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Andrew M. Levey

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AN ANALYSIS OF THE ENVIRONMENTAL CONTENT OF LAS VEGAS STRIP
HOTELS

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Table of Contents

PART ONE

Introduction.....3

Objective.....5

Justification.....6

Constraints.....7

List of Terms.....7-8

PART TWO

Literature Review

 Corporate Environmental Responsibility (CER).....9-14

 Strategic Management Theory.....15-16

 Applying Traditional Marketing to Green Marketing.....16-18

Part Two Summary.....18

PART THREE

Part Three Introduction.....19

 Table 1-Las Vegas Hotel Rooms and Square Footage.....20

 Results: Web Content Analysis.....21

 Table 2-Web Content Analysis.....22

 Results: Annual Report Analysis.....23

 Table 3-Annual Report Analysis.....24

 Executive Level Interviews..... 25-29

 In-Person Examination.....29-30

 Outside of Las Vegas.....31-34

 Table 4-Web Content Analysis Revisited.....35-36

Conclusions.....36-38

Limitations.....38

Implications and Future Research.....39

REFERENCES40-45

Part One

Introduction

As humans, we are living in a world with limited natural resources and systems that are being exhausted by boundless and uncontrolled expansion. The environment and the impact we have on it as humans can be traced over millennia. It is only in the past thirty years that humanity has started to realize the effects and footprints that we are leaving for future generations. The arrival of the counter cultural movement of the 1960's and the growing awareness of pesticides and pollutions from books such as Rachel Carson's *Silent Spring* (1962) exposed the world to new environmental dilemmas. Pollution and chemical exposure became the main concern, and the products and companies that were causing them were investigated and exposed. This opened consumers' eyes to a new way of thinking, a new era that experts have called the First Age of Green: ecological marketing (Peattie, 2001). Changes began through new regulations and new environmental legislation. Large factories and corporations were forced to change their end product and were very reticent to comply with this new legislation. Many executives believed it hurt the companies and heavily increased their costs of running a business (Peattie, 2001). There were very few companies that accepted and embraced this social change and the majority of the population was unaware.

The Second Age of Green (Peattie, 2001) began in the late 1980's with the population beginning to realize the environment's vulnerability. AIDS had been spreading fast, famine was affecting many third world nations, and humans began to realize our vulnerability as well. More natural disasters caused by humans were being

exposed due to expanding media coverage. The chemical plant explosion that killed 22,000 in Bhopal, India; the hole in the Ozone layer located above the Antarctic; the Chernobyl Nuclear Plant meltdown, and The Exxon Valdez oil spill all made the environment a mainstream issue.

In the late 1980's and early 1990's the idea of global sustainability was introduced. Sustainability first gained notice through publication of the United Nations "Brundtland Report" (WCED, 1987). The idea of sustainability is that people can produce and consume at a material standard of living without endangering future generations. It involves using natural resources at a rate in which environmental systems or human activity can replenish them (or a renewable alternative can be substituted). Peattie (2001) refers to sustainability as a way of producing waste and pollution at a rate in which environmental systems can absorb them without impacting their viability. Sustainability became the first environmental concept that governments, companies, environmental groups could agree on. It became the first idea to tie together environmental issues, legislation, and economics, and served to highlight their interdependence on a global scale.

The sustainability idea launched a renaissance of green ideas and concepts. Clean technology took the concepts developed in the First Age for the corporations and factories; instead of focusing on the end concept, it focused on the design and process of production of goods in a way that was less harmful to the environment. The consumer field also changed. Consumers quickly became so called "green consumers" and through the past events and expanding media coverage became much more aware of what they were buying and what policies they were supporting.

As we enter the Third Age of green marketing, companies and corporations face new challenges from socially conscious consumers, the media, and their shareholders. Most research within the literature has focused on the efficiency of manufacturers and corporate policies. Many companies have noticed the green consumer and followed suit. The green consumer is one of the many outside factors that companies face. There are some that believe that one of the drivers of going green and becoming environmentally responsible is the competitive advantage it brings (Dummet, 2004). There are other factors that influence the corporation. Dummet (2004) uses the term Corporate Environmental Responsibility to describe the factors. It has been difficult however for corporations to put theory into practice and even more difficult for them to measure success. The ways in which the environmental policies are marketed are another issue. On this topic, there has been relatively no research in the service industry; furthermore, no research in the hotel industry has covered it.

Objective

This study examines the environmental content of hotel properties websites. The central question of this study is whether Las Vegas Strip properties have gone green, or plan to go green. Thus, the purpose of this paper is to examine the frequency of the environmental content of twenty-three Las Vegas Strip hotels' websites as well as five upcoming hotel projects and one hotel expansion project on the Strip. The twenty-eight hotels are all located along Las Vegas Boulevard, also known as the Strip. All properties examined have over two thousand rooms each. The goal is to determine how prevalent and important the environment is to these Strip properties and if the verbiage on their

websites matches their actions. Each hotel's website will be thoroughly examined to determine what they have posted as far as their current and future environmental plans and policies with respect to the following four areas: management support and concerns for the environment; environmental planning; environmental leadership qualities internally and externally; and validation or certification of environmental programs (Jose et al 2007). If there are no results from the website search, the corporation's annual reports will be examined for such content. The next step after that is to conduct interviews with employees, managers, and executives of the hotels.

Justification

Between the end of 2007 and 2011, 45,000 hotel rooms will be added on the Las Vegas Strip (Stutz, 2007). The environmental impact these rooms will have as far as construction, employment, housekeeping, sanitation, and energy use is enormous. MGM Mirage's CityCenter in the center of the Strip is the world's largest construction project. City Center and Boyd Gaming's Echelon Resort are attempting to become LEED certified and market to eco-tourists. It is important for these hotels to properly market their environmental policies and can also help them create or solidify an identity as innovator or leader in the community. Many other industries have started or are in the midst of changing their environmental policies. Other industries have begun to market to the green consumer.

Constraints

There are several constraints involved in this study. The subject matter itself is relatively new and there is little if any research involving hotels; in particular, Las Vegas hotels and their policies have not been examined for green activities. Secondly, the information is not readily available, and companies are not willing to release information due to competition. This study also assumes that the Las Vegas casino-hotel industry is different than the rest of the hotel industry in the United States.

Terms

The following terms are used in discussion of this paper:

LVSH- Las Vegas Strip Hotels;

Sustainable- A way of producing waste and pollution at a rate in which environmental systems can absorb them without impacting their viability (Peattie, 2001);

Green Marketing- The holistic management process responsible for identifying, anticipating and satisfying the requirements of customers and society, in a profitable and sustainable way (Peattie, 1995);

Green consumer- One who avoids products which endanger the health of consumers or others; significantly damage the environment in production, use, or disposal; consume disproportionate large amounts of resources; cause unnecessary waste through over-packaging, excess features, or an unduly short lifespan; use materials derived from endangered species or environments; and adversely effect other countries or other large areas of land (Peattie, 1995);

Corporate Environmental Responsibility (CER)- The drivers that make major companies become aware of their environmental responsibility. The drivers that lead those companies to develop policies, and for an even smaller number of companies, the drivers that make them act on these policies and actually change their practices to become more environmentally responsible (Dummet, 2004);

LEED- Leadership in Energy and Environmental Design, a third party certification that a construction or building project is environmentally responsible, profitable, and a healthy place to work (USGBC, 2007).

Part Two

Literature Review

The literature is limited regarding green policies and activities in the hotel industry. There is very little literature involving the green policies and activities of Las Vegas hotels and casinos. Three separate areas were examined, Corporate Environmental Responsibility (CER), Strategic Management Theory, and Applying Traditional Marketing Methods to Green Marketing. The three areas are intertwined and can serve as a framework for a hotel that is considering adapting green policies.

Corporate Environmental Responsibility (CER)

Dummet (2004) conducted qualitative research by interviewing chief executive officers (CEOs) in order to determine the drivers of CER. Interviews and questionnaires were used to determine the companies' environmental policies and considerations as well as the CEOs' attitudes. Attitudes towards corporate policies versus governmental and legislative policies were also questioned. Lynes and Dredge (2006) believe that the drivers exist along a continuum that range from internal to external, where some drivers exist within the specific framework of the corporation or the industry. Through his research, Dummet found common themes that both CEOs considered major drivers in their industries. These were the ten major drivers that Dummet (2004) found to influence CEOs in their determination to go green and whether they came from within the organization or externally: Government Legislation or Threat of Legislation (External); Cost Savings (Internal); Market Advantage (External); Protection or Enhancement of Reputation or Brands (Internal); Avoiding risk, or Responding to Accident or

Environmental Threat (Internal); A “Champion” within the Organization (Internal); Pressure from Shareholders (External); Pressure from Consumers (External); Pressure from Non-Government Organization (External); and, Societal Expectations (External).

Government Legislation appears to be the leading reason corporations decide to go green. Emtairah et al. (2002) indicated that of 70 corporations studied with good environmental credentials, 49 (70 percent) indicated that government legislation was what drove them to take greater environmental responsibility. A study by Faruk (2002) indicated that 79 percent of 700 senior level managers interviewed in the United Kingdom indicated that the government needed to encourage corporations to behave responsibly. In his interviews and research, Dummet (2004) asked CEOs and executives what they thought would motivate corporations to go green in the future. The most common response was that government legislation would be the main reason for corporations to go green. One CEO said the only thing that would make corporations take environmental responsibility seriously was government legislation. There have been discussions of having governments offer incentives as an attempt to motivate corporations; some legislation has even issued penalties, taxes, and sanctions as motivation for going green. The idea is to create a level playing field by which everyone can abide (Dummet, 2004).

The cost savings that corporations can make through going green does not yet seem to be fully realized. In Dummet’s research, the subject of cost savings did not come up until he brought it up himself to the executives and CEOs. The common view is that launching new initiatives are expensive and there are many initial and ongoing costs involved (Dummet, 2004). There are costs of training, purchasing new equipment, and

purchasing new materials. Reducing waste, recycling, and limiting materials used can lead to cost savings. One executive interviewed believed that if going green can become a “bottom line” issue then it would truly provide a business reason for making that decision (Dummet, 2004). While examining why accommodation establishments (hotels and lodges) go green, Tzschentke, Kirk, et al (2004) found that many UK hotel proprietors go green because of their inability to exert control on the energy usage of the customer which leads to higher utility costs. They observed smaller hotels and inns and found that it was more cost effective to go green as these small properties needed to operate efficiently within financial constraint.

One CEO described going green’s marketing advantage as “...some leverage in terms of marketing...” (Dummet, 2004) It is also a way for companies to distinguish themselves among tight competition. Miller (2001), in research of the UK tourism industry, argued that marketing advantage is really a stepping stone to public relations benefits. The advantage is the positive word of mouth associated with the product.

Branding appears to be the second most important driver behind going green. Dummet (2004) indicated that this topic was enthusiastically received and discussed when he met with the CEOs and executives. One CEO said branding was a major driver and even used the term “brand promise”. He followed that up by saying: “We promise to make life easier, more comfortable and safer, and of course that extends into environmental responsibility as well” (Dummet, 2004).

Avoiding risk, or responding to accident or environmental threat is a driver that is closely linked to the previously mentioned brand reputation and protection as corporations are seeking to avoid reputation damaging incidents or accidents that have

affected their competitors or their industry. Dummet's interviews with CEOs indicated that fear was a motivating factor. "Executives do not want blood on their hands and do not want to be known as the one who let an accident occur" (Dummet, 2004). Two corporate related disasters, the Bhopal Dow chemical explosion in 1984, and the Exxon Valdez oil spill in 1988 served as a wakeup call for executives. These two disasters were brought to the forefront of the public's attention and impacted the public's perception of these companies. One Australian CEO commented that "...it's an awareness that things have to change. We are providing products to a global market; you have to embrace environmental considerations" (Dummet, 2004).

According to Dummet, there needs to be a "champion" within the organization, someone who is driving the change within the organization. Most CEOs and executives interviewed believed that CER had to come from someone who was passionate about the environment and driving their respective corporations towards that goal. Many executives said that becoming a "good corporate citizen" was the goal and they as CEO had to lead the charge. In 1995, Scandinavian Airlines (SAS) was one of the first airlines to publish an environmental report. Since then, SAS has published an environmental report on an annual basis which details the ways they are limiting or reducing waste and pollution as well as policies they are launching throughout the corporation (SAS, 1995). SAS's CEO's first goals during the early stages of going green were to achieve employee buy in. He believed that it had to be done through a top-down approach in which he led by example and encouraged his employees to follow suit. He related it to what he called "Scandinavian Spirit" (SAS, 1998), a way of living and taking pride in your home, environment, and way of living.

Pressure from shareholders surprisingly was not one of the leading drivers of CER. CEOs believe that disasters such as the ones in Bhopal and the Exxon Valdez lead to only short term drops in stock prices (Dummet, 2004). One former oil executive noted that there are three types of shareholders: Institutional, Employees, and “Mom and Pop”. The executive claimed that institutional shareholders rarely asked or cared about the environmental impact and were more interested in their returns. He also claimed (surprisingly) that employees were the ones who most frequently asked about the environmental policies. Employees are stakeholders from two points of view as they rely on their salary from the company and, if they have been there long enough, they are also investing in their retirement. Corporations are also adding social responsible mutual funds into their 401(k) and pension programs (Dummet, 2004). The “Mom and Pop” shareholders’ concern for the environment is growing slowly as well. A new wave of investors has come along who only purchase shares in environmentally friendly companies.

Pressure from consumers is seen as a tertiary driver as most executives believe government legislation is primary driver (Dummet 2004). The executives and CEOs interviewed by Dummet did not believe that there was too much pressure to go green from consumers as of late 2004, but they believed that consumers would become more educated and exert more pressure on the corporations over the next five years. Since 2004, consumers have become more aware of the deteriorating conditions of the environment and what corporations are or are not doing to go green. Some CEOs are apprehensive of the pressure from consumers as they believe that consumers are being

pressured in turn by non-government organizations (NGO) such as Greenpeace, Friends of the Earth, and other activists.

Most CEOs and executives have stated that they are wary of any influence from NGOs. The general perception of NGOs from an executive's point of view is that they "...massage perception and it is very seldom that they (NGOs) do anything on the ground to change realities" (Dummet, 2004). Some corporations have actually brought in NGOs as consultants. The CEOs that have done this believe NGOs can act as an advocate for companies to become more environmentally responsible (Dummet 2004). This has created some controversy as well as some NGOs have complained that those that have been advocates to major corporations have sold out or are now "in the pocket" of large wealthy organizations. Monbiot (2002) strongly condemns the practice of companies hiring environmental NGOs to help them green their image. He believes it defeats the purpose of the NGO.

Another driver closely intertwined with pressure from consumers, shareholders, and non-government organizations; societal expectations are largely influenced by culture and the media. In the case of SAS, management believed in embodying the "Spirit of Scandinavia" as they went green. In the Scandinavia countries, going green has become an inherent part of the culture, and SAS wanted to identify itself with that culture (SAS, 1998). SAS's CEO stated that Scandinavians value the environment and want to keep their land green and their air clean and SAS wanted to respect those wishes.

Strategic Management Theory

The ten drivers tie in closely with the Strategic Management Theory established in the early 1960's by Alfred Chandler. The theory further developed when economist Milton Friedman's (1962) neoclassical view that the organization's main objective is to maximize shareholder wealth was published. Friedman's work created a new way of doing business and corporations began to realize that they needed to set specific objectives and strategies in order to appease the shareholders. However, in recent years, scholars have changed their view and believe it is possible to achieve shareholder wealth and corporate responsibility at the same time. Fowler and Hope (2007) believe that corporations can achieve "win-win" scenarios as companies can maximize returns while making some progress towards the implementation of sustainable business practices. Fowler and Hope (2007) also argue that there are serious competitive implications of incorporating sustainable and environmental conscience practices into company strategy. They believe that a company's commitment to the environment paired with specific strategies and objectives can ultimately maximize returns to the shareholders. They have built theory upon Stuart Hart's (1995) Natural Resource-Based View (NRBV). Their research indicates that while the environmental issue has not yet affected some industries, proactive corporate environmental strategy can lead to development of important corporate responsibilities and capabilities which can increase the corporation's competitiveness. NRBV places emphasis on a firm's resources, suggesting that by identifying the resources that are of strategic importance and employing them effectively, firms can achieve a competitive advantage. Hart's (1995) NRBV framework comprised of three interconnected strategies: pollution prevention; product stewardship; and,

sustainable development. Fowler and Hope discuss how Hart theorized that one scenario for these three strategies is a sequential interdependence where the firm must first build its capability in pollution prevention prior to focusing on product stewardship and in turn, needs to be capable in both of these areas prior to initiating a sustainable development strategy. They believe that it may be that companies must incorporate the environmental strategies just to survive (Fowler & Hope 2007). The corporation must also understand how the effectively market their green strategies to the consumer.

