



The Use of Artificial Intelligence in the Operation of Greek Hotels

A European-Level Study in Collaboration with the University of Switzerland



Survey Identity

Survey Title	The Use of Artificial Intelligence in the Greek Hotel Sector
ASSIGNING AUTHORITY	Hellenic Chamber of Hotels (HCH)
CONDUCTING BODY	Research Institute for Tourism (RIT)
REFERENCE PERIOD	2025
SURVEY TIME PERIOD	11 th of May 2025 – 15 th of April 2025
DELIVERABLE DATE	May 2025
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=474/ N=10.104
COLLECTION METHOD	CAWI



CONTENTS

3

1. GENERAL CHARACTERISTICS OF HOTELS IN THE SURVEY

2. TECHNOLOGIES AND DISTRIBUTION/SALES STRATEGIES

3. ARTIFICIAL INTELLIGENCE – AI



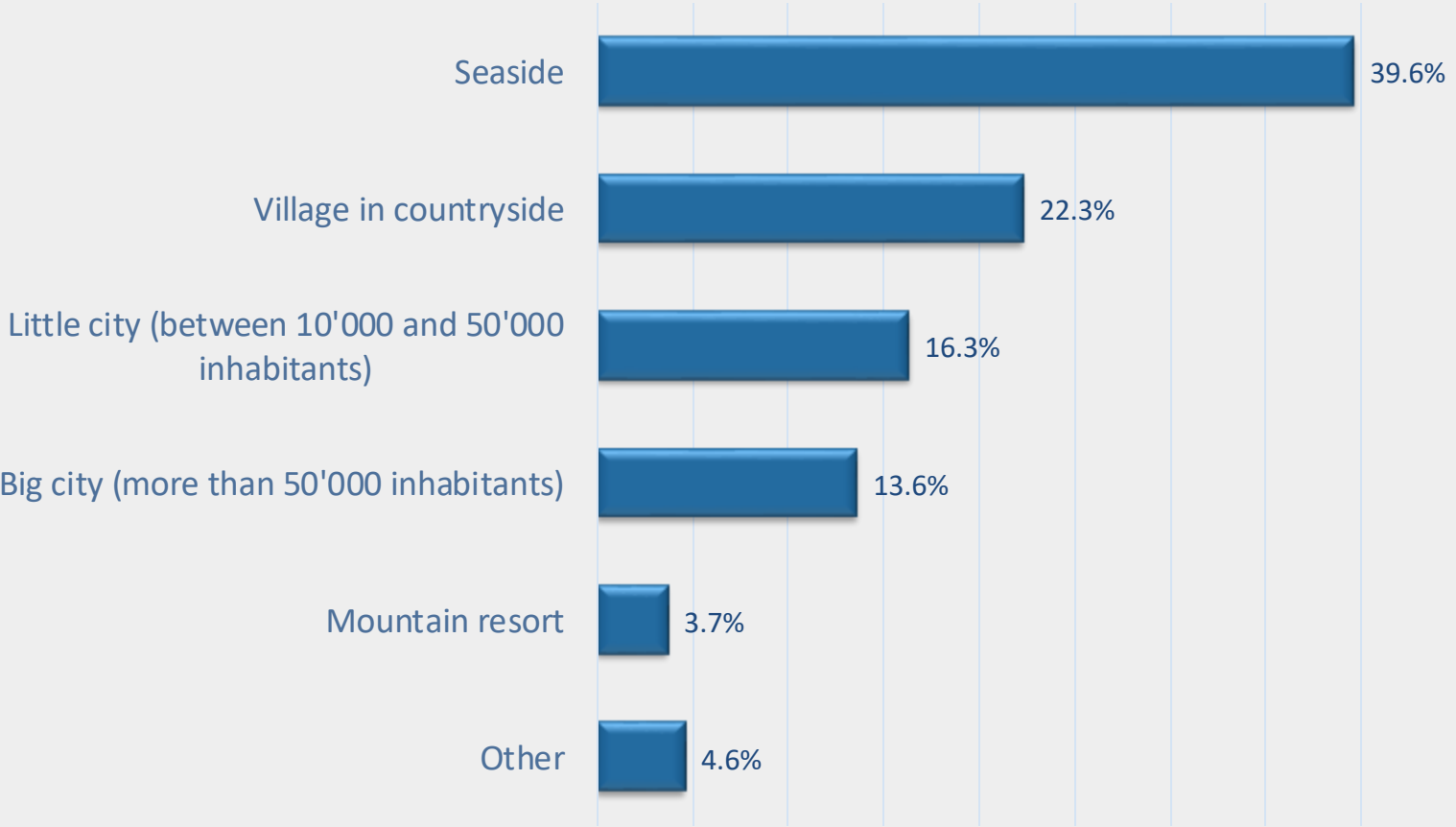
1

GENERAL CHARACTERISTICS OF HOTELS IN THE SURVEY





Hotel Distribution by Location



The majority of the hotels participating in the survey are located in **seaside areas (39,6%)**. Followed by hotels situated in **villages in the countryside (22,3%)**.



General Hotel Characteristics: Purpose of Visit

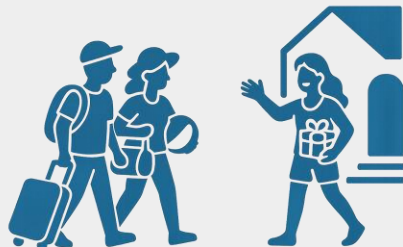
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Hotel Guest Profile Based on Purpose of Visit



90,6% of guests stay at the surveyed hotels for **holiday and leisure purposes**.

7,1% of guests stay for **business purposes**, while only 0,7% visit for **conferences, exhibitions, or other events (MICE)**.



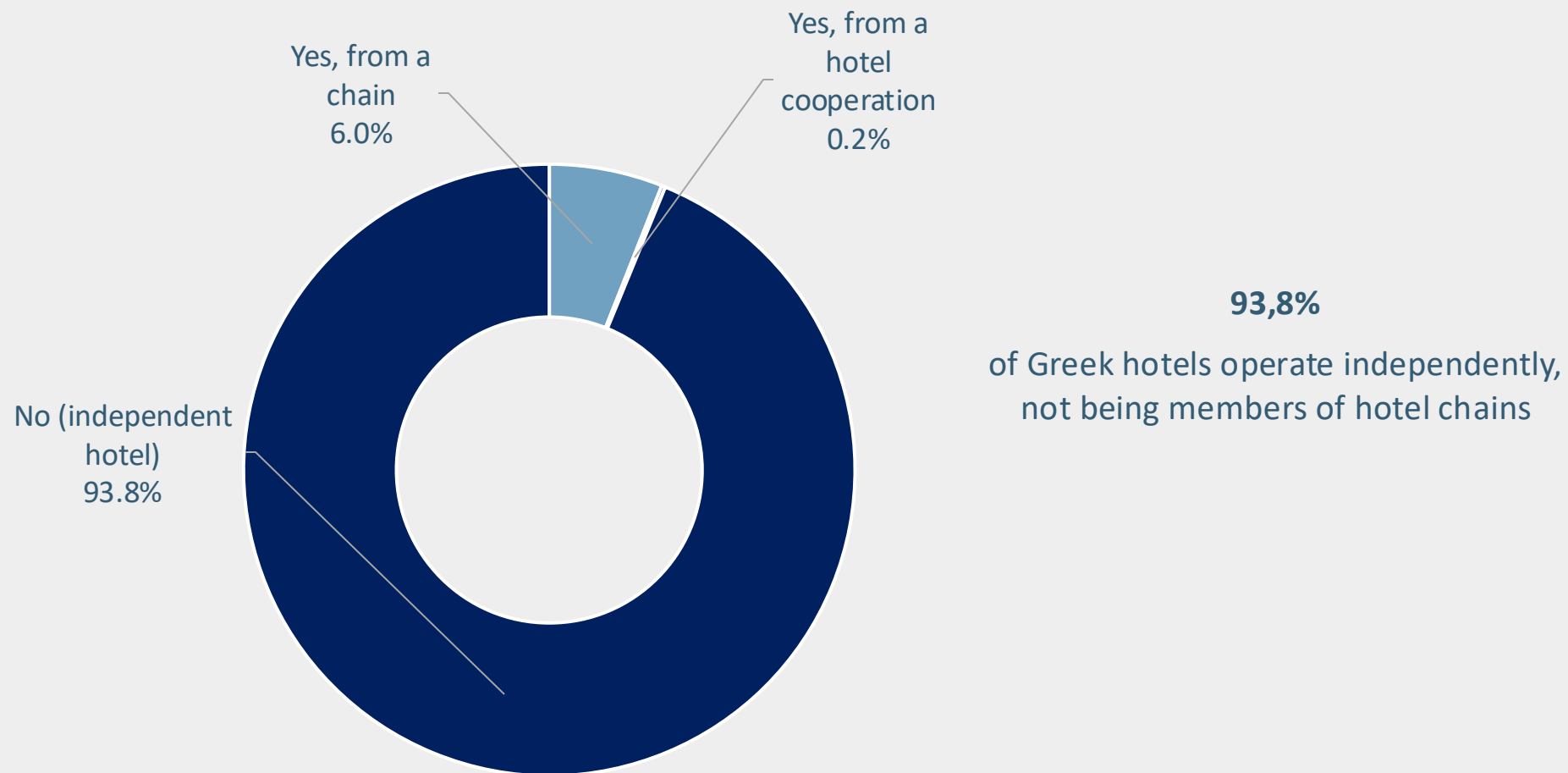
1,6% stay for **other reasons**, mainly to visit a student or a relative hospitalized in a nearby medical facility.



General Hotel Characteristics: Chain Affiliation

7

QUESTION: Is your hotel part of a hotel chain or a hotel cooperation?





2

Distribution/Sales Technologies and Strategies





31,5%

31,5% of hoteliers stated that they currently implement a **Revenue Management** strategy.

7,5% indicated they have plans to adopt **Revenue Management** strategy.

7,5%

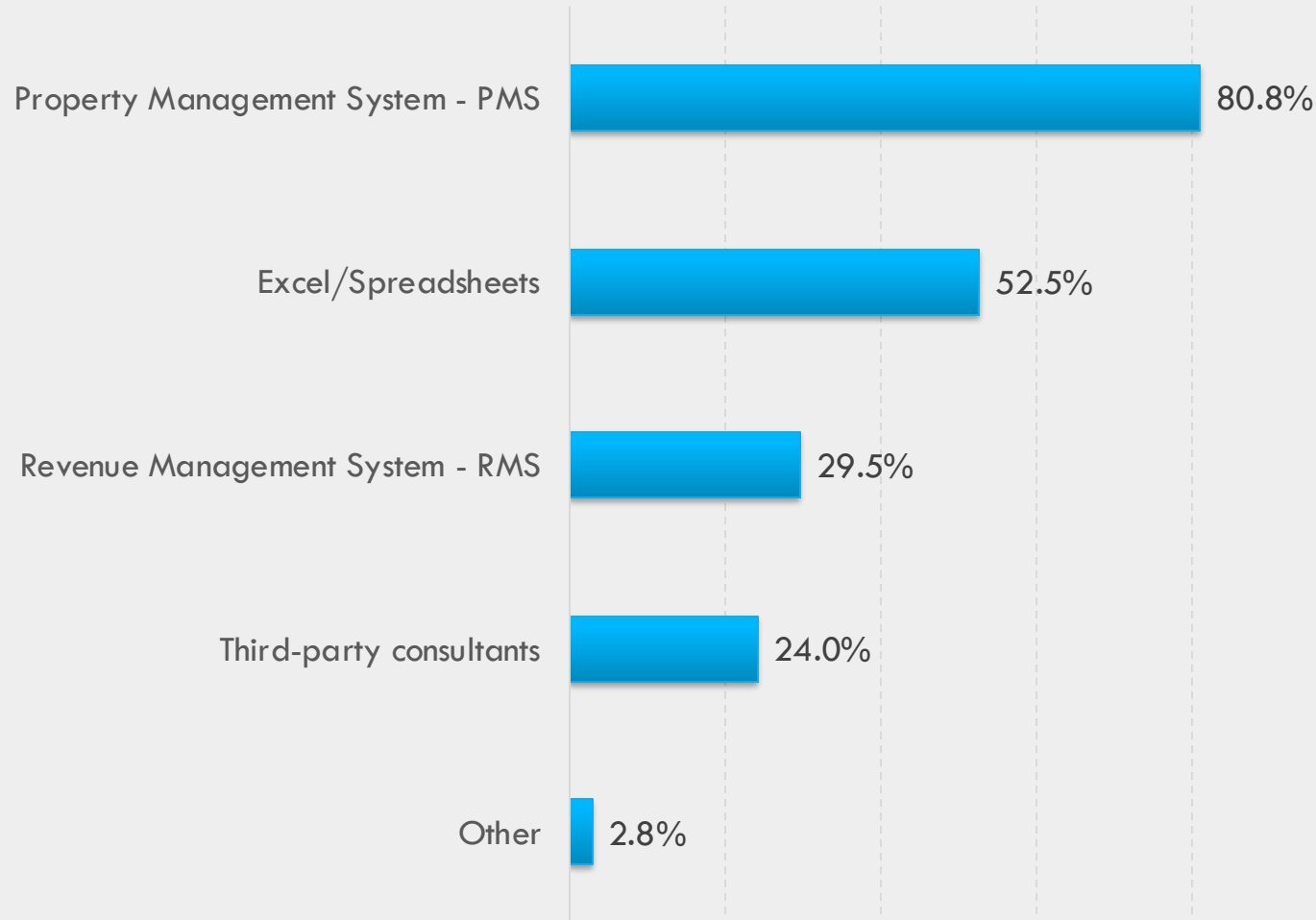




Hotels Using Revenue Management Tools

10

QUESTION: Does your hotel currently implement a revenue management strategy?



