



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
03. Analysis based on hotel category
04. Analysis based on hotel size
05. Analysis based on hotel location
06. Regional Analysis



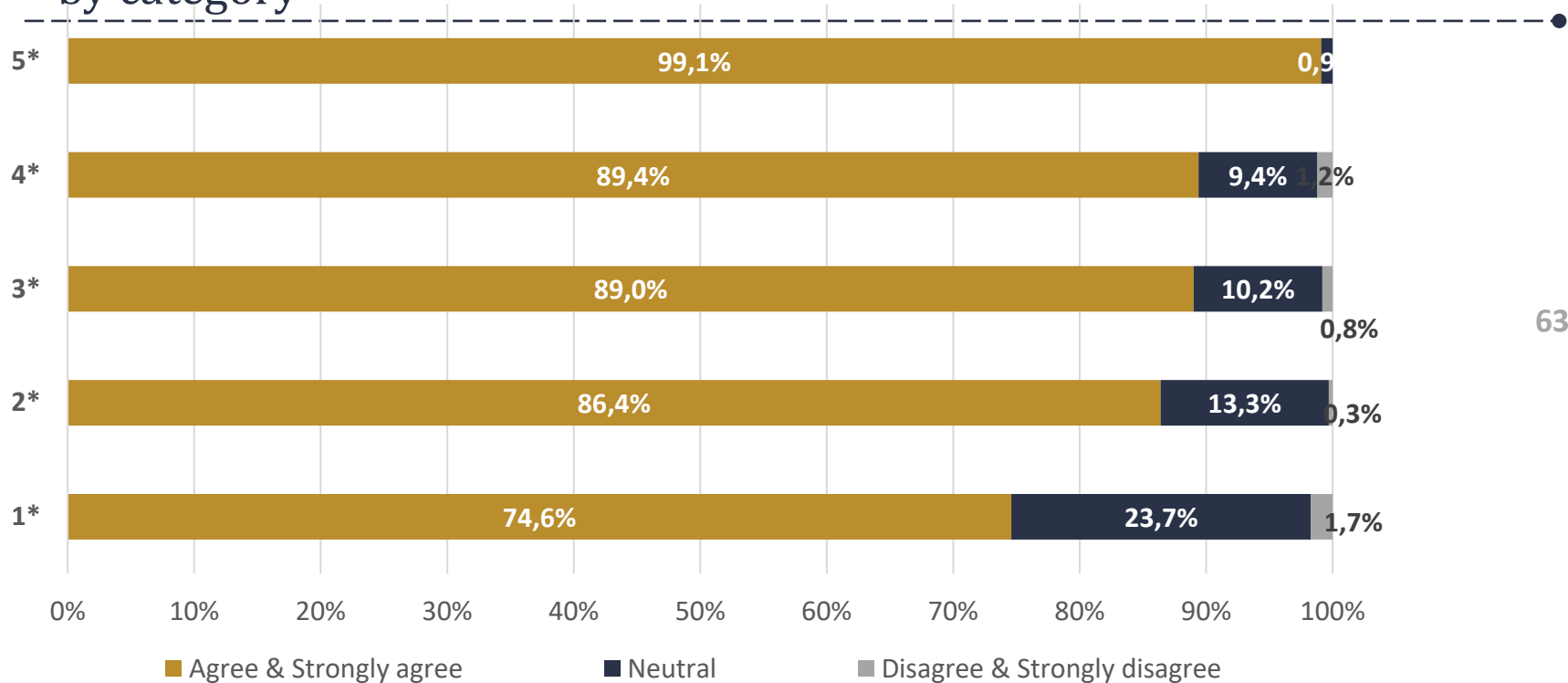
03

Analysis based on Hotel Category

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

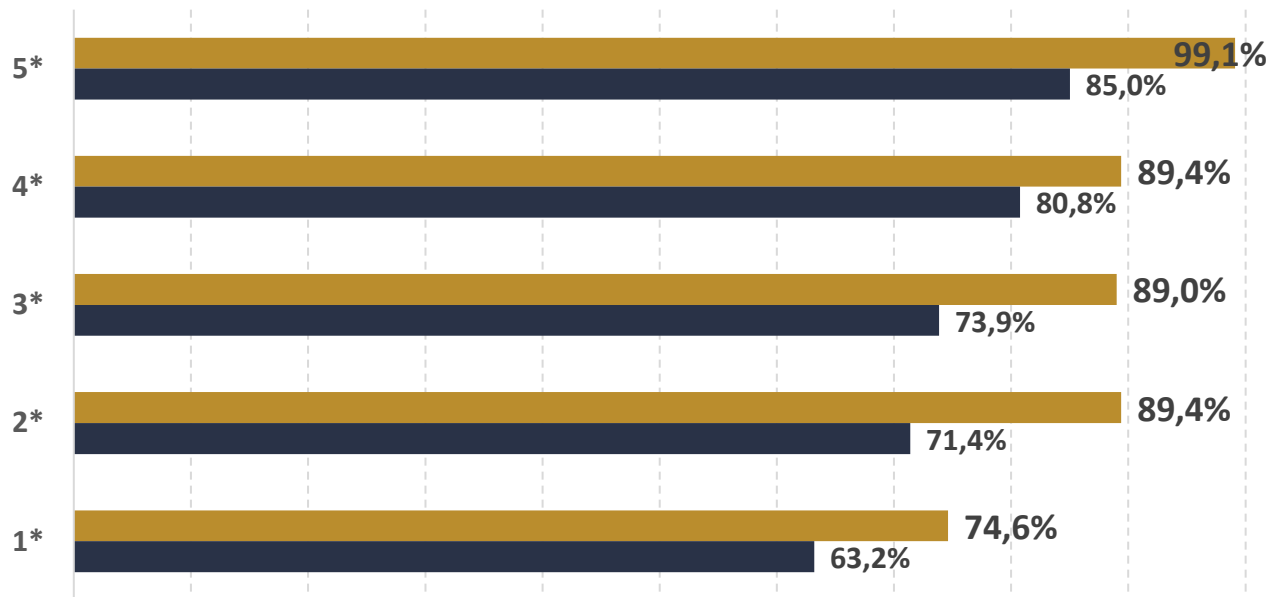


All 5* hotels recognize the importance of implementing sustainable practices for the future of their hotel enterprise.



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

Comparative response rate
"Agree & Strongly Agree"

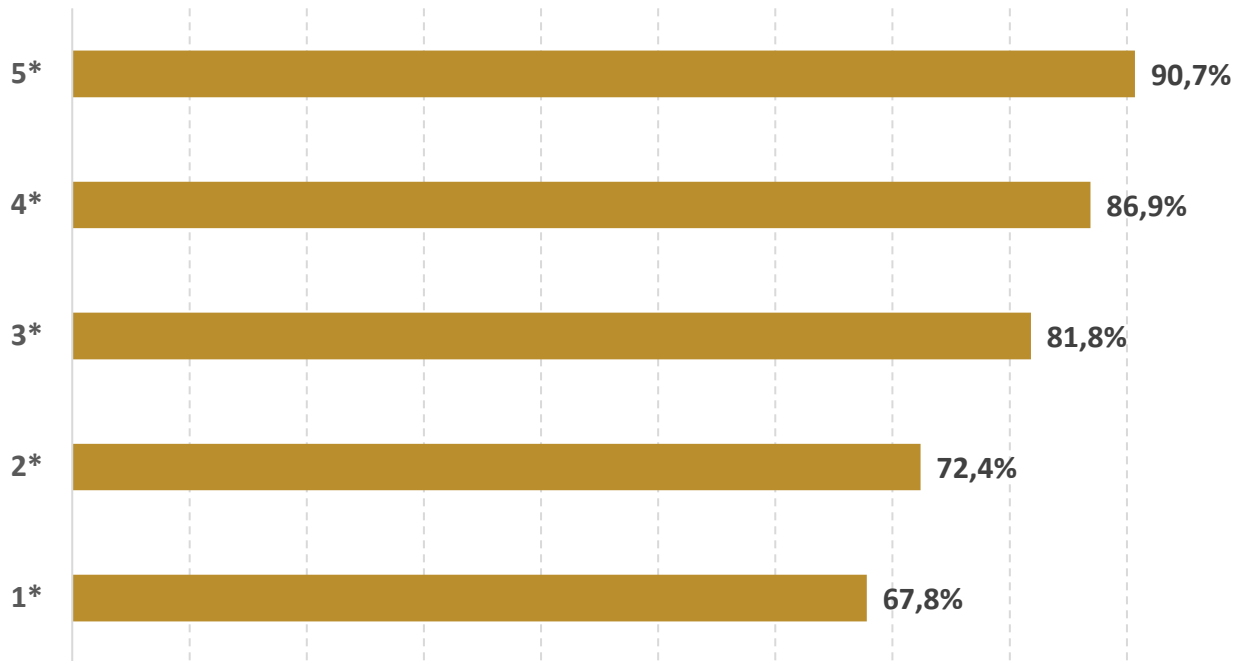




Hotels that have or plan to implement sustainability practices, by category



of hotels that have or intend to implement sustainable practices





Main reason for adopting sustainability practices

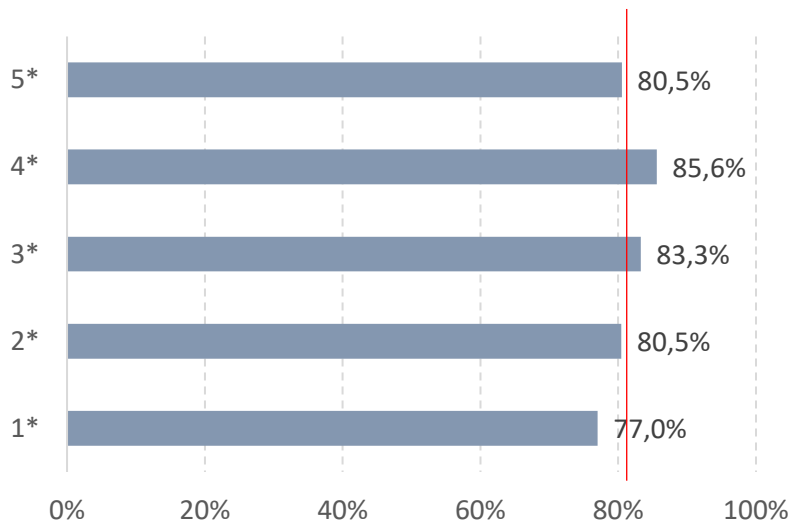
66

by Category

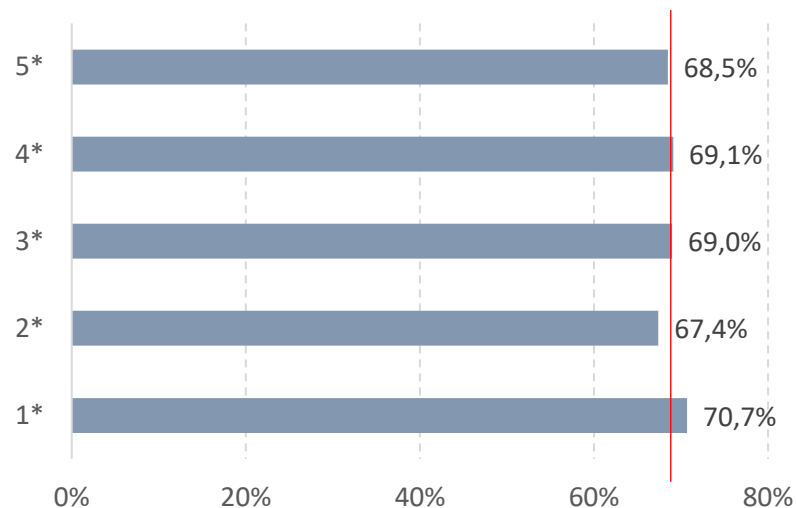


Main reason for adopting sustainability practices *, by category (It refers to 78% of the respondents)

It is my personal belief that we all must protect the planet (AVG. 81,9%)



They help sparing money (AVG. 68,7%)

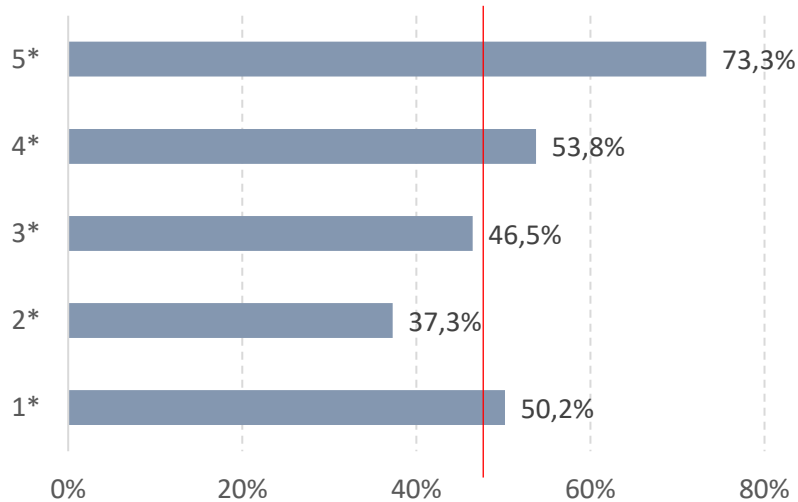


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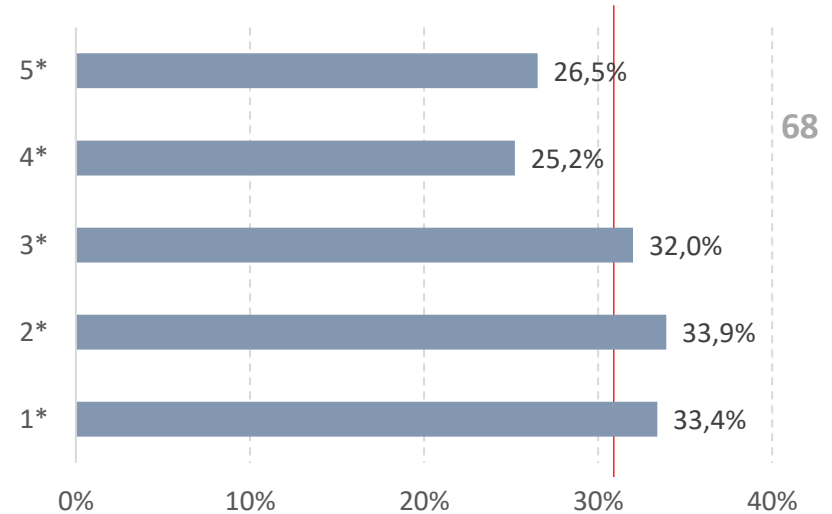


Main reason for adopting sustainability practices * , by category (It refers to 78% of the respondents)

My clients are interested
(AVG. 47,5%)



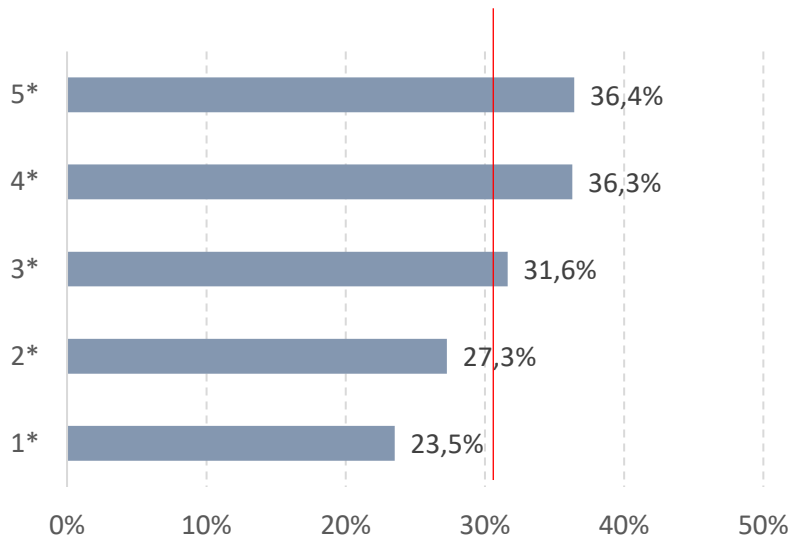
I do not want to fall behind
(AVG. 31,0%)



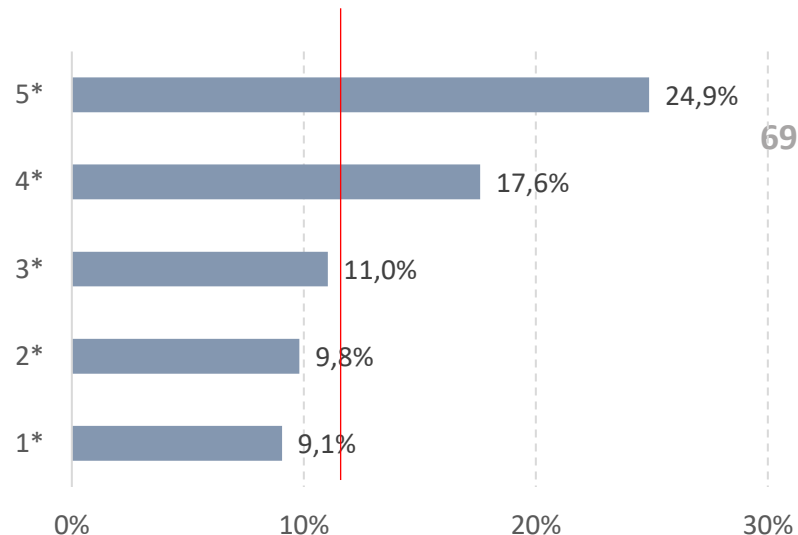


Main reason for adopting sustainability practices *, by category (It refers to 78% of the respondents)

*They make the difference in the market, and I can communicate it through several channels
(AVG. 30,6%)*



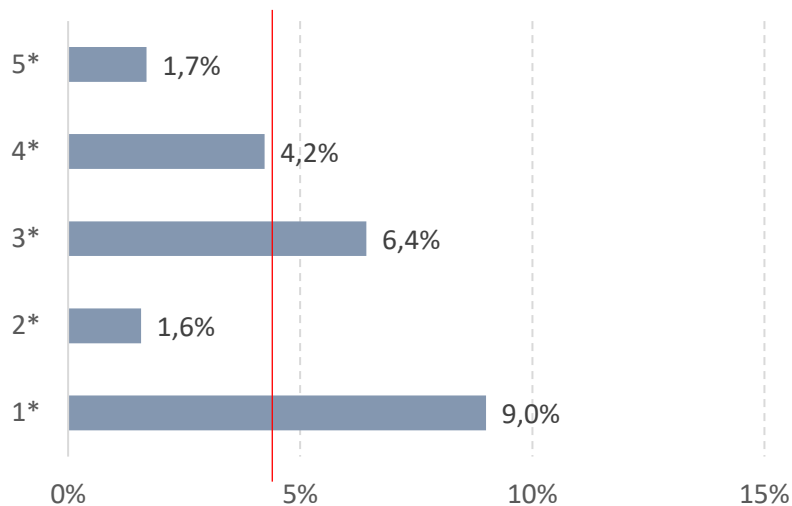
*It is mandatory by the law
(AVG. 12,8%)*





Main reason for adopting sustainability practices *, by category (It refers to 78% of the respondents)

I can charge an extra premium (AVG. 4,3%)



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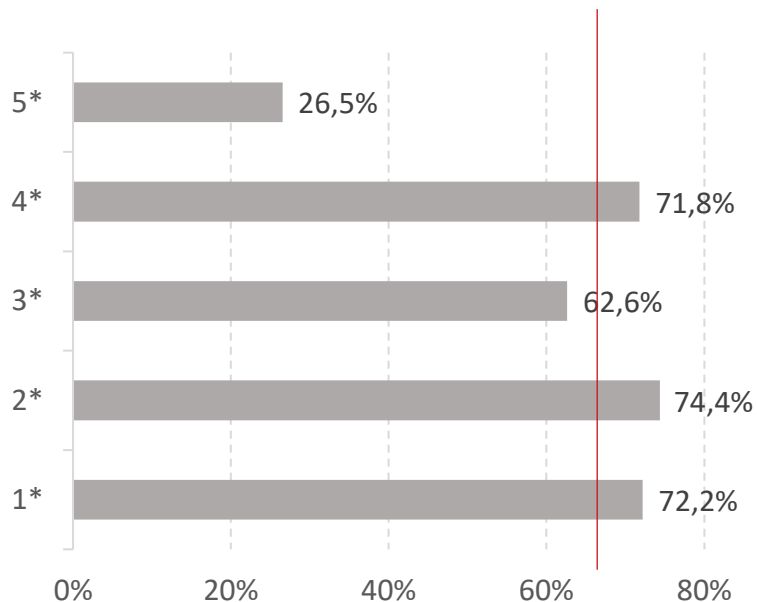
Main reason for NOT adopting sustainability practices

by Category

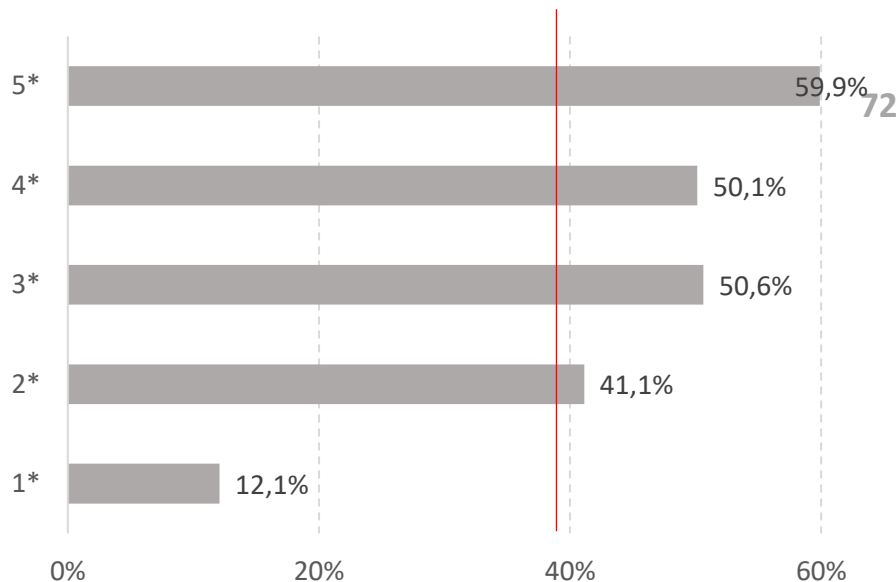


Main reason for NOT adopting sustainability practices *, by category (It refers to 22% of the respondents)

I do not have the money to materialize such an investment (AVG. 69,5%)



I do not have properly educated/specialized people to materialize such an investment (AVG. 39,5%)

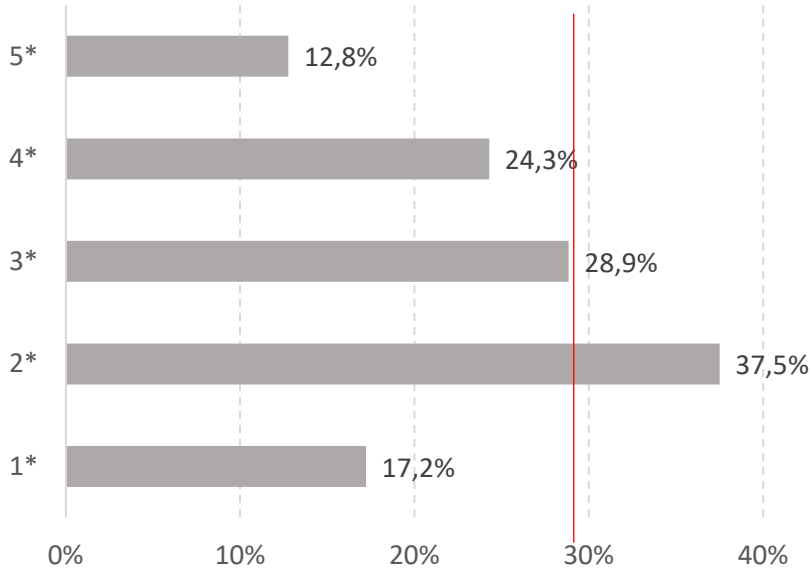


* Multiple choice questions.

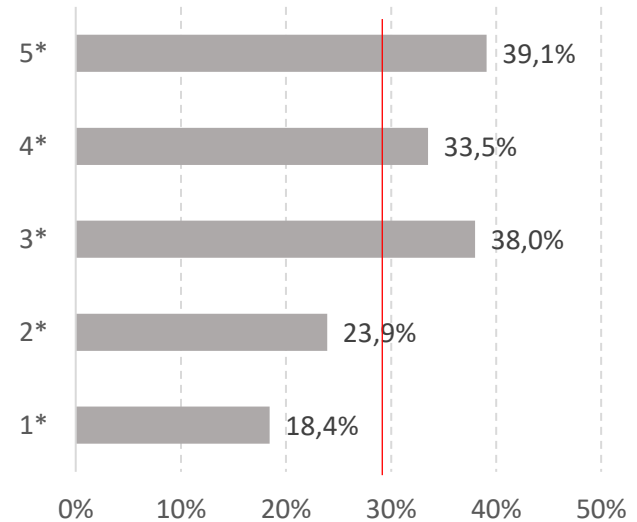


Main reason for NOT adopting sustainability practices *, by category (It refers to 22% of the respondents)

I do not have the time to organize such an investment (AVG. 29,6%)



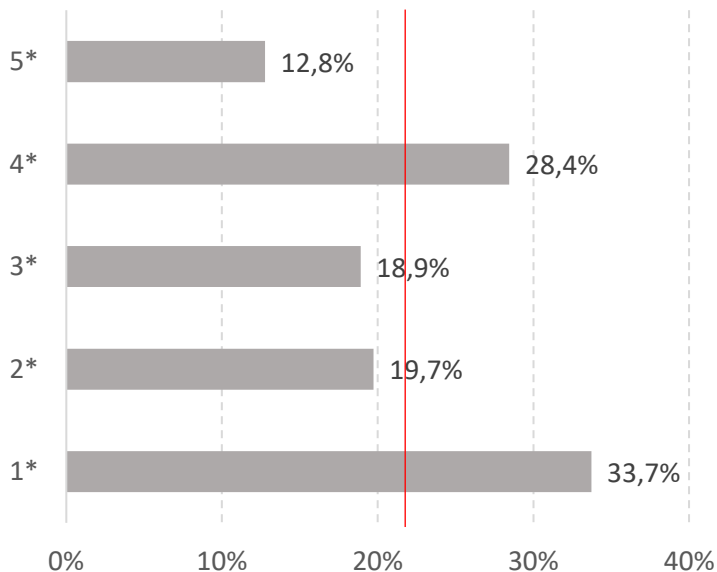
I do not have proper information of how to adopt sustainability practices (AVG. 27,7%)



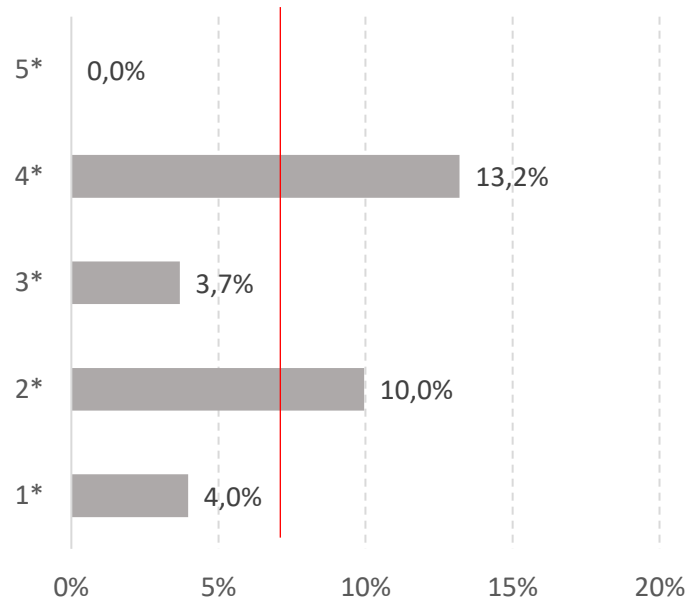


Main reason for NOT adopting sustainability practices *, by category (It refers to 22% of the respondents)

I am not eligible to participating in funding schemes (AVG. 22,9%)



It is not a selection criterion for my clients (AVG. 7,4%)

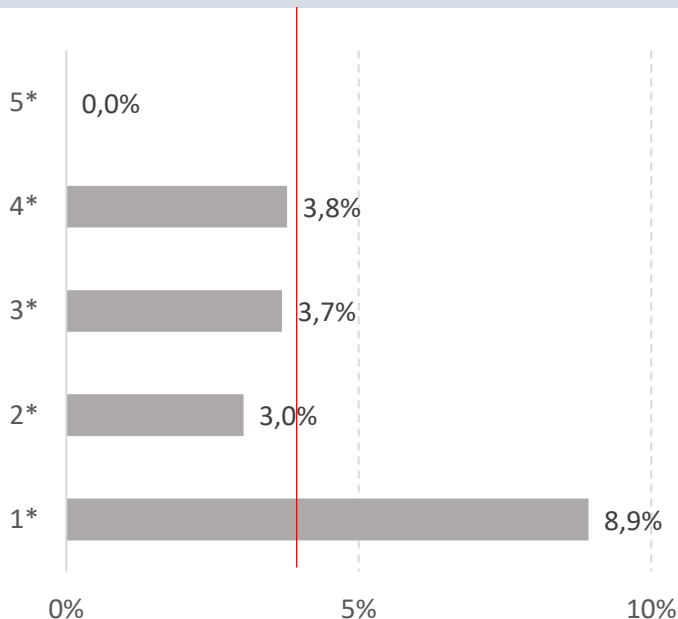


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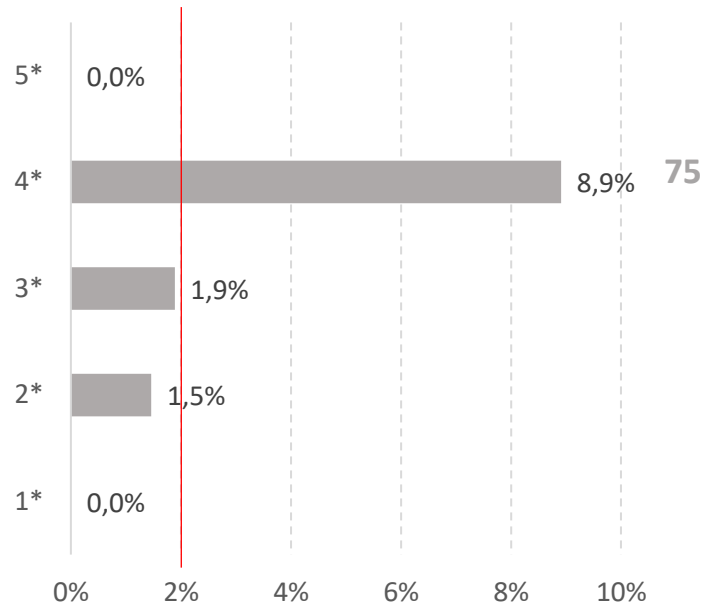


