participants signed a confidentiality agreement and agreed to participate in the study. Informing and sharing the research objectives beforehand with them meant that the interviews were conducted in a cordial, trusting atmosphere that enabled us to delve into very significant and relevant matters that were the object of the study. The in-depth interviews made it possible to investigate, broaden or explore in more depth issues relevant to each context.

The interviews, lasting between 45 and 75 minutes each, were conducted by one of the authors via Google Meet (video call). They were digitally recorded and transcribed in full. Participants were contacted via email and/or LinkedIn. Confidentiality and data protection conditions were explained to participants, and they were assured that they could withdraw from the study at any point, before, during, or after the interviews, if they chose to do so.At all stages of the research process, from data collection to data analysis, priority was given to reflection (Alvesson & Sköldberg, 2009). The authors considered the sample to be sufficient to explore the object of study. Moreover, the marketing and sustainability policies at the hotel chains surveyed were implemented at group level and at all hotels within the company. This could be seen in many of the interviews when the interviewees alluded to the types and characteristics of the hotels that make up their hotel offering worldwide.

3.6 Data Analysis

The data were analyzed using IRaMuTeQ software developed by Pierre Ratinaud, specifically designed to cater to the research needs of social sciences and humanities. The analysis involved a material linguistic examination of various document types. IRaMuTeQ is an R interface for Multidimensional Text and Questionnaire Analyses, facilitating information analysis and efficient data processing. This open-source program is very practical for working with large amounts of text, as it identifies patterns that would otherwise be very difficult to detect (Carvalho, 2019; Larruzea, 2019). Among the multiple functionalities offered by this R-based software, we used the Reinert method for our analyses. This enables top-down hierarchical clustering (Reinert, 1983, 1986, 1990) to analyse the lexical similarities and differences in texts and subsequently recognise repetitive lexical patterns (Portillo & Arroyo, 2020).

Following this method, text segments are classified according to the words or vocabulary they contain. Thus, the software algorithm analyses the texts, identifies the most frequent words and gathers the lexical worlds (sets of words that make up a discourse fragment) expressed by the interviewees (Larruzea-Urkixo et al. 2020). This analysis obtains classes that share similar vocabularies which, at the same time, differentiate them from all other classes. The chi-square test ($\chi 2$) is utilized to demonstrate the degree of association between words and their corresponding class. A factorial correspondence analysis brings to light the different variables associated with each class and enables the most characteristic text segments related to each one to be retrieved, which allows for a qualitative analysis of the data (Camargo & Justo 2013; Díaz-Iso et al. 2019). To analyse the information from the interviews, they were first transcribed, then a top-down hierarchical classification was conducted thanks to data processing. Lastly, the classes were interpreted. A comparison between the Reinert method and classical content analysis shows that the latter carries out the interpretative process when building the coding categories, while the IRaMuTeQ software shifts the interpretative process to later when the statistical analysis is conducted (Allum, 1998).

4 RESULTS

The complete corpus of interviews consists of 11,066 words classified according to their nature into active and supplementary forms. The active forms are composed of adjectives, adverbs, common nouns and verbs. Supplementary forms are composed of demonstrative, interrogative, numeral, possessive and supplementary adjectives, supplementary adverbs, definite and indefinite articles, unrecognised forms, supplementary nouns, demonstrative, indefinite, personal, possessive and relative pronouns and supplementary verbs. The Descending Hierarchical Classification (DHC) analysis of the interviews classifies the corpus into five classes. "The classes were interpreted by the three researchers independently and contrasted by a tourism marketing expert".

As can be seen in Figure 1, the 5 main classes (or lexical worlds) identified in the interviews conducted with the CEOs or sustainability managers of the 8 largest hotel chains by

