

Sustainable Hospitality: Key Indicators and Challenges in the Greek Hotel Sector

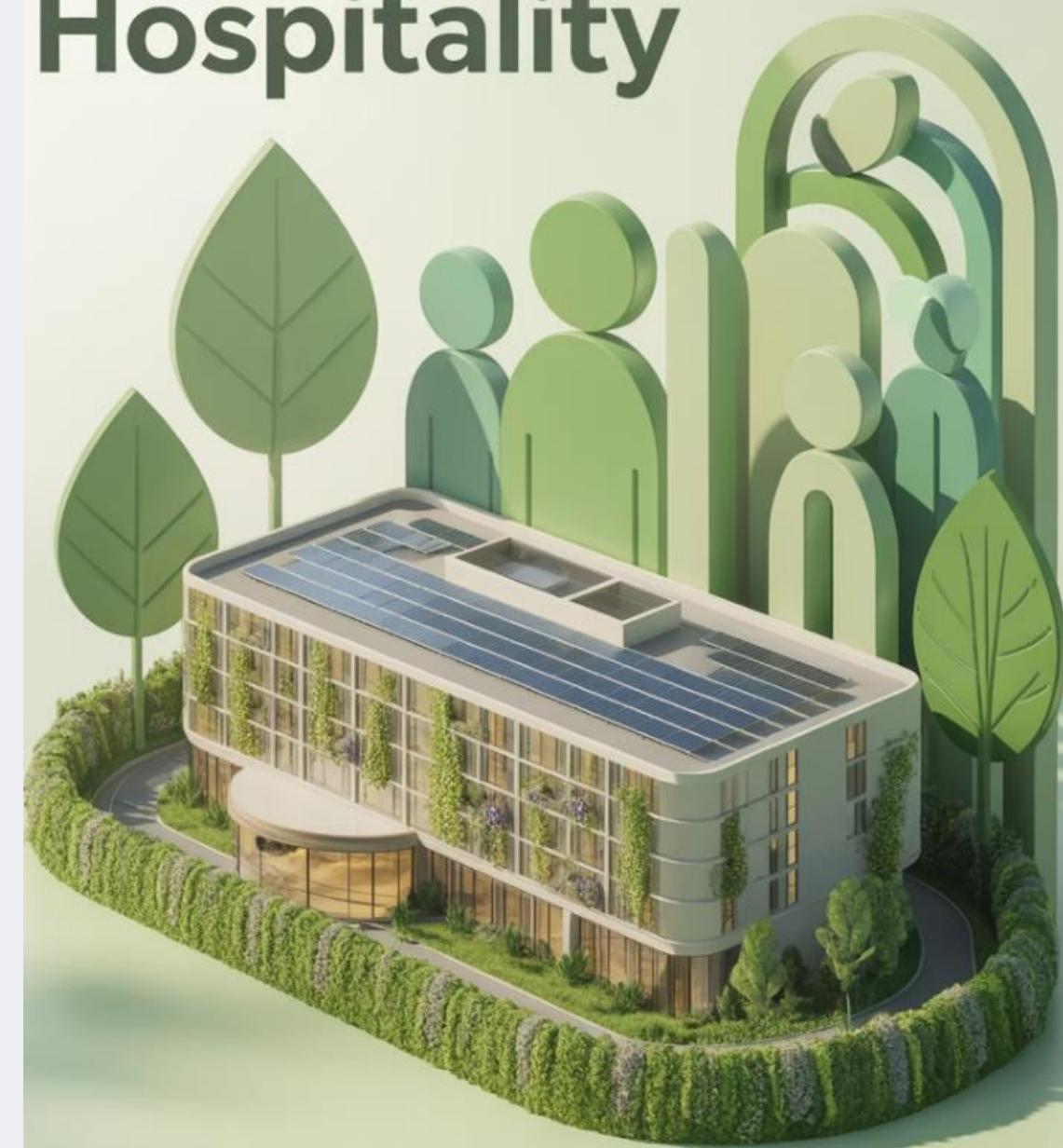
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Sustainable Hospitality

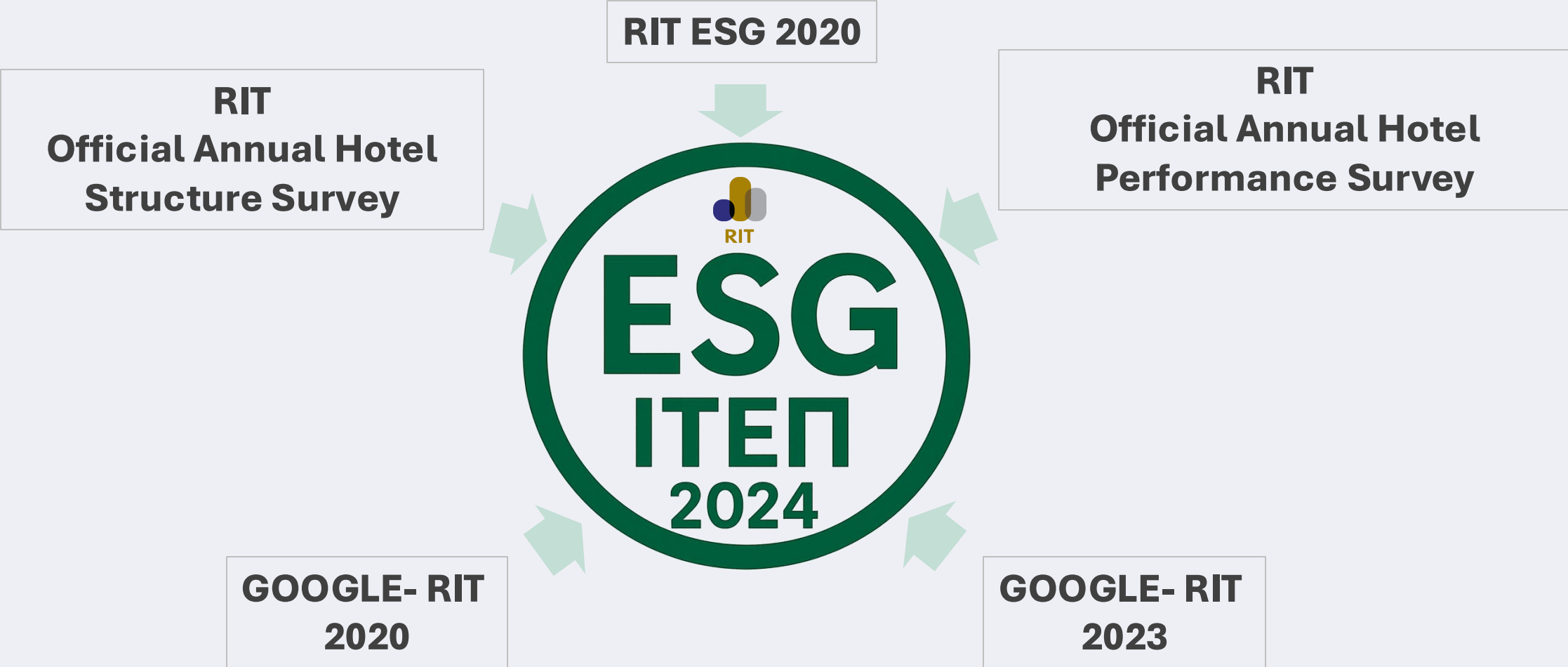


ESG Sustainability
hospitality
hprel

Survey Identity

SURVEY TITLE	ESG SUSTAINABILITY IN THE GREEK HOTEL SECTOR
ASSIGNING AUTHORITY	Hellenic Chamber of Hotels (HCH)
CONDUCTING BODY	Research Institute for Tourism (RIT)
REFERENCE PERIOD	2024
SURVEY TIME PERIOD	7 – 31 August 2024
DELIVERABLE DATE	September 2024
POPULATION	Greek Hotels
STATISTICAL UNIT	Hotel Unit
REGISTRY	HCH Registry
CLASSIFICATIONS	NUTS II (Regions) , Category, Size of Hotels
SAMPLING METHOD	Stratified proportional sampling
WEIGHTING	Triple (Region, Class, Size (Rooms))
SAMPLE/POPULATION SIZE	n=896 / N=10.000
COLLECTION METHOD	CAWI

ESG Sustainability Survey 2024: Integrated Data Utilization



►►► Distribution of Hotel Units & Rooms by Category

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Category	% of Hotel Units	% of Rooms
5*	8,3	24,5
4*	18,8	29,2
3*	29,4	22,6
2*	32,2	18,8
1*	11,4	4,9

Hotels rated 4* and 5* represent **27%** of the total hotel establishments, accounting accounting for **54%** of all available rooms.

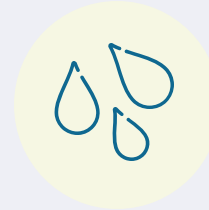


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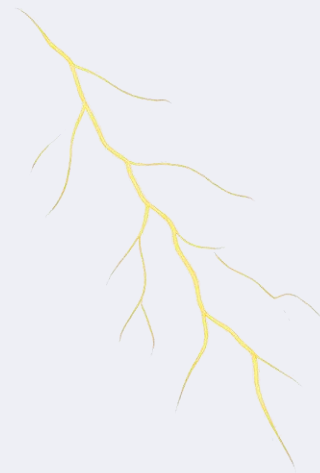
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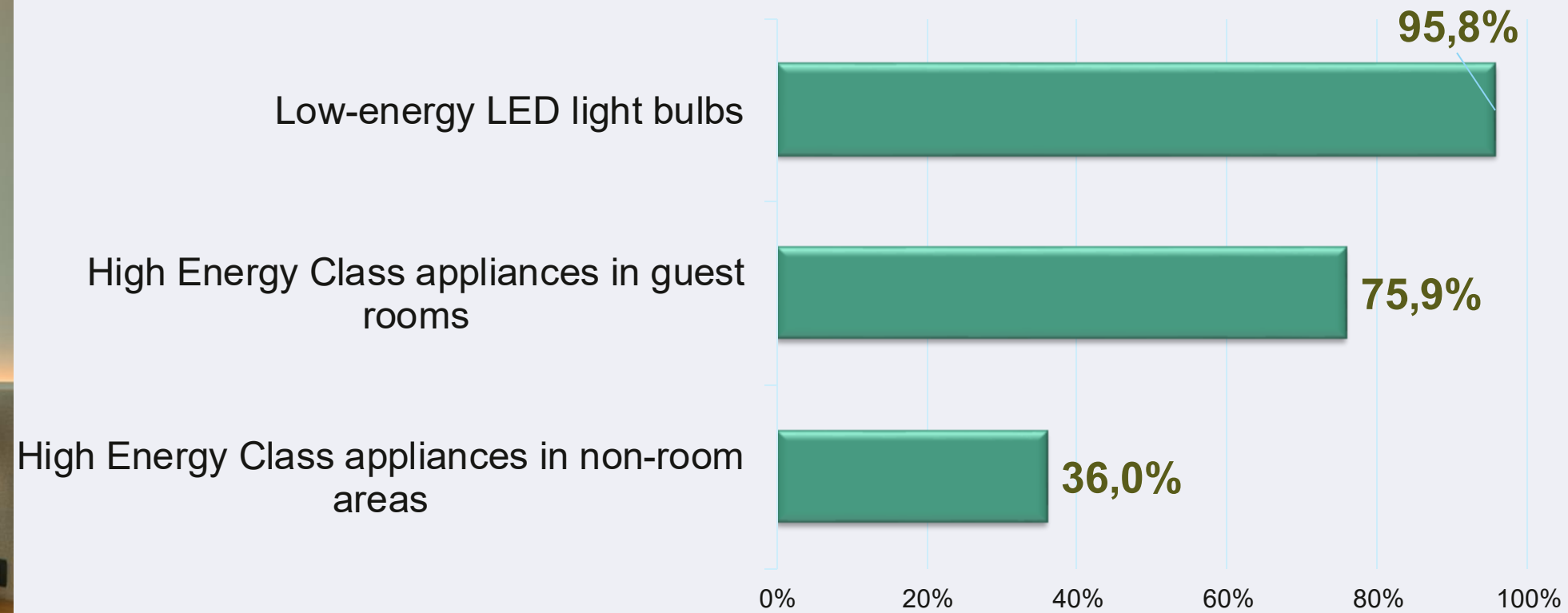


ESG.1

ENERGY

Energy-Saving Devices in Greek Hotels

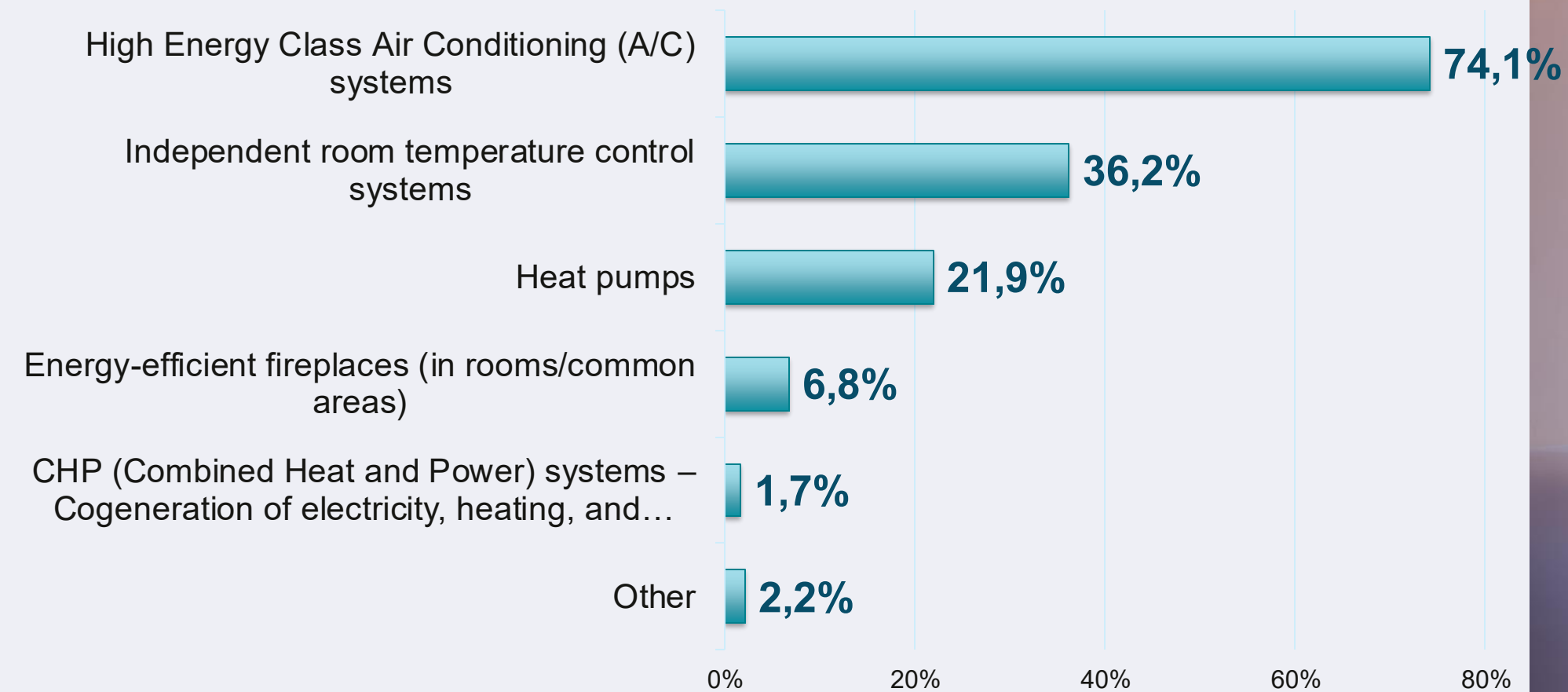
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* Multiple Answers.

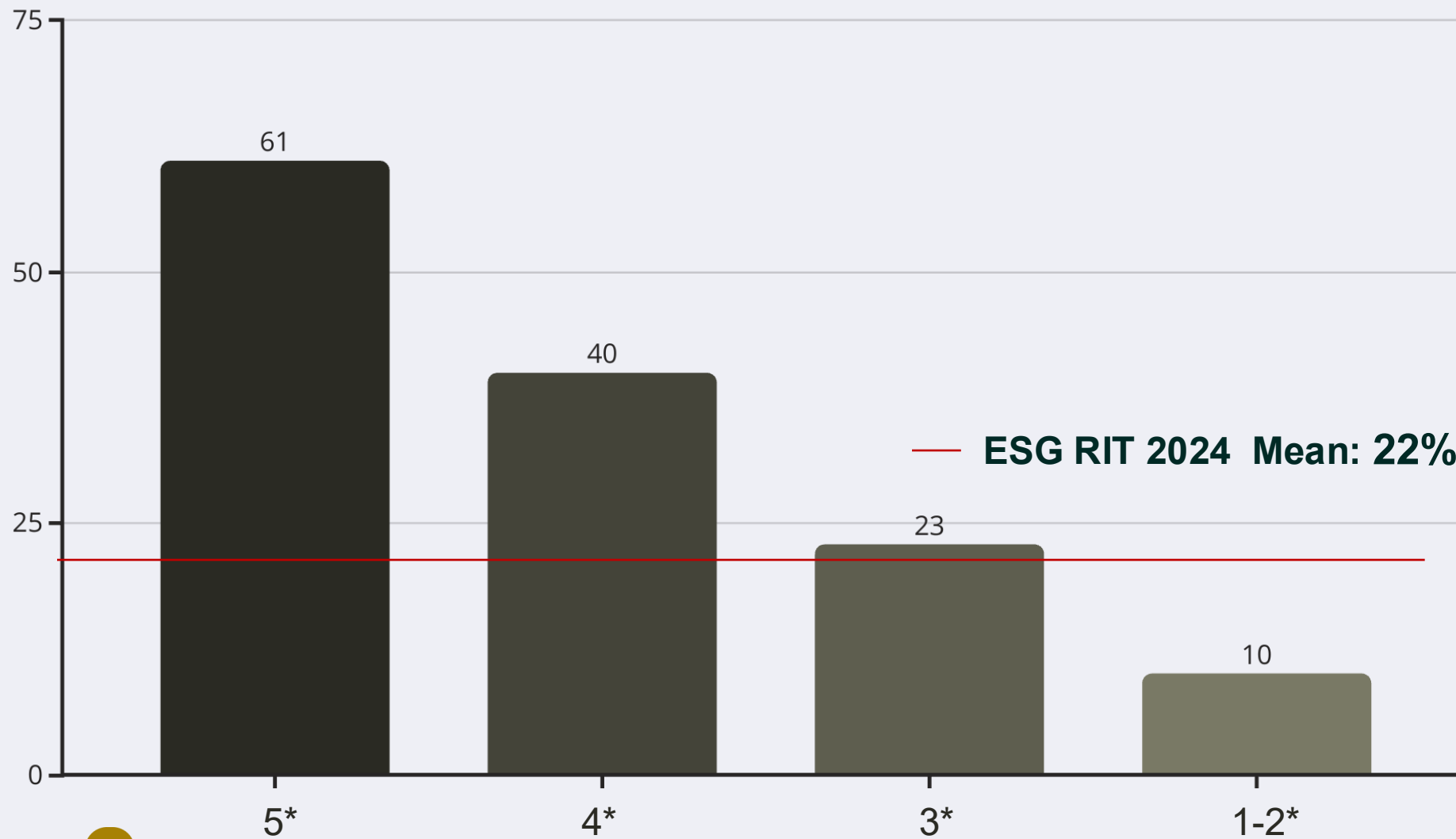
Heating & Cooling Methods in Greek Hotels

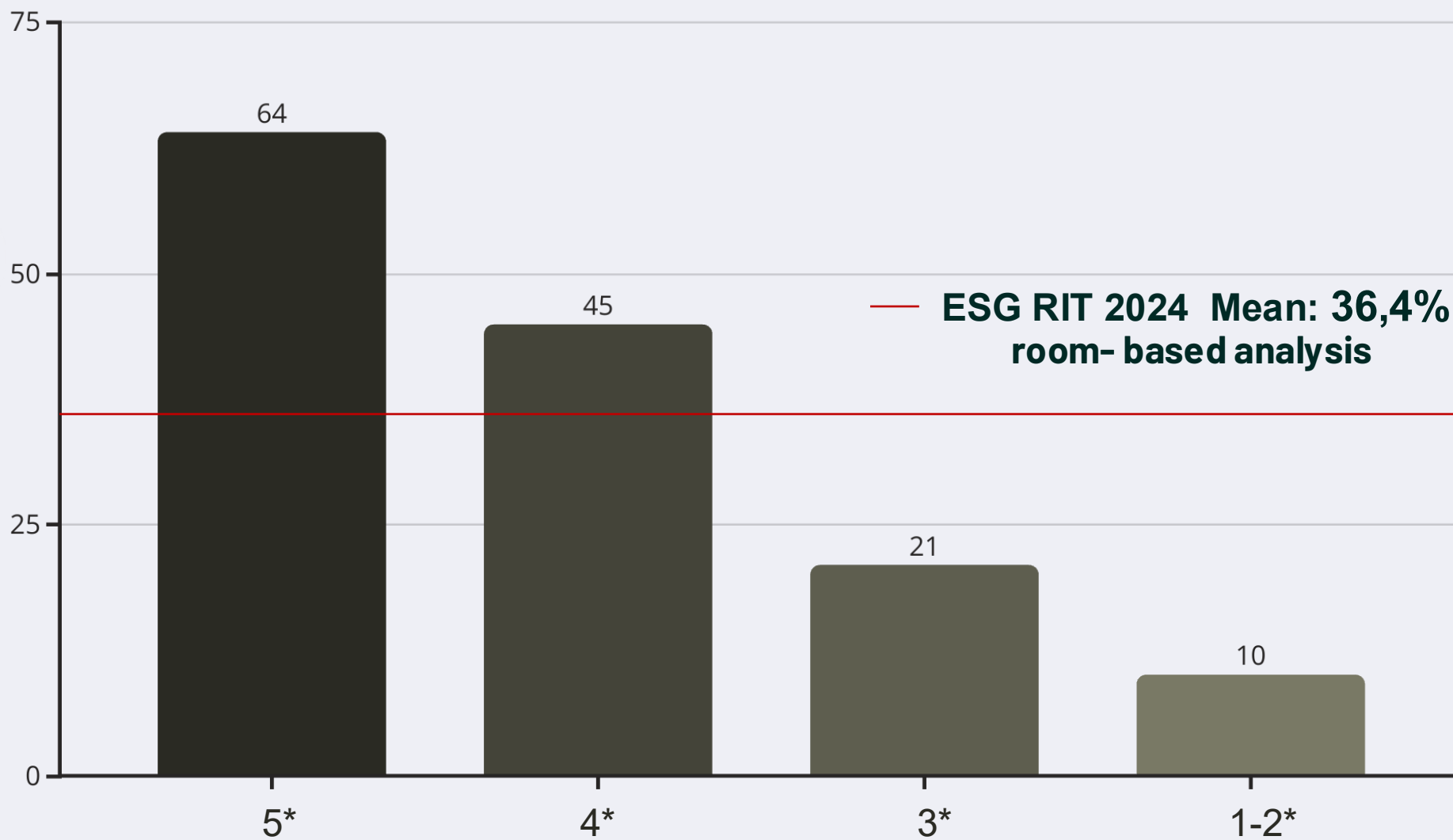
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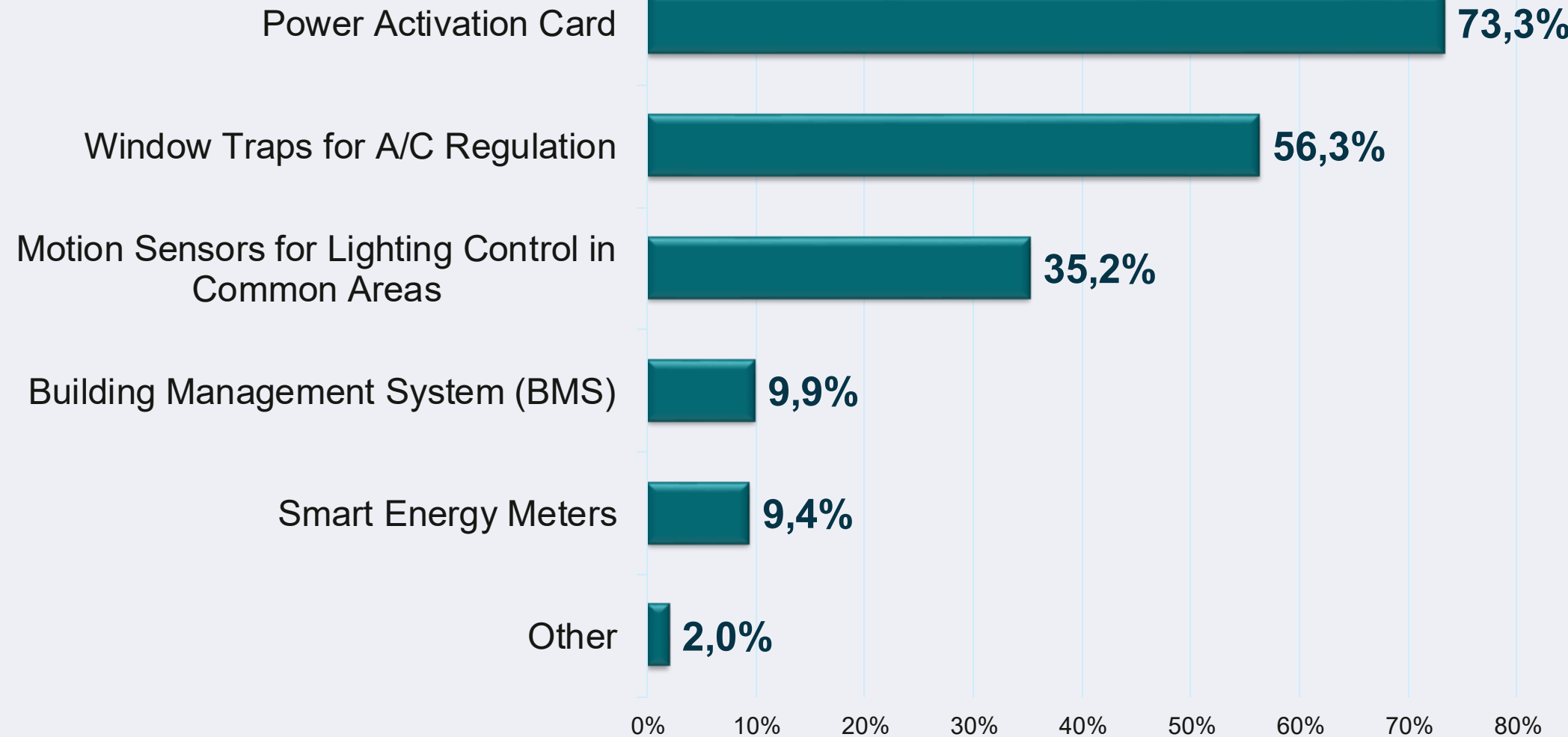


* Multiple Answers.










* Multiple Answers.

Increase in the share of hotels using
a **Building Management System (BMS)**:

6,3% 2020  9,9% 2024





50,2%
Energy-Efficient
Windows



54,4%
Energy-Efficient Frames



42,7%
Wall and Roof
Insulation



48,7%
Awnings / Shading
Systems



15,7%
EV Charging Stations



13,6%
Use of
Electric Vehicles

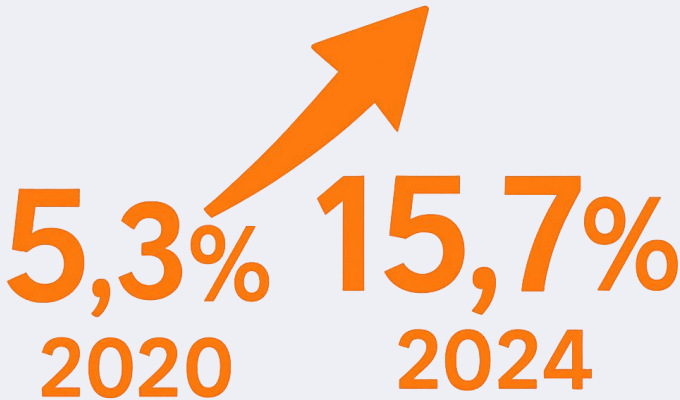


Electric Vehicle Charging Stations in Greek Hotels



Increase in the percentage of hotels offering electric vehicle charging stations:

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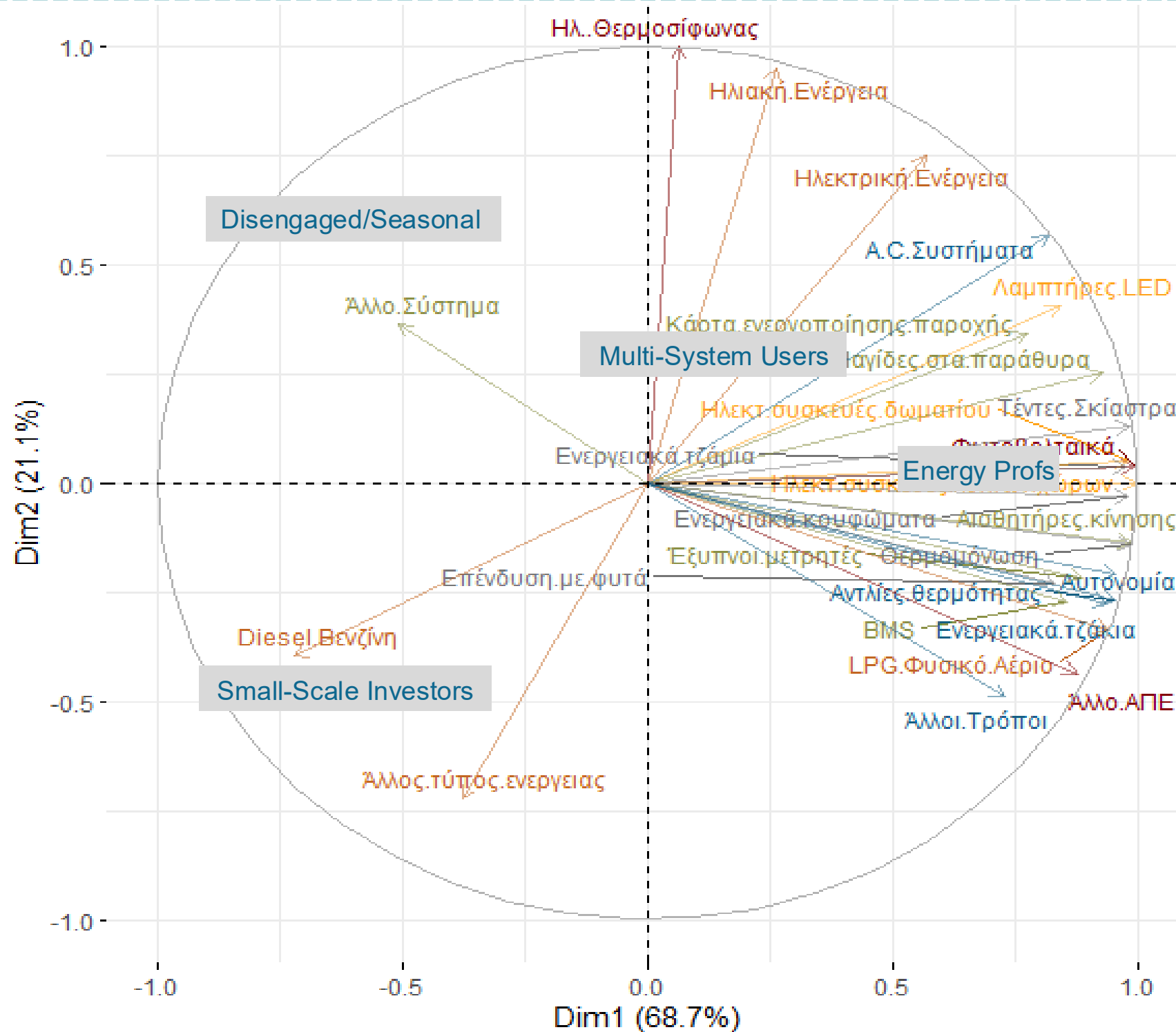


Category	RIT- HCH 2020	RIT- HCH 2024
5*	21,3%	65,3%
4*	11,5%	28,5%
3*	2,8%	13,2%
2*	1,7%	5,1%
1*	n/a	n/a

The installation of electric vehicle charging stations, beyond being a sustainable practice, offers a competitive advantage for hotels by attracting environmentally conscious guests.

Multifactor Analysis of the Energy Profiles of Greek Hotels

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Energy Profs (8%)

They use specialized energy management tools and practices.
Mostly 4* and 5* hotels.



Multi-System Users (32%)

Focus on solar energy and control systems (e.g., key card activation, window sensors for A/C). Primarily 3* and 4* hotels.



Disengaged/Seasonal (37%)

The majority of hotels, with 90% being small or family-run 1* and 2* properties.
Only solar water heaters are typically used.



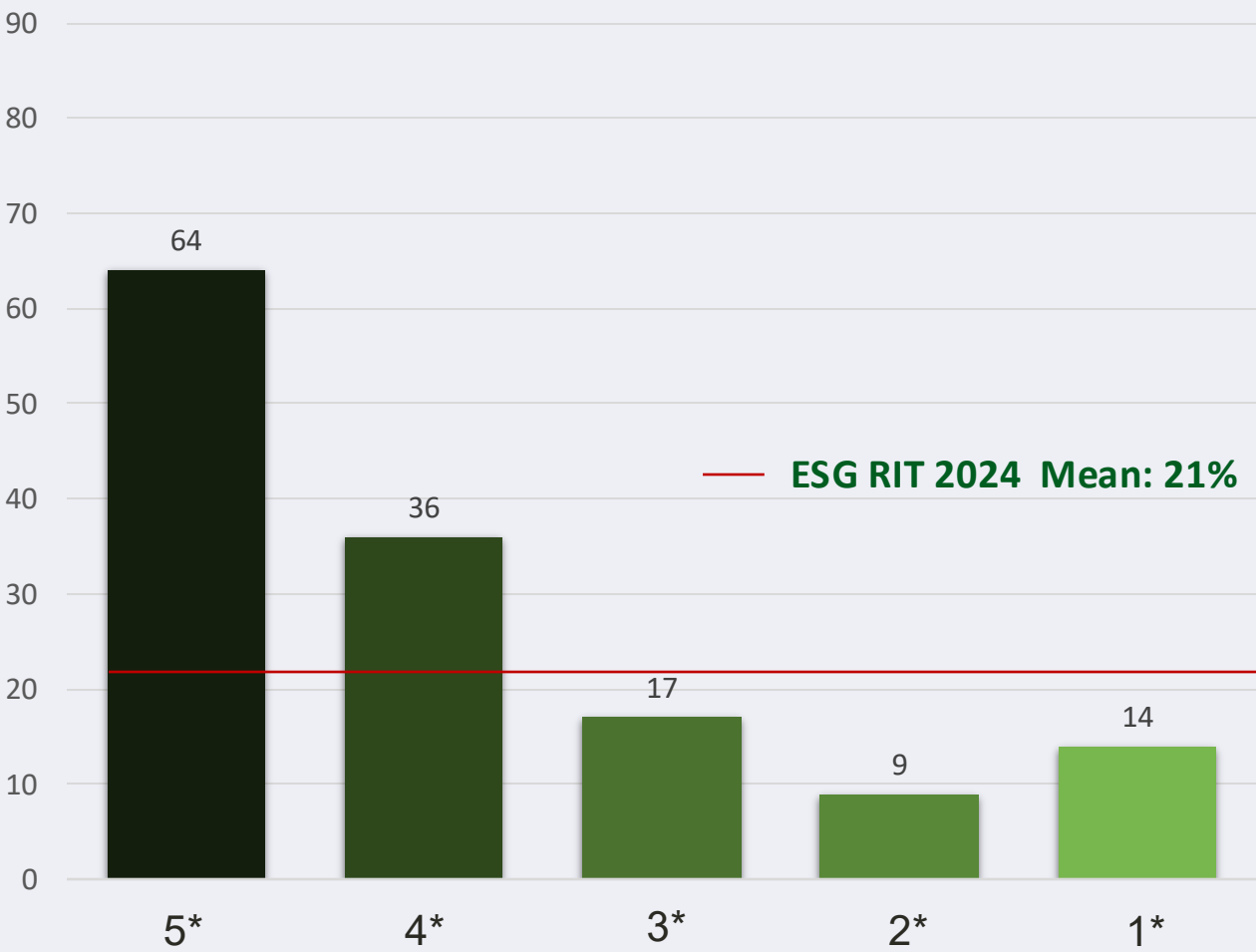
Small-Scale Investors (23%)

Rely on conventional fuels (diesel, petrol, wood stoves) with minor upgrades. More commonly found at higher altitudes.

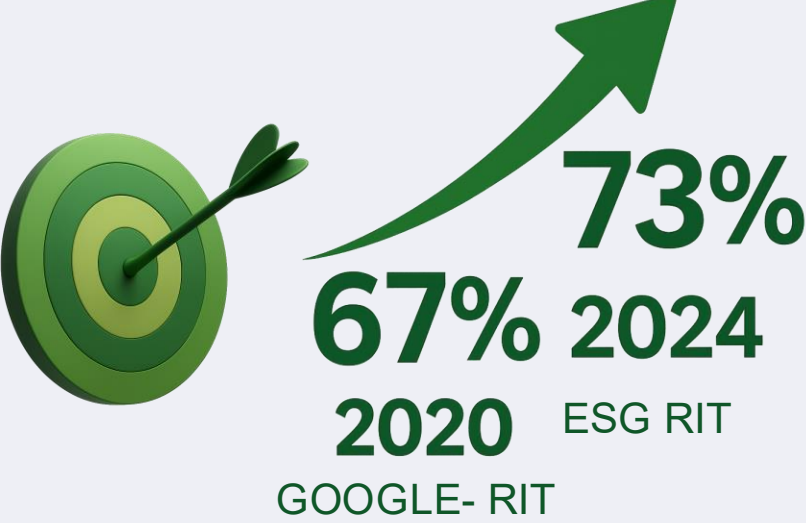


Energy Monitoring & Reporting Systems and Consumption Reduction Targets

21% of hotels have a system for recording and monitoring their energy consumption



Increase in the percentage of hotels that have set energy consumption reduction targets: **17**



Category	GOOGLE-RIT 2020	RIT- HCH 2024
5*	89%	87%
4*	68%	77%
3*	66%	69%
2*	65%	71%
1*	60%	68%

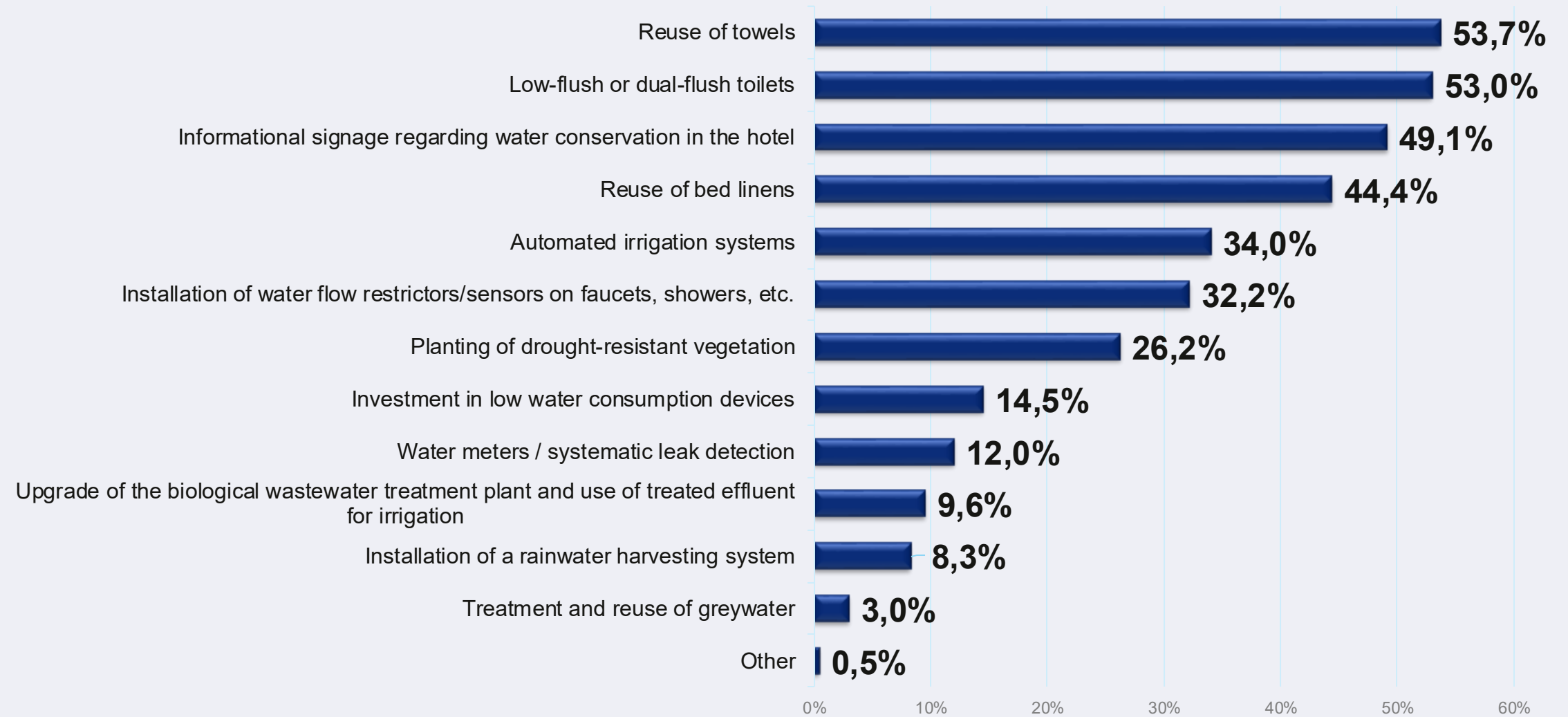


ESG.2

WATER

Water-Saving Actions in Greek Hotels

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* Multiple Answers.



45,6%

Have a swimming pool

Among those with a pool:



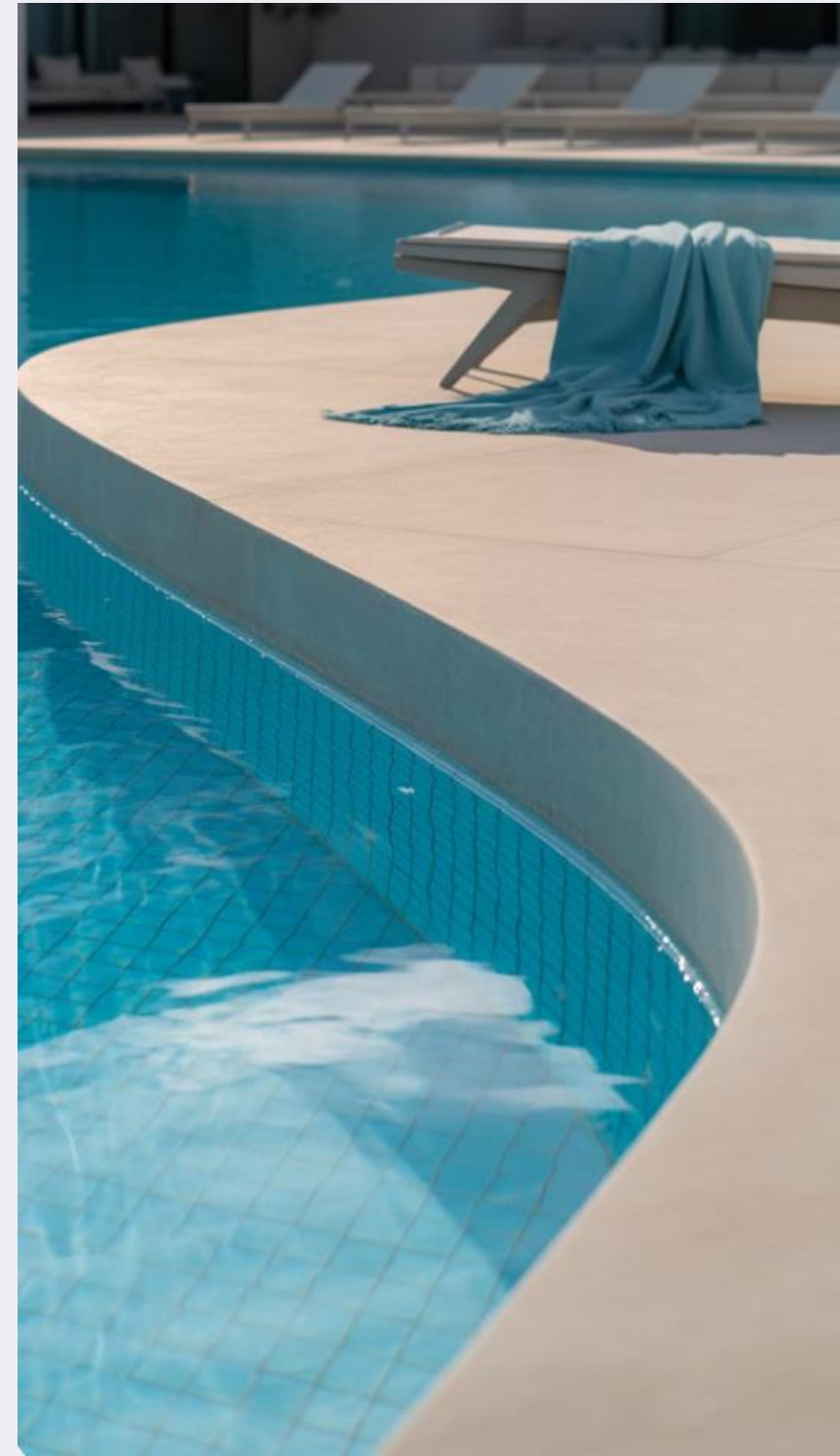
60,8%

Focus on
Leak Reduction



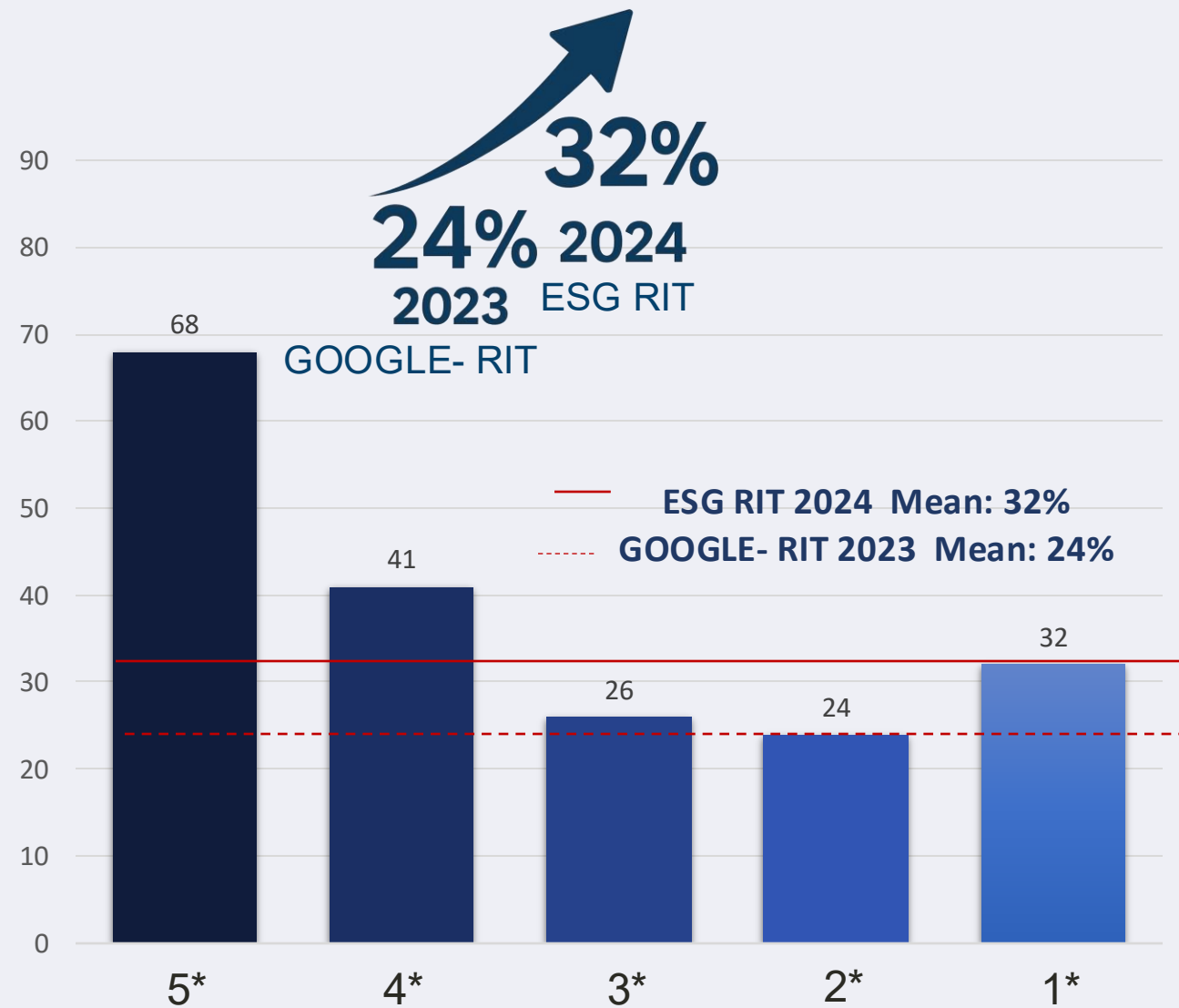
5,9%

Use Seawater
in their pools

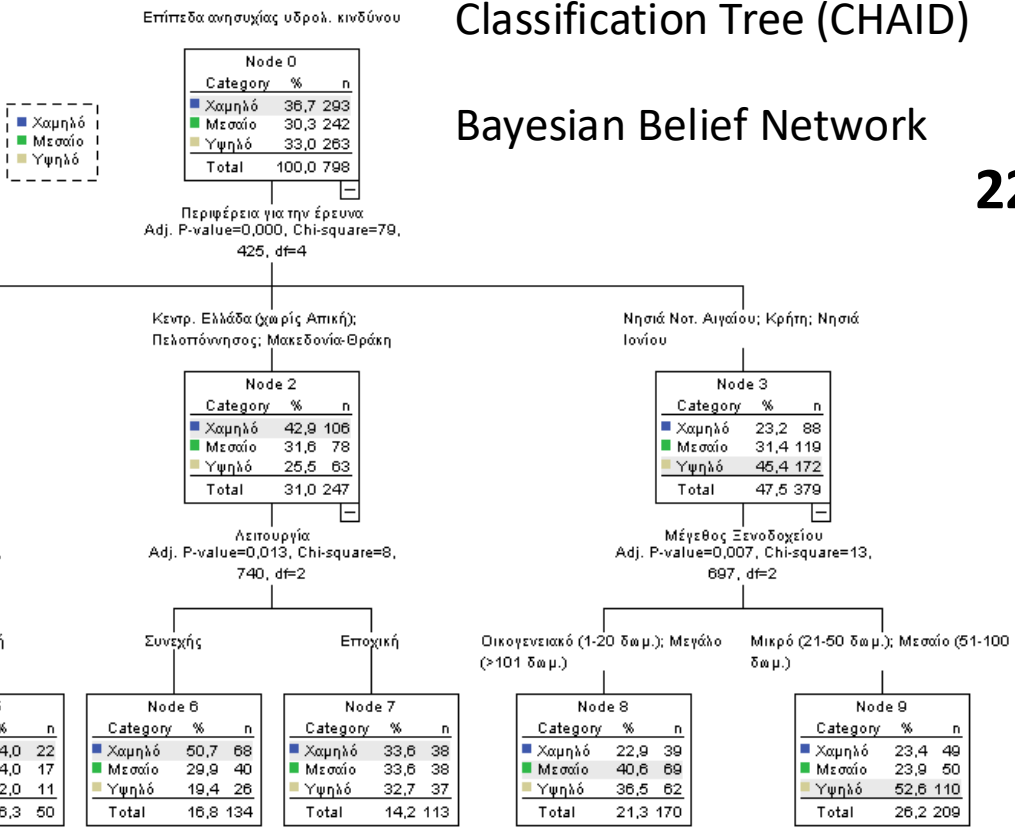
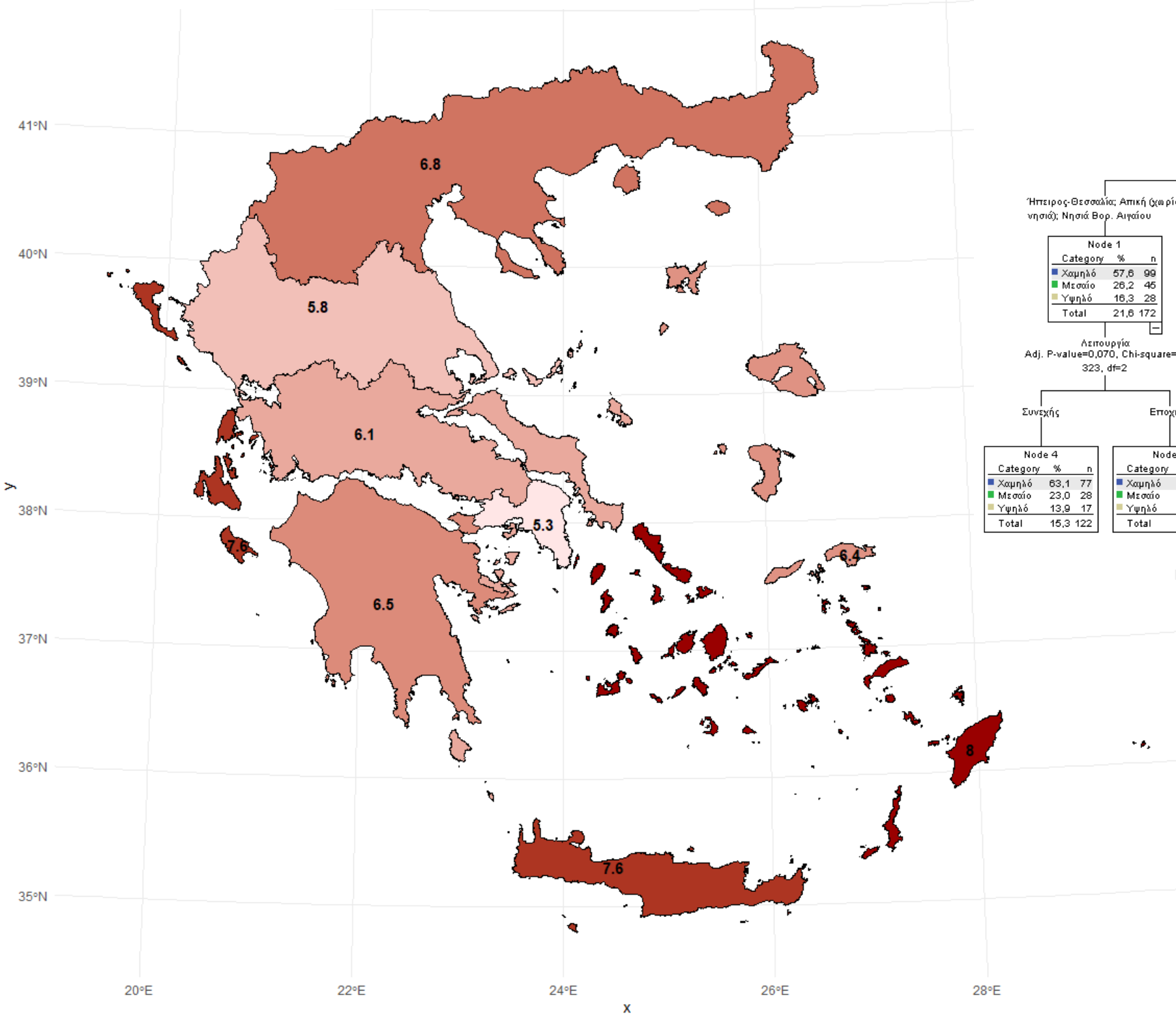


Water Monitoring & Reporting Systems and Consumption Reduction Targets 21

Increase in the percentage of hotels that have a water consumption recording and monitoring system:



Hydrological Risk Assessment Map by Survey Region



Classification Tree (CHAID)

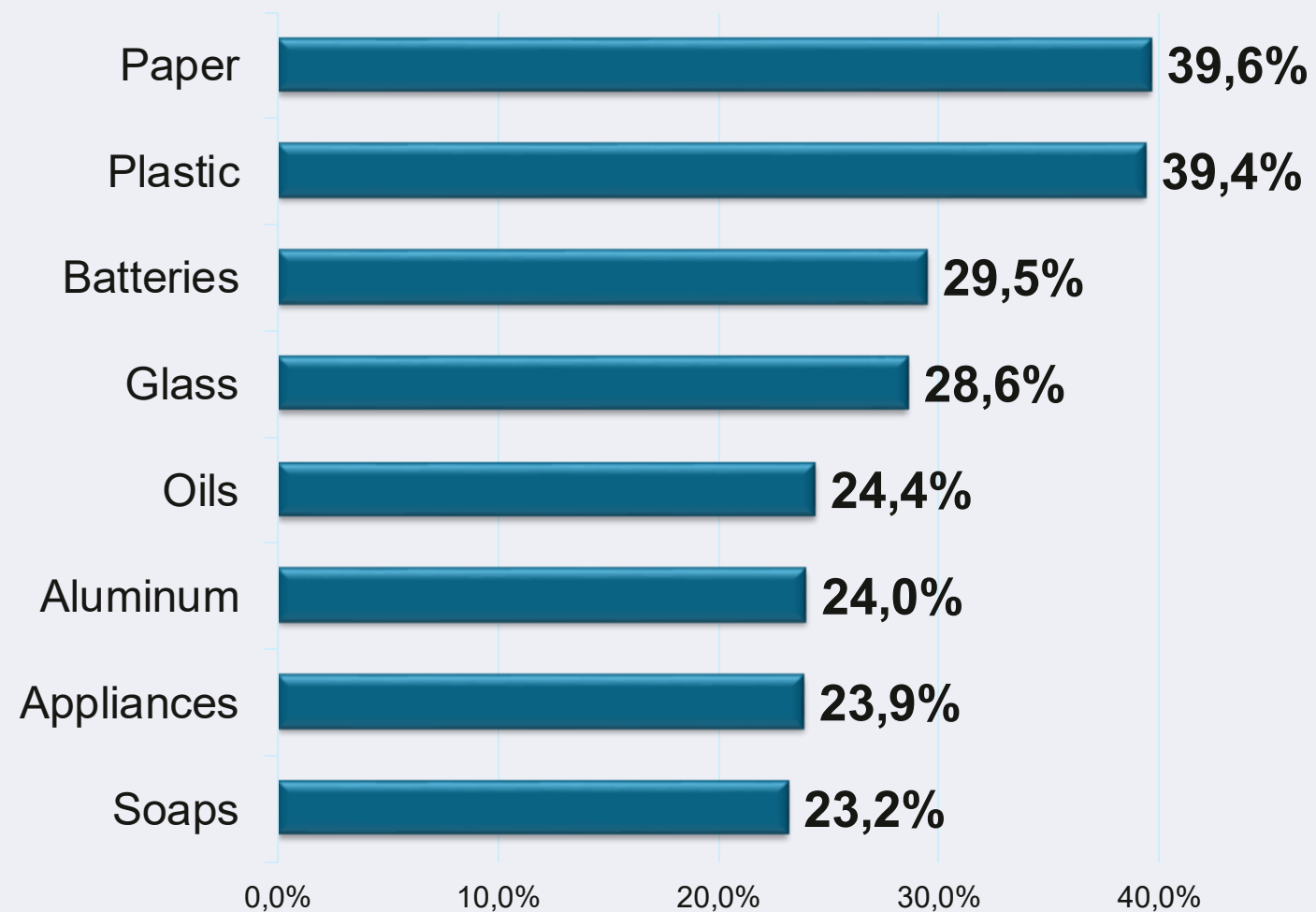
Bayesian Belief Network

Survey Region	Hydrological Risk Assessment
South Aegean Islands	8.0
Crete	7.6
Ionian Islands	7.6
Macedonia- Thrace	6.8
Peloponnese	6.5
North Aegean Islands	6.4
Central Greece	6.1
Epirus- Thessaly	5.8
Attica	5.3

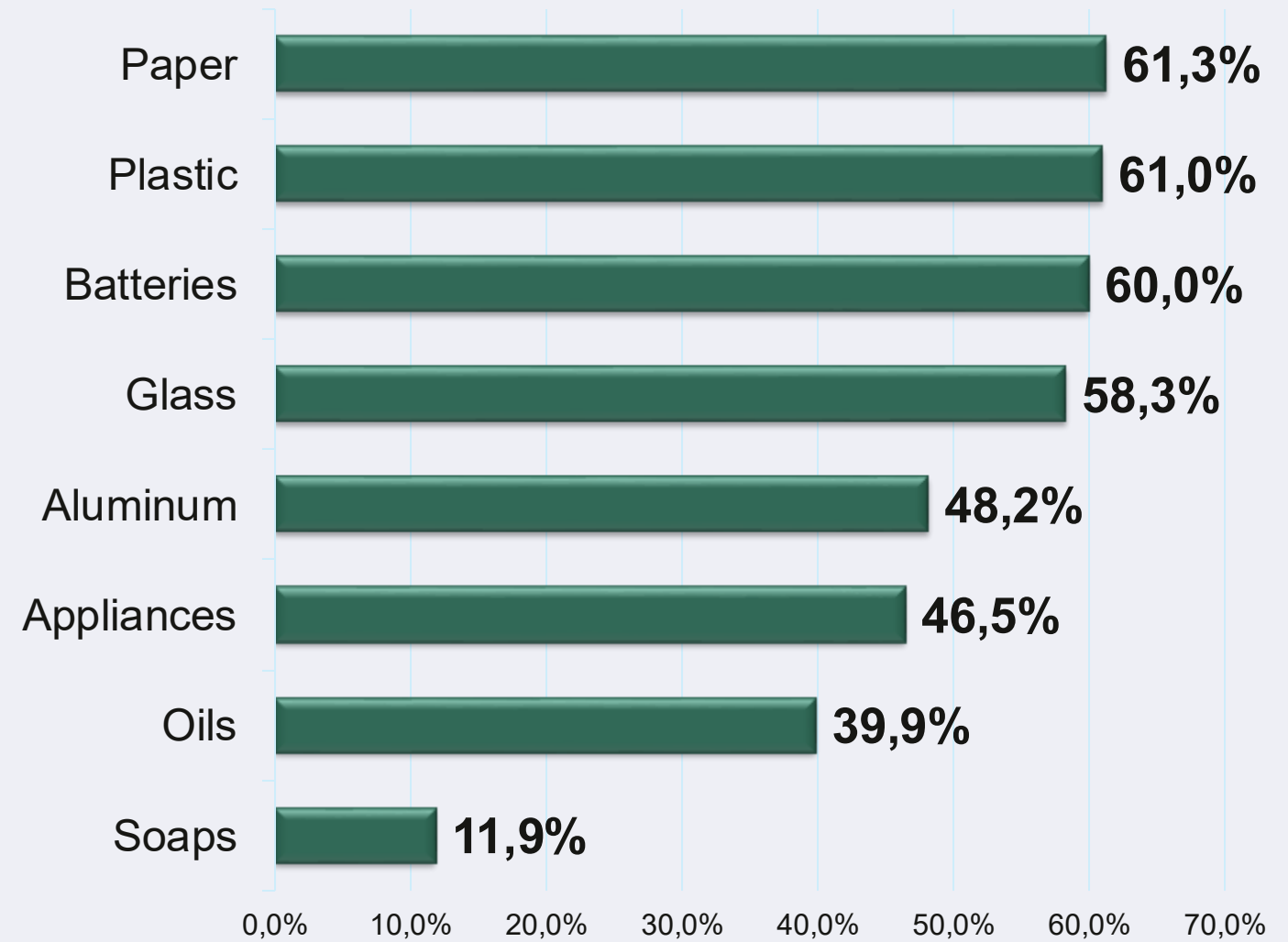


ESG.3

WASTE MANAGEMENT



* Multiple Answers.

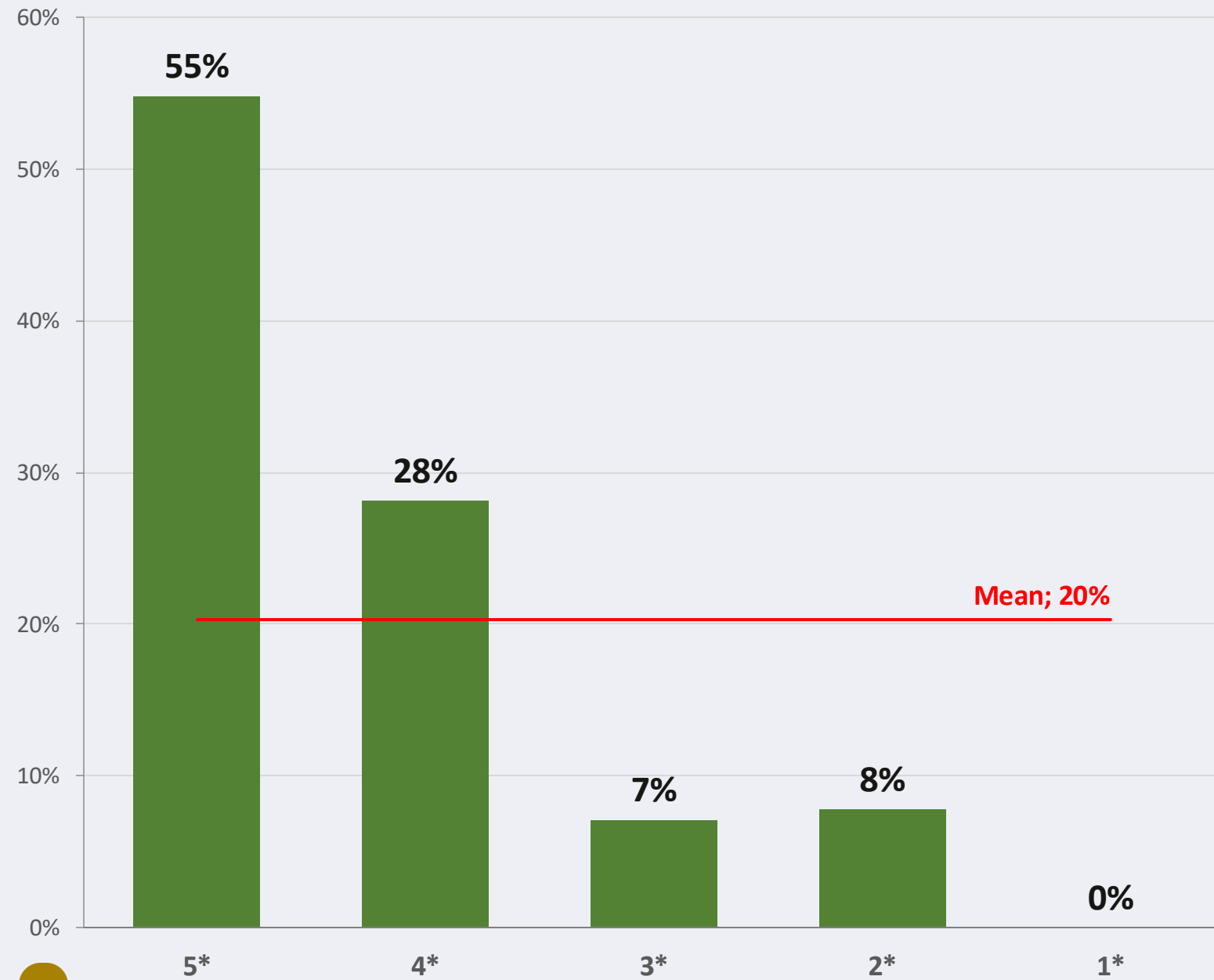


* Multiple Answers.



Food Waste Monitoring and Measurement Systems in Hotels with on-site Restaurants

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Greek Hotels Implementing Kitchen Waste Minimization Practices



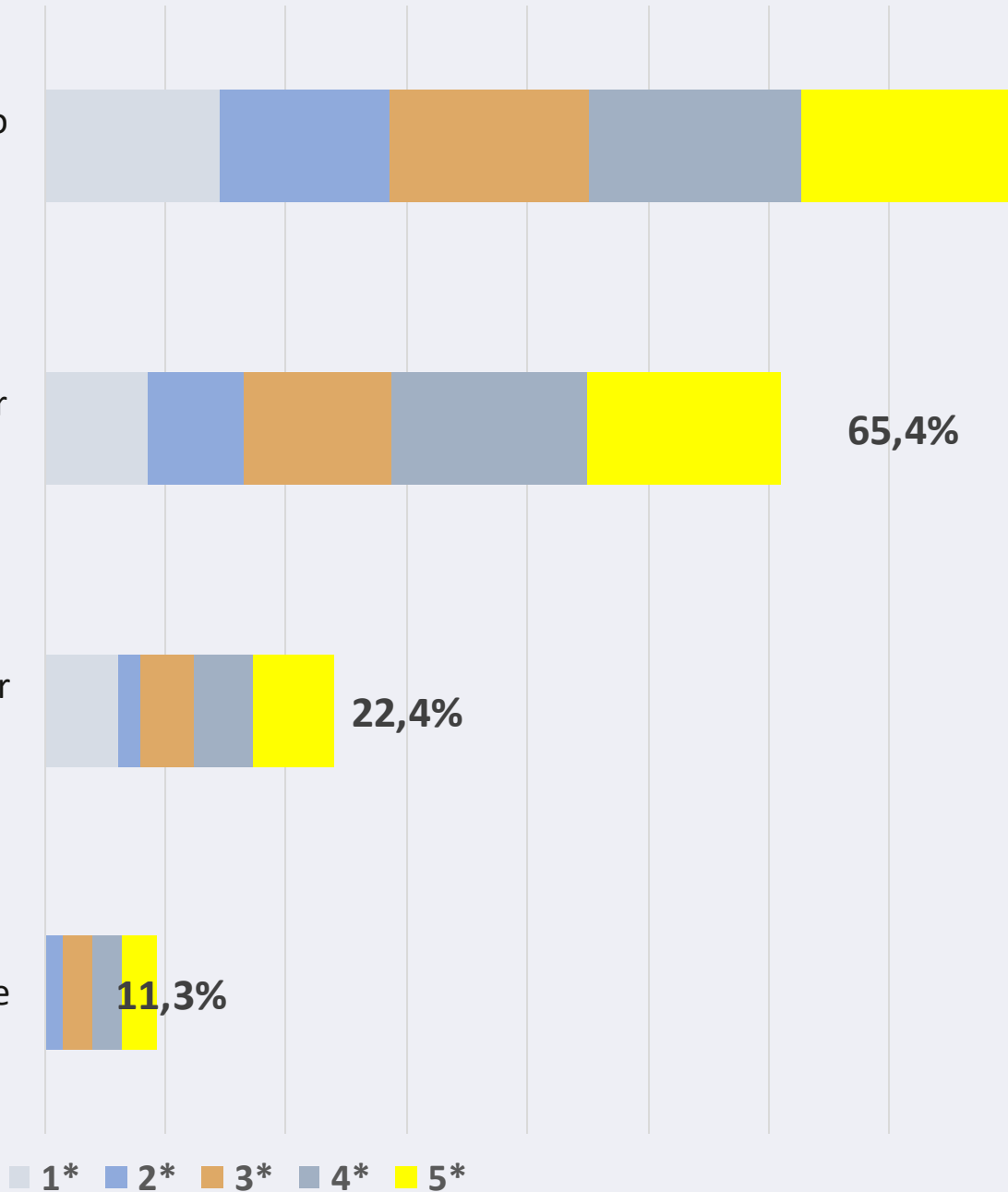
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Encouraging the chef and kitchen team to adopt food waste reduction practices

Staff meals (utilization of surplus food for employee dining)

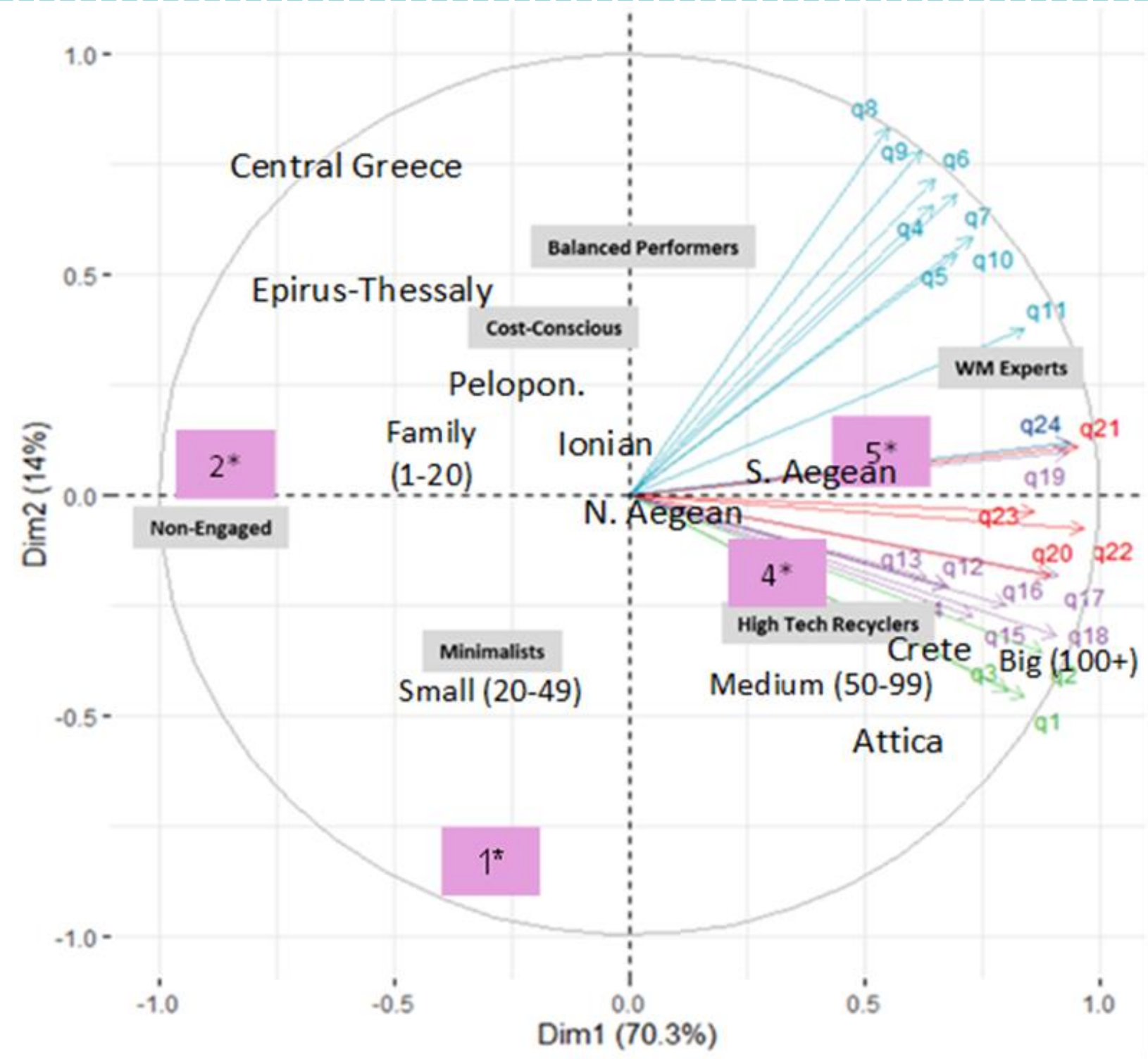
Donating free meals to individuals or organizations in need

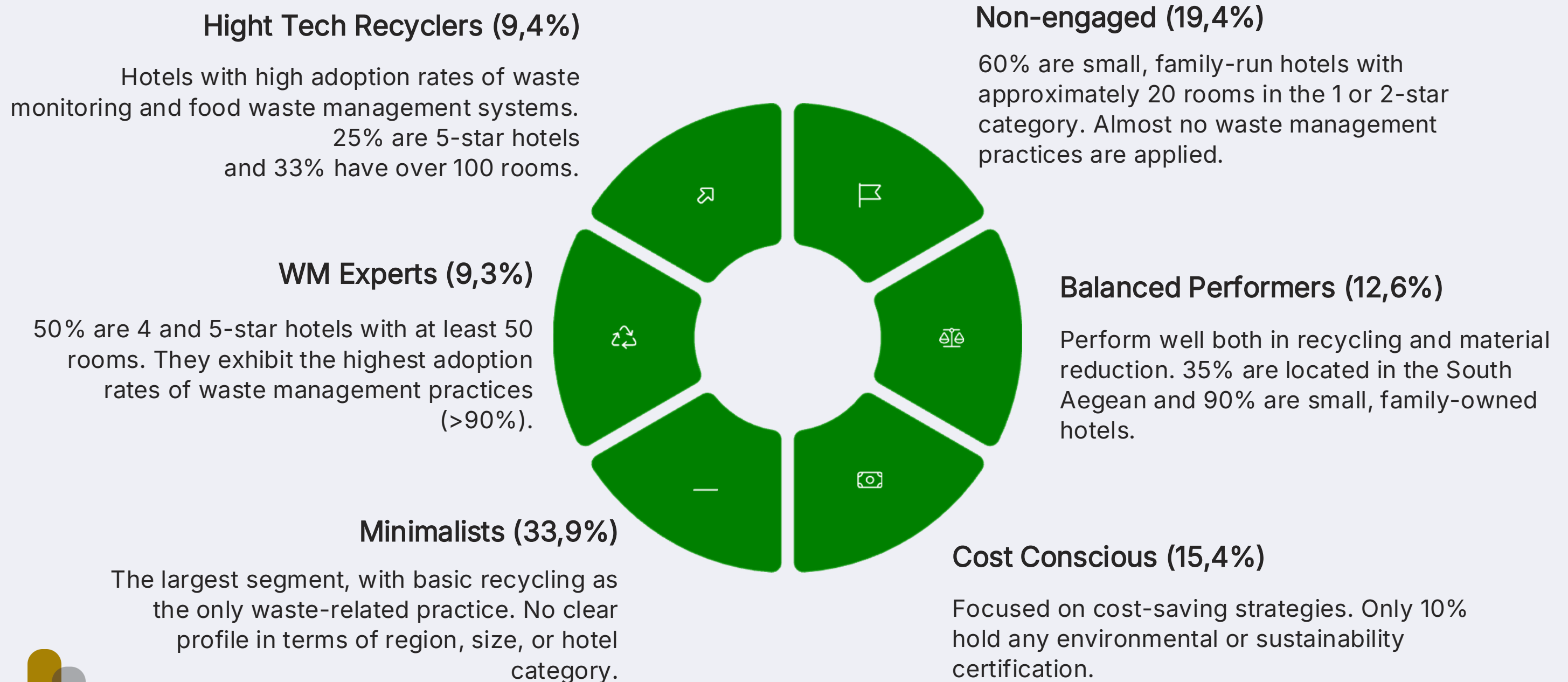
Composting of organic kitchen waste



Multivariate Profile Analysis of Greek Hotels Regarding Waste Management

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Input-Output Analysis: Cross-Sectoral Linkages Between the Hotel Sector and the Waste Management Sector

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We examine the interconnections between the hotel sector and the waste management sector in the Greek economy, using the Input-Output Analysis methodology.



The Hotel Sector

Shows low dependency on the waste management sector, both in terms of sales and purchases of inputs.



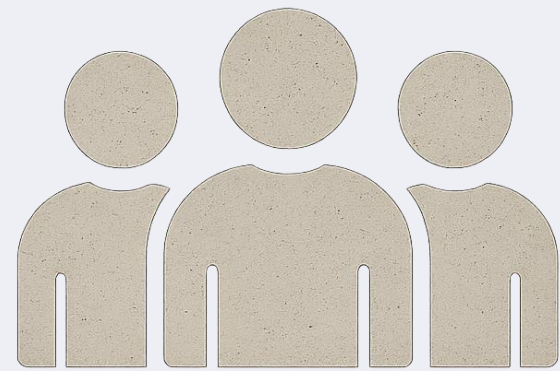
The Waste Management Sector

Exhibits high dependency on the hotel sector — both for selling its services (outputs) to hotels and for purchasing inputs from the hotel sector.



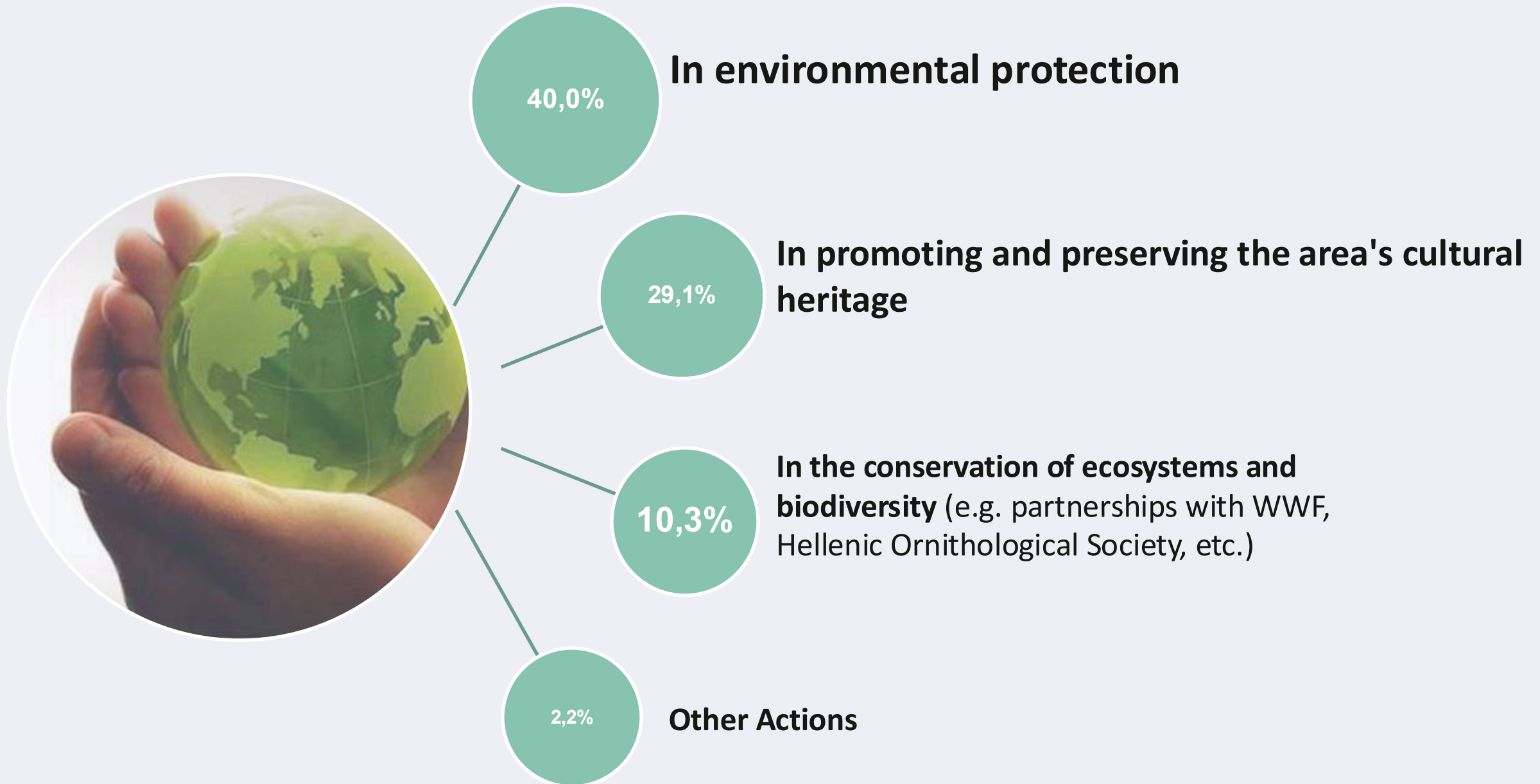
Cross-Sectoral Relationships

In conclusion, there is no mutual interdependence between the two sectors. Rather, the relationship appears to be one-sided, with the waste management sector depending on the hotel sector.



ESG.4

SOCIAL DIMENSION OF SUSTAINABILITY



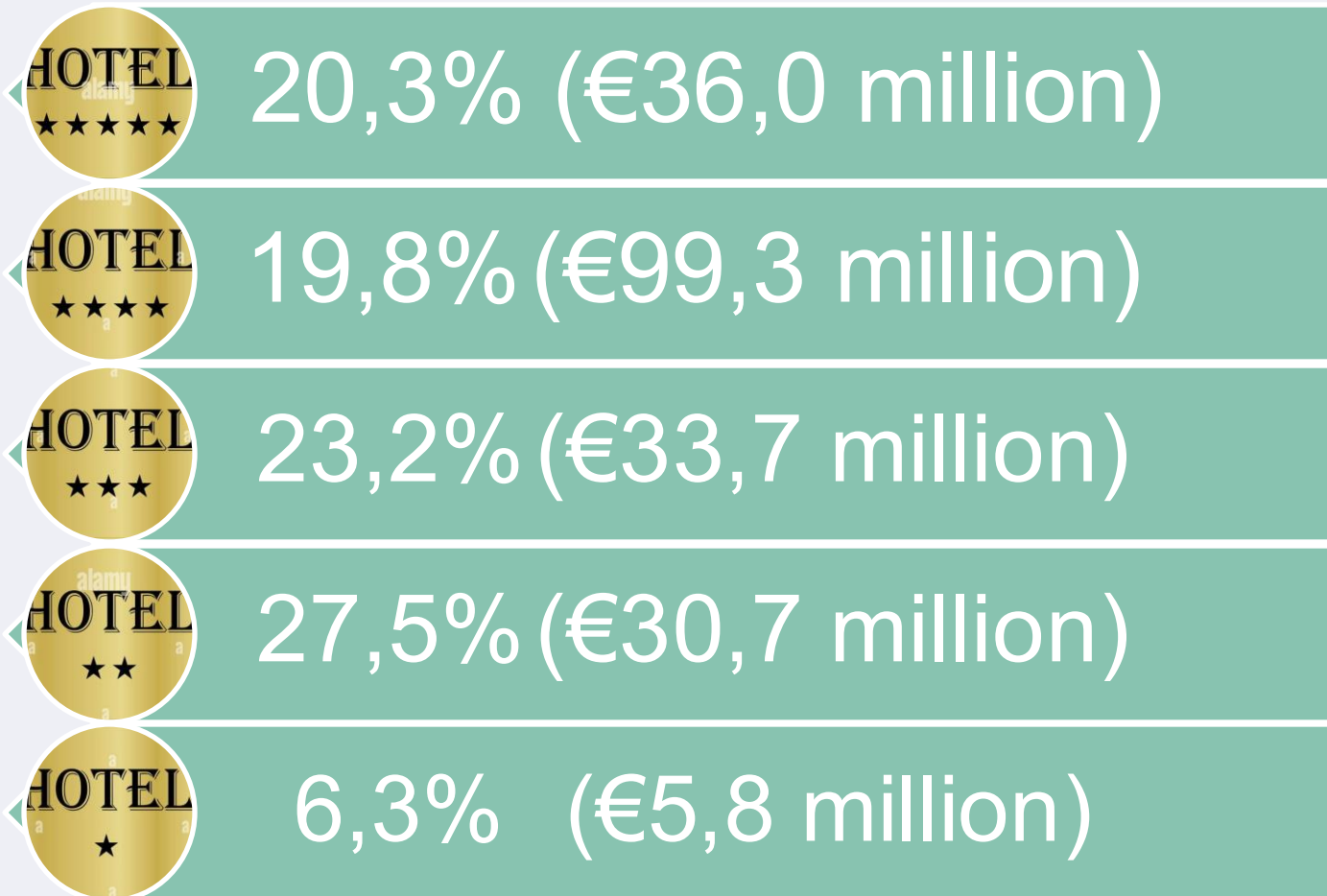


Hotel Investments in Sustainability Actions, 2024



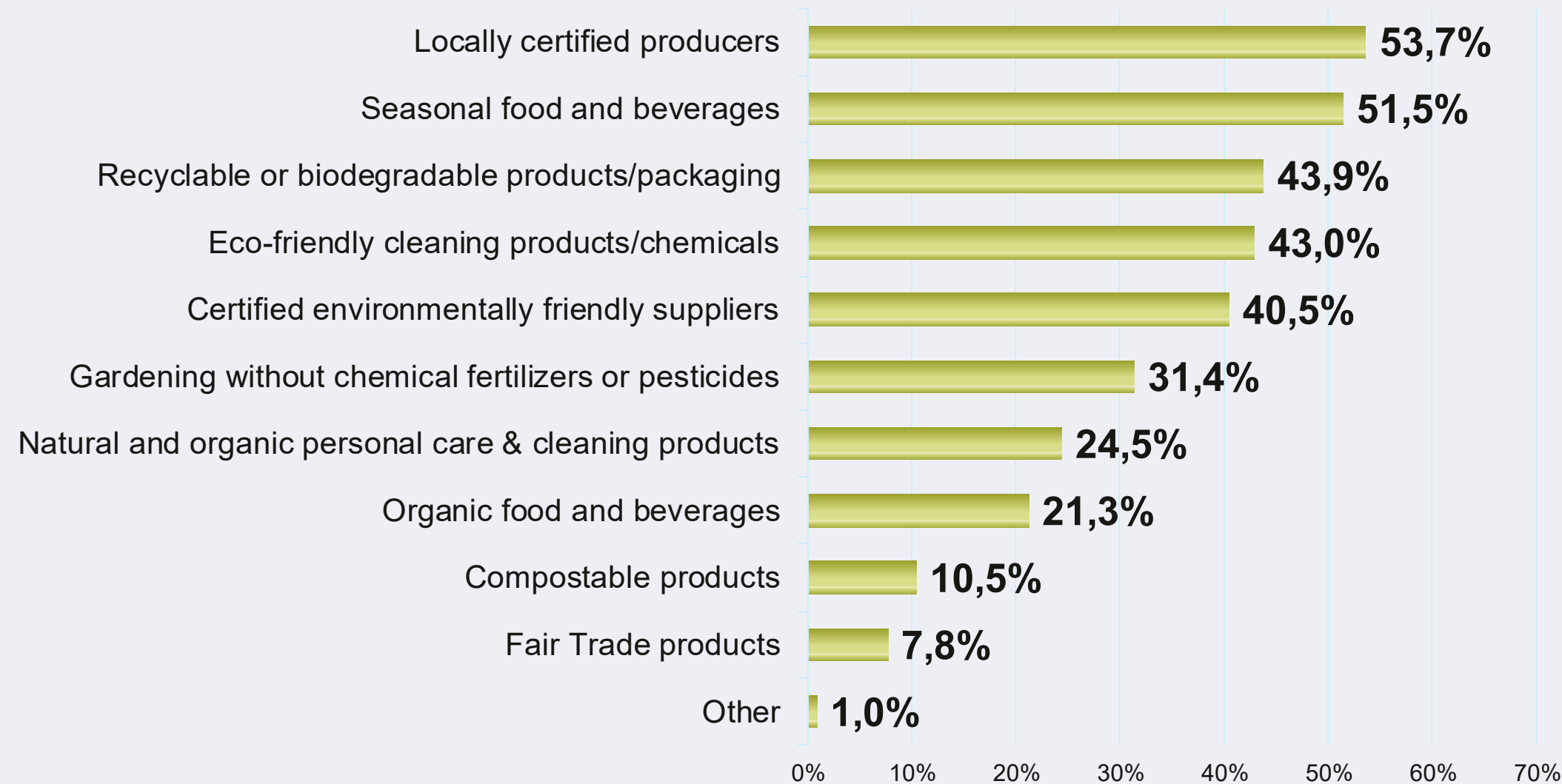
In 2024, investments by Greek hotels exceeded **€1 billion**.

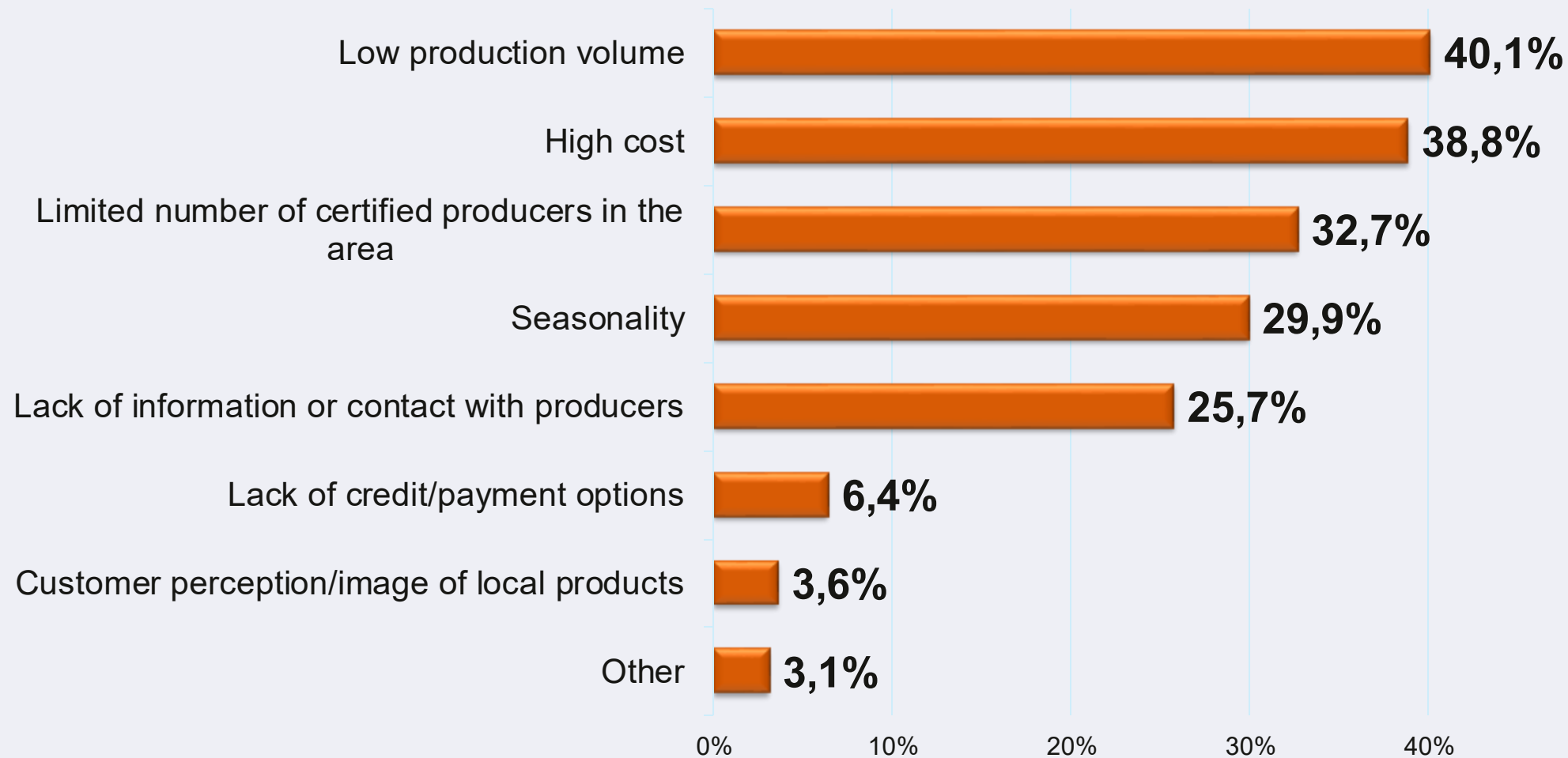
Out of this, **20%**, or **€200 million**, was allocated to sustainability-related actions.



Types of Products Used by Hotels – Percentages

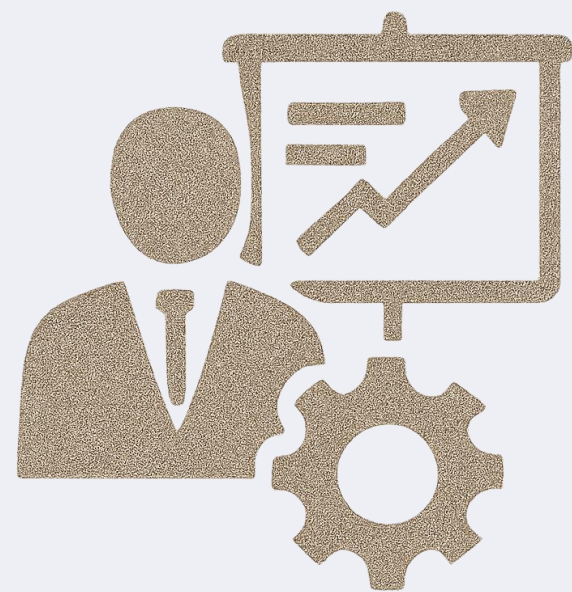
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*Multiple Answers, max. 3.





ESG.5

CORPORATE GOVERNANCE & MANAGEMENT



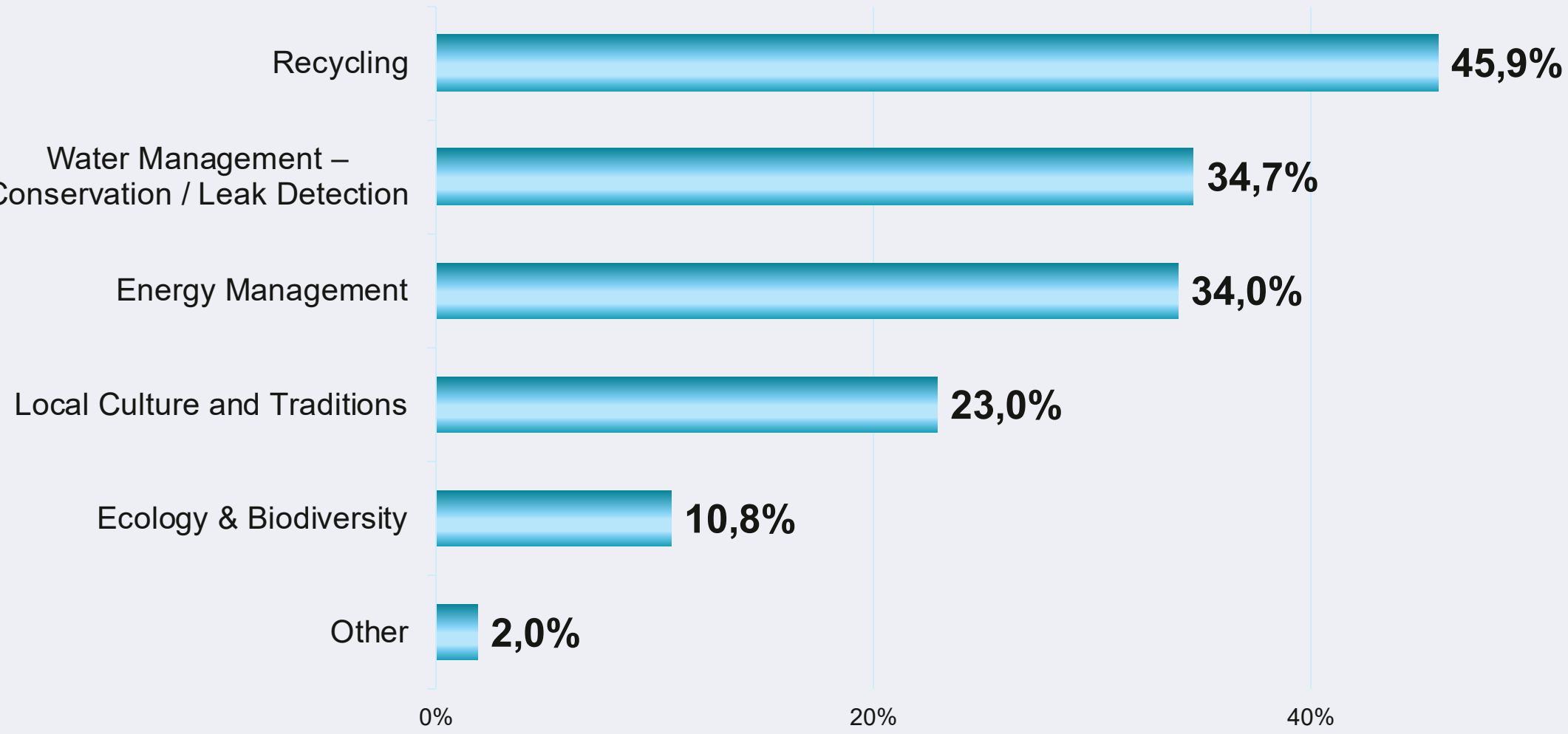
Increase in the percentage of hotels informing guests about **reducing the carbon footprint of their stay.**



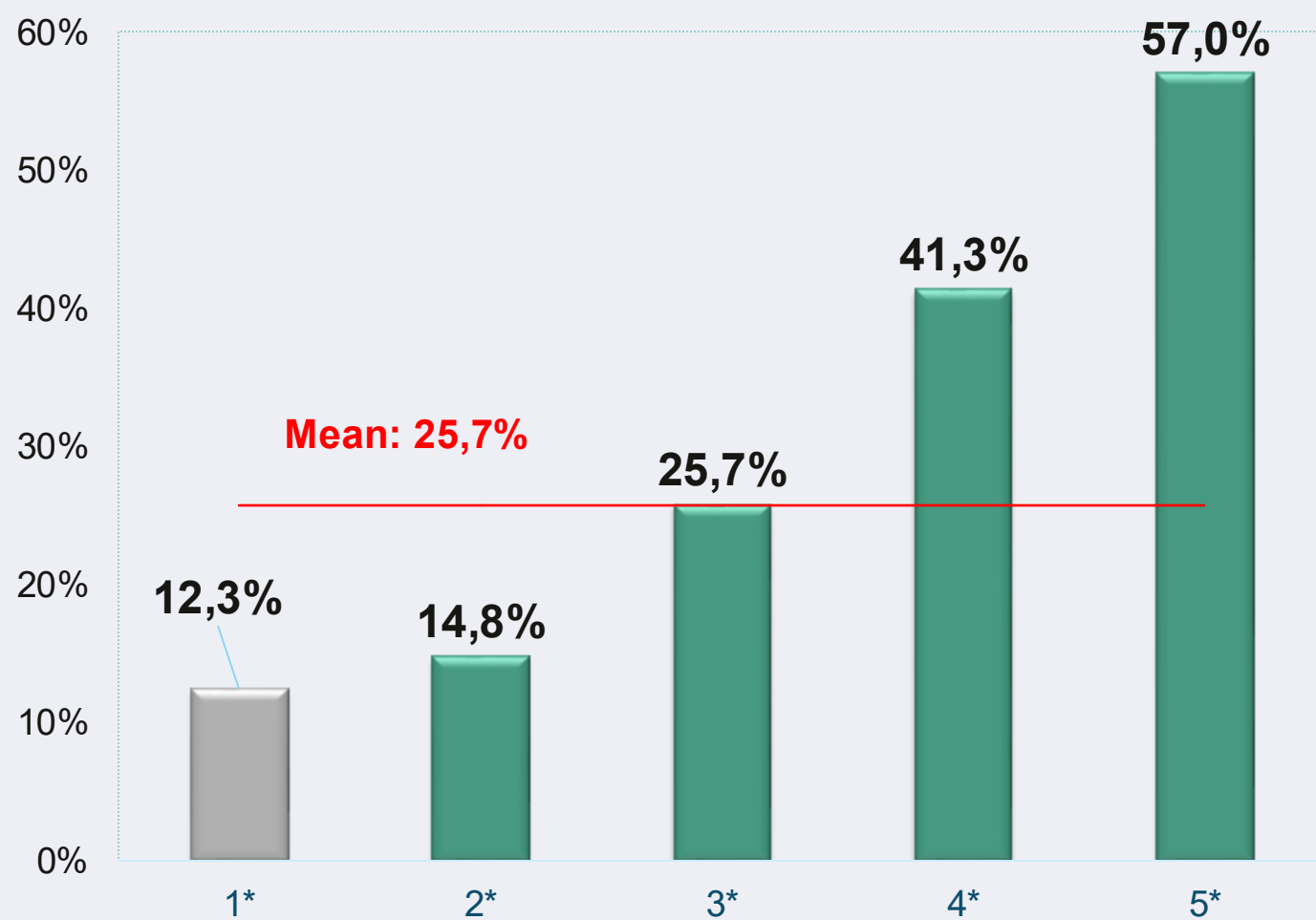
Category	GOOGLE- RIT 2023	RIT- HCH 2024
5*	61%	53%
4*	42%	38%
3*	35%	30%
2*	27%	25%
1*	26%	25%



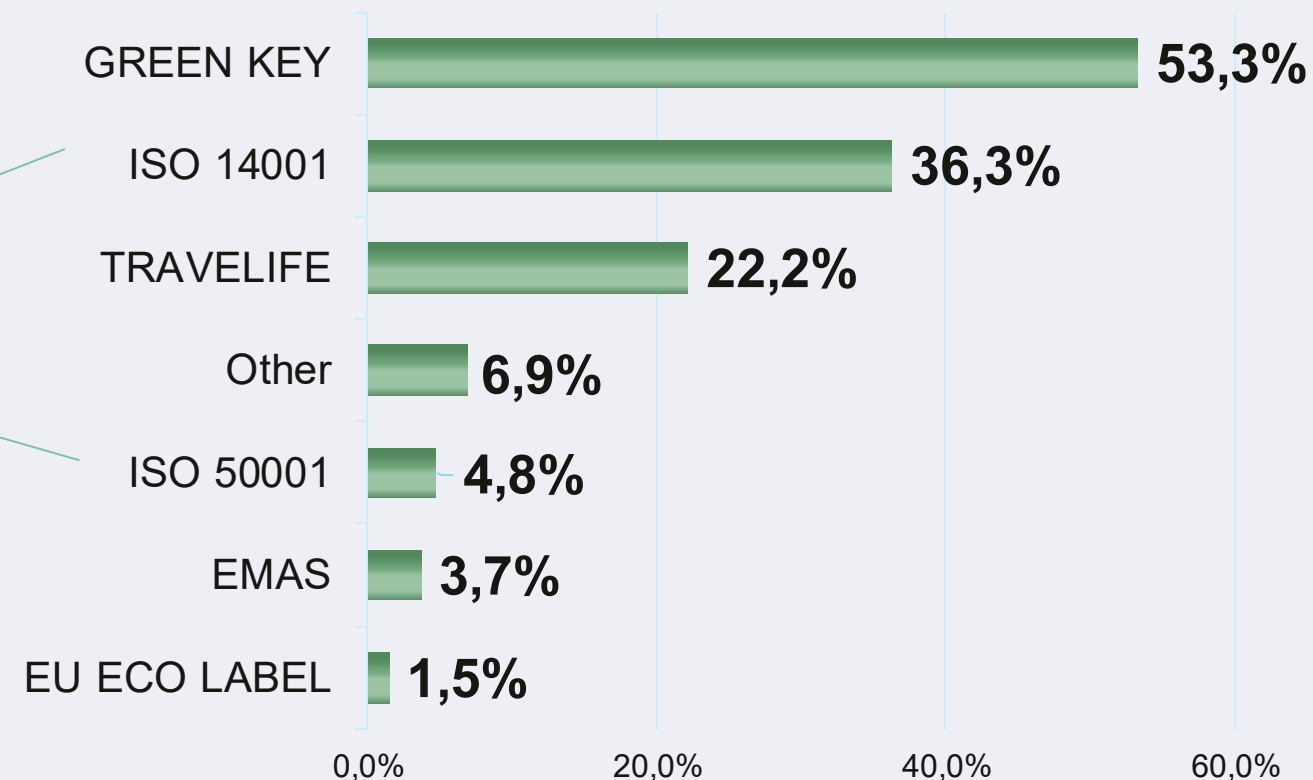
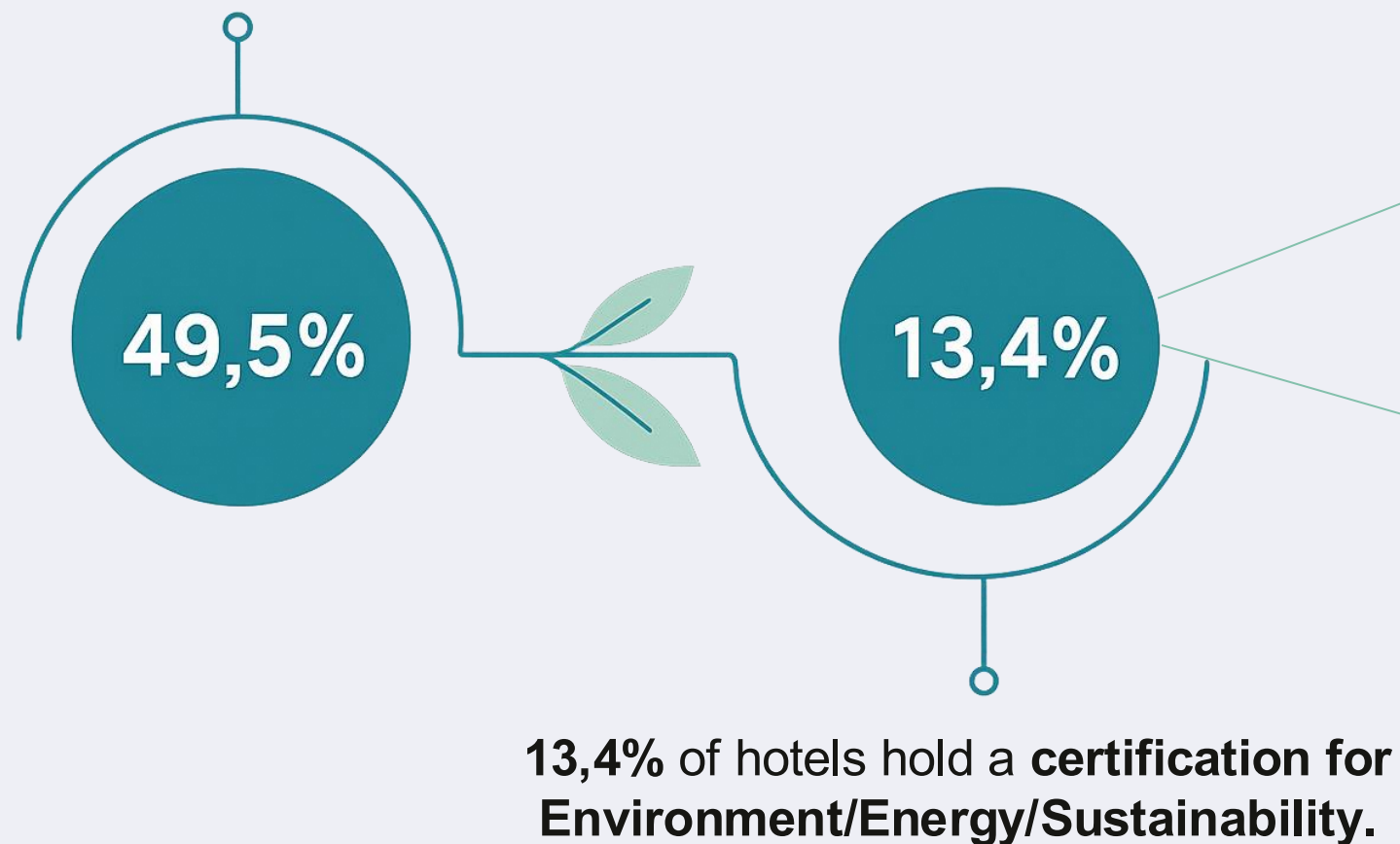
Percentage of Hotels Implementing Staff Training and Awareness Programs on Sustainability Issues



Percentage of Hotels Implementing Corporate Social Responsibility (CSR) Actions Related to the Environment and Local Community, **by category**:



49,5% of hotels hold an
**Energy Performance Certificate
(EPC).**



* Multiple Answers.

* Independent questions.

- The analysis of the RIT/HCH - ESG 2024 survey data, combined with relevant findings from other RIT studies, clearly demonstrates that Greek hotels are gradually moving towards a more sustainable operational model.
- Levels of commitment, goal-setting, and awareness are high across all hotel categories, but progress- especially on a technological level- remains uneven.
- Larger and higher-category hotels are making significant investments in new technologies and systems to monitor and implement their sustainability goals.
- Smaller and lower-category hotels tend to adopt more immediate, visible, and cost-effective solutions, while more technically demanding projects and investments are applied to a limited extent.
- This highlights the urgent need for information, training, incentives, and subsidies for technological upgrades aimed at their sustainable development, as well as strategic support from the State and local authorities.
- The ESG 2025 survey will launch in the summer with the aim of updating previous results and assessing the evolution of sustainability indicators in Greek hotels.



SUSTAINABLE DEVELOPMENT GOALS



Thank You!