Hotels that reported implementing a revenue management strategy represent 31,5%.

Among them, the majority use **Property Management Systems (PMS) (80,8%)** and **Excel/Spreadsheets (52,5%)**.

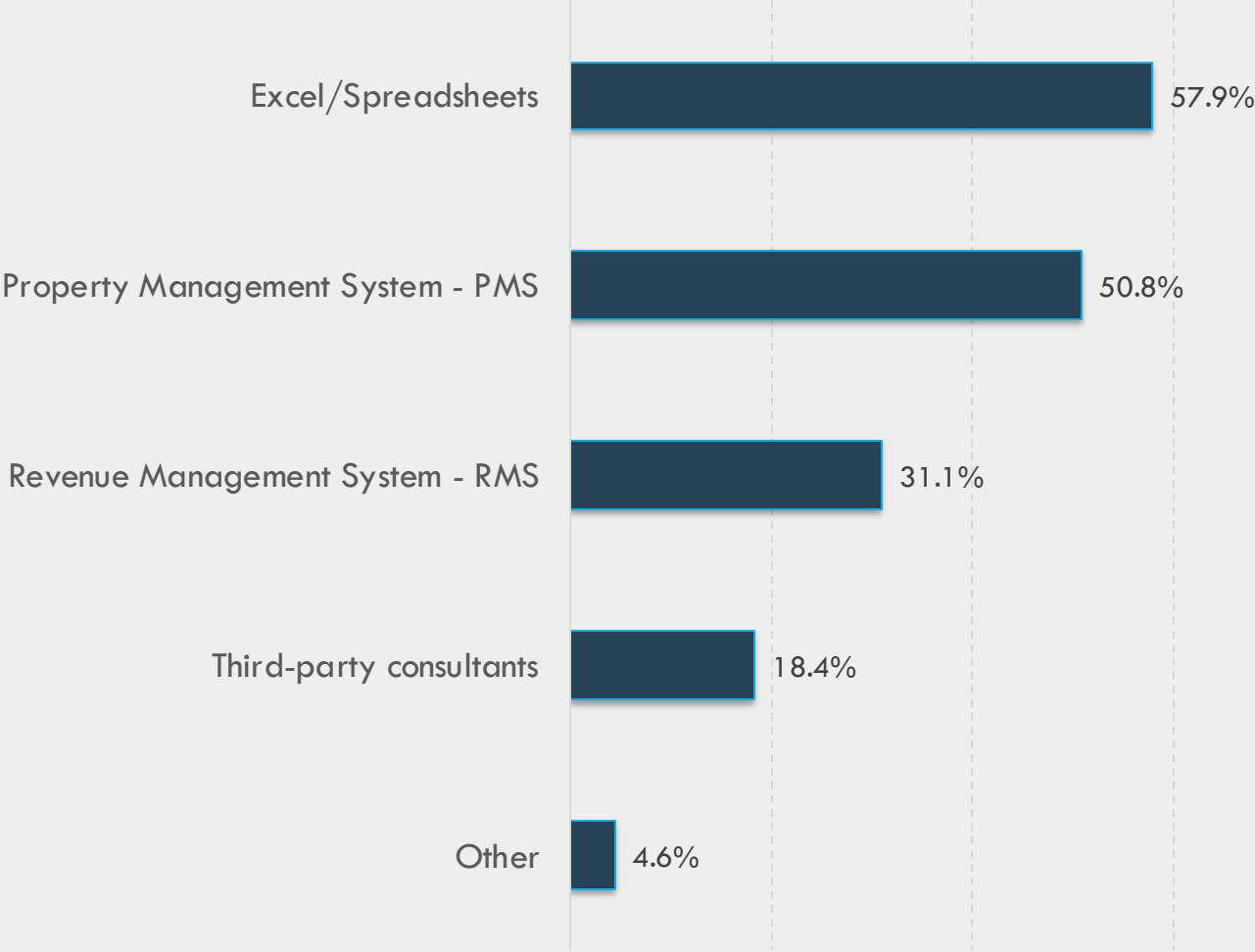
Only **29,5%** use dedicated **Revenue Management Systems (RMS)**, while **24%** rely on external consultants.

* Multiple Answers.



Hotels Planning to Use of Revenue Management Tools

***QUESTION:** Is your hotel planning to implement a Revenue Management strategy? **



7,5% of hotels indicated an intention to implement a revenue management strategy.

Among them, **57,9%** prefer using **Excel/Spreadsheets**, and **50,8%** favor **Property Management Systems (PMS)**.

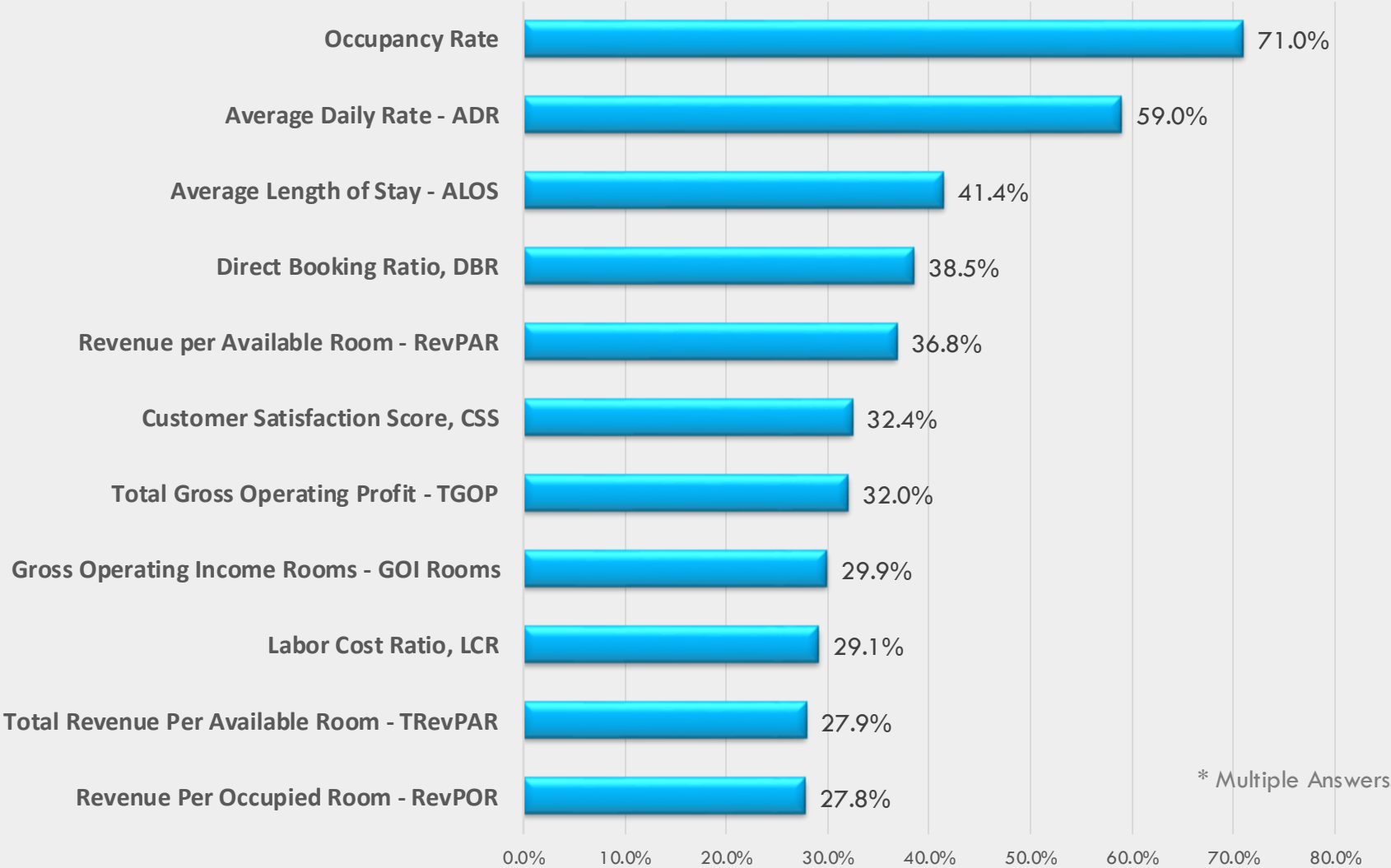
At the same time, the intention to use **Revenue Management Systems (RMS)** stands at **31,1%**, while **18,4%** plan to rely on **external consultants**.

* Multiple Answers.