Applying Traditional Marketing to Green Marketing

Rex and Baumann (2007) argue that any corporation can take the traditional marketing mix (product, place, price, and promotion) and adapt for the green consumer and even market it to the non-green consumer. They use Kotler's (2001) marketing strategy framework of demand measurement, segmentation, targeting, and positioning in order to demonstrate how traditional marketing can be used for a green product and create a competitive advantage. It can broaden the market and capture new green consumers.

The rise of the green consumer and green related issues has demonstrated that there is a demand for the green product. Rex and Baumann (2007) believe that using traditional marketing demand measurement will identify the needs and wants of the consumer. They argue that currently most corporations are focused on making green products, but not the green products that the consumer wants; therefore, the true market is underutilized and under-penetrated.

Rex and Baumann (2007) also argue that green marketing and segmentation is also limited as it is focused solely on existing green consumers. They believe that by using traditional marketing, the market should be analyzed and segmented by existing green consumers and a much broader range of consumer. Companies can use traditional marketing to convert existing consumers into green consumers.

The final area covered by Rex and Baumann is product positioning. In the past, they argue that companies had just slapped an “eco-friendly” label on the product. They reason that by using the full range of the traditional marketing mix, the product can gain more exposure to the public. Pricing decisions (price), distribution channels and assortment (place), and advertisement and promotions (promotion) added to traditional green marketing can lead to competitive advantages. According to their research it is difficult to create a competitive advantage in a green market when the market itself is limited.

The literature is limited and there is relatively no information available on the green activities and policies of the Las Vegas hotel industry. However, the three topics most prevalent in the literature are all interrelated and can serve as a blueprint for those companies seriously considering adapting green activities.

A Las Vegas property can use Corporate Environmental Responsibility (CER) in order to determine the drivers and even determine if drivers exist for the property to launch green programs. It can also provide the property with a chance to look from the outside to see how the community views and how they can improve their public image. An improved public image can lead to higher exposure, profits, and reputation.

The co-mingling of the Chandler's Strategic Management Theory and Hart's Natural Resource-Based View (NRBV) (1995) can lead the property to change their image and reputation through green activities which can lead to programs that can reduce costs over time. Those reduced costs will lead to high profit margins, which will then maximize shareholder returns; thus, bringing the property back to Friedman's (1962) belief that the organizations main objective is to maximize shareholder wealth.

Rex and Baumann (2007) believe that most businesses that participate in green activities focus on greening for the sake of greening and ignoring the customer's green beliefs in the process. A hotel property needs to seek out its green consumers and understand their needs before going forward with any green activities or policies. Rex and Baumann (2007) also advise the business (in this case hotel property) to market green using traditional methods (the previously mention four P's: product, price, place, and promotion) in order to reach a much broader consumer base.

The three topics examined in the literature present strategies that are ideal in theory. There are few mentions of these theories and ideas in practice in the hotel industry, and even fewer in the LVSH. How are these properties in Las Vegas dealing with this issue now, preparing, planning, or waiting? The content analysis in the following section will determine the answer.

Part Three

Using a content analysis, the study's goal was to determine what if any environmental content existed on the corporate websites of twenty-three Las Vegas Strip Hotels (LVSH), as well as five upcoming projects and one hotel expansion project (Caesars' Palace) that will be finished within the next two years Las Vegas. In total, there were twenty-eight current and upcoming properties examined. The twenty-eight LVSH are located along the Las Vegas Boulevard, better known as the Strip. LVSH were the only hotels examined, hotels off the Strip, such as The Palms, Red Rock Station, the Hard Rock Hotel, and other hotels located off the Strip were not examined. All properties examined have over two thousand rooms. The content analysis was conducted in four stages. The first stage was an examination and analysis of the corporate websites. The second stage was an analysis of the corporation's annual report. The third stage was to contact executive level employees and/or employees in the marketing department of the hotel in order to conduct interviews. The last stage was to visit the hotel property in person for any mentions of environmental programs or observations of any policies or practices in action. Since only one property's executives responded, that one property was the only one visited. Table one lists the properties examined by the number of rooms and the square footage of the casinos in these properties (Vegas.com, 2007).

TABLE 1**AS NOVEMBER 2007**

HOTEL	NUMBER OF ROOMS	SQUARE FOOTAGE
Ballys	3,000	67,000
Bellagio	3,000	116,000
Caesars Palace	3,300	166,000
Circus Circus	3,800	101,000
Excalibur	4,000	100,000
Flamingo	3,800	77,000
Harrahs	2,700	86,000
Imperial Palace	2,600	75,000
Luxor	4,400	120,000
Mandalay Bay*	4,400	220,000
MGM Grand	5,000	171,000
Mirage	3,000	100,000
Monte Carlo	3,000	90,000
New York New York	2,000	84,000
Paris	2,900	85,000
Planet Hollywood	2,700	100,000
Riviera	2,200	110,000
Sahara	1,800	85,000
Stratosphere	2,400	80,000
The Venetian	3,000	120,000
Treasure Island	2,800	95,000
Tropicana	2,000	61,000
Wynn	2,700	111,000
TOTAL	70,500	2,420,000
AVERAGE	3,065	105,217

UPCOMING PROJECTS

HOTEL	NUMBER OF ROOMS	SQUARE FOOTAGE
Caesars Expansion	1,000	37,000
City Center Project	5,000	500,000
Cosmopolitan	3,000	75,000
Echelon Place	5,500	140,000
Palazzo	3,000	105,000
Wynn-Encore	2,000	74,000
TOTAL	19,500	931,000
AVERAGE	3,250	155,167

TOTAL	90,000	3,351,000
AVERAGE	3,214	119,679

*Includes Thehotel

Results

Website Content Analysis

A thorough search was conducted by navigating (point and click) through four main sections of each property's website. The four sections examined were the home page (or main introduction page); the menu bar, which lists all sections of the website; the news section, which provides detail of all the latest news related to the property; and, the 'about us' or 'about the company' section, which provides the vision statement, philosophy, methods, and beliefs of the company. The about us section often links to the corporation's main page and/or investor information, which then leads to annual reports. The content analysis of the website looked for the following seven key terms: Green, Sustainable, Green Consumer, LEED, Environment, Environmental, and Recycling. If anything were to be found with the key terms, it then would be determined if it were from the company itself (internal) or an outside source (external). If the source were internal, it would be noted which section of the website and how it was mentioned. If the source was external, then external source would be listed along with the date. The key terms were also noted. Table two shows the check list used in examining the twenty-eight properties' websites.

TABLE 2

HOTEL	WEBSITE CONTENT				
	HOME PAGE	MENU BAR	NEWS	ABOUT US	
Bally's	No	No	No	No	No
Bellagio	No	No	No	No	No
Caesars Palace	No	No	No	No	No
Circus Circus	No	No	No	No	No
City Center Project	No	No	Yes, 7 articles	No	No
Cosmopolitan	No	No	No	No	No
Echelon Place	No	No	No	No	No
Excalibur	No	No	No	No	No
Flamingo	No	No	No	No	No
Harrhahs	No	No	No	No	No
Imperial Palace	No	No	No	No	No
Luxor	No	No	No	No	No
Mandalay Bay*	No	No	No	No	No
MGM Grand	No	No	No	No	No
Mirage	No	No	No	No	No
Monte Carlo	No	No	No	No	No
New York New York	No	No	No	No	No
Palazzo	No	No	No	No	No
Paris	No	No	No	No	No
Planet Hollywood	No	No	No	No	No
Riviera	No	No	No	No	No
Sahara	No	No	No	No	No
Stratosphere	No	No	No	No	No
The Venetian	No	No	No	No	No
Treasure Island	No	No	No	No	No
Tropicana	No	No	No	No	No
Wynn	No	No	No	No	No
Wynn-Encore	No	No	No	No	No

*Includes Thehotel

INTERNAL/EXTERNAL	ARTICLE	DATE	KEY WORDS MENTIONED
External	Las Vegas Life	November, 2007	LEED
External	In Business Las Vegas	October, 2007	LEED, Sustainable
External	Hospitality Construction	September, 2007	LEED
External	Urban Land	September, 2007	LEED, Sustainable, Recycling
External	Architectural Record	April, 2007	LEED, Sustainable, Recycling
External	Robb Report Homes	April/May 2007	LEED, Sustainable, Recycling
External	Las Vegas Sun	January, 2007	LEED, Sustainable, Recycling

Annual Report Analysis

The website content analysis returned disappointing results. Only one property, the upcoming CityCenter Project by the MGM Mirage Corporation, mentioned their green activities and policies. For this project, there were seven mentions, all of which were from external sources. Thus, after the first stage content analysis, no conclusions were reached and a deeper analysis needed to be conducted. The next level of research was to examine the annual reports of the corporations that run the LVSH. Since more than half the properties examined in the research are owned by two companies, only eleven annual reports were reviewed. The most current annual report was reviewed. For some properties, this was the 2006 annual report; for others, it was the 2005 annual report. A similar keyword search was completed looking for the following words and their placement contextually: Green; Sustainable; Green Consumer; LEED; Environment; Environmental; and Recycling. The results are shown in Table three.

TABLE 3

HOTEL COMPANY	ANNUAL REPORT*	YEAR**	KEYWORD ANALYSIS***
Boyd Gaming Echelon Place	YES	2006	0
Harrahs Ballys Caesars Palace Flamingo Harrahs Imperial Palace Paris	YES	2005	1 Total, "Environment"
MGM MIRAGE Bellagio Circus Circus City Center Project Excalibur Luxor Mandalay Bay* MGM Grand Mirage Monte Carlo New York New York Treasure Island	YES	2006	6 Total, 2 "Green" and 4 "Environment"
Las Vegas Sands Palazzo The Venetian	YES	2006	0
Wynn Resorts Wynn Wynn-Encore	NO	N/A	N/A
Cosmopolitan	NO	N/A	N/A
Planet Hollywood	NO	N/A	N/A
Riviera	YES	2004	0
Sahara	NO	N/A	N/A
Stratosphere	NO	N/A	N/A
Tropicana	NO	N/A	N/A

**Note that YES indicates if an Annual Report was available, NO indicates if an Annual Report was unavailable*

***Denotes the most recent year if an Annual Report was available*

****Notes the number of mentions of the following: Green; Sustainable; Green Consumer; LEED; Environment; Environmental; and Recycling*

The MGM Mirage Corporation had the only significant mentions of anything environmentally related. The keywords appeared when discussing the upcoming CityCenter Project. Another difficulty was that some corporations did not have their latest annual report available (i.e., Harrah's, Wynn Resorts, the Riviera, the Stratosphere, and the Tropicana). Some of the other properties are individual owned and not publicly held, thus, there is no annual report available for them (such as Cosmopolitan, Planet Hollywood, and the Sahara).

Executive Level and Employee Interviews

The next level of analysis was to conduct interviews with executives and employees of the hotels in order to see if they had any environmental plans, were creating any new policies, or were even doing their own activities to contribute to the environment. Emails and phone calls were used to get in contact with the executives and employees. Out of the thirty-three combined emails and phone calls, only three were returned. Two of the emails returned lead to phone interviews. (Coincidentally, those two emails were from two employees within the same hotel, in the same department). One of the other responses was for an off-Strip property that is not applicable to this study.

The following is the transcript of the interview taken place between the author and John Smith, an executive with the Convention Center Department at the Mandalay Bay Hotel on October 25, 2007.