turnover in Spain refer to the following aspects: the importance of positioning and communication concerning sustainability (class 1, comprising 17.3% of the text analysed); redefinition of the existing service offering to attain greater sustainability (class 2, accounting for 21.1% of the text analysed); the trend in the importance of sustainability in strategies (class 3, accounting for 20.25% of the text analysed); the importance of the sustainable location of hotels (class 4, accounting for 18.14% of the text analysed); and the costs associated with sustainability (class 5, accounting for 23.21% of the text analysed). An overview is provided in the following figure.
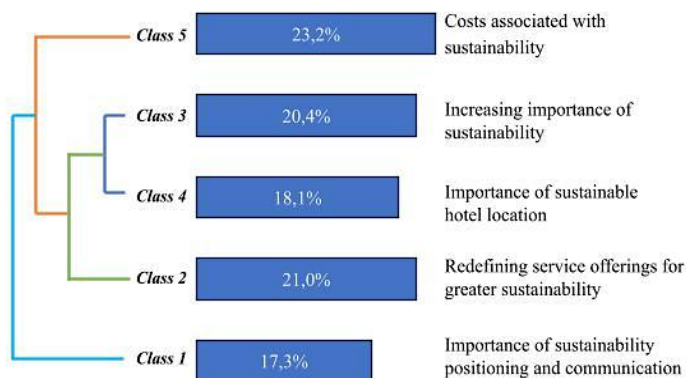

Figure 1. Dendogram of interview classes and percentage of the corpus accounted for by each class.

Class 1: Importance positioning and communication concerning sustainability.
The first class corresponds significantly to the categories of communication ($\chi2$= 19.82, P=<0.0001) and positioning ($\chi2$= 4.79, P=<0.02856). Participants believe that positioning and communication concerning sustainability help the brand to increase its perceived ($\chi2$=59.1) value ($\chi2$=29.43) for users. "Thanks to the sustainability approach we have been able to raise the real and perceived value of our hotels and improve the positioning of our brands in the market" (participant 1; score 252.33). At the same time, they believe that the recognitions obtained for their commitment ($\chi2$=14.56) to sustainability have served to communicate ($\chi2$=29.43) and reinforce ($\chi2$=24.42) their corporate values ($\chi2$=19.45). "All of the recognition obtained as a company committed to sustainability has certainly resulted in a significant improvement in our corporate reputation and has strengthened us as a high-value company by enabling us to communicate sustainability from different angles and perspectives" (participant 1; score 187.47). In addition, more projects ($\chi2$=18.76) and initiatives ($\chi2$=14.77) concerning sustainability have been promoted than at any other time, and the interviewees consider how important it is to communicate them correctly. "The big project this year is to launch our commitment to sustainability" (participant 5; score 80.35). "We are seeking ways to bring this sustainability proposition closer to our customers via attractive and easy-to-understand projects and initiatives" (participant 1; score 128.62). "Sustainability has been a challenge in terms of marketing, as we have to highlight all the initiatives we have performed" (participant 2: score 113.27). "We presented our sustainability project this year, which we hope to

communicate via our regular communication channels" (participant 7; score 104.08). Furthermore, this commitment to sustainability helps improve ($\chi2$=14.53) existing positioning and management models. "We view sustainability as a management lever that contributes to transforming and improving management models" (participant 1; score 187.47). These results can help to understand the relevance of communication in the brand's positioning and the significance not only of being committed to sustainability but also of being able to communicate it effectively.

Class 2: Redefining existing service offerings to achieve greater sustainability.
The second class is significantly related to the product/service category ($\chi2$= 26.76, P=<0.0001).
In this case, study participants consider that eliminating ($\chi2$=15.22), reducing ($\chi2$=15.22) and removing ($\chi2$=11.36) the use of plastics ($\chi2$=46.03) is a fundamental action to take when redefining their product and service portfolios. "In terms of amenities there have been substantial modifications due to the new regulation on the use of plastic and we have taken advantage of this circumstance to review our whole concept of amenities and align it with our sustainability policies" (participant 4; score 68.89). "We have started to remove all gel, shampoo and cream bottles from the rooms and replace them with wall dispensers" (participant 6; score 15.22). Thus, suppliers ($\chi2$=8.53), as intermediaries in the value chain, have come to play a key role in sustainability strategies. "We have changed our amenities policy and negotiated with suppliers to ensure all material is compostable and has the lowest possible environmental impact" (participant 7; score 48.82).
In this respect, the use of plastics in clothing ($\chi2$=15.22) for bed and bath linen also has a very significant impact due to the high volume ($\chi2$=11.36) of washing and changing in hotels of this type. "We commit to putting all plastics in a sack and use different colours for delivery and collection so that they can be reused for each service" (participant 6; score 95.42). On the other hand, the impact ($\chi2$=4.64) and footprint ($\chi2$=3.79) of certain actions are very significant. "The decision to remove a plastic bottle from a room may seem silly but you are still talking about 3,000 bottles a day across all the rooms so the impact is very significant" (participant 6; score 64.08) "We are going to work on sustainability based on 4 axes, one of which is the water footprint of our hotels". (participant 7; score 62.36). And all these changes have an impact on the experience of users, who often demand ($\chi2$=8.53) certain comforts and services to which they are accustomed. "High luxury demands exclusivity and this is detrimental to many of the eco-responsible philosophies" (participant 5; score 42.20).Therefore, these results imply that hotels must adapt their product and service offerings to the current scenario by taking care of the environment in which their hotels are located. In this context, they are required to reduce the use of plastics and promote the responsible use of water. However, it seems that there might be discordances depending on the positioning of each hotel, as consumers demand other types of conveniences.

