



# THE IMPORTANCE OF ENVIRONMENTAL SUSTAINABILITY IN THE HOTEL SECTOR



# Survey Identity

|                               |   |
|-------------------------------|---|
| <b>SURVEY TITLE</b>           | <b>The Importance of Environmental Sustainability in the Hotel Industry</b> |
| <b>ASSIGNING BODY</b>         | Hellenic Chamber of Hotels (HCH) - Google                                   |
| <b>CONDUCTING BODY</b>        | Research Institute for Tourism (RIT)  |
| <b>REFERENCE PERIOD</b>       | 2022  |
| <b>SURVEY TIME PERIOD</b>     | 1 – 25 March 2022   |
| <b>DELIVERABLE DATE</b>       | 31 March 2022   |
| <b>POPULATION</b>             | Greek Hotels  |
| <b>STATISTICAL UNIT</b>       | Hotel Unit  |
| <b>REGISTRY</b>               | HCH Registry  |
| <b>CLASSIFICATIONS</b>        | NACE, Hotel Categories  |
| <b>SAMPLING METHOD</b>        | Stratified proportional sampling  |
| <b>WEIGHTING</b>              | Triple (Category, Region, Size)   |
| <b>SAMPLE/POPULATION SIZE</b> | n=705 / N=10.098  |
| <b>COLLECTION METHOD</b>      | CAWI  |

# MAIN FEATURES OF THE GREEK HOTEL CAPACITY

2021

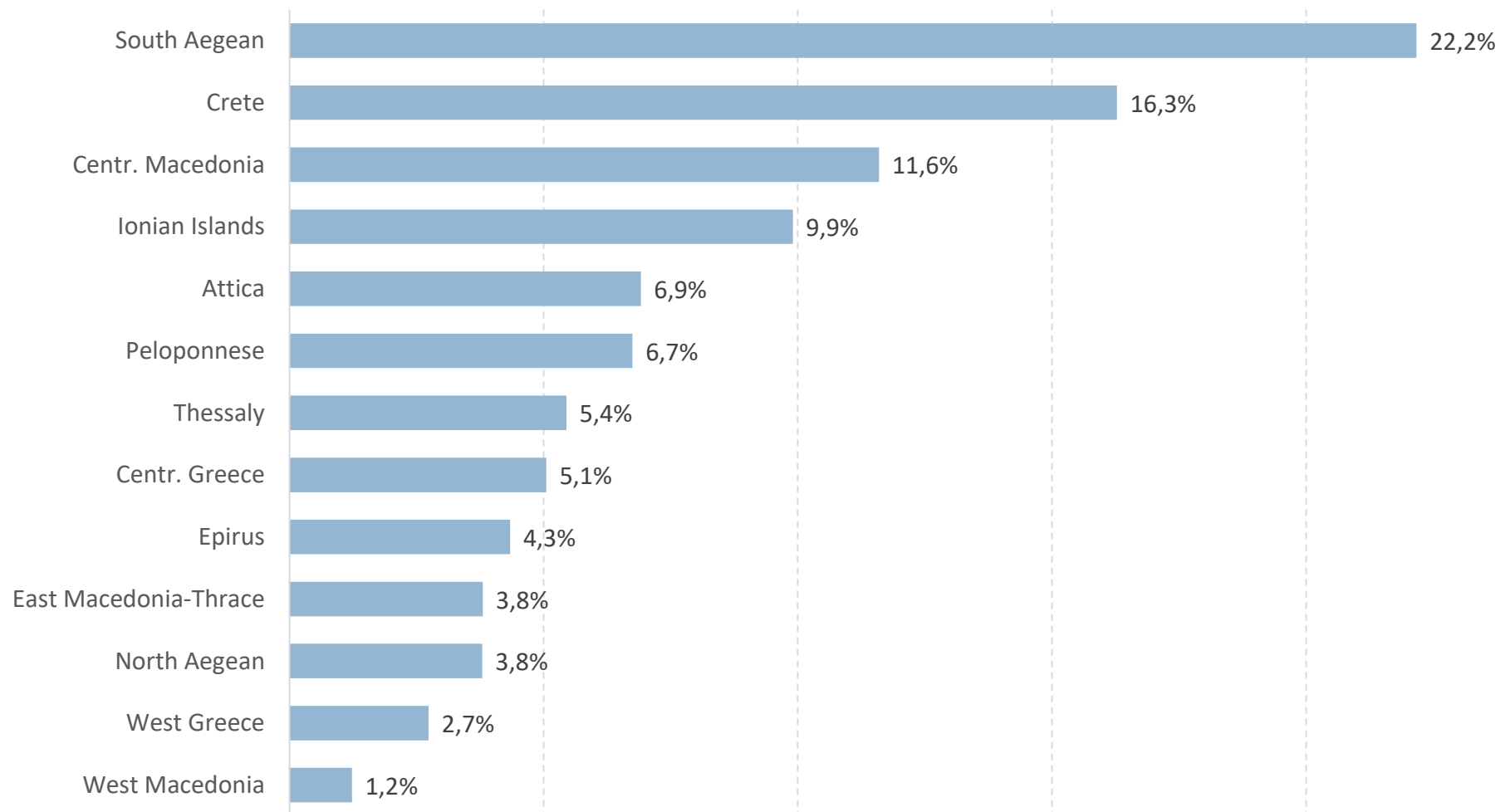


# The Greek Hotel Capacity, 2021

| 2021  | 5*      | 4*      | 3*      | 2*      | 1*     | Total   |
|-------|---------|---------|---------|---------|--------|---------|
| Units | 700     | 1.767   | 2.838   | 3.519   | 1.274  | 10.098  |
| Rooms | 97.342  | 124.955 | 102.357 | 92.524  | 24.358 | 441.536 |
| Beds  | 203.959 | 250.566 | 200.386 | 175.515 | 48.829 | 879.255 |

# The Greek Hotel Capacity, 2021

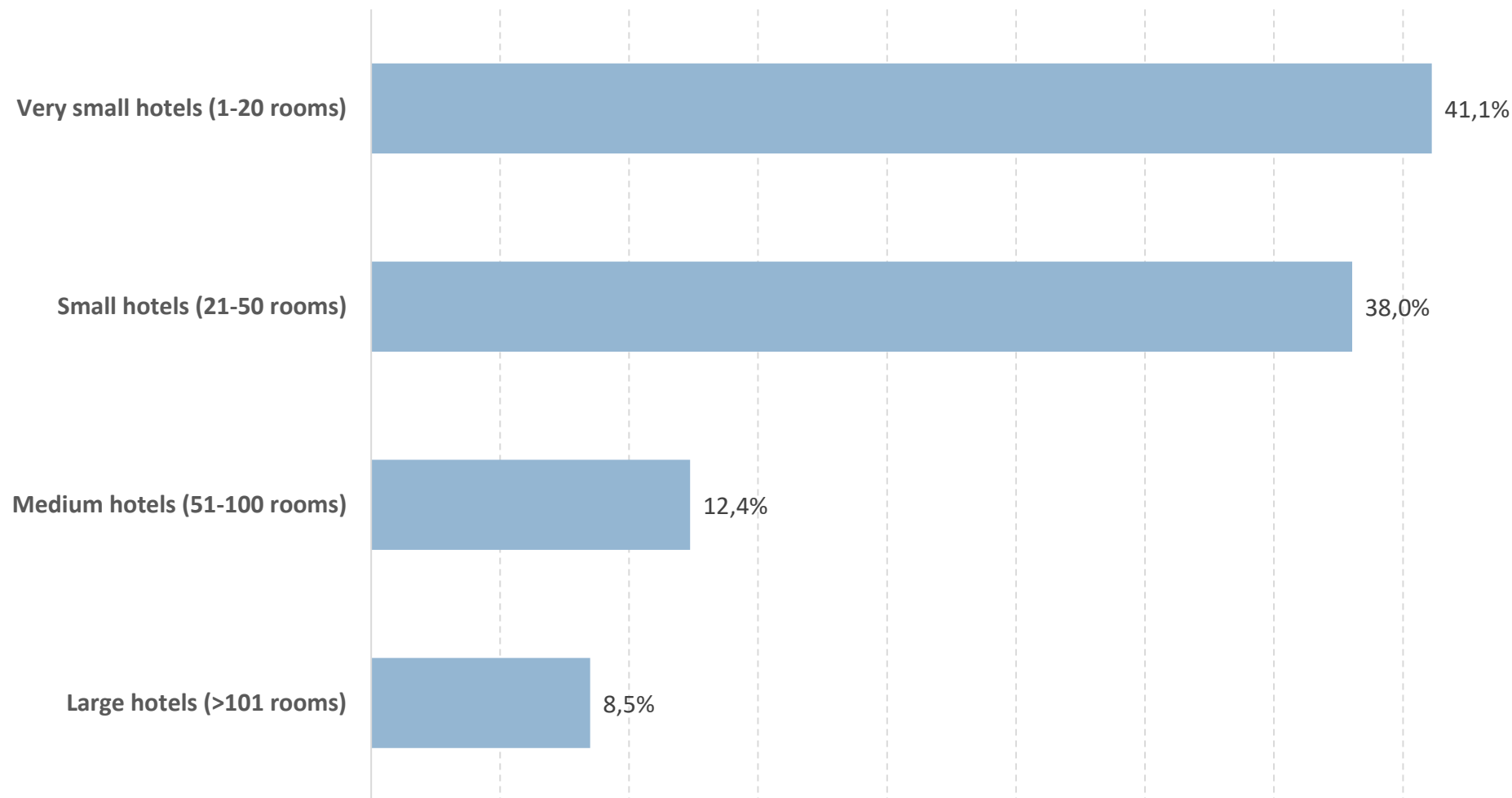
## *Regional Distribution*



**52%**  
of hotels is located in  
the island regions

# The Greek Hotel Capacity, 2021

## *Distribution by Size*

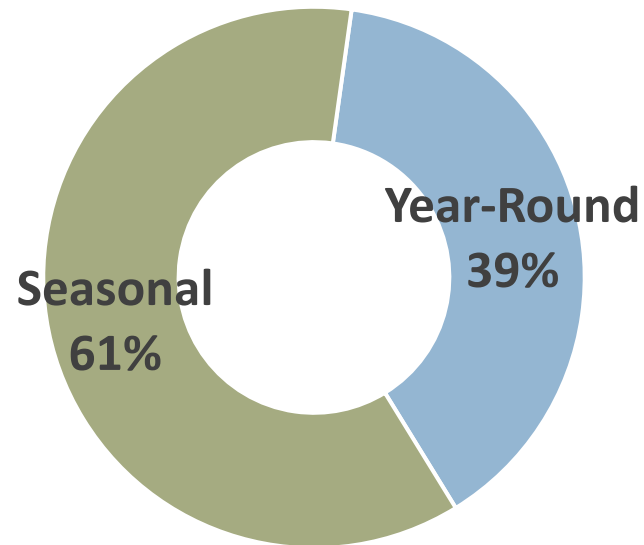


**79%**  
of hotels has a size of  
up to 50 rooms

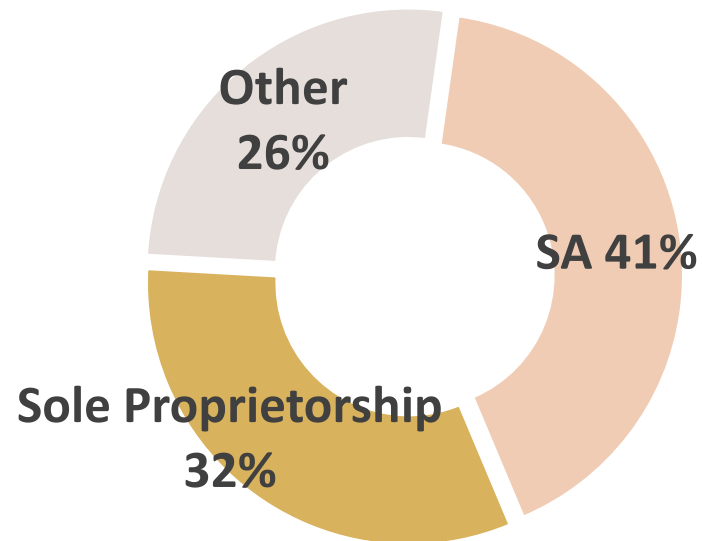
# The Greek Hotel Capacity, 2021

*Distribution by Operating Period, Company Type, Chain Integration*

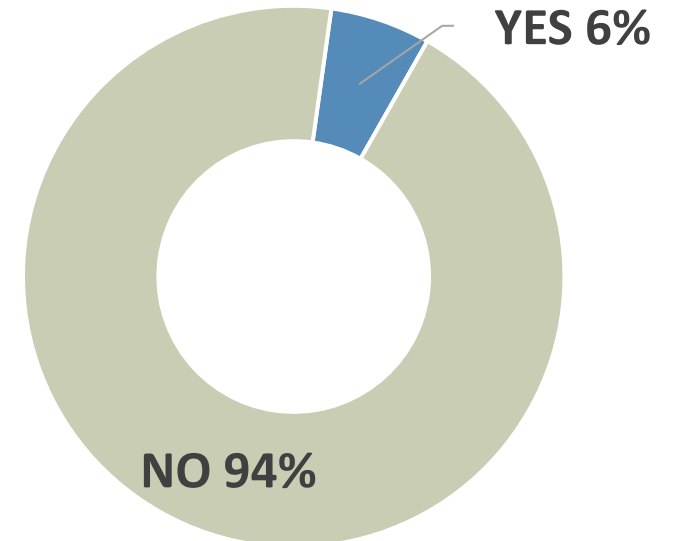
**Hotel Operation**



**Hotel Company Type**



**Chain or not**





# Environmental Sustainability in Hotel Sector: Key Findings

- The ratio of hoteliers acknowledging the importance of implementing sustainability practices for the future of their hotels ranges from 67% to 89%. Certified hotels, large and medium hotels are the top three scorers, while hoteliers in less popular islands and those owning a personal company are at the bottom of the scale.
- On average, more than half of the hoteliers admit that their knowledge level regarding environment sustainability issues is moderate. Only hoteliers of large hotels, of hotels members of a chain and of certified hotels state that they are well informed on sustainability issues.
- Nevertheless, particularly high ratio of hoteliers exhibit strong interest in being further informed on sustainability practices that can be implemented on their hotels.
- The ratio of hotels monitoring the CO<sub>2</sub> emissions ranges from 8% to 31%. Hotels members of a chain and certified hotels are the top scorers and on the opposite side are hotels located in cities other than the two main cities of Greece and in less popular islands.
- Hotels that implement in great extent practices for CO<sub>2</sub> emissions reduction, set lower reduction goals for the future.
- Total annual investments in environment protection practices account 8% to 11% of the hotel turnover.







# Hotel Sustainability Awareness

## ... in a glance

**3 out of 4**

hotel owners  
consider the  
adoption of  
sustainability  
practices as key  
to the future of  
their business

**1**

**79%**

of hoteliers  
express interest  
in acquiring  
sustainability  
certification

**2**

Only  
**41%**

of respondents  
consider their  
level of  
knowledge about  
sustainability  
practices to be  
satisfactory

**3**

# *Environmental Sustainability in the Hotel Industry*

*Analysis based on LOCATION*

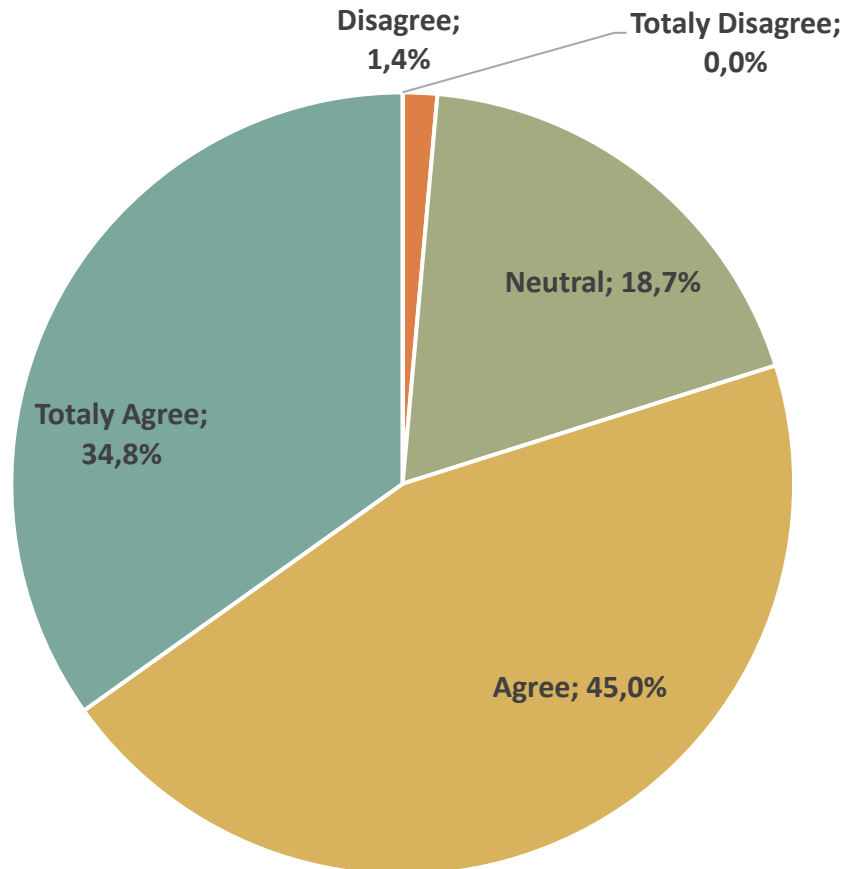


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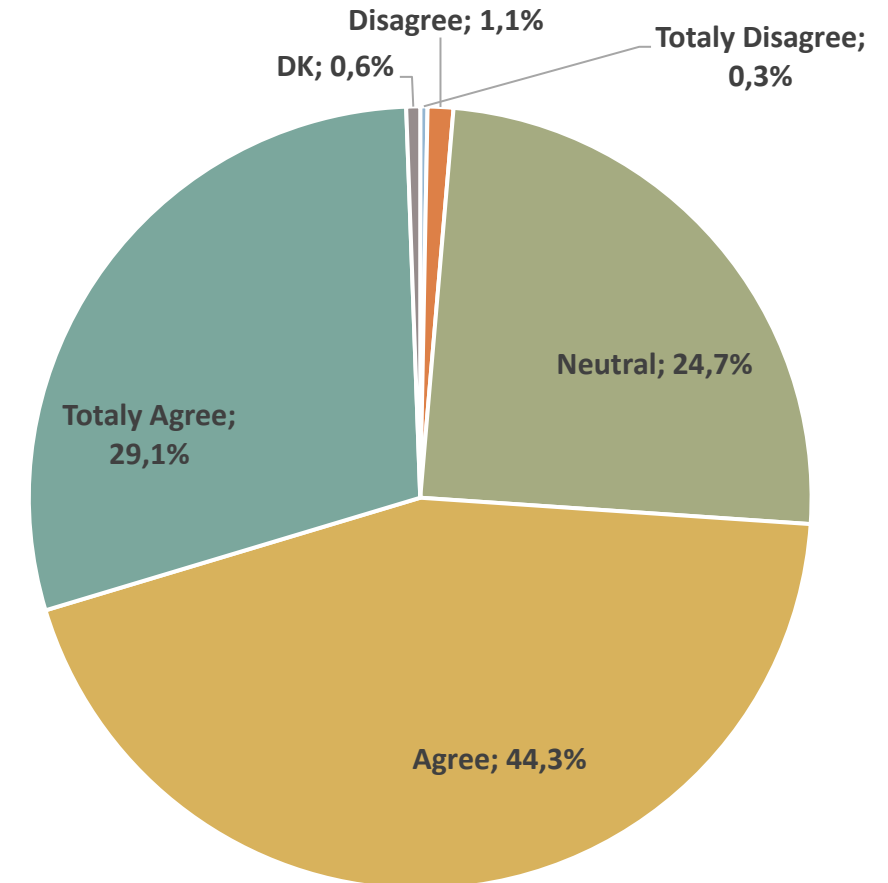
# Mainland

"The adoption of sustainability practices is critical for the future of my hotel business"

## Big Cities



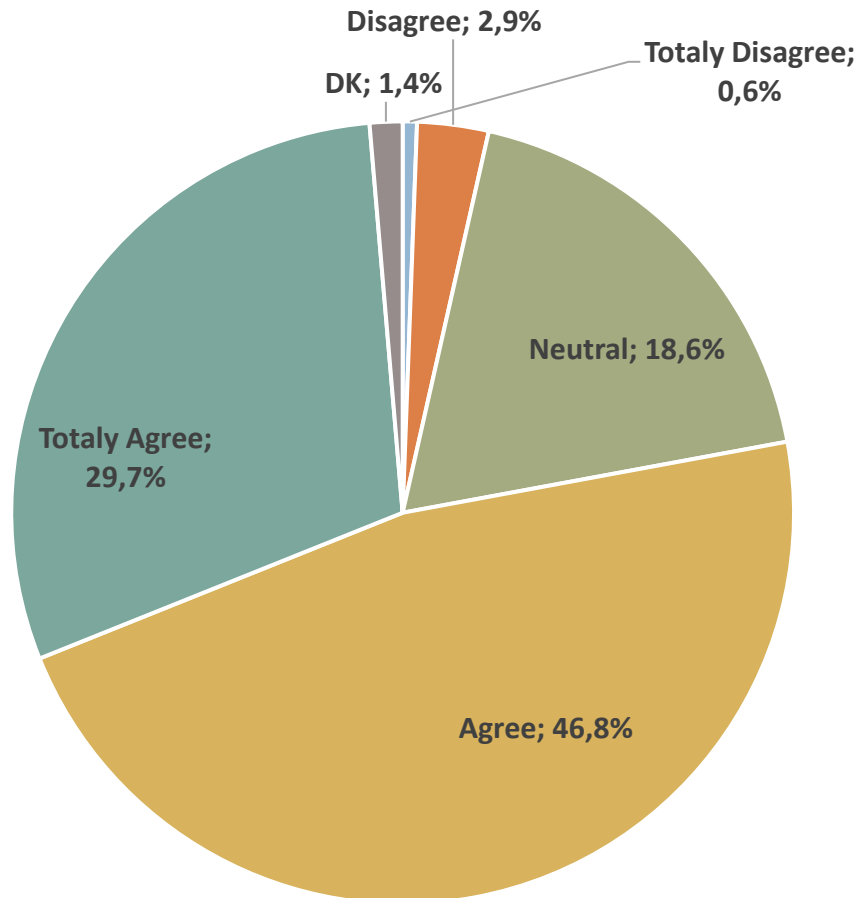
## Other Mainland Cities



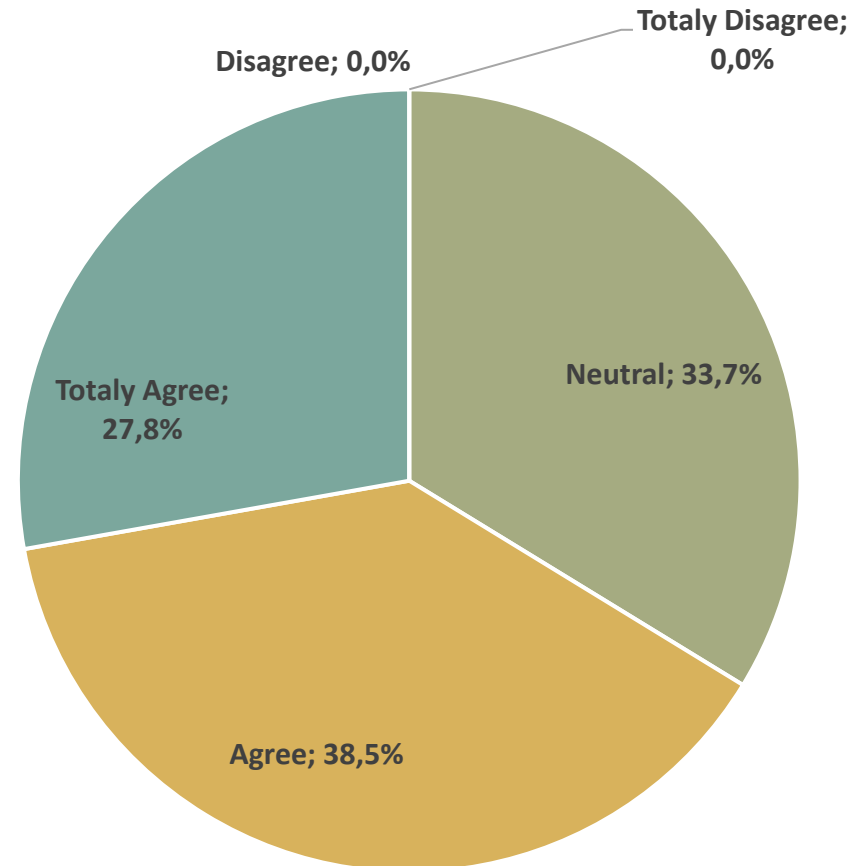
# Islands

"The adoption of sustainability practices is critical for the future of my hotel business"

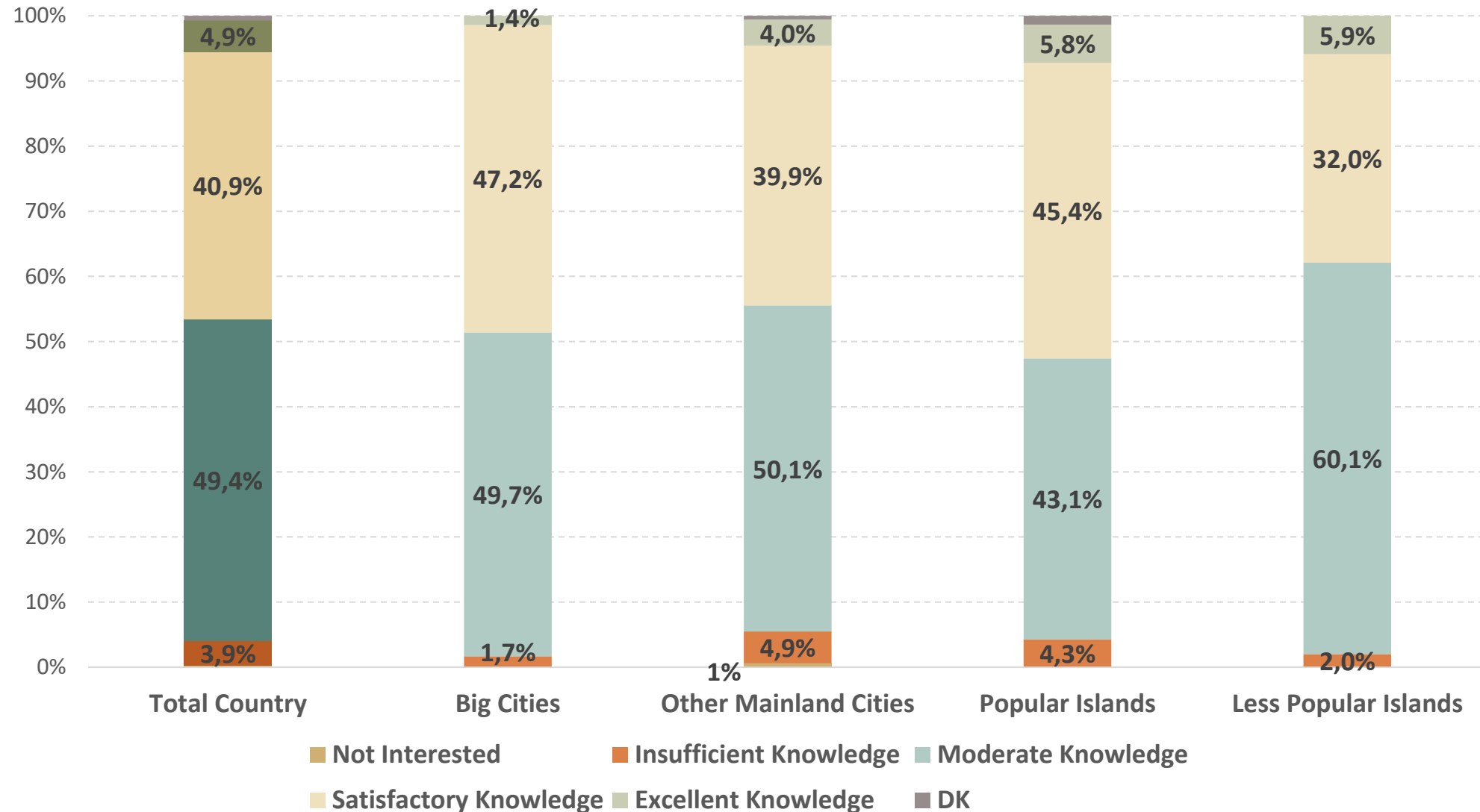
## Popular Islands



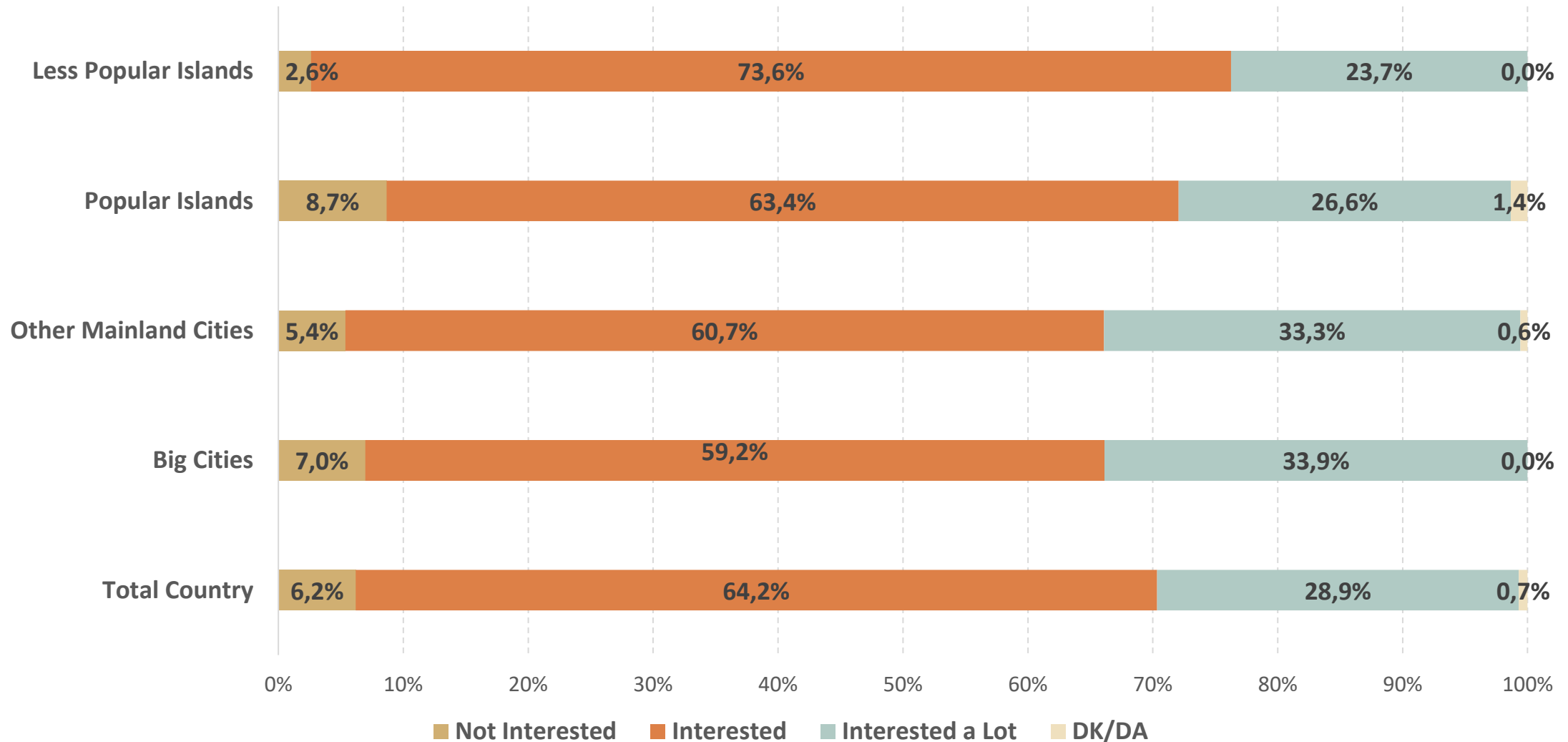
## Less Popular Islands



# Ratio of Respondents on self-assessment regarding the knowledge level on issues of environmental sustainability



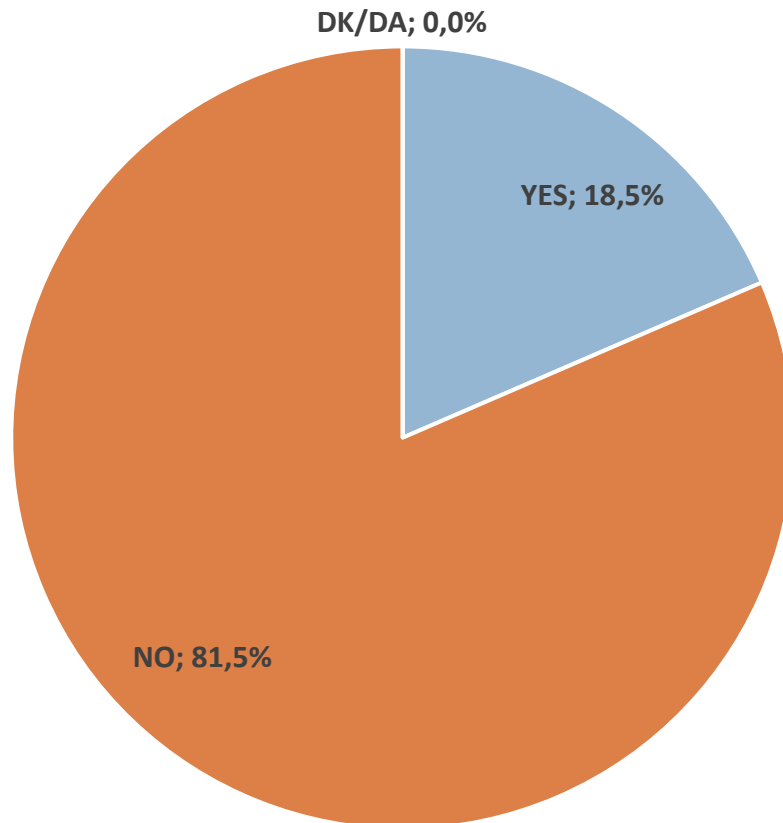
# Interest for further information on sustainable practices that can be applied/are applied in the hotel industry



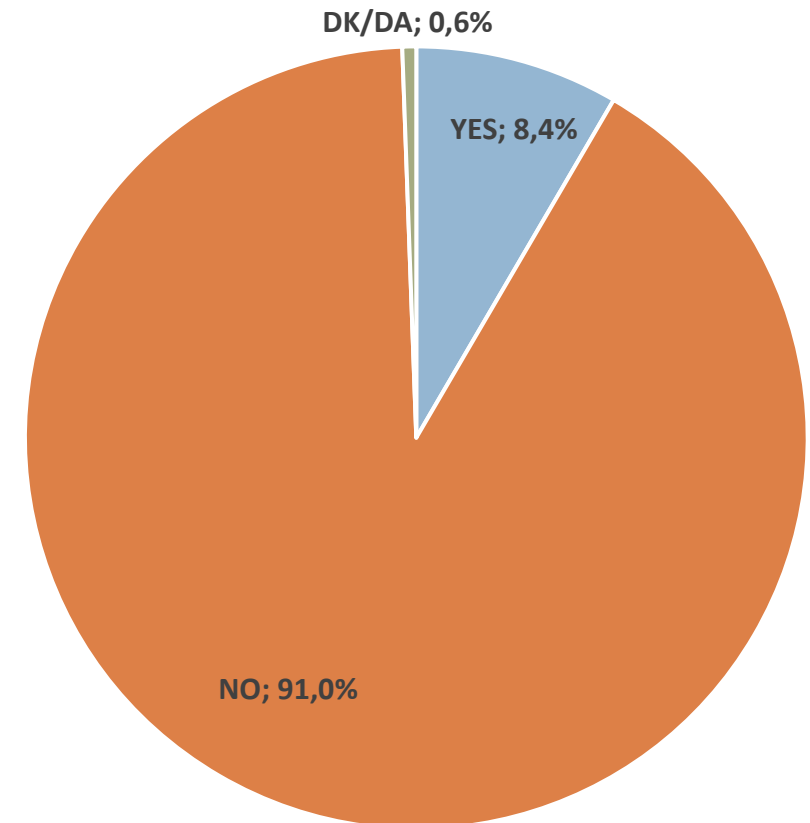
# Mainland

Application of methods for measuring the carbon footprint of hotel,  
i.e., the total amount of CO<sub>2</sub> and other greenhouse gas emissions  
caused directly and indirectly by the operation of the hotel

## Big Cities



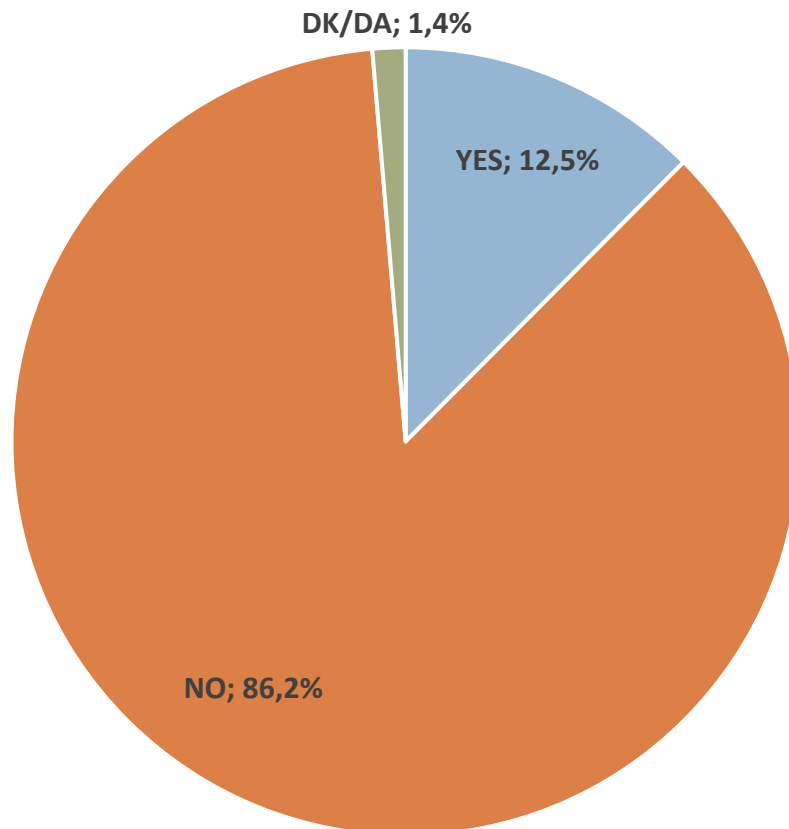
## Other Mainland Cities



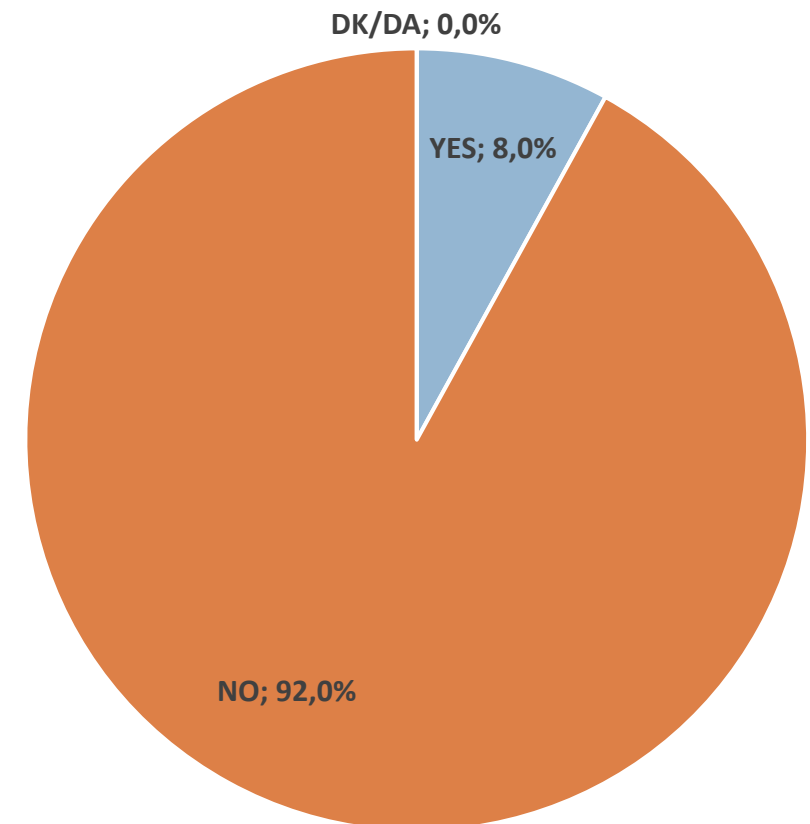
# Islands

Application of methods for measuring the carbon footprint of hotel, i.e., the total amount of CO<sub>2</sub> and other greenhouse gas emissions caused directly and indirectly by the operation of the hotel

Popular Islands



Less Popular Islands

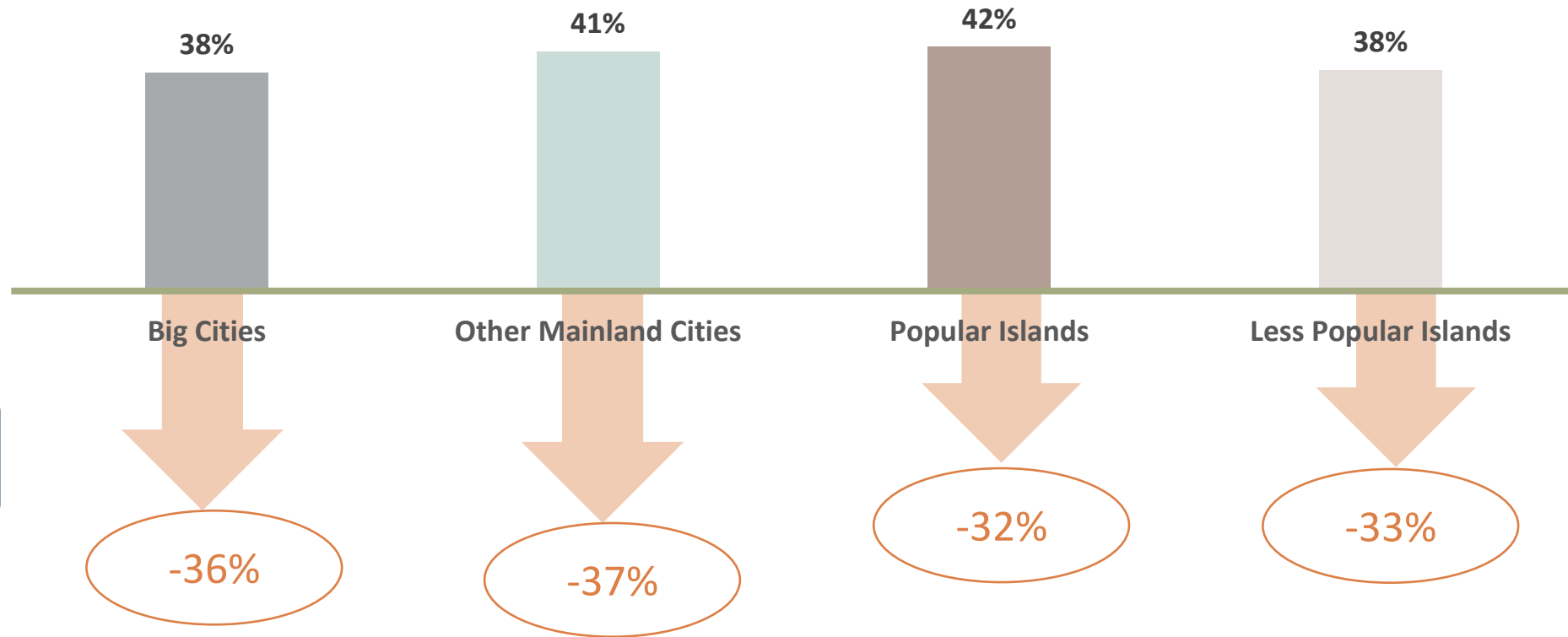




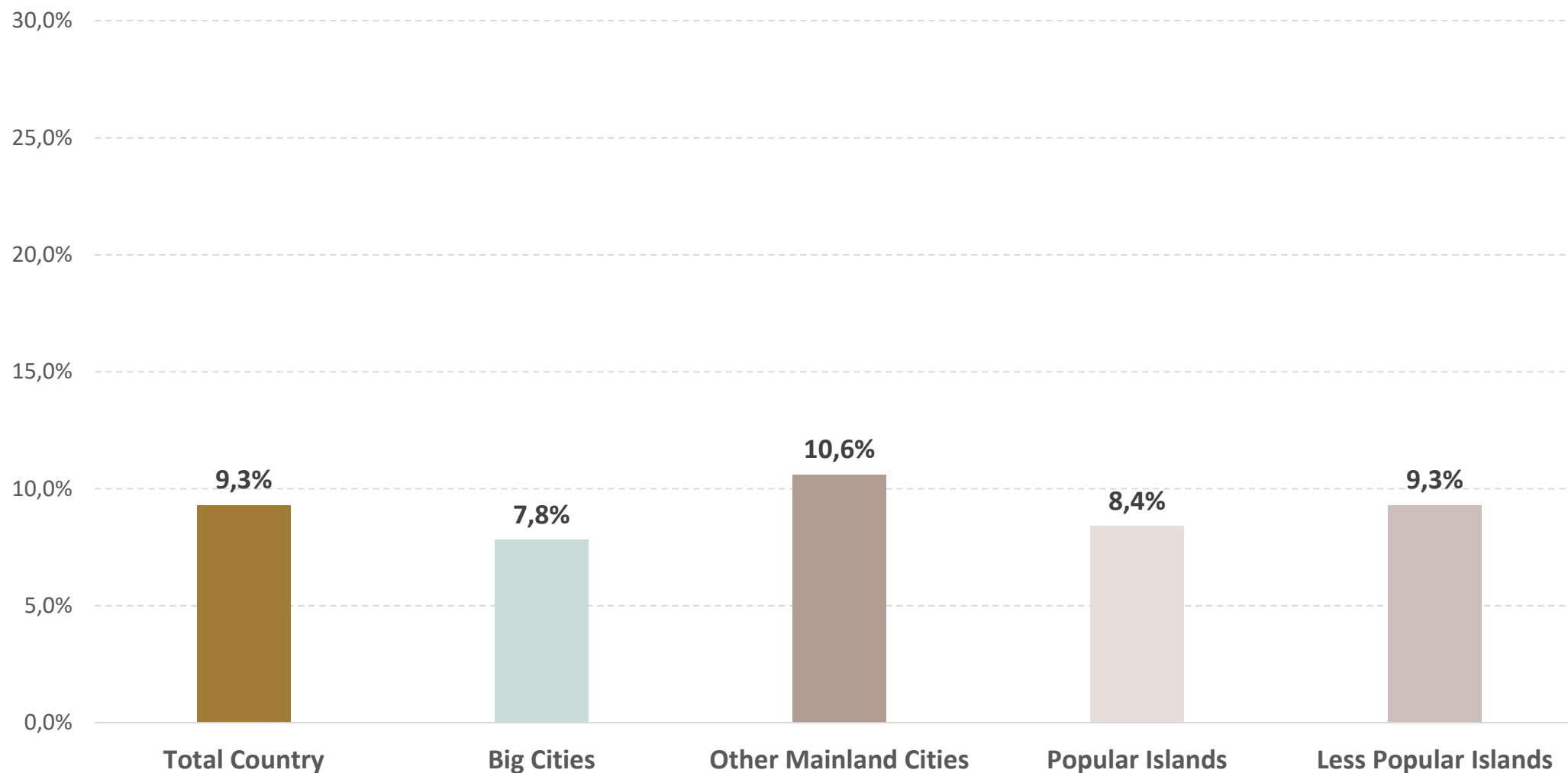
# Minimization of carbon dioxide emissions and reduction goals of respondents

% Hoteliers

Reduction  
Goal



# Total annual investments in environment protection practices as a percentage of annual turnover

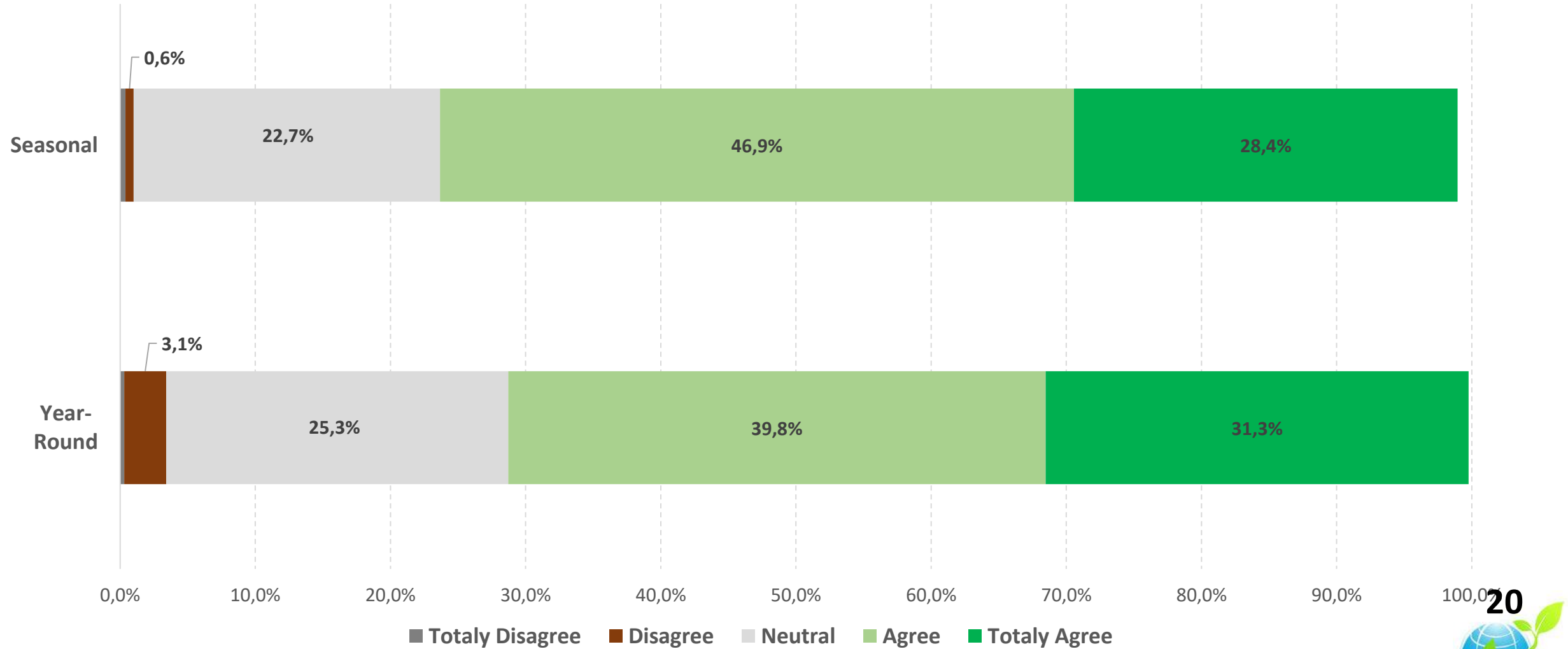


## *Environmental Sustainability in the Hotel Industry*

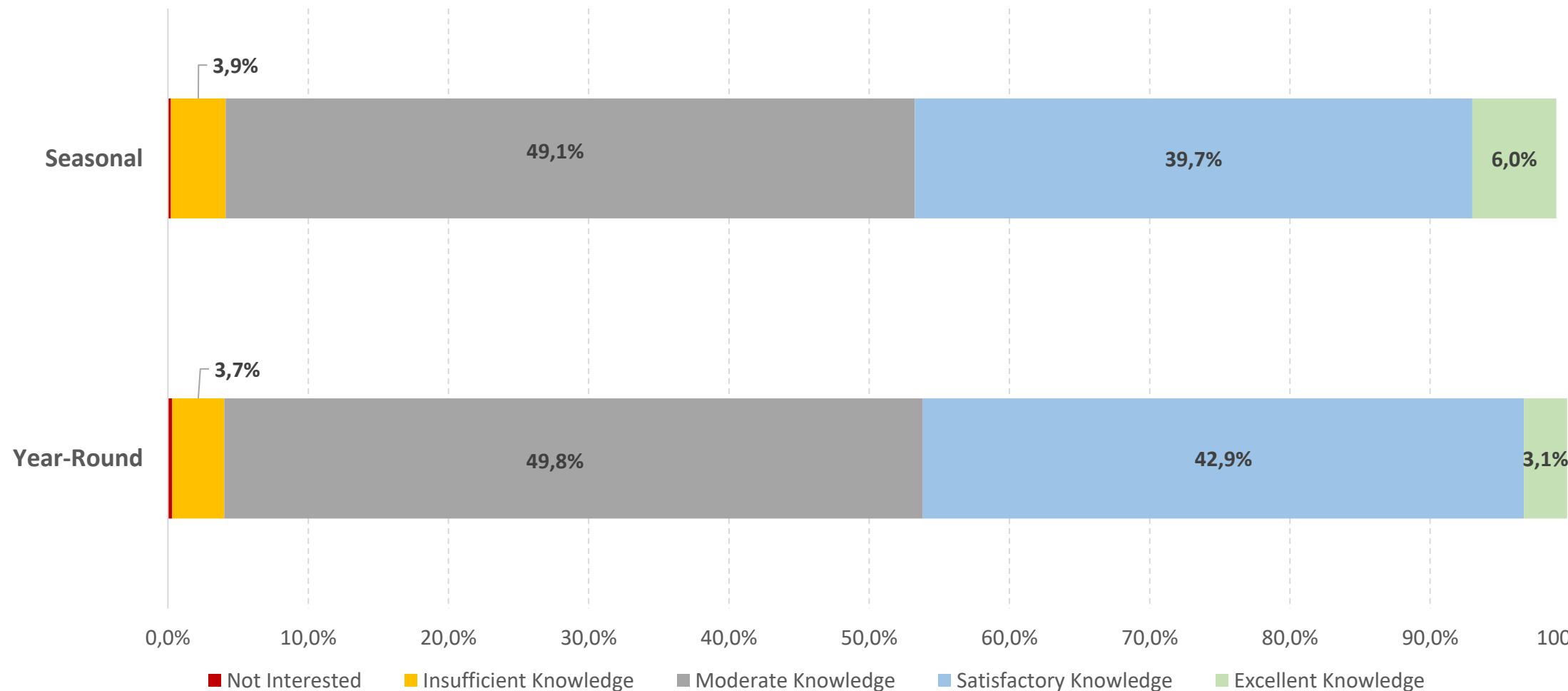
*Analysis based on OPERATION PERIOD*



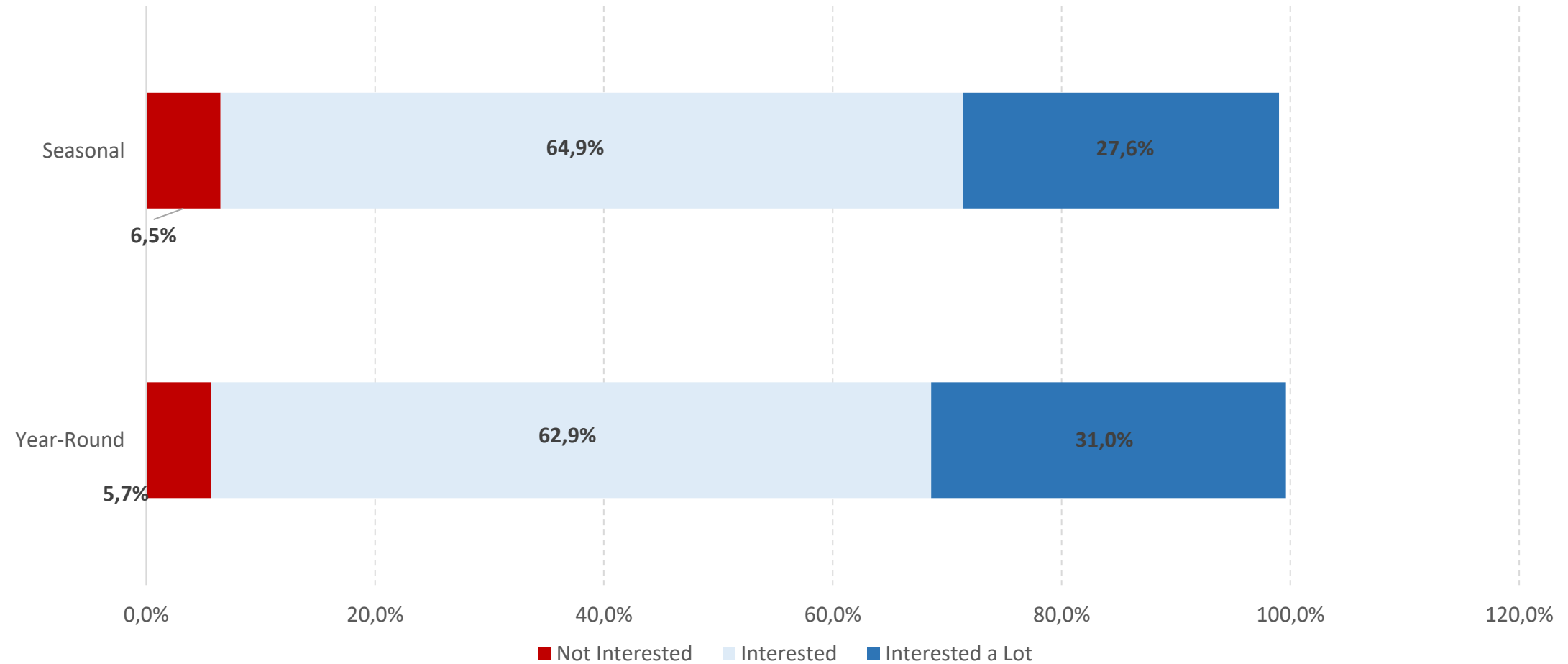
"The adoption of sustainability practices is critical for the future of my hotel business"



# Ratio of Respondents on self-assessment regarding the knowledge level on issues of environmental sustainability

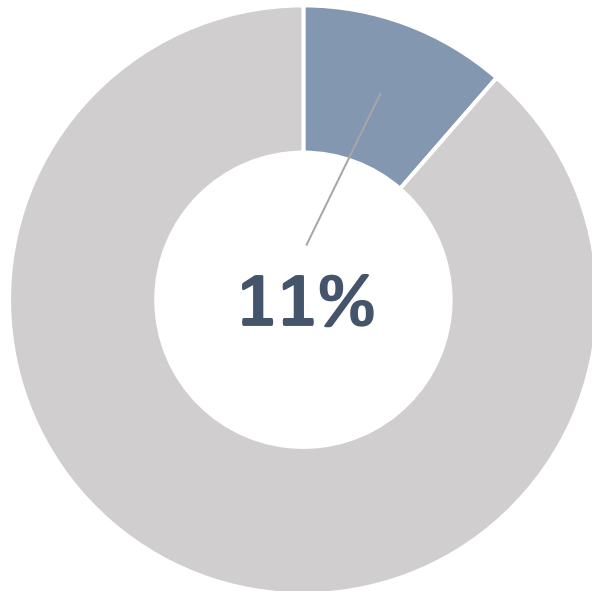


# Interest for further information on sustainable practices that can be applied/are applied in the hotel industry

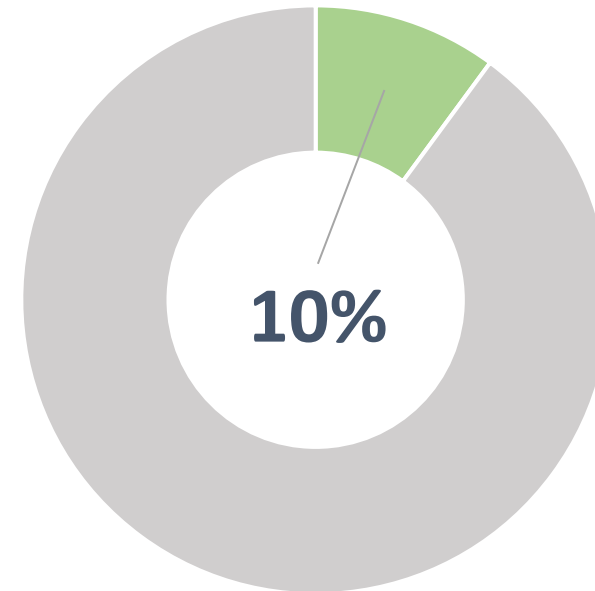


Application of methods for measuring the carbon footprint of hotel  
i.e., the total amount of CO<sub>2</sub> and other greenhouse gas emissions  
caused directly and indirectly by the operation of the hotel

Year-Round  
Operating Hotels

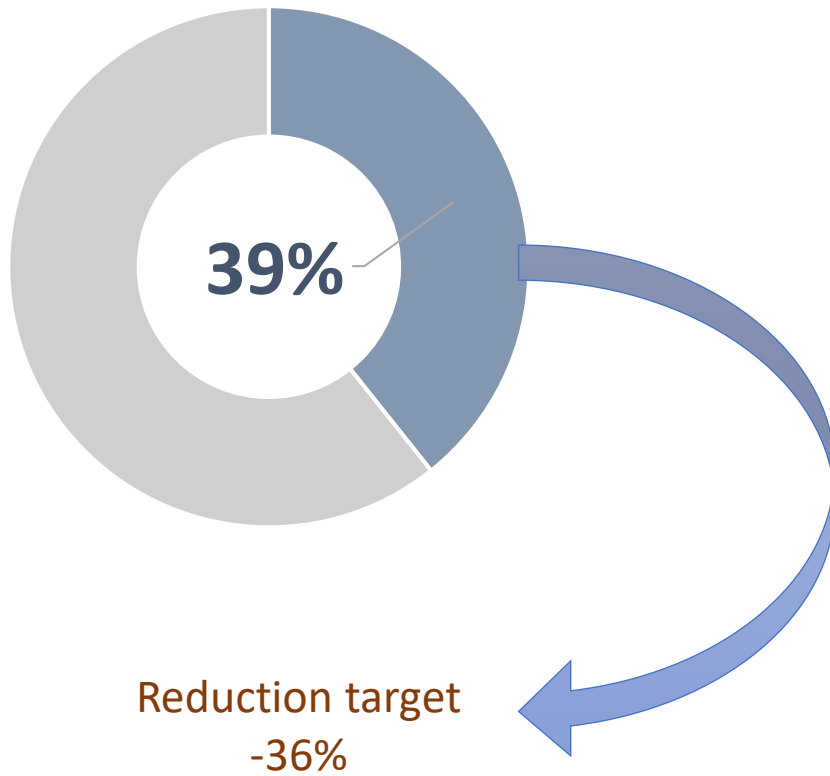


Seasonally  
Operating Hotels

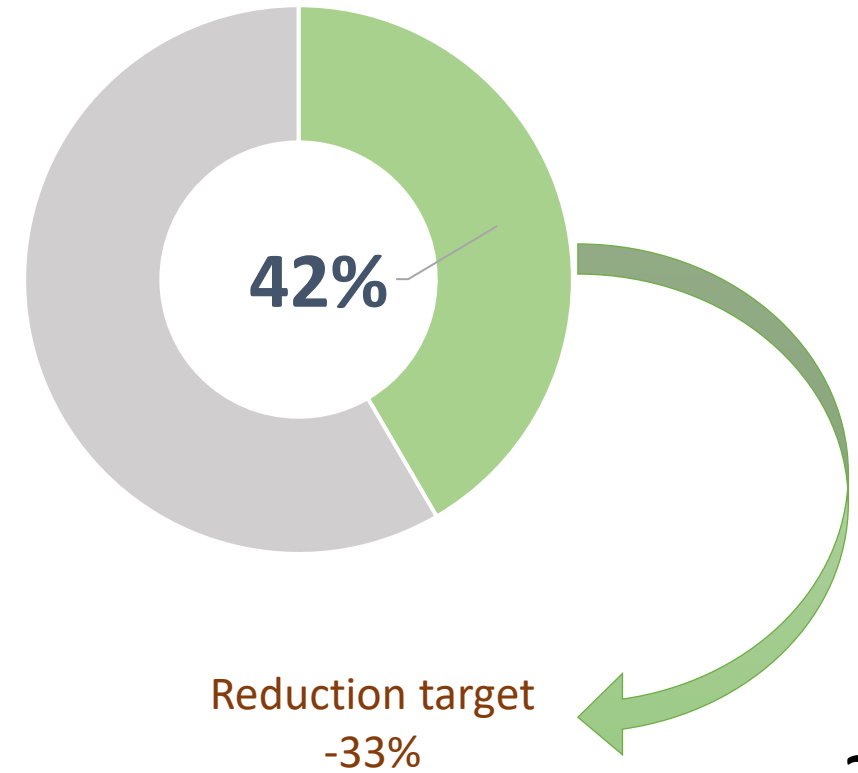


## Minimization of carbon dioxide emissions and reduction goals of respondents

Year-Round  
Operating Hotels

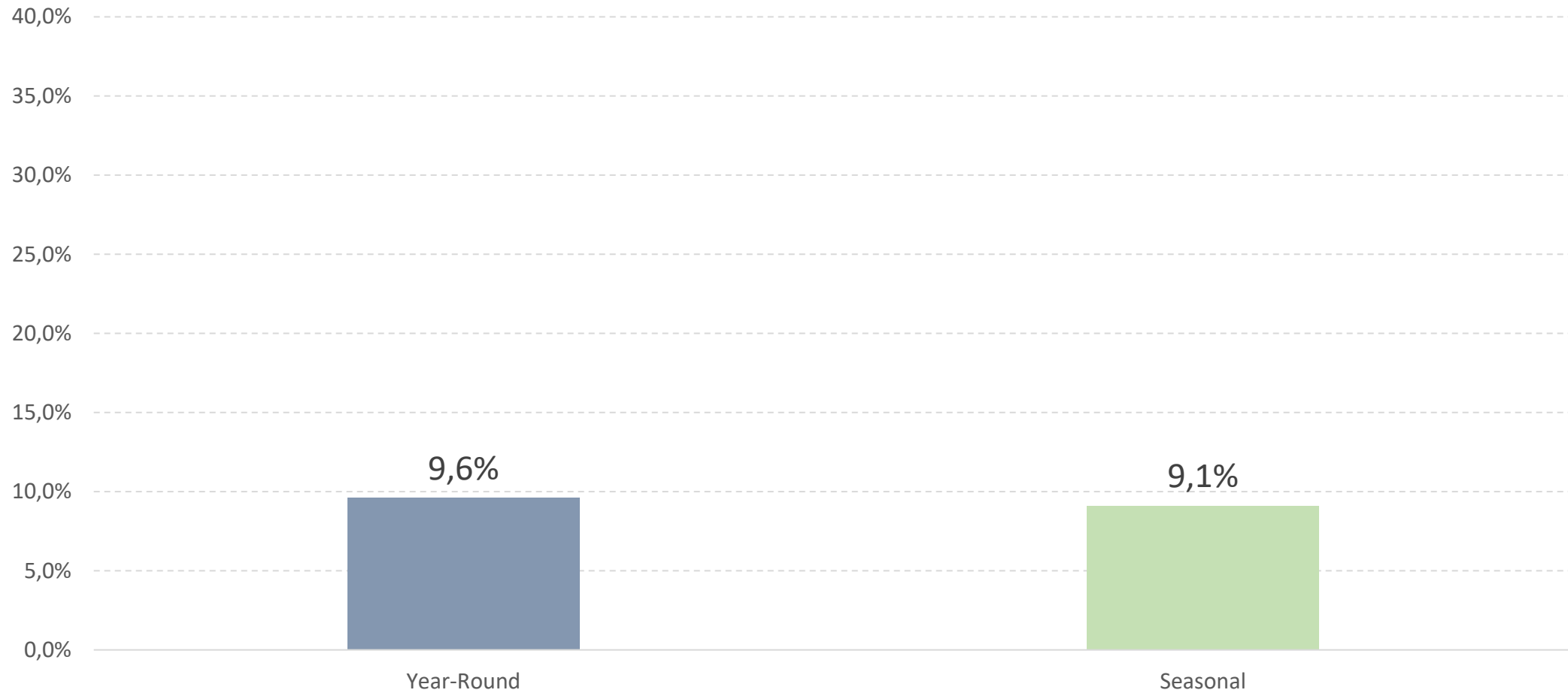


Seasonally  
Operating Hotels





# Total annual investments in environmental protection practices as a percentage of annual turnover



# *Environmental Sustainability in the Hotel Industry*

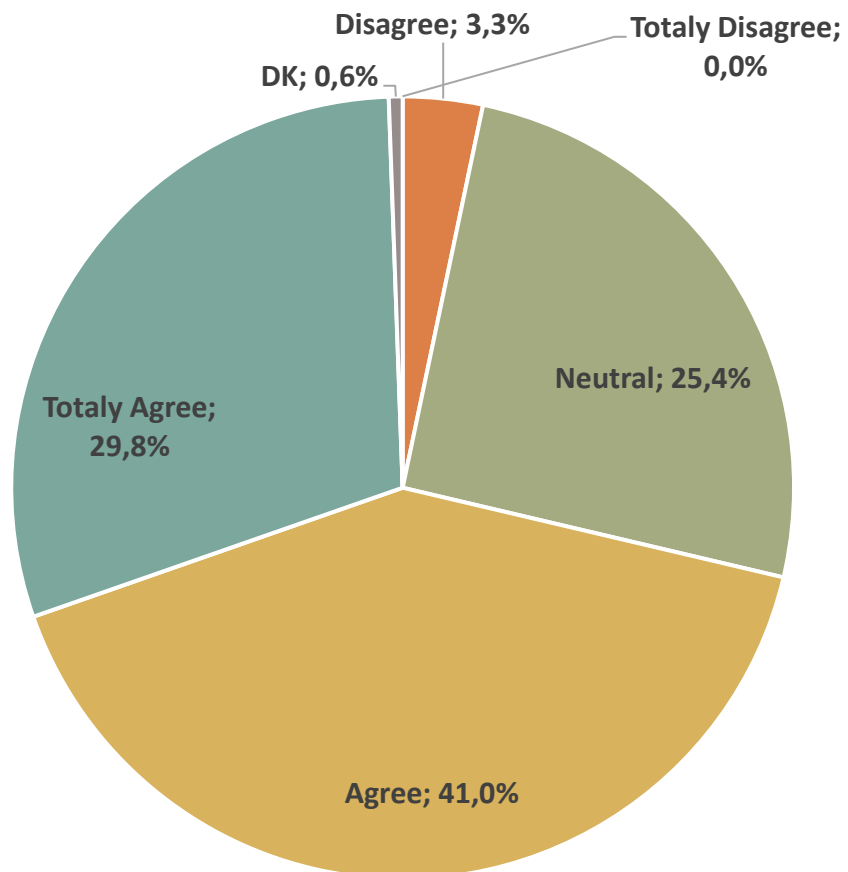
## *Analysis based on HOTEL SIZE*



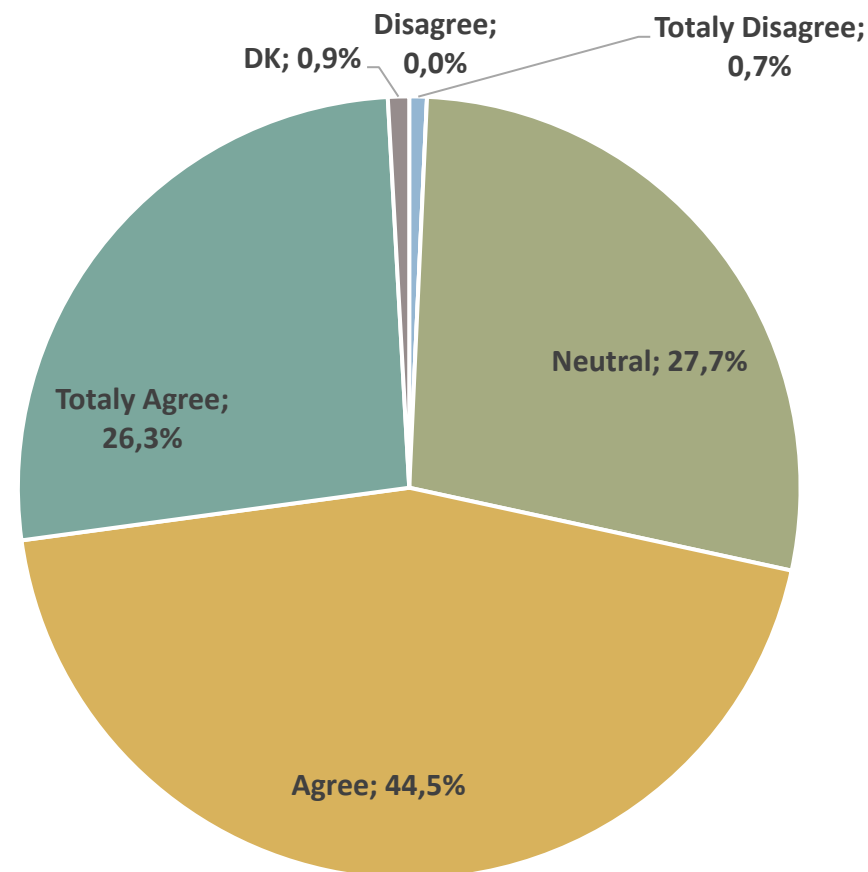
26

# "The adoption of sustainability practices is critical for the future of my hotel business"(1)

**Family Hotels (1-20 rooms)**

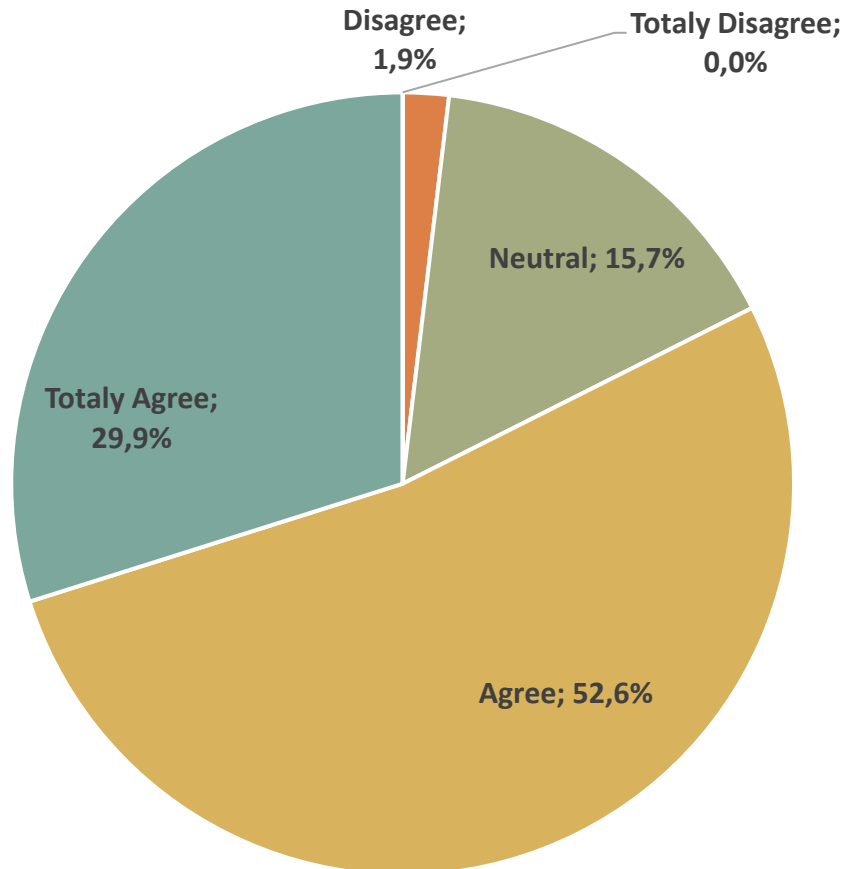


**Small (21-50 rooms)**

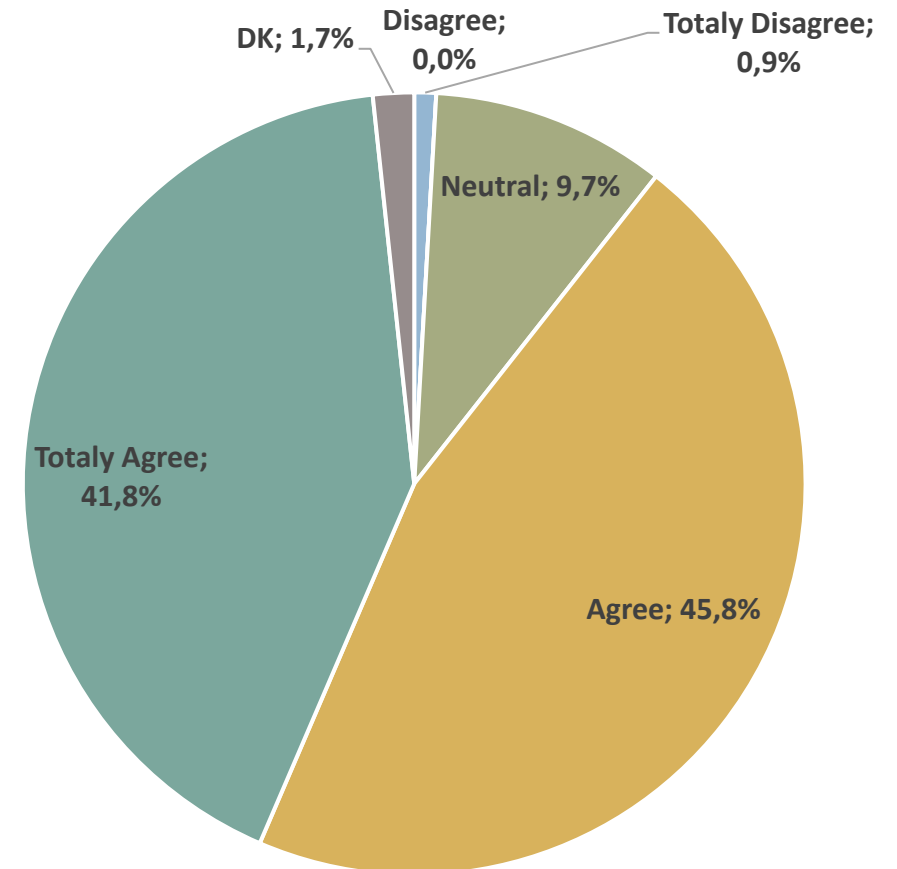


# "The adoption of sustainability practices is critical for the future of my hotel business" (2)

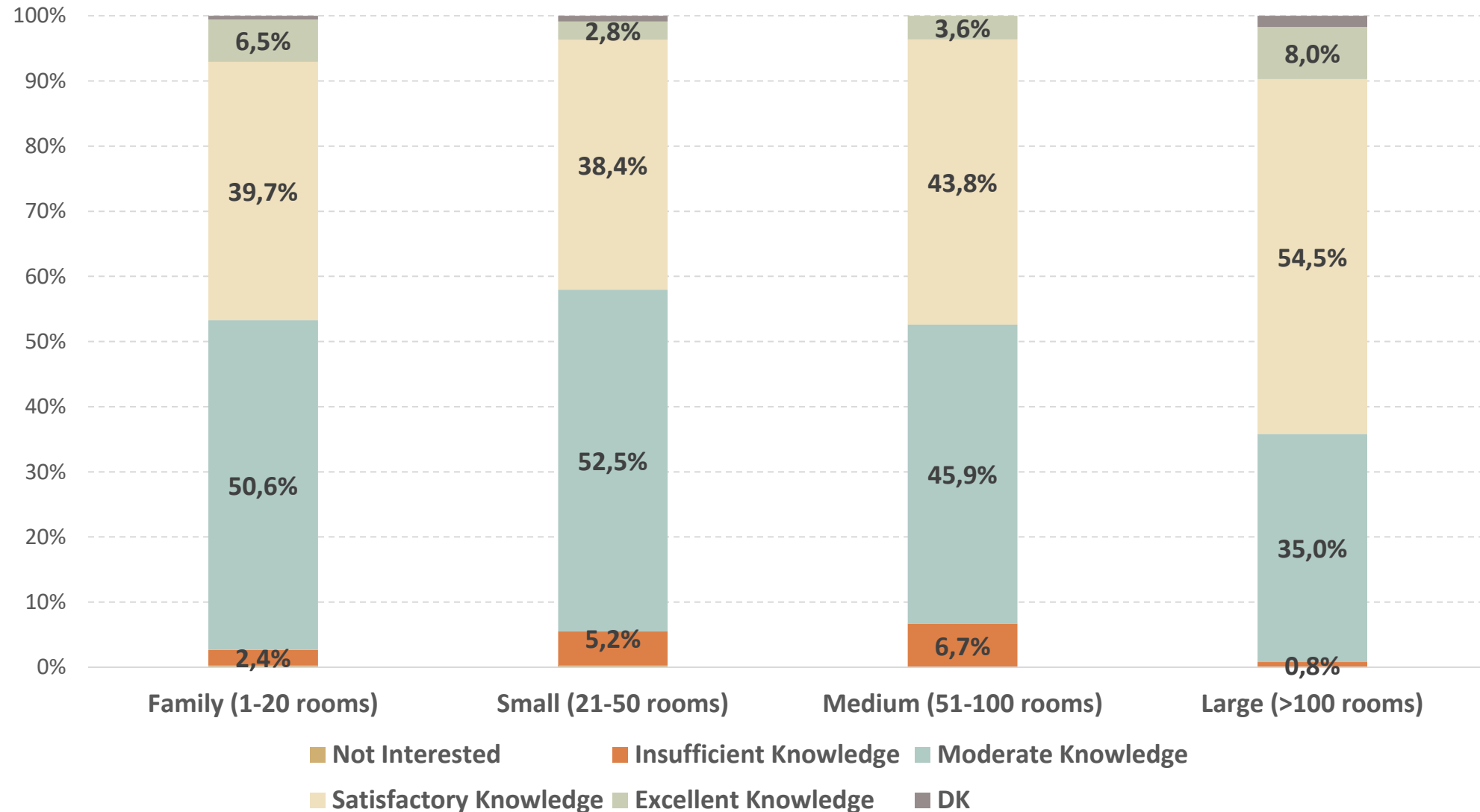
Medium (51-100 rooms)



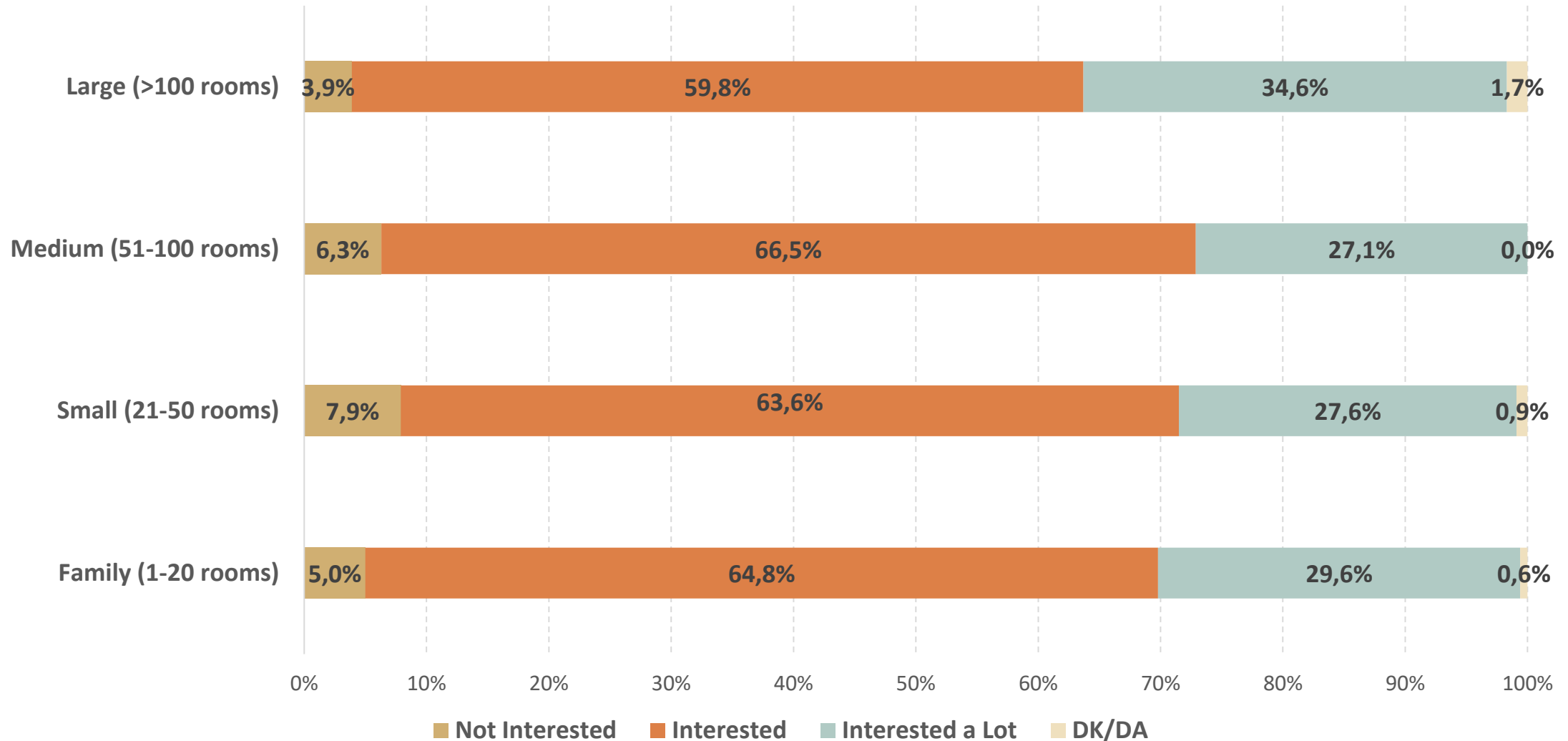
Large (>100 rooms)