Monitoring of Key Performance Indicators (KPIs) – 1

***QUESTION:** Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel's performance? **

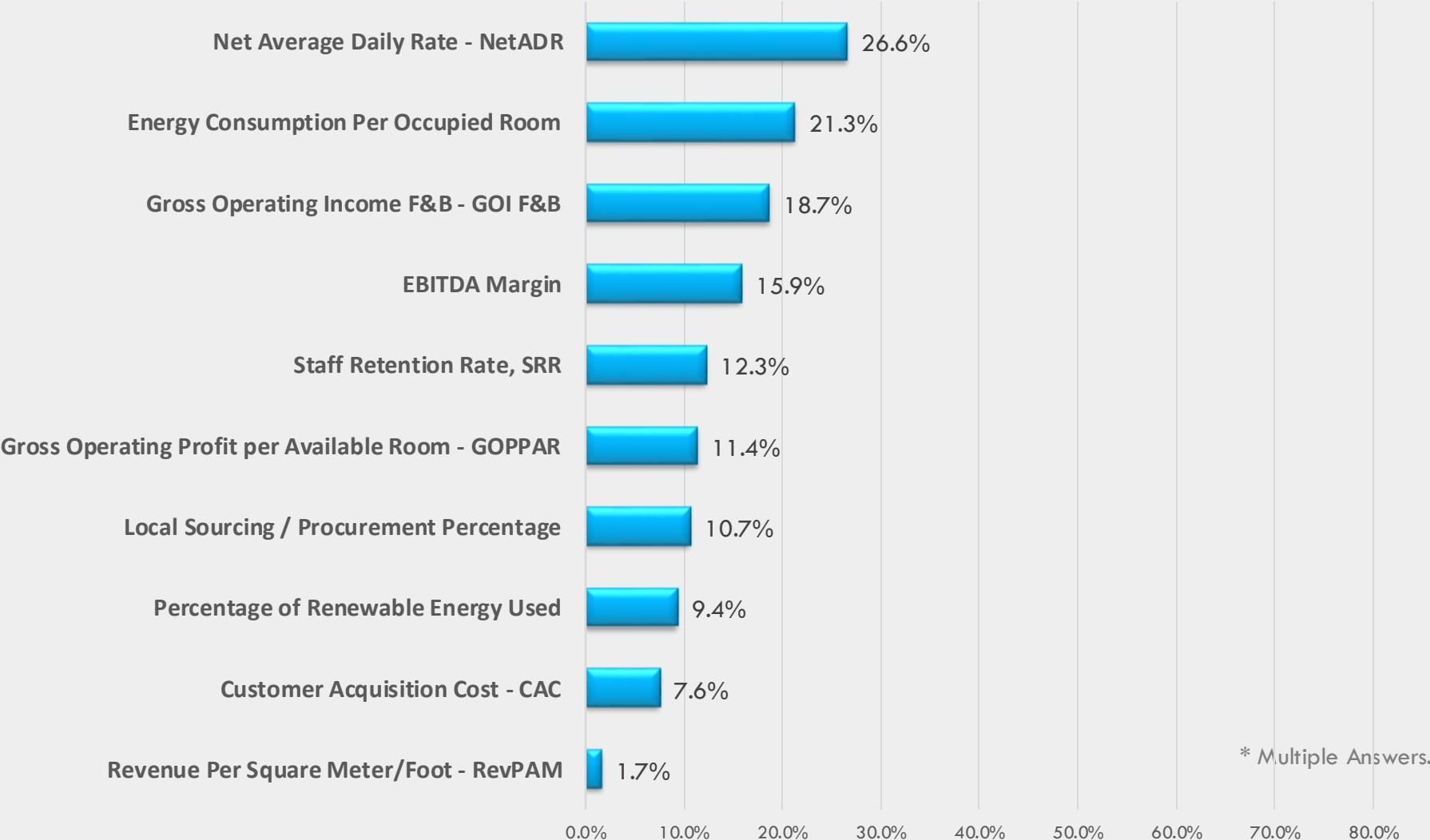


* Multiple Answers.



Monitoring of Key Performance Indicators (KPIs) – 2

***QUESTION:** Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel’s performance? **



* Multiple Answers.



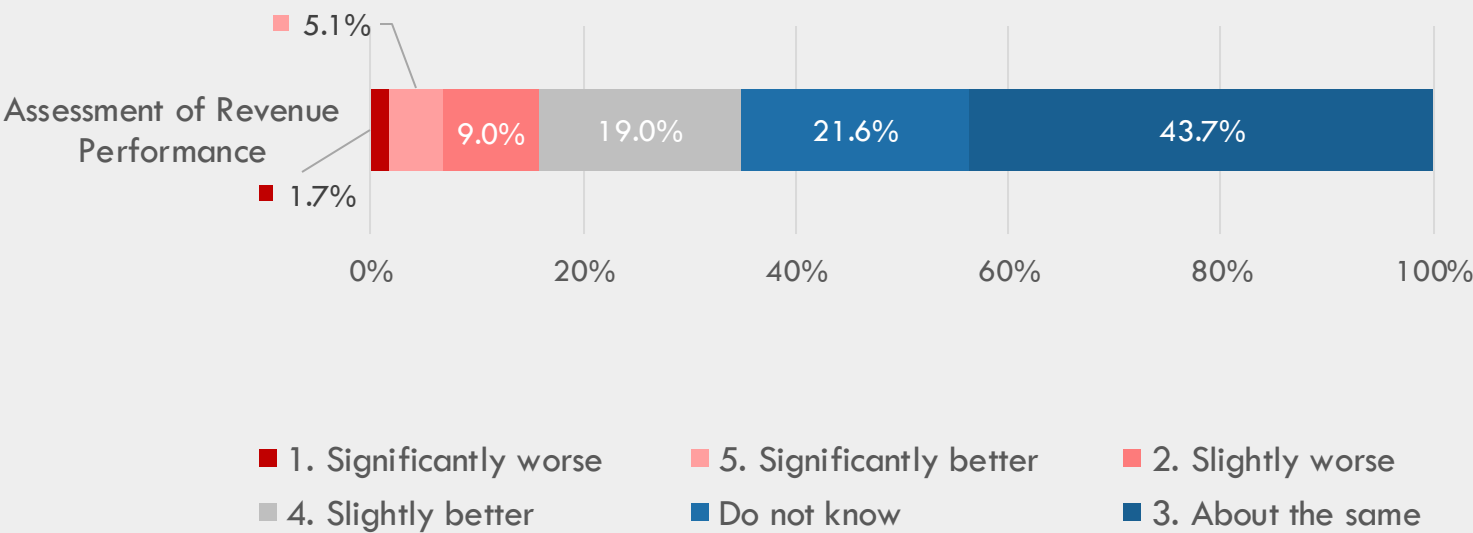
Monitoring of Key Performance Indicators (KPIs) – Key Findings

- The most widely tracked KPIs are **Occupancy Rate** (71,0%) and **Average Daily Rate (ADR)** (59,0%).
- These are followed by **Average Length of Stay (ALOS)** (41,4%), **Direct Booking Ratio (DBR)** (38,5%), and **Revenue per Available Room (RevPAR)** (36,8%).
- Significant usage is also observed for indicators such as **Customer Satisfaction Score (CSS)** (32,4%), **Total Gross Operating Profit (TGOP)** (32,0%), and **Labor Cost Ratio (LCR)** (29,1%).
- In contrast, sustainability and operational efficiency indicators such as **Revenue per Square Meter (RevPAM)** (1,7%), **Percentage of Renewable Energy Used** (9,4%), **Customer Acquisition Cost (CAC)** (7,6%), and **Staff Retention Rate (SRR)** (12,3%) are monitored far less frequently.
- The analysis shows that hotel businesses mainly focus on occupancy and revenue metrics, while less emphasis is placed on cost, customer satisfaction, and sustainability indicators.



Evaluation of Revenue Performance Compared to Competitors

QUESTION: How do you perceive your hotel's revenue performance compared to your competitors?



Most hotels (43,7%) believe that their revenue performance is roughly the same as that of their competitors.

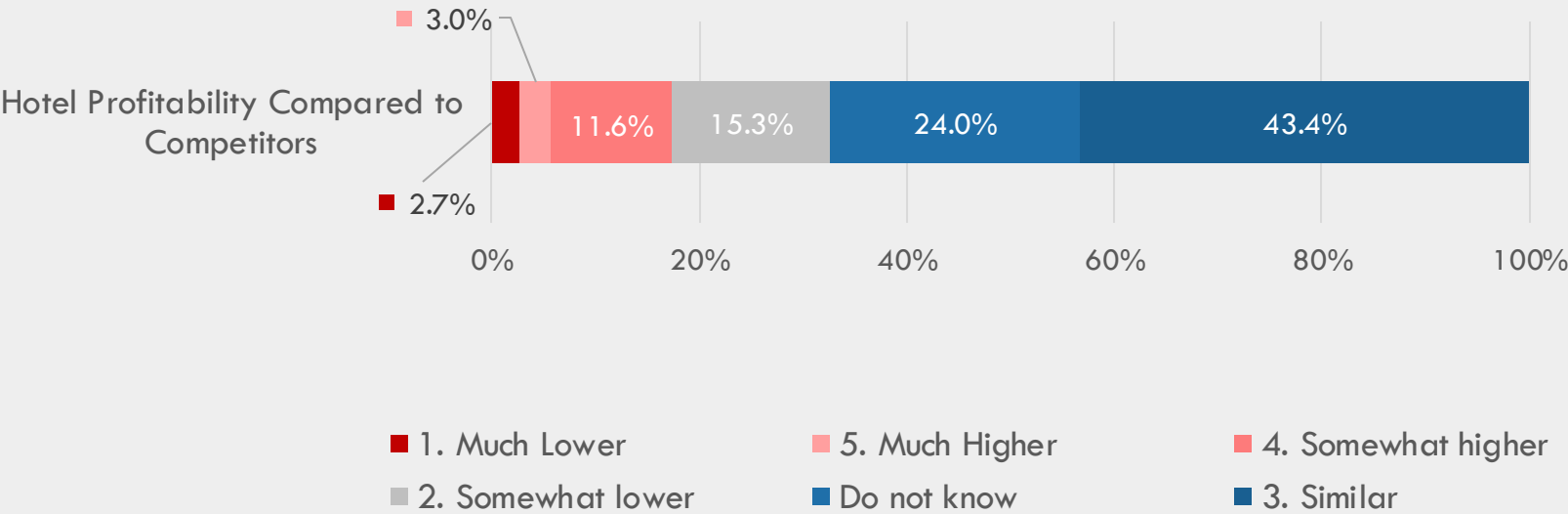
19% consider it **slightly better**, and 5,1% believe it is **significantly better**. On the other hand, 9% estimate **slightly worse** performance, while 1,7% rate it as **significantly worse**.

Overall, the findings indicate a cautious evaluation and limited confidence regarding their market position.



Evaluation of Hotel Profitability Compared to Competitors

QUESTION: How does your hotel's profitability compare to your competitors?



Most hoteliers (43,4%) believe their profitability is similar to that of their competitors.

15,3% estimate it to be **somewhat lower**, while 11,6% consider it **somewhat higher**.

Only 2,7% perceive it as **much lower**, and 3% as **much higher**.

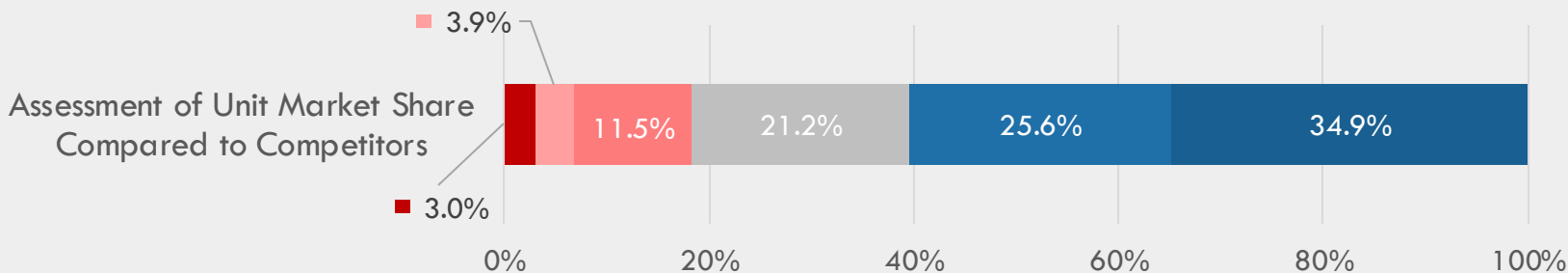
In summary, most hoteliers feel they perform at a comparable level to their competitors, although a significant share expresses uncertainty or a lack of information.



Evaluation of Unit Market Share Compared to Competitors

17

QUESTION: How do you assess your market share compared to your competitors?



- Losing market share significantly
- Slightly below average
- Slightly above average

- Leading in market share
- Do not know
- On par with competitors

34,9% hoteliers state that they hold a **similar market share**, while **25,6%** believe they are **slightly above average**.