Class 3: Increasing importance of sustainability.

The third class is closely associated with one of the participating hotel chains ($\chi2=12.99$, P=<0.00031).

In this case, the word year ($\chi2=23.54$) is included in the participants' responses as a comparison between what was done before and what is done now. "A few years ago we didn't do anything like that, but we have been adapting to all the recycling" (participant 3; score 124.33) "Maybe the commitment comes from before but there was a break during the financial crisis years and I think that COVID has accelerated this trend significantly" (participant 4; score 79.81). The association between sustainability and health ($\chi2=7.55$) after the pandemic is also recurrent. "The trend is unstoppable and is very much linked to health elements as the pandemic has made us more sensitive in everything related to our health" (participant 3; score 109.99). "I think our sector has a very promising future because for many people travel is important to their mental health, as leisure has become a necessary component of life" (participant 3; score 98.12).

Consumers ($x2 =23.18$) also play a prominent part in this trend as they see ($\chi2=29.68$), believe ($\chi2=28.26$) and consider it relevant ($\chi2=2.23$) to promote sustainable initiatives during their stays. "Experiences linked to sustainability are very much liked by our consumer" (participant 3; score 93.47). "Consumer demand after the pandemic has been much more radical and I would say that by going for sustainability we have a win-win situation; a win for our consumers and a win for our employees" (participant 6; score 51.48). "Consumers are increasingly aware and choose brands that have a genuine commitment to sustainability" (participant 2: score 29.08). The issue of user experience ($\chi2=5.71$) is also addressed by the increased use of local aspects ($\chi2=11.96$) at different hotels. "For some time now we have been trying to be more local because globalisation makes the experience too standardised: when you go to Mexico the experience has to be different than when you go to Tenerife" (participant 3; score 71.92). It seems undeniable that sustainability is definitely an imperative issue that must be integrated transversally in the companies´ strategies. Beyond being a trend, it is something absolutely necessary for society and for the planet.

Class 4: Importance of sustainable hotel location.

The fourth class is significantly associated with the distribution category ($\chi2= 11.88$, P=<0.00056). The location ($\chi2=4.82$) of hotels has become a key element in meeting the sustainability requirements of each hotel. "We cannot locate so close to the sea as before, we cannot break up an ecosystem, we have to consider the location of our hotels" (participant 6; score 85.49). "The sun is a very important energy source, and it is taken into account when choosing the location of the new hotel" (participant 6; score 63.31). "Hotel location was already a fundamental strategy, but now the sustainability variable for the new location has a very significant impact" (participant; score). Being sustainable ($\chi2=13.79$) or not also has an impact on the distribution networks used for room bookings. "For search engines, and specifically Google, the inclusion of "sustainable" as a hotel attribute is increasingly important and is a determining factor when choosing" (participant 7; score 41.16). They also have to cater for the opinion of booking intermediaries when considering ($\chi2=4.82$) their hotels as an option.

"Intermediaries such as Booking or Expedia draw on their own parameters when considering whether a hotel is sustainable or not and thus give you more or less visibility" (participant 4; score 20.79). In this case, regarding the location and distribution of the hotel's service offer, it becomes evident once the commitment to sustainability has been made, that the scenario has considerably changed. Likewise, the way of selling or positioning the product offer has shifted towards brokers that have sustainability as an indispensable attribute.

Class 5: The cost associated with sustainability.