What if any actions are you taking regarding the environment within your property?

“In 2006, the recycling program started at Mandalay Bay. We hired an outside company to come in and organize our garbage and to determine what can be recycled and what can’t. We actually have people who sift through our garbage and pull out the glass, the paper products, and the plastic products.”

How do you measure the success of a program like that?

“It’s measured in yards. We usually go through four to five hundred yards of garbage per day. So far from what we’ve seen, roughly seventy percent of that can be recycled. So we recycle roughly three-hundred to four hundred yards of waste per day depending on the capacity of the hotel. This is the first MGM Mirage property to do this; the other properties are not yet ready for this yet.”

What actions are you taking regarding the environment within your department?

“Convention center started recycling in August 2007. We recycle all cardboard, glass, carpet, and even carpet pads used for all conventions. We also offer the options of using recycled paper products and corn-based plastic ware, which is fully biodegradable, to all of our conventions. Mandalay Bay is actually pilot program for the rest of MGM Mirage, and what we’re doing in the convention center is really guiding the rest of the hotel.”

Tell me more about what you meant by that last statement, the “guiding the rest of the hotel”?

“Like I said before, Mandalay Bay is really the pilot program for the rest of the MGM Mirage Corporation. We have weekly meetings with the CityCenter coordinator to

discuss what we're actually doing in the hotel and comparing it to what they have planned for the CityCenter Project.”

So what other activities or policies are you implementing?

“There are ten cooling towers at Mandalay Bay. They used to be ten interdependent units that were running at all times. We retooled them so there are ten independent coolers so during slow season coolers can closed down. Also, all thermostats were changed to programmable thermostats, programmed from a central location in the hotel. Occupancy is checked daily to ensure room energy is not wasted. We've also decided to go to a paperless format for our convention bills. We send out the bill through an email or a CD-ROM. We've also changed all our lighting, excluding the neon sides outdoors. Regular incandescent light bulbs have been replaced by LED light bulbs (the most expensive light bulb on the market and a step above energy efficient compact fluorescent light bulbs (CFLs)). We believe the savings in the energy will help us pay off these light bulbs in six to eight months.”

What, in your opinion, is the driver behind these changes in policies?

“We decided to be proactive. Our executives started to attend sustainability meetings with environmental groups. For us, looking good in the community is the most important area. We want our guests to know we care about them and the community around them.”

Why are there so few documents, literature or articles published about what you at MGM Mirage are doing?

“Well that’s partly our choice. We want to make sure we have all our ducks in a row before we go announcing it to the world and leaving it open to critics and naysayers.”

What is the next step for your department and MGM Mirage?

“By the end of 2008, all MGM Mirage Properties will have a full blown recycling program and somewhat similar energy programs as Mandalay Bay. We’re excited at Mandalay Bay as were about two weeks away from making a major press release.”

The next interview was conducted with Joe Blank, a catering department manager within the Mandalay Bay Convention Center. A similar question format was used, and questions were also asked if the author felt that it was necessary to follow up. The transcript of this interview is shown below.

What if any actions are you taking regarding the environment within your department?

“We really cater to the needs of the convention that is coming in. We do not always use recycled paper products or corn-based plastic ware, but we do use them if asked by the convention planners. We just had the McDonalds franchise owners’ convention visit (our property) and they had specially requested recycled paper products only.” My supervisor also has told me that our environmental services department (the sanitation department) has a team that specifically goes through the garbage and sifts through what can be recycled and what can’t.”

What if any actions are you taking regarding the environment within your property?

“I’m not really up to date with what’s going on with the rest of the hotel property. But as far as I know I haven’t heard too much aside from the recycling project that the environmental services department is doing.”

What, in your opinion, is the driver behind these changes in policies?

“Well from what I know, I think the driver is money. These moves, while expensive at the time, are really long term cost savings. For example, the LEED certification that CityCenter is aiming for provides the builder with a tax rebate. So if anything, it’s a great way for the company to save money.”

What is the next step for your department and MGM Mirage?

“I’m not really sure honestly. I think you’ll see our department (convention catering), start to use recycled materials only and probably monitor our waste output a lot more.”

In-Person Examination

By sheer coincidence, the author was invited to attend a seminar at the Mandalay Bay Convention Center and continue the examination that was started with the previous interviews with Mandalay Bay executives. There were three parts to the seminar: a speech and question and answer session; a lunch; and, a cocktail reception. Upon entry to the convention center, the first thing observed were the use of compact fluorescent light bulbs (CFLs). CFLs are easily noticed as they are corkscrew shaped light bulbs. This was interesting as the interview with the convention director had indicated that all the light bulbs had been replaced by LED lighting. The CFLs were the only bulbs noticed, the

author did not see any LED lights in place. The question and answer section featured several large projection screens and heavy lighting as the speaker was a major celebrity. There was no indication of any environmental policies taking place.

There was a lunch that followed the speaker. Lunches were self assembly box lunches. The first course was a sandwich wrapped in paper which was then contained in a large plastic container. The side dishes were salads served in plastic containers. Corn based plastic ware was the only type of silverware offered. The drinks were bottles of soda served in paper cups. The cups were examined and there was no mention of them being recycled. Once assembled, the lunches were placed inside a folding cardboard lunch box. The cardboard was examined and there was no mention of the cardboard being recycled anywhere on it. There was a dining area where everyone congregated to eat the box lunches. The area featured two trash areas, neither of which had separated recycling areas. In fact, the trash cans were overflowing. Convention attendees began to leave their box lunches on top of the trashcans. The environmental services department put all the box lunches in a garbage bag and hauled them off. There were still bottles and cans sitting on top of the garbage can. Unfortunately, there was not a chance to talk to any of the sanitation workers.

Outside of Las Vegas

LVSH are some of the largest hotels in the nation and looked upon as leaders in their industry. However, there are hotels and hotel chains outside of Las Vegas that are making strides in their green policies and activities. Marriott has launched two programs. One is called “SERVE” (Shelter, Environment, Readiness for hotel careers, Vitality of children, and Embracing diversity and people with disabilities) and relates to the way employees conduct themselves and give back to the community (Dickover, 2007). “ECHO” (Environmental Conscience Hospitality Operations) is Marriott’s other program and is how they are looking into the construction and operations of new properties and how to make them green (Dickover, 2007).

Kimpton Hotels, a boutique hotel chain based in San Francisco, also has launched an environmental program called Kimpton Cares (Kimpton Hotels, 2007). Kimpton’s corporate website lists the following green policies:

Cleaning Supplies- All rooms cleaned with environmentally friendly cleaning products;

Soy Inks- All corporate collateral is printed on recycled paper using soy based ink;

Recycled Paper- Property wide printing on recycled paper;

Organic Beverages- All complimentary lobby coffee is organic, shade grown and/or fair trade;

Towel/Linen Reuse- Guests have the opportunity to do their part to reduce energy and detergents required for daily washings (note that this is a common practice in most LVSH, but it could not be found during the website content analysis);

Recycling- Back of house recycling programs addressing glass, bottles, paper, cardboard;

Water Conservation- Implementation and auditing of low flow systems for faucets, toilets, and showers;

In-room designer recycling bins- Guests are encouraged to participate in reducing the hotel's environmental impact; and,

Honor bar with organic food and beverage options- Honor bars include organic snacks and beverages (Kimpton Hotels, 2007).

There is one hotel that appears to have surpassed all other hotels and chains in explaining its green activities. The Gaia Napa Valley hotel in Napa Valley, California is the first Gold LEED Certified hotel in world (Bennett, 2007). The hotel's website has the hotel's environmental content and policies on almost every page. The website's home page advertises the hotel as Napa Valley's first fully environmentally-sustainable hotel. The home page also details how the hotel met Gold LEED standards through the following construction, building and operating methods:

Wood Based Materials- All lumber used for the hotel is FSC (Forest Stewardship Council). The Forest Stewardship Council (FSC) is an international network to promote responsible management of the world's forests;

Coatings, Adhesives and Sealants- Low volatile organic compounds (VOC) paints were used throughout the hotel. Both these strategies help improve the air quality within the hotel and have a positive effect on human health by improving the quality of air;

Carpet- Carpets contain post consumer recycled material in the backing, fiber and pad;

Construction Waste Management- The contractor implementing waste diversion practices as an integral part of their operations. They provided a recycling station for

paints. The contractor also provided a recycling station for cardboard. During construction, bins were placed on the property primarily for cardboard. All cardboard was recycled on the premises;

Bathrooms- All restrooms use recycled tiles and granite;

Water- The project achieved a water use reduction of about 40 percent. All toilets and showerheads are low flow;

Environmental Quality- Appropriately sized and efficient HVAC units are used throughout. These units are quieter and more efficient than standard HVAC systems and use a more environmentally friendly refrigerant than is standard. Aluminum exterior grates were used in all entrances of the property. This helps to minimize dust and particulates entering the building, which improves air quality;

Energy/Solatube- All windows used are efficient, low energy transmittable and reduce glare. Solatube Tubular skylights are used throughout the hotel including in the conference rooms, lobby and the hallways. These skylights magnify the sun's rays to deliver abundant light into the property interior spaces during the day;

Recycling- Recycling bins are located in rooms and around property. Newspapers are not delivered to each occupied room;

Chemical free landscaping- All of the fertilizers used for landscaping are all natural and chemical free;

Native and climate- adaptive plants were used so water use for irrigating is very limited;

Promoting Awareness of Sustainability- Kiosks with “green touch screens” show guests and visitors how much the hotel is saving in water, electricity and how much CO2 the hotel is emitting; and,

Solar panel- Solar panels provides 12 percent of the hotel's electricity. Cool reflective roof reflect heat, which saves money in cooling costs (Gaia Napa Valley, 2007).

Wen Chang, creator and executive director of the Gaia Napa Valley, believes that the hotel will serve as the prototype for hotels going forward and believe that others can use the model that he has used to create the Gaia Napa Valley (Das, 2007). Chang believes that the education program that the property offers its most important area. According to Chang, "We believe in educated our staff first and educating our customer next. The staff will teach the customer(s) to focus on green living. What most people don't understand is that we are offering a luxurious experience and not a bare-bones hotel room." Chang estimates that the one hundred thirty-two room property saves between fifty and seventy-five thousand dollars per year in energy and water costs alone. He believes those costs savings will contribute to help payback the original cost of the hotel in eight years.

The website content analysis from table two was revisited and the websites of the smaller hotels, the Kimpton Hotel chain, and the Gaia Napa Valley, were examined. The same analysis was conducted as before, only this time, the Kimpton Hotel chain and the Gaia Napa Valley were examined and then compared to the LVSH. As previously mentioned, the four sections examined were the home page (or main introduction page); the menu bar, which lists all sections of the website; the news section, which provides detail of all the latest news related to the property; and, the 'about us' or 'about the company' section, which provides the vision statement, philosophy, methods, and beliefs of the company. Once again, the content analysis of the website looked for the following seven key terms: Green, Sustainable, Green Consumer, LEED, Environment,

Environmental, and Recycling. The results of the environmental content of the smaller hotels were then compared to the LVSH from before.

Table four takes another look at the LVSH websites and compares it to those of the Kimpton Hotel and the Gaia Napa Valley.