Main reason for NOT adopting sustainability practices *, by category (It refers to 22% of the respondents)

My other colleagues do not apply them either (AVG. 4,3%)



I do not consider such an investment to be profitable (AVG. 2,0%)





Strategy and Management Actions to promote sustainability

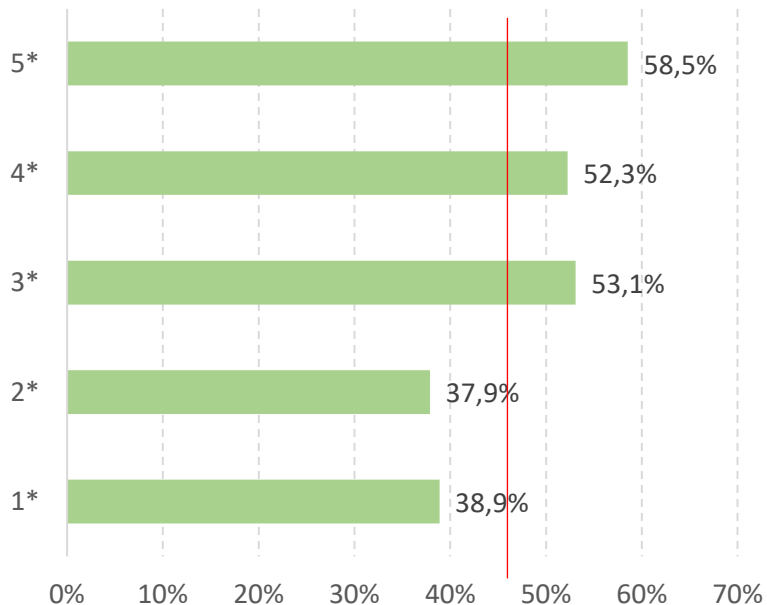
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by Category

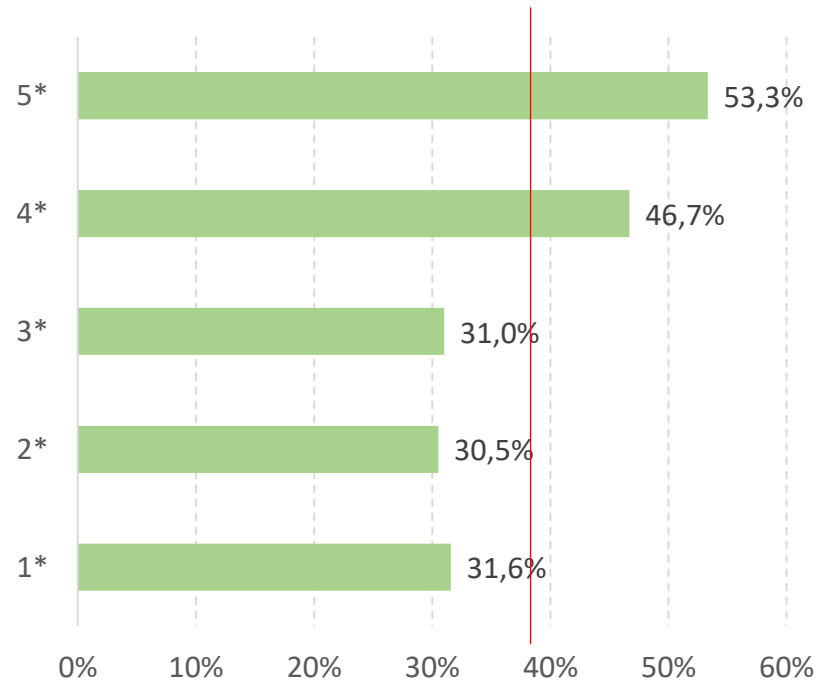


Strategy and Management: Actions to promote sustainability*, by category

I have set specific goals to improve the sustainability of my hotel (AVG. 46,3%)



I have been educated about it (AVG. 35,2%)



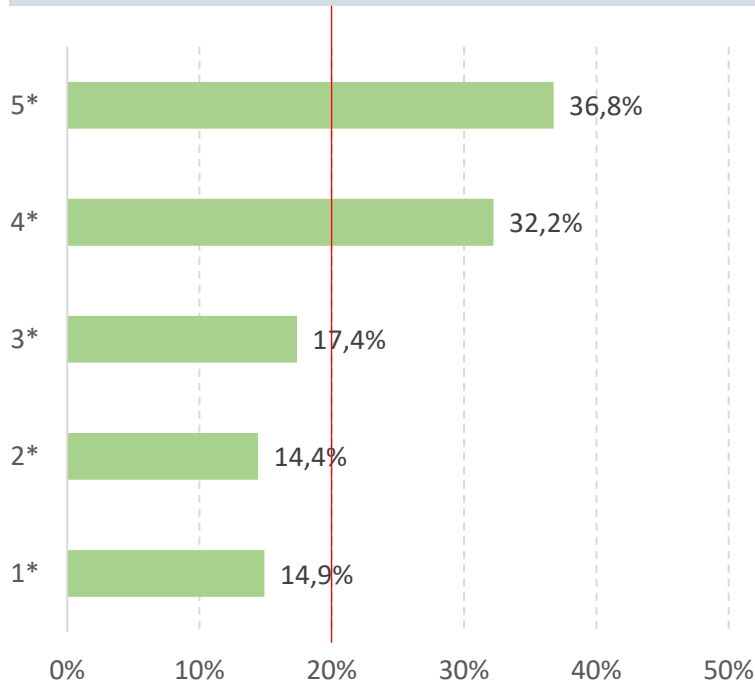
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* Multiple choice questions.

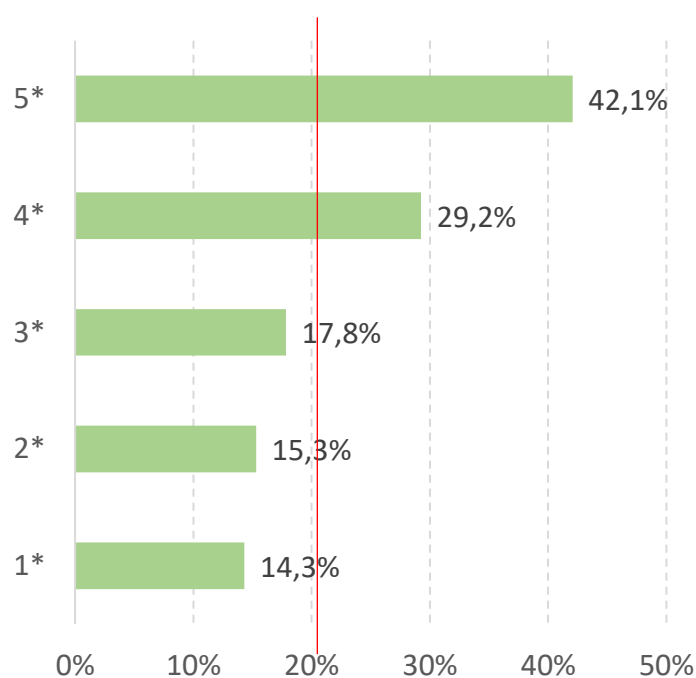


Strategy and Management: Actions to promote sustainability*, by category

I communicate my sustainability actions and practices to my clients (AVG. 20,0%)



I have trained my staff (AVG.20,2%)

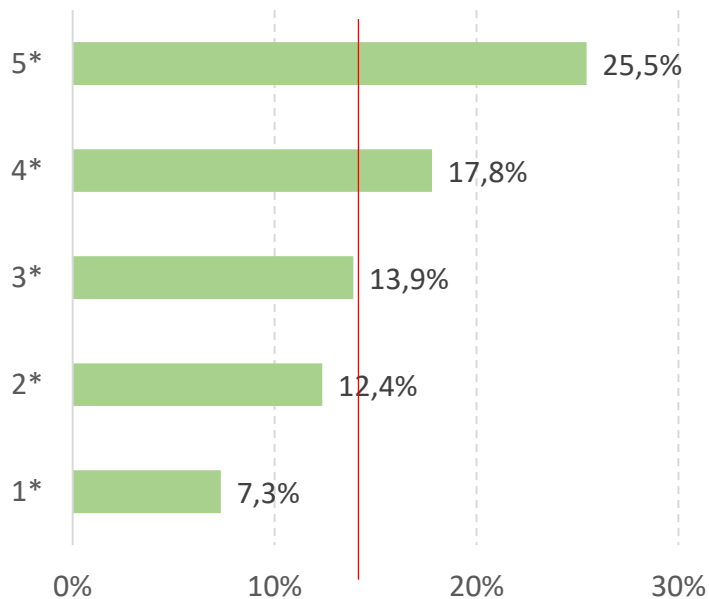


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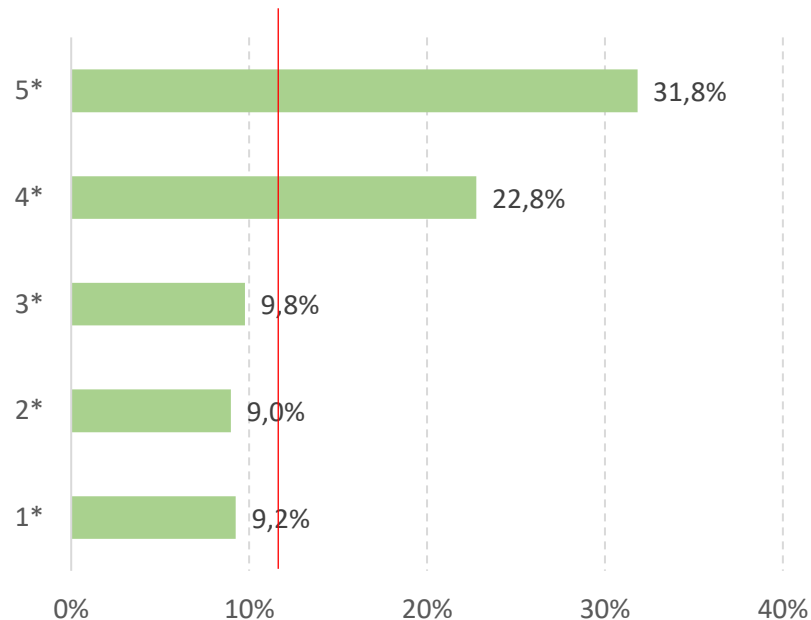


Strategy and Management: Actions to promote sustainability*, by category

I have budgeted a specific amount for the implementation of sustainability practices (AVG. 14,0%)



I have implemented a strategic sustainability plan (AVG. 13,2%)



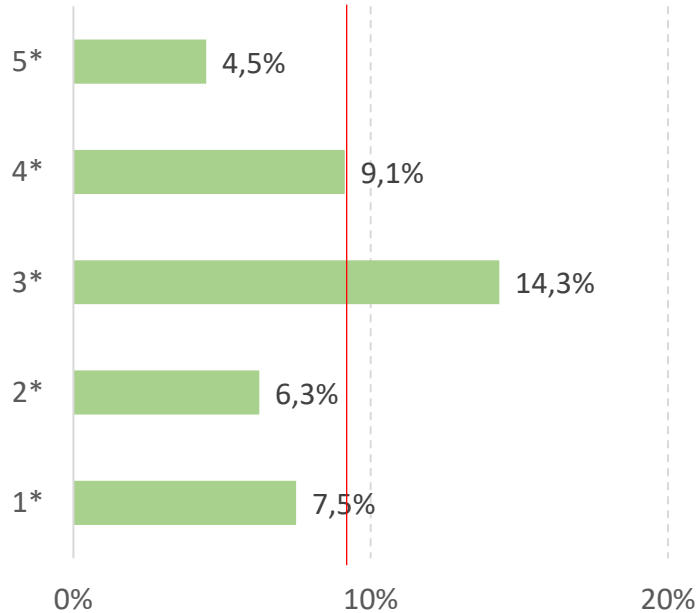
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* Multiple choice questions.

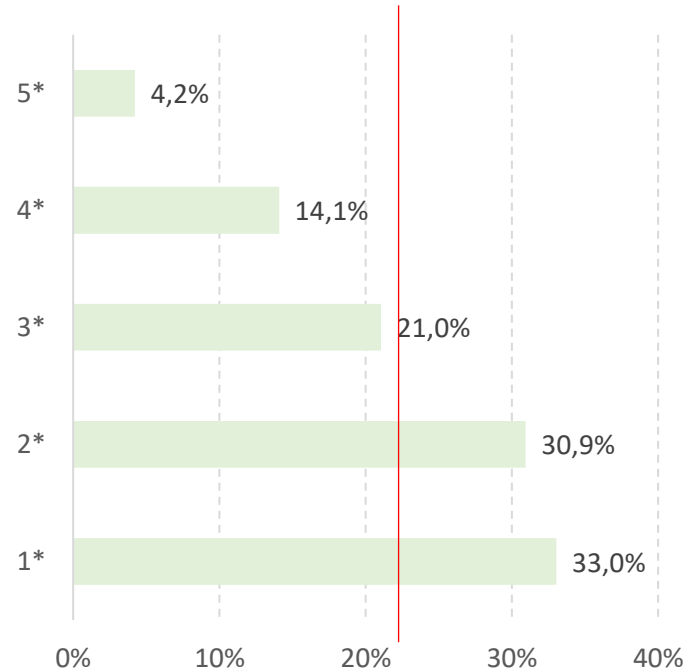


Strategy and Management: Actions to promote sustainability, by category

I have applied to join a funding scheme for sustainable practices (AVG. 9,1%)



None (AVG. 23,6%)



80

** Multiple choice questions.*

Monitoring and Measuring of important hotel sustainability variables

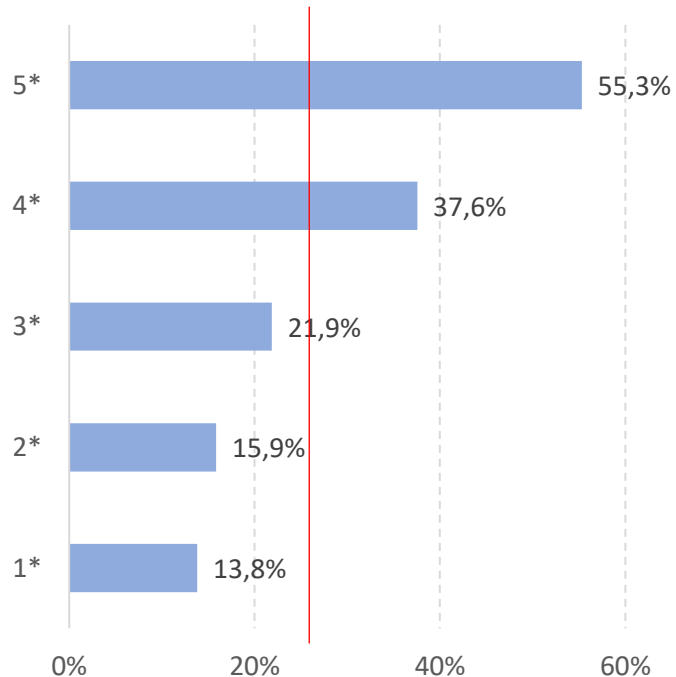
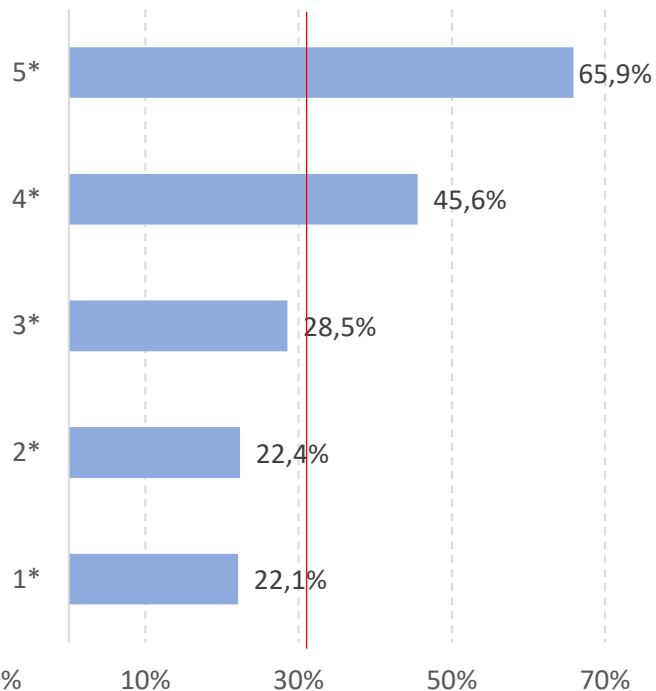
by Category



Monitoring and Measuring of important hotel sustainability variables*, by category

Energy consumption measurement-monitoring systems (AVG. 31,1%)

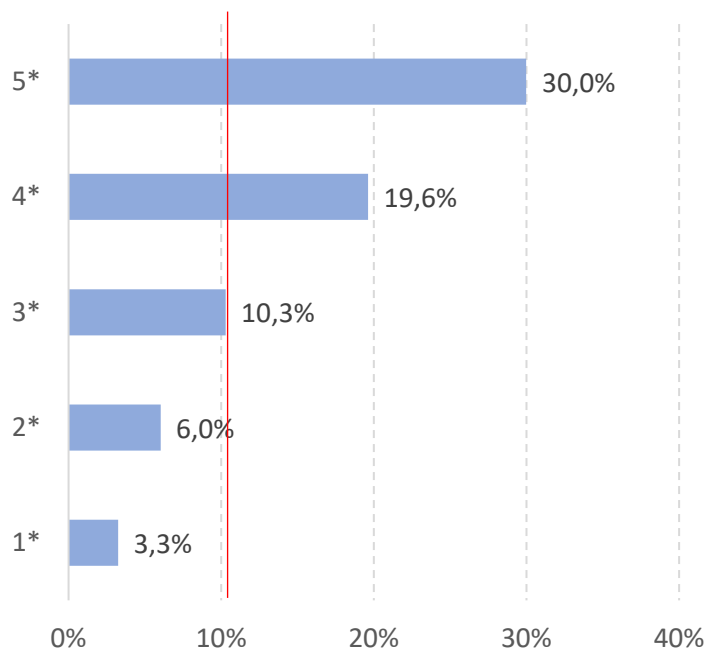
Water consumption measurement-monitoring systems (AVG. 23,8%)



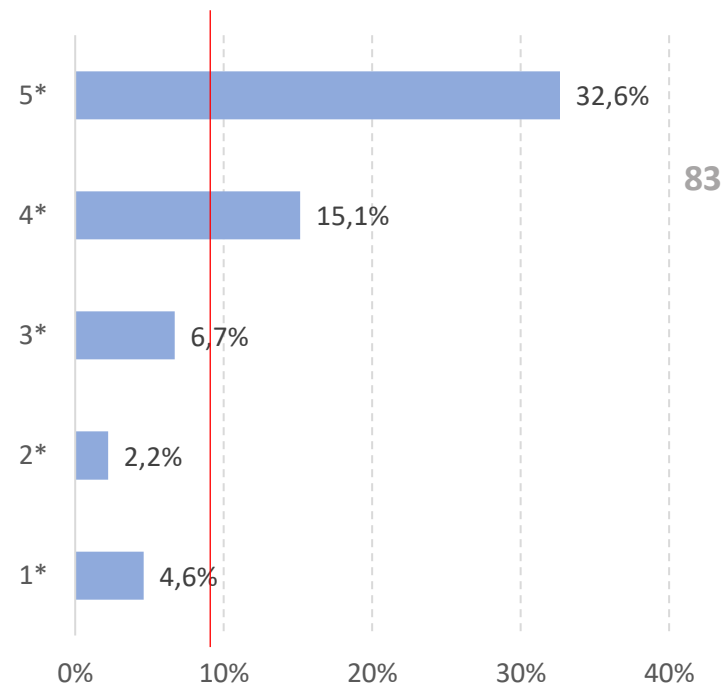


Monitoring and Measuring of important hotel sustainability variables*, by category

Food waste measurement-monitoring systems (AVG. 10,9%)



Measurement-monitoring systems for solid waste (AVG. 8,1%)



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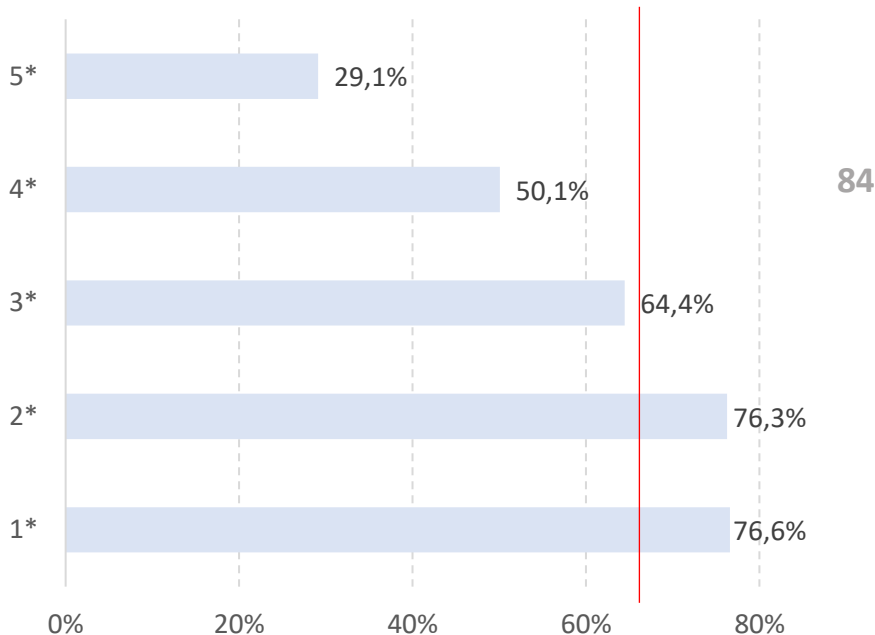
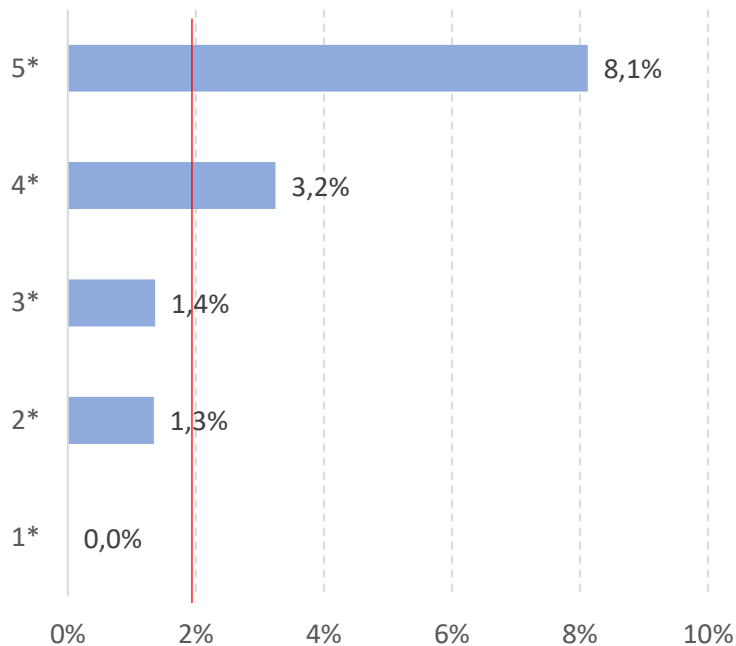
* Multiple choice questions.



Monitoring and Measuring of important hotel sustainability variables*, by category

Measurement-monitoring systems for CO2 emissions (AVG. 2,0%)

I haven't installed a sustainability metrics system yet (AVG. 65,1%)



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* Multiple choice questions.

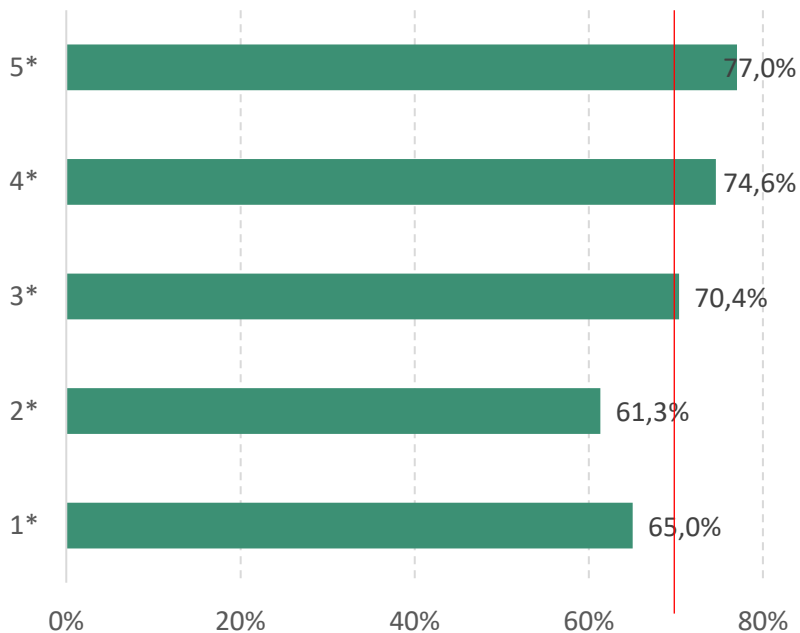
Hotel investments in sustainability practices

by Category

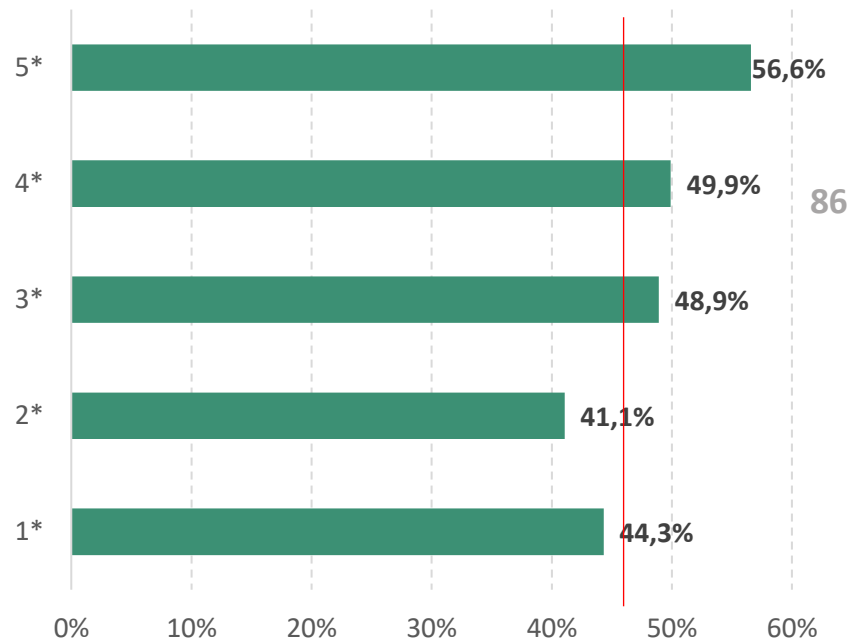


Hotel investments in sustainability practices*, by category

Reducing energy consumption
(AVG. 67,7%)



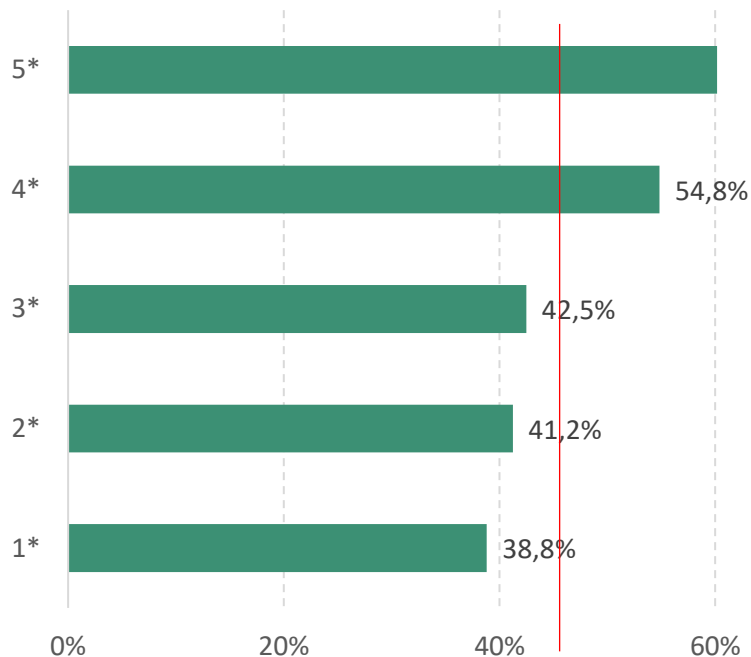
Waste recycling (AVG. 46,3%)



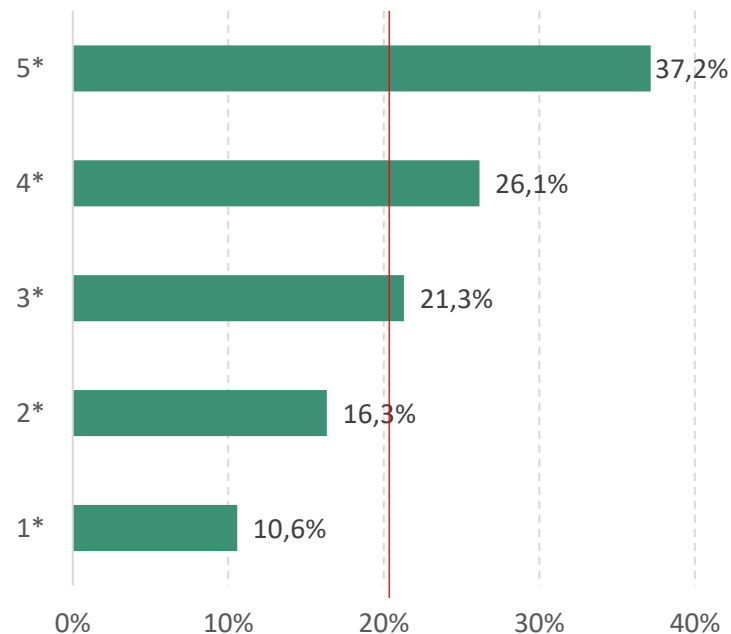


Hotel investments in sustainability practices*, by category

Reducing water consumption (AVG. 45,0%)



Food waste recycling (AVG. 20,2%)

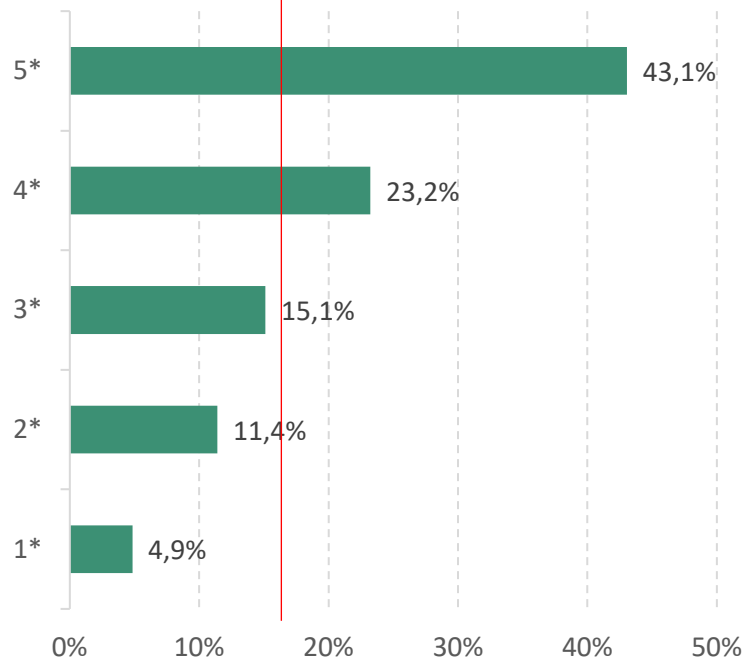


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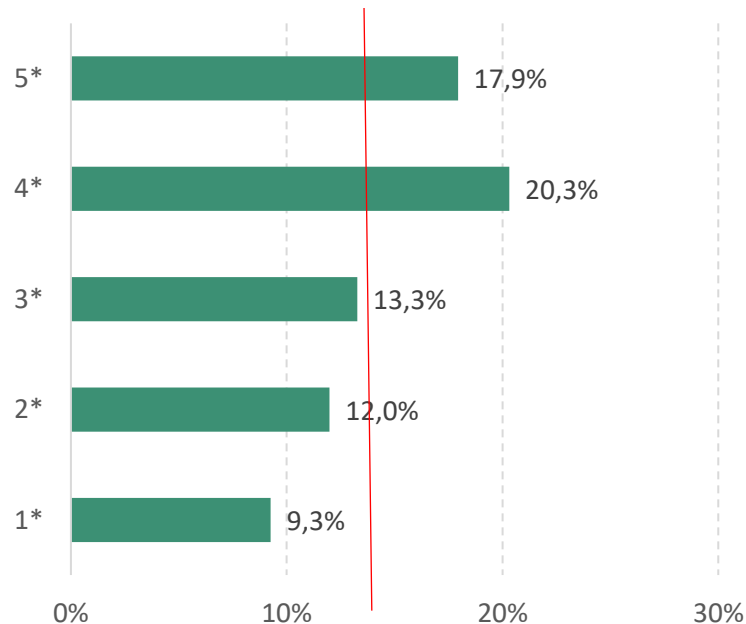


Hotel investments in sustainability practices*, by category

Waste management (AVG. 15,9%)



Production of green energy from RES (AVG. 13,9%)



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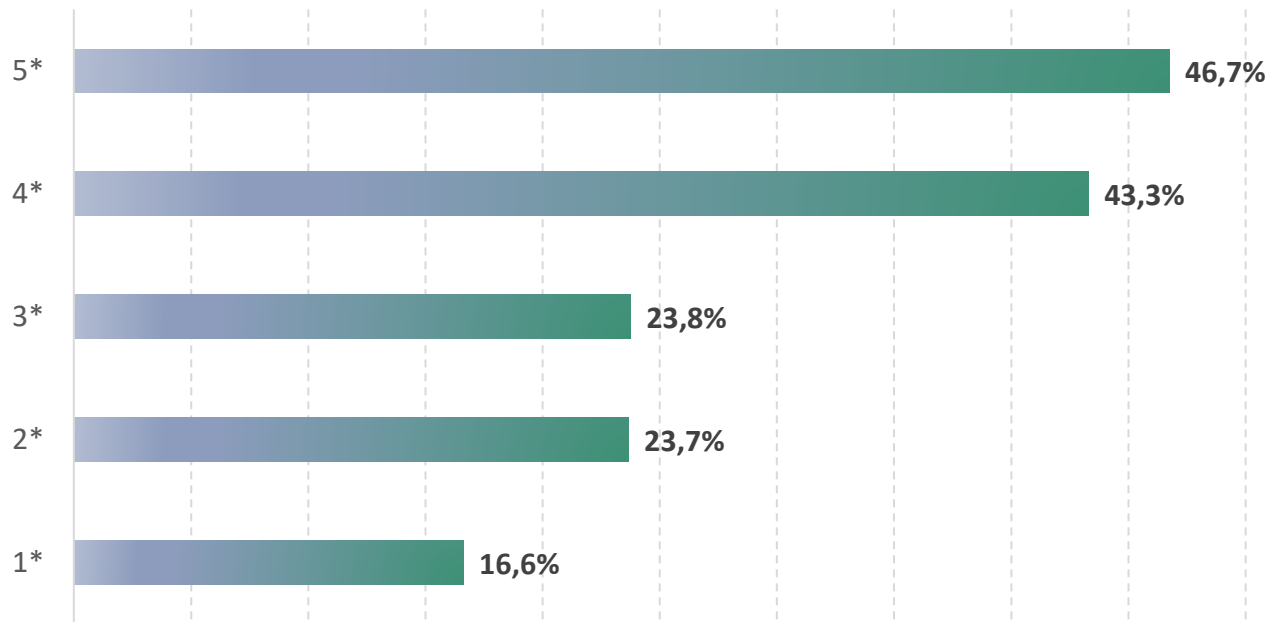
Communication and promotion of sustainability actions implemented by hotels

by Category



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

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

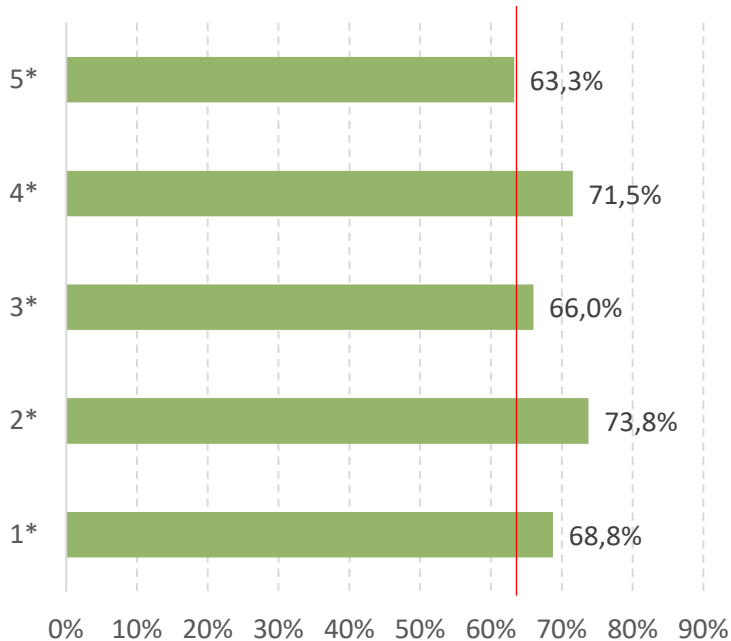




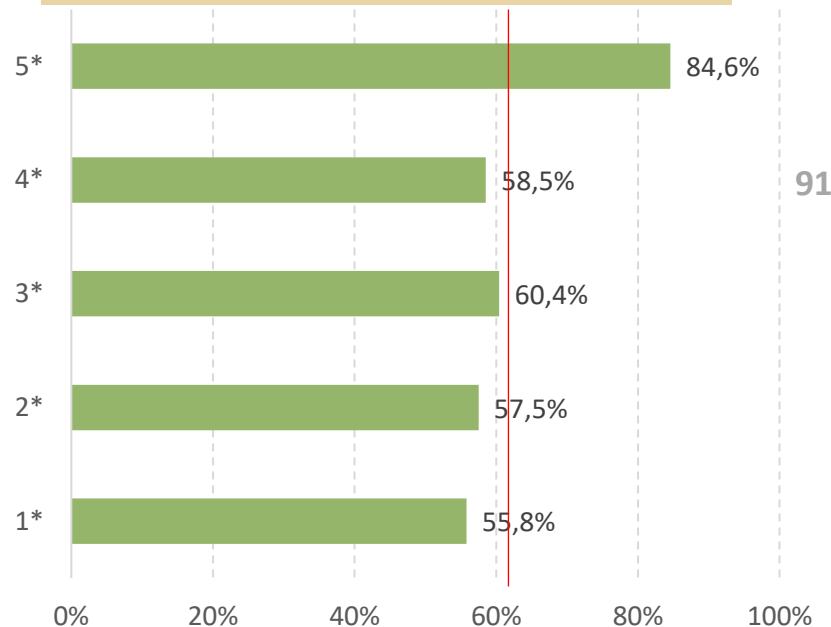
Communication and promotion channels of sustainability actions implemented by hotels*, by category

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

Signage in the hotel area (AVG. 69,7%)



Hotel website (AVG. 61,5%)

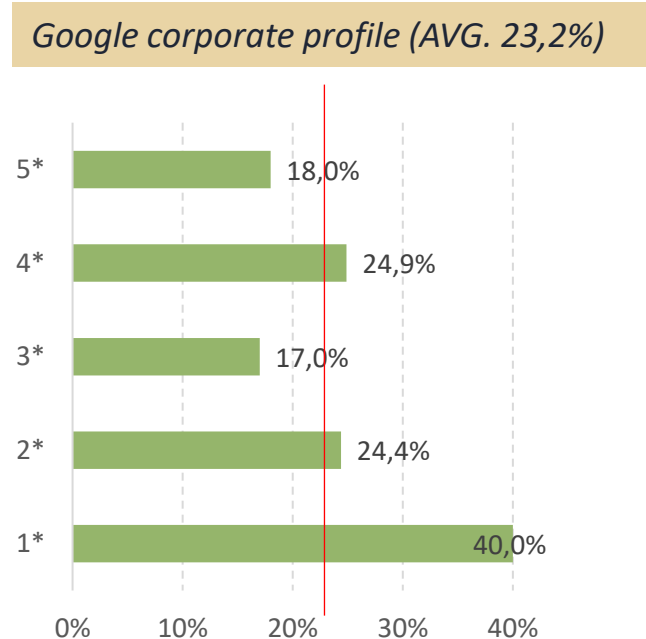
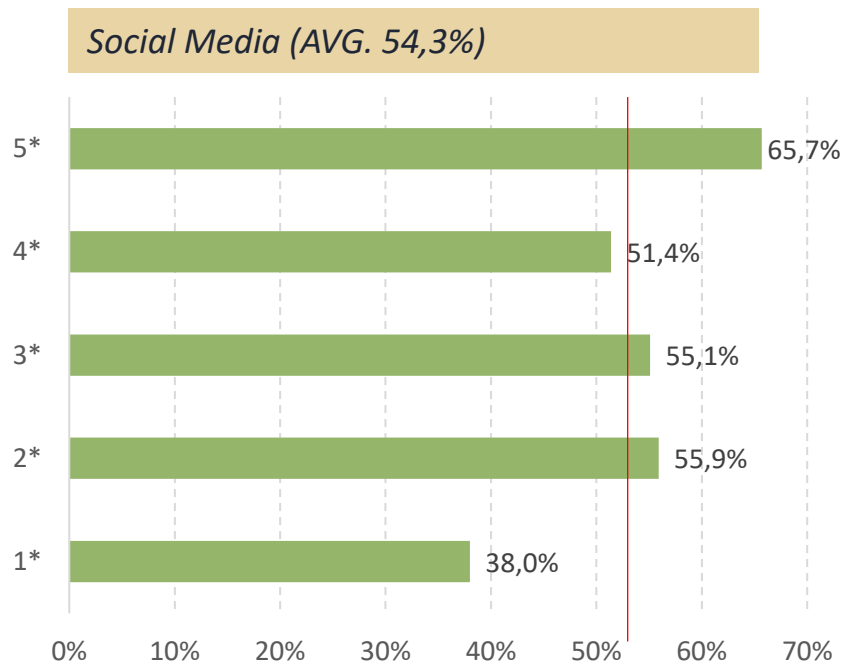


* Multiple choice questions.



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

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

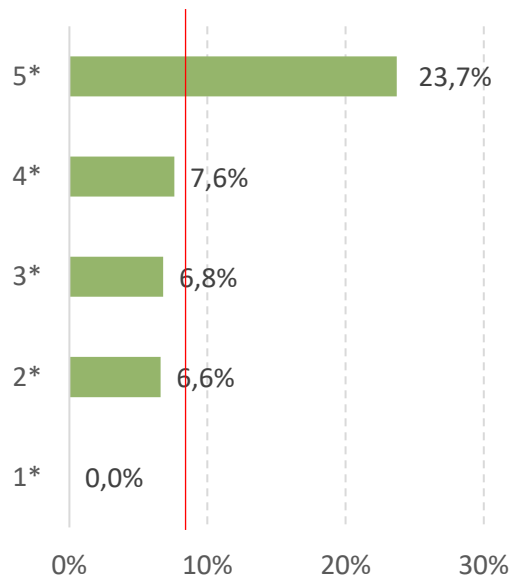




Communication and promotion channels of sustainability actions implemented by hotels*, by category

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

Promotion / Advertising (AVG. 8,4%)



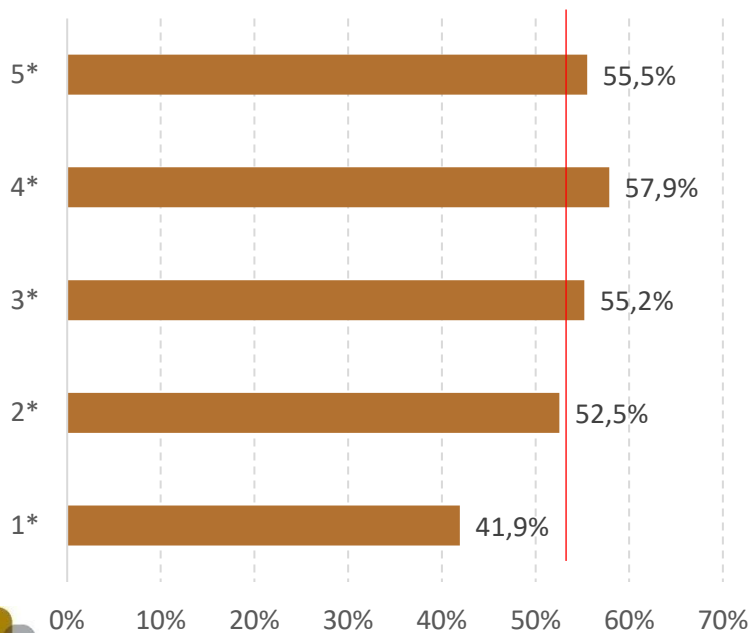
Measurable benefits from implementing sustainability actions

by Category

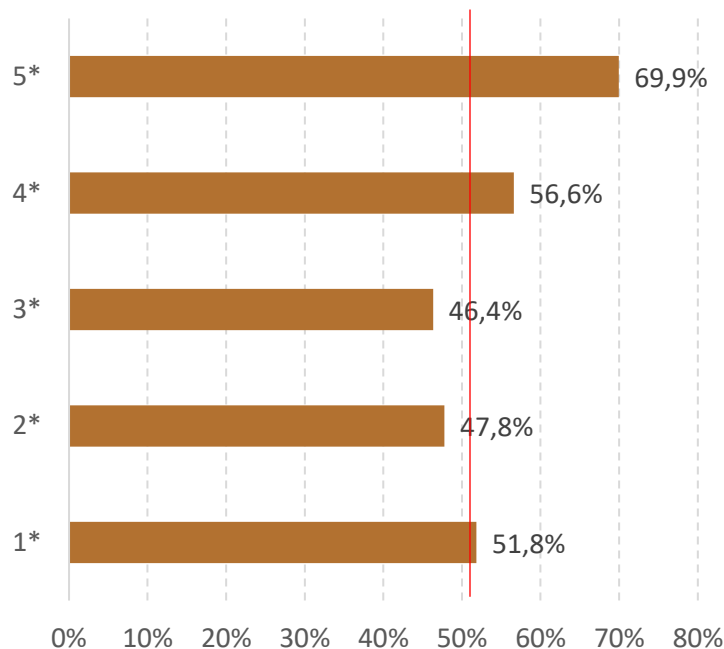


Measurable benefits from implementing sustainability actions*, by category

Reduction of operational costs (AVG. 53,6%)



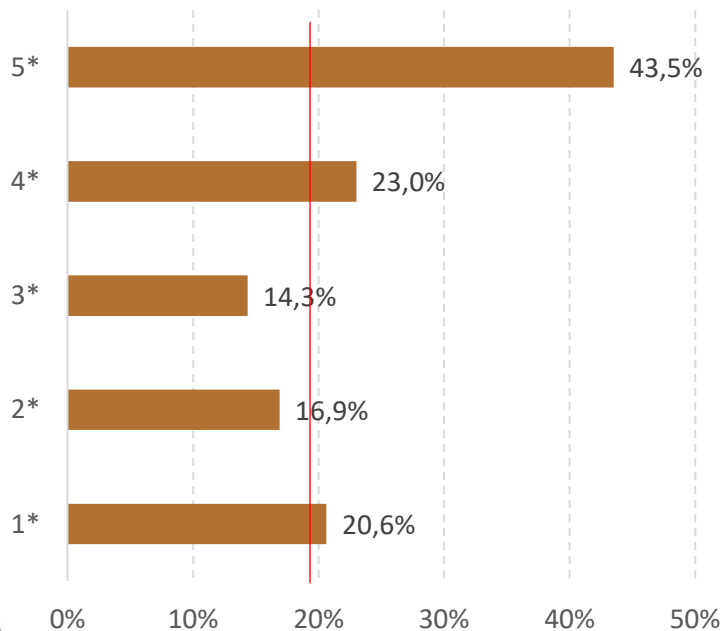
Maintain the balance of local ecosystem (AVG. 51,4%)



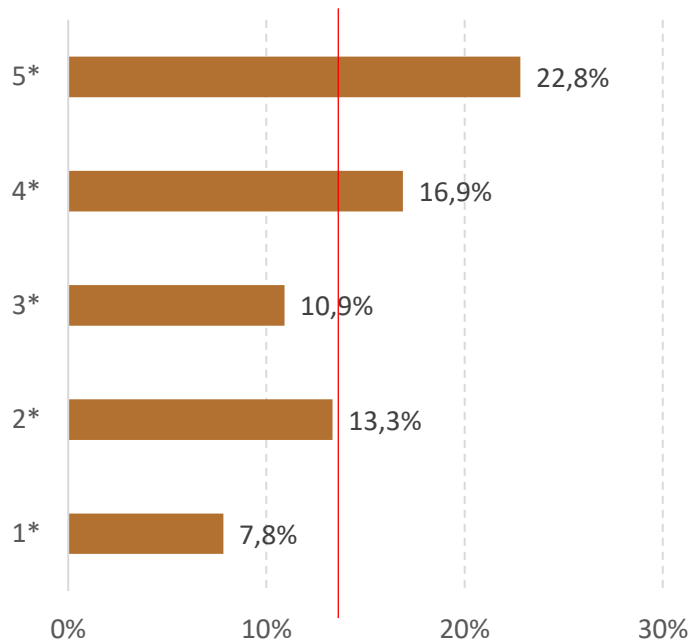


Measurable benefits from implementing sustainability actions*, by category

Promotes the relationships with the local community (AVG. 19,9%)



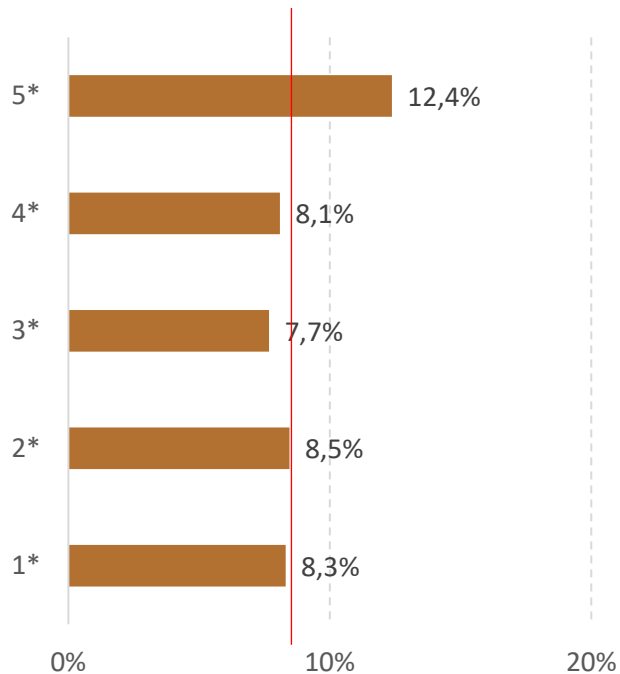
Increase hotel turnover (AVG. 13,5%)



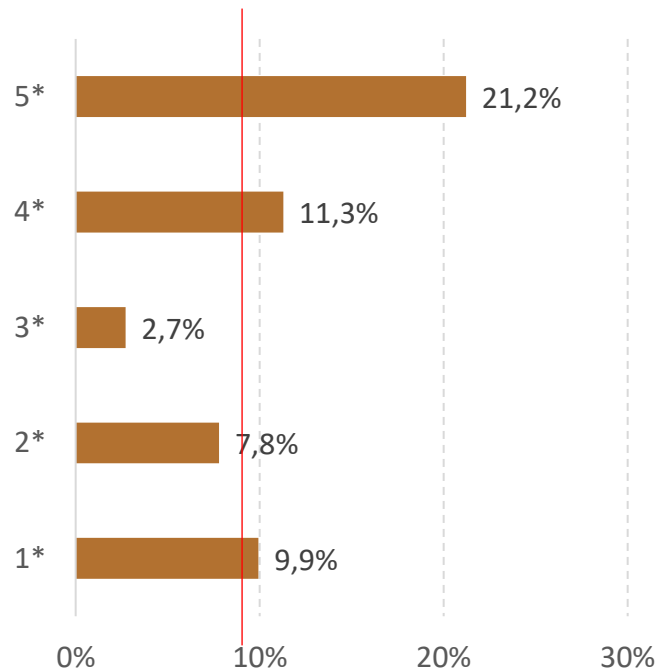


Measurable benefits from implementing sustainability actions*, by category

Gives access to new client markets
(AVG. 8,5%)



Makes me a more attractive employer (AVG. 8,3%)

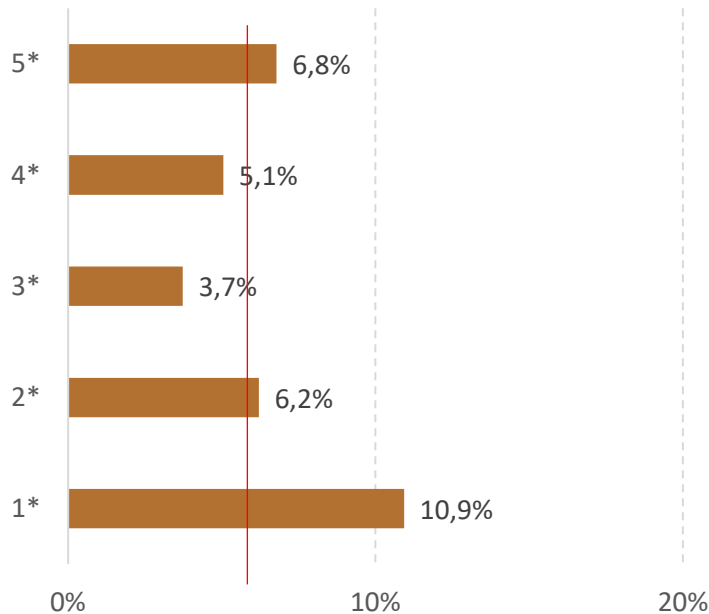


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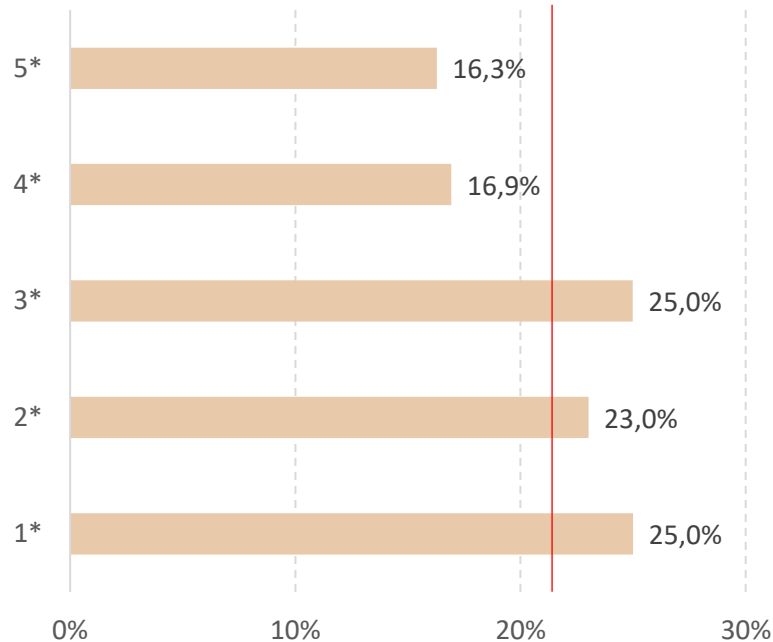


Measurable benefits from implementing sustainability actions*, by category

Attracts customers who are willing to pay extra premium for it (AVG. 5,7%)



I haven't seen any measurable benefits (AVG. 22,0%)



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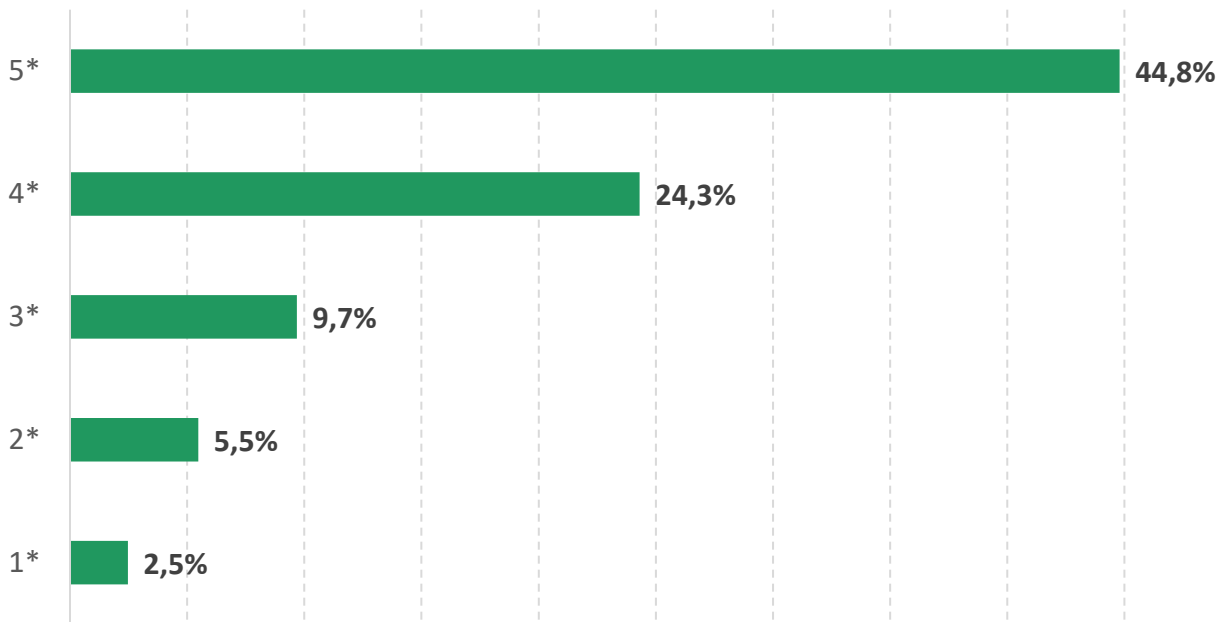
Possession of Certification regarding Environment–Energy–Sustainability

by Category



Possession of Certification regarding Environment–Energy–Sustainability, by category

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



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Implementation of sustainable practices: Barriers and need for facilitation

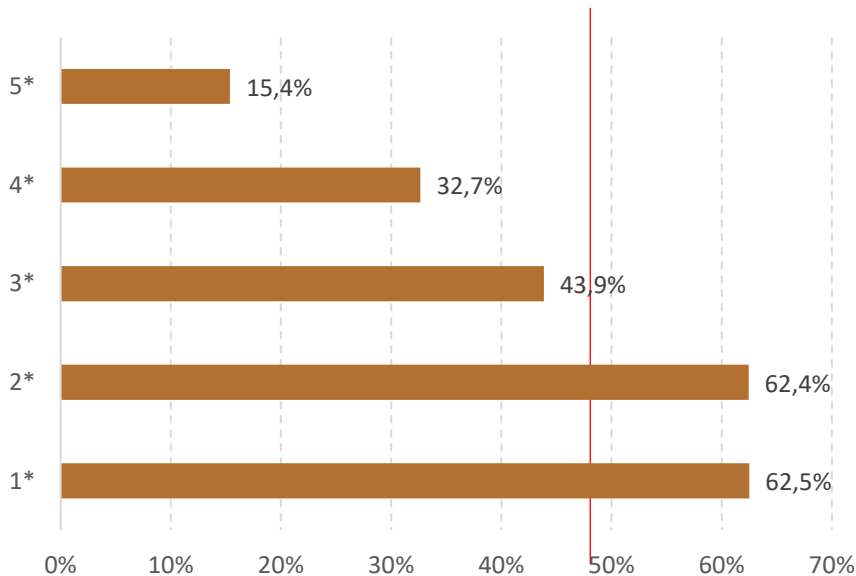
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by Category

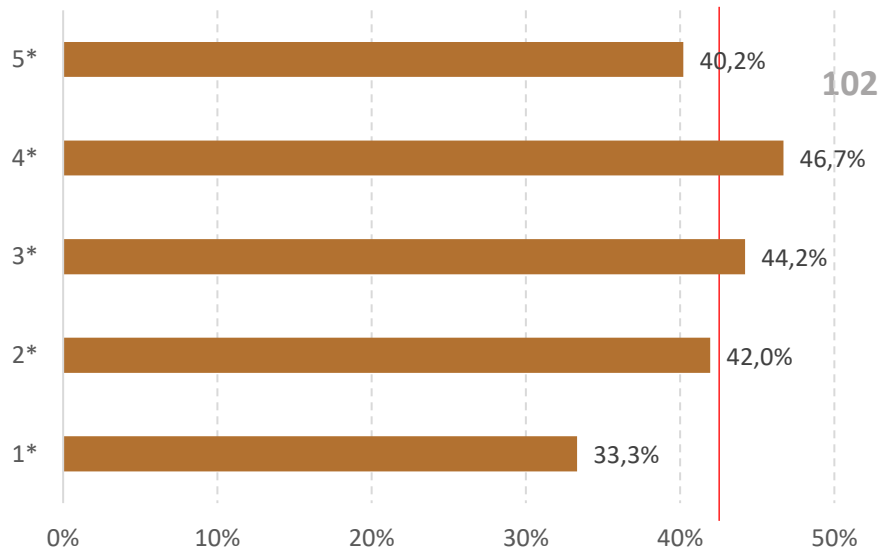


Barriers to implementing Sustainability Practices*, by category

Cash-flow shortage (AVG. 48,7%)