The fifth and last class is significantly associated with the price category ($\chi2= 4.02$, P=<0.04496) and with one specific hotel chain($\chi2= 9.92$, P=<0.00163). Adaptation to new circumstances and the demands arising from the commitment to sustainability come at a price ($x2 =40.5$) that it is not clear whether the consumer ($\chi2=16.59$) is willing ($\chi2=20.37$) to pay ($\chi2=6.12$). "Users may get annoyed as they pay a high price for the room and are used to asking for towel changes after each use, and they are now denied this" (participant 6; score 61.55). "If the eggs at breakfast are not from free-range chickens consumers may give a negative review, however if you raise the price of breakfast to provide organic eggs, they are not willing to pay for it" (participant 4; score 114.33). "The fact that there are no organic or zero-kilometre kiwis or macrobiotic breakfasts is perhaps inconceivable in the luxury sector, where consumers are willing to pay more" (participant 6; score 107.74). "We need to look at which consumers are willing to pay more for what" (participant 2; score 65.43).

Table 3. Distribution of the classes and their respective units of meaning..

Class 1 Importance of positioning and communication concerning sustainability			Class 2 Redefining existing service offerings to achieve greater sustainability			Class 3 Increasing importance of sustainability		
Word	**Freq**	**χ2**	**Word**	**Freq**	**χ2**	**Word**	**Freq**	**χ2**
Value		59.10	Delete		15.22	Year		23.54
Perceived		29.43	Reduce		15.22	Health		7.55
Commitment		14.56	Remove		11.36	Consumer		23.18
Communicate		29.43	Plastics		46.03	View		29.68
Reinforce		24.42	Suppliers		8.53	Believe		28.26
Corporate		19.45	Volume		11.36	Relevant		2.23
Projects		18.76	Clothing		15.22	Experience		5.71
Initiatives		14.77	Impact		4.64	Local		11.96
Improve		14.53	Footprint		3.79			
			Demand		8.53			

Class 4 Importance of sustainable hotel location			Class 5 The cost associated with sustainability		
Word	**Freq**	**χ2**	**Word**	**Freq**	**χ2**
Location		4.82	Price		40.5
Sustainable		13.79	Consumer		16.59
Consider		4.82	Willing		20.37
			Pay		6.12
			Car		20.37
			Environment		20.37
			Balance		9.24

Many customers who stayed at the hotels surveyed rented a car ($\chi2=20.37$) to make the most of their stay. This issue is also of medium ($\chi2=20.37$) environmental concern ($\chi2=20.37$). "We have implemented a rooms package that includes a hybrid car and access to a premium breakfast which is gaining a lot of interest among some consumers because of the existing move towards environmental

protection" (participant 5; score 94.37). "Electric car charging is included in the price of the room and now also in the price of dining at our restaurants" (participant 5; score 53.20). The most significant challenge for hotels is to find a balance ($\chi2=9.24$) between meeting their sustainability targets and the cost to be passed on to consumers. "We have to find a balance, not everything is black and white, we have to be very careful when standardising or cutting back on certain things for some experiences" (participant 4; score 23.09).

This finding is particularly relevant as it is a key concern in business and environmental terms. Companies need to strike a balance between economic profitability and the pursuit of sustainability, between offering products appealing to different consumer segments and moving forward with their proposals to improve environmental sustainability. Table 3 illustrates the representation of the primary classes derived from the IRaMuTeQ top-down hierarchical classification analysis of the corpus of earlier interviews. In consistency with the reviewed academic literature, the results show five classes that address specific key tourism marketing strategies such as positioning, communication, service and product development, place and price.