TABLE 4

HOTEL	WEBSITE CONTENT			
	HOME PAGE	MENU BAR	NEWS	ABOUT US
Ballys	No	No	No	No
Bellagio	No	No	No	No
Caesars Palace	No	No	No	No
Circus Circus	No	No	No	No
City Center Project	No	No	Yes, 7 articles	No
Cosmopolitan	No	No	No	No
Echelon Place	No	No	No	No
Excalibur	No	No	No	No
Flamingo	No	No	No	No
Harrahs	No	No	No	No
Imperial Palace	No	No	No	No
Luxor	No	No	No	No
Mandalay Bay*	No	No	No	No
MGM Grand	No	No	No	No
Mirage	No	No	No	No
Monte Carlo	No	No	No	No
New York New York	No	No	No	No
Palazzo	No	No	No	No
Paris	No	No	No	No
Planet Hollywood	No	No	No	No
Riviera	No	No	No	No
Sahara	No	No	No	No
Stratosphere	No	No	No	No
The Venetian	No	No	No	No
Treasure Island	No	No	No	No
Tropicana	No	No	No	No
Wynn	No	No	No	No
Wynn-Encore	No	No	No	No
Gaia Napa Valley	Yes	Yes	Yes	Yes
Kimpton Hotels	No	Yes	Yes	Yes

If such small properties and chains can post their environmental activities and content on their website, it begs the question as to why the large LVSH are not putting green related information on their website. These smaller properties operate on much

smaller budgets, face tighter financial constraints, and have lower occupancy rates than those of a large LVSH. The Gaia Napa Valley only has one hundred and thirty-two rooms which is nearly one-twentieth of the average LVSH. It seems odd that a small hotel property can have so much environmental content compared to such a large hotel.

Conclusion

This study examined the environmental content and policies of twenty-three major LVSH properties, five upcoming projects, and one hotel expansion project. The objective of the study was to determine how prevalent and important protecting the environment is to these LVSH properties and where they currently stand on the issue. The research indicates that LVSH has just begun the initial stages of considering the environmental impact of its rapidly expanding horizon. It appears that only one company on the Strip, MGM Mirage, has begun to consider and evaluate their actions and policies and have released limited outside information on their attempts to go “green”.

The research conducted seems to indicate that the drivers behind adapting new environmental policies have still yet to be identified. There was no indication given that customers were demanding the changes. Over the next few years, visitors to Las Vegas will become more educated about the environment and may make their decision to stay at a property based on their environmental policies. The responses from the interviews conducted indicated that executives are adapting green policies for the sake of the community. Thus, the question can be raised is it for the benefit of the community or the benefit of the shareholders? However, a definitive answer to this question was beyond the scope of this study.

There are many financial benefits from adapting green policies and actions which tie in with Alfred Chandler's Strategic Management Theory and Milton Friedman's theory of maximizing shareholder wealth. Local governments in accordance with LEED certification have offered tax credits to companies that construct green projects. The actions of adapting and changing environmental policies can initially be expensive, (such as the example of Mandalay Bay replacing their light bulbs with LED bulbs), but ultimately they can save the corporation money over time. Those savings will lead to higher profit margins; thus, they will provide the shareholders with greater returns.

The marketing of changes in environmental policies or projects, such as CityCenter, poses an interesting challenge for executives. While the literature has indicated that the number of green consumers is expanding, there is no indication that the number of eco-travelers or green travelers is expanding, especially as it relates to Las Vegas. It was mentioned in the interviews that companies, such as MGM Mirage want to make sure "...all their ducks are in a row", or all the bases are covered, before they go forward with announcing their changes in the environmental policies to avoid public scrutiny. The scrutiny may be unavoidable as the corporation's motivations for going green may come into question. Some travel experts believe that it will be very difficult to scrutinize these hotels, as there are many different certifications including third party, government, and proprietary labels are used (Bennett, 2007). One issue involving CityCenter has already come to the forefront. There is a loophole in the LEED Certification that allows guests to smoke as long as the casino is ventilated. Las Vegas will face many more of these issues as a place forever known as "Sin City" will have a difficult time becoming an eco-tourism hot spot.

In summary, it appears that Las Vegas has a long way to go as far as getting on board with environmental actions and policies. There seems to be a lot of talk about doing something, but very little documentation and action exists, based on the results of this study. As demonstrated by the website and annual report content analysis, there is very little documentation available from the market. Furthermore, the hotel corporations themselves need to go forward and the CityCenter Project will be an interesting litmus test. It begs the question as to why LVSH are behind, and why the LVSH are slow to adapting new green policies? One answer may be that the customers may not be demanding it, and the hotels may not be properly marketing it or making changes that the customer cares about (Rex & Baumann, 2007). Thus, whether Las Vegas will become an eco-tourism hot spot attractive to tourists remains to be seen.

Limitations

LVSH with over two thousand rooms were the only hotels observed in this study, and are not representative of the city of Las Vegas or the rest of the country. Only twenty-eight properties were observed, five of which have yet to open their doors. The findings of this study cannot be generalized to either the hotel industry or the casino industry as a whole. There was no scientific method used to conduct the interviews with the executives. The interviews were conversational in nature rather than using a structured scientific questionnaire.

Implications and Future Research

An important implication of this study is to encourage further research into the topic of “greening” the Las Vegas Strip. It will be interesting to see how these next two years of heavy construction pan out for Las Vegas. A similar content analysis study could be done one year from now or even repeating itself on a yearly basis, as these major projects are completed and placed in service. Also, other hotel chains and individual hotels may increase their efforts outside of Las Vegas and could serve as a barometer of where Las Vegas stands. The study could be replicated to compare boutique hotels versus large hotels, or major hotel chains versus individually owned properties. Eventually this study could be replicated in a different environment. Casino industry driven cities such as Atlantic City and Macau could be observed. Hotel industry driven cities such as New York, Los Angeles, and Miami could be observed.

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