



ΙΝΣΤΙΤΟΥΤΟ ΤΟΥΡΙΣΤΙΚΩΝ ΕΡΕΥΝΩΝ ΚΑΙ ΠΡΟΒΛΕΨΕΩΝ
RESEARCH INSTITUTE FOR TOURISM

Sustainability Practices of Greek Hotels and Educational Needs on Sustainability Issues



Athens, March 2023



Survey Identity

SURVEY TITLE	Sustainability Practices and Educational Needs
ASSINING BODY	Google Hellas
CONDUCTING BODY	Research Institute for Tourism
REFERENCE PERIOD	2023
SURVEY TIME PERIOD	22 nd February – 24 th March 2023
DELIVERING DATE	31 st March 2023
POPULATION	Greek Hotels
STATISTICAL UNIT	Hotel Unit
REGISTRY	HCH Registry
CLASSIFICATIONS	NUTS II (Regions), Category, Size of Hotels
SAMPLING METHOD	Stratified proportional sampling
WEIGHING	Triple (Region, Category, Size (Rooms))
SAMPLE/POPULATION SIZE	n=827/ N=10.133
COLLECTION METHOD	CAWI

CONTENTS

01. Total Country
02. Analysis based on hotel operation
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06. Regional Analysis



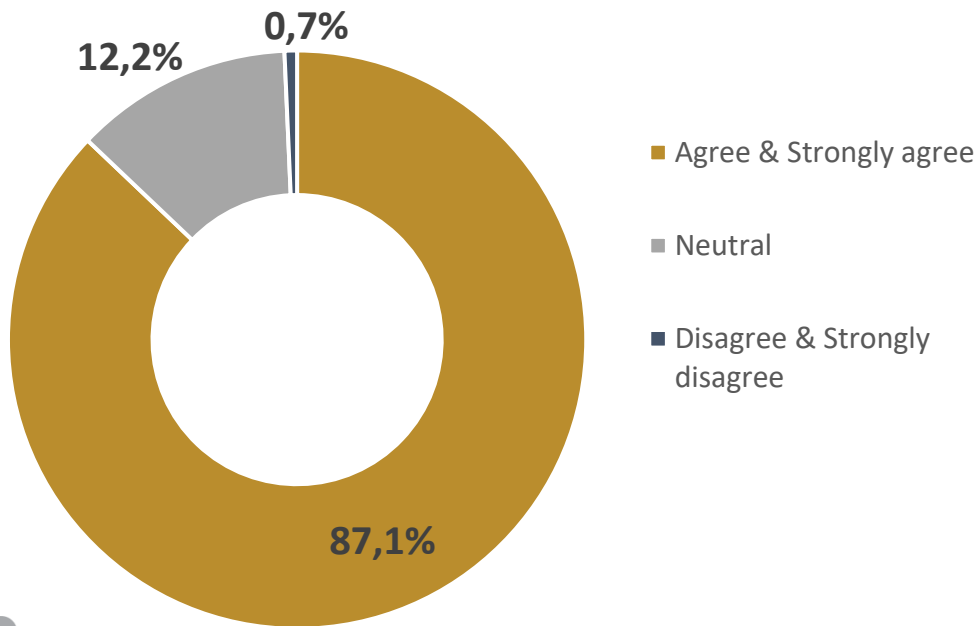
01

Total Country



Importance of sustainability practices for the hotel operation, 2023

Q: Do you agree or disagree with the following statement: "Adopting sustainability practices is important for the future of my hotel business".



The majority of the respondents (**87%**) consider that the adoption of sustainability practices is very important for the future of their hotel enterprise.



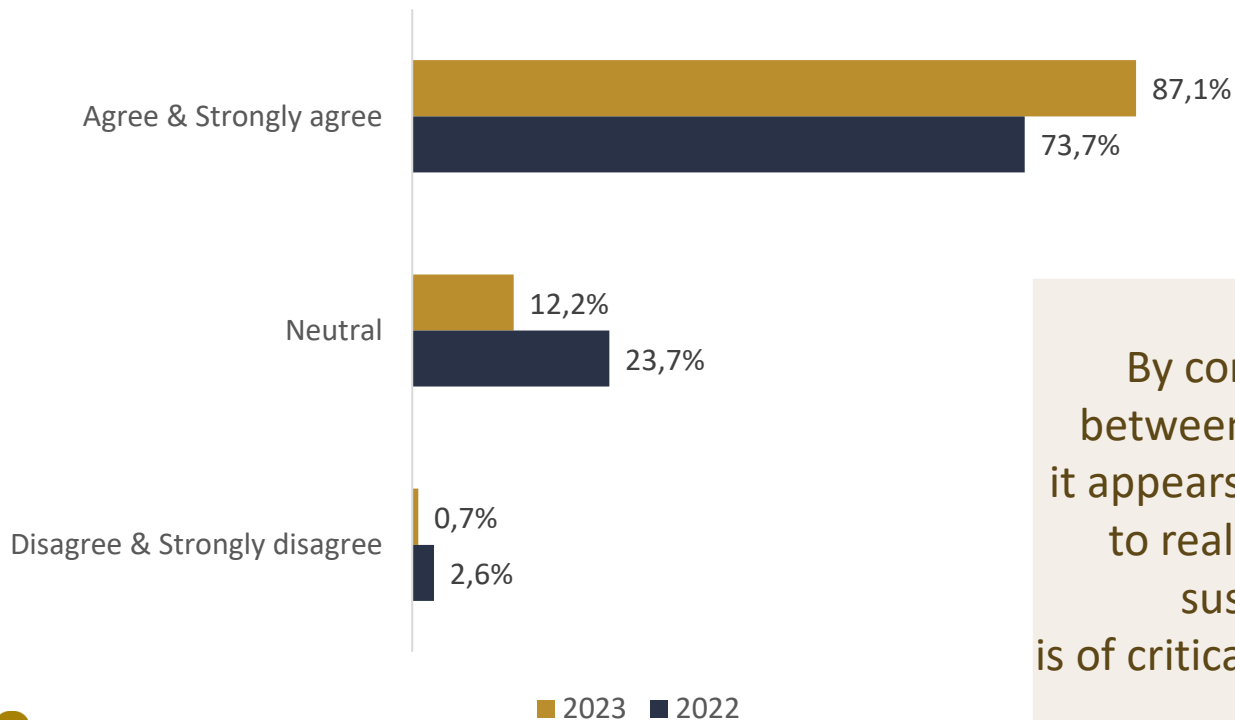
Importance of sustainability practices for the hotel operation, 2023:

Some conclusions

- 83,7% of year-round hotels and 89,2% of seasonal hotels “Agree & Strongly Agree” with the notion that the adoption of sustainability practices is very critical for the future of their businesses.
- The higher the category of the hotel, the higher the ration of respondents that “Agree & Strongly Agree” with the above assumption, ranging from 99,1% for 5-star hotels to 74,6% for 1-star hotels.
- The same pattern is recorded regarding the size of hotels with the ratio of respondents ranging from 97,3% for the large hotels to 82,9% for small-family hotels.
- Hoteliers in island destinations and especially in popular islands exhibit greater awareness regarding the acknowledgement of the importance of implementing sustainability practices (89,6% and 91,6%, respectively).
- As far as the regions are concerned, the lower rates are recorded in the region of Attica (73,7%), while Crete and South Aegean Islands record the highest scores (93,4% and 90,8%, respectively).



Importance of sustainability practices for the hotel operation, 2023 vs 2022

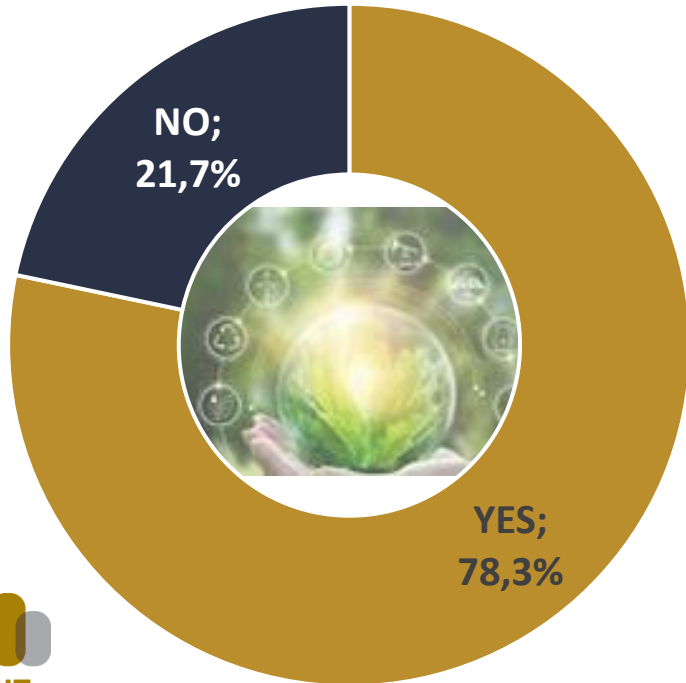


By comparing the responses between 2023 and 2022 surveys, it appears that hoteliers have begun to realize that the adoption of sustainability practices is of critical importance for the future of their business



Hotels that have or plan to implement sustainability practices

Q: *Have you adopted or plan to adopt Sustainable Practices?*



78%
of hotels have or intend to adopt
sustainability practices



Hotels that have or plan to implement sustainability practices

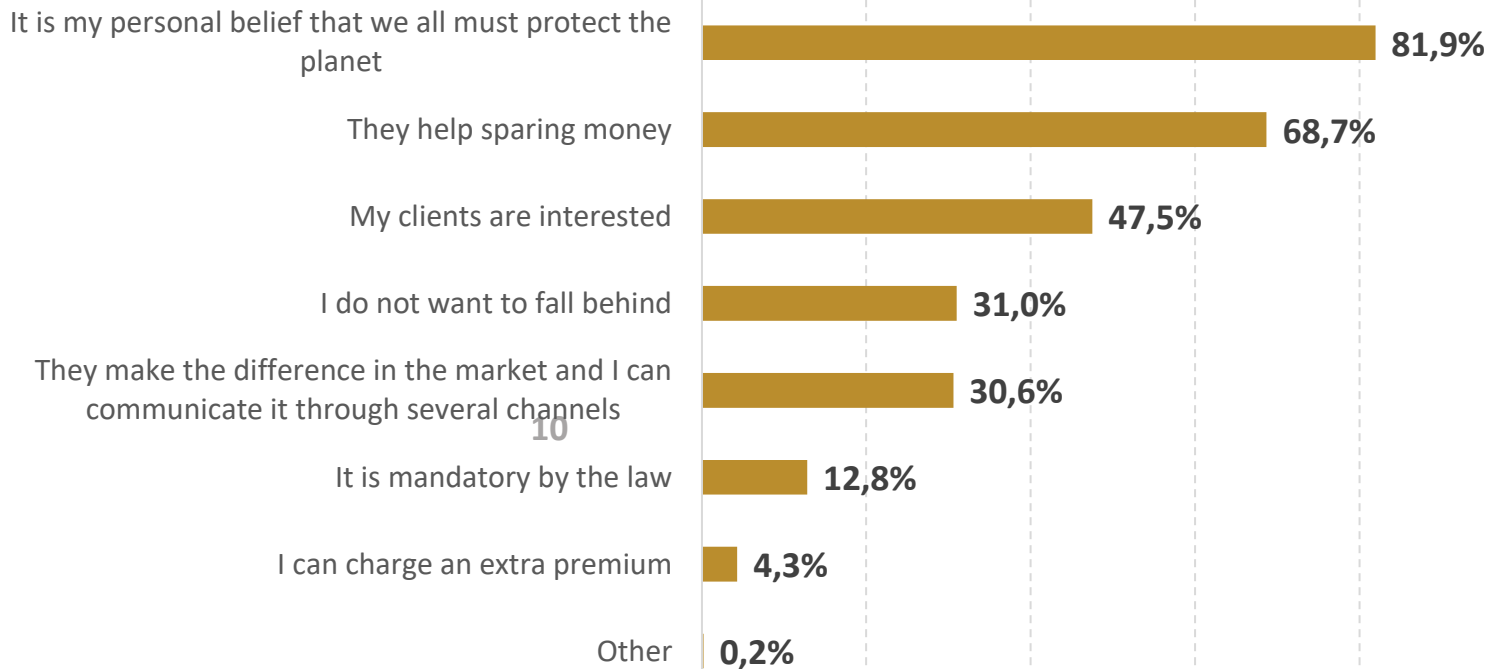
Some conclusions

- 76,3% of year-round operating hotels and 79,6% of seasonal hotels have or plan to implement sustainability practices.
- This ratio seems to be proportional to the category of the hotel, ranging from 67,8% for the 1-star hotels to 90,7% for the 5-star hotels.
- The same ratio applies in relevance to the hotel size, ranging from 76% for the very small, family hotels to 95,3% for the large hotels.
- The ratio for the mainland hotels amounts to 75,7%, while for hotels on the islands reaches 80,3%. Specifically, the ratio in the two main city destinations, Athens and Thessaloniki, and in popular islands exceeds 80%, while in other mainland destinations and in less popular islands is formed around 75%.
- Finally, on regional level, the lowest ration of hotels having or planning to implement sustainability practices are recorded in Attica, Epirus-Thessaly and in the Ionian Islands (around 70%).



Main reason for adopting sustainability practices*

Q: *Have you adopted or plan to adopt Sustainable Practices?*



It refers to **78%** of hotels that have or are planning to adopt sustainability practices

* *Multiple choice questions.*



Main reason for adopting sustainability practices

In addition to the belief that we should all protect the environment, of particular interest from a business perspective is the view of nearly 70% of hoteliers that **adopting sustainable practices helps save money.**

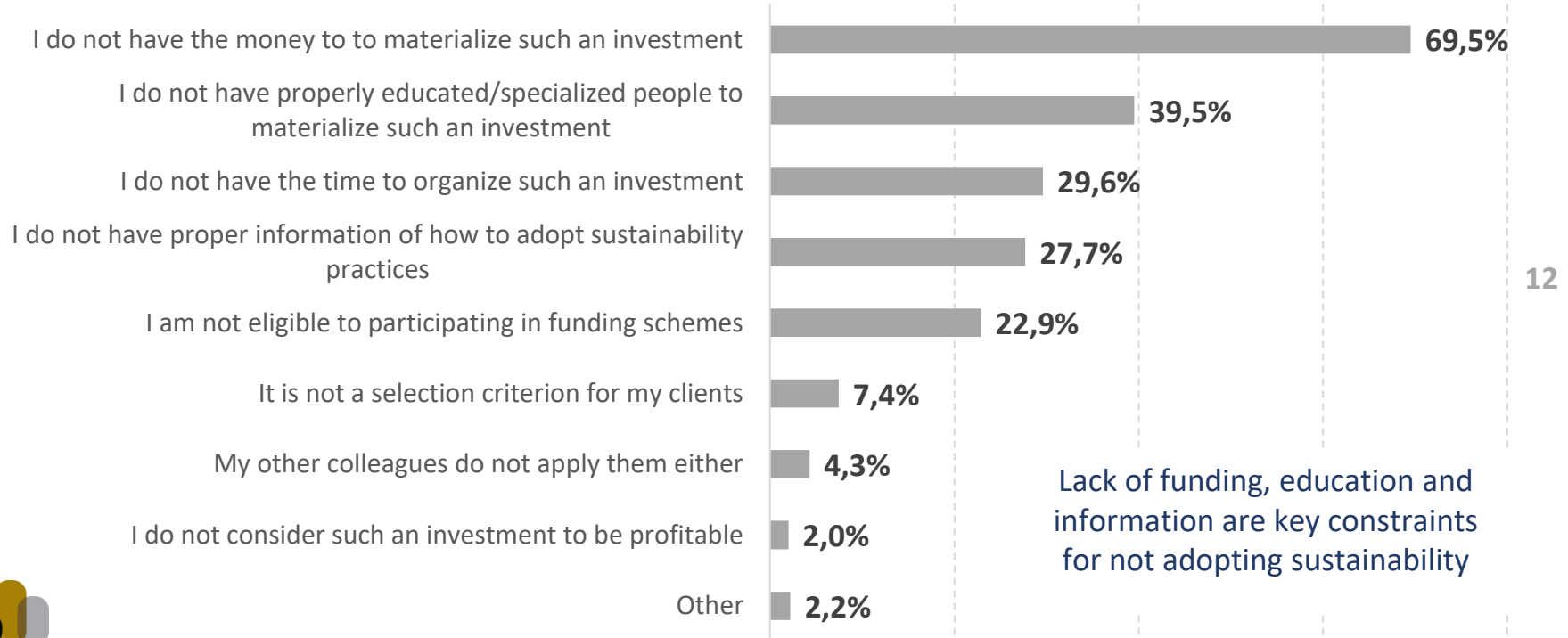


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Main reasons for NOT adopting sustainability practices*

Q: Please select the main reasons for not adopting Sustainable Practices



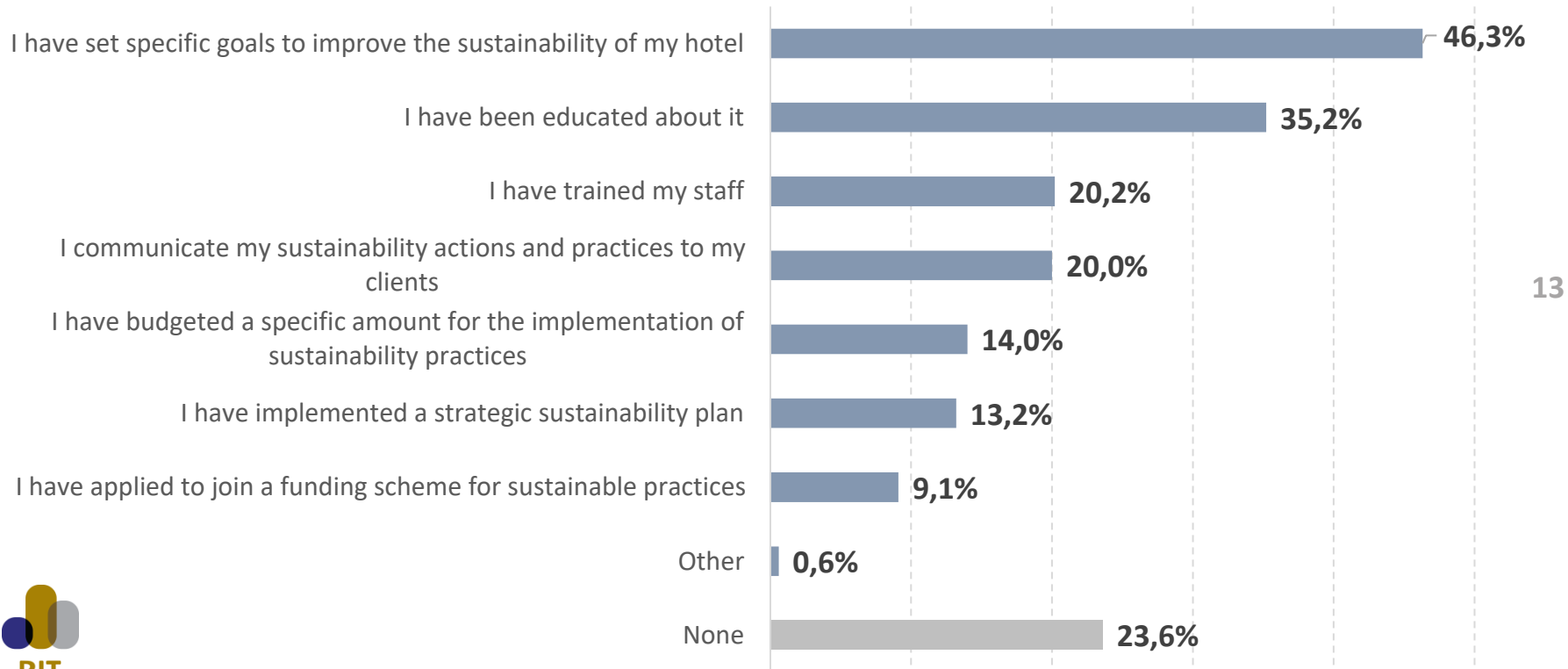
It refers to **22%** of hotels that DO NOT have or are NOT planning to adopt sustainability practices

* Multiple choice questions.



Strategy and Management: Actions to promote sustainability*

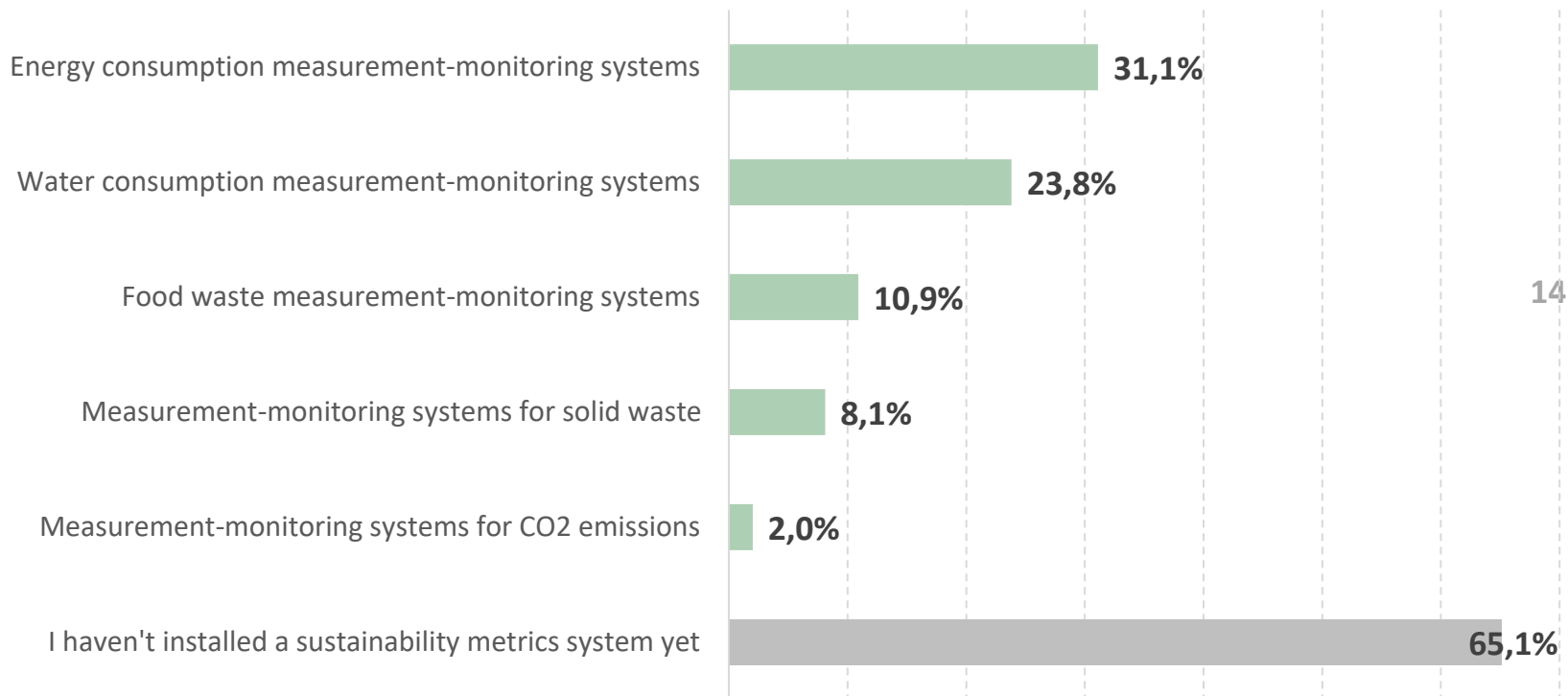
Q: *At the strategic and management level, what actions have you taken to promote sustainability in your hotel?*





Recording and Measuring of important hotel sustainability variables*

Q: *To measure and record important metrics for the sustainability of my hotel I have installed:*



* Multiple choice questions.



Recording and Measuring of important hotel sustainability variables



- It is noteworthy that 65% of hotels do not have systems to record and measure key sustainability metrics.
- Information on the possibilities and usefulness of adopting such practices is deemed necessary.



Recording and Measuring of important hotel sustainability variables

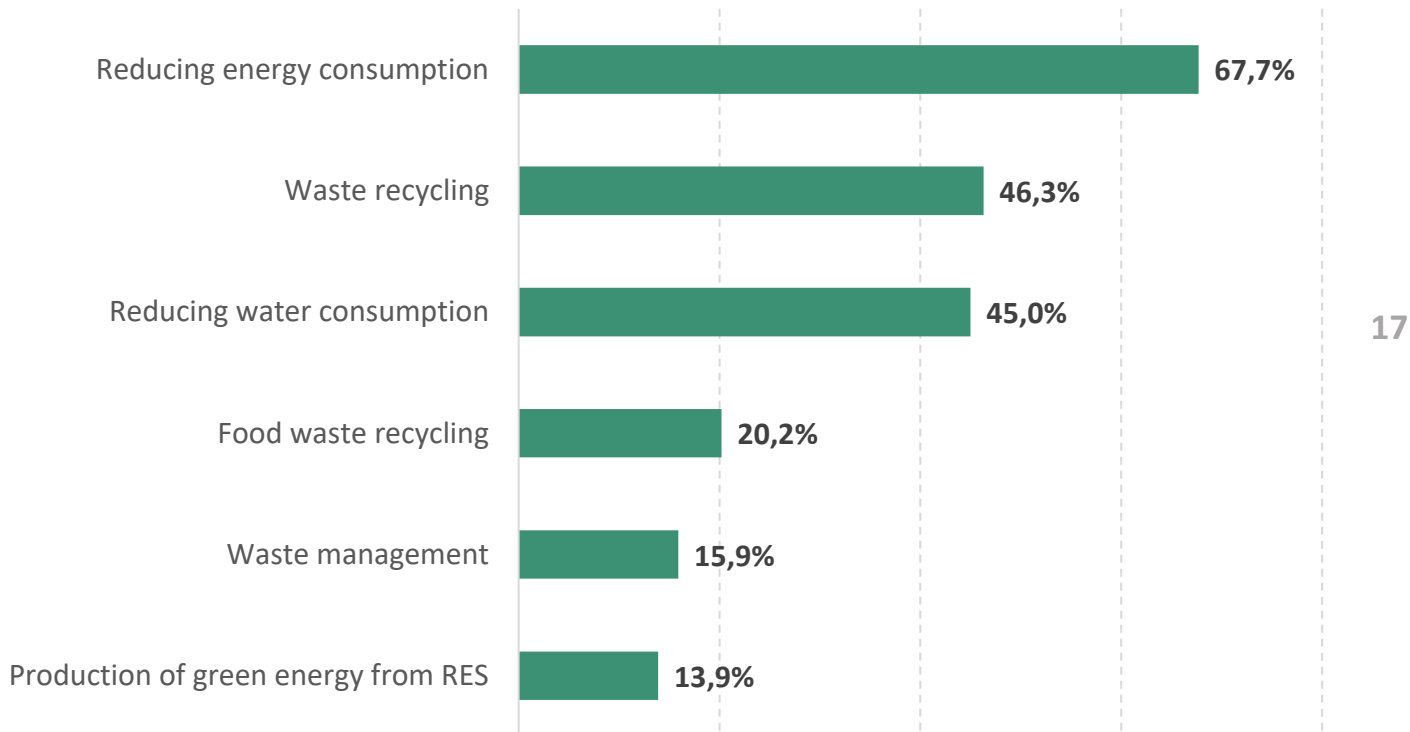
Some conclusions

- Seasonal hotels are way ahead of year-round hotels in installation of sustainability indices measuring systems.
- The higher ratios of hotels that have installed these measuring systems are recorded in:
 - large hotels,
 - hotels in Athens, Thessaloniki and popular islands,
 - hotels in Crete, South Aegean, Ionian Islands and Attica.



Hotel investments in sustainability practices*

Q: *I have invested in sustainable practices and adopted relevant actions to:*





Hotel investments in sustainability practices

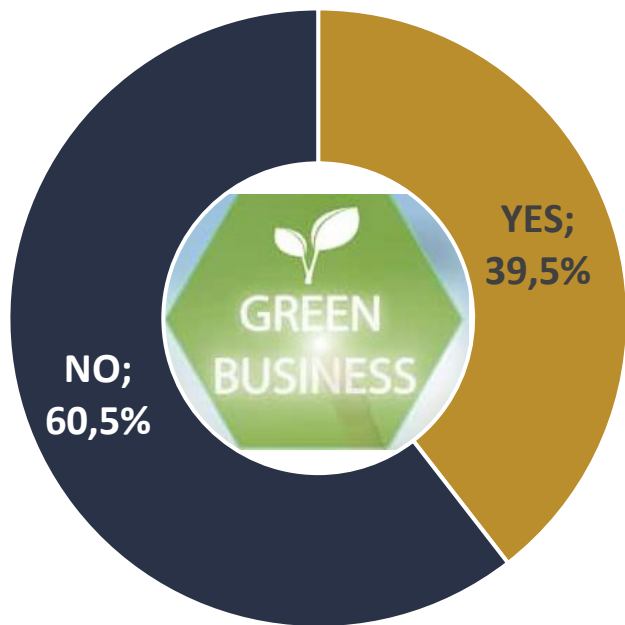
Some conclusions

- Investments on sustainability issues concern mainly energy consumption reduction (67,7%), waste recycling (46,3%) and water consumption reduction (45%).
- Seasonal hotels exhibit higher awareness on sustainability investments relatively to year-round hotels.
- The same pattern applies for high category hotels, for larger hotels, for hotels in popular islands and in capital cities (Athens, Thessaloniki).



Communication and promotion of sustainability practices implemented by hotels

Q: *If you implement sustainability actions, do you ensure that they are actively communicated and promoted?*



40%

of the hotels that implement sustainability practices communicates and projects them through various channels.

It is equally important to inform hoteliers about the usefulness and the way of promoting sustainability practices.

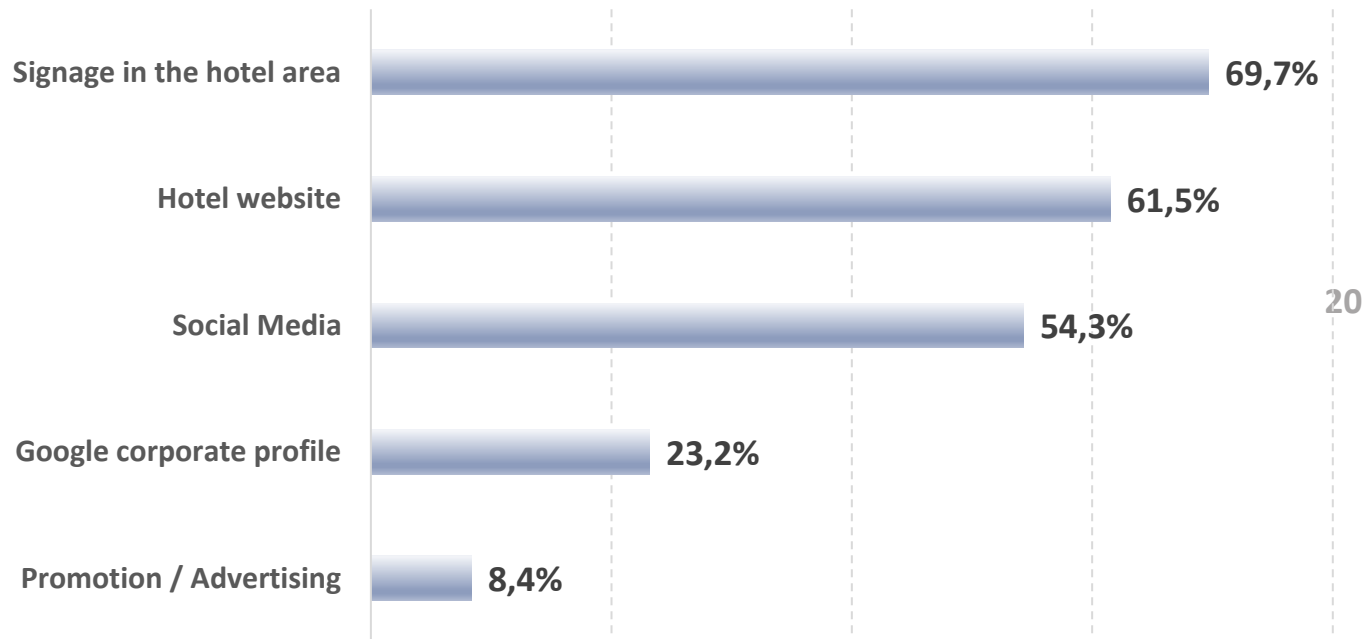
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Reference base: 70% of hotels that implement sustainability practices.



Communication and promotion channels of sustainability practices implemented by hotels*

Q: *Where do you communicate your sustainability actions?*



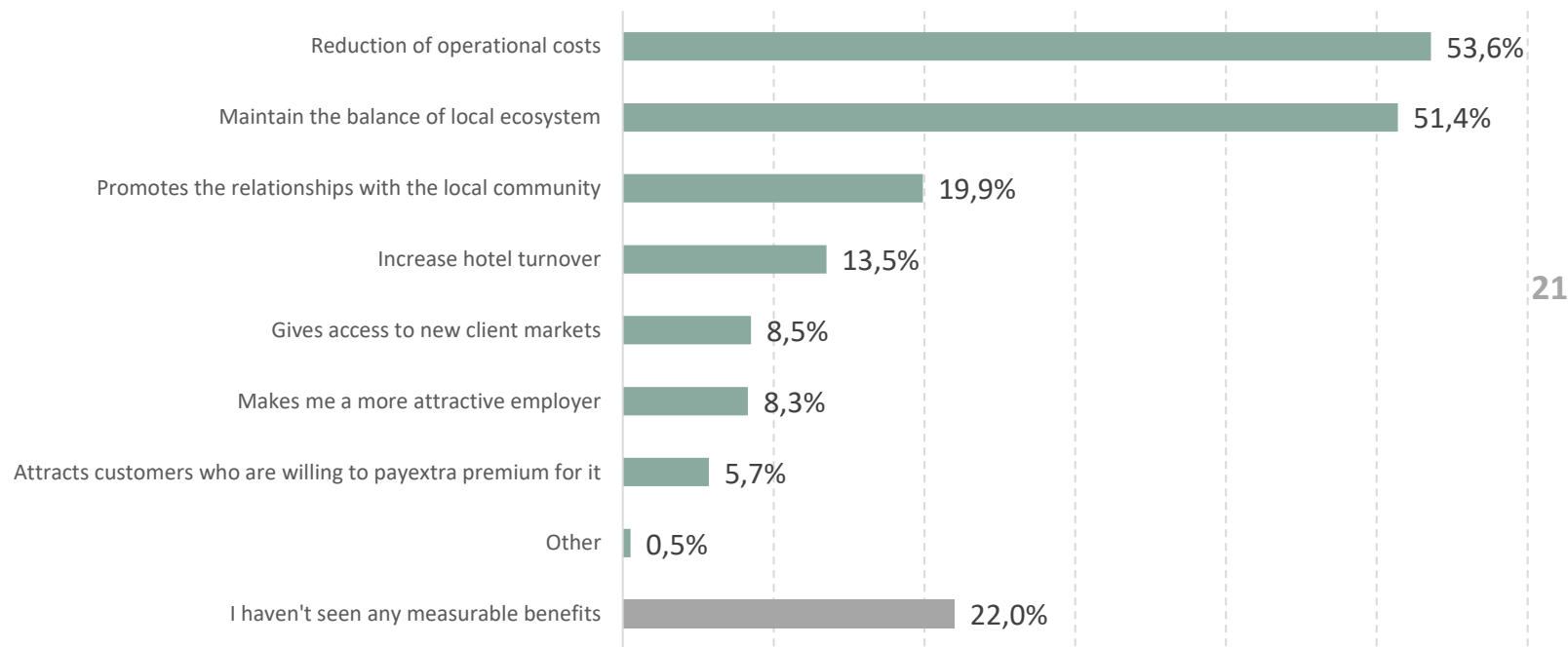
Reference base: 28% of hotels that communicate and promote their sustainability practices.

* Multiple choice questions.



Measurable benefits from implementing sustainability practices*

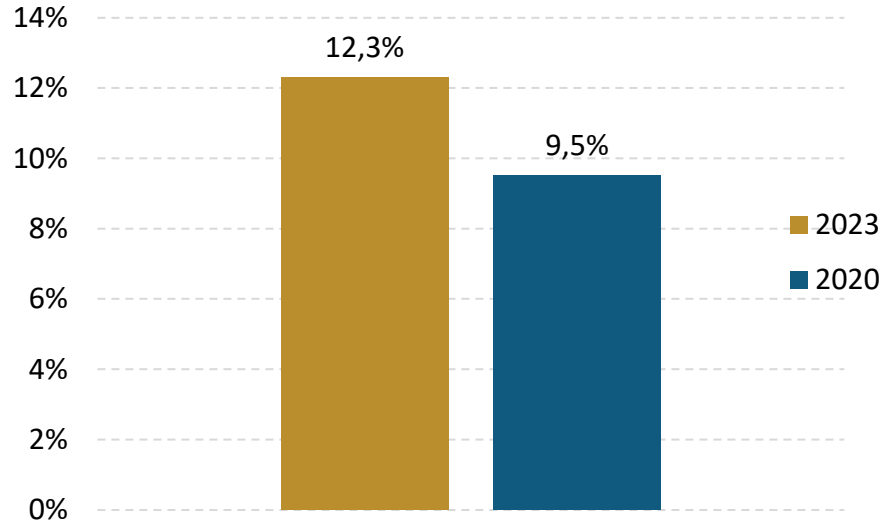
Q: *If you are implementing sustainability actions, have you seen measurable benefits?*





Possession of Certification regarding Environment–Energy–Sustainability

Q: Does your hotel have any kind of certification for Environment - Energy - Sustainability?

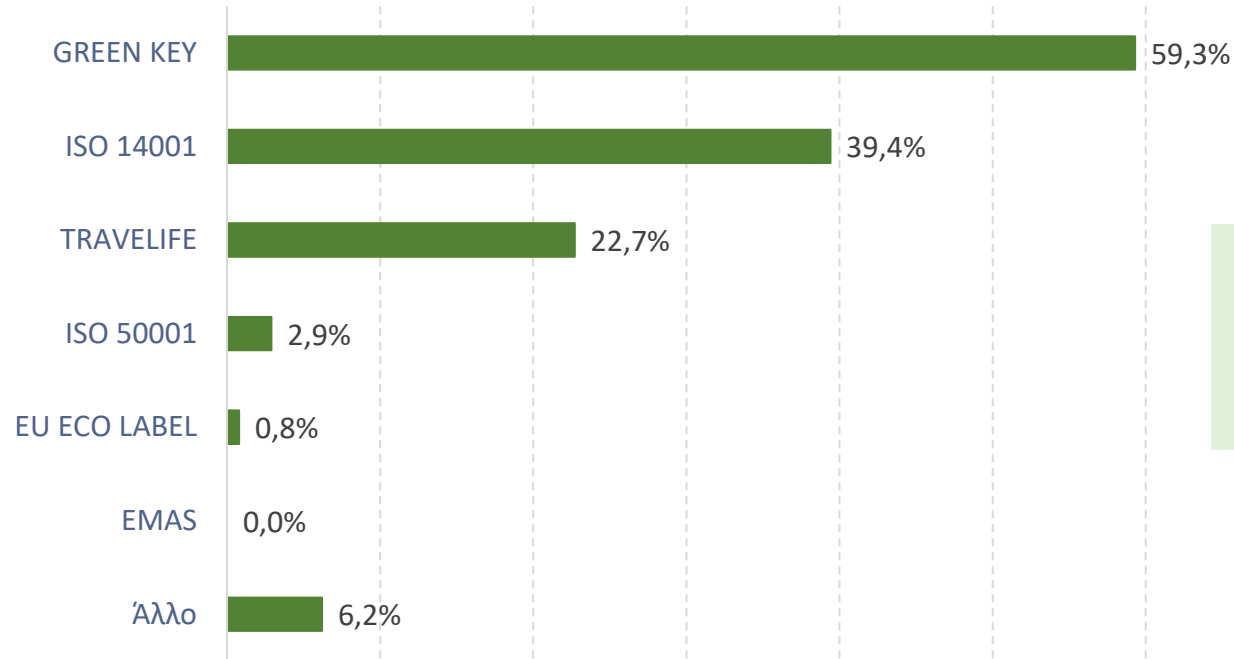


As of 2020, the ratio of hotels holding sustainability certifications increased by 3 percentage units, which is estimated to correspond to 350 hotel hotels, while the total number is estimated at 1300 hotels.



Types of Certification for Environment - Energy - Sustainability

Q: Which certification(s) does your hotel have?



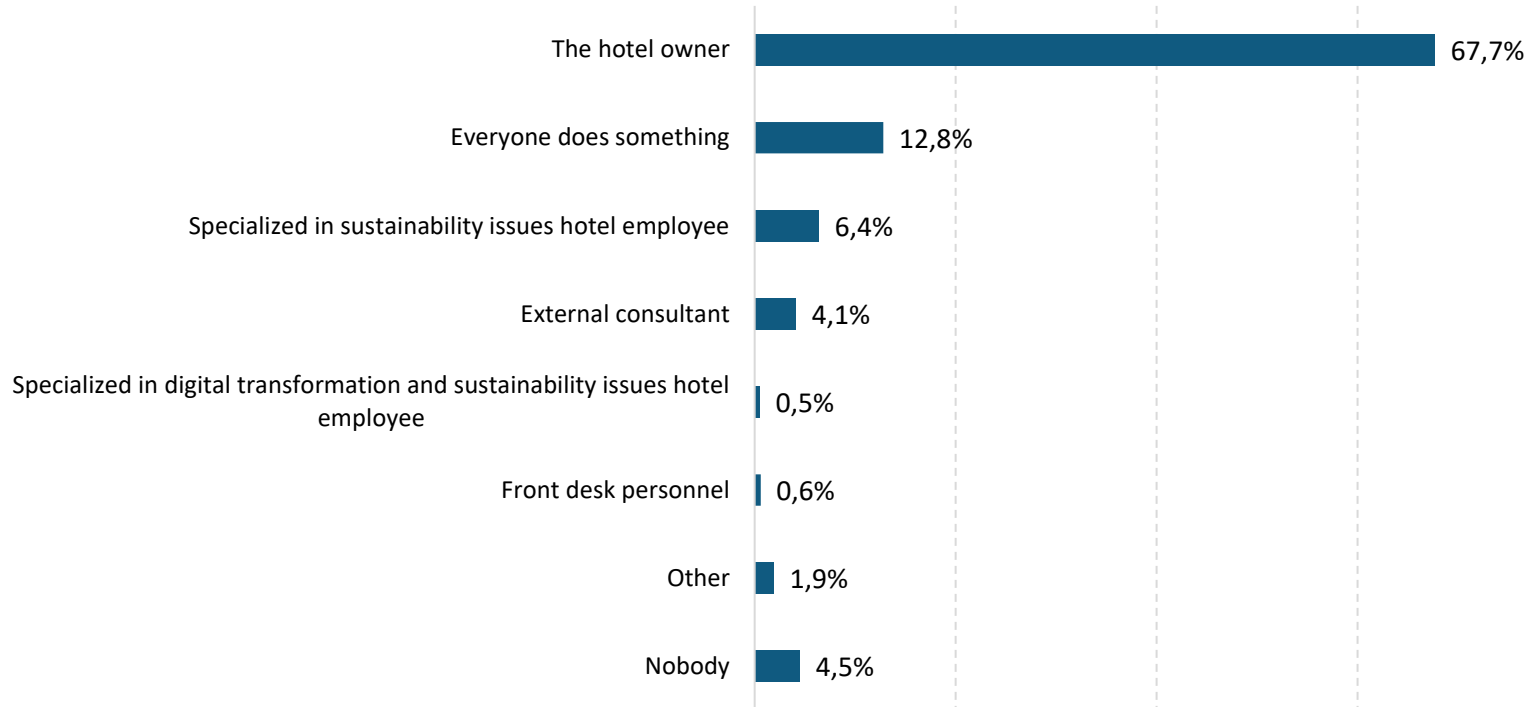
GREEN KEY
is the most popular
certification among
Greek hotels

Reference base: 12% of hotels already hold some kind of sustainability certification.



Who is responsible for sustainability issues?

Q: Who is responsible for sustainability issues in your hotel?

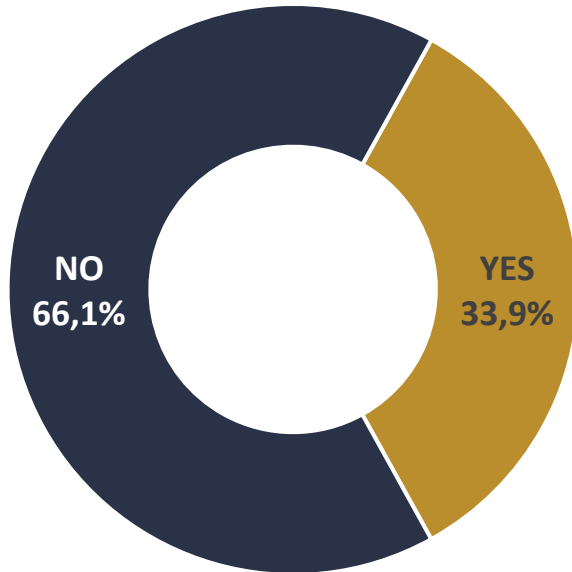


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Intention of creating a Sustainability Manager Position in the future

Q: Do you plan to create a position/role of Sustainability Officer in the future?



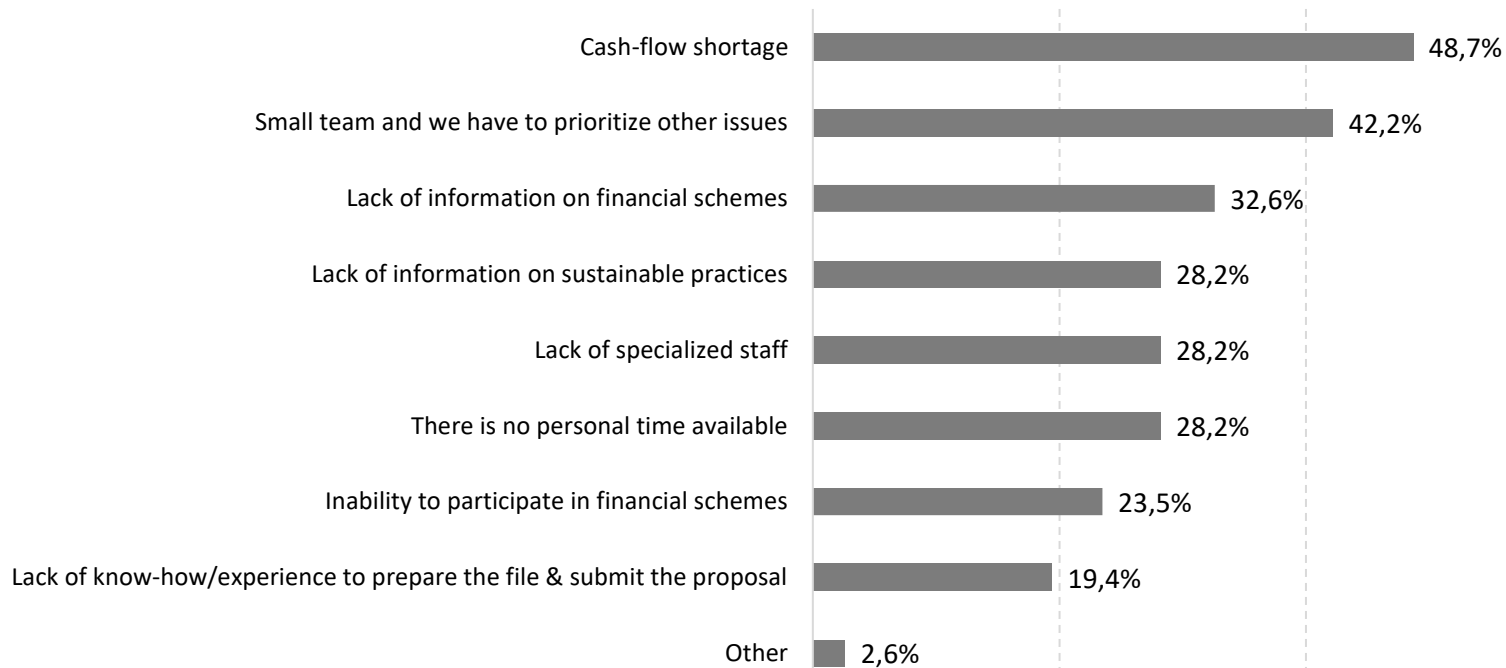
Of the hotels that do not have a Sustainability Manager position, **33.9%** intend to create a relevant position in the future

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Barriers to implementing Sustainability Practices

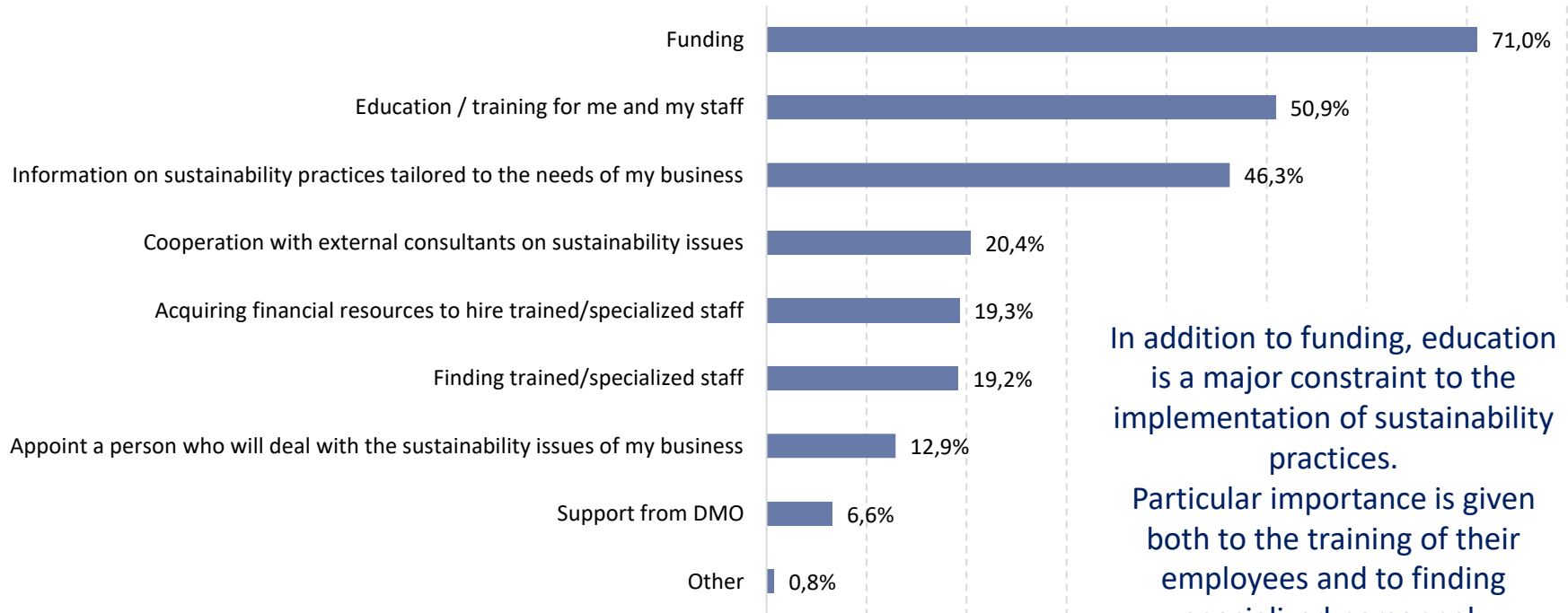
Q: What are the obstacles you face in implementing Sustainability Practices in your hotel?





Facilitations for implementation or expansion of Sustainability Practices in the hotel

Q: *What would help you to implement (and/or expand) Sustainability Practices in your hotel?*



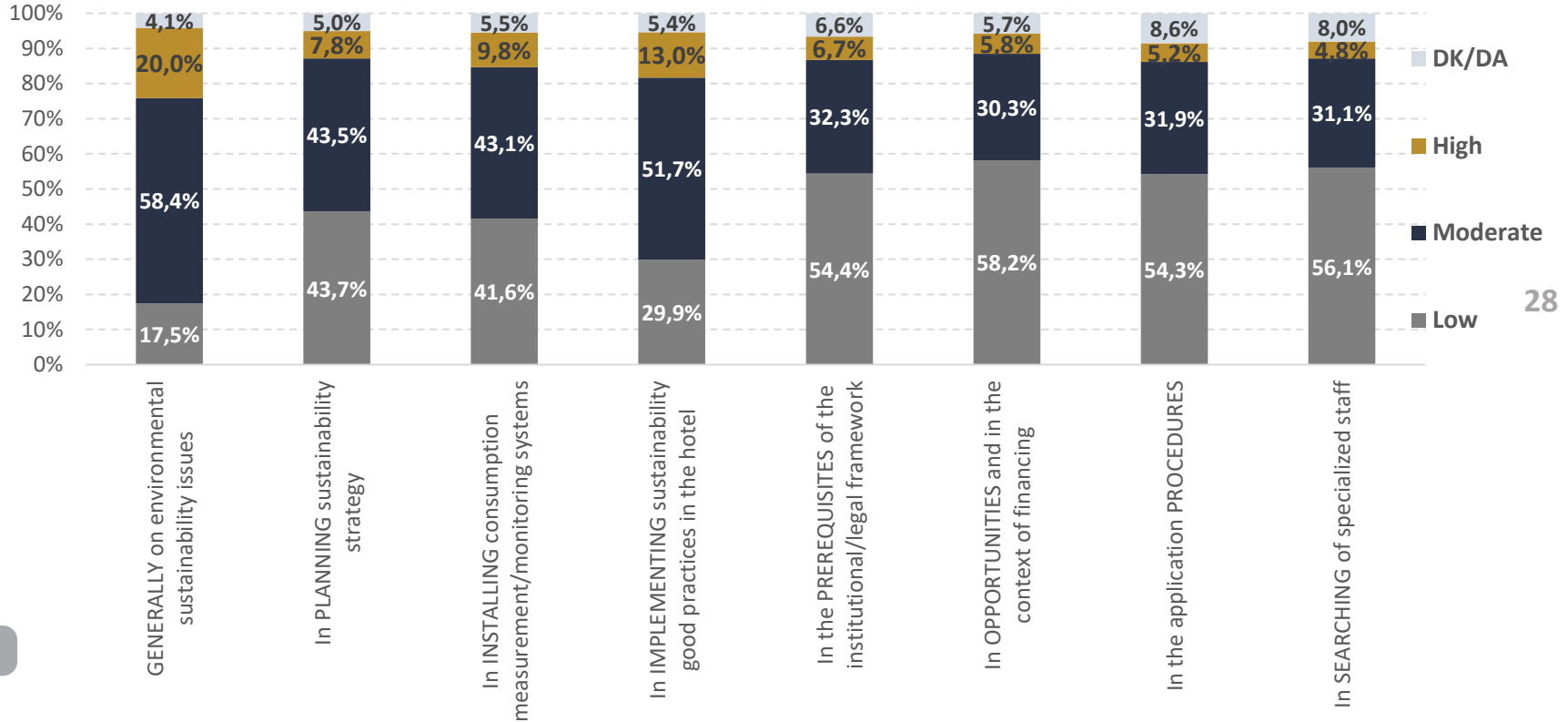
In addition to funding, education is a major constraint to the implementation of sustainability practices.

Particular importance is given both to the training of their employees and to finding specialized personnel.



Self-assessment of the level of knowledge regarding:

Q: How would you rate your level of knowledge about:





Some conclusions

regarding hoteliers' knowledge of sustainability issues:

- ❖ While almost **80%** of hoteliers consider themselves to have adequate or very good knowledge of environmental sustainability issues in **general**, there are significant variations in their knowledge on individual issues.
- ❖ The lowest rates are observed in finding qualified personnel and in the procedures for submitting funding applications.

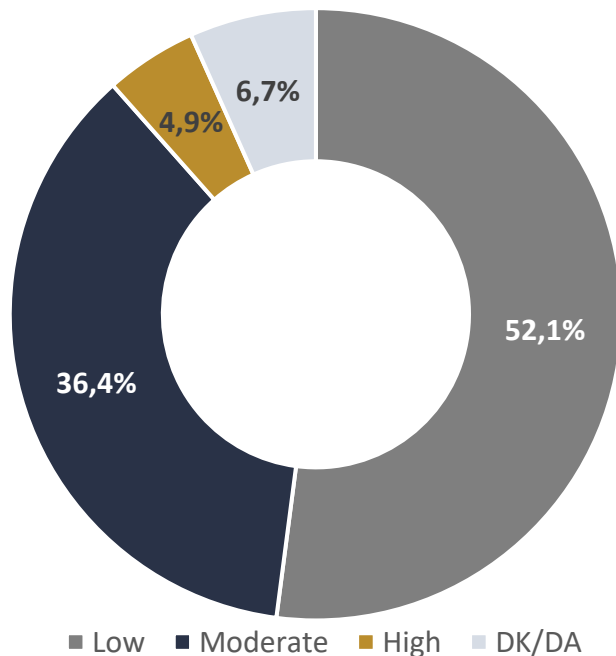




Evaluation of the level of knowledge of the Staff ...

... regarding the implementation of sustainability good practices in the hotel

Q: How would you assess the level of knowledge of your STAFF regarding the implementation of good sustainability practices in your hotel?



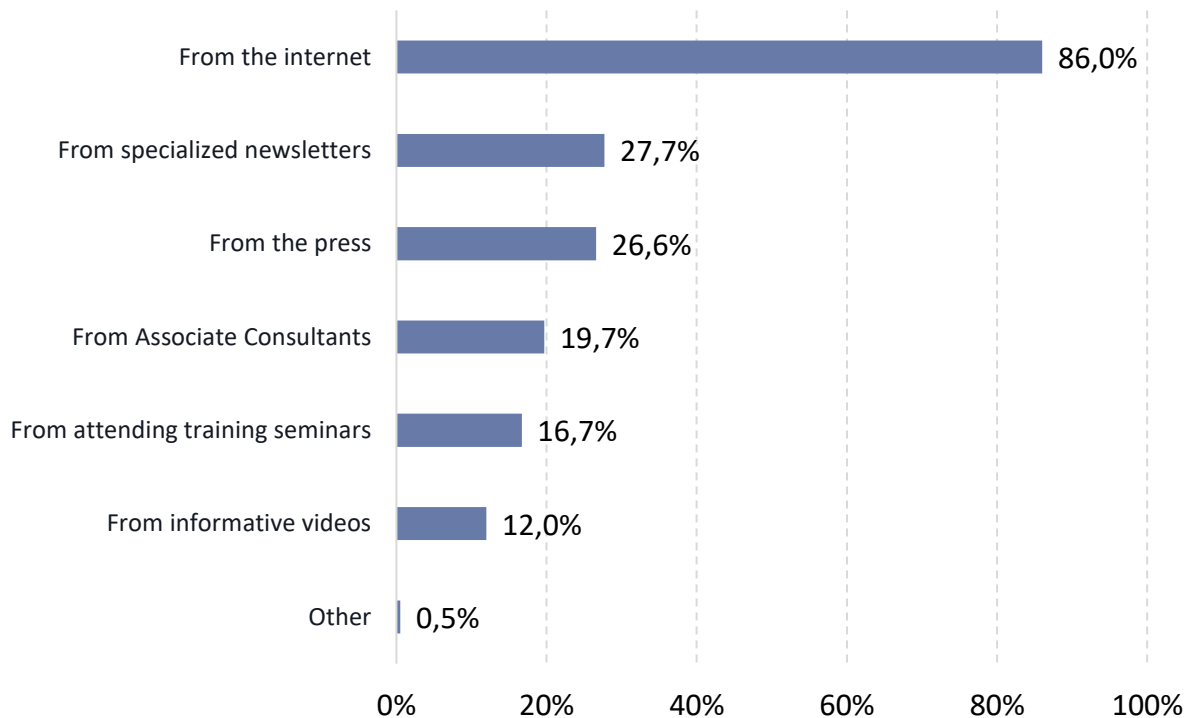
- ❖ The vast majority of hoteliers (89%) consider their staff's knowledge on sustainability issues as low to moderate.
- ❖ There appears to be a need to train hotel staff on the implementation of sustainability good practices.

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Sources of information on current developments regarding sustainability practices in the hospitality industry*

Q: *How do you keep up to date with current developments on sustainability in the tourism sector?*

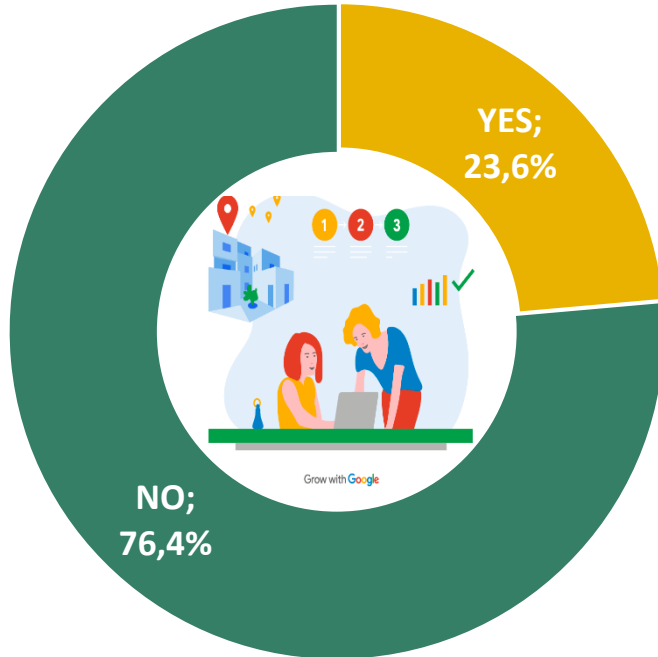


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"Grow Greece with Google"

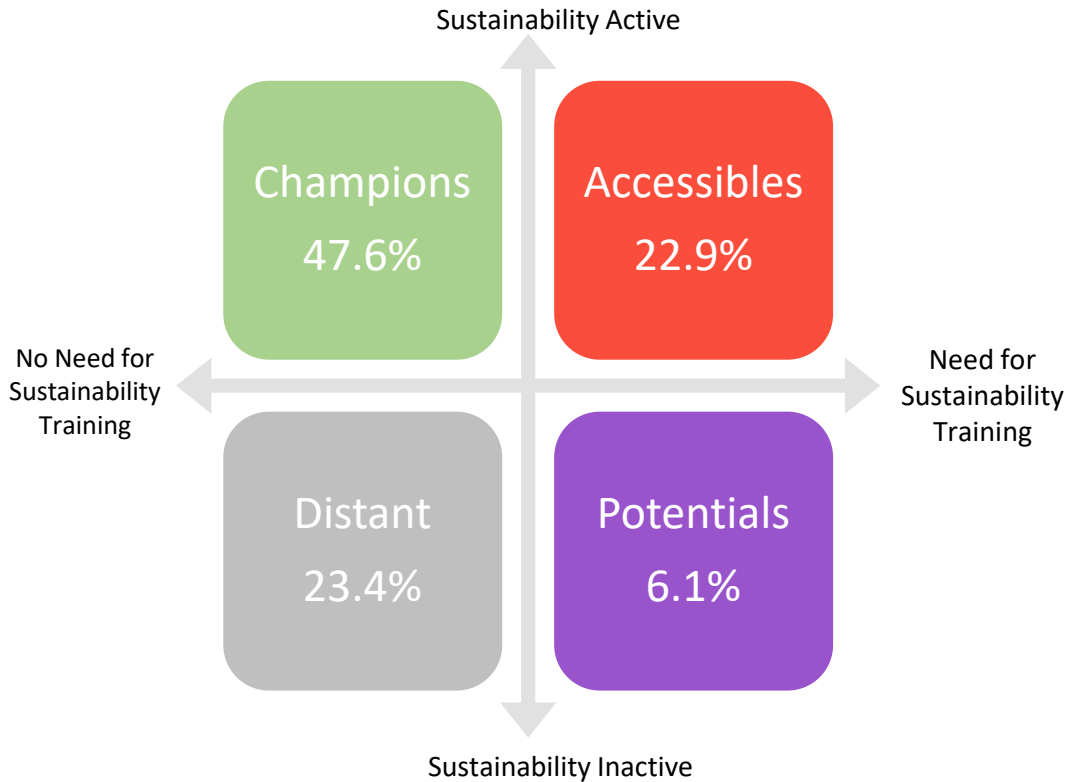
Q: *Are you aware of the free training seminars offered by Google on sustainability issues as part of the "Grow Greece with Google" training program?*



24% of hoteliers know about Google's free sustainability training courses as part of the training program **"Grow Greece with Google"**.



Hotels Segmentation on Sustainability Seminars Interest



Accessibles: The most positive inclined segment towards sustainability training seminars, accounting for 22.9% of hotels population. They have adopted sustainability practices but still recognize low employees' expertise on sustainability issues thus requiring for further employees training. Nearly ¼ are aware of Google's seminars on sustainability and 75% are interested in certificate acquisition.

Potentials: The 2nd most positive inclined segment towards sustainability training seminars, accounting for 6.1% of hotels population. They have NOT adopted sustainability practices as they exhibit minimum know how. Only 4% are aware of Google's seminars on sustainability BUT 71% are interested in certificate acquisition.

Champions: The most 'mature' segment, accounting for nearly 50% of hotels population. They have adopted sustainability practices and do not consider employees expertise as a barrier for further implementations. 1/3 are aware of Google's seminars and 66% report interest for certificate acquisition.

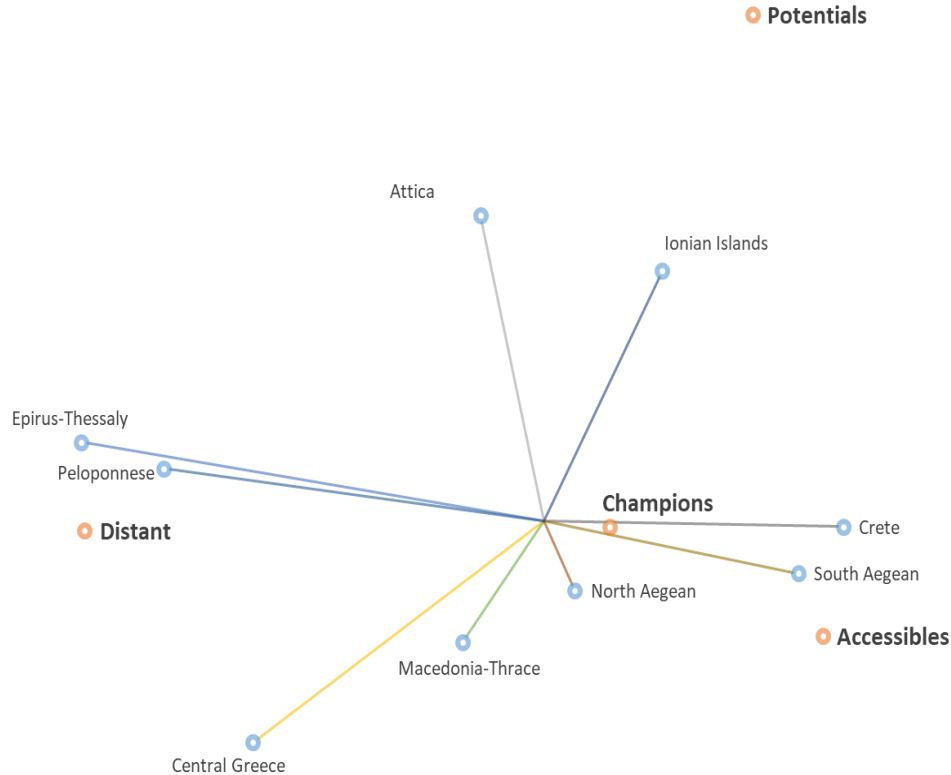
Distant: The majority of the 'Distant' are not interest to adopt sustainability practices and those who do, are not reporting employees training as a prerequisite. 15% of the 'Distant' are aware of Google's seminars but less than 50% express interest on certificate acquisition.

Need for Sustainability Training: Those reporting as an obstacle for implementing sustainability practices the lack of expert employees and/or the lack of know how / experience on proposal submission. Also, they should report employees' education and/or hiring specialists as a means to deploy sustainability practices.

Sustainability Active: Those currently implementing sustainability practices.

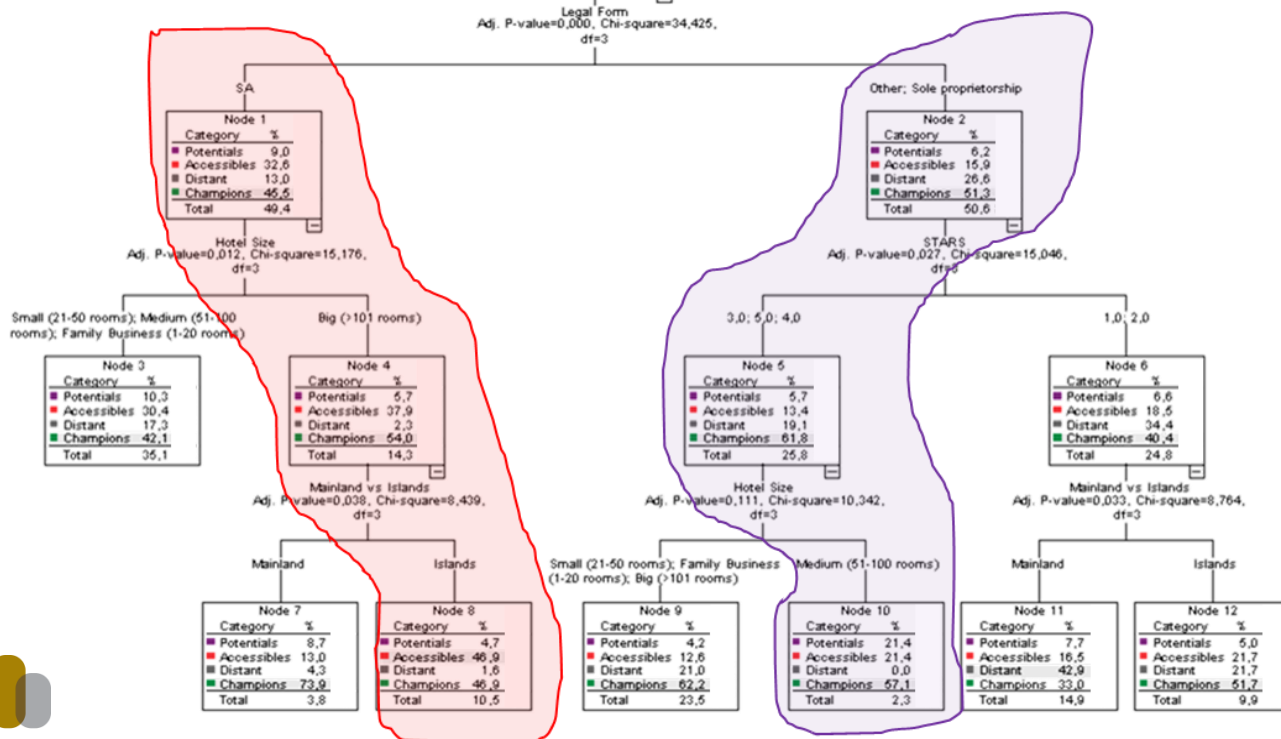


Segments Regional Allocation



The '**accessibles**' exhibit higher incidence rate in Crete, Ionian & Aegean islands. The '**Champions**' have a similar regional profile but into a lesser extent. The '**Potentials**' are more likely to be found in major urban areas of Attica and Ionian Islands, while the '**Distants**' are detected to the more distant mainland areas (Epirus, Thessaly, Peloponnese and Macedonia-Thrace).

Node 0	
Category	%
Potentials	6.1
Accessibles	22.9
Distant	23.4
Champions	47.6
Total	100.0



Accessibles: The 'accessibles' detection is maximized within SA companies of more than 100 rooms in island areas where the respective incidence rate for the 'accessibles' is 46.9% (population: 24.1%). The total population of the aforementioned 'route' is approximately 1.000 hotels whereas the 'accessibles' hotels are nearly 500.

Potentials: The 'potentials' detection is maximized within non SA companies of more than 2** class category and medium sized entities (51-100 rooms) where the respective incidence rate for the 'potentials' is 21.4% (population: 7.6%). The total population of the aforementioned 'route' is quite small though it is maximizing the 'potentials detection' (approx. 200 hotels whereas the 'potentials' hotels are nearly 40).



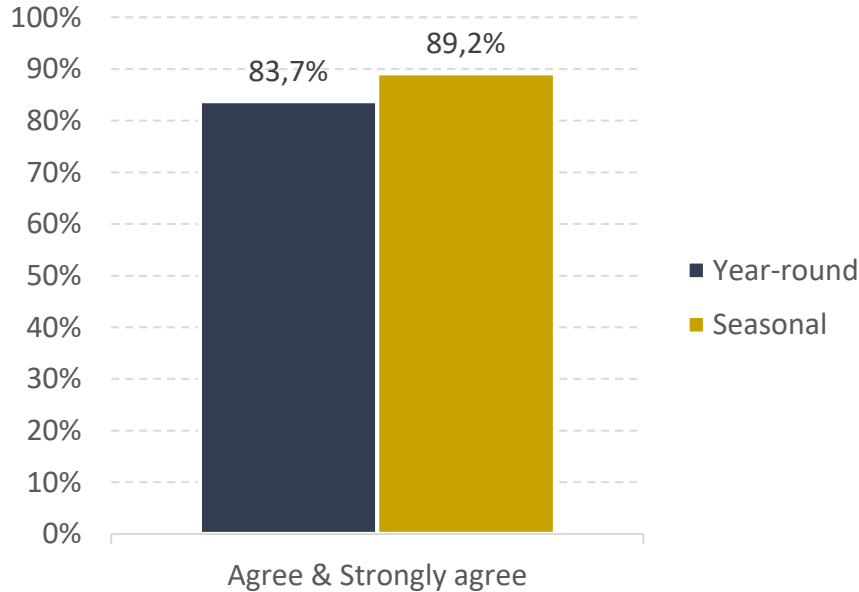
02

Analysis based on hotel operation

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Importance of sustainability practices for the hotel operation, 2023 by hotel operation



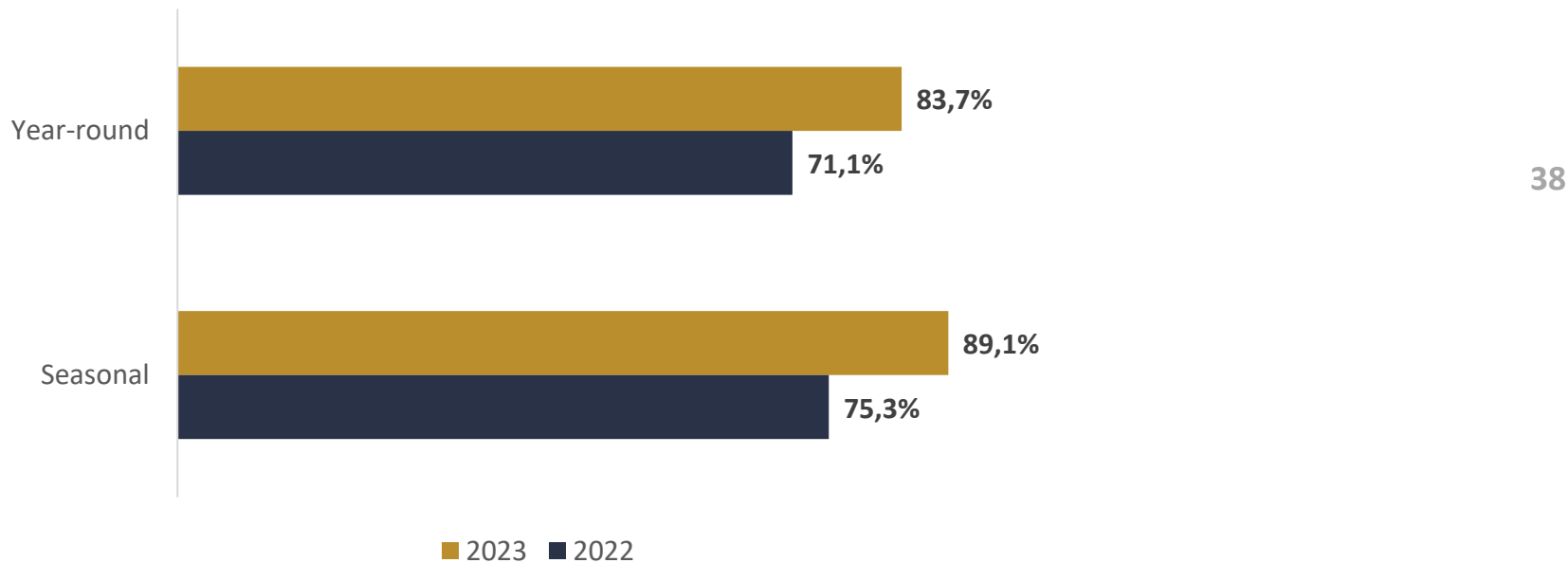
The majority of the respondents (**87%**) consider that the adoption of sustainability practices is very important for the future of their hotel enterprise. However, the relative ratio for the **year-round hotels is 84%**, while for the **seasonal reaches 89%**.



Importance of sustainability practices for the hotel operation, 2023 vs 2022, by operation

«Agree & Strongly agree»

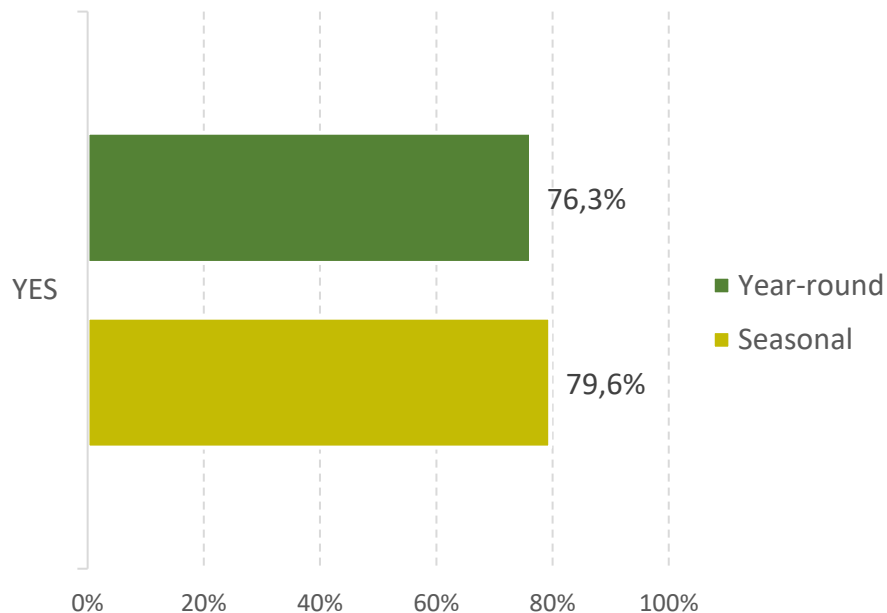
Comparative presentation of respondents



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Hotels that have or plan to implement sustainability practices, by operation



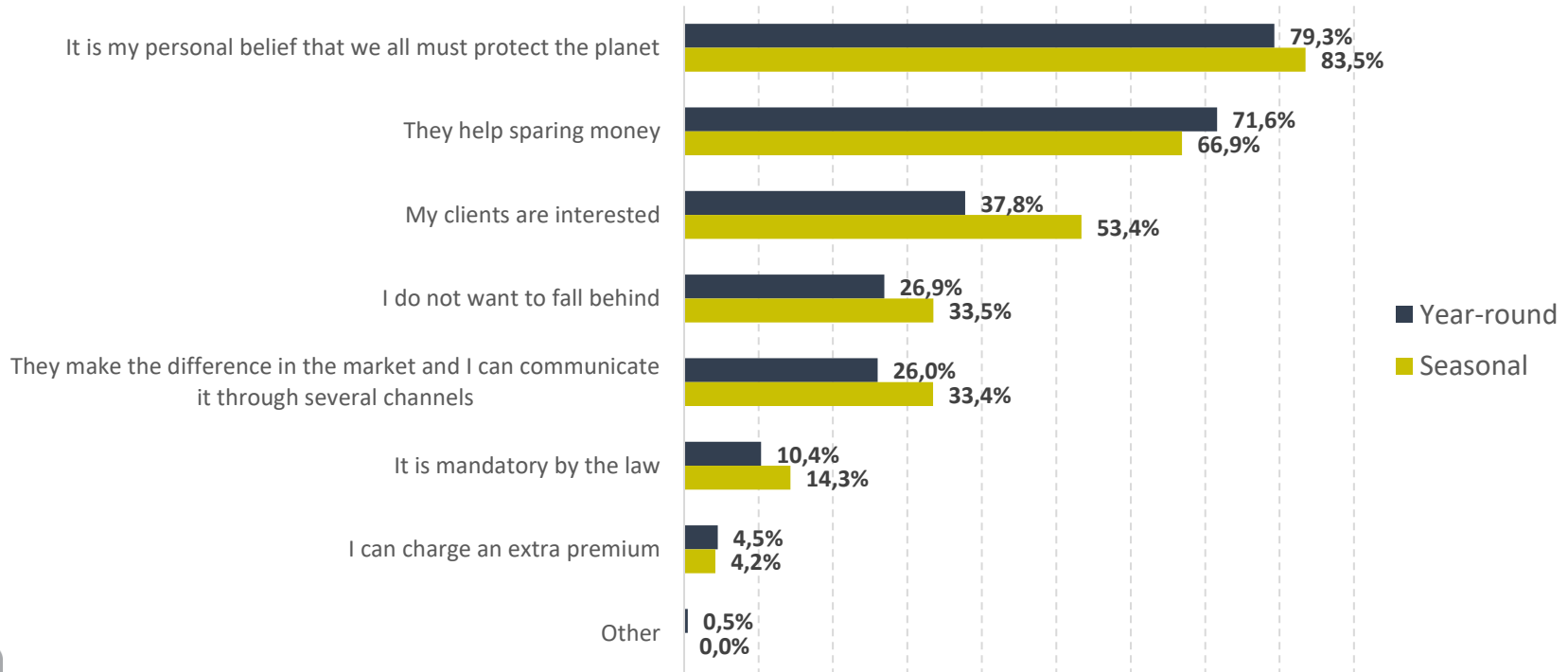
76% of year-round hotels have or intend to implement sustainable practices. The corresponding ratio for seasonal hotels is almost **80%**.





Main reason for adopting sustainability practices*

It refers to **78%** of hotels that have or are planning to adopt sustainability practices



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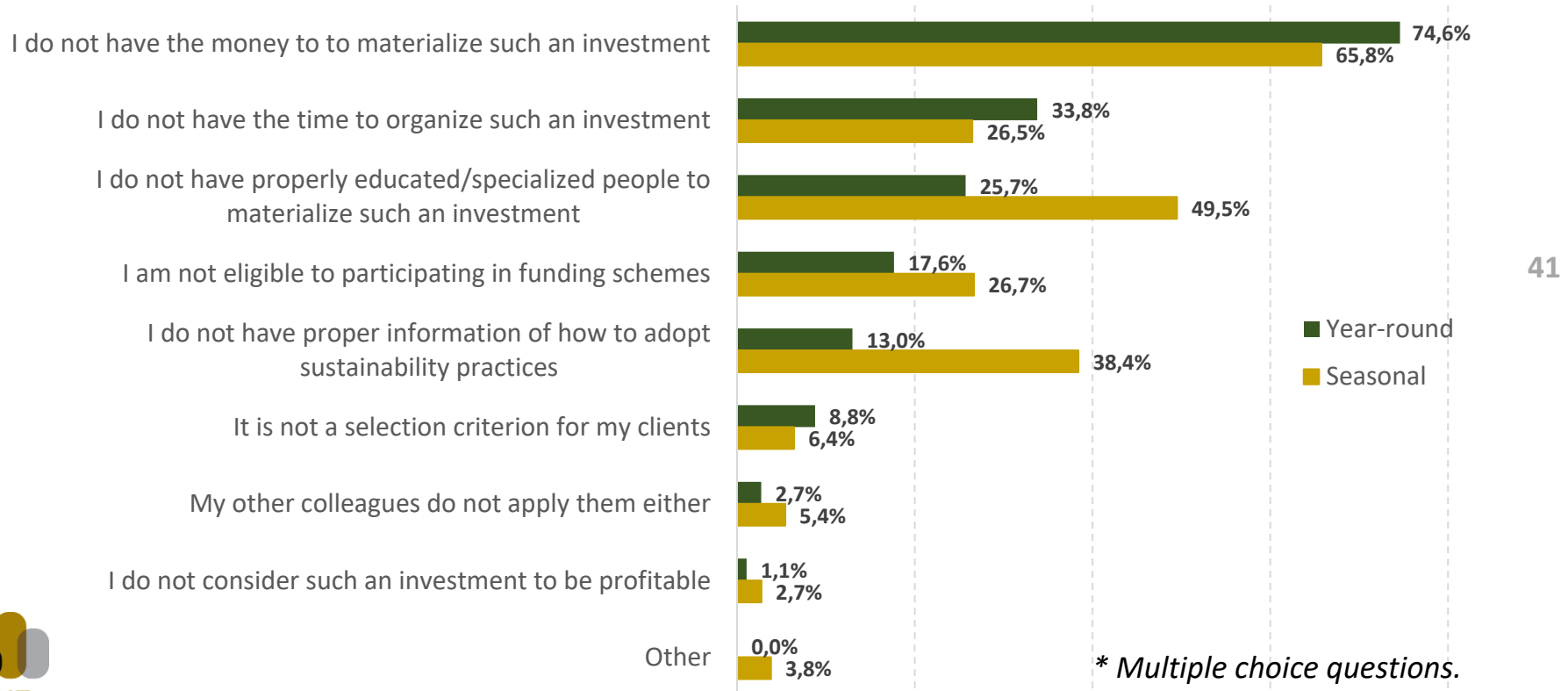
■ Year-round
■ Seasonal

* Multiple choice questions.



Main reason for NOT adopting sustainability practices*

It refers to **22%** of hotels that DO NOT have or are NOT planning to adopt sustainability practices





Main reason for NOT adopting sustainability practices

Some conclusions

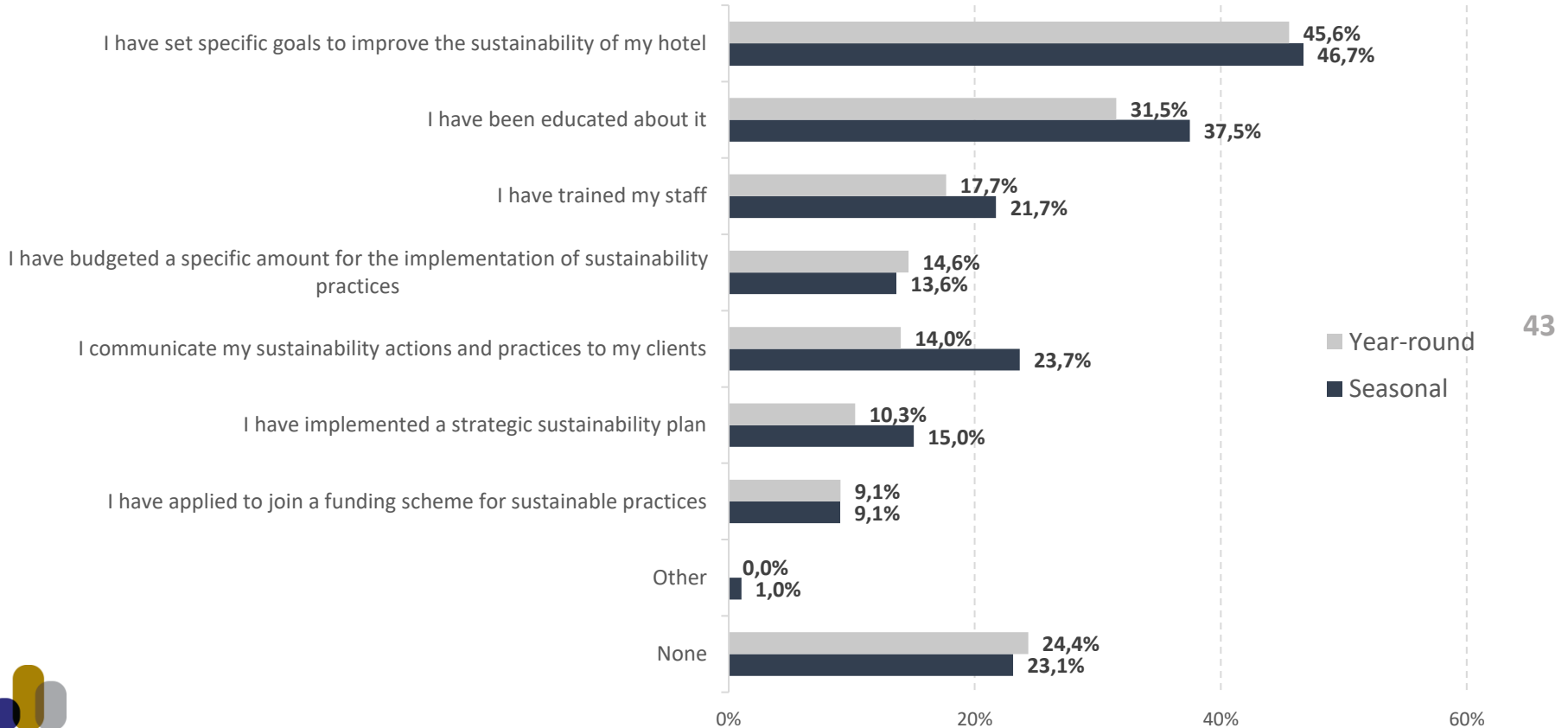


Lack of funding is the main reason for **not** adopting sustainability practices. In seasonally operating hotels, the inability to participate in financial schemes is more intense.

Apart from funding resources and opportunities, seasonal hotels face on one hand the lack of properly educated and/or specialized persons that would guide them in implementing sustainability practices and on the other hand the lack of proper information on how to adopt these practices.



Strategy and Management: Actions to promote sustainability, by operation*



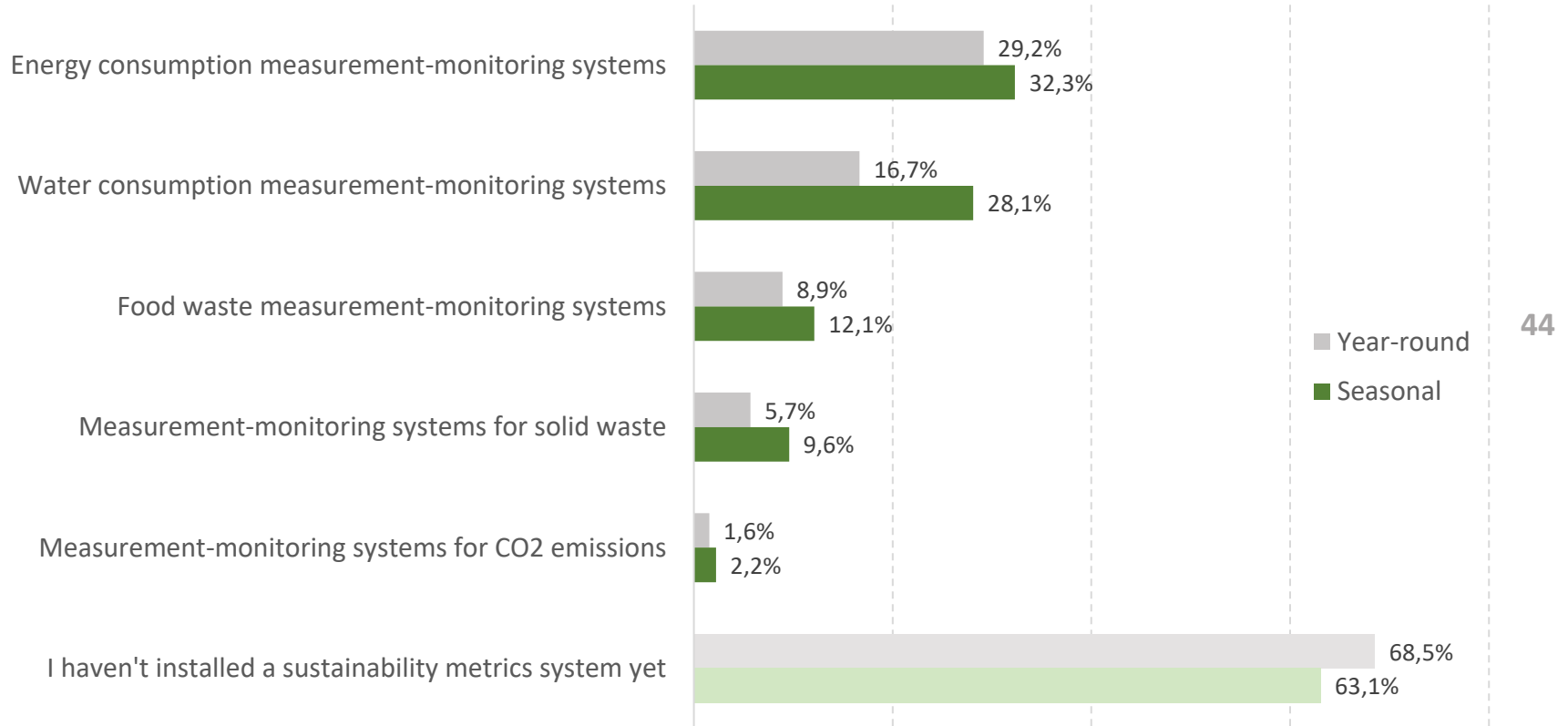
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■ Year-round
■ Seasonal

* Multiple choice questions.



Recording and Measuring of important hotel sustainability variables, by operation*



* Multiple choice questions.



Recording and Measuring of important hotel sustainability variables

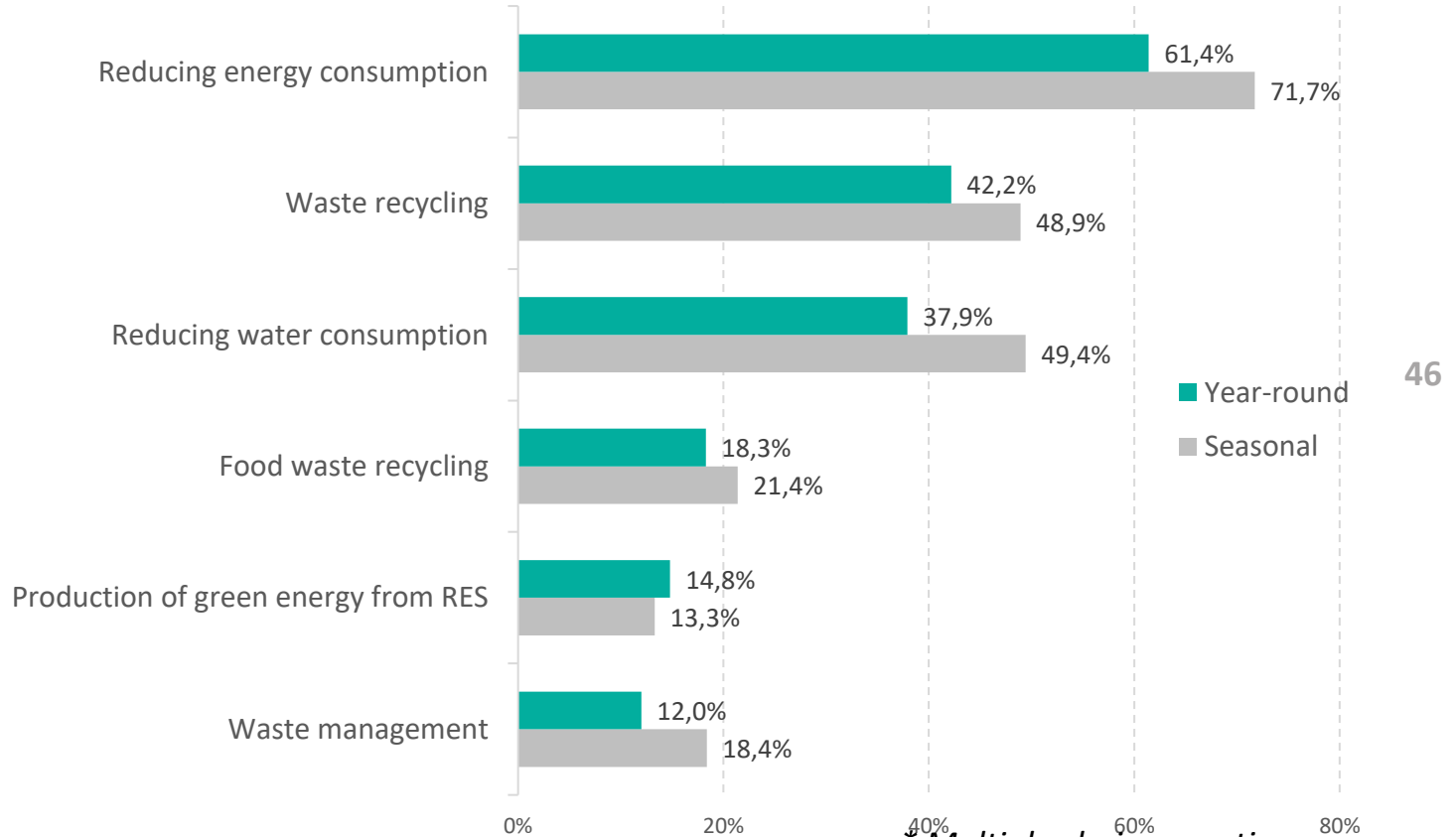
Some conclusions



- Seasonal hotels have a clear lead in installing monitoring and measuring systems of the main sustainability magnitudes.
- However, information on the possibilities and usefulness of installing monitoring and measuring systems is deemed necessary, since **69% of year-round** hotels and **63% of seasonal** hotels have not yet installed any such systems.



Hotel investments in sustainability practices*



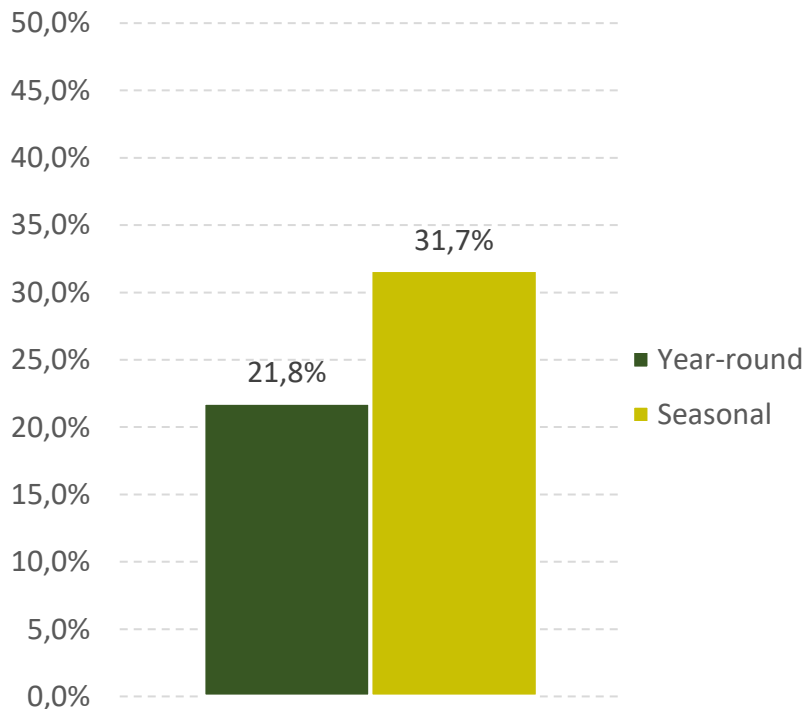
* Multiple choice questions.

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Communication and promotion of sustainability actions implemented by hotels, by operation

Reference base: 70% of hotels that implement sustainability actions.



From the hotels that implement sustainability actions 21,8% of year-round hotels and 31,7% of seasonal ones communicates and promotes them through various channels.

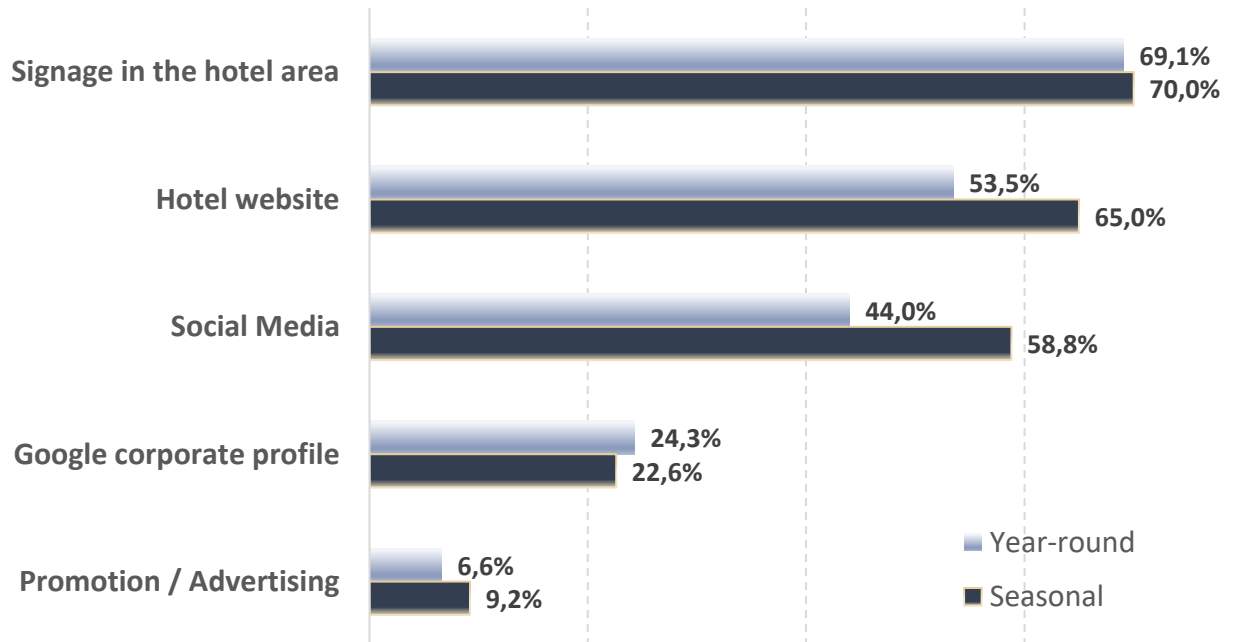
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It is equally important to inform hoteliers about the usefulness and the ways of promoting sustainability actions, since the knowledge levels of these two hotel categories are subject to great improvements.



Communication and promotion channels of sustainability actions implemented by hotels, by operation*

Reference base: 28% of hotels that communicate and promote their sustainability actions.



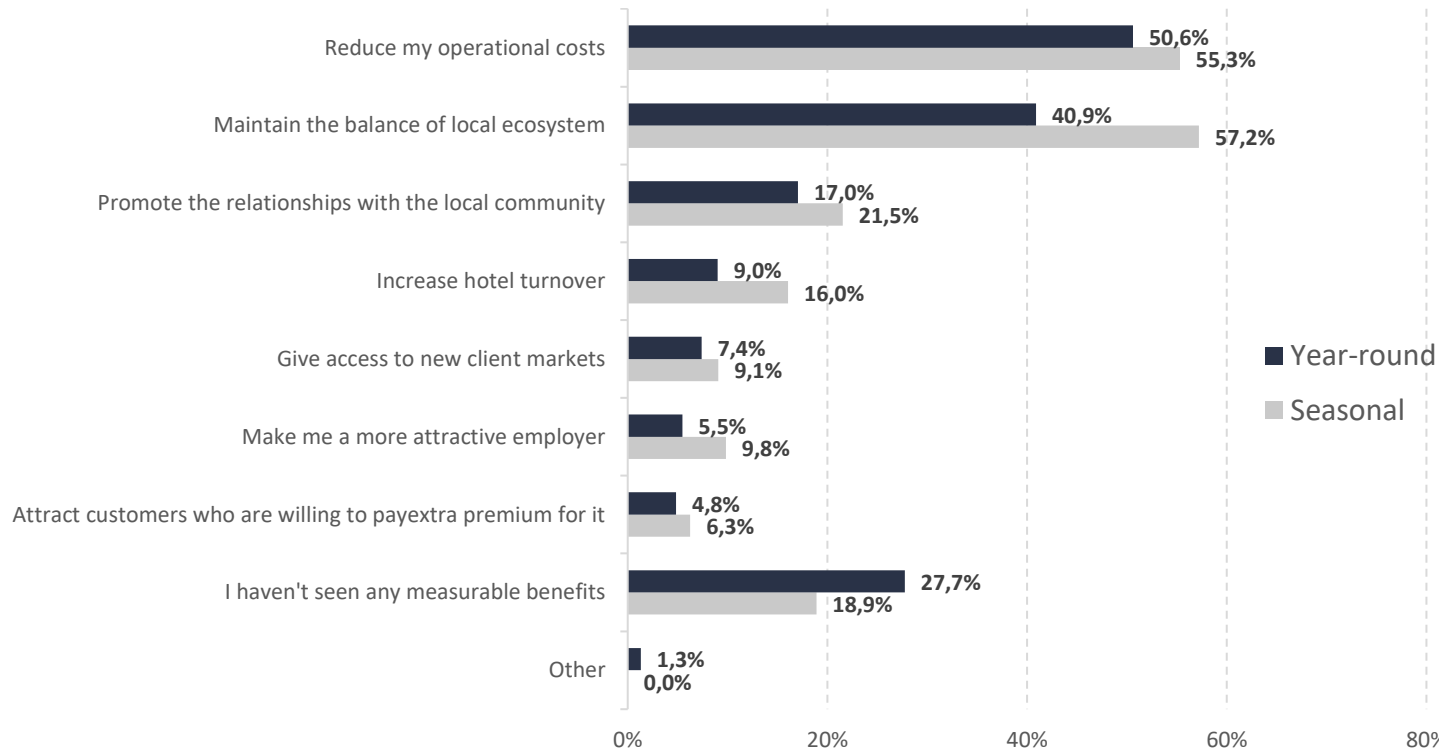
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* Multiple choice questions.