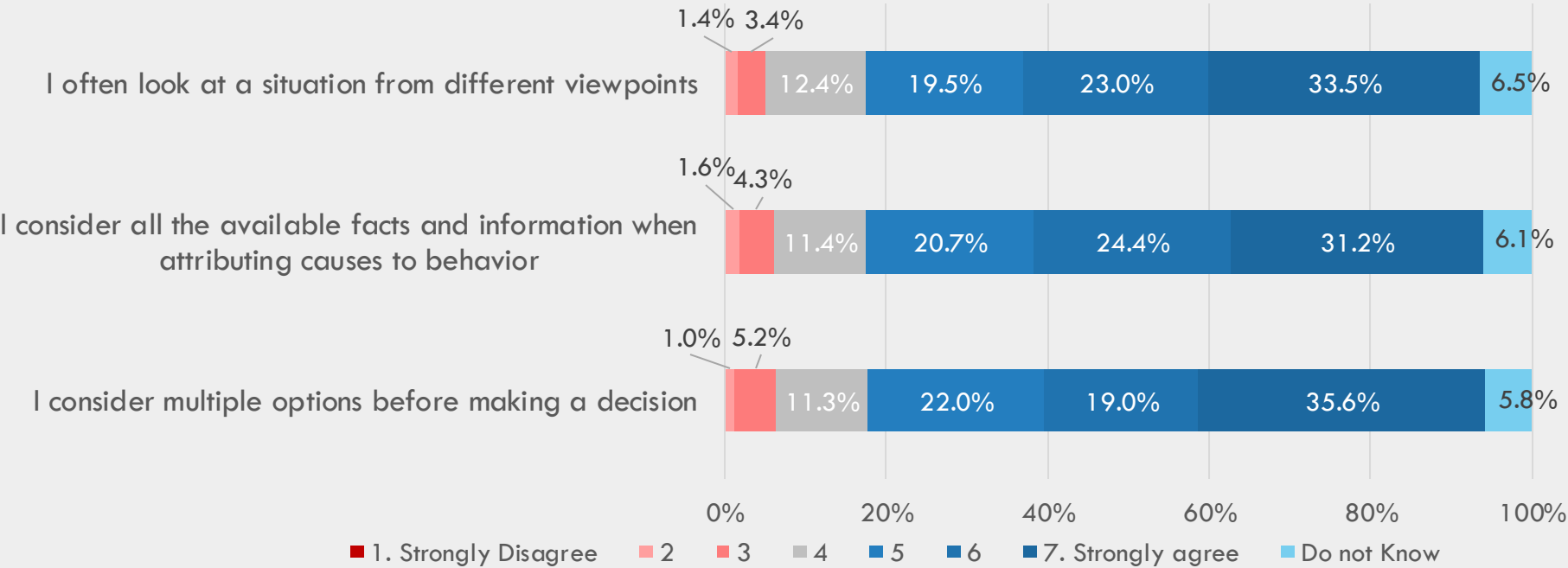
11,5% consider themselves **slightly below average**. **3,9%** see themselves as **market leaders**, while **3,0%** estimate they are **losing significant market share**.

In summary, most hotels position themselves **around or slightly above the average**, while only a few believe they significantly outperform or underperform their competitors.



Hoteliers' Decision-Making Approach

QUESTION: Please indicate the extent to which you agree or disagree with the following statements:





Hoteliers' Decision-Making Approach – Key Findings

Hoteliers were asked to indicate their level of agreement with three statements related to the decision-making process, using the following scale: ■ 1. Strongly Disagree ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7. Strongly agree ■ Do not Know

- For the statement **“I often look at a situation from different viewpoints,”** 33,5% of hoteliers responded with a score of 7, 23% with 6, 19,5% with 5, 12,4% with 4 (neutral), and 5,8% selected scores between 1 and 3. A further 6,5% did not respond.
- For the statement **“I consider all the available facts and information when attributing causes to behavior,”** 31,2% answered with 7, 24,4% with 6, 20,7% with 5, 11,4% with 4, and 7,3% selected scores from 1 to 3. Non-responses totaled 6,1%.
- For the statement **“I consider multiple options before making a decision,”** 35.6% selected 7, 19% chose 6, 22% gave a 5, 11,3% selected 4, and 7,2% gave scores from 1 to 3. Non-responses reached 5,8%.

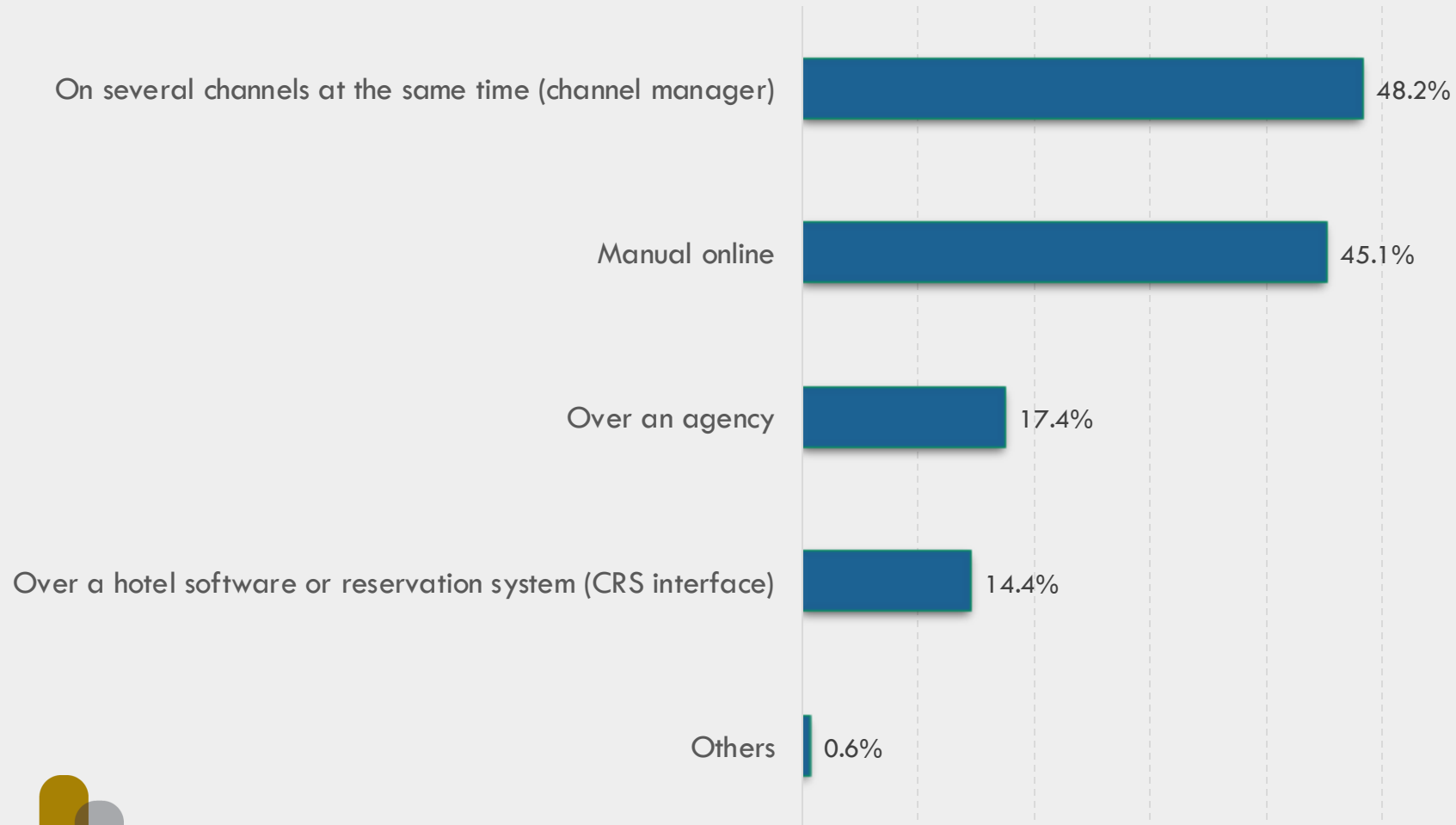
The results suggest that most hoteliers adopt an analytical and multi-dimensional decision-making approach.



Management of Prices & Availability on Online Booking Channels

20

QUESTION: How do you maintain your rates and availabilities on the online booking channels? *



Most hotels manage their prices and availability on online booking channels either through a **channel manager (48,2%)** or **manually online (45,1%)**.

Smaller percentages rely on **agencies (17,4%)** or **hotel software/CRS (14,4%)**.

The results indicate that, despite the use of modern tools, a significant share of hotels still use **non-automated methods**.

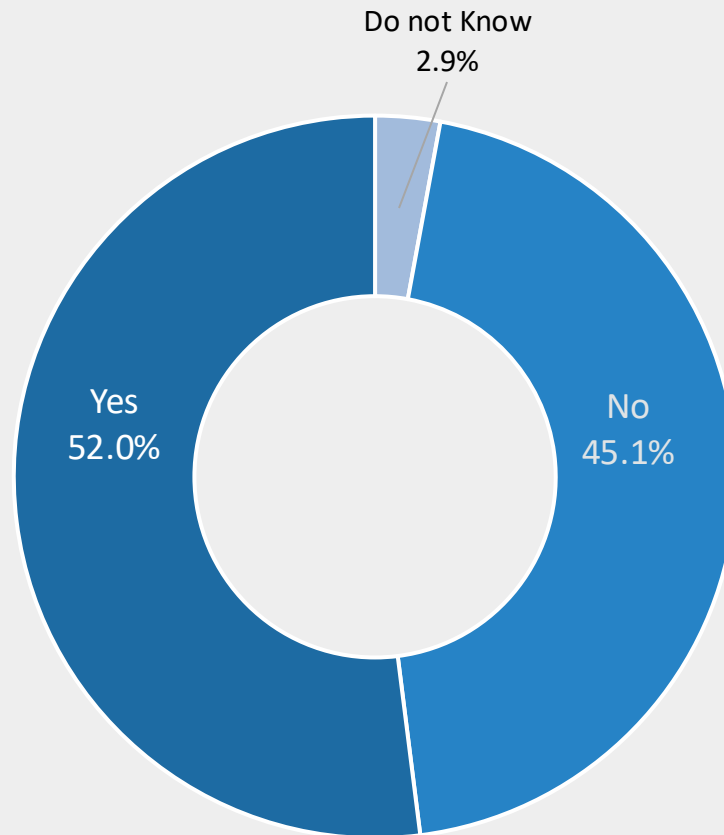
* Multiple Answers.



Hotels Using Property Management System (PMS) / Front Office System

21

QUESTION: *Do you work with a PMS (Property Management System) / Front Office system?*

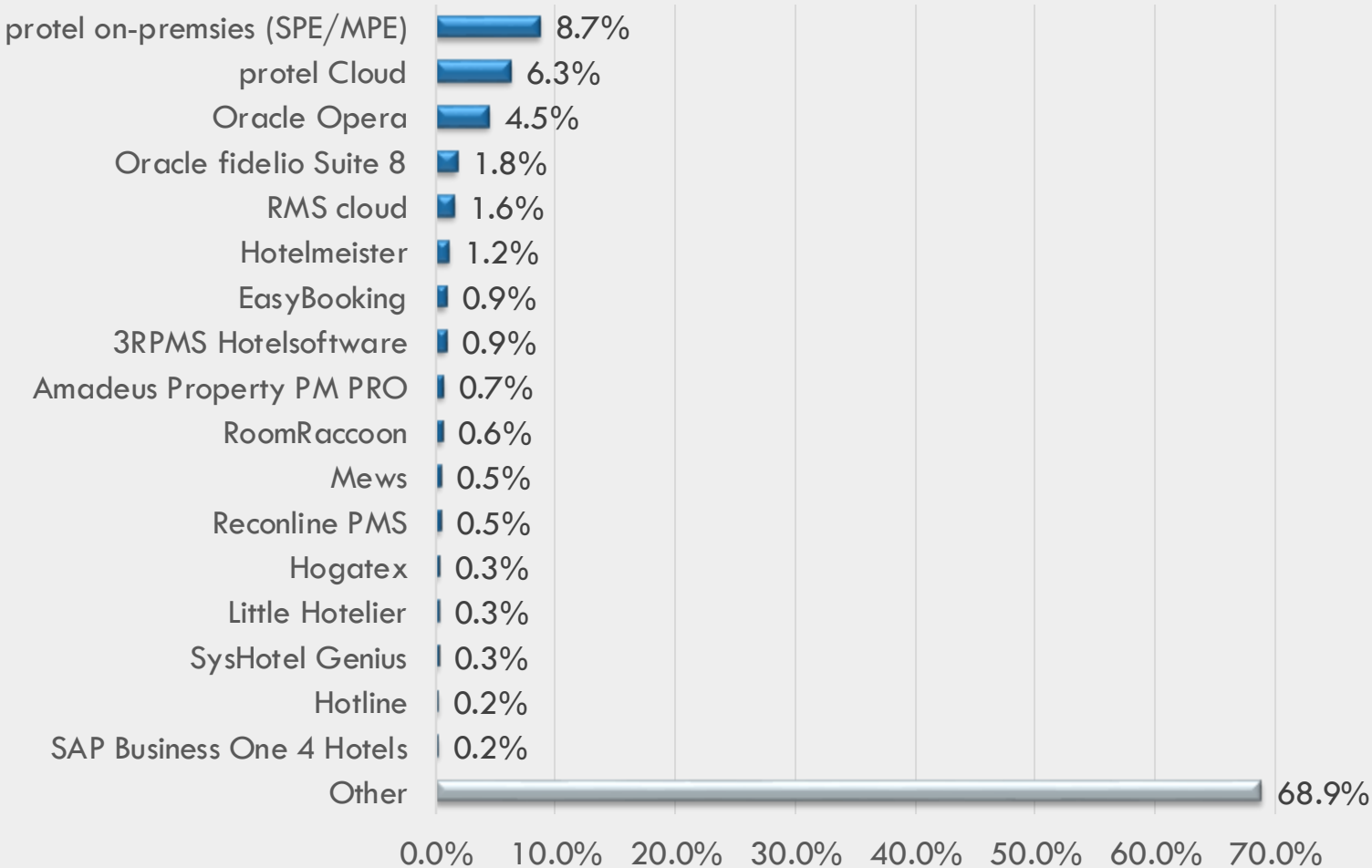


52,0%
reported using a **Property Management System (PMS)** or **Front Office System**.



Hotels Using Property Management System (PMS) / Front Office System

QUESTION: Which PMS/Front Office do you currently use? *



Among the **52,0% of hotels** that reported using a **Property Management System (PMS)** or **Front Office System**, a list of **89 PMS options** was provided.

68,9% of respondents indicated they use a **PMS not included in the list (Other PMS)**.

This was followed by **Protel on-premises (SPE/MPE)** with **8,7%**, **Protel Cloud** with **6,3%**, **Oracle Opera** with **4,5%**, and **Oracle Fidelio Suite 8** with **1,8%**.

All other systems accounted for **less than 2%** each.

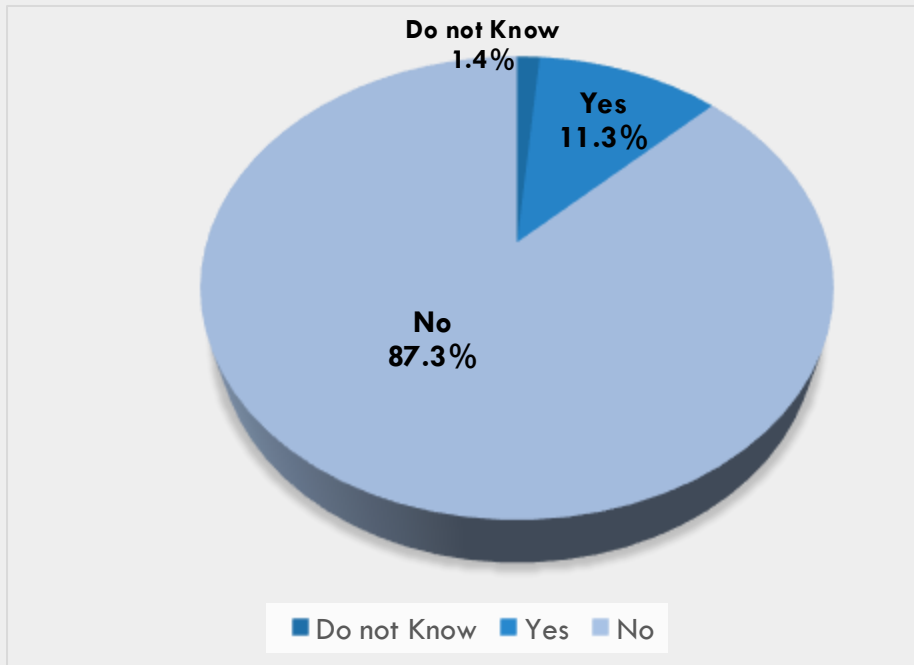
* Multiple Answers.



Hotels Planning to Change of Property Management System (PMS) / Front Office System

23

QUESTION: Do you plan to change your PMS within the next 24 months?

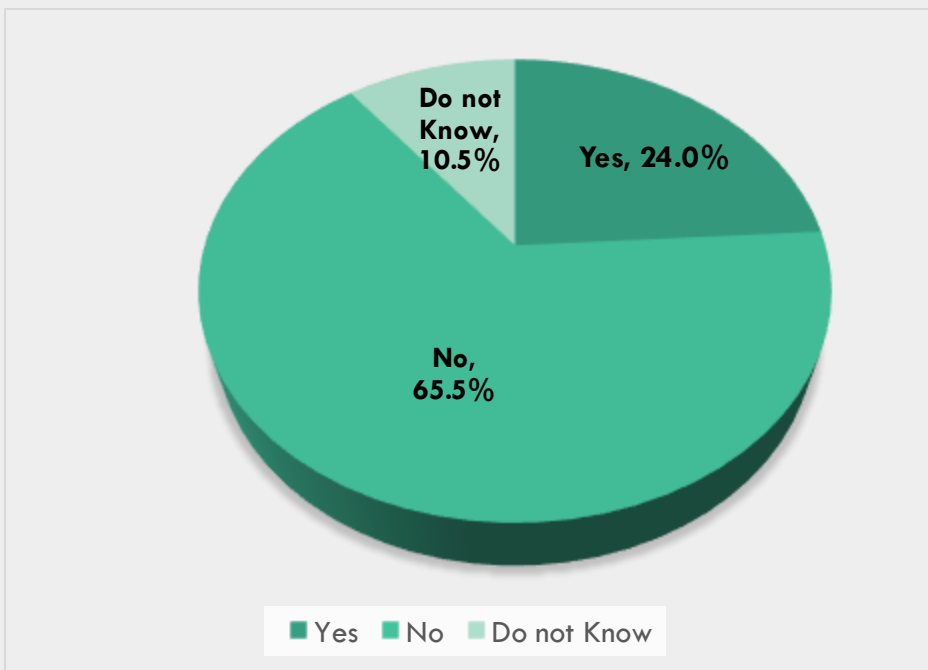


Among the **52,0% of hotels** that reported using a **Property Management System (PMS)**, **11,3%** plan to replace it with another system **within the next 24 months**.



Hotels Planning to Acquire of Property Management System (PMS) / Front Office System

QUESTION: Do you plan to acquire a PMS within the next 24 months?

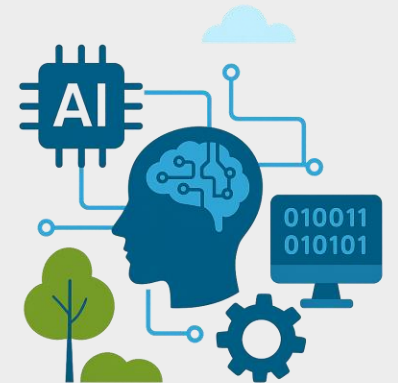


Among the **45,1%** of hotels that reported not using a **Property Management System (PMS)**, **24%** plan to acquire one **within the next 24 months**.



3

ARTIFIAL INTELLIGENCE- AI

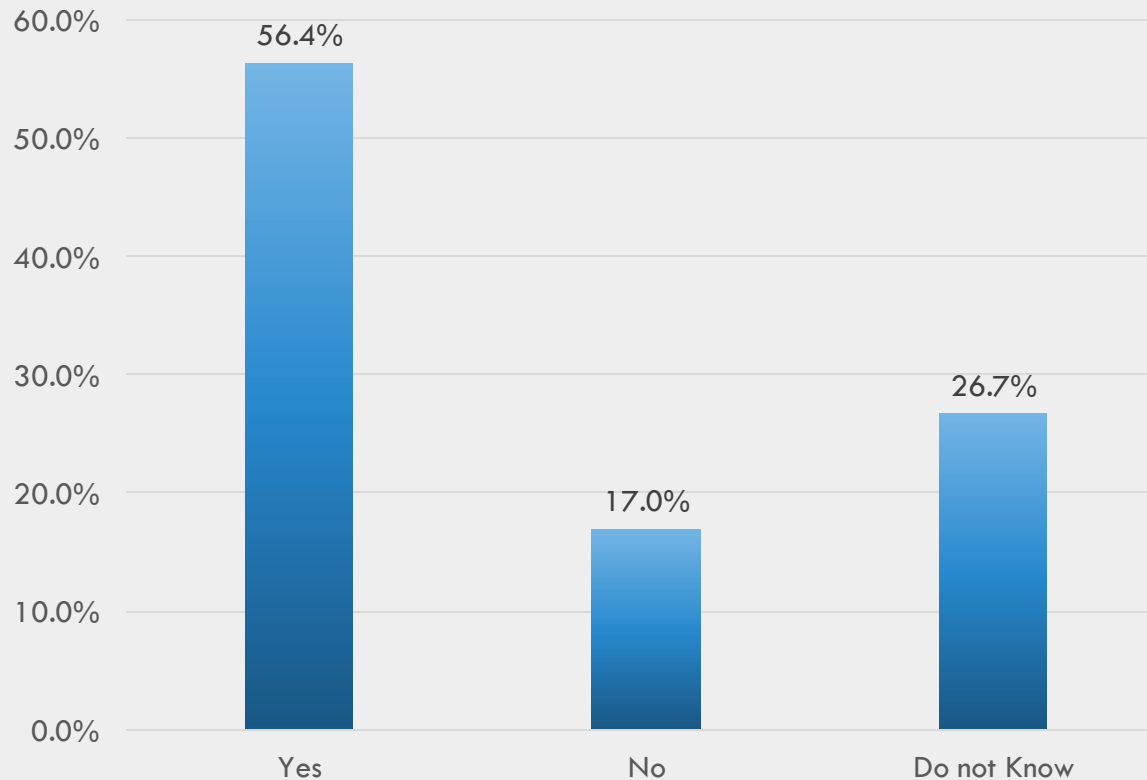




Hoteliers' Attitude Towards Artificial Intelligence (AI)

26

QUESTION: *Do you believe that Artificial Intelligence (AI) is relevant to you and your business operations?*



56,4% recognize the importance of **Artificial Intelligence (AI)** for their hotel, indicating growing awareness of the role AI can play in business development and innovation.

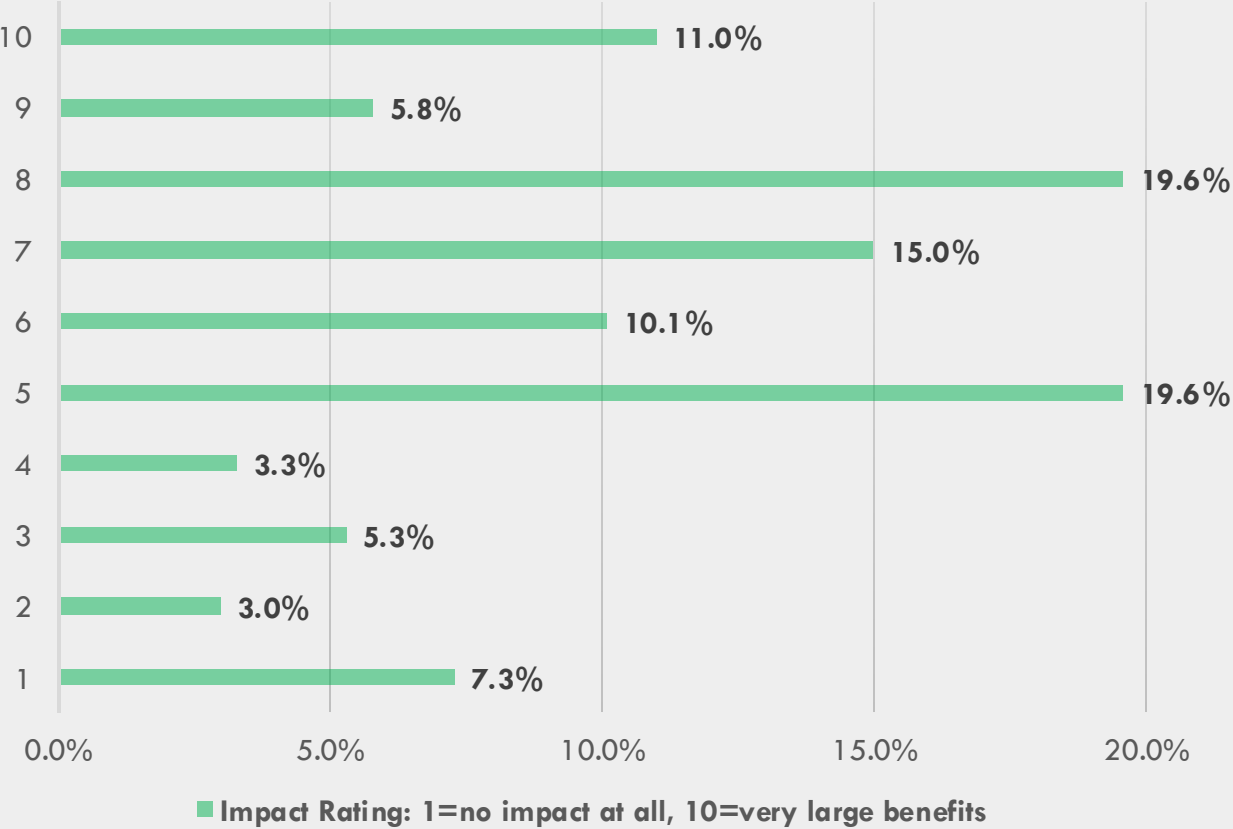
17% responded **“No”**, which may suggest a lack of full understanding of AI applications.

Notably, **26,7%** answered **“Don’t know,”** reflecting a significant portion of respondents who are uncertain or not sufficiently informed about AI.



Evaluation of the Impact of Artificial Intelligence (AI) Use

QUESTION: *On a scale of 1 to 10, how would you rate the impact of using AI for hotels in general?*



Most of responses are concentrated in positive evaluations: **19,6% of hoteliers gave a rating of 8**, and another **19,6% gave a rating of 5**.

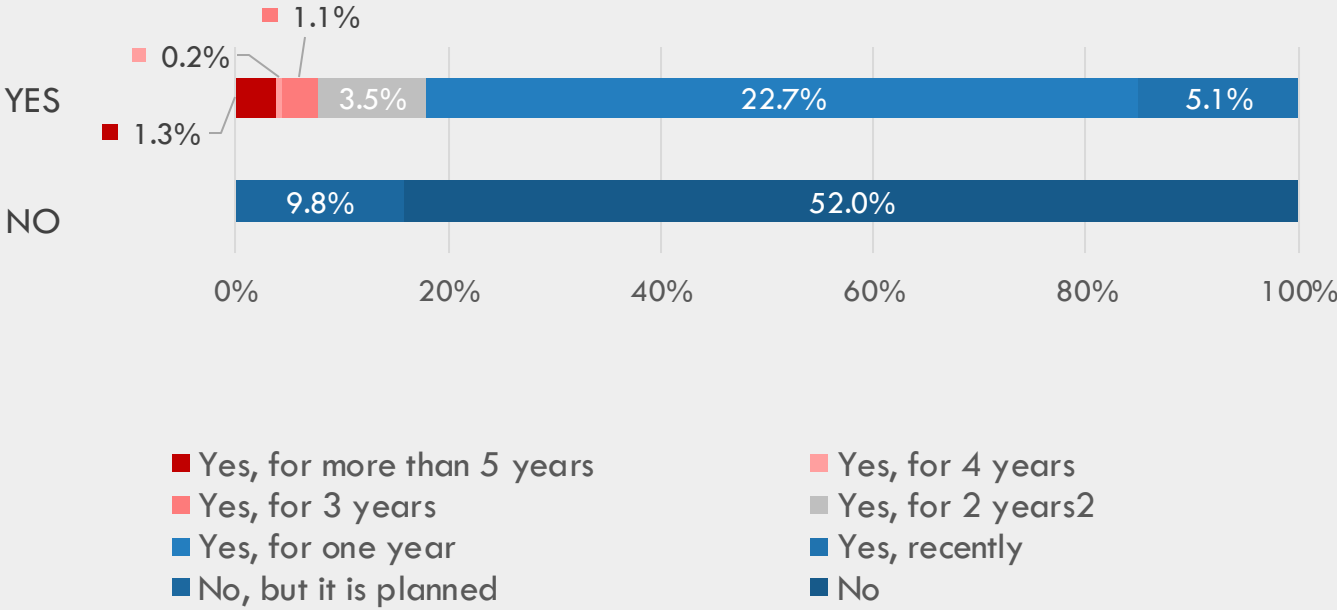
Overall, **ratings of 7-10 account for approximately 50% of responses**, indicating that many **consider AI to have a significant impact on the hotel sector**.

In contrast, low ratings (1-4) account for smaller percentages, suggesting a reduced negative attitude toward the use of AI in the Greek hotel industry.



Use of Artificial Intelligence (AI)

QUESTION: *Does your hotel use artificial intelligence (AI)?*



52% of hotels do not use artificial intelligence (AI), while 9,8% have planned its implementation.

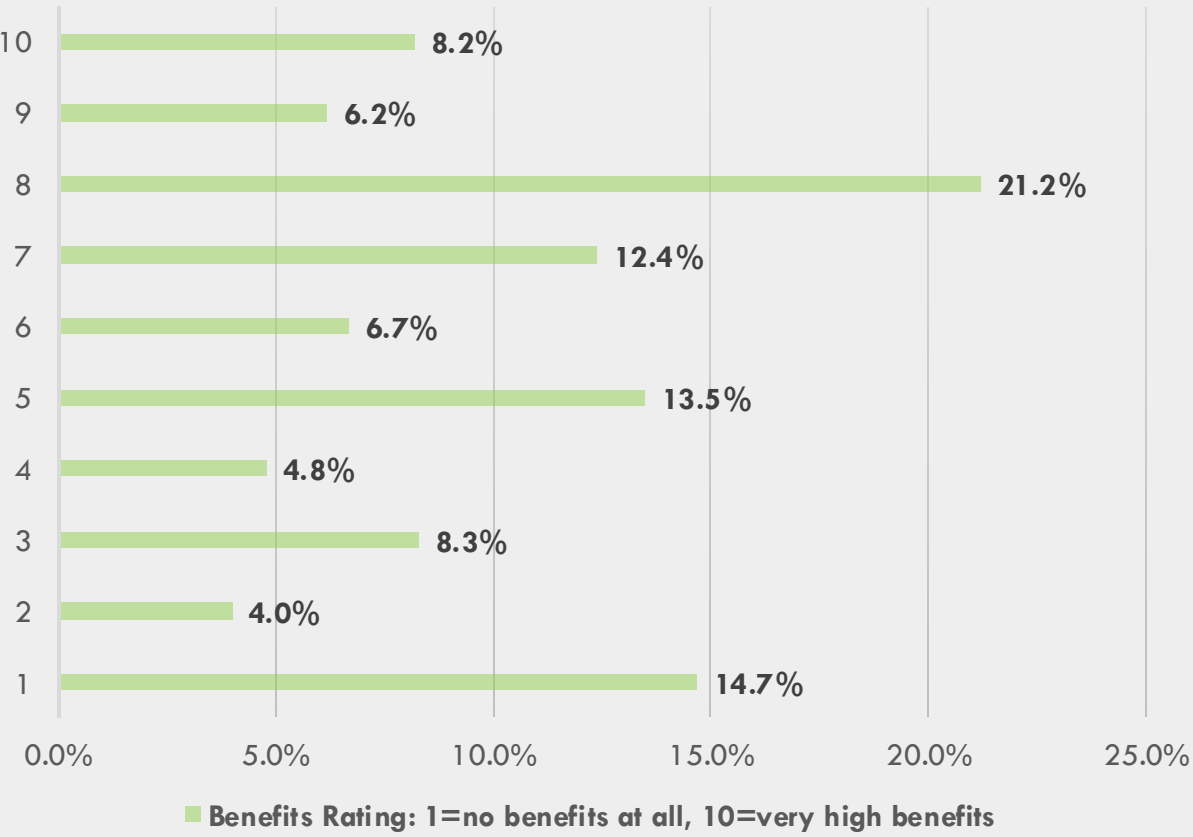
22,7% state that they have already been using it for 1 year, while 5,1% report that they started using it very recently.

Usage rates for longer periods (over 3 years) are extremely low, indicating that AI is still at an early stage of adoption in the hotel sector, although interest in its future use is increasing.



Evaluation of Benefits of Artificial Intelligence (AI) Use in the Hotel Unit

QUESTION: *If you use AI, how do you rate the benefits of AI for your hotel on a scale of 1 to 10?*

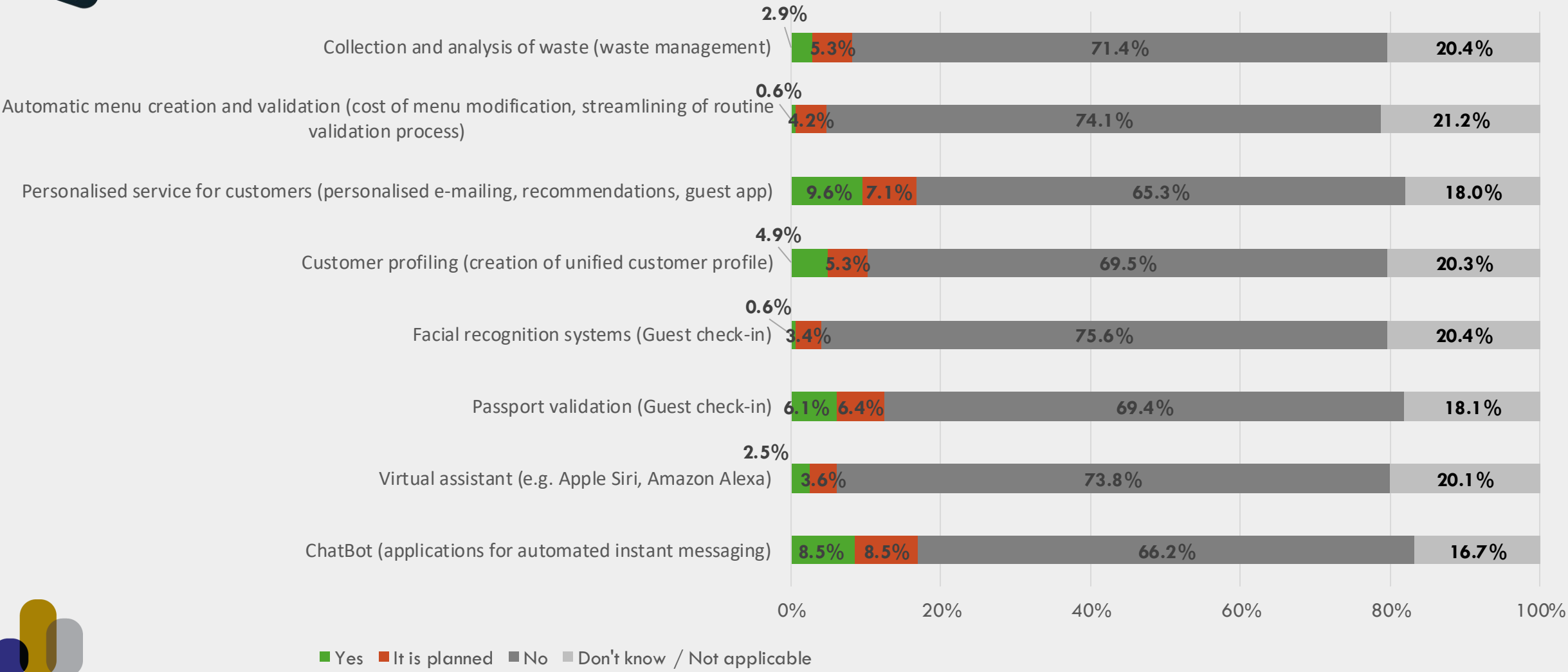


Most hoteliers evaluate the benefits of Artificial Intelligence positively, with **21,2% choosing a rating of 8** and **13,5% a rating of 5**. However, **14,7%** believe the benefits are negligible (**rating 1**), indicating that there are still reservations or a lack of awareness regarding its use in the sector.



Use of AI-Based or AI-Integrated Technologies – 1

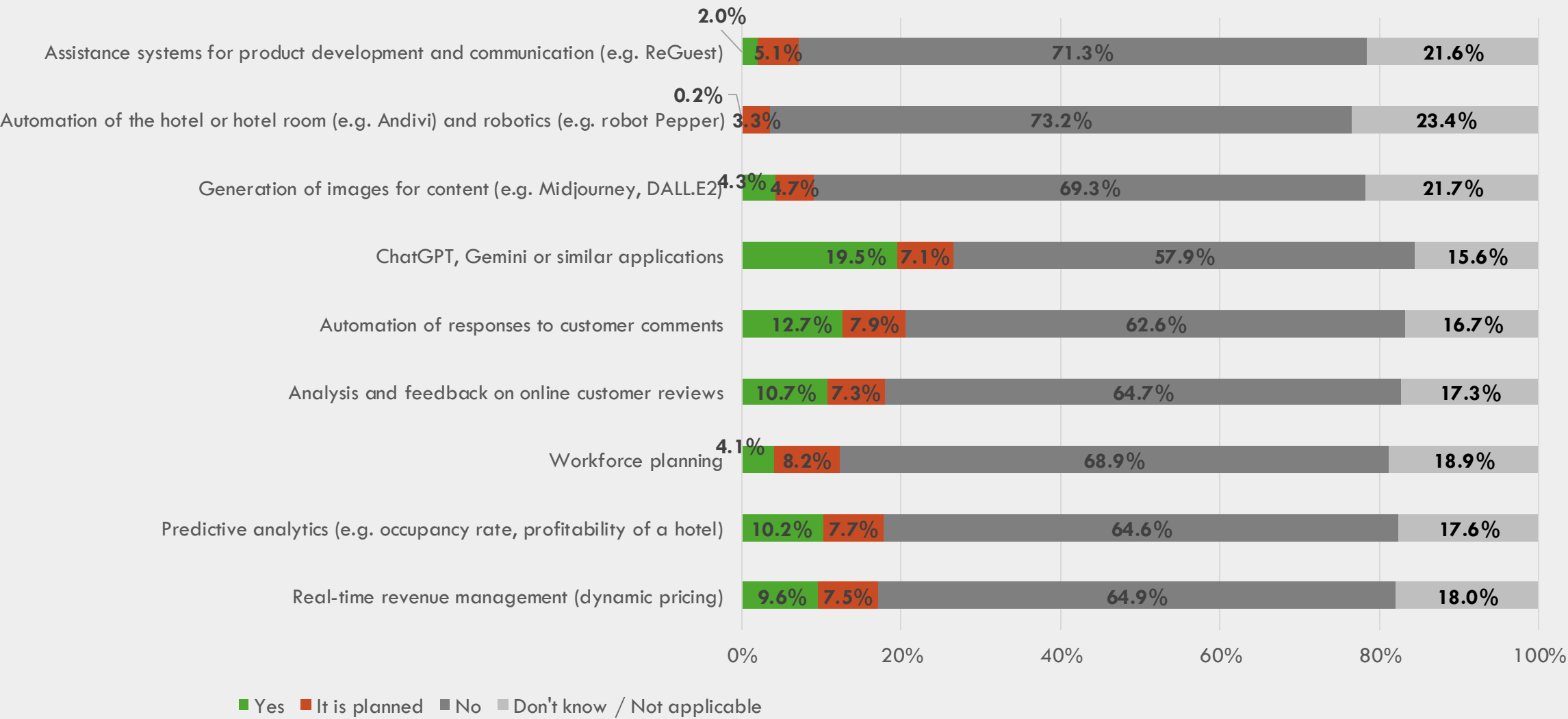
QUESTION: Does your hotel use technologies that incorporate or are based on artificial intelligence (AI)?





Use of AI-Based or AI-Integrated Technologies – 2

QUESTION: Does your hotel use technologies that incorporate or are based on artificial intelligence (AI)?





Use of AI-Based or AI-Integrated Technologies – Key Findings

32

Overall, **AI adoption rates remain low**, with most applications reporting **usage rates below 10%**—a result that is, however, rather expected given that **Artificial Intelligence is still in the early stages of adoption**.

Nevertheless, **a clear momentum is observed in specific categories**, particularly in AI tools that are **accessible, affordable, and easy to use**, such as **Chatbots** and **ChatGPT**.

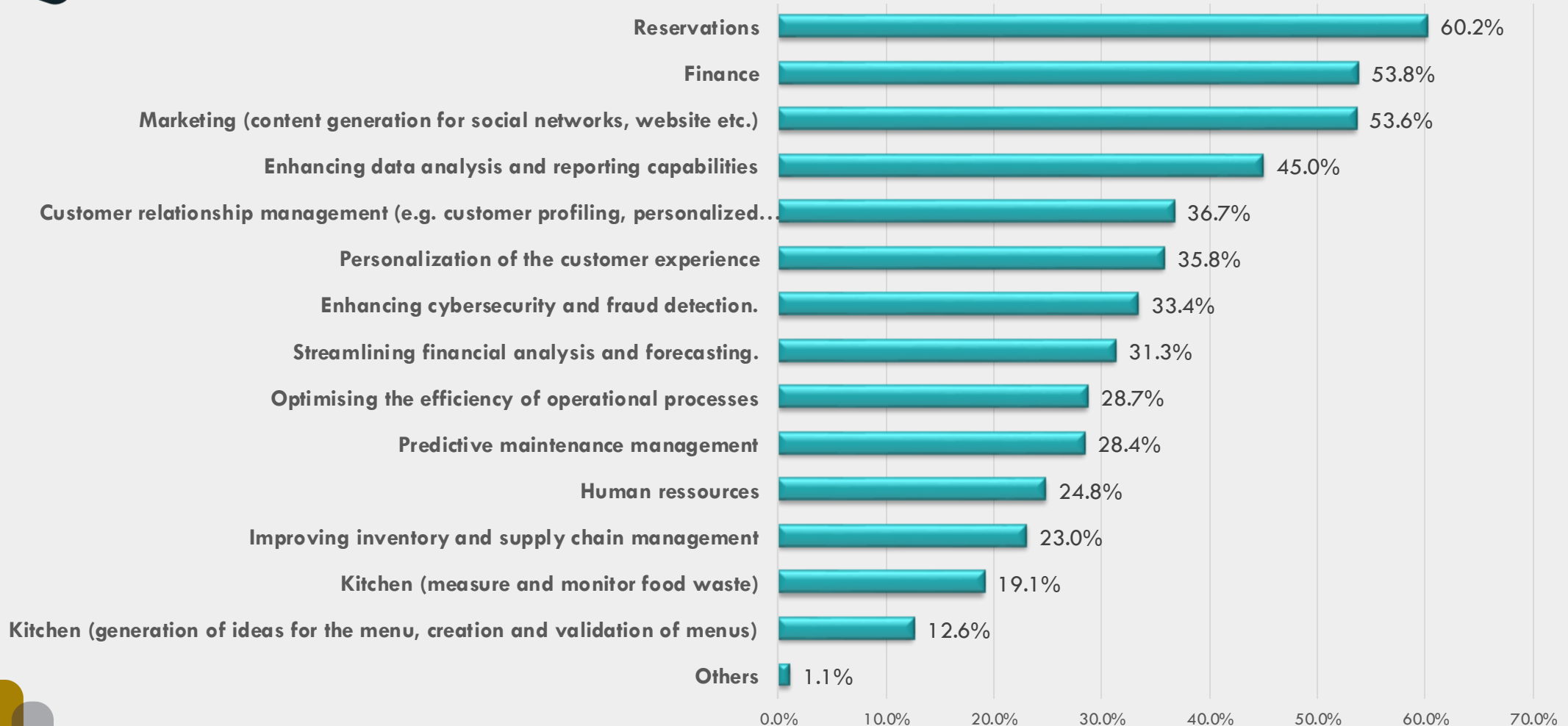
- **Dynamic pricing (9,6%)** and **personalised services (9,6%)** show the highest adoption rates, indicating that some hotels are moving toward personalised guest experiences and flexible pricing strategies.
- In contrast, applications such as **facial recognition, waste collection, and automatic menu creation** show **very low usage (0,6%–5%)**, either due to high costs or lack of sufficient information.
- **Chatbot** stands out with a **usage rate of 8,5%**, confirming its growing use for automating communication with guests.
- **ChatGPT and similar applications (e.g., Gemini)** record the **highest overall usage rate (19,5%)**, confirming that this is the most widely adopted AI solution in hotels.
- **Analysis and response to customer reviews** also show notable figures (**10,7%**), suggesting increased awareness around reputation and guest experience management.
- **Predictive analytics (10,2%)** is also gaining interest, indicating a trend toward leveraging data for strategic decision-making.
- On the other hand, technologies that require **greater investment**, such as **robotics (e.g., Pepper)** or **room automation**, show **low adoption (<3,5%)**.



Areas of AI Use in the Hospitality Sector: What Hoteliers Think

33

QUESTION: *In which areas do you think AI will be the most useful for hotels? **



* Multiple Answers.



Areas of AI Use in the Hospitality Sector: What Hoteliers Think – Key Findings ³⁴

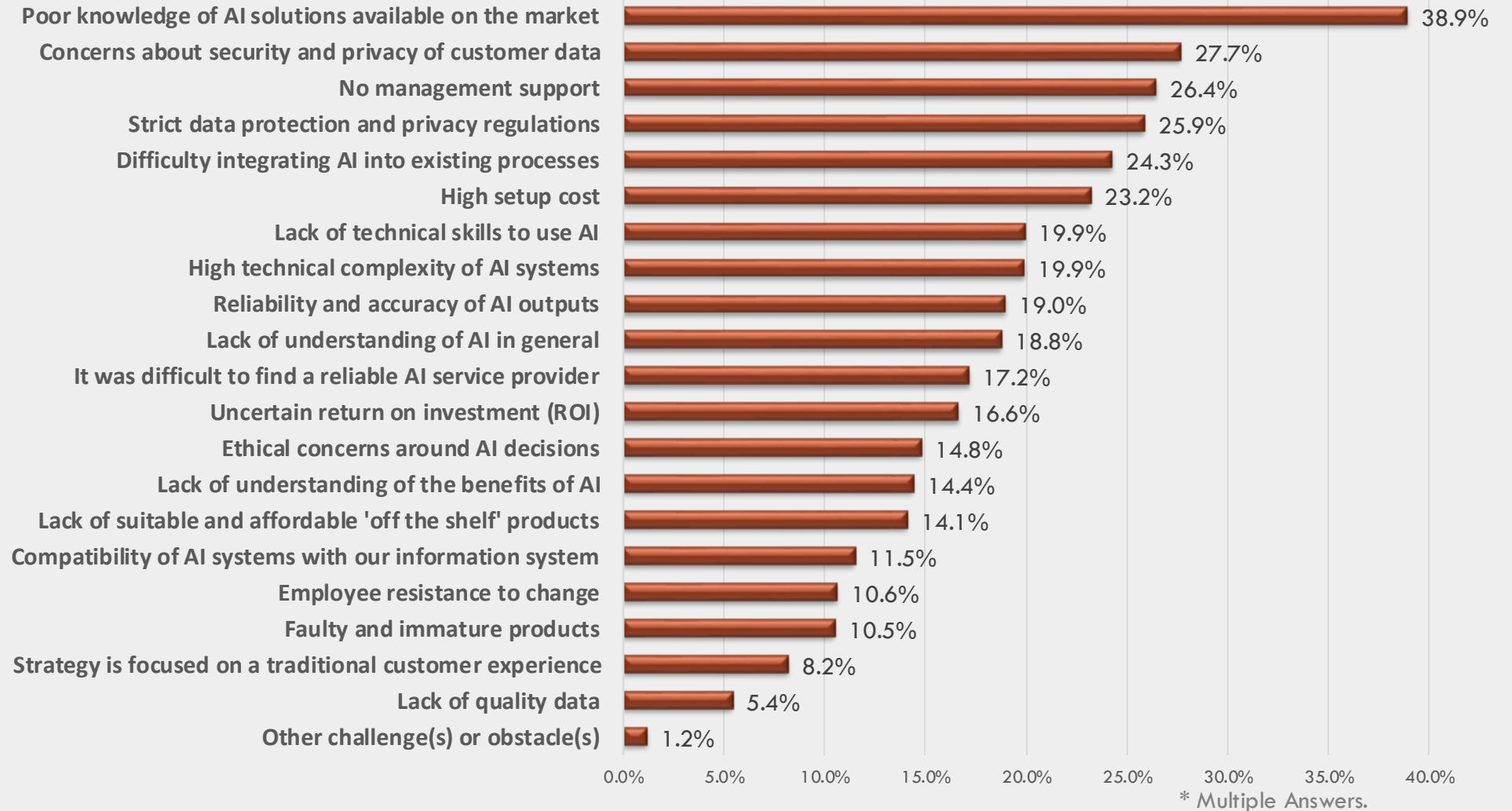
Hoteliers were asked to express their views on the areas where they consider **Artificial Intelligence to be useful in their sector**.

- **Reservations** were identified as the most important area for AI implementation, with **60.2%** of hoteliers selecting it. This reflects the emphasis on optimizing reservation systems to increase occupancy and revenue.
- **Finance (53.8%)** and **Marketing (53.6%)**—such as content creation for social media and websites—follow closely, indicating strong interest in AI's contribution to both revenue management and digital visibility.
- **Enhancing data analysis and reporting (45.0%)** also emerged as a key application area, highlighting the importance of data utilization for decision-making.
- Significant importance is also given to **Customer relationship management (36.7%)** and **Personalization of the customer experience (35.8%)**, indicating a shift toward more personalized and direct guest services.
- **Enhancing cybersecurity and fraud detection (33.4%)** and **Streamlining financial analysis and forecasting (31.3%)** were also notable, reflecting the need for security and more accurate planning.
- Moreover, there were strong mentions of **Optimizing the efficiency of operational processes (28.7%)**, **Predictive maintenance management (28.4%)**, and **Human resources (24.8%)**, indicating broad interest in increasing efficiency.
- Lower priority appears to be placed on **Improving inventory and supply chain management (23.0%)**, and AI applications in the **Kitchen**, such as **measuring and monitoring food waste (19.1%)** and **menu creation (12.6%)**.

Barriers to AI Adoption: What Hoteliers Think

35

QUESTION: *What specific challenges or obstacles have you encountered in integrating artificial intelligence into your hotel's operations, if you have already adopted it? If you have not yet adopted AI, what potential barriers do you perceive?**





Barriers to AI Adoption: What Hoteliers Think – Key Findings

36

Hoteliers were asked to share their views on the **barriers they perceive in adopting Artificial Intelligence (AI) technologies**. Their most common responses were:

- **Poor knowledge of AI solutions available on the market (38.9%):** The most frequently mentioned obstacle is the lack of awareness regarding the capabilities and solutions that AI offers. This highlights the need for education and information within the hospitality sector.
- **Concerns about security and privacy of customer data (27.7%):** Hoteliers are worried about data breaches or misuse of customer information, underscoring the importance of transparency and strict data protection policies.
- **No management support (26.4%):** There is hesitation or a lack of direction from management regarding such initiatives, reflecting organizational weakness.
- **Strict data protection and privacy regulations (25.9%) and Difficulty integrating AI into existing processes (24.3%):** Regulatory constraints and the complexity of incorporating AI into current workflows are also considered major obstacles.
- **High setup cost and High technical complexity of AI systems (23.2%–20%):** The financial investment and the need for specialized technical skills are viewed as significant deterrents.
- These are followed by **It was difficult to find a reliable AI service provider (17.2%)** and **Uncertain return on investment (ROI) (16.6%)**.

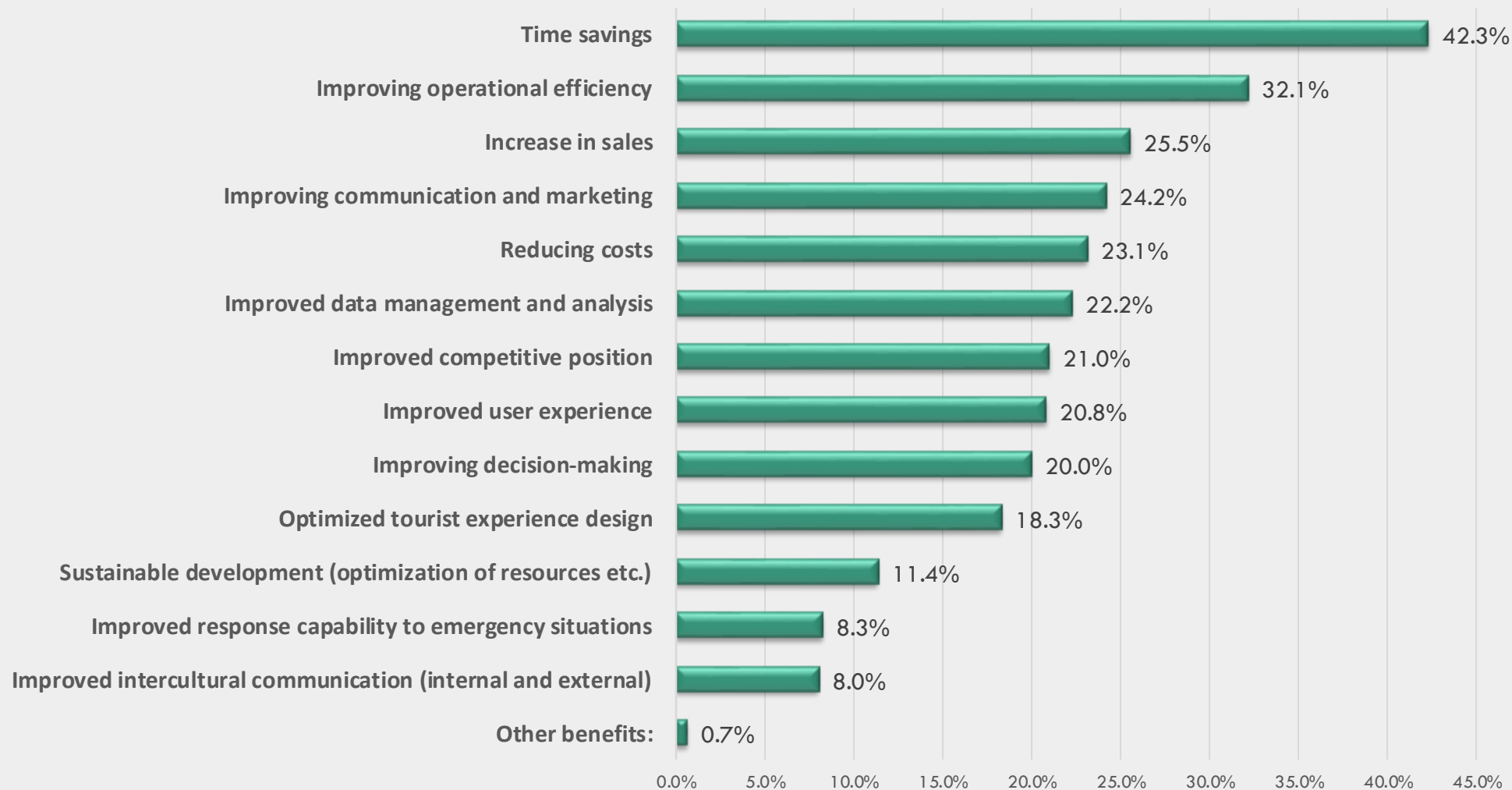
In conclusion, the barriers are not purely technological; they are also largely educational, organizational, and cultural. For AI adoption to succeed in the hotel sector, a combination of awareness, support, technical assistance, and strategic alignment is essential.



Benefits of AI Adoption: What Hoteliers Think

37

QUESTION: *What are the experienced or perceived benefits of introducing these technologies for a hotel?**



* Multiple Answers.



Benefits of AI Adoption: What Hoteliers Think – Key Findings

38

Hoteliers were asked about the **benefits of adopting Artificial Intelligence (AI) technologies**, based on their experience or perception. Their most common responses were:

- **Time savings (42.3%)**: The most significant benefit, highlighting AI's role in automating processes.
- **Improving operational efficiency (32.1%)**: Confirms that AI contributes to improving internal operations.
- **Increase in sales (25.5%)** and **Improving communication and marketing (24.2%)**: Indicate that hoteliers see AI as a tool to boost their commercial activities.
- **Reducing costs (23.1%)** and **Improved data management and analysis (22.2%)**: Reveal the economic and analytical value of AI.
- Fewer respondents mentioned **strategic or long-term benefits**, such as **sustainable development (11.4%)** or **improved response capability to emergency situations (8.3%)**.

In conclusion, **practicality** and **operational efficiency** are the core values that hoteliers appreciate in AI. There is still room for **awareness and training** regarding more strategic and long-term benefits, such as sustainable development or intercultural communication. AI adoption already appears to deliver tangible results in terms of **cost, time, and customer experience**, strengthening its overall acceptance in the hospitality sector.



Early Stage of AI Adoption

22,7% of hotels report that they **already use AI**, while **9,8%** intend to implement it. **52%** state they do not use it, indicating that AI is still at an early stage of penetration in the sector.

Positive Perception of AI Benefits

56,4% of hoteliers believe that AI is directly relevant to their business. **50%** evaluate its **impact on the hotel sector positively** (ratings 7–10).

Limited and Selective Use of AI Applications

The AI applications with the highest adoption are **ChatGPT (19,5%)**, **chatbots (8,5%)**, **analysis and response to customer reviews (10,7%)**, and **predictive analytics (10,2%)**. Technologies such as **facial recognition** and **automatic menu creation** show extremely low usage (**<5%**).



Areas with High AI Application Potential

60,2% of hoteliers believe that AI is particularly **useful in reservations**, **53,8%** in **financial management**, and **53,6%** in **marketing**. These are followed by **data analysis (45%)**, **customer relationship management (36,7%)**, and **cybersecurity (33,4%)**.

Key Benefits of Using AI

42,3% recognize **time savings**, **32,1%** cite **improving operational efficiency**, **25,5%** report an **increase in sales**, and **24,2%** mention **improved communication/marketing**. **Reducing costs** is reported by **23,1%**.

Barriers to Adoption

38,9% report **poor knowledge of AI solutions available on the market**, **27,7%** cite **concerns about security and privacy of customer data**, **26,4%** report **no management support**, and **25,9%** refer to **strict data protection and privacy regulations**. **High setup cost (23,2%)** and **high technical complexity of AI systems (20%)** are also considered limiting factors.



Training and Awareness for Hoteliers

Development of training programs on Artificial Intelligence, with an emphasis on practical applications, costs, benefits, and best practices. This would address the information need reported by 38,9% of businesses.

Promoting Digital Transformation through Incentives

Provision of financial incentives (e.g., subsidies or tax exemptions) for the acquisition and implementation of AI solutions, especially for small and medium-sized enterprises.

Ensuring Data Protection

Development and promotion of standards and guidelines for the secure integration of AI in accordance with GDPR, aiming to reduce privacy concerns (27,7%).



Development of Open-Access Platforms with AI Tools

Creation of accessible digital hubs for the use of AI tools (such as chatbots, comment analysis, dynamic pricing), supported by public authorities.

Pilot Programs in Selected Areas

Implementation of pilot AI projects in high-tourism areas with the aim of documenting best practices and disseminating know-how.

Strengthening Research and Innovation in Tourism

Funding of collaborative research projects between universities, tech companies, and tourism enterprises to develop customized AI solutions.



ΙΝΣΤΙΤΟΥΤΟ ΤΟΥΡΙΣΤΙΚΩΝ ΕΡΕΥΝΩΝ ΚΑΙ ΠΡΟΒΛΕΨΕΩΝ
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