Small team and we have to prioritize other issues (AVG. 42,2%)

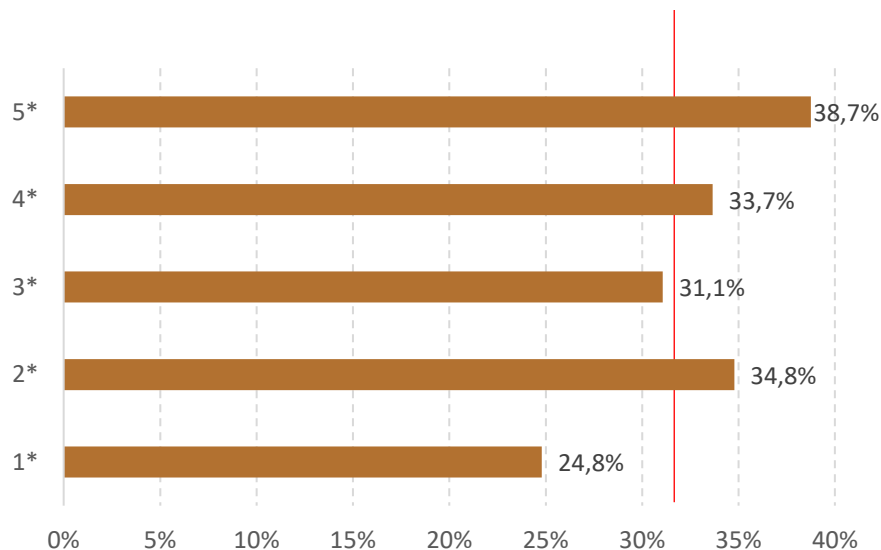


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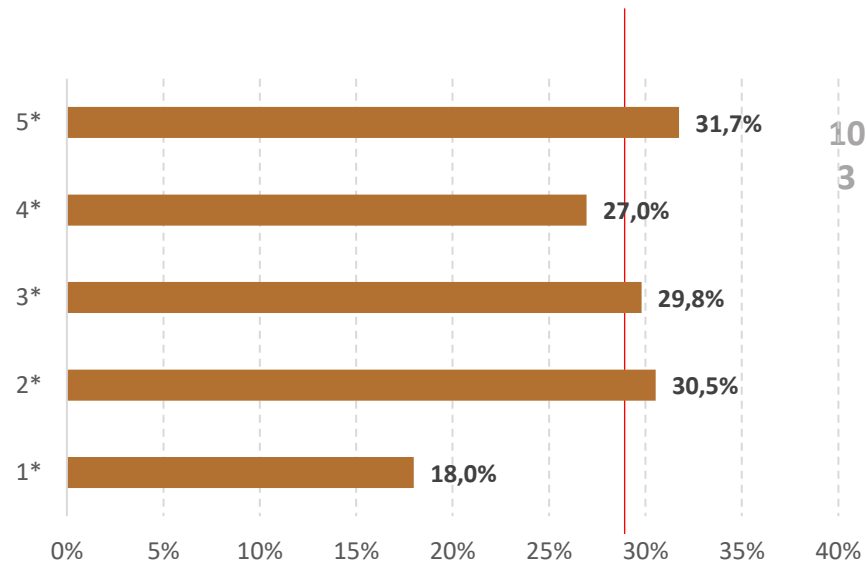


Barriers to implementing Sustainability Practices*, by category

*Lack of information on financial schemes
(AVG. 32,6%)*



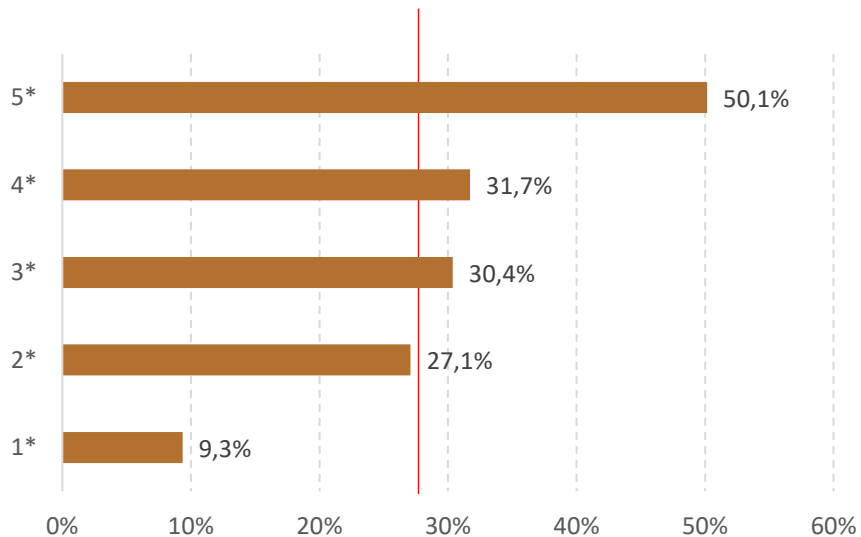
*Lack of information on sustainable
practices (AVG. 28,2%)*



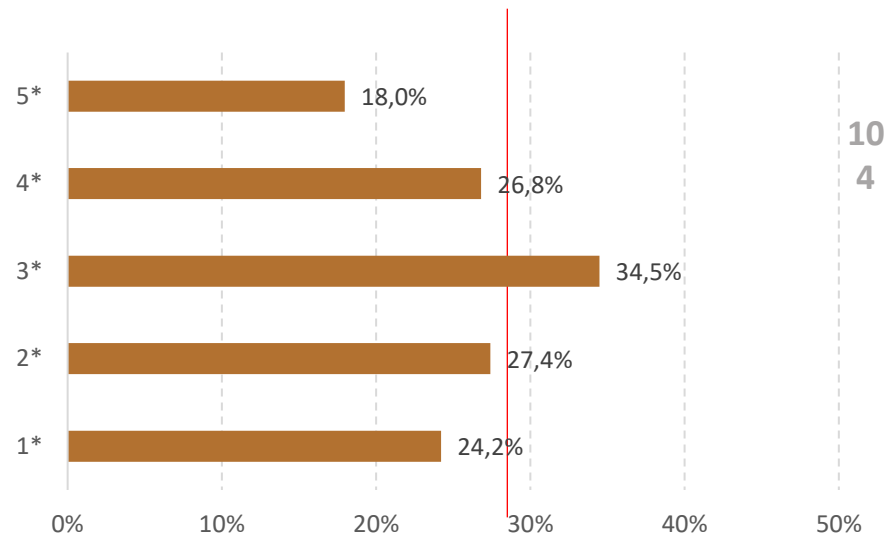


Barriers to implementing Sustainability Practices*, by category

Lack of specialized staff (AVG. 28,2%)



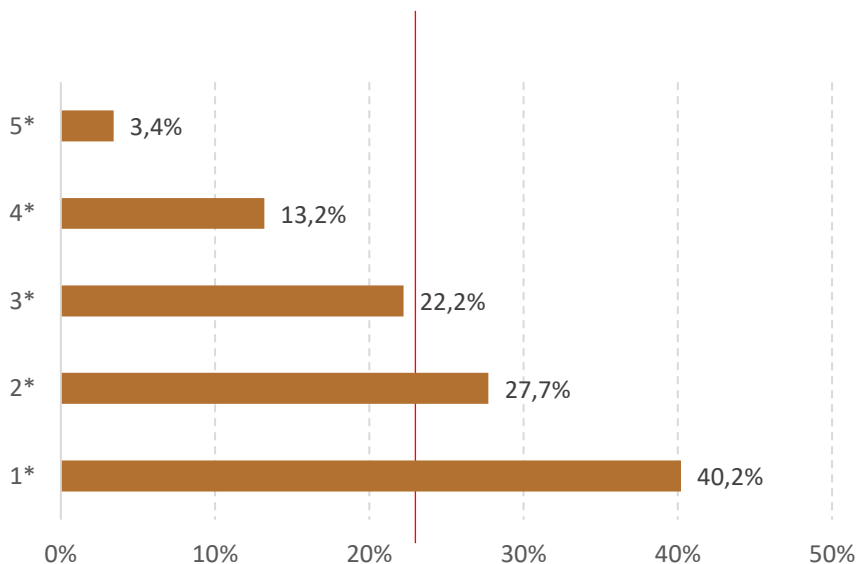
There is no personal time available (AVG. 28,2%)



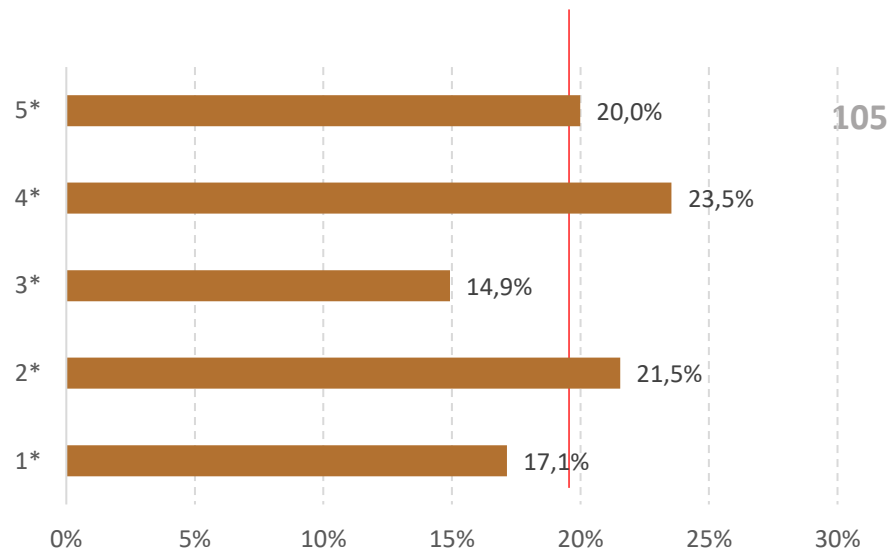


Barriers to implementing Sustainability Practices*, by category

*Inability to participate in financial schemes
(AVG. 23,5%)*



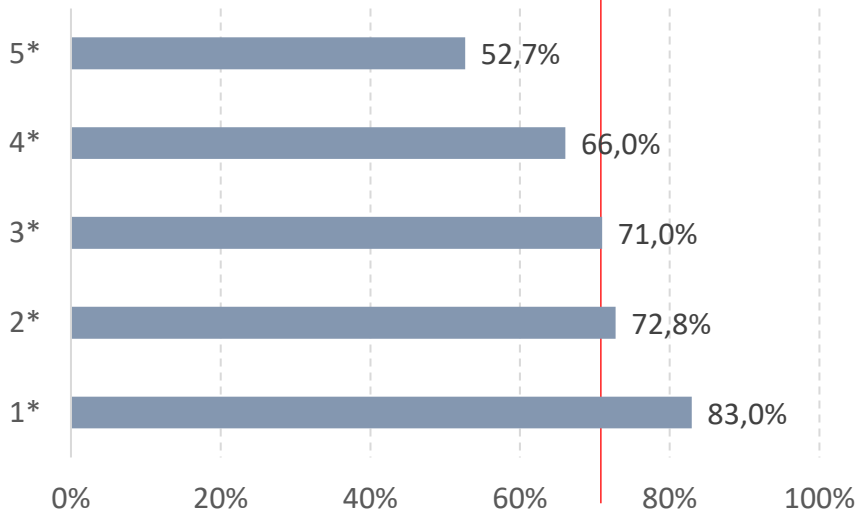
*Lack of know-how/experience to prepare the
file & submit the proposal (AVG. 19,4%)*



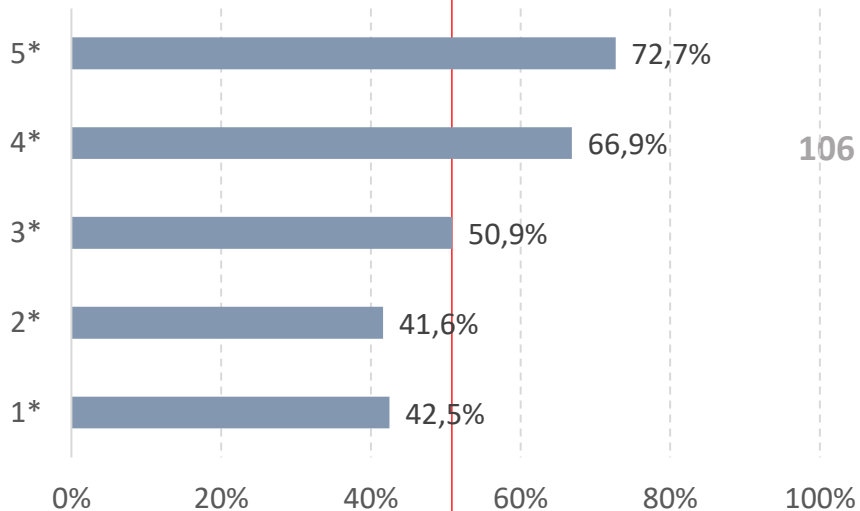


Facilitations for implementation or expansion of Sustainability Practices in the hotel*, by category

Funding (AVG. 71,0%)



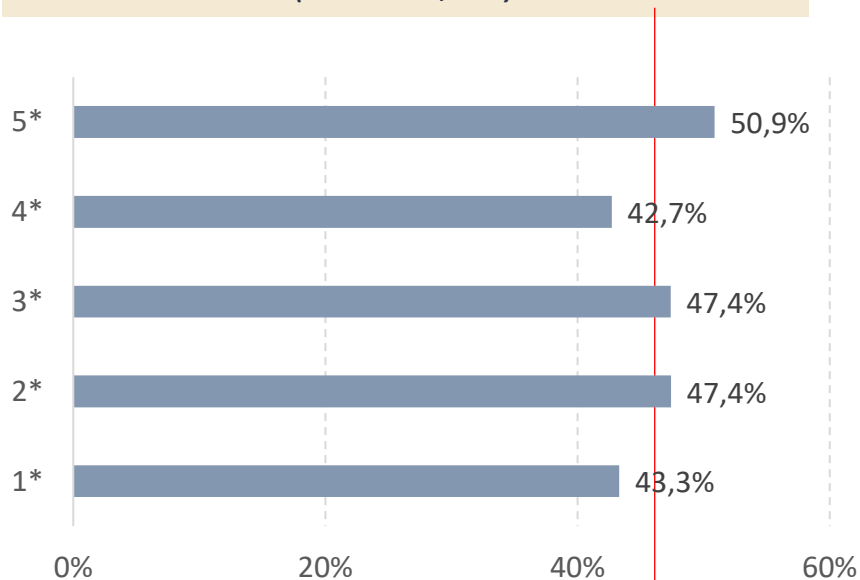
Education / training for me and my staff (AVG. 50,9%)



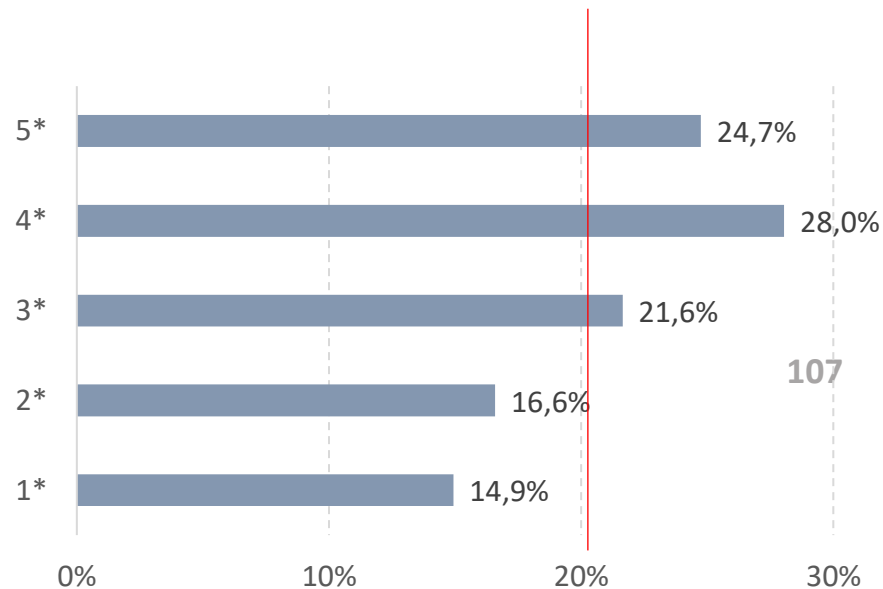


Facilitations for implementation or expansion of Sustainability Practices in the hotel*, by category

*Information on sustainability practices
tailored to the needs of my business
(AVG. 46,3%)*



*Cooperation with external consultants on
sustainability issues (AVG. 20,4%)*



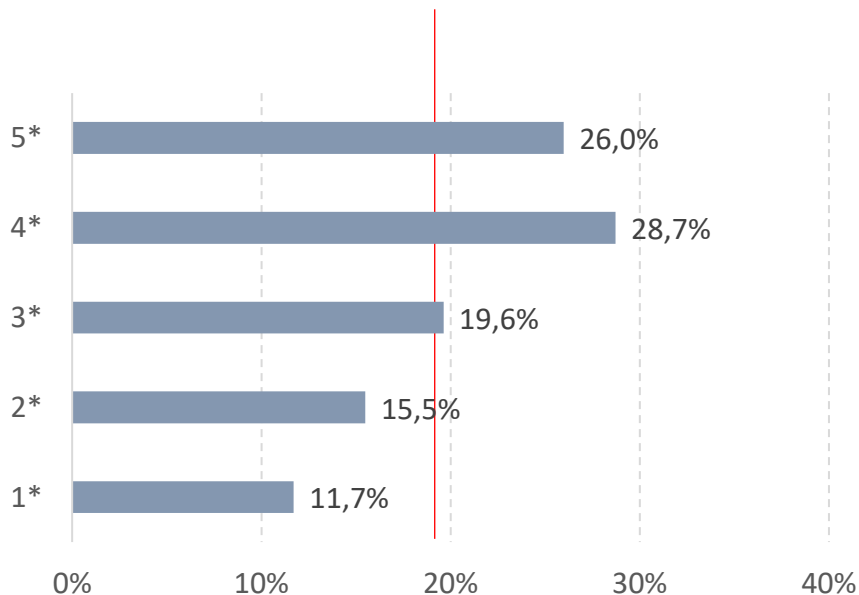
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* Multiple choice questions.

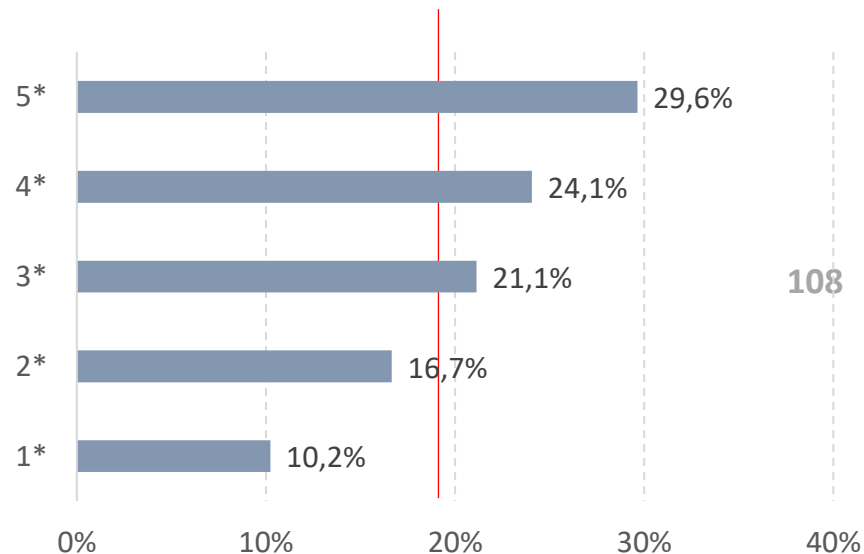


Facilitations for implementation or expansion of Sustainability Practices in the hotel*, by category

*Finding trained/specialized staff
(AVG. 19,2%)*



Acquiring financial resources to hire trained/specialized staff (AVG. 19,3%)

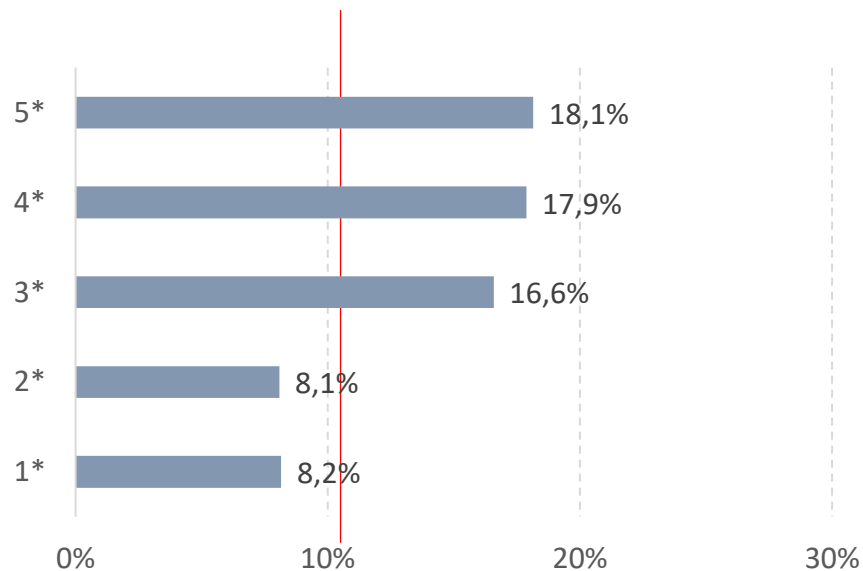


108

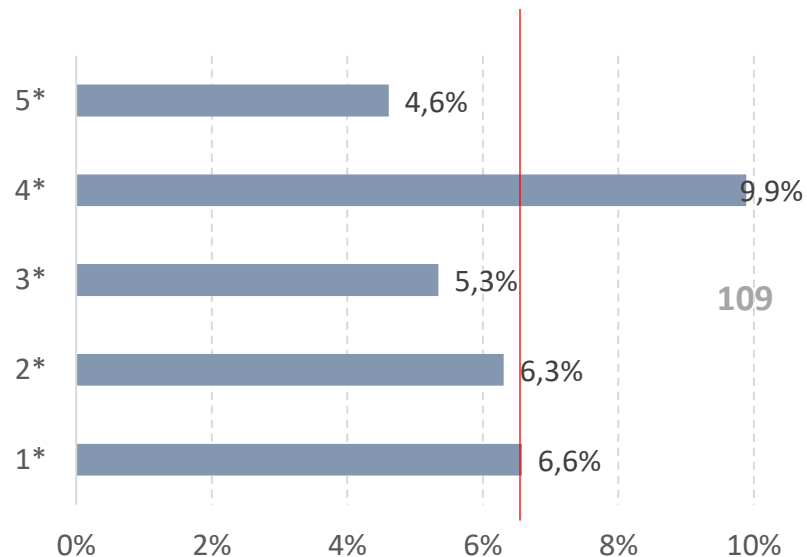


Facilitations for implementation or expansion of Sustainability Practices in the hotel*, by category

Appoint a person who will deal with the sustainability issues of my business
(AVG. 12,9%)



Support from DMO (AVG. 6,6%)



109

* Multiple choice questions.



**Assessment of knowledge on
sustainability issues**

110



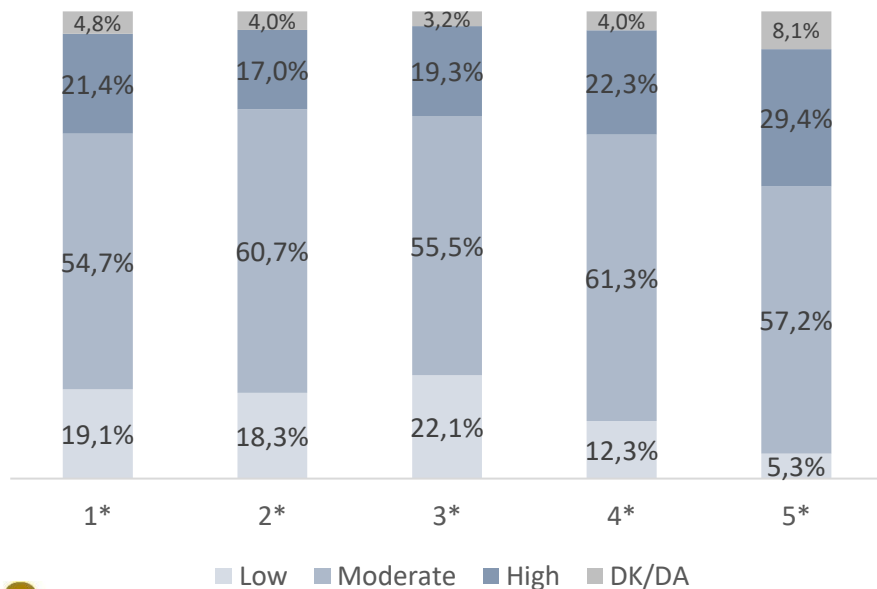
**Knowledge of the educational program
“Grow Greece with Google”**

by Category

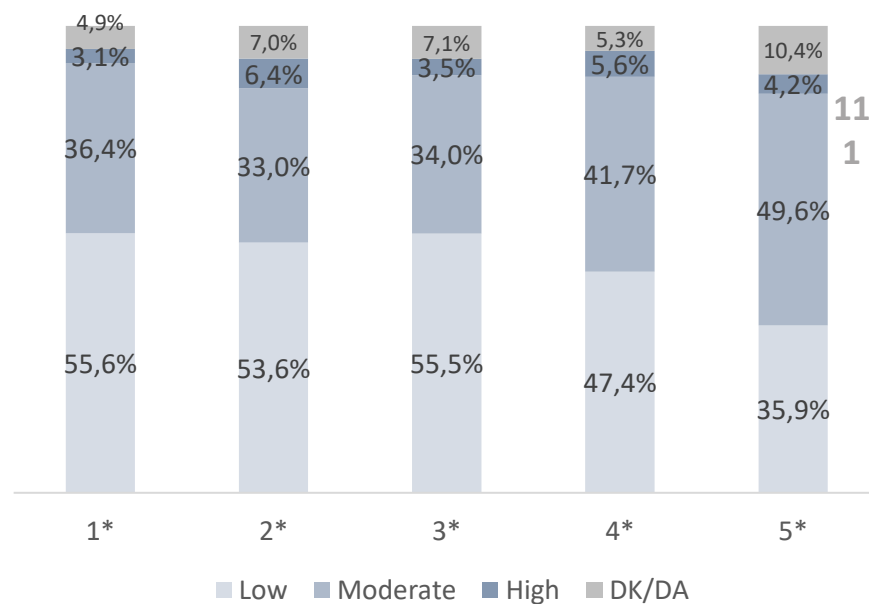


Assessment of knowledge on sustainability issues, by category

Self-assessment of hoteliers **GENERALLY**
on environmental sustainability issues.



Evaluation of the level of knowledge of the Staff
regarding the implementation of sustainability
good practices in the hotel



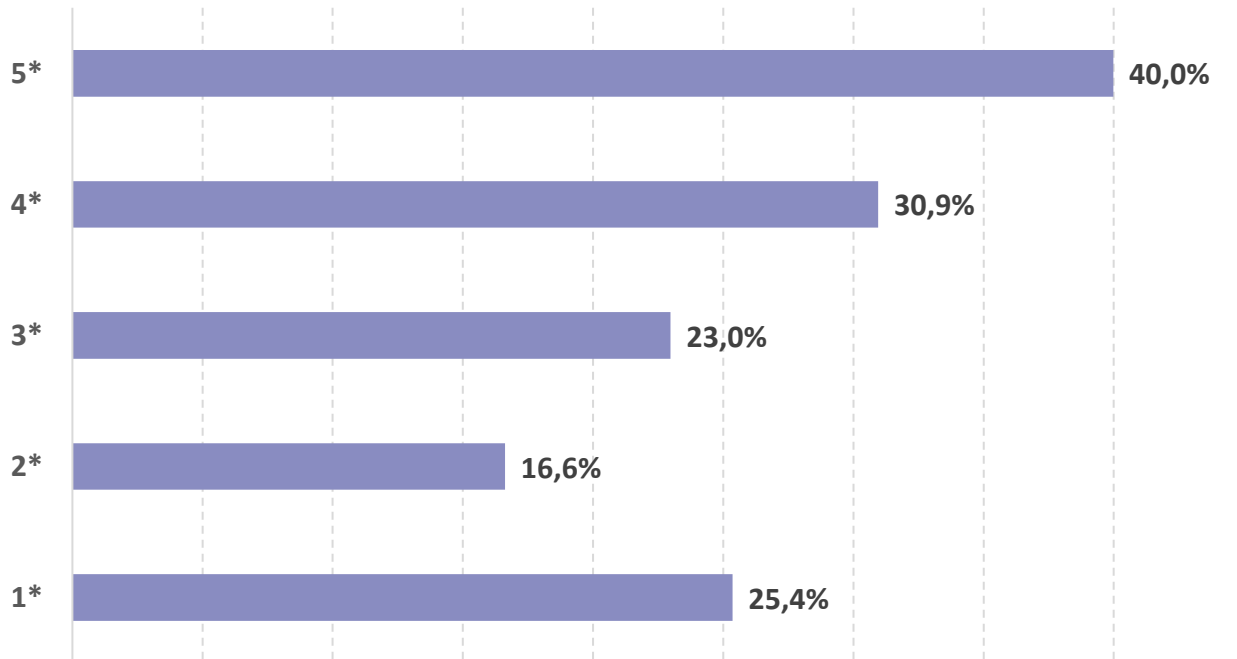
11
1



"Grow Greece with Google", by category



Grow with Google





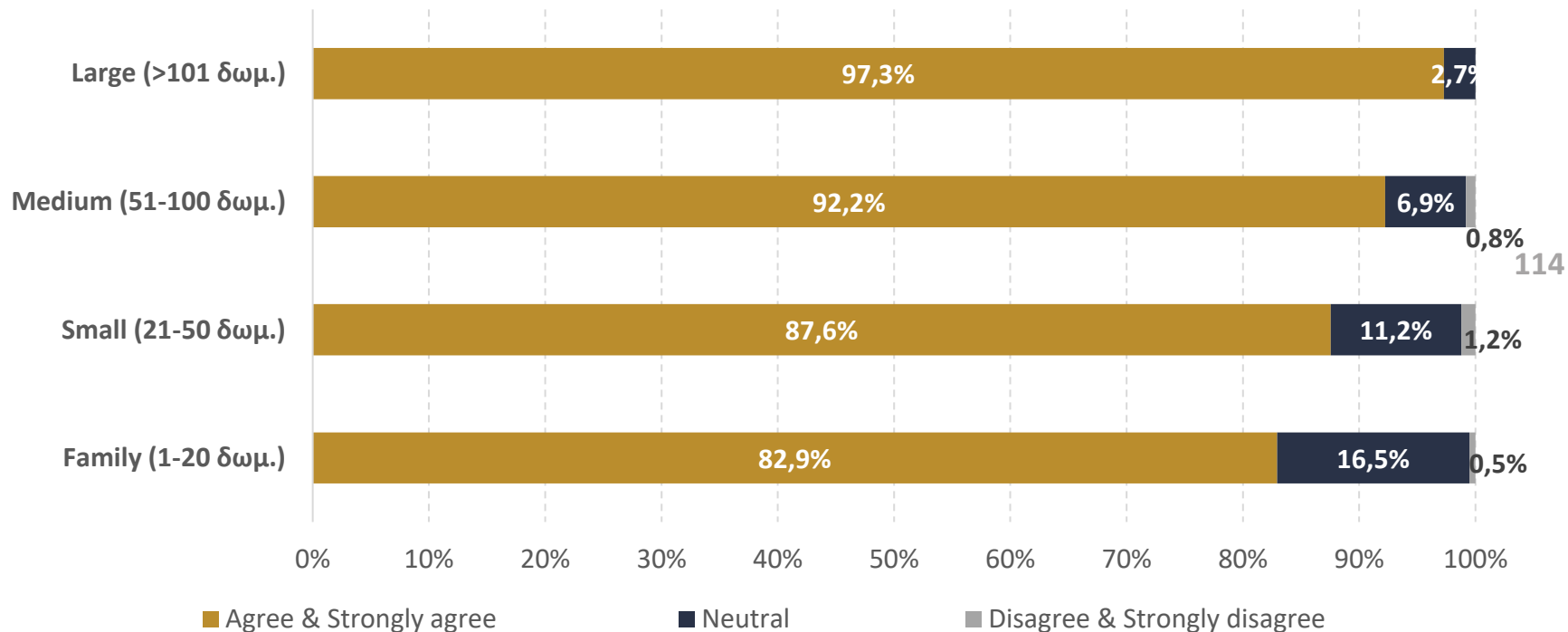
04

Analysis based on Hotel Size

113



Importance of sustainability practices for the hotel operation 2023, based on size

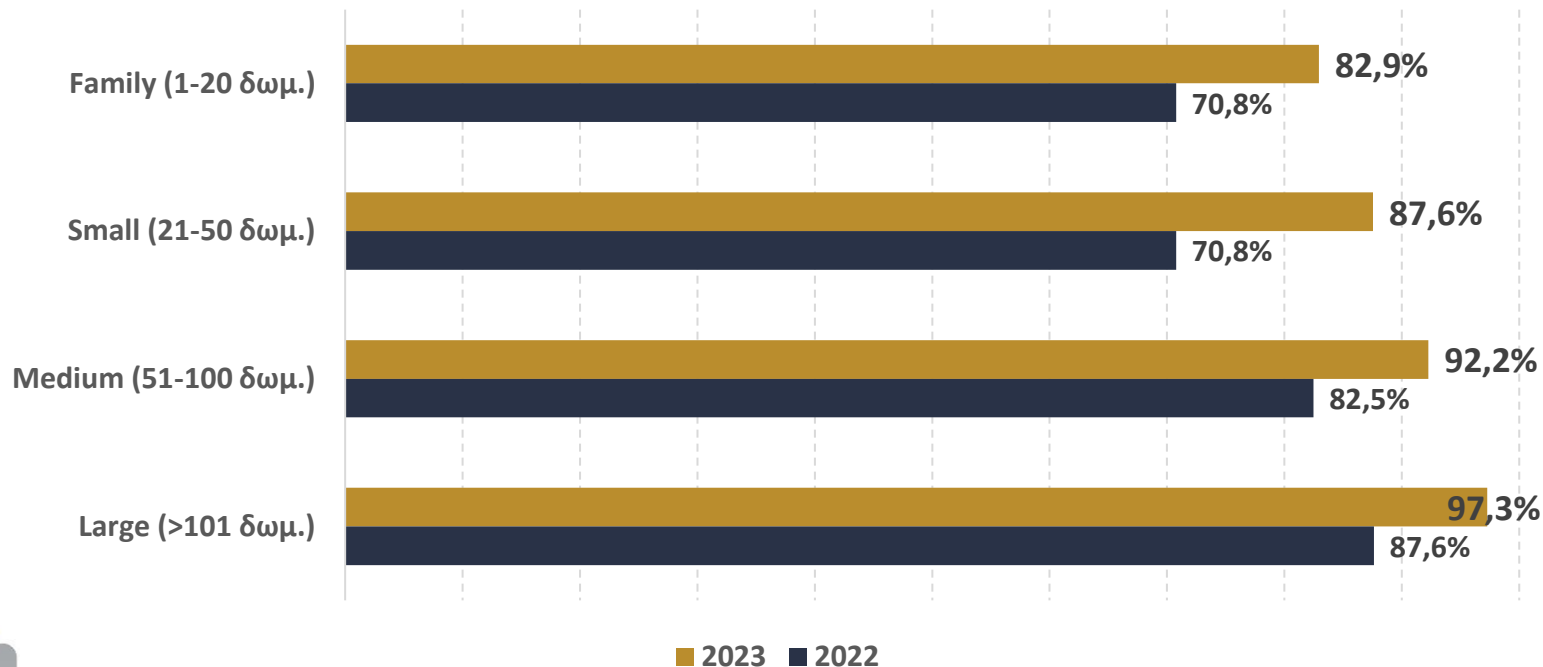


114



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

Comparative response rate
"Agree & Strongly Agree"

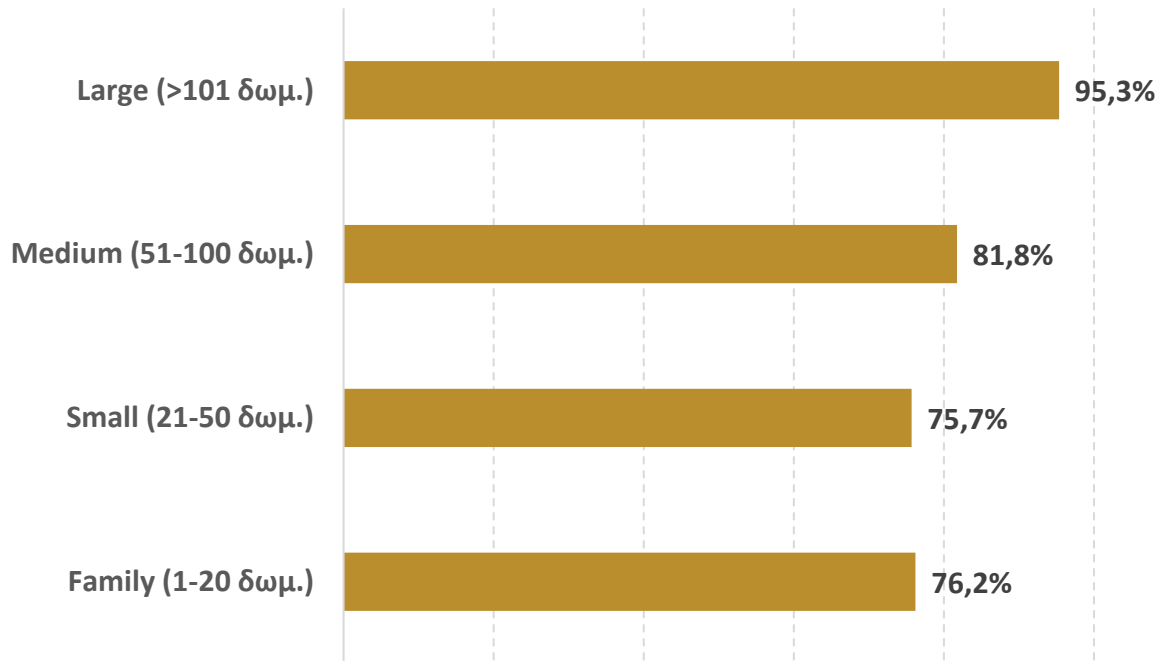




Hotels that have or plan to implement sustainability practices, based on size



of hotels that have or intend to implement sustainable practices





Main reason for adopting sustainability practices

based on Size

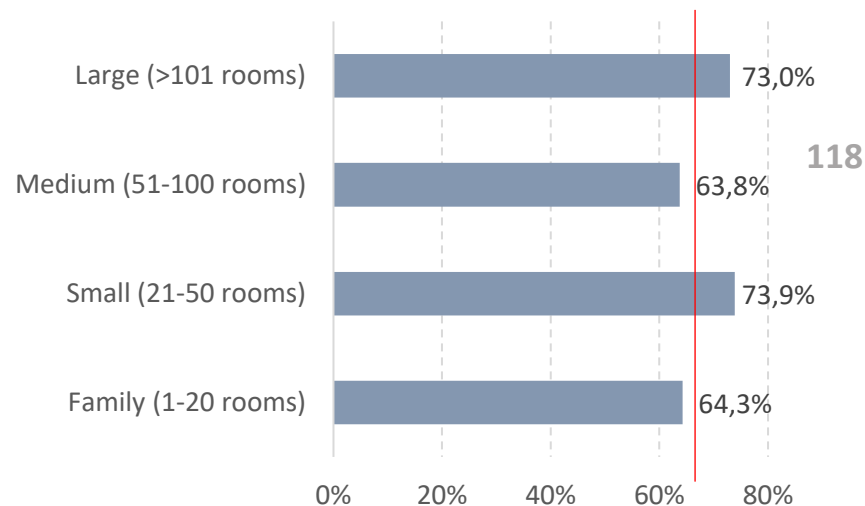
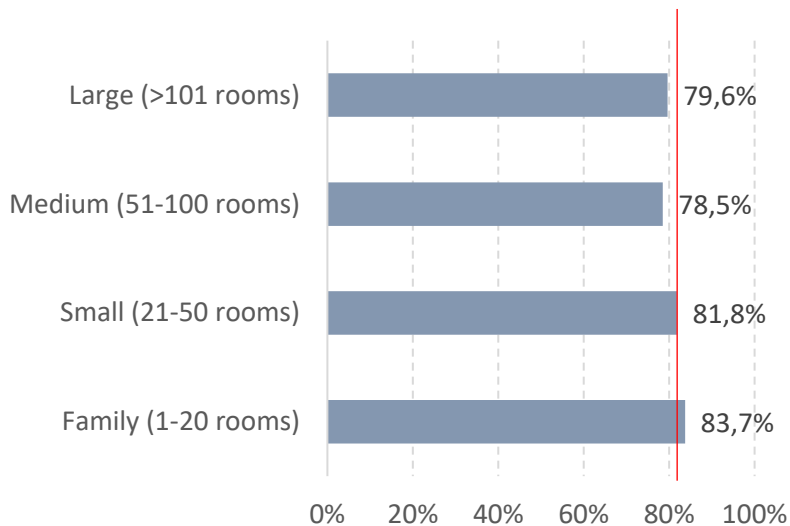
117



Main reason for adopting sustainability practices *, based on size (It refers to 78% of the respondents)

It is my personal belief that we all must protect the planet (AVG. 81,9%)

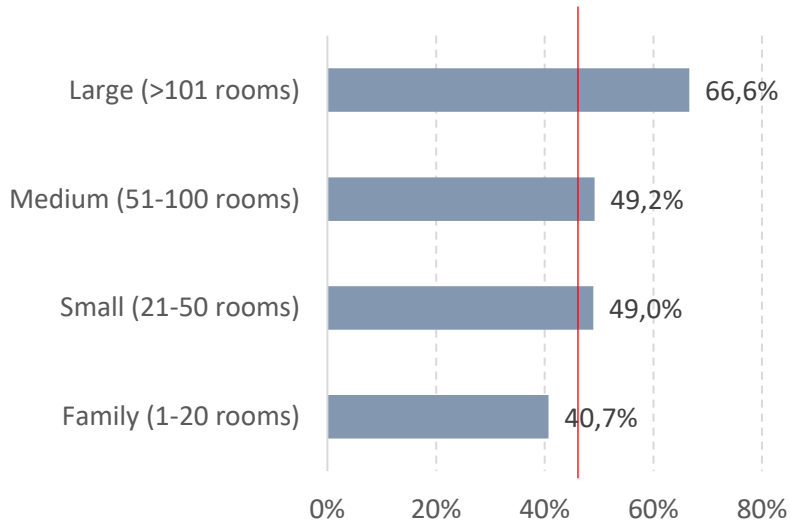
They help sparing money (AVG. 68,7%)



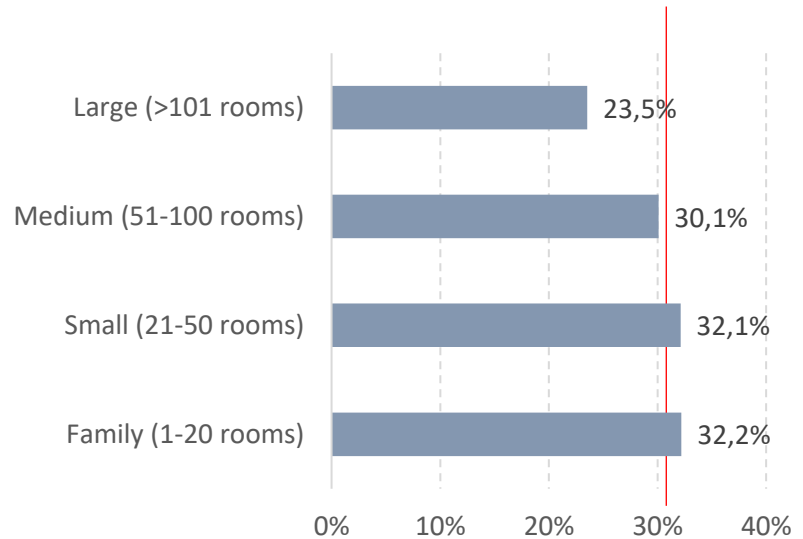


Main reason for adopting sustainability practices *, based on size (It refers to 78% of the respondents)

My clients are interested (AVG. 47,5%)



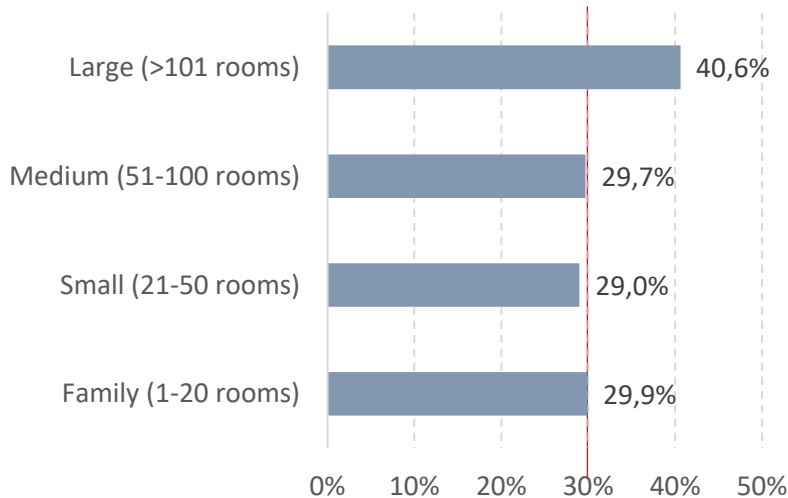
I do not want to fall behind (AVG. 31,0%)



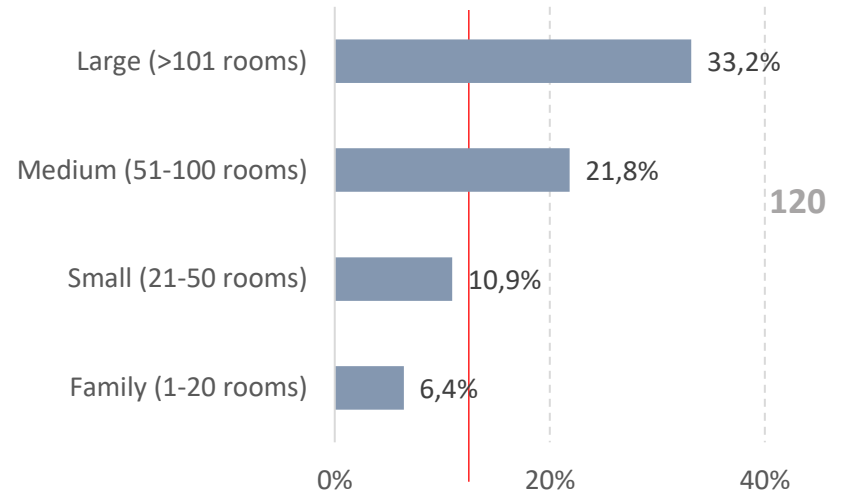


Main reason for adopting sustainability practices *, based on size (It refers to 78% of the respondents)

They make the difference in the market and I can communicate it through several channels
(AVG. 30,6%)



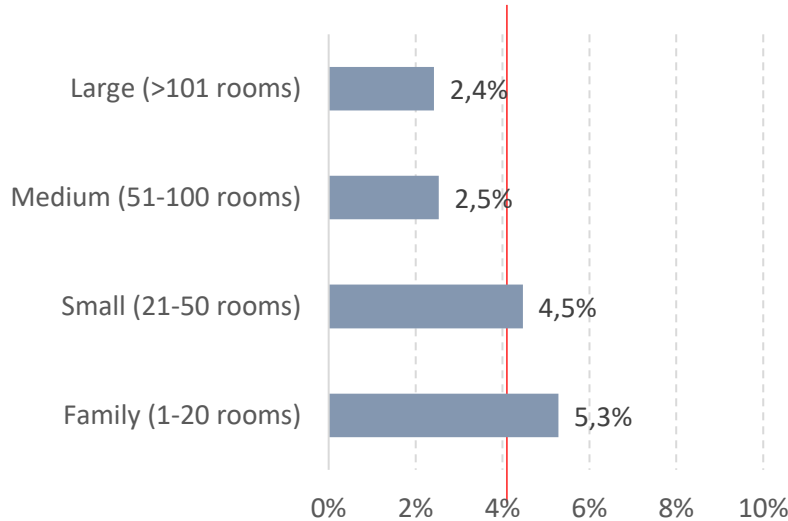
It is mandatory by the law
(AVG. 12,8%)





Main reason for adopting sustainability practices *, based on size (It refers to 78% of the respondents)

I can charge an extra premium (AVG. 4,3%)



Main reason for NOT adopting sustainability practices

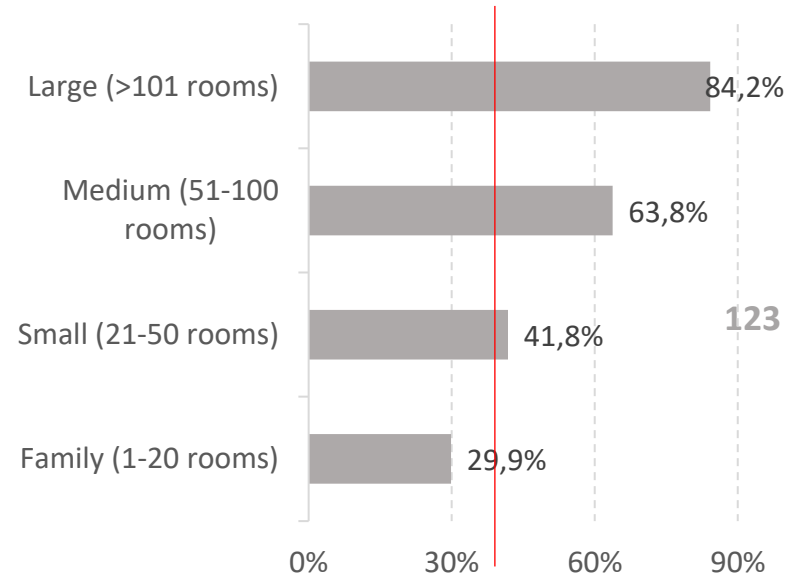
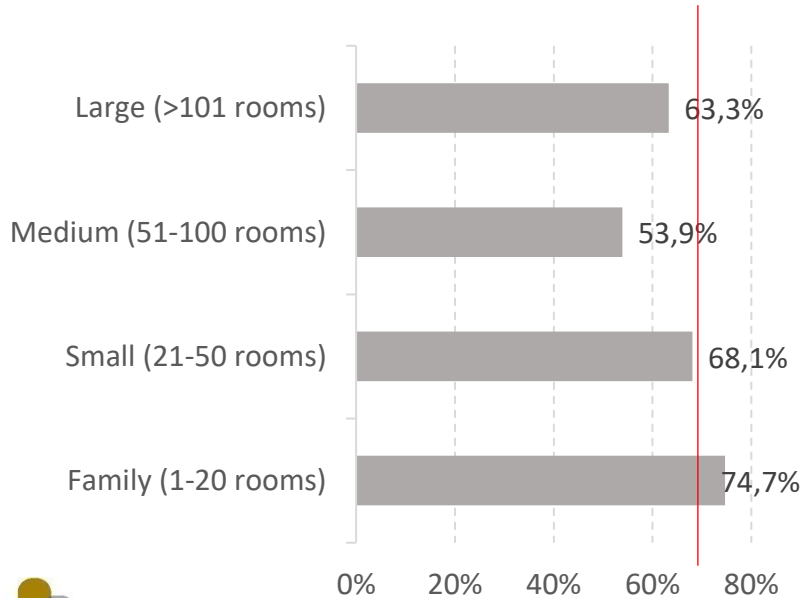
based on Size



Main reason for adopting sustainability practices *, based on size (It refers to 22% of the respondents)

I do not have the money to materialize such an investment (AVG. 69,5%)

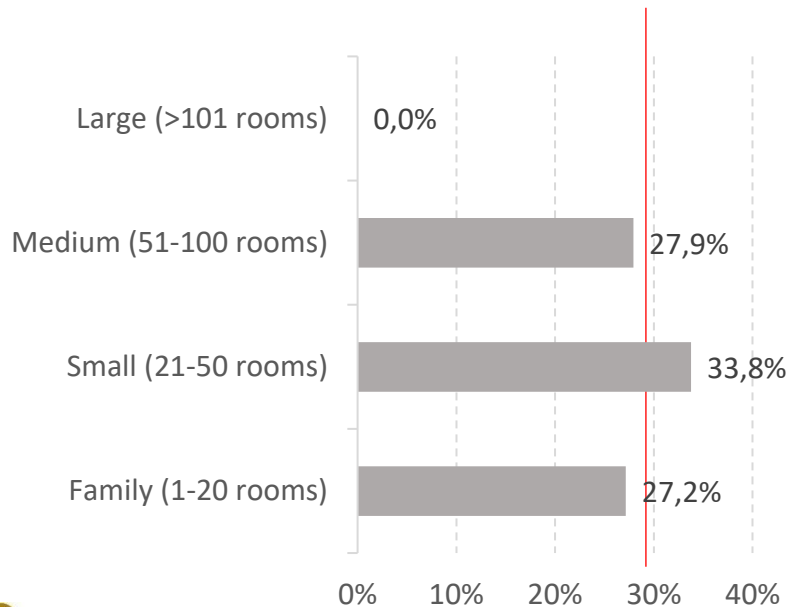
I do not have properly educated/specialized people to materialize such an investment (AVG. 39,5%)



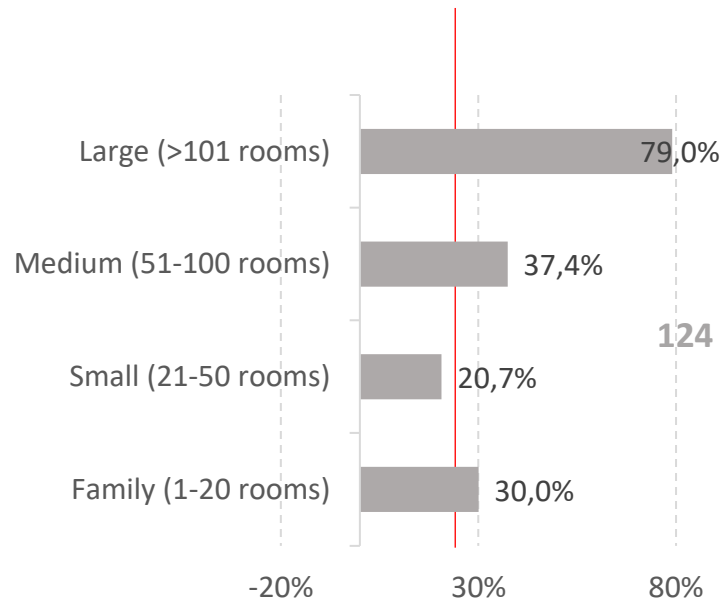


Main reason for adopting sustainability practices *, based on size (It refers to 22% of the respondents)

I do not have the time to organize such an investment (AVG. 29,6%)



I do not have proper information of how to adopt sustainability practices (AVG. 27,7%)



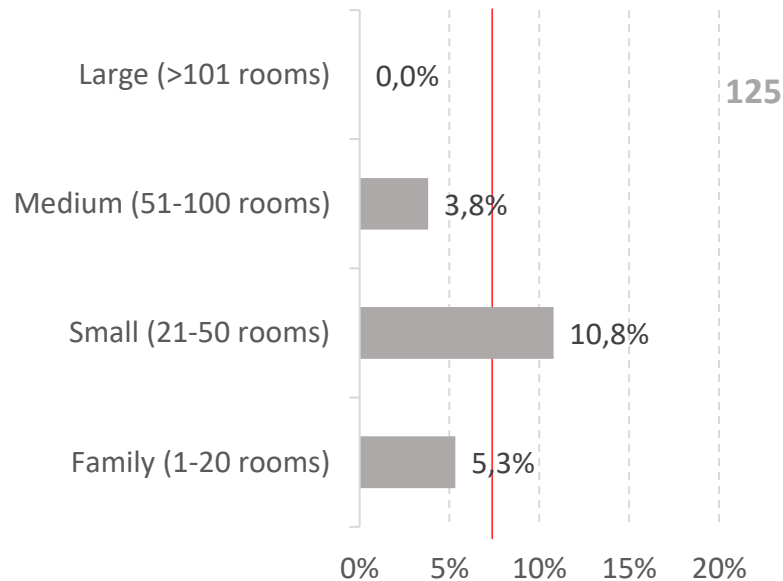
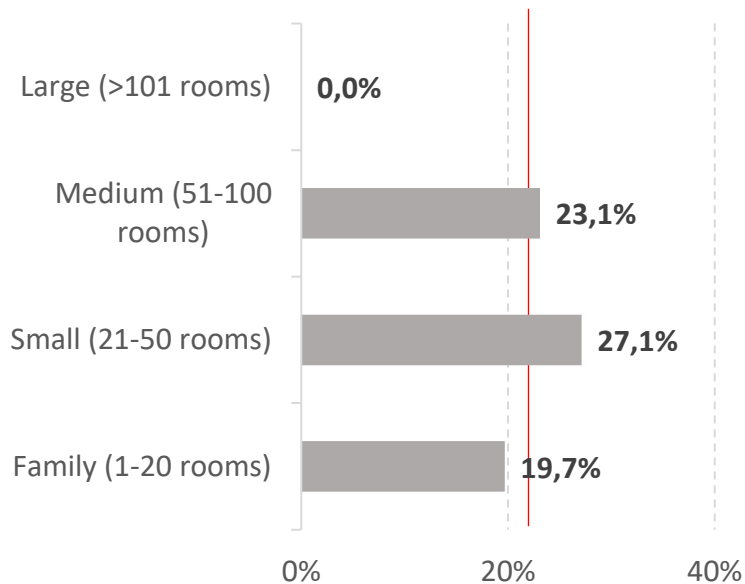
* Multiple choice questions.



Main reason for adopting sustainability practices *, based on size (It refers to 22% of the respondents)

I am not eligible to participating in funding schemes (AVG. 22,9%)

It is not a selection criterion for my clients (AVG.7,4%)



125

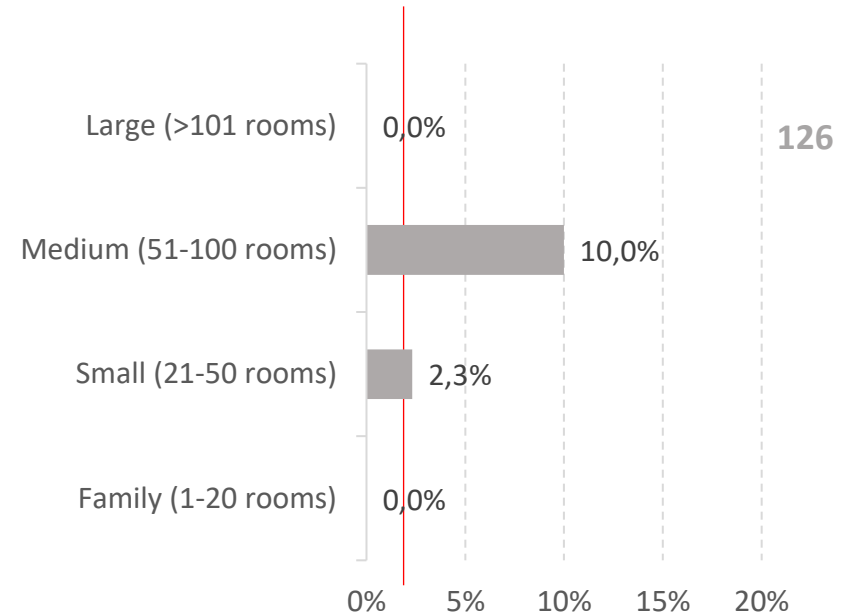
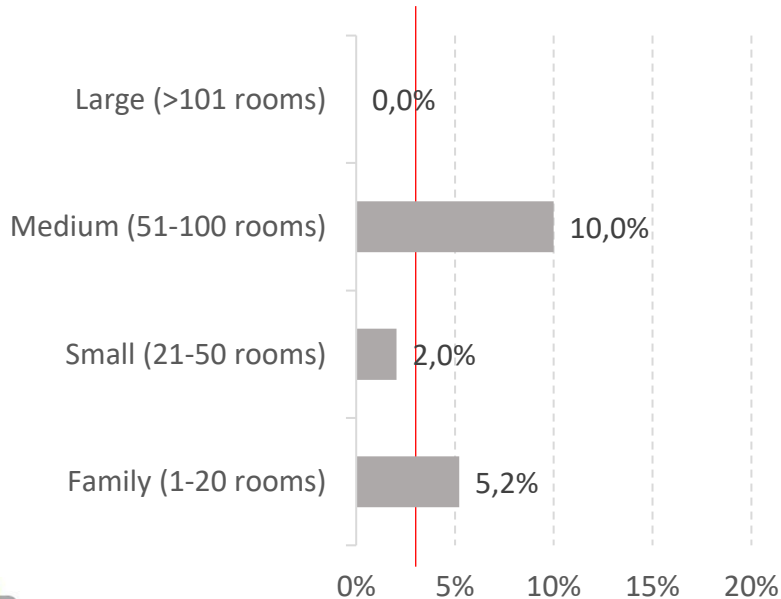
* Multiple choice questions.