5   CONCLUSIONS

This work has contributed to further understanding of what fundamental changes have been made in the marketing strategies and activities of the main hotel chains in their commitment to sustainability. In general, it can be affirmed that certain changes in marketing strategies and activities have a very significant impact in terms of achieving social and environmental sustainability. It also appears that the organisations interviewed have made certain changes in their marketing strategies and activities to reflect their growing concern for sustainability. It should be noted however that, as shown in the analysis above, some variables and strategies are more significant than others. The interviews distinguish between 5 classes; (1) importance of positioning and communication concerning sustainability (17.3%), (2) redefining existing service offering to achieve greater sustainability(21.1%), (3) increasing importance of sustainability (20.25%), (4) importance of sustainable hotel location (18.14%) and (5) the cost associated with sustainability (23.21%). The class with the greatest presence in the text is class 5, which refers to the price-related marketing mix variable (23.21%). Commitment to sustainability implies costs, a culture and, above all, a conviction that sometimes requires a willingness to pay a higher price to cover the associated costs, and at other times however, it requires a change in certain consumption patterns that entails giving up certain comforts or acquired habits. All of this is associated with costs that are reflected in the prices of the services offered. The second biggest group in terms of presence in the corpus refers to another of the variables in the marketing mix: product (21.1%). It implies the redefinition of the services offered with the aim of achieving a lower environmental impact. This involves modifying everything from room amenities to breakfast products, hotel lighting, laundry circuits, etc., as detected based on the interviews. The third biggest category refers to the trend in the importance of

the concept of sustainability (20.25%) in the definition of marketing strategies. This shows the fundamental role that sustainability plays nowadays in the definition of company strategies, as an axis on which the companies in the sector pivot. The next biggest category in terms of presence in the text analysed is class 4, which is related to the location or distribution of the services offered (18.14%). This refers to another of the marketing mix variables: distribution. The fifth and final category covers another marketing mix variable - communication - and its relationship with the positioning strategy (17.3%). In this sense, it is clear that the positioning strategy accompanied by a series of communication activities significantly reinforces the consumer's perception of the hotel chain. In summary, the 4 Ps of the marketing mix appear in the analysis as significant classes (with 62.45%), with the price variable standing out above the rest. The significance of the positioning strategy over the other three marketing strategies defined in the theoretical framework (segmentation, targeting and differentiation) is also relevant in the corpus.

5.1 Implication of research findings
We believe that the findings have valuable implications for other hotel managers as they offer efficient marketing guidelines for enhancing sustainability and improving consumer relations. For instance, these results can help to understand the relevance of sustainability communication for the improvement in brand's positioning. Furthermore, these results help to adapt the hotels´s product and service offerings to the current scenario of sustainability requiring a better management of the use of plastics water consumption. We would like to highlight that there might be discordances between the hotel´s positioning and their consumer's convenience expectations. It is undeniable that sustainability is definitely an imperative issue that must be integrated transversally in the companies´ strategies. There has been an important shift of the location and distribution of the hotel's service offer. Lastly, pricing and sustainability are particularly relevant for a business and environmental perspective.

5.2 Practical and societal implications
We believe this work will have valuable implications for hotel managers. In instance, to know what underlies the marketing strategies of the hotels involved in the study. It would also be interesting to see/contrast/compare if there is alignment or not with what the rest of the hotels have said. Lastly, it would be very interesting to assess the progress made in terms of sustainability compared to the rest of the hotels.

We also consider that our study has five important implications on a societal level. In the first place, to ascertain the attitude of the hotel groups with regard to sustainability. Secondly, to understand the evolution of sustainability issues in each of the hotels. Also, to find out what the hotels are doing (specific actions) in the face of sustainability challenges. Furthermore, to distinguish the commitment with regard to the different aspects that sustainability encompasses. And finally, it is interesting to see the opinion of the hotel groups regarding the role that the greater or reduced commitment to sustainability plays in the users' choice of hotel.

5.3 Limitations

This study is not without limitations and we therefore consider that the following recommendations may be valid for future researchers. The sample could be extended to other hotel chains with lower turnover. This study is qualitative in nature, so a quantitative study could help to consolidate the findings more conclusively. And finally, it would be interesting to know the demand perspective (customers) as this study focuses exclusively on the supply view. Furthermore, we believe that this exploratory study should be complemented by the view of other stakeholders, such as tourists, visitors, residents, travel agencies and policy makers. It would also be very interesting to establish to what extent consumers are willing to pay a price premium to fund sustainability. In this sense, it would be very relevant to conduct a study based on different consumer segments and analyze their sustainable consumption patterns.

5.4 Future research

We propose a further series of future lines of research to address the previous limitations: to conduct a descriptive study of the hotel chains operating in Spain; to explore the main hotel chains in another country, for example in the USA, and then make a comparison; to consolidate the findings more conclusively through a quantitative research; and finally, to explore the demand perspective (customers) as this study focuses exclusively on the supply point of view.

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