Measurable benefits from implementing sustainability actions, by operation*

Reference base: 70% of hotels that implement sustainability actions.

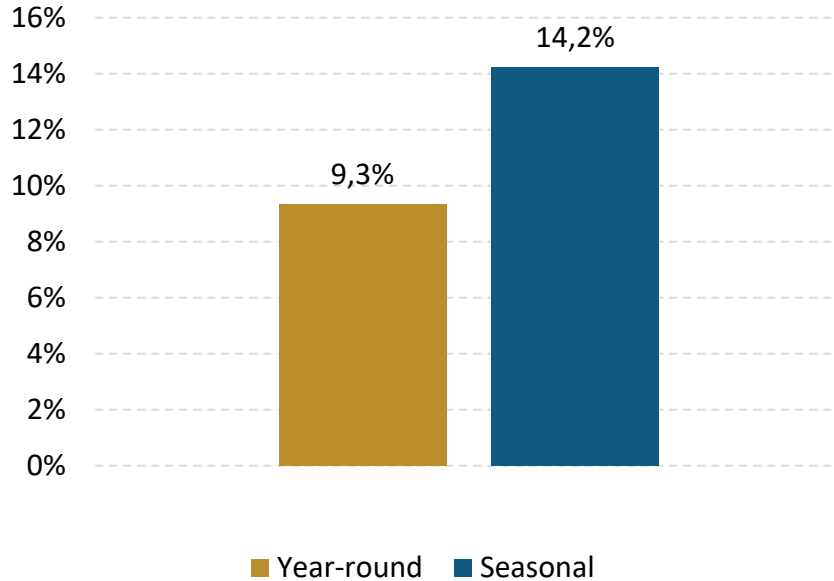


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* Multiple choice questions.



Possession of Certification regarding Environment–Energy–Sustainability

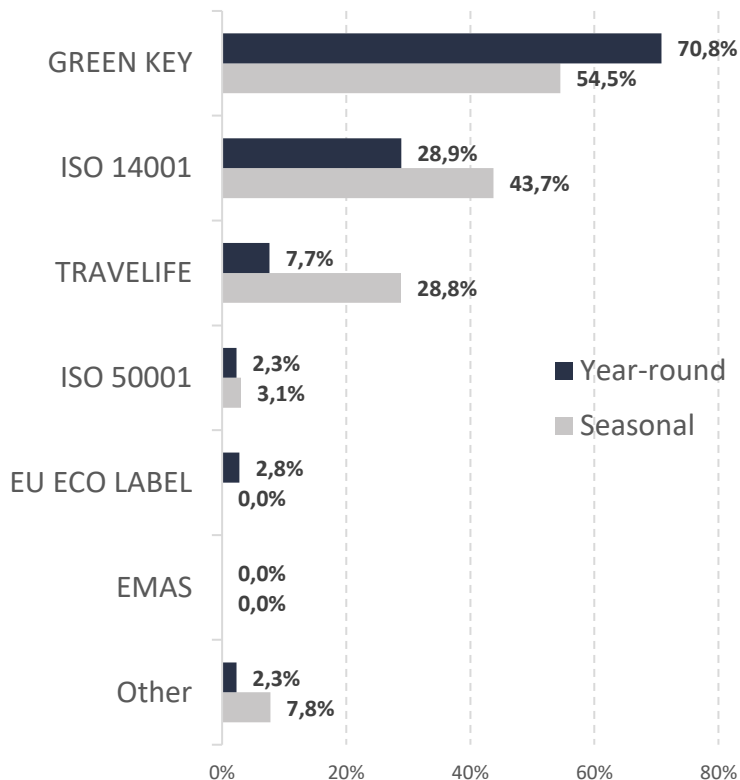


14,2% of year-round hotels and **9,3%** of seasonal hotels are in possession of a sustainability certificate.

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Types of Certification for Environment - Energy – Sustainability, by operation



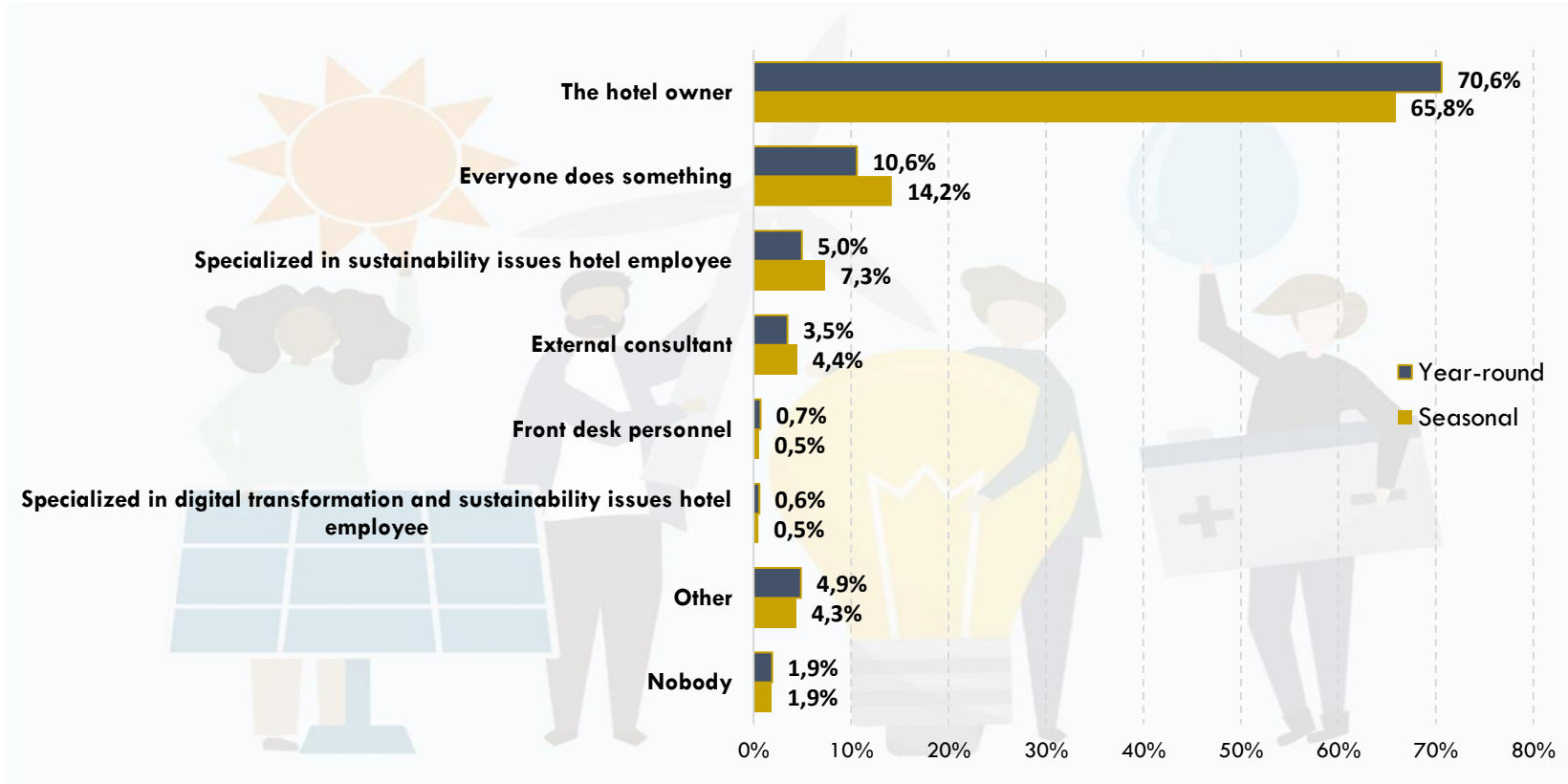
GREEN KEY seems to be the most popular certification among Greek hotels, with year-round hotels recording the highest ratio.

ISO14001 and **TRAVELIFE** certifications score better in seasonal hotels.

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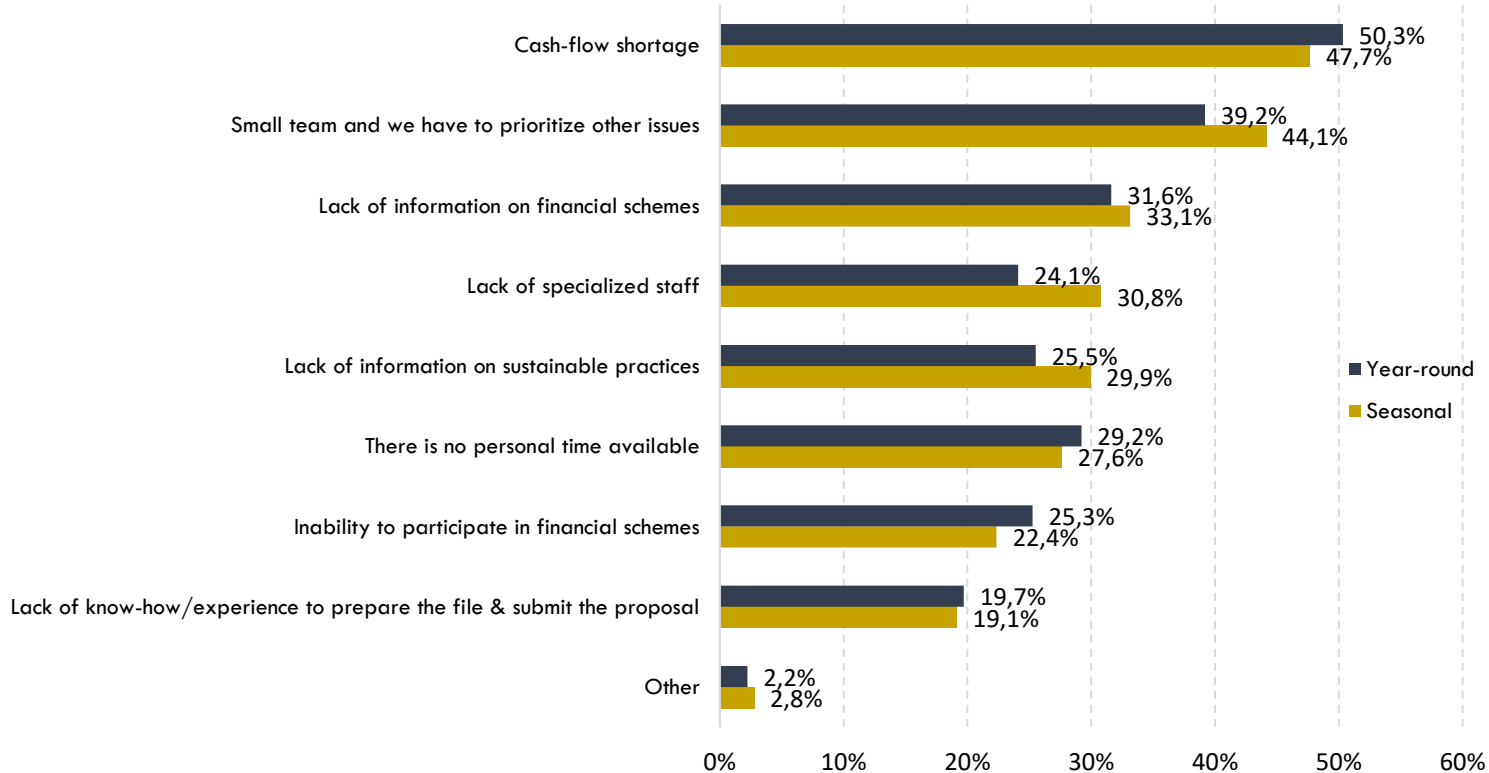


Who is responsible for sustainability issues?





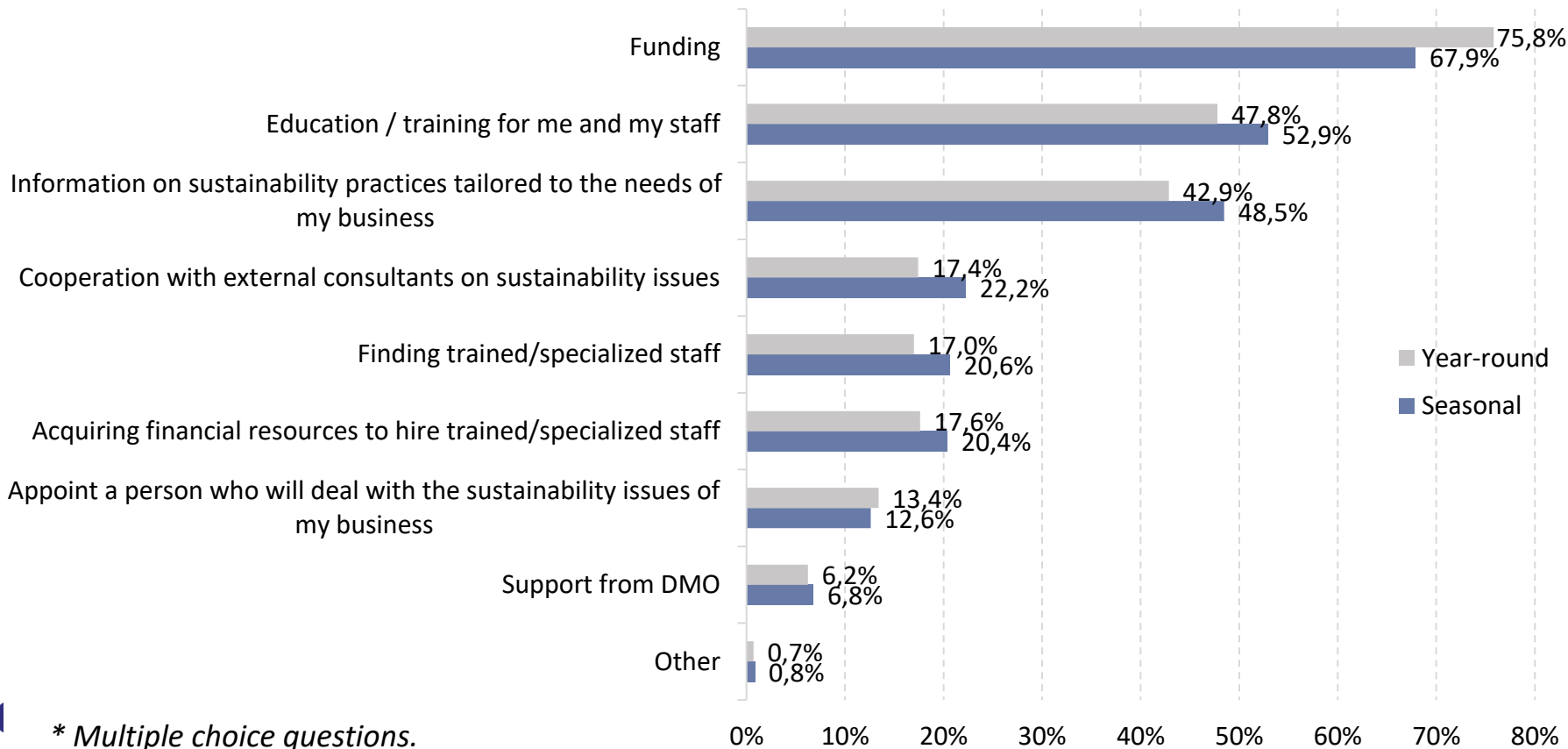
Barriers to implementing Sustainability Practices, by operation



* Multiple choice questions.



Facilitations for implementation or expansion of Sustainability Practices in the hotel, by operation

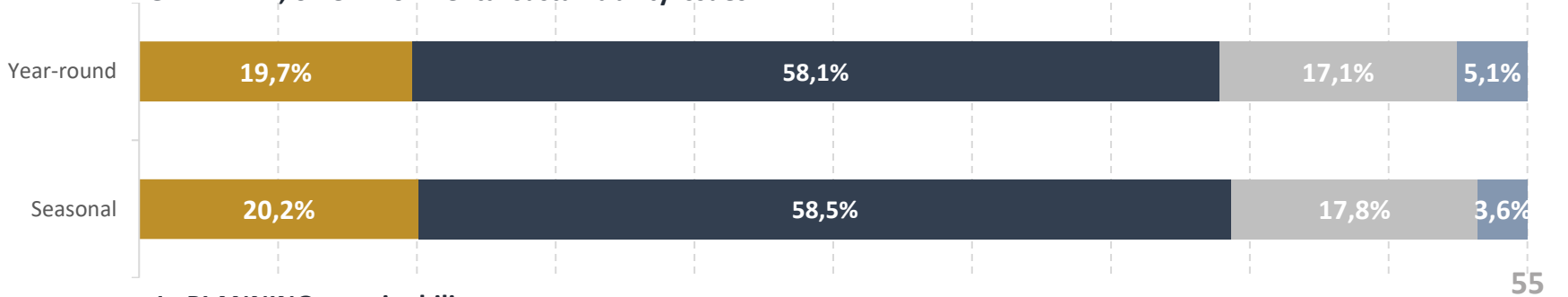


* Multiple choice questions.

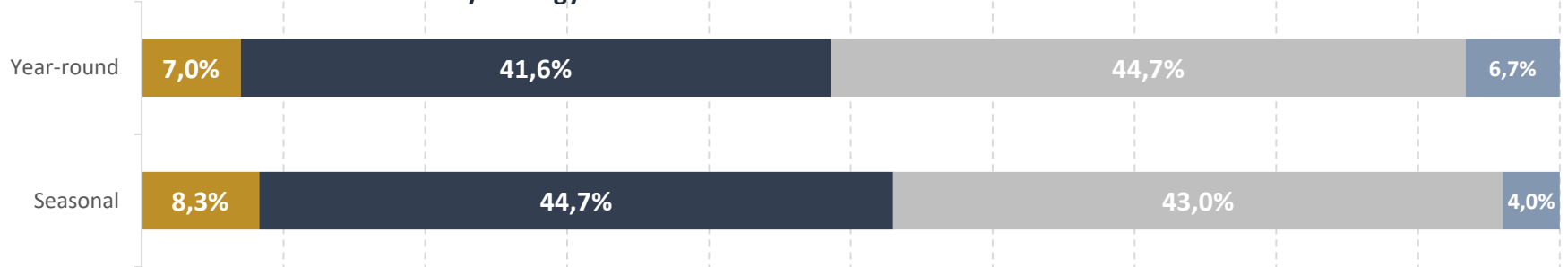


Self-assessment of the level of knowledge regarding:

GENERALLY, on environmental sustainability issues:



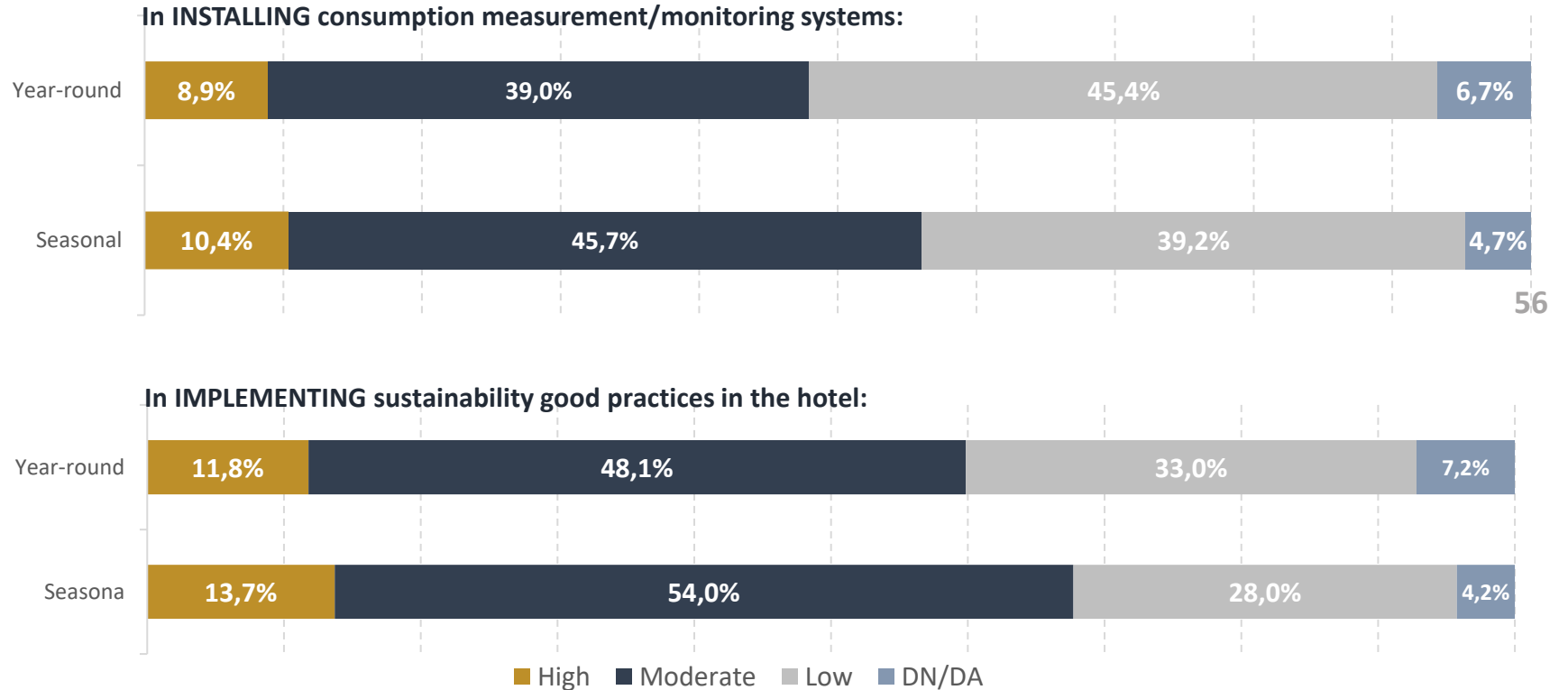
In PLANNING sustainability strategy:



■ High ■ Moderate ■ Low ■ DN/DA



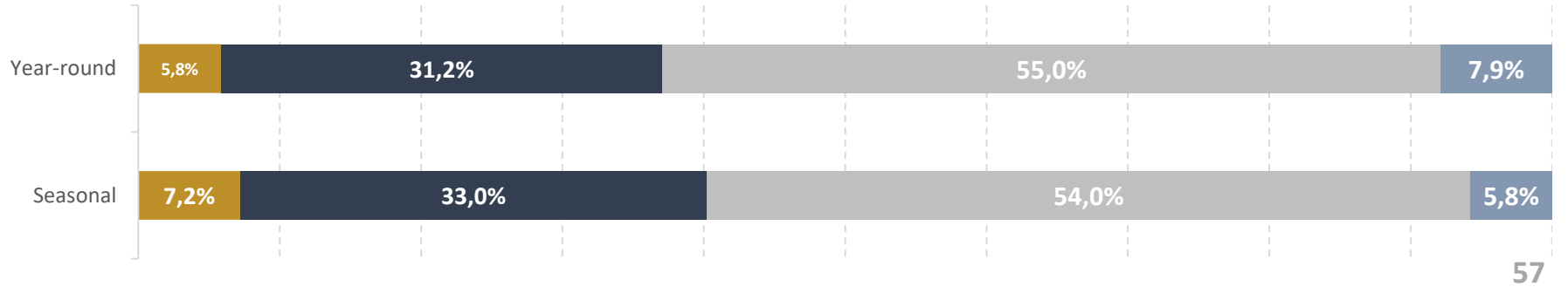
Self-assessment of the level of knowledge regarding:



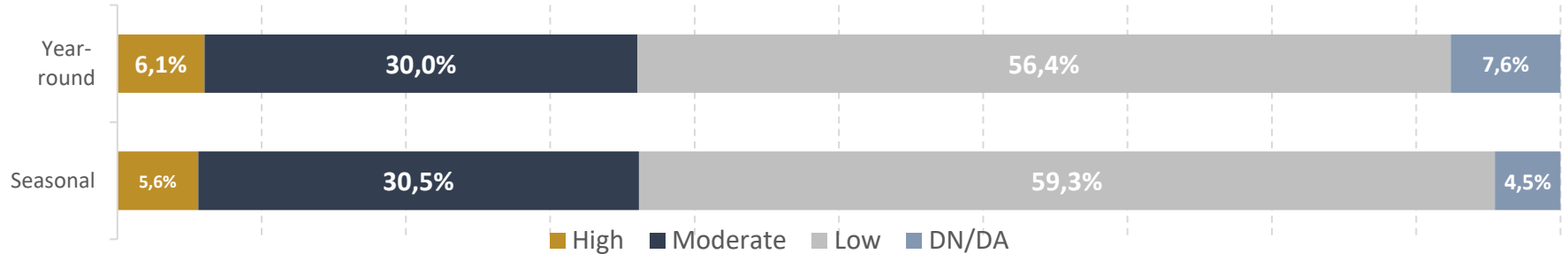


Self-assessment of the level of knowledge regarding:

In the PREREQUISITES of the institutional/legal framework:

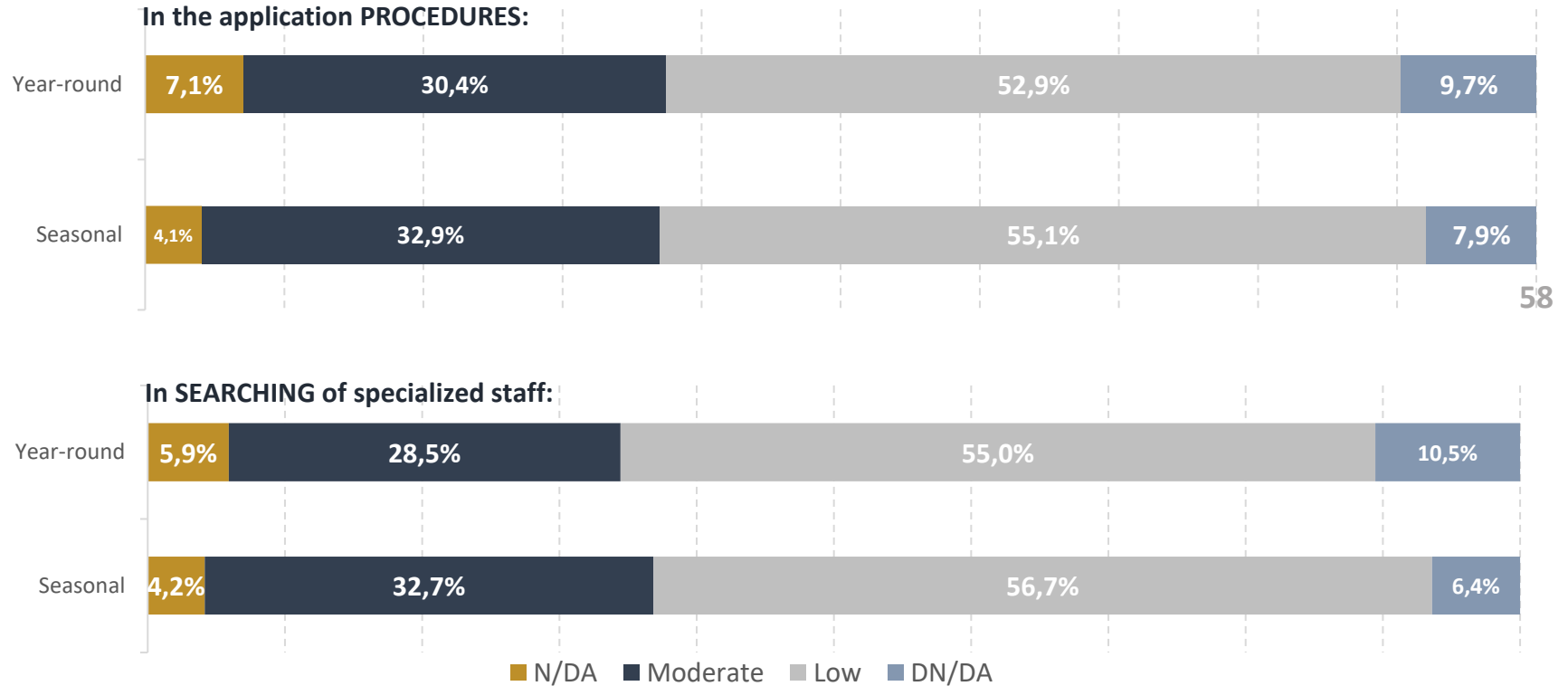


In OPPORTUNITIES and in the context of financing:





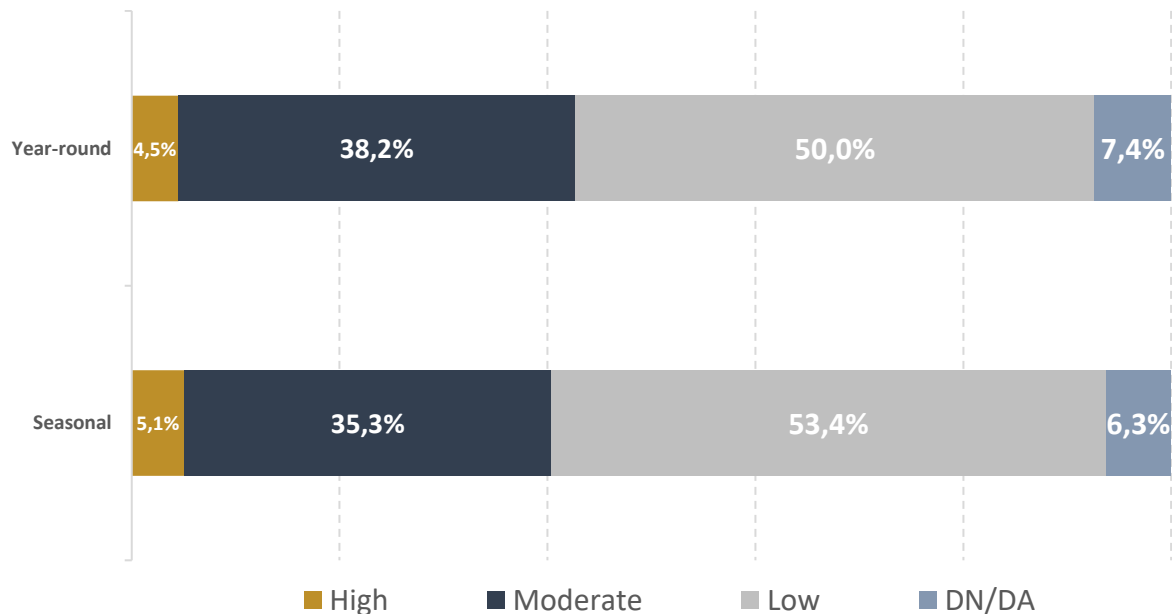
Self-assessment of the level of knowledge regarding:





Evaluation of the level of knowledge of the Staff ...

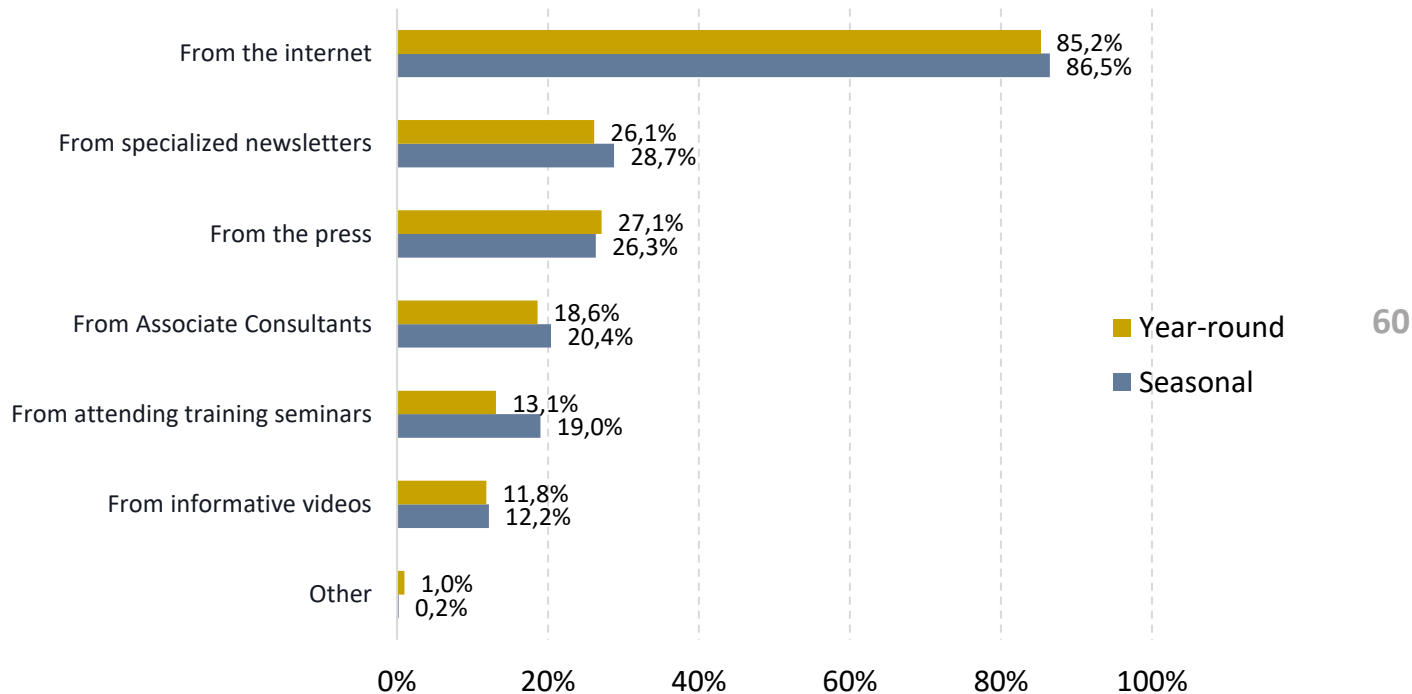
... regarding the implementation of sustainability good practices in the hotel



Staff training is equally necessary in both the seasonal and the year-round hotels. About 88% of hoteliers in both hotel categories consider their staff to have moderate to low level knowledge in implementing good sustainability practices.



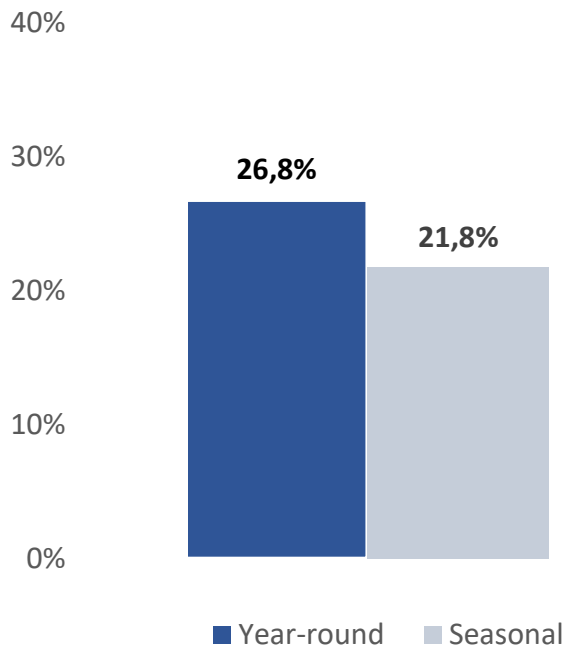
Sources of information on current developments regarding sustainability practices in the hospitality industry, by operation*



* Multiple choice questions.



"Grow Greece with Google"



26,8% of hoteliers of year-round hotels and **21,8%** of hoteliers of seasonal hotels know about Google's free sustainability training courses as part of the training program

"Grow Greece with Google".

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