Main reason for adopting sustainability practices *, based on size (It refers to 22% of the respondents)

My other colleagues do not apply them either (AVG. 4,3%)

I do not consider such an investment to be profitable (AVG. 2,0%)





Strategy and Management Actions to promote sustainability

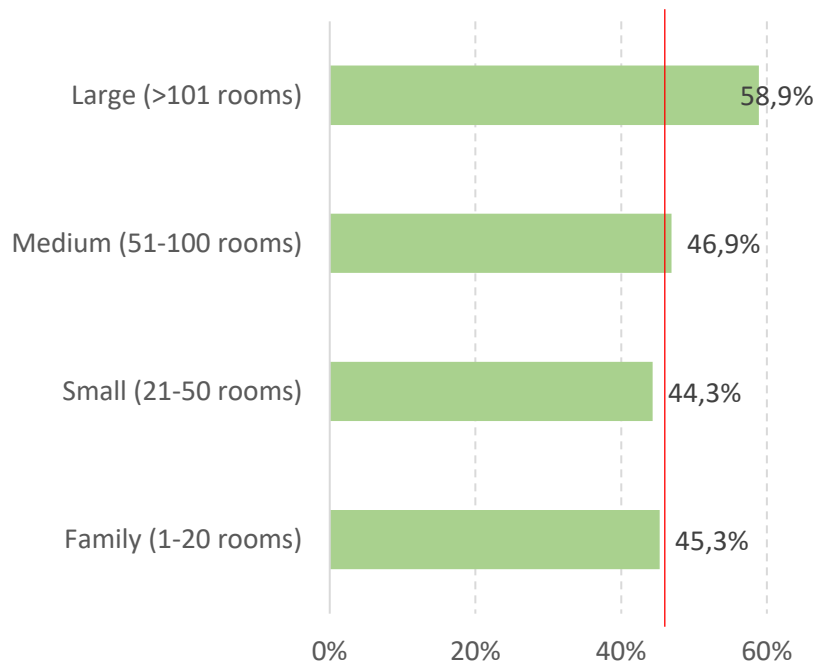
127

based on Size

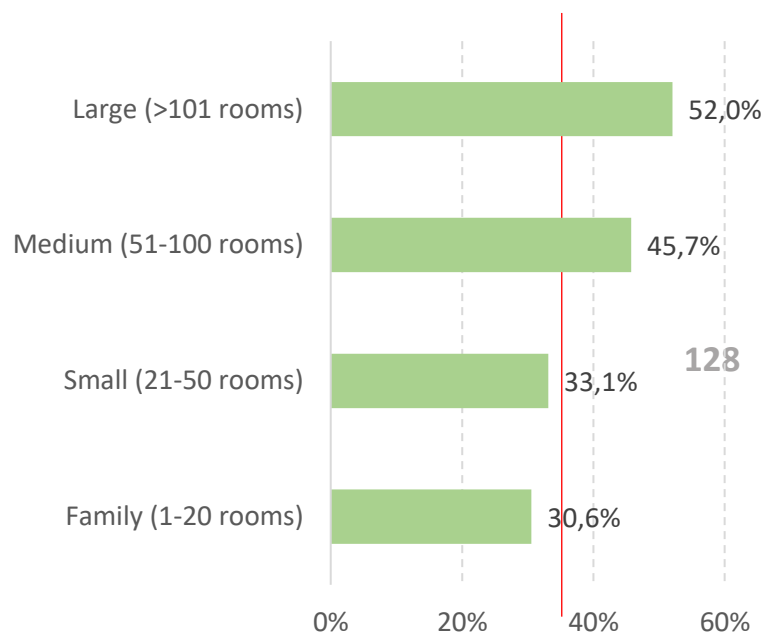


Strategy and Management: Actions to promote sustainability, based on size

I have set specific goals to improve the sustainability of my hotel (AVG. 46,3%)



I have been educated about it (AVG. 35,2%)



128

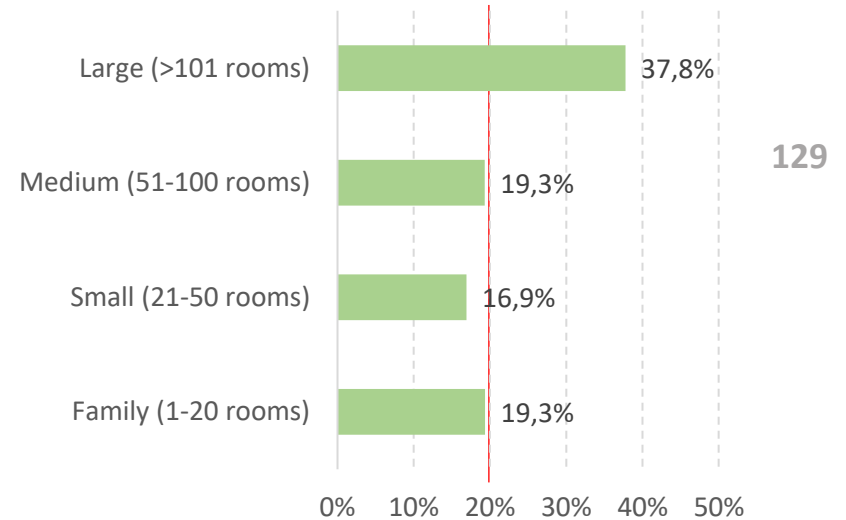
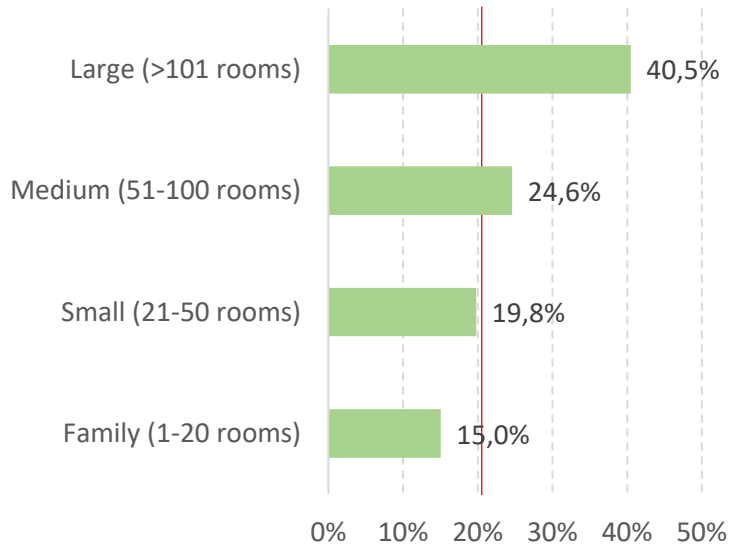
* Multiple choice questions.



Strategy and Management: Actions to promote sustainability, based on size

I have trained my staff (AVG. 20,2%)

I communicate my sustainability actions and practices to my clients (AVG. 20,0%)

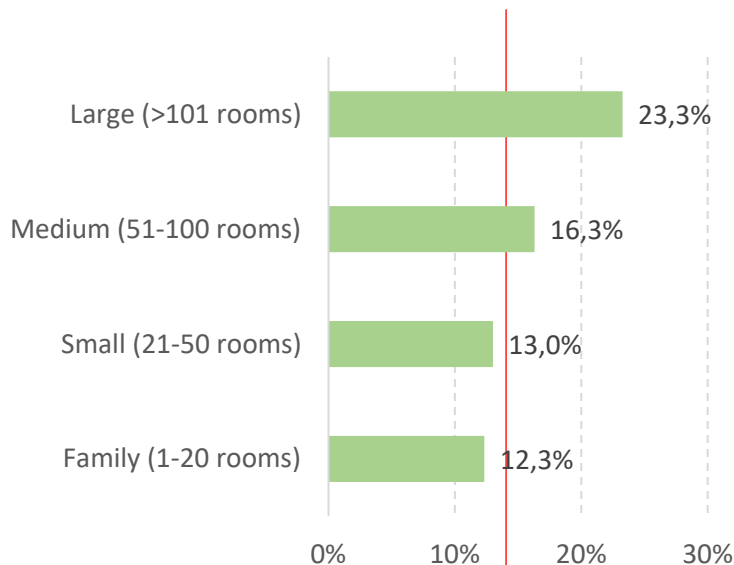


129

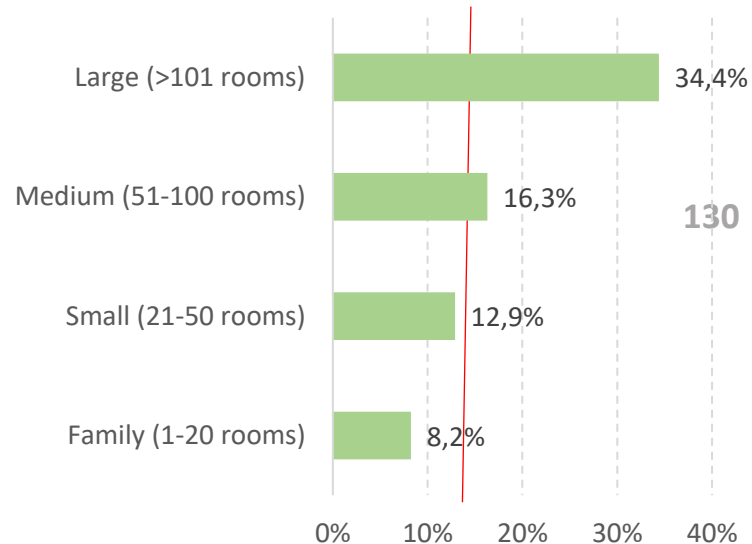


Strategy and Management: Actions to promote sustainability, based on size

I have budgeted a specific amount for the implementation of sustainability practices (AVG. 14,0%)



I have implemented a strategic sustainability plan (AVG. 13,2%)



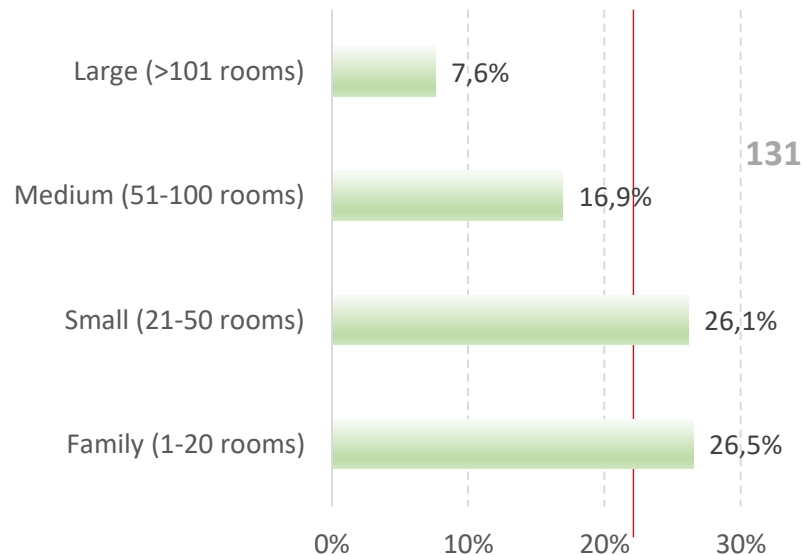
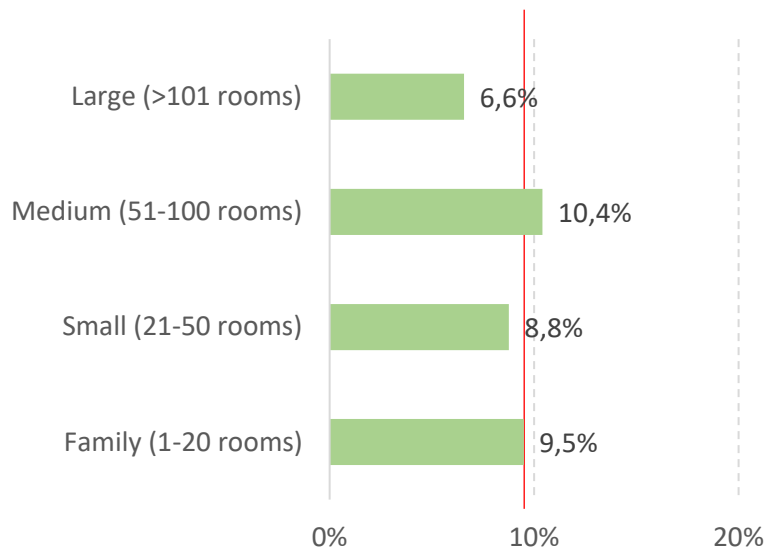
* Multiple choice questions.



Strategy and Management: Actions to promote sustainability, based on size

I have applied to join a funding scheme for sustainable practices (AVG. 9,1%)

None (AVG. 23,6%)





Monitoring and Measuring of important hotel sustainability variables

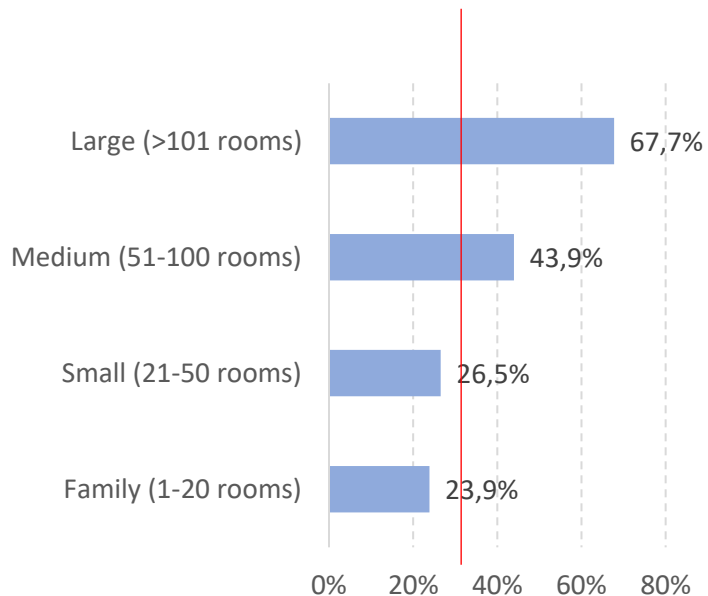
132

based on Size

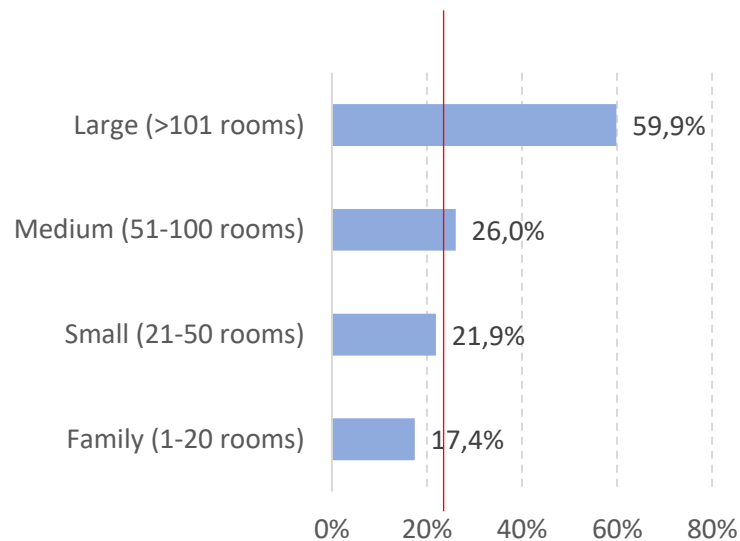


Monitoring and Measuring of important hotel sustainability variables*, based on size

*Energy consumption measurement-
monitoring systems (AVG. 31,1%)*



*Water consumption measurement-
monitoring systems (AVG. 23,8%)*



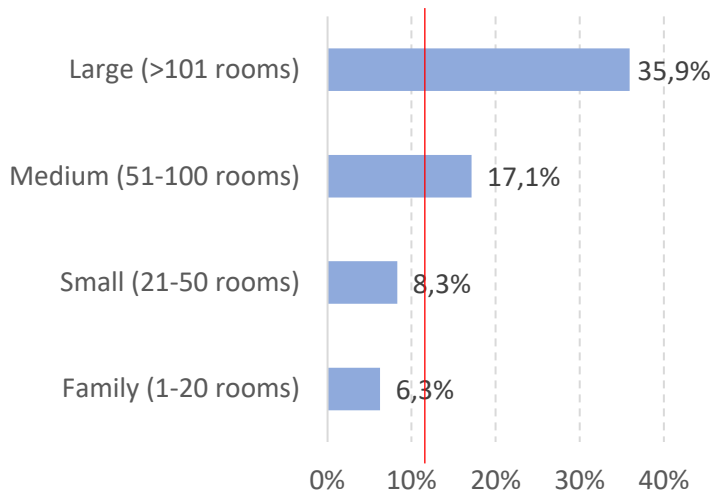
133

* Multiple choice questions.

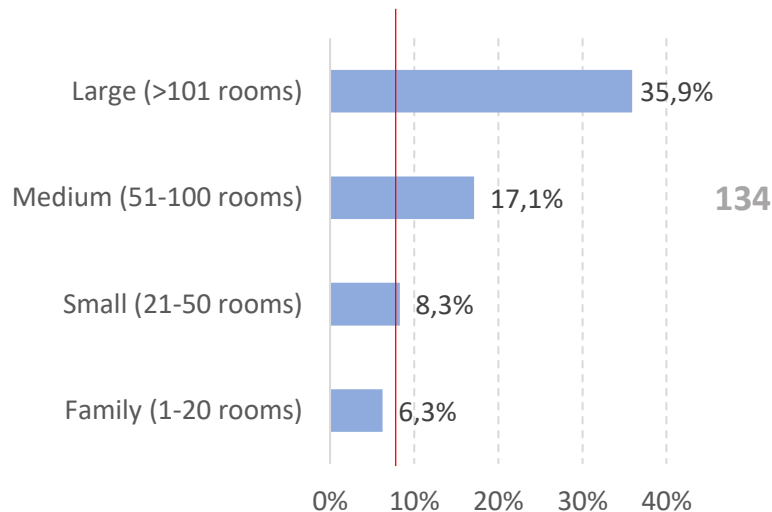


Monitoring and Measuring of important hotel sustainability variables*, based on size

*Food waste measurement-monitoring systems
(AVG. 10,9%)*



*Measurement-monitoring systems for
solid waste (AVG. 8,1%)*

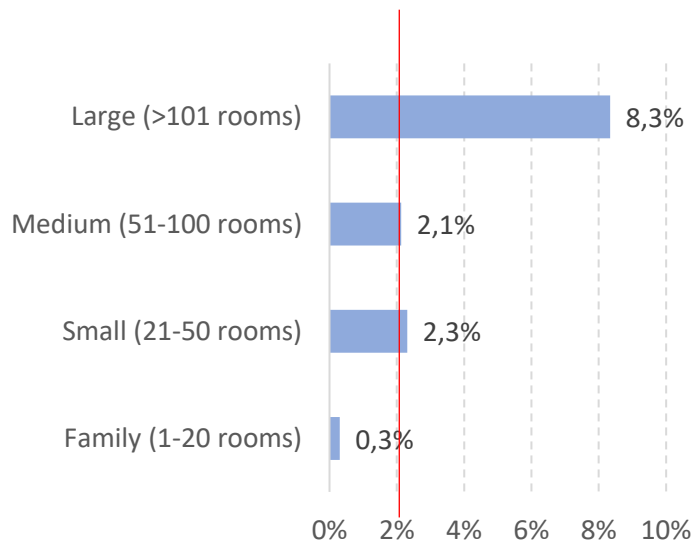


134

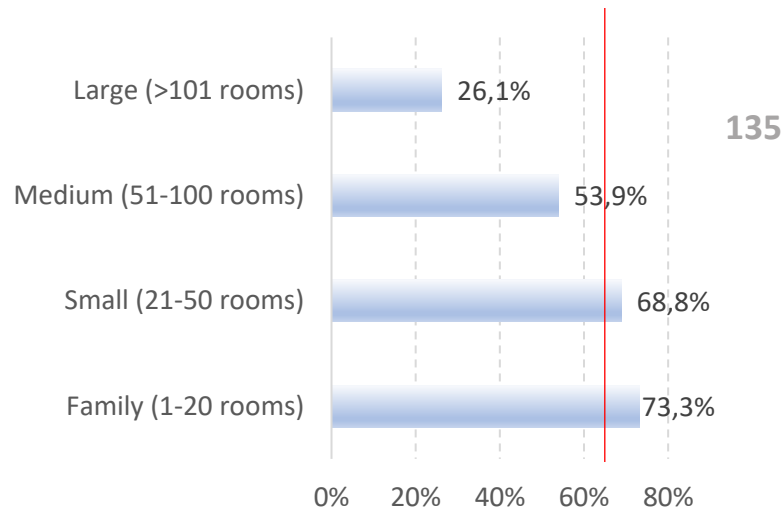


Monitoring and Measuring of important hotel sustainability variables*, based on size

Measurement-monitoring systems for CO2 emissions (AVG. 2,0%)



I haven't installed a sustainability metrics system yet (AVG. 65,1%)



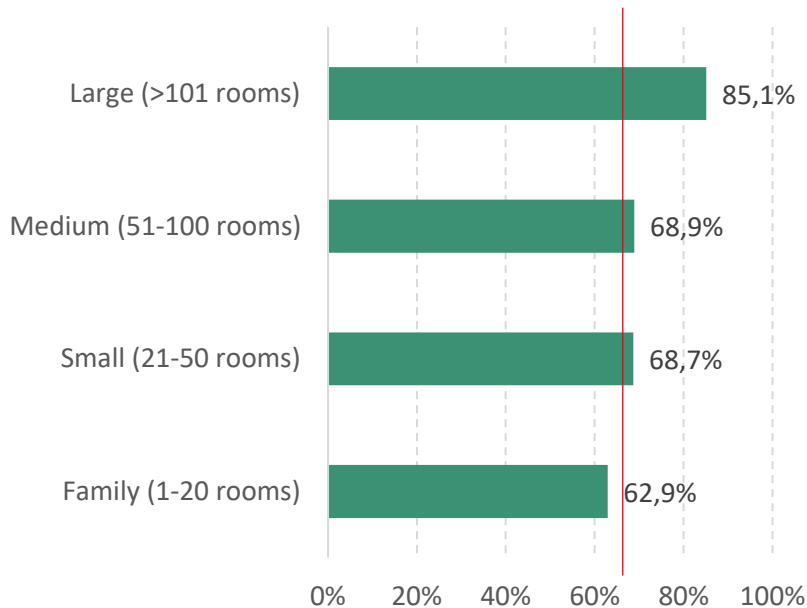
Hotel investments in sustainability practices

based on Size

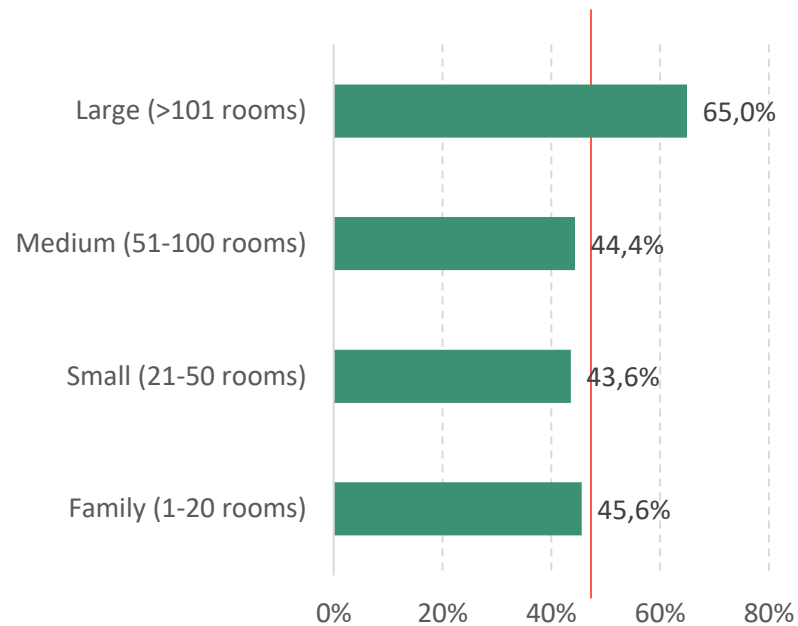


Hotel investments in sustainability practices*, based on size

Reducing energy consumption
(AVG. 67,7%)



Waste recycling (AVG. 46,3%)

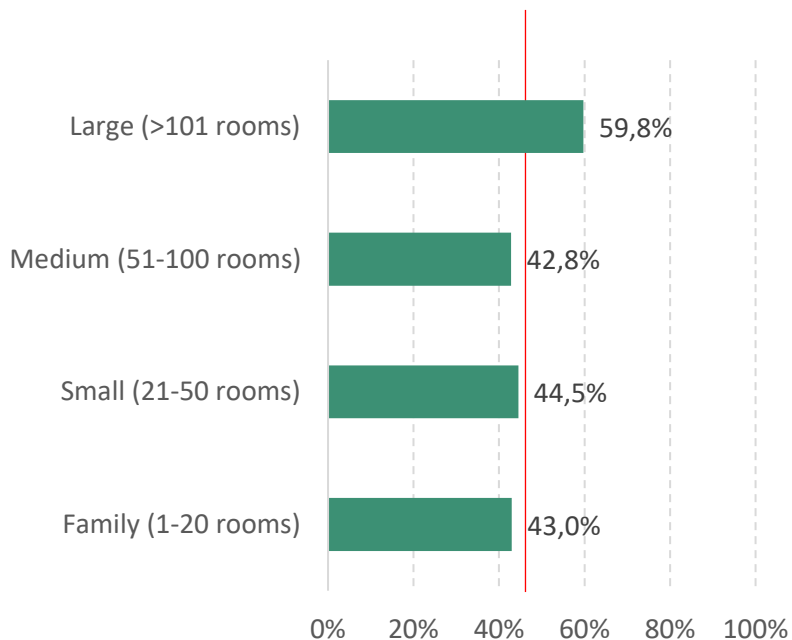


137

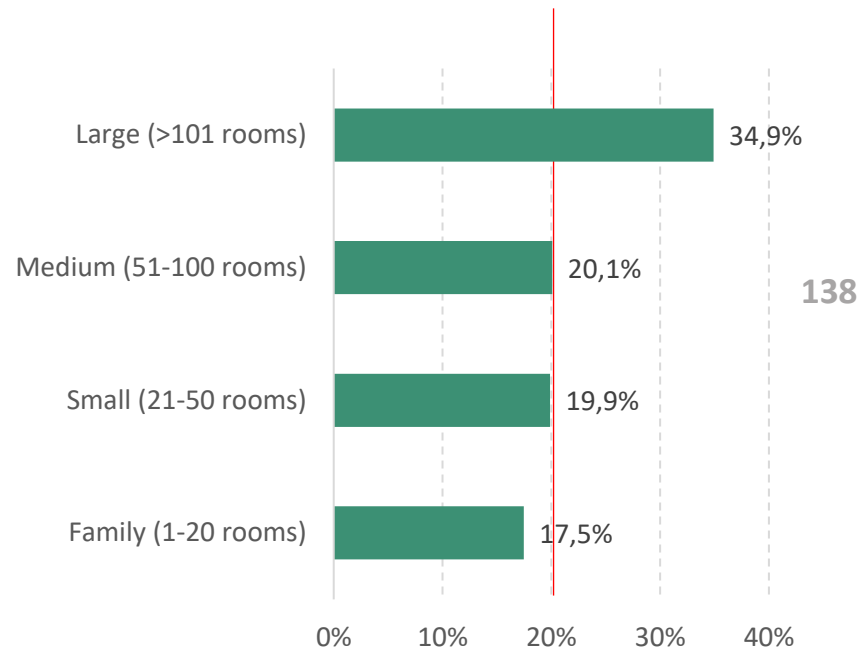


Hotel investments in sustainability practices*, based on size

Reducing water consumption (AVG. 45,0%)



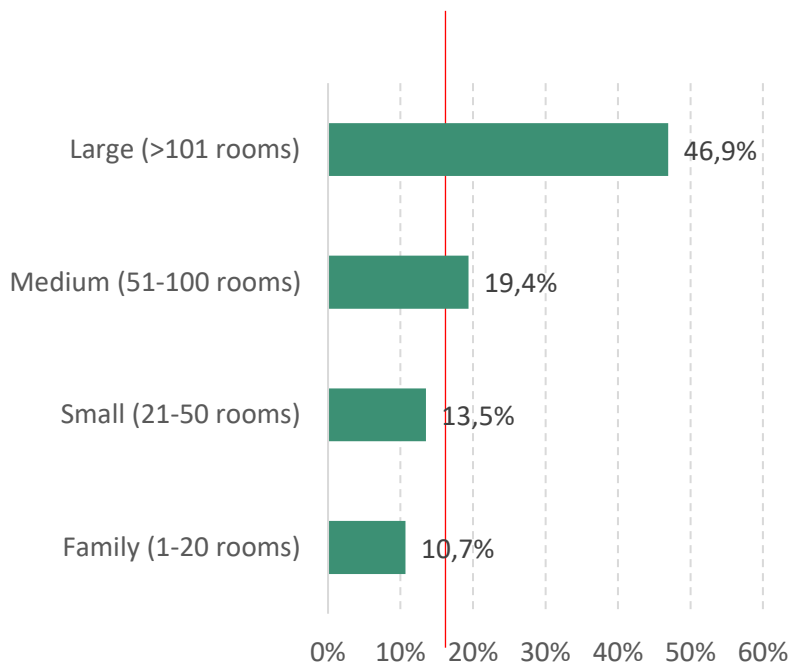
Food waste recycling (AVG. 20,2%)



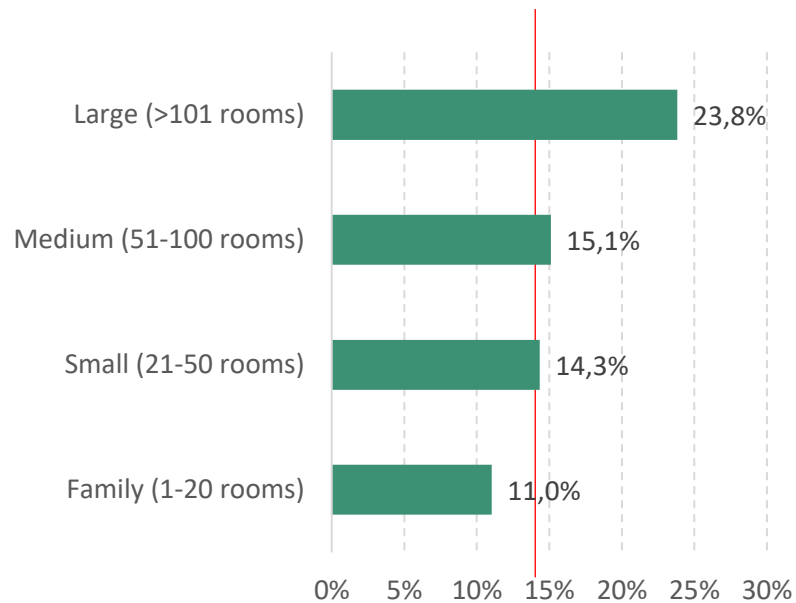


Hotel investments in sustainability practices*, based on size

Waste management (AVG. 15,9%)



Production of green energy from RES (AVG. 13,9%)



139

* Multiple choice questions.



Communication and promotion of sustainability actions implemented by hotels

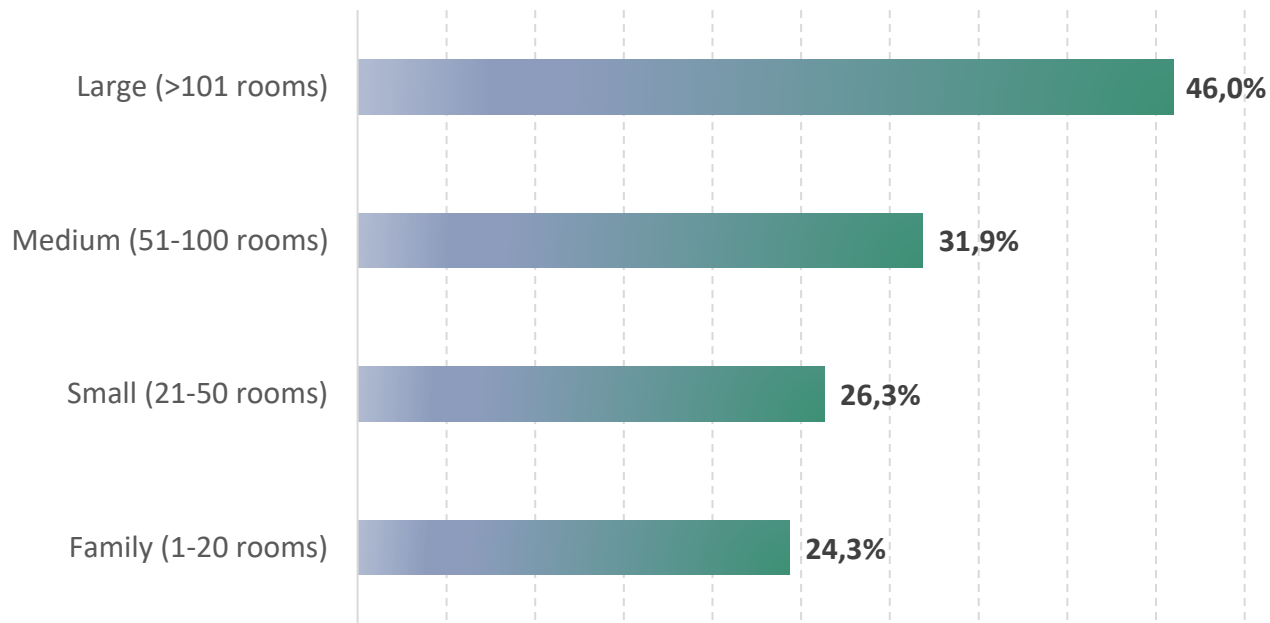
140

based on Size



Communication and promotion of sustainability actions implemented by hotels, based on size

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



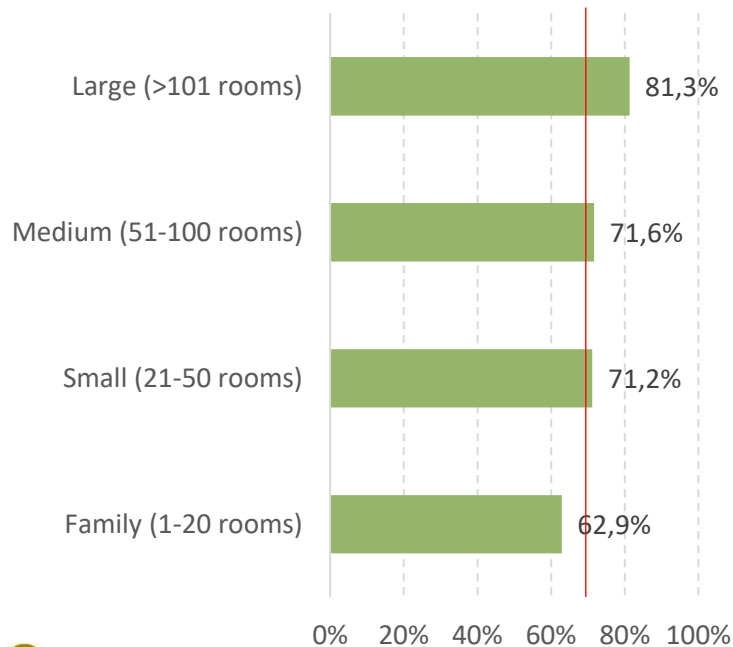
141



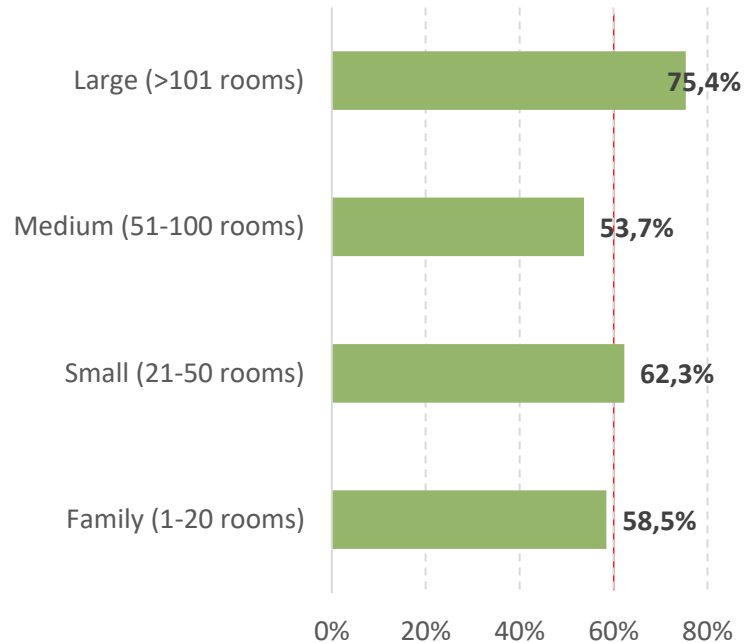
Communication and promotion channels of sustainability actions implemented by hotels*, based on size

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

Signage in the hotel area (AVG. 69,7%)



Hotel website (AVG. 61,5%)



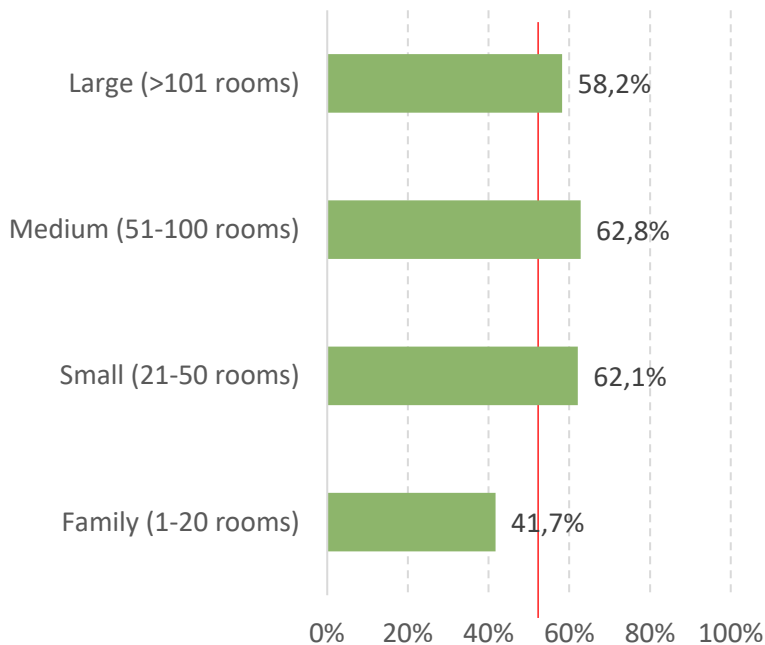
142



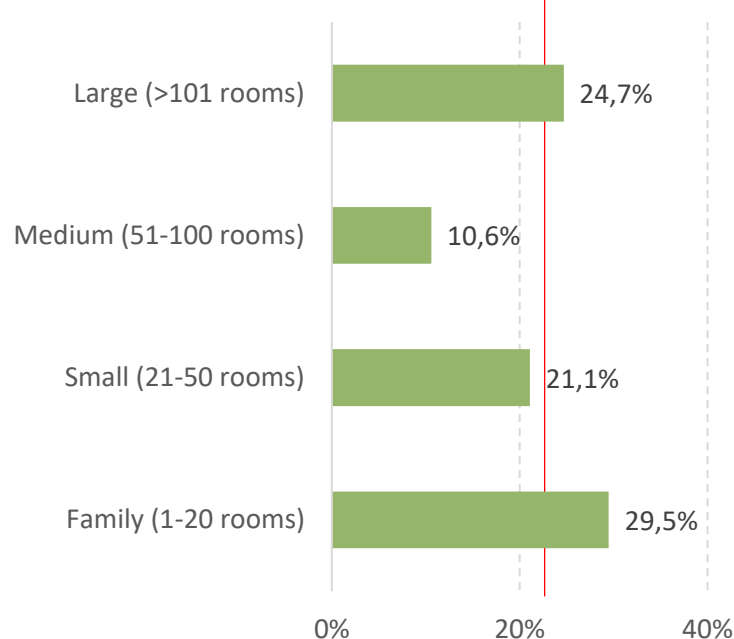
Communication and promotion channels of sustainability actions implemented by hotels*, based on size

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

Social Media (AVG. 54,3%)



Google corporate profile (AVG. 23,2%)

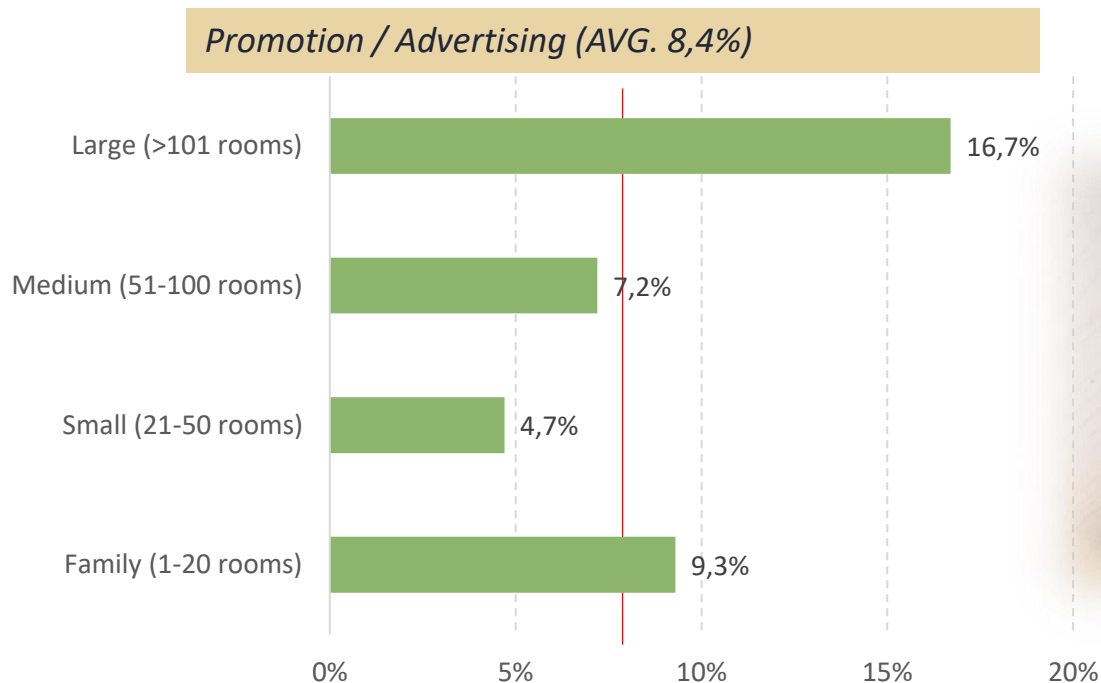


143



Communication and promotion channels of sustainability actions implemented by hotels*, based on size

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



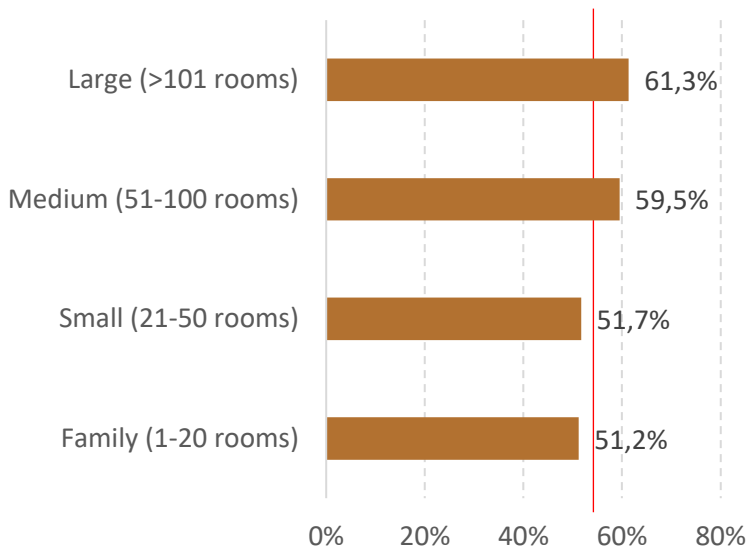
Measurable benefits from implementing sustainability actions

based on Size

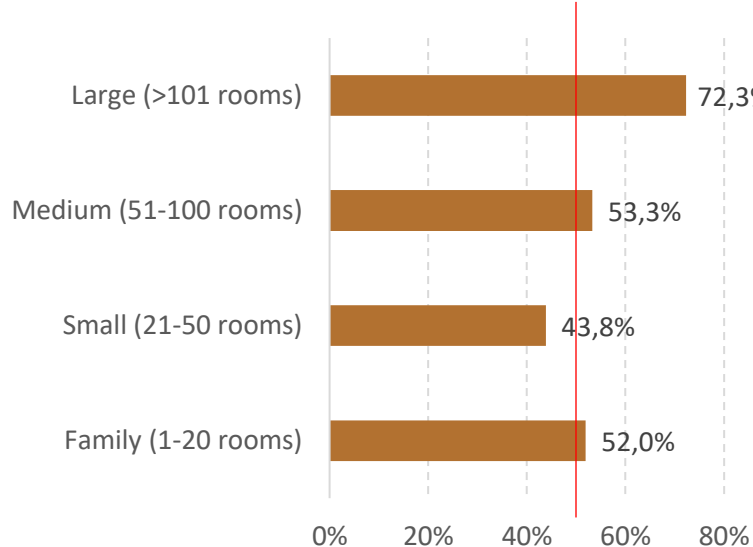


Measurable benefits from implementing sustainability actions*, based on size

Reduction of operational costs (AVG. 53,6%)



Maintain the balance of local ecosystem (AVG. 51,4%)

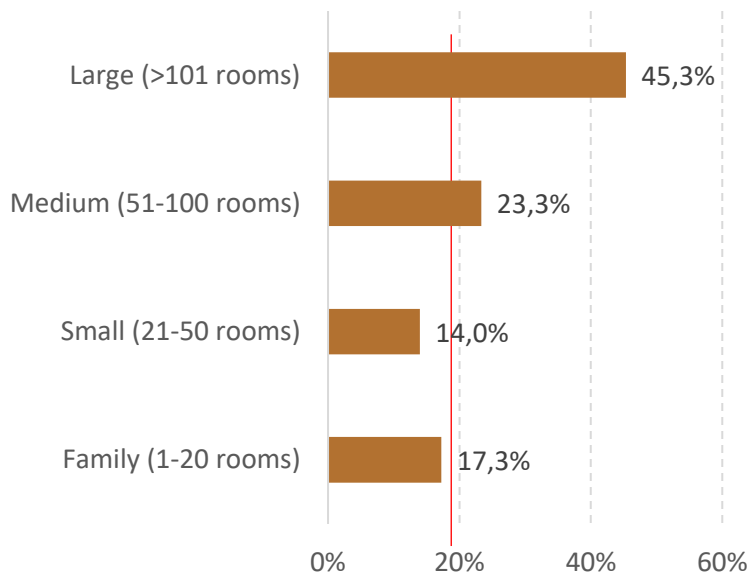


146

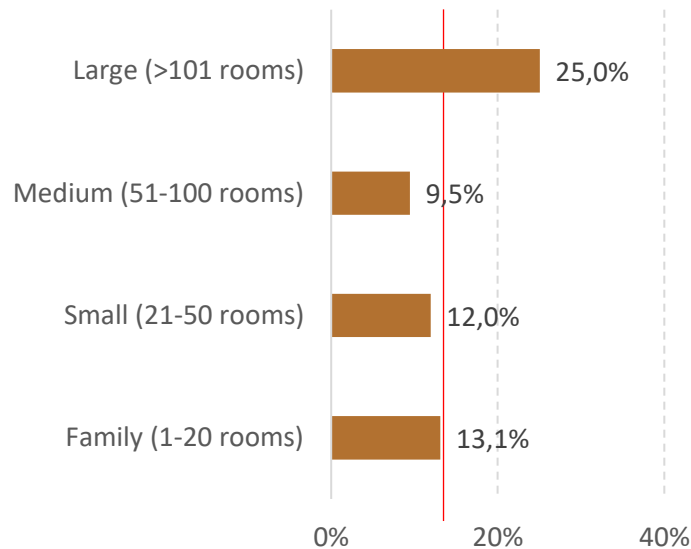


Measurable benefits from implementing sustainability actions*, based on size

Promotes the relationships with the local community (AVG. 19,9%)



Increase hotel turnover (AVG. 13,5%)



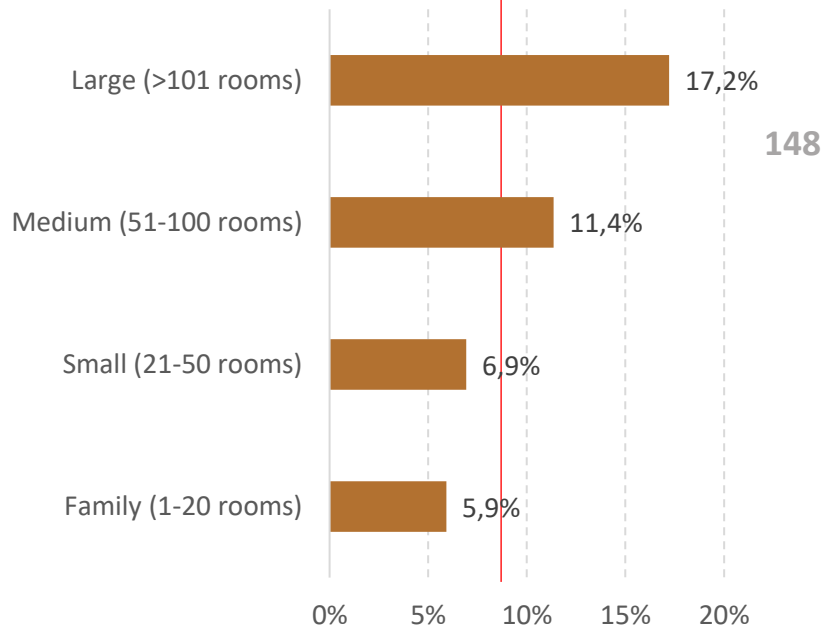
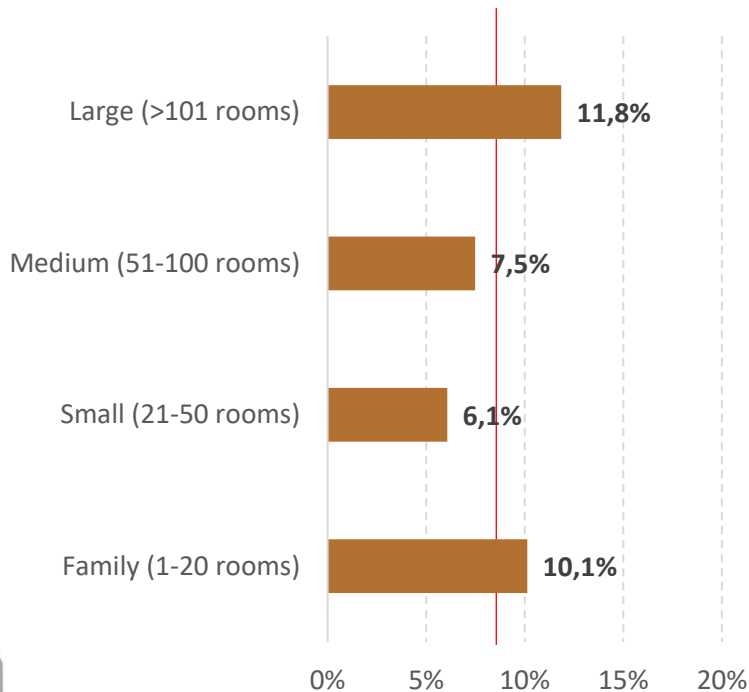
147



Measurable benefits from implementing sustainability actions*, based on size

Gives access to new client markets (AVG. 8,5%)

Makes me a more attractive employer (AVG. 8,3%)

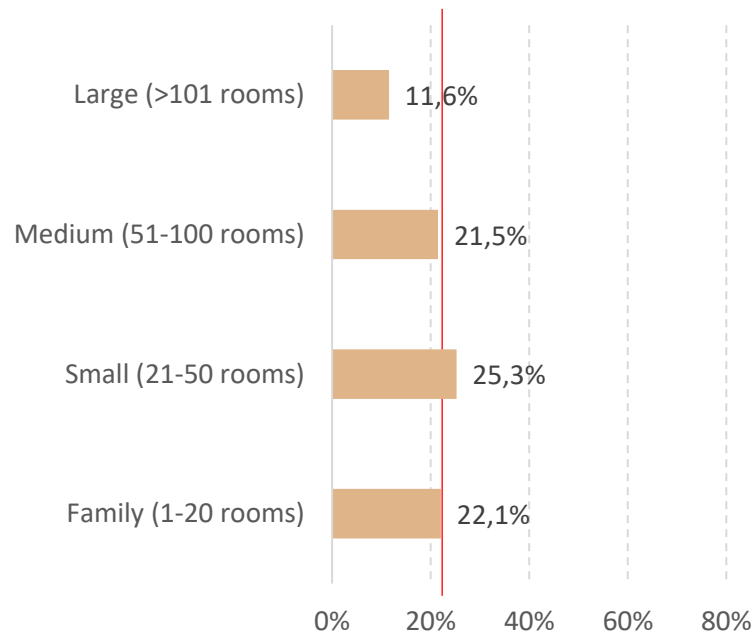
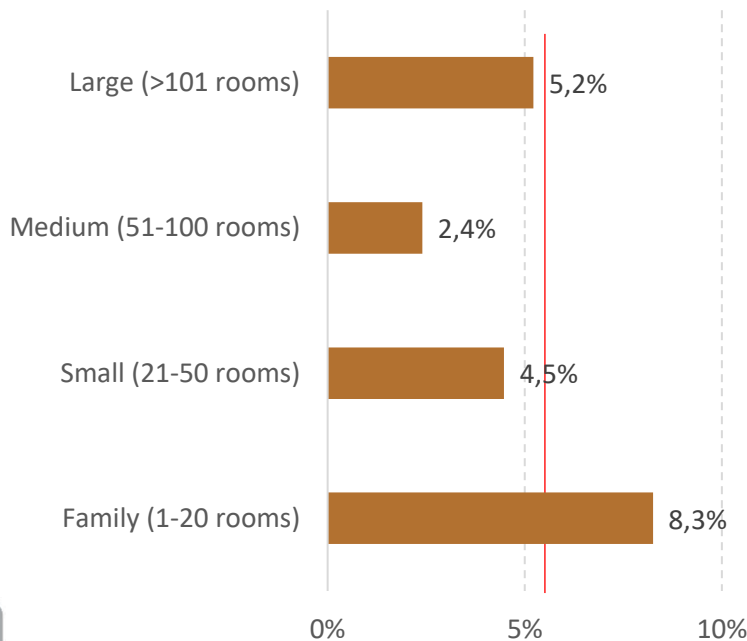




Measurable benefits from implementing sustainability actions*, based on size

Attracts customers who are willing to pay extra premium for it (AVG. 5,7%)

I haven't seen any measurable benefits (AVG. 22,0%)



149

* Multiple choice questions.

Possession of Certification regarding Environment–Energy–Sustainability

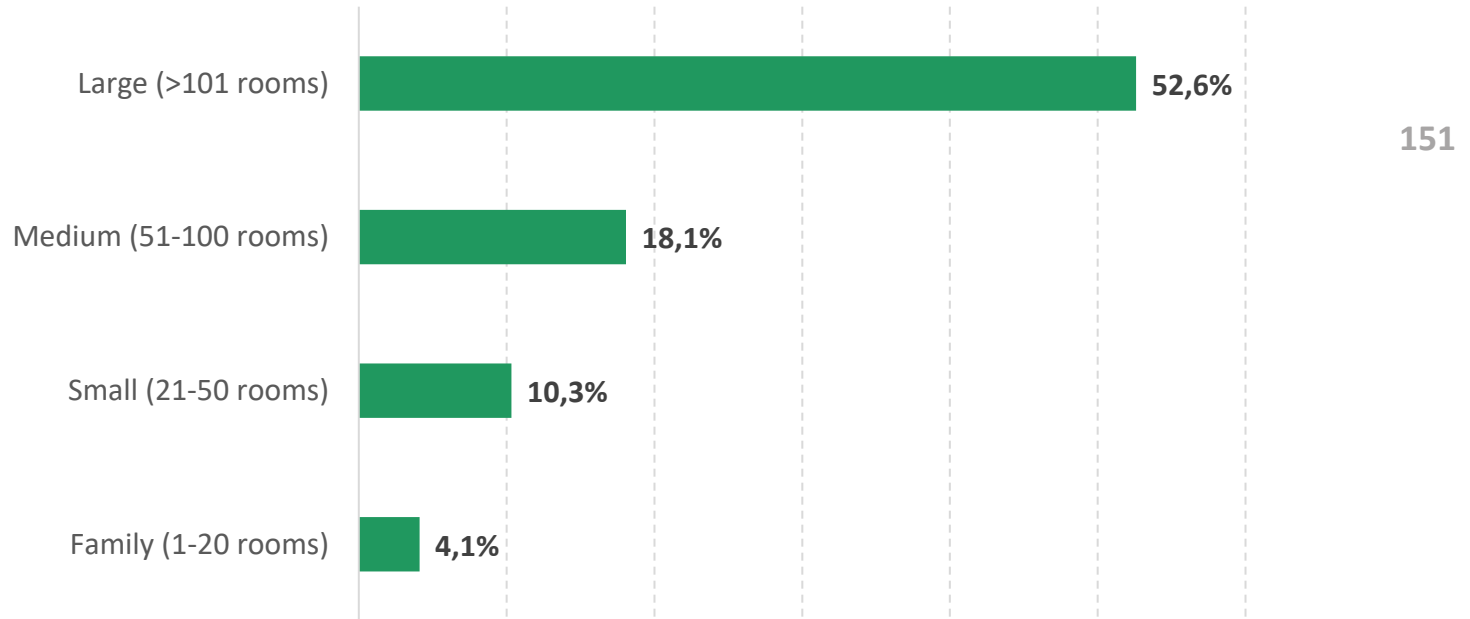
based on Size



Possession of Certification regarding Environment–Energy–Sustainability, based on size



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





Implementation of sustainable practices: Barriers and need for facilitation

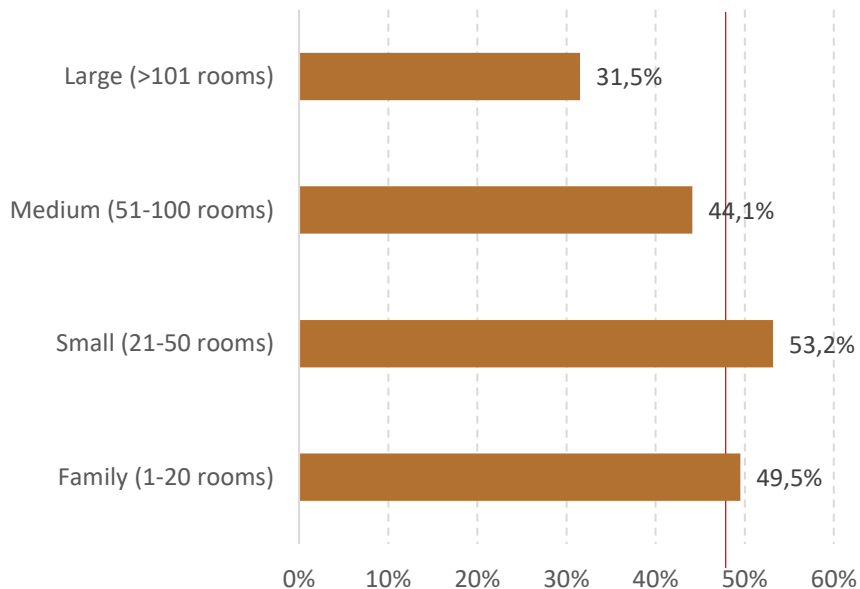
152

Based on Size

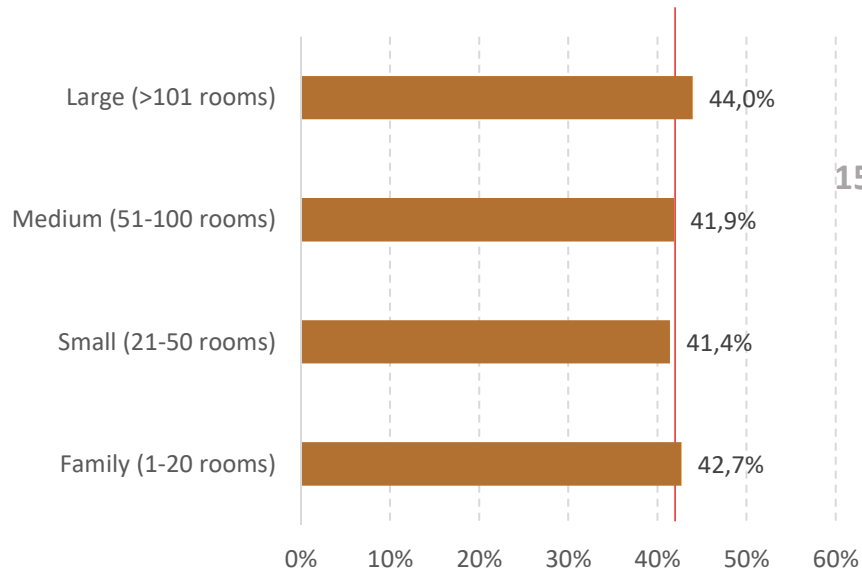


Barriers to implementing Sustainability Practices*, based on size

Cash-flow shortage (AVG. 48,7%)



Small team and we have to prioritize other issues (AVG. 42,2%)

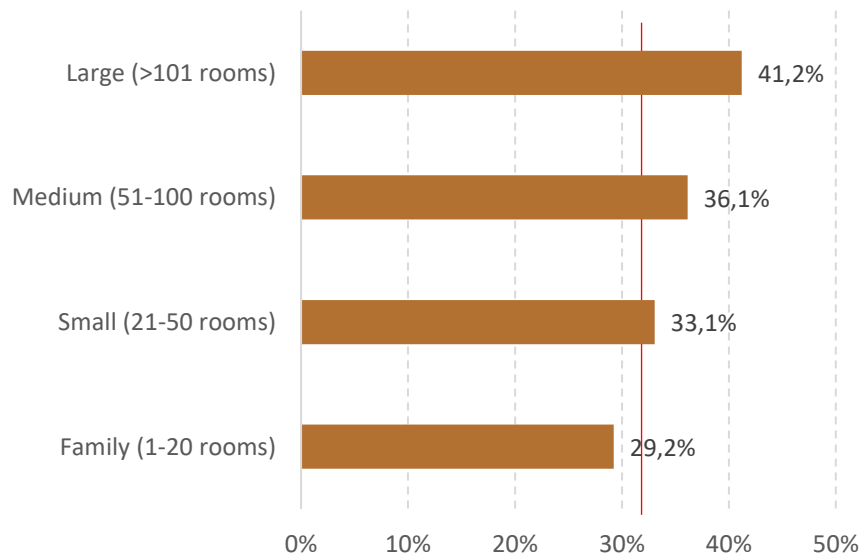


153

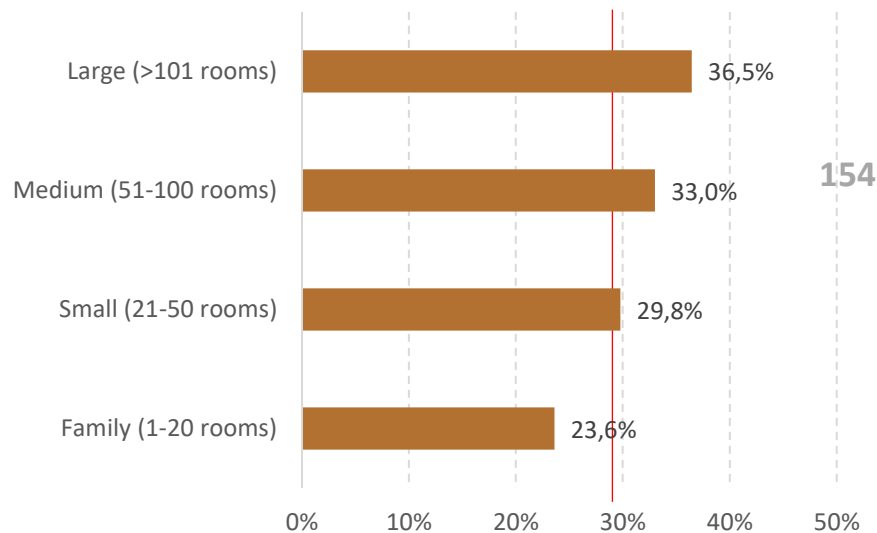


Barriers to implementing Sustainability Practices*, based on size

*Lack of information on financial schemes
(AVG. 32,6%)*



*Lack of information on sustainable practices
(AVG. 28,2%)*

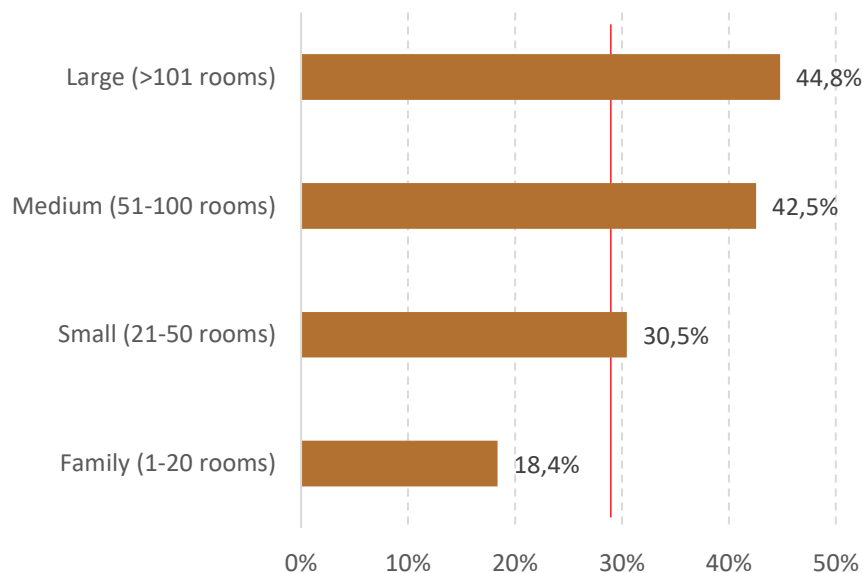


154

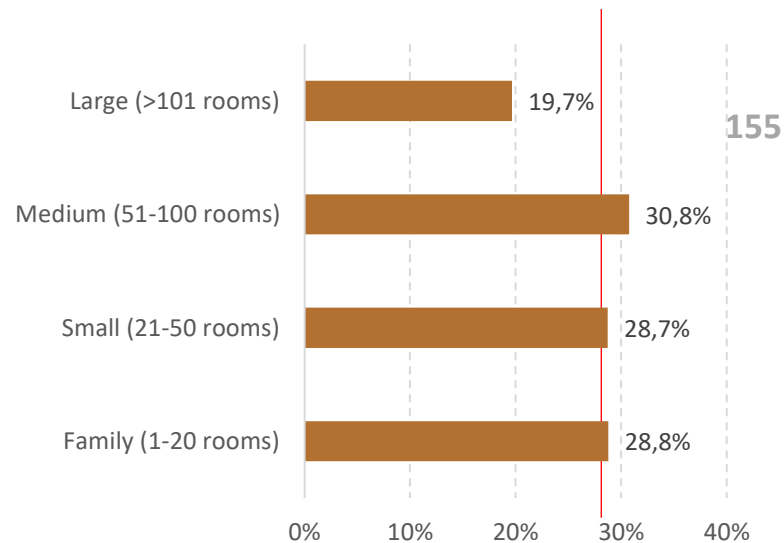


Barriers to implementing Sustainability Practices*, based on size

Lack of specialized staff (AVG. 28,2%)



There is no personal time available (AVG. 28,2%)

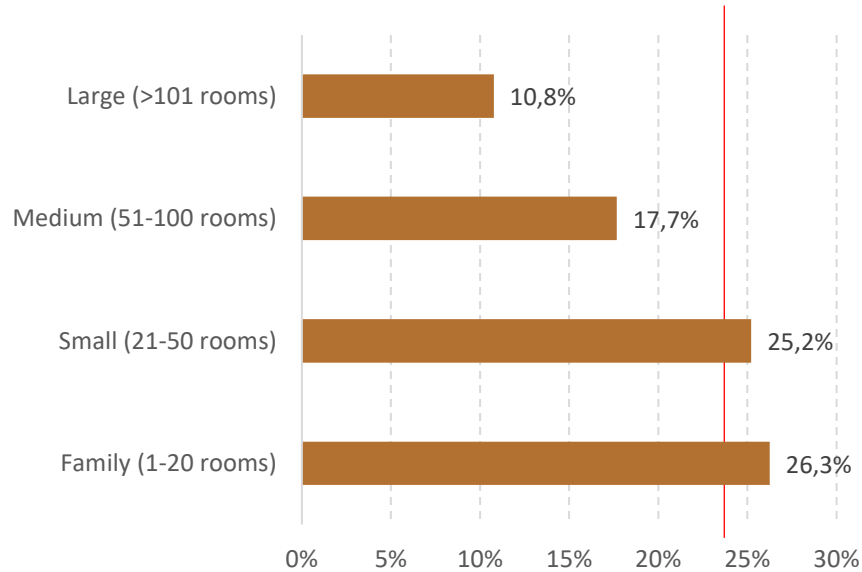


155

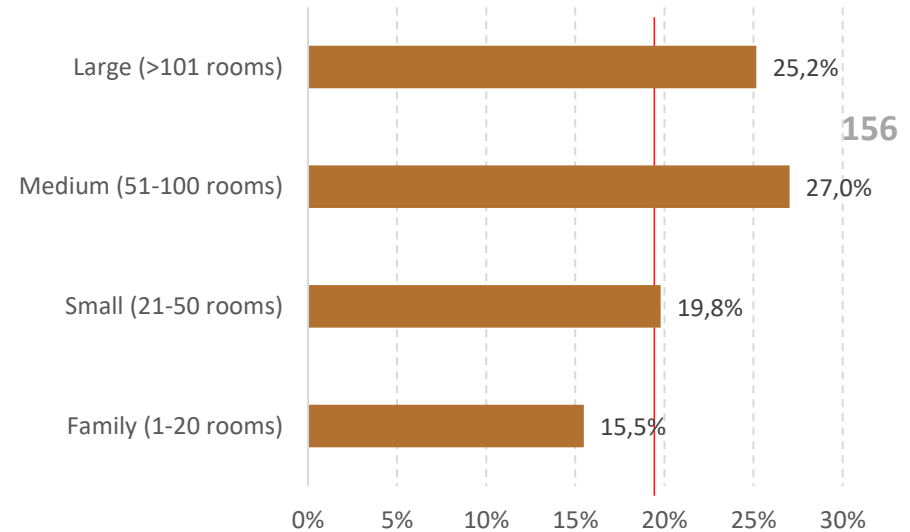


Barriers to implementing Sustainability Practices*, based on hotel's size

*Inability to participate in financial schemes
(AVG. 23,5%)*



*Lack of know-how/experience to prepare the
file & submit the proposal (AVG. 19,4%)*

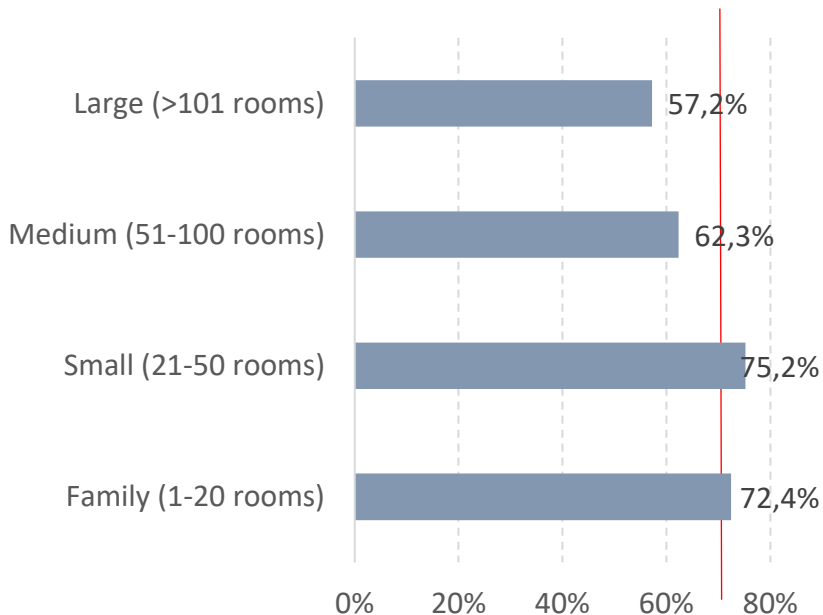


* Multiple choice questions.

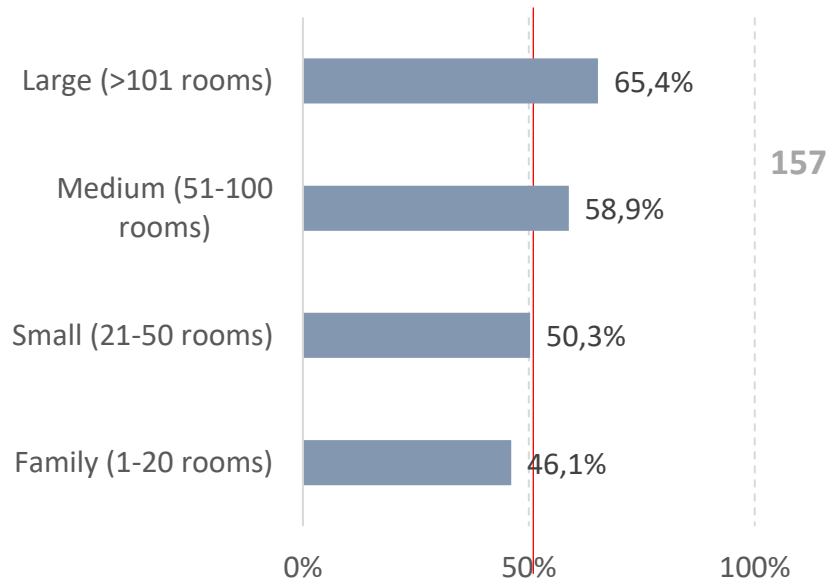


Facilitations for implementation or expansion of Sustainability Practices in the hotel*, based on size

Funding (AVG. 71,0%)



Education / training for me and my staff (AVG. 50,9%)

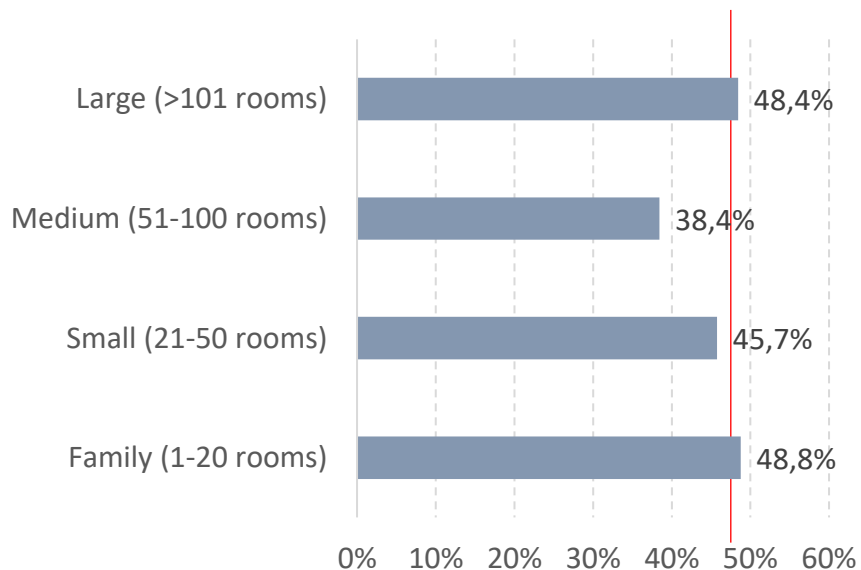


157

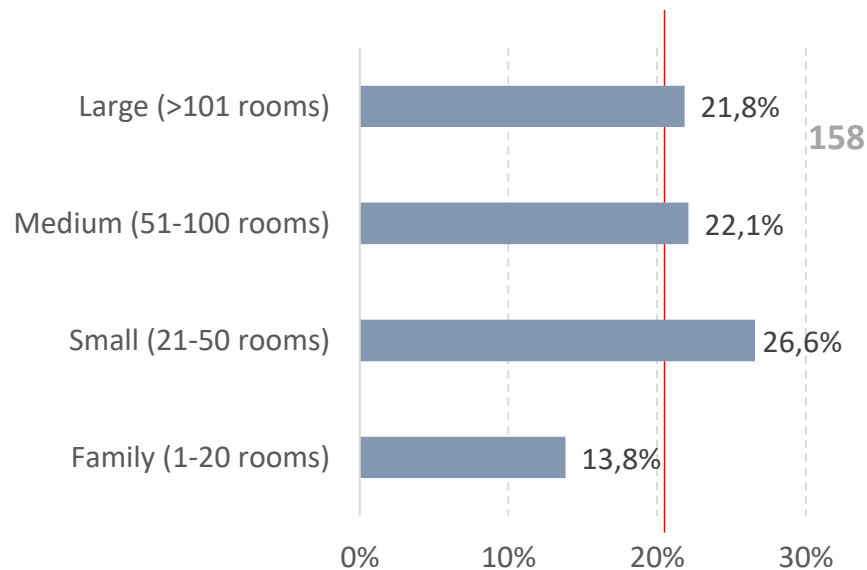


Facilitations for implementation or expansion of Sustainability Practices in the hotel*, based on size

Information on sustainability practices tailored to the needs of my business (AVG. 46,3%)



Cooperation with external consultants on sustainability issues (AVG. 20,4%)



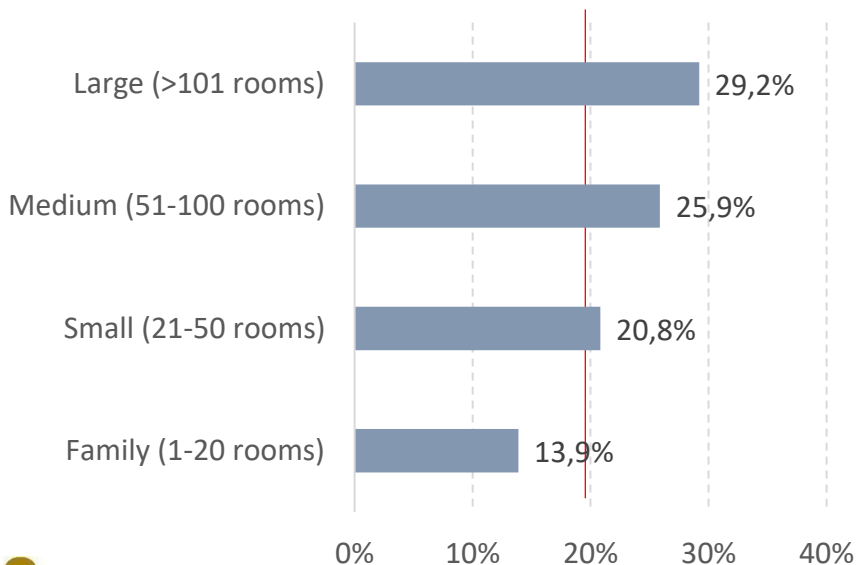
158

* Multiple choice questions.

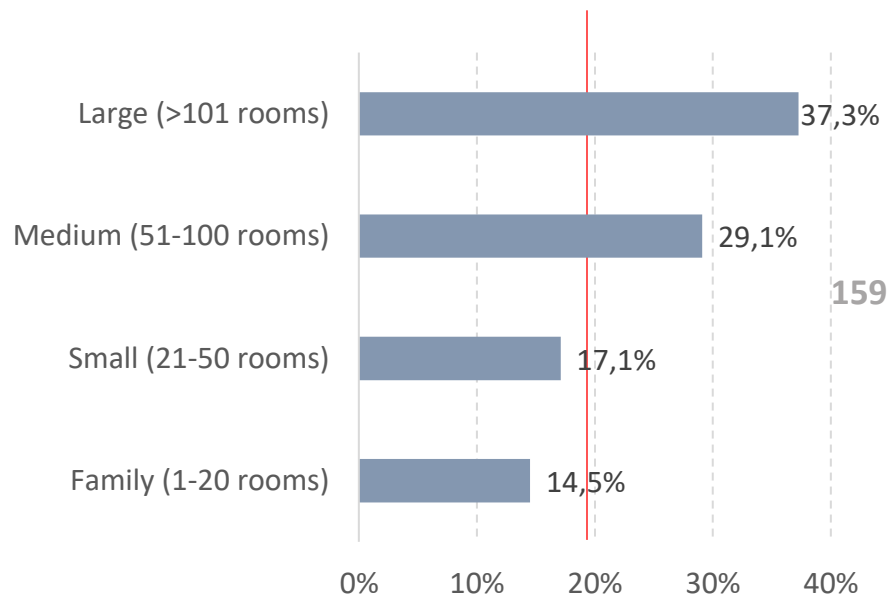


Facilitations for implementation or expansion of Sustainability Practices in the hotel*, based on size

Acquiring financial resources to hire trained/specialized staff (AVG. 19,3%)



Finding trained/specialized staff (AVG. 19,2%)



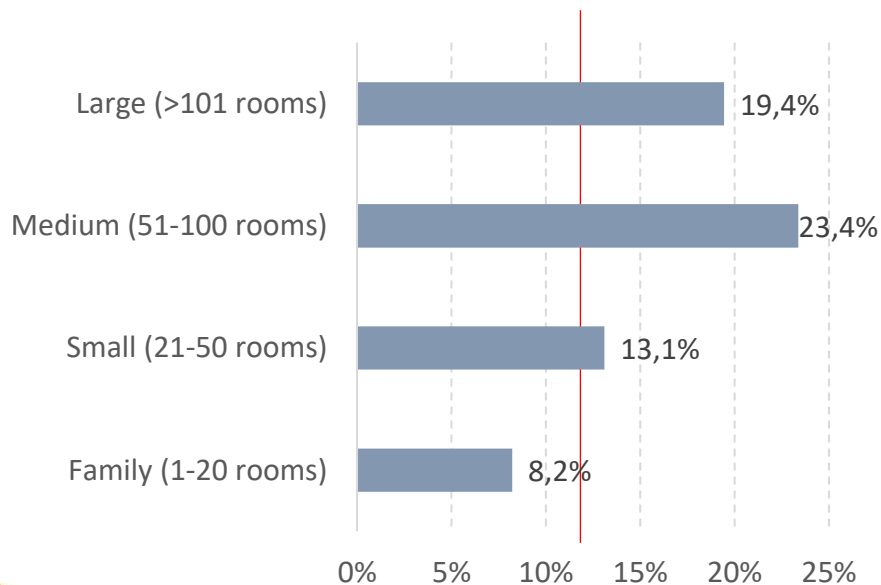
159

* Multiple choice questions.

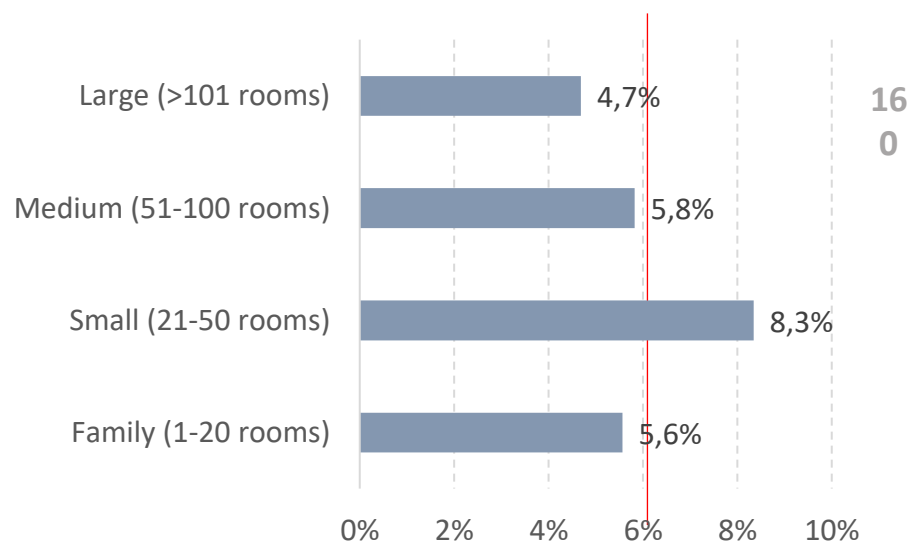


Facilitations for implementation or expansion of Sustainability Practices in the hotel*, based on size

Appoint a person who will deal with the sustainability issues of my business
(AVG. 12,9%)



Support from DMO (AVG. 6,6%)



16
0



**Assessment of knowledge on
sustainability issues**

161



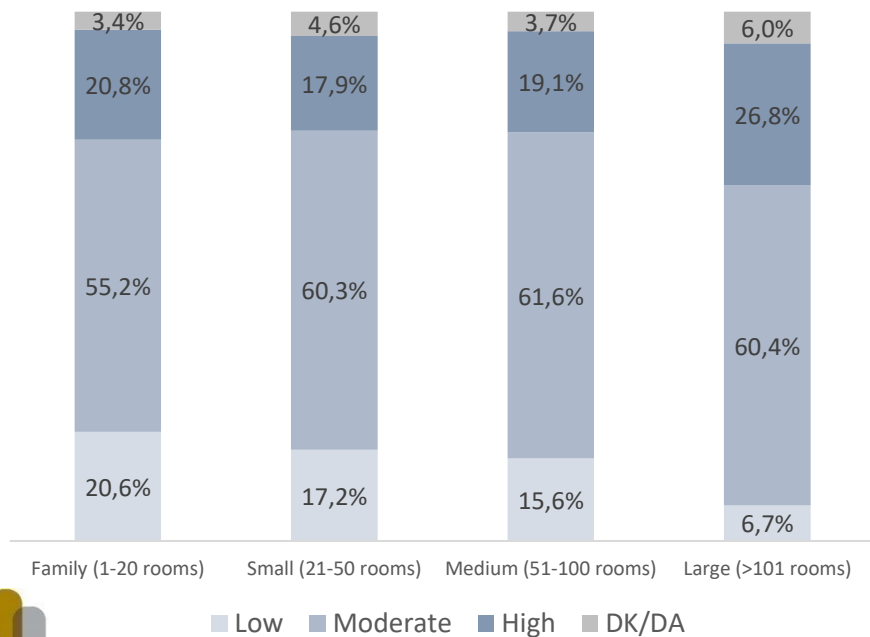
**Knowledge of the educational program
“Grow Greece with Google”**

based on Size

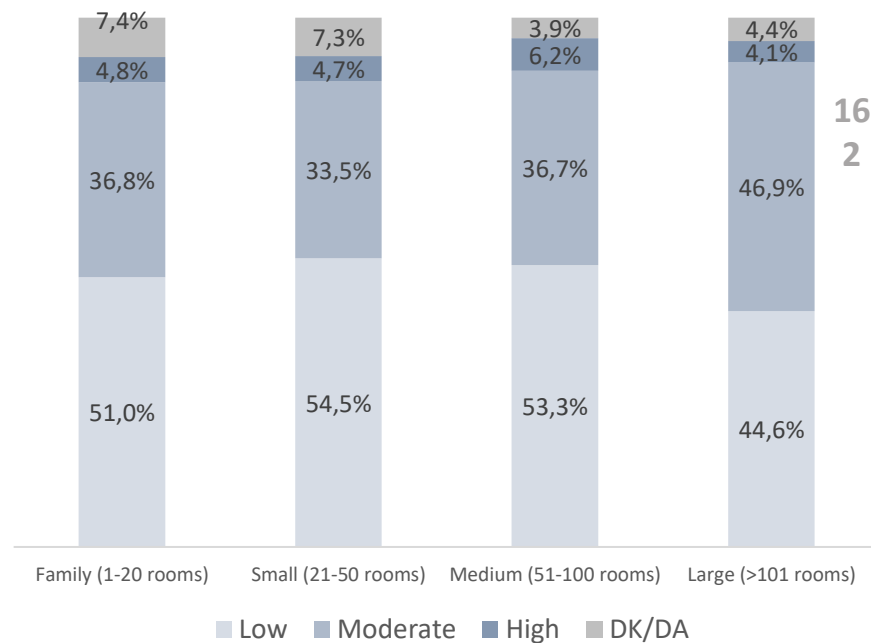


Assessment of knowledge on sustainability issues, based on hotel's size

Self-assessment of hoteliers **GENERALLY** on environmental sustainability issues.



Evaluation of the level of knowledge of the Staff regarding the implementation of sustainability good practices in the hotel



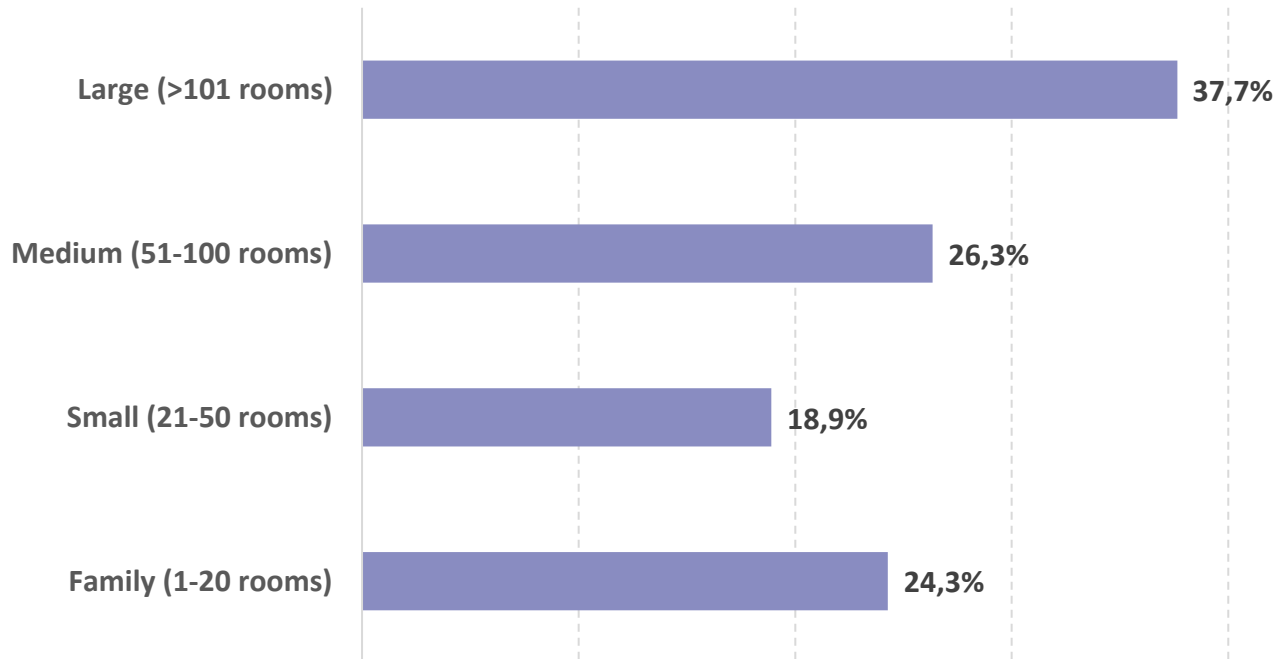
16
2



"Grow Greece with Google", based on size



Grow with Google



16
3