# Ratio of Respondents on self-assessment regarding the knowledge level on issues of environmental sustainability

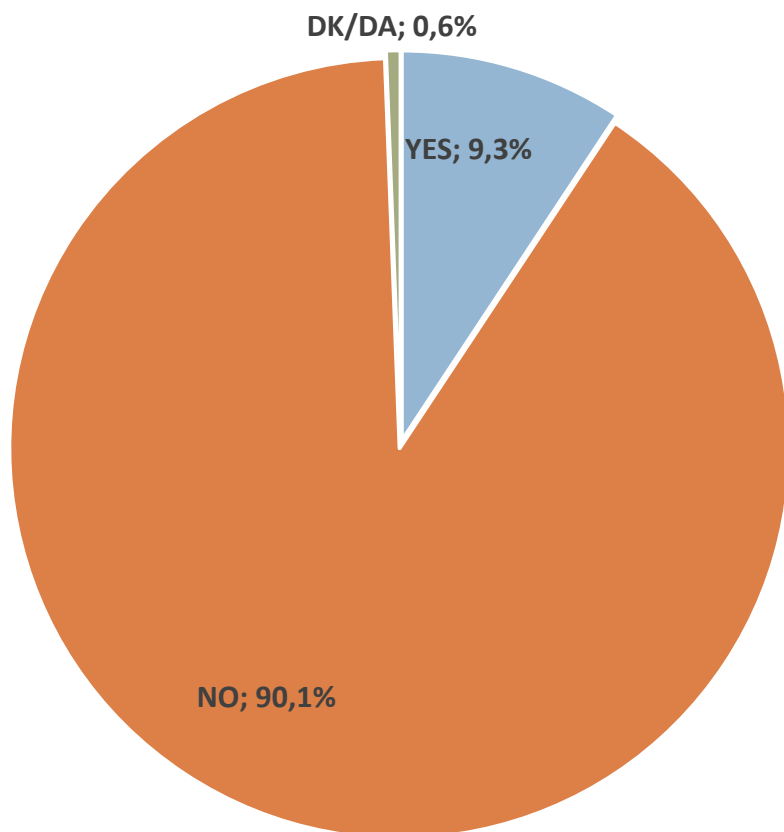


# Interest for further information on sustainable practices that can be applied/are applied in the hotel industry

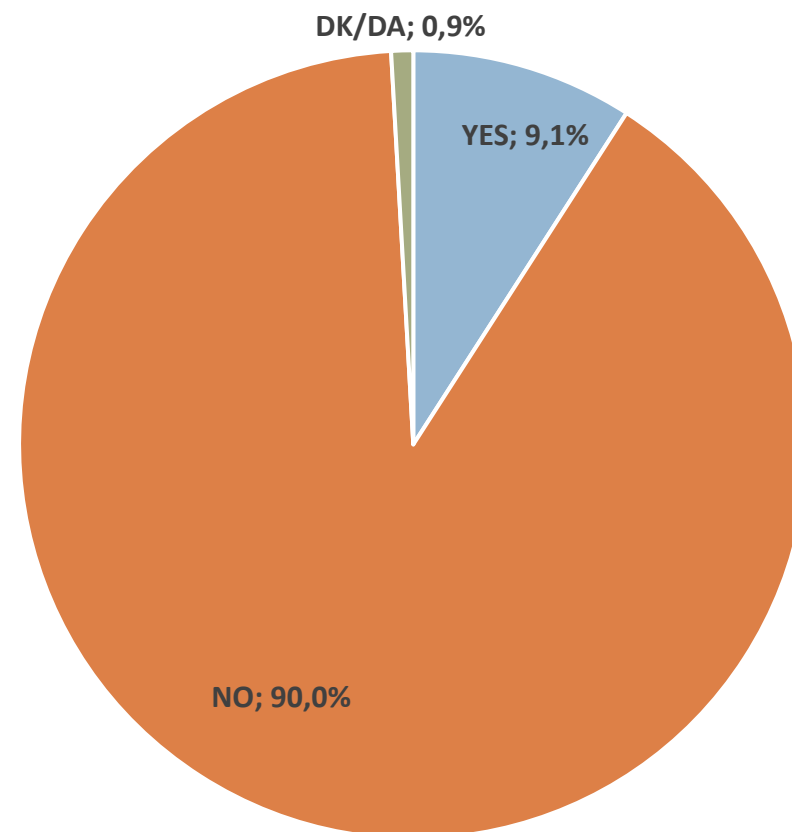


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**Family Hotels (1-20 rooms)**

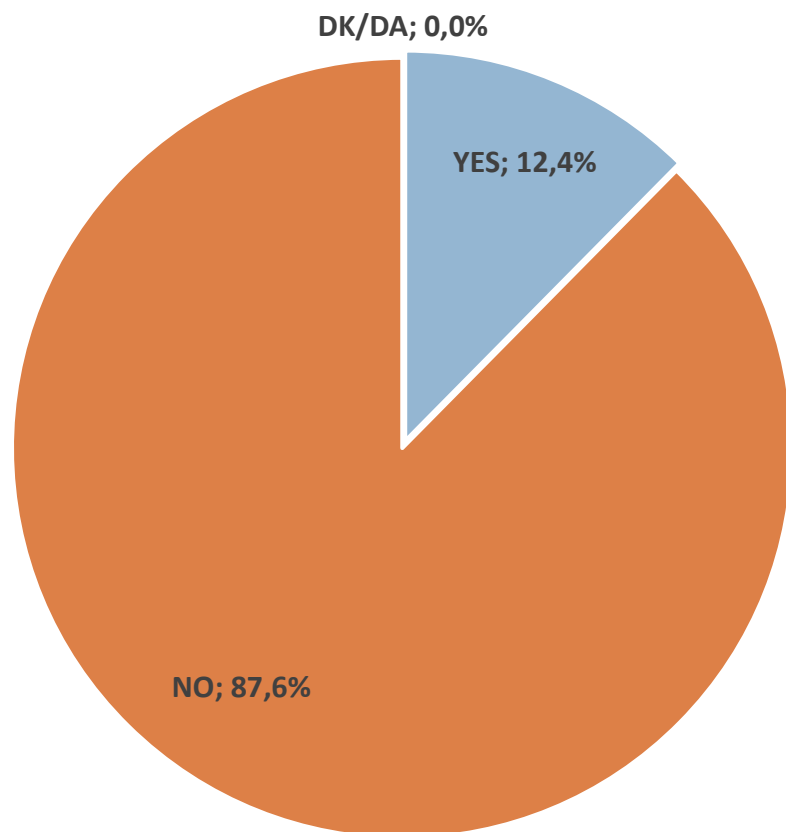


**Small (21-50 rooms)**

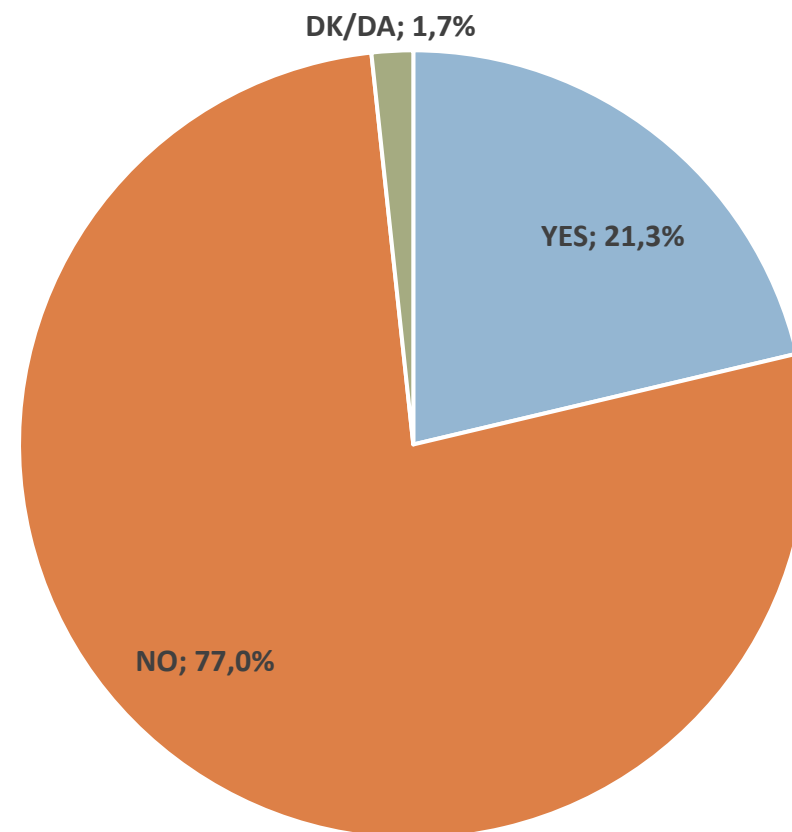


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Medium (51-100 rooms)

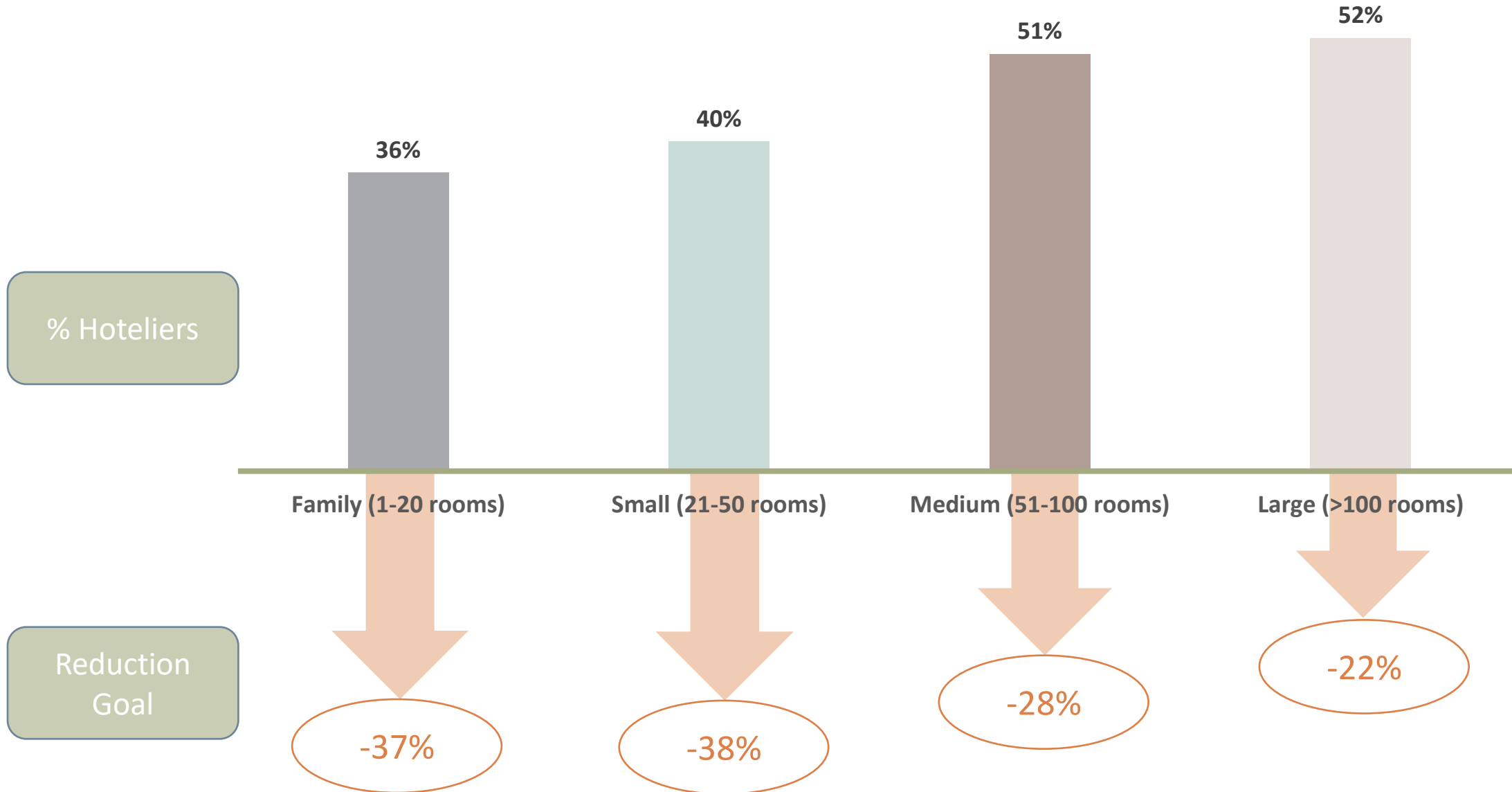


Large (>100 rooms)

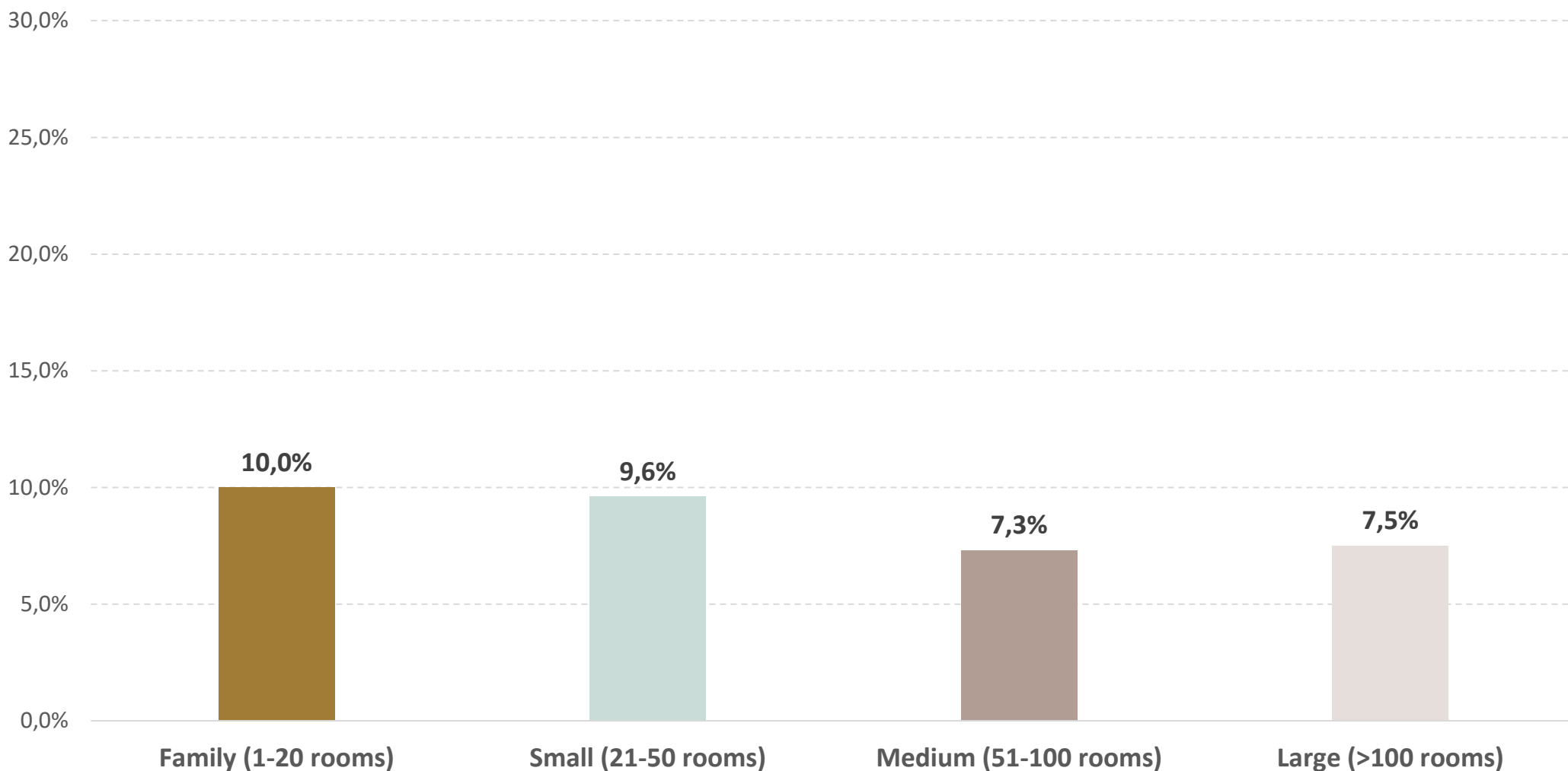




# Minimization of carbon dioxide emissions and reduction goals of respondents



# Total annual investments in environmental protection practices as a percentage of annual turnover



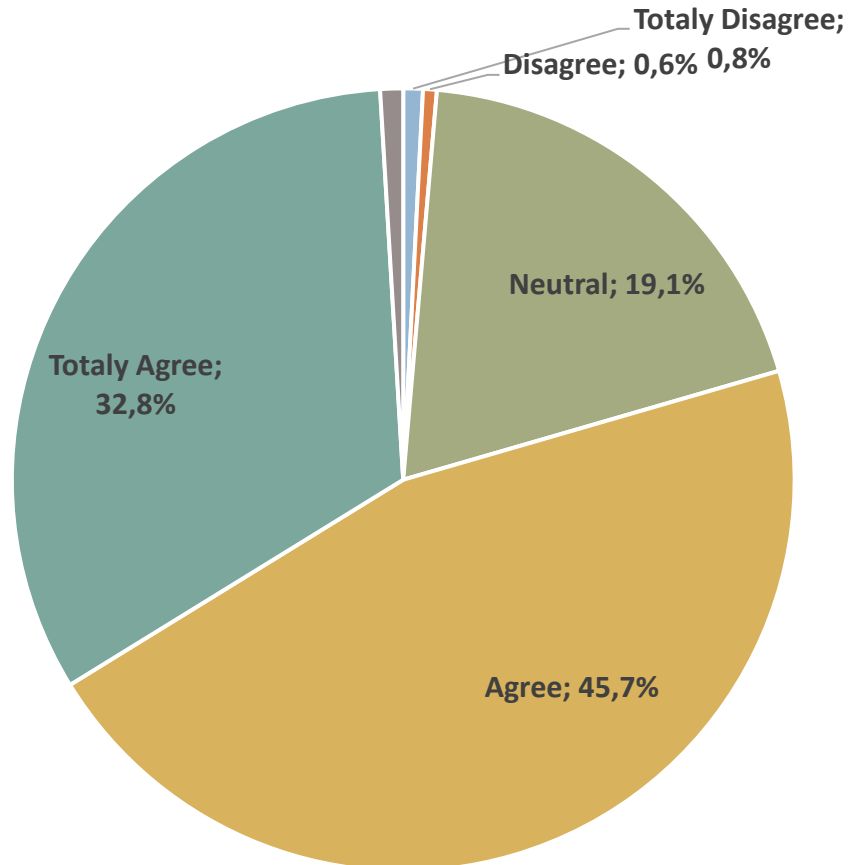
# *Environmental Sustainability in the Hotel Industry*

*Analysis based on THE COMPANY LEGAL STATUS*

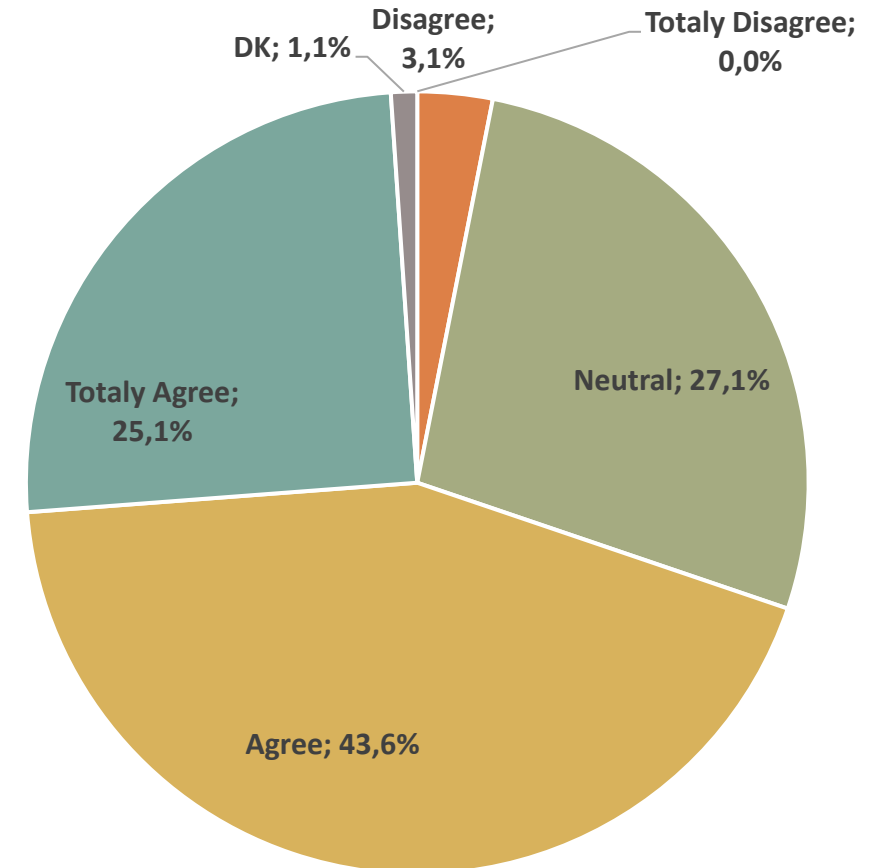


# "The adoption of sustainability practices is critical for the future of my hotel business"

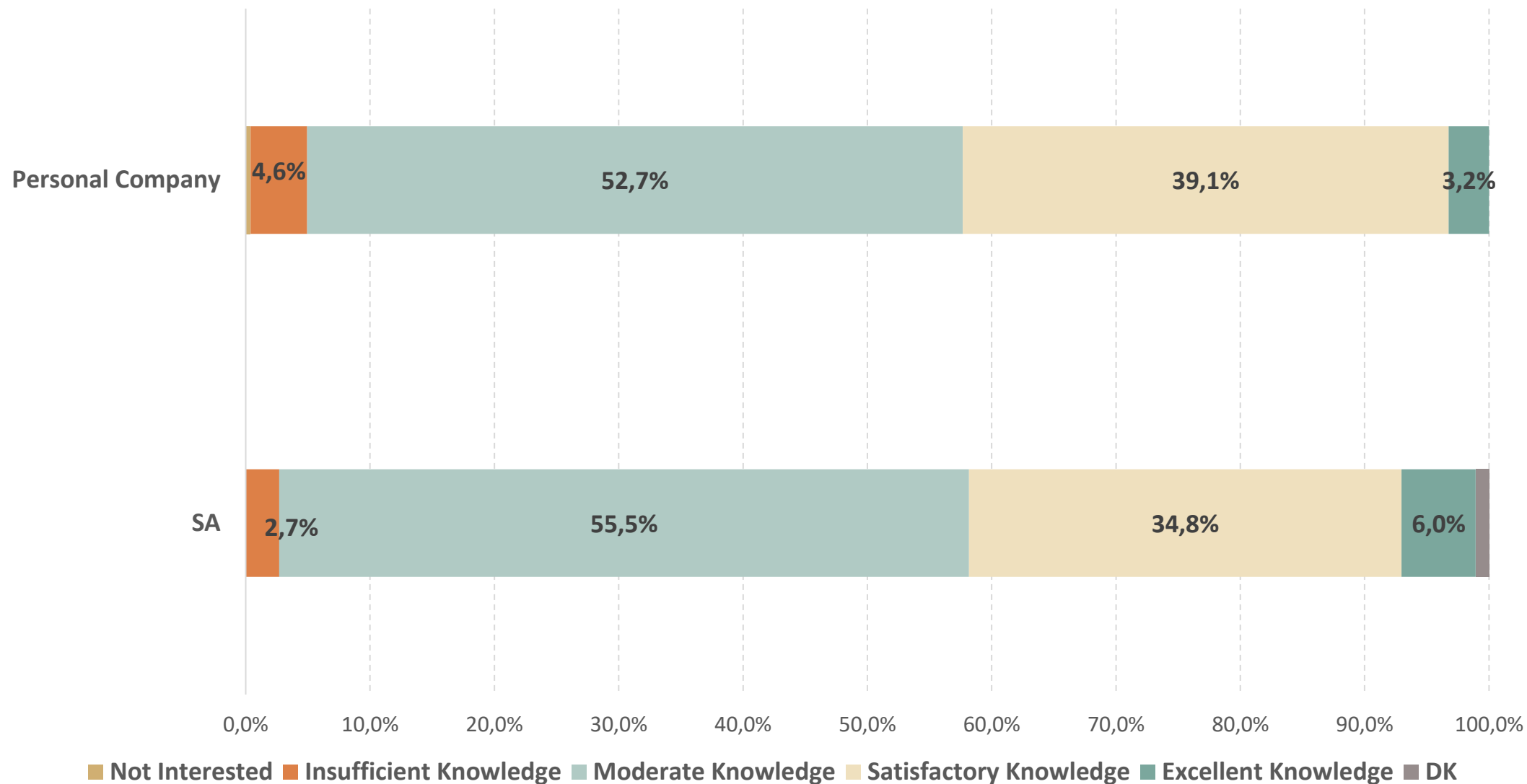
SA



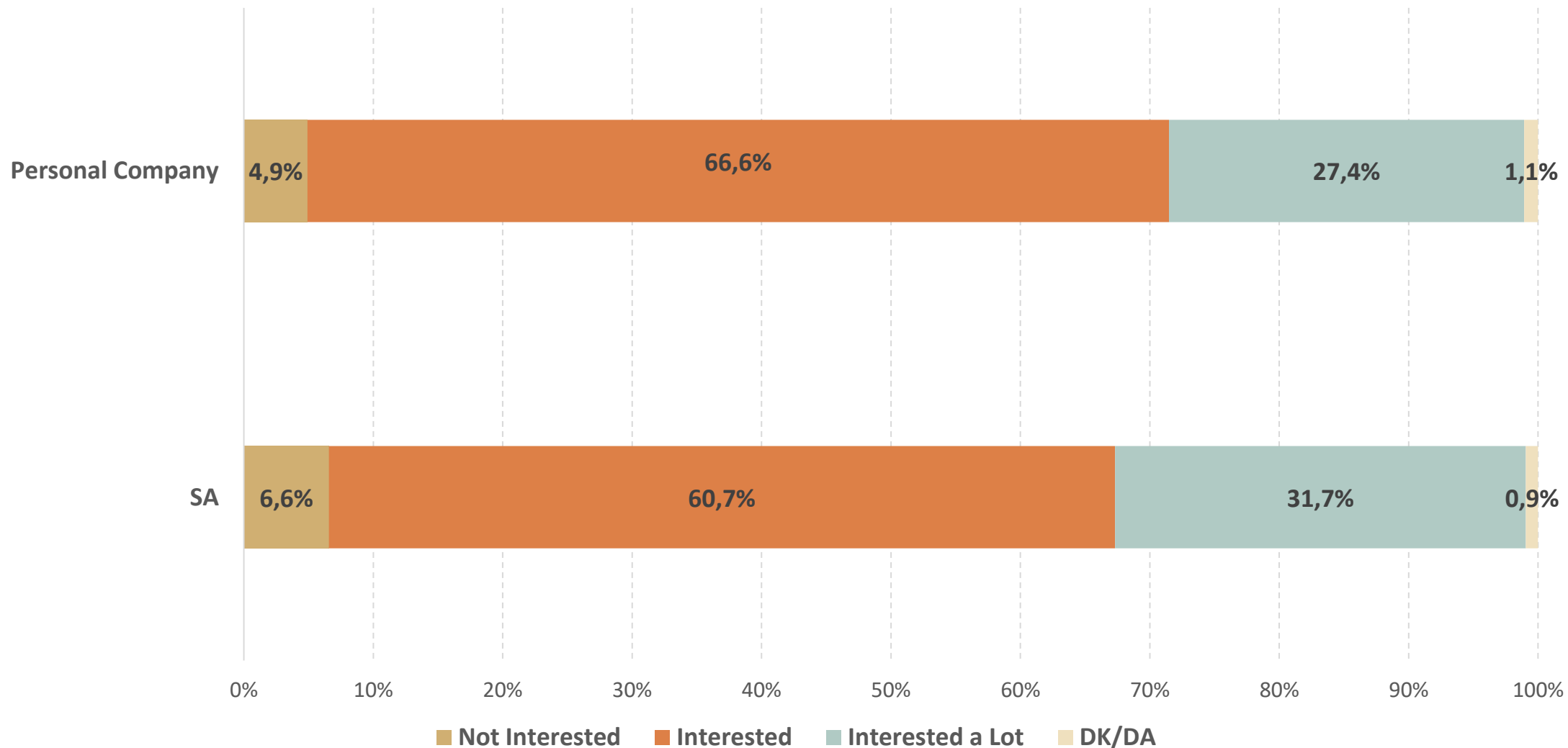
Personal Company



# Ratio of Respondents on self-assessment regarding the knowledge level of on issues of environmental sustainability

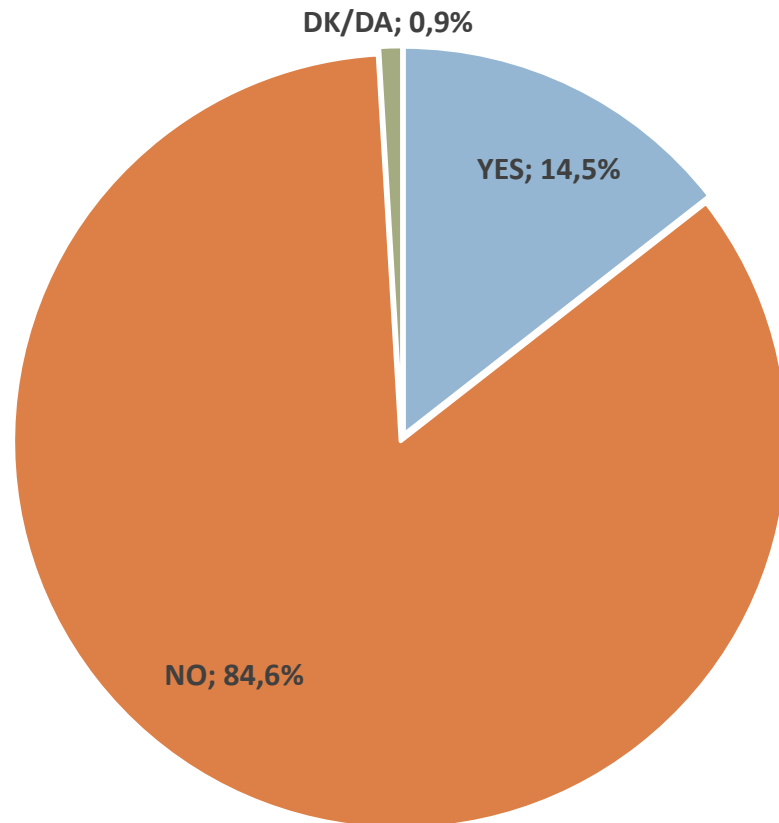


# Interest for further information on sustainable practices that can be applied/are applied in the hotel industry

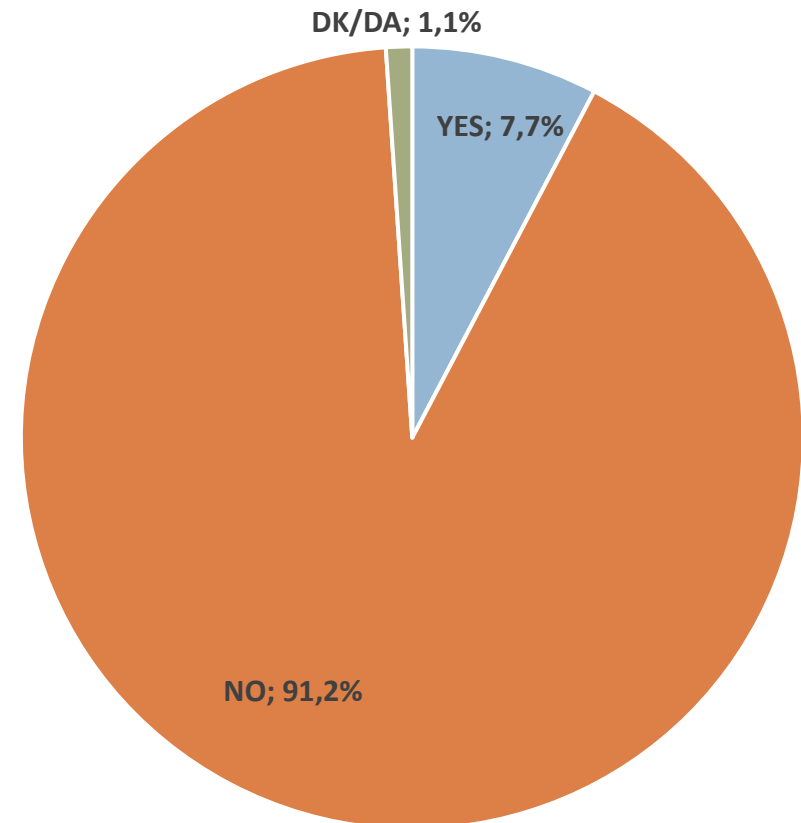


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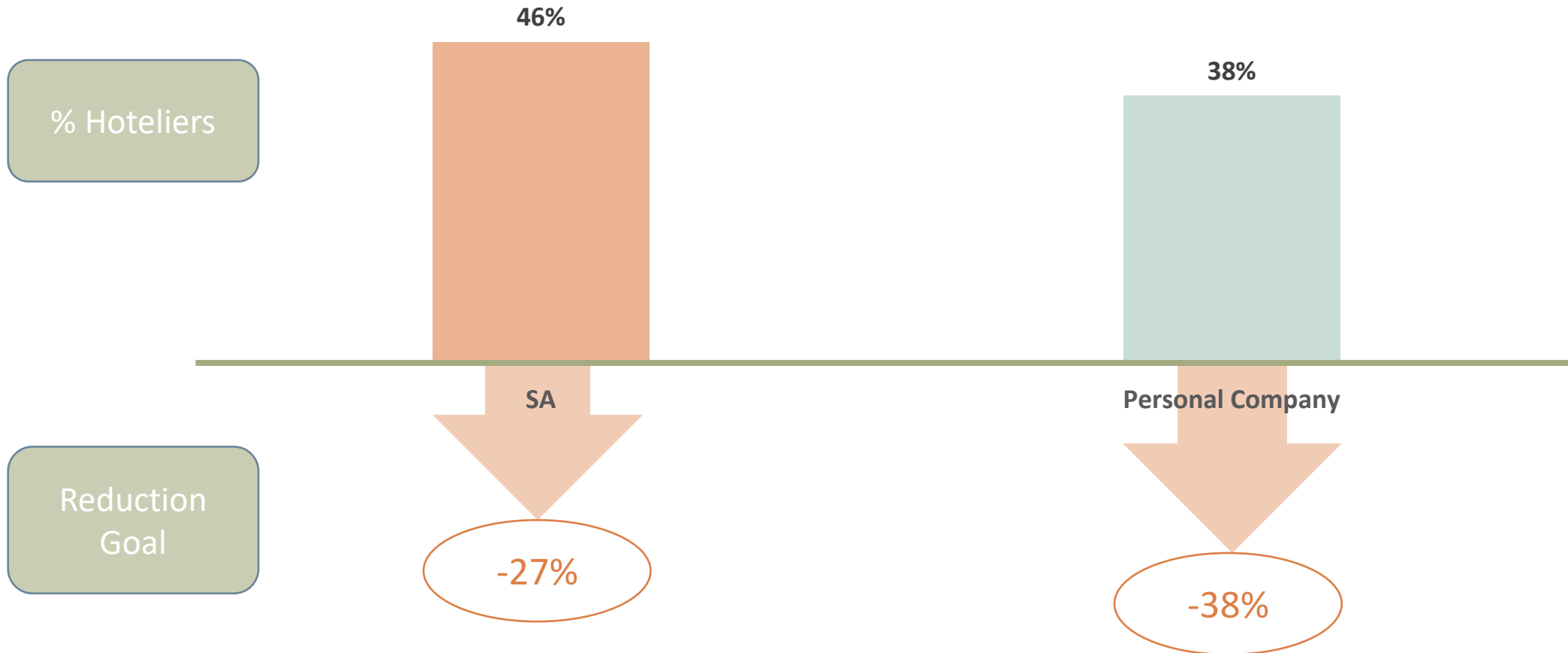
SA



Personal Company

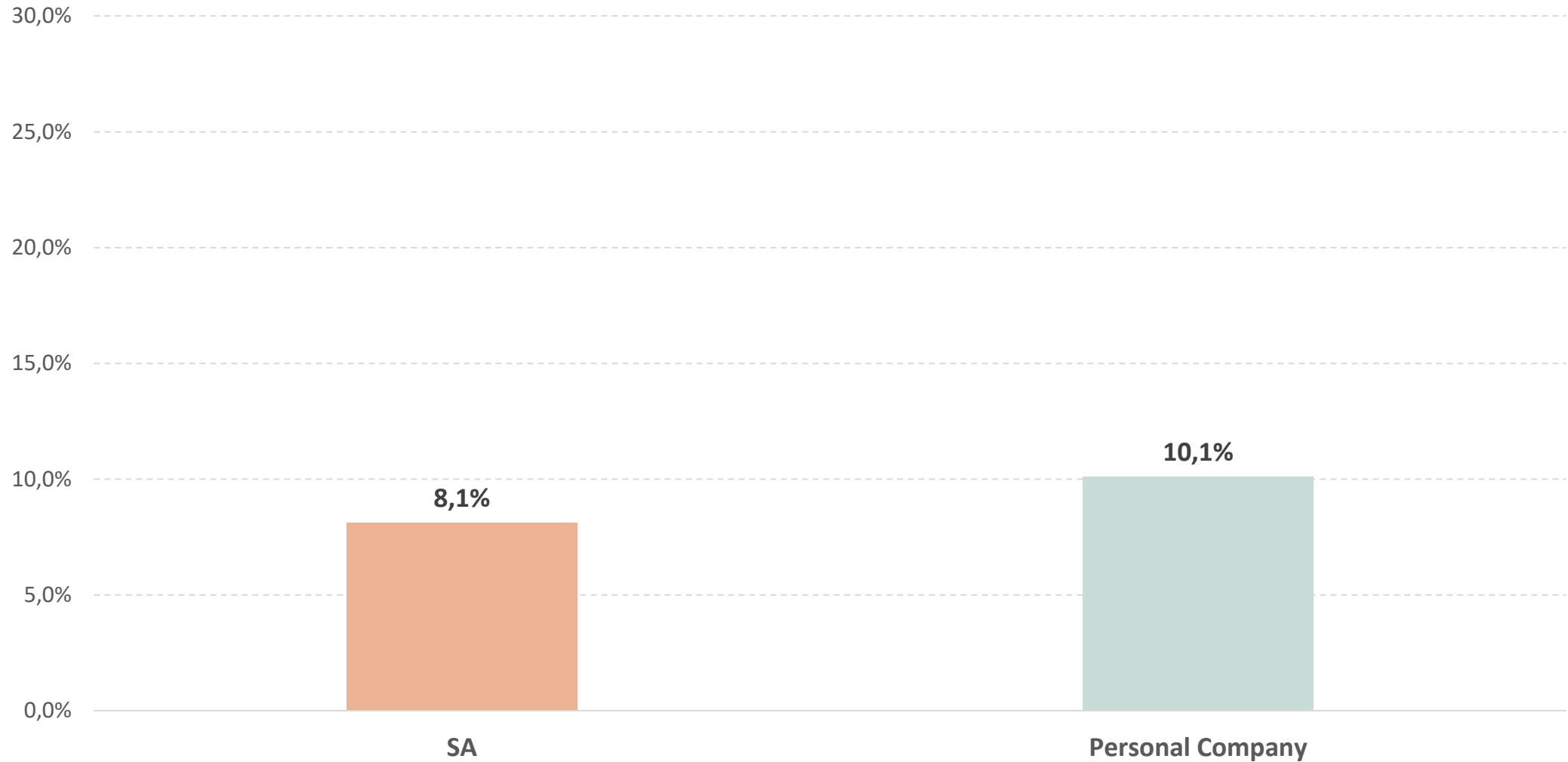


# Minimization of carbon dioxide emissions and reduction goals of respondents





# Total annual investments in environmental protection practices as a percentage of annual turnover

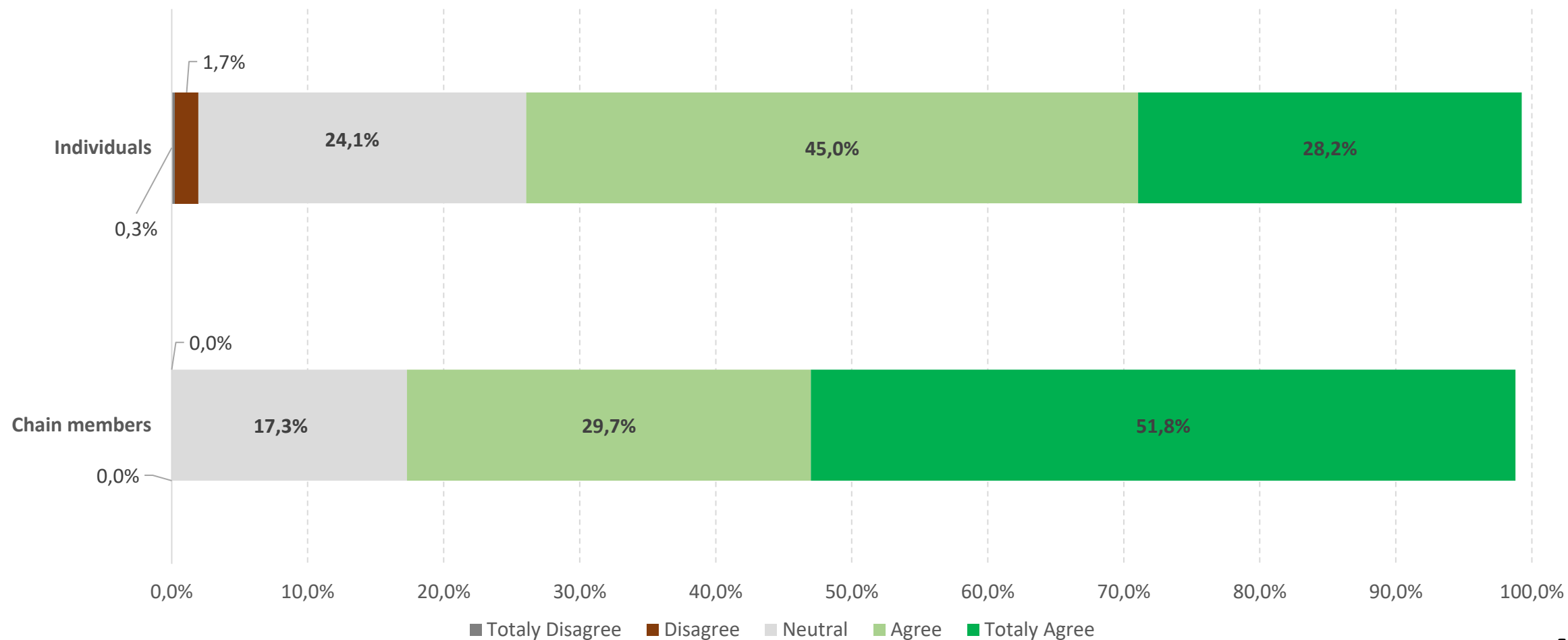


## *Environmental Sustainability in the Hotel Industry*

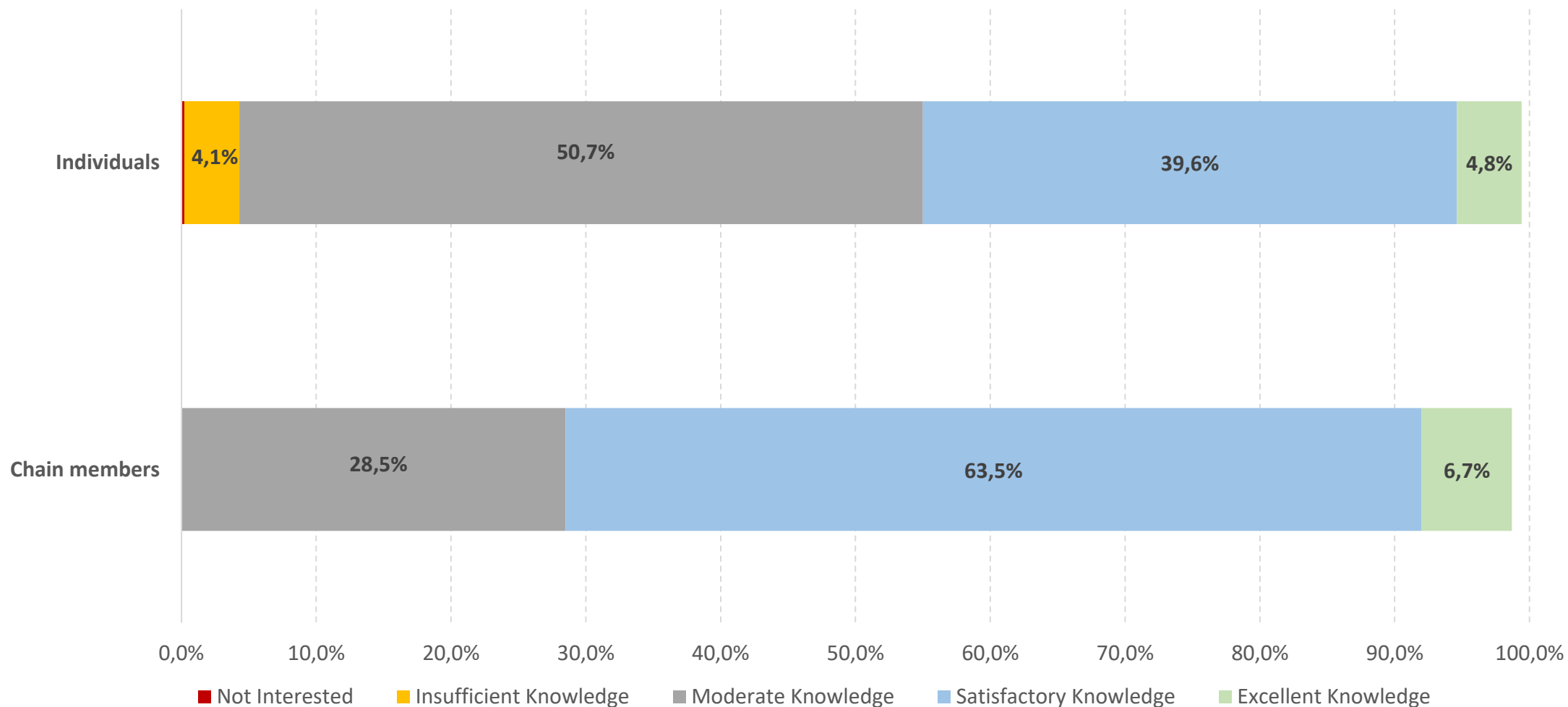
*Analysis based on THE INTEGRATION IN A CHAIN*



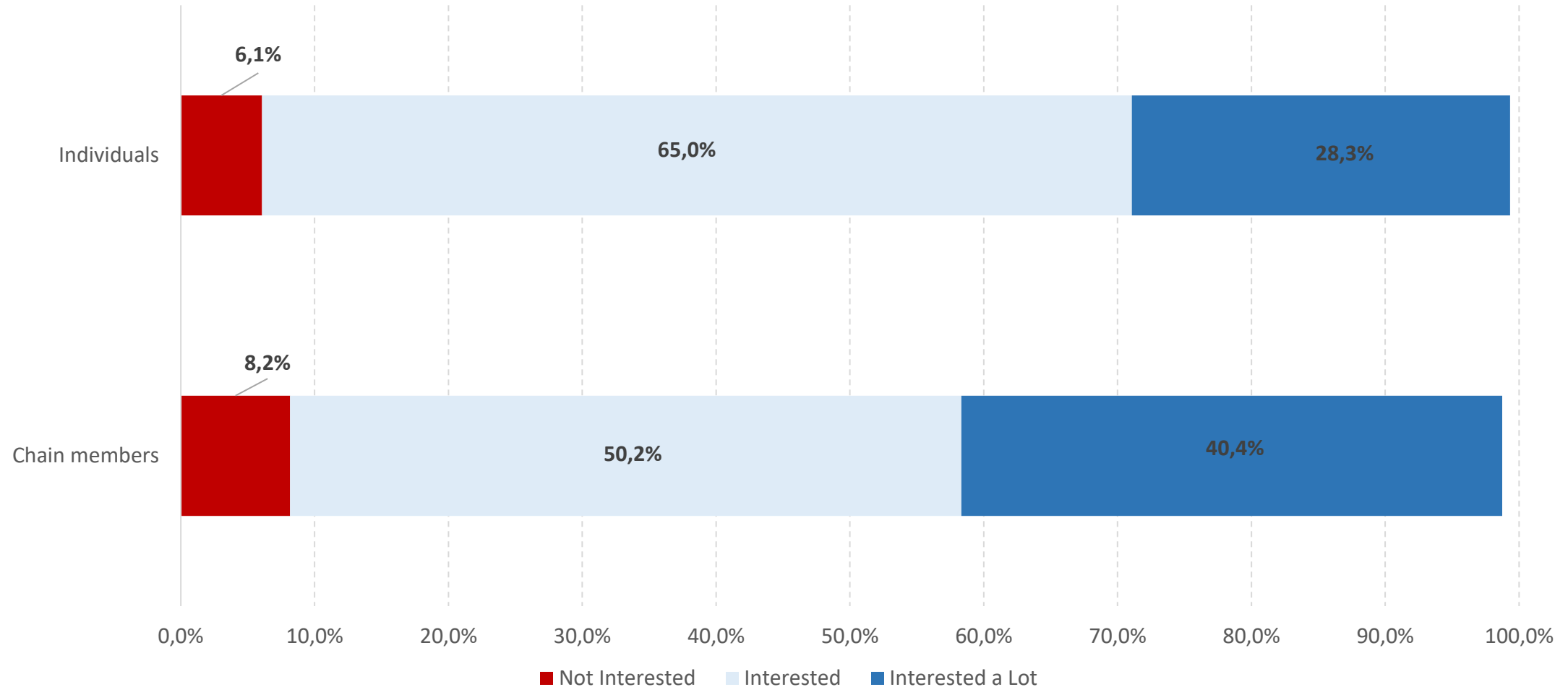
"The adoption of sustainability practices is critical for the future of my hotel business"



# Ratio of Respondents on self-assessment regarding the knowledge level on issues of environmental sustainability

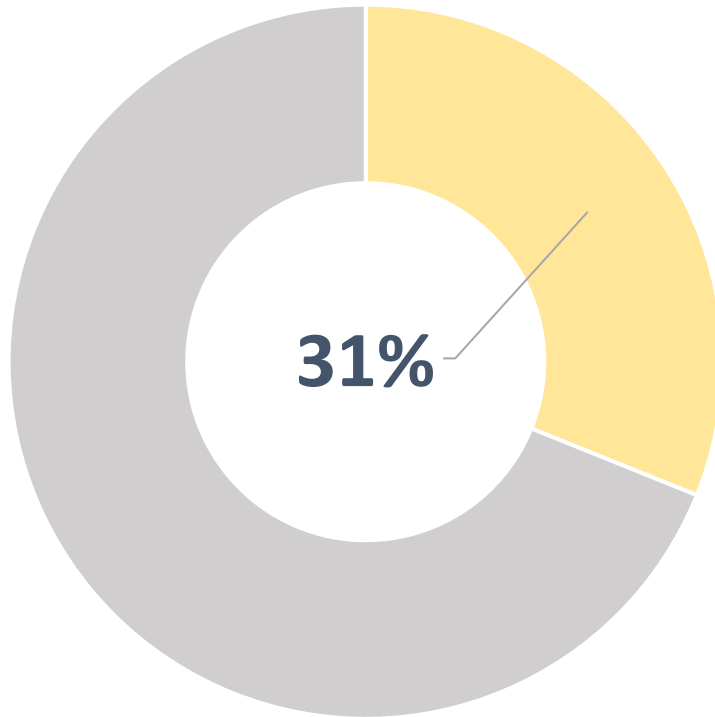


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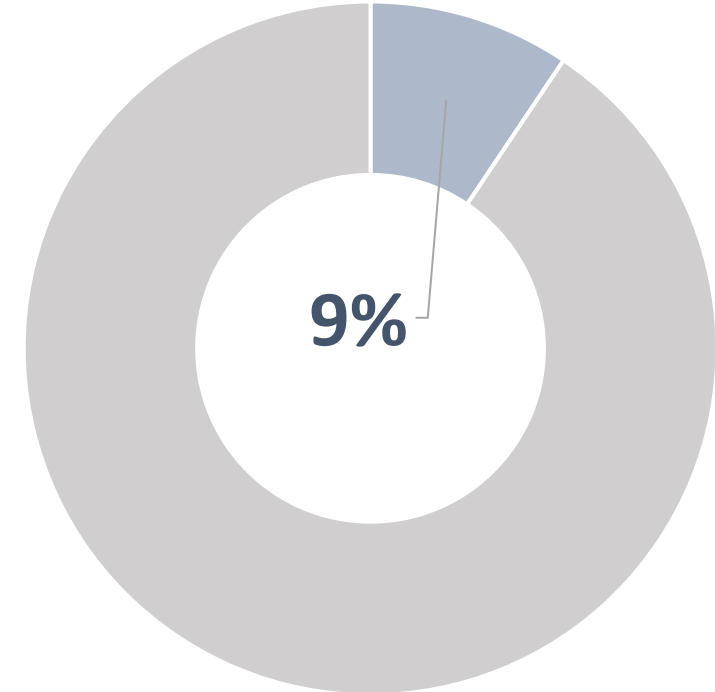


Application of methods for measuring the carbon footprint of hotel, i.e., the total amount of CO<sub>2</sub> and other greenhouse gas emissions caused directly and indirectly by the operation of the hotel

Chain Members

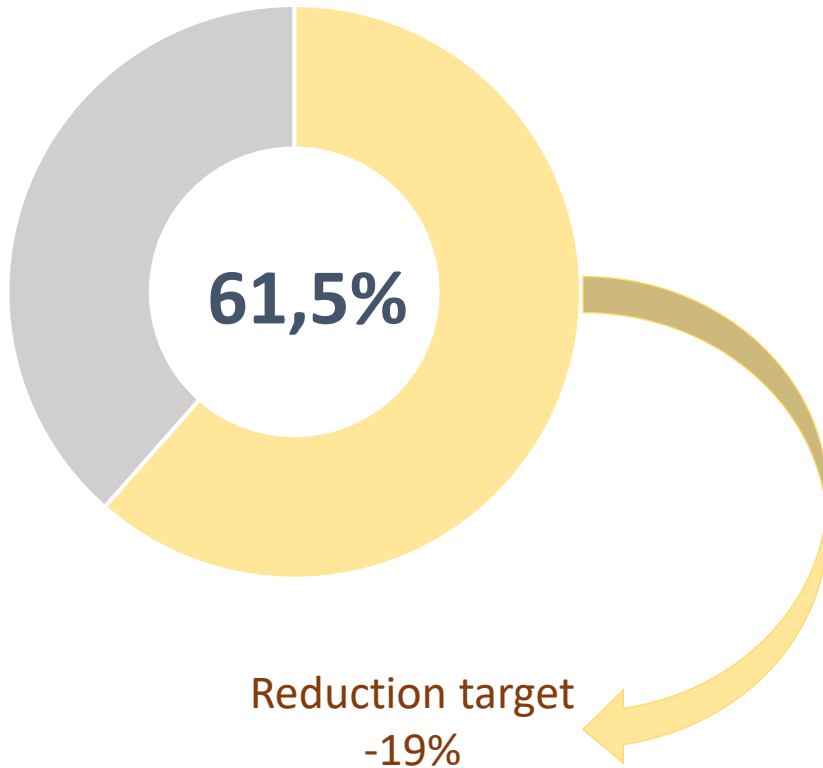


Individual Hotels

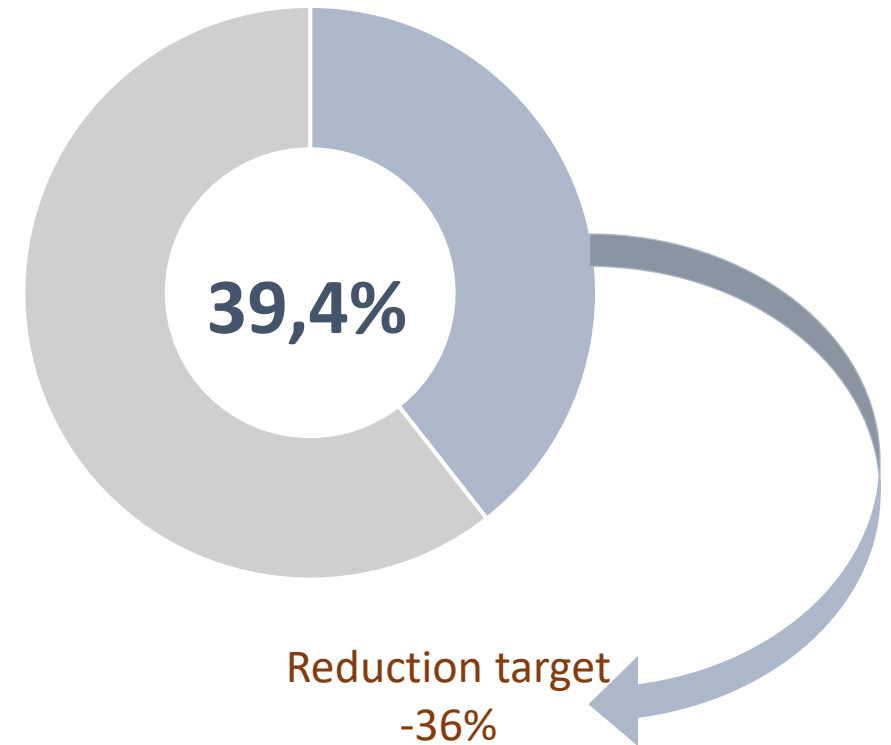


# Minimization of carbon dioxide emissions and reduction goals of respondents

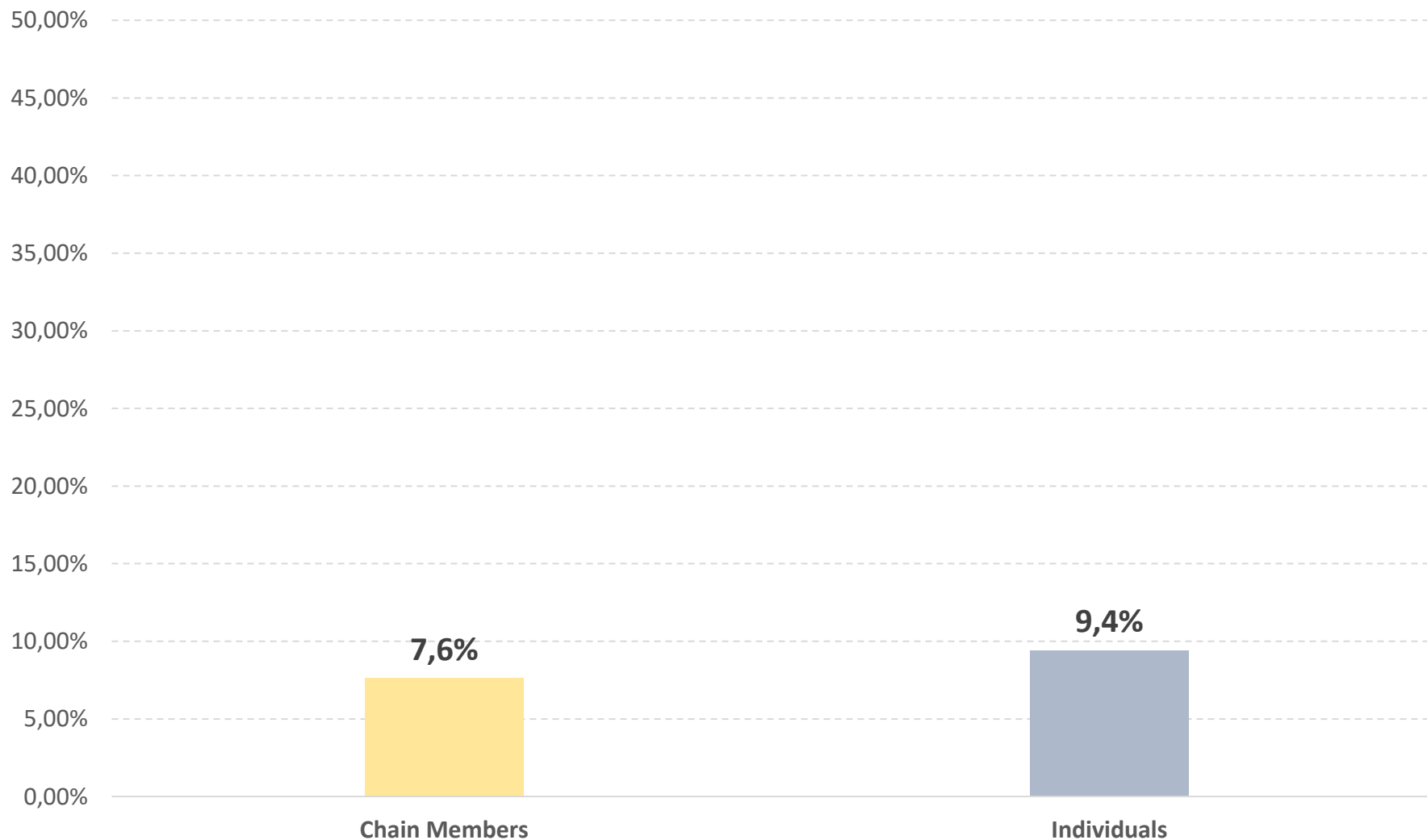
Chain Members



Individual Hotels



## Total annual investments in environment protection practices as a percentage of annual turnover





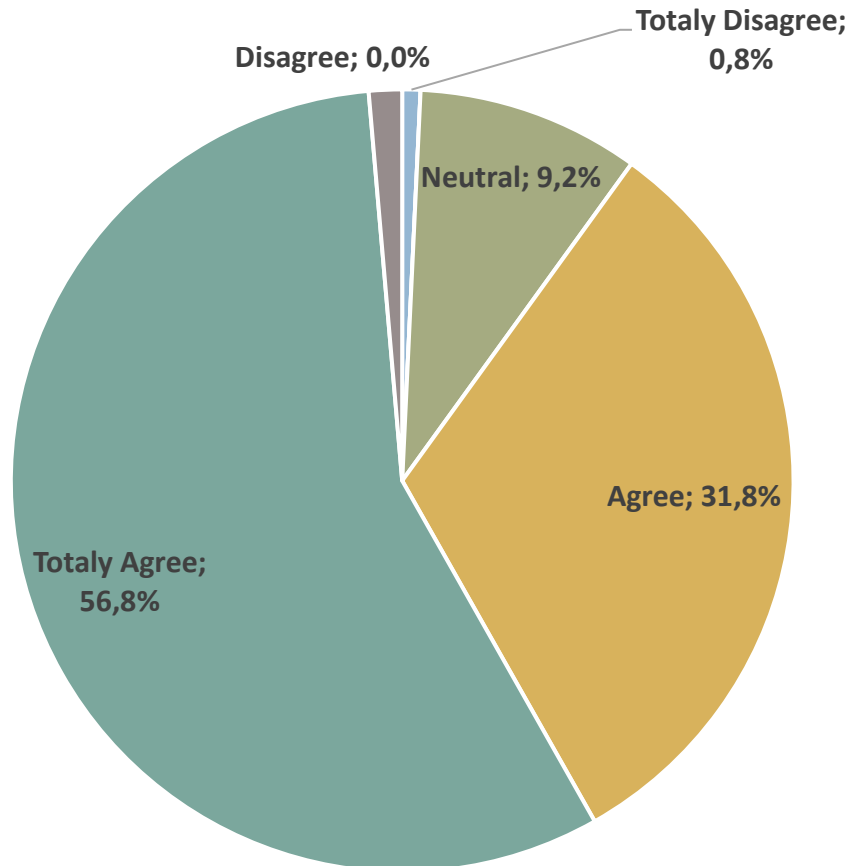
## *Environmental Sustainability in the Hotel Industry*

*Analysis based on EXISTENCE OF CERTIFICATION*

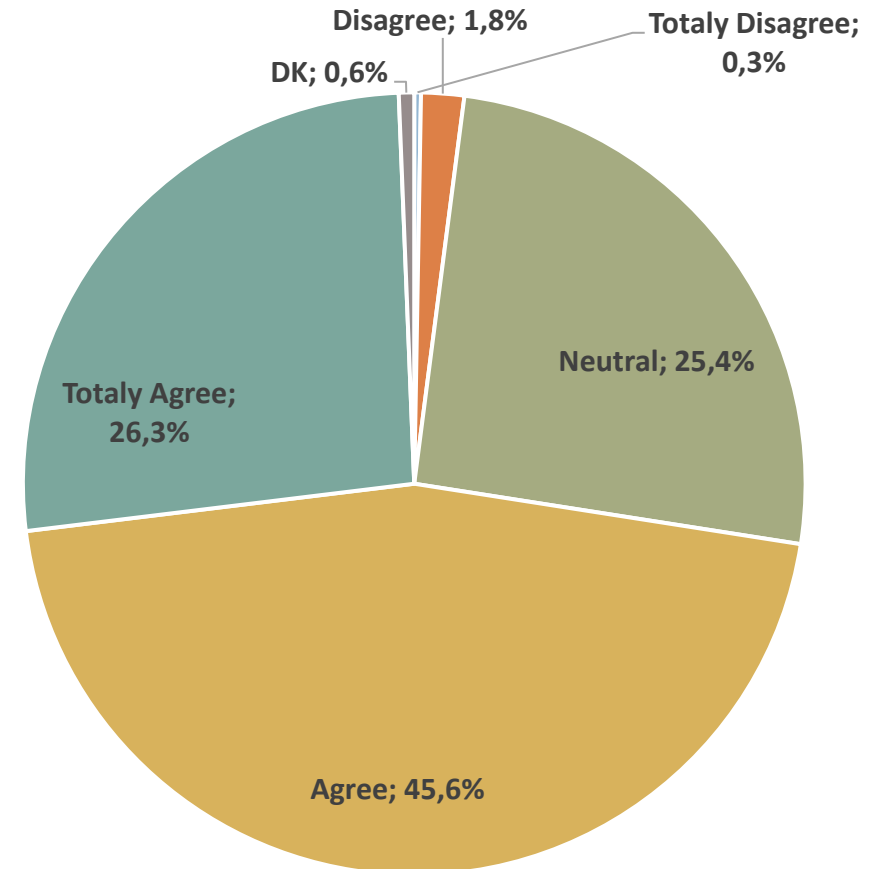


# "The adoption of sustainability practices is critical for the future of my hotel business"

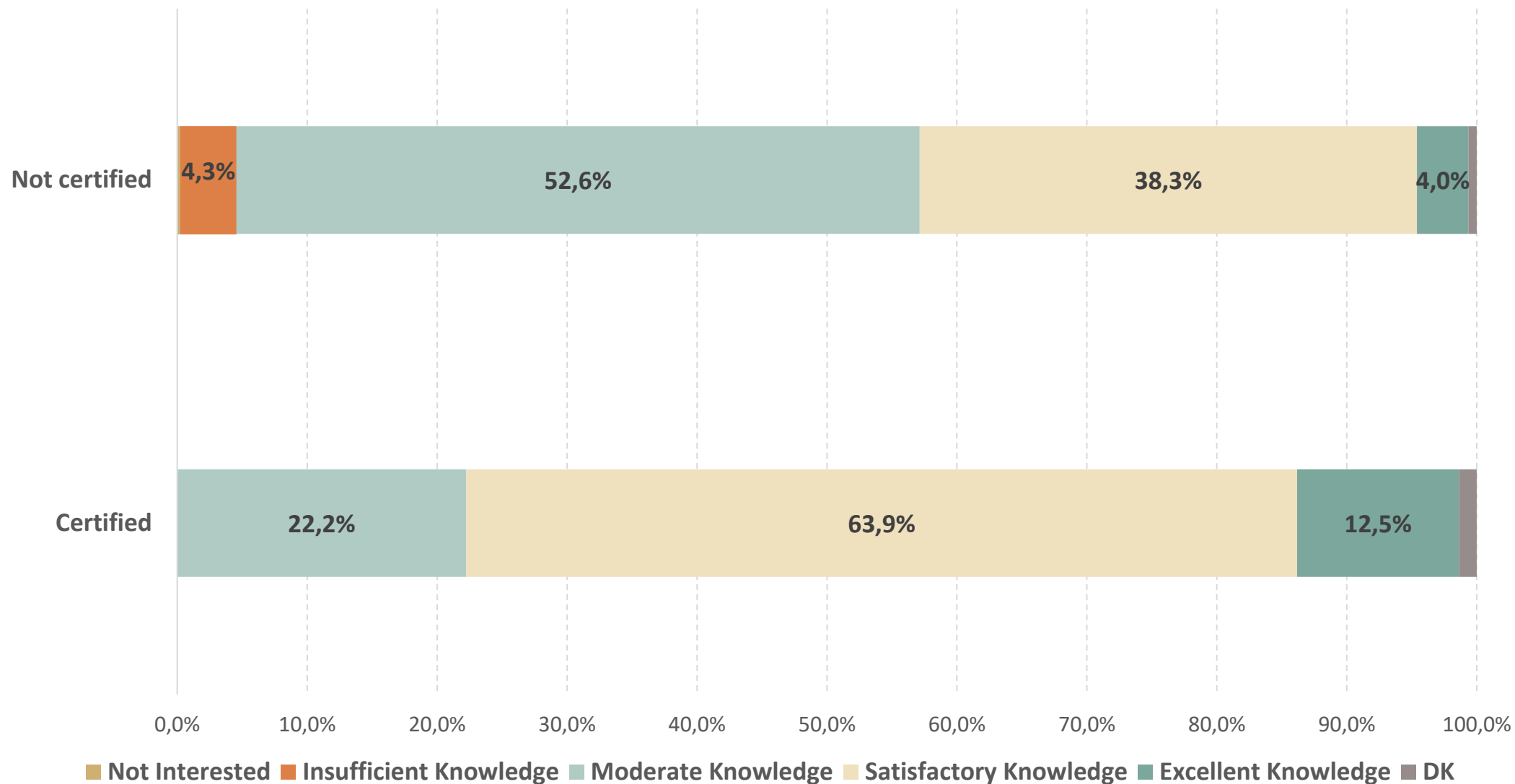
## Certified



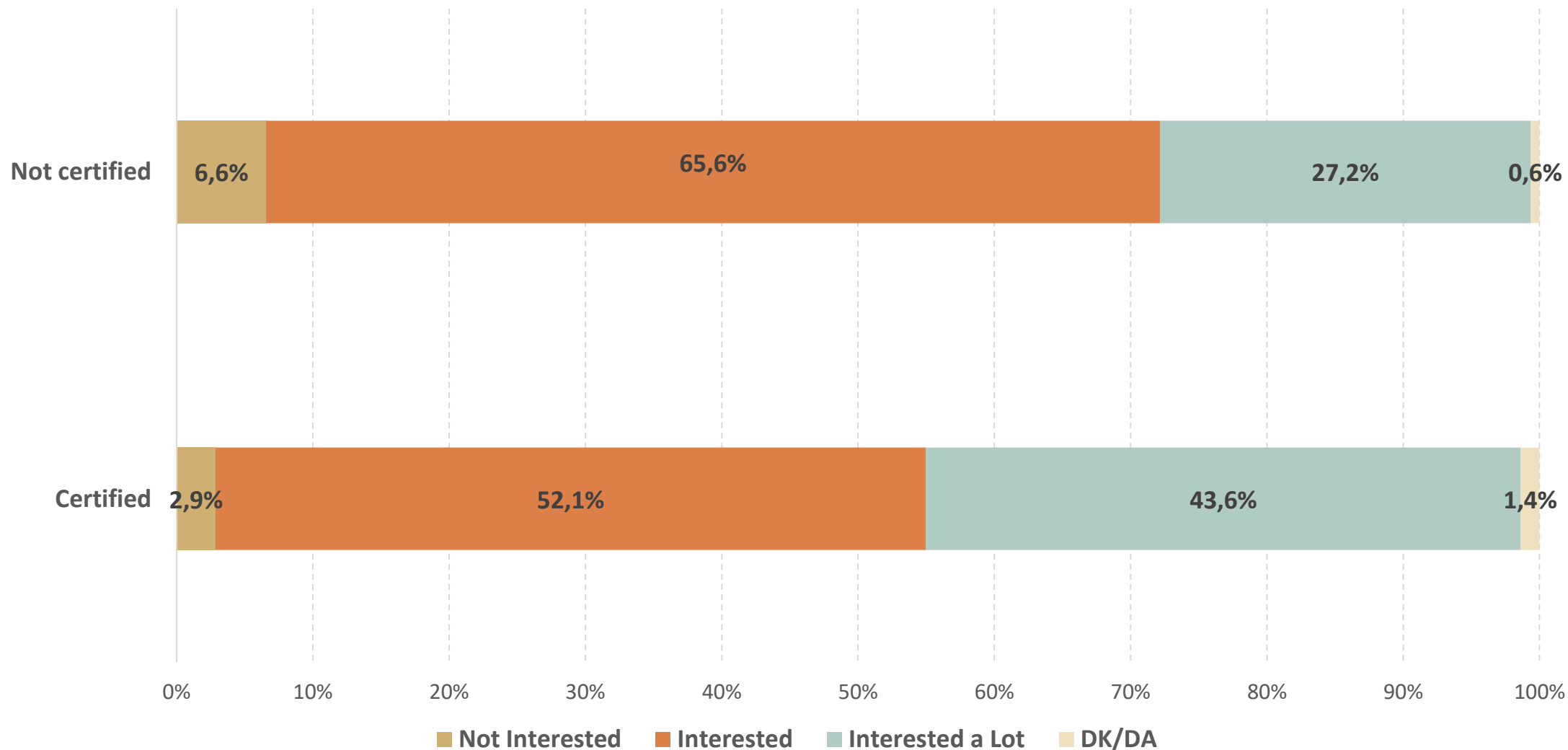
## Not certified



# Ratio of Respondents on self-assessment regarding the knowledge level on issues of environmental sustainability

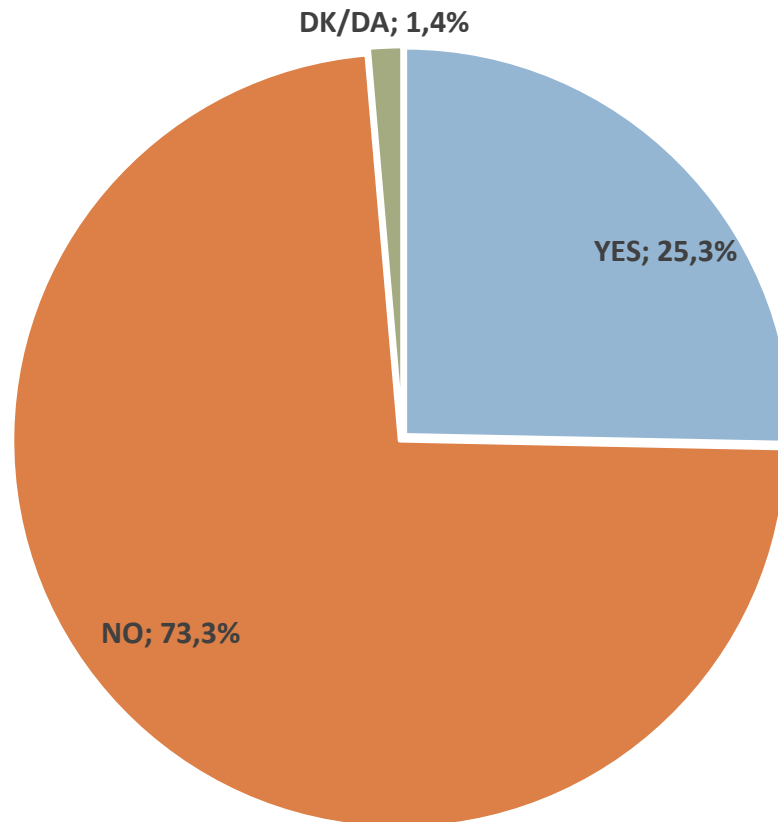


# Interest for further information on sustainable practices that can be applied/are applied in the hotel industry

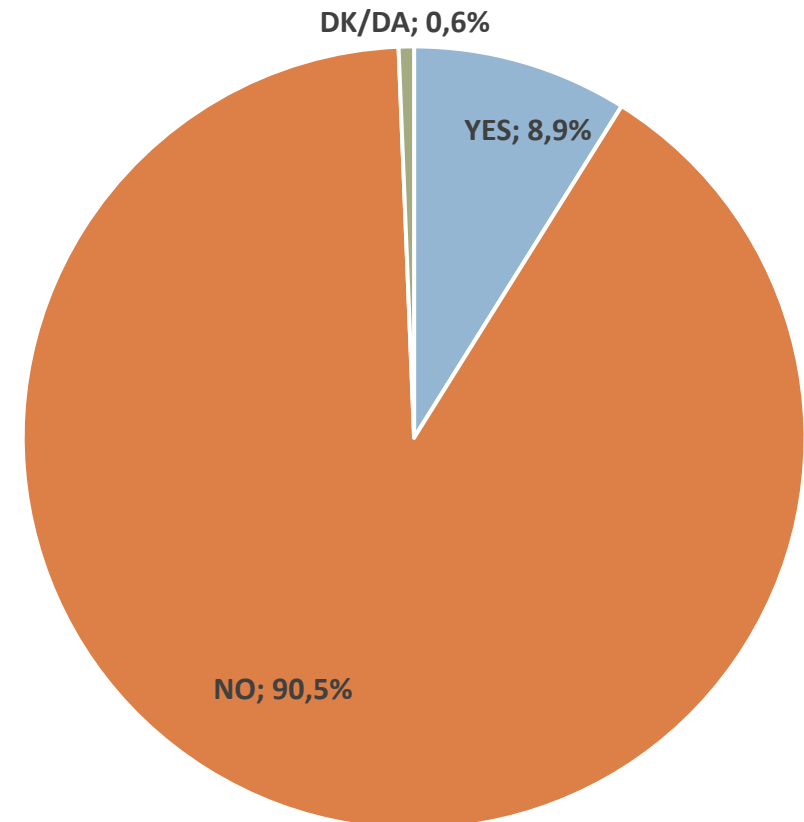


Application of methods for measuring the carbon footprint of hotel,  
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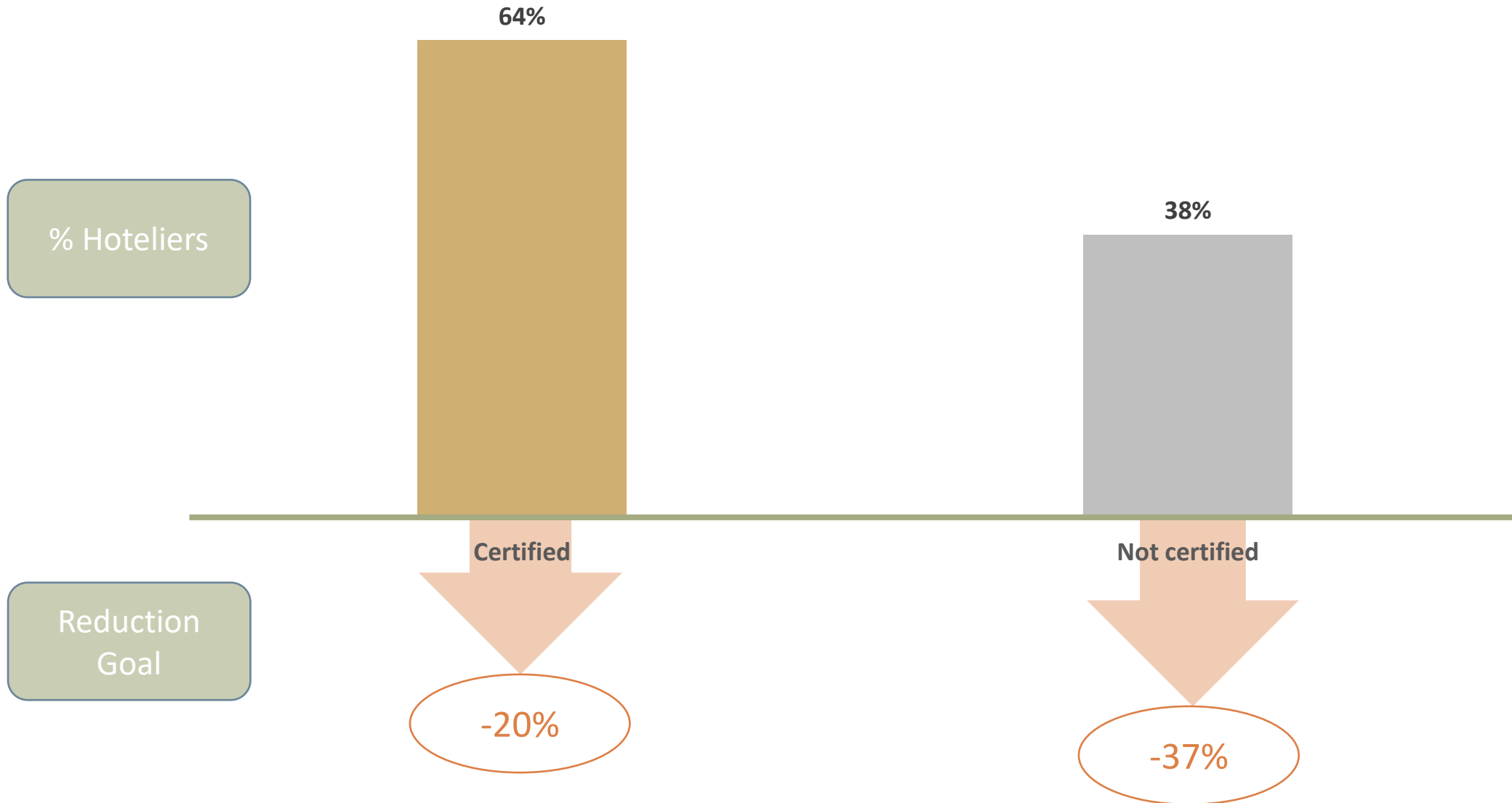
### Certified



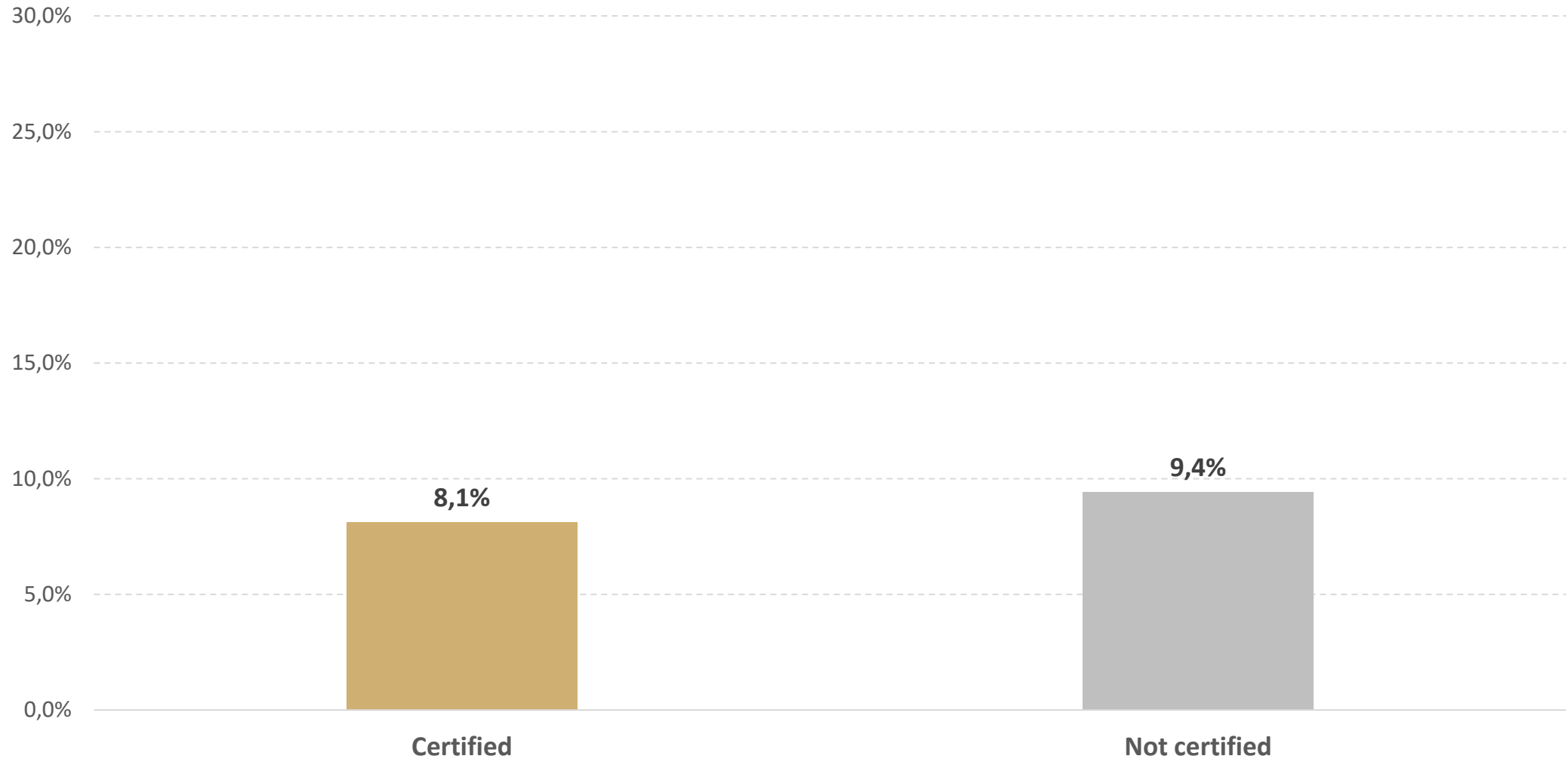
### Not certified



# Minimization of carbon dioxide emissions and reduction goals of respondents



# Total annual investments in environmental protection practices as a percentage of annual turnover



# Conclusions by classification

- The ratio of respondents with above average knowledge on environmental sustainability issues is higher in the Popular Islands (51.2%) compared to other destinations.
- Implementing sustainability practices is considered of high importance for the future of all hotels, regardless their size. However, Large and Medium hotels record higher ratios than Small and Family hotels.
- The knowledge level on environmental sustainability issues is much higher in Large Hotels.
- The ratio of hotels aiming to reduce carbon emissions is inversely proportional to their size. However, the opposite trend is recorded for the reduction goals.
- There is a tendency for the application of carbon imprint measurement methods to be more pronounced in hotels that are part of a chain.
- Certified hotels recognize to a much greater extent the importance of adopting sustainable practices for the future of their hotels compared to non-certified hotels.
- There is also a big difference in the knowledge level (of hoteliers) on issues of environmental sustainability between certified and non-certified hotels, with the latter exhibiting stronger interest for further information.
- The ratio of certified hotels monitoring the carbon emissions is significantly higher than the non-certified hotels (25% vs 9%).