Digital Distribution and Revenue Management in European Hotels

Results of an online survey among hotels in Austria, France, Germany, Greece, Italy and Switzerland

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> **Executive Summary**

Executive Summary (I)

- The goal of this study is to assess the **current state of distribution and revenue management practices in the European hotel sector**. It focuses on tools, strategies, and performance indicators used to optimize sales, enhance profitability, and strengthen competitiveness in a digital marketplace.

- The survey collected **responses from over 1,500 hotels across six countries** (Austria, Germany, France, Greece, Italy, and Switzerland). The sample reflects a broad diversity of hotel sizes, classifications, and locations. The questionnaire examined the use of Property Management Systems (PMS), Revenue Management Systems (RMS), channel managers, and key KPIs such as RevPAR, ADR, occupancy, and direct booking ratios.

- The study was conducted under the Resilient Tourism initiative, an Innosuisse-supported national R&D program aimed at fostering data-driven and digitally enabled innovation within the Swiss tourism sector.

Executive Summary (II)

Tool Usage and Technological Readiness

- 75% of hotels use a PMS, and 63% use a channel manager. However, only 44% apply a revenue management strategy, and RMS adoption remains limited. Fragmentation is high, with over 70 PMS solutions in use, reflecting low standardization and integration challenges.

KPI Tracking Remains Basic

- Most hotels track occupancy, ADR, and RevPAR, but strategic and sustainability KPIs (e.g., EBITDA margin, staff retention, energy consumption) are underutilized. This reveals an operational maturity gap, where foundational systems exist, but performance management is still narrow. This suggests that performance evaluation in many hotels remains primarily focused on room revenue rather than overall profitability.

- While KPI usage remains basic overall, some hotel segments—especially larger and 4- to 5-star hotels located in big cities—demonstrate higher adoption of advanced metrics such as NetADR, GOPPAR, and RevPOR. This indicates that strategic performance monitoring is concentrated in more professionally managed establishments, highlighting a divide in analytical capabilities across the sector.

Executive Summary (III)

Competitive Awareness Is Limited

- Many hotels cannot assess their revenue or market share compared to competitors, pointing to a lack of benchmarking tools and external data access. This undermines strategic positioning and pricing agility. The most analytically oriented decision-makers—those who strongly agree with evaluating multiple options and viewpoints—are predominantly found in urban and in 4- and 5-star hotels.

Mindset–Execution Gap

- Respondents report reflective and analytical decision-making mindsets, yet data use and system integration lag behind. This suggests an openness to digital transformation, but also the need for capacity-building.

Strategic Opportunity

- The findings point to a strong case for targeted support in digital adoption, revenue strategy implementation, and KPI literacy, particularly for independent and SME hotels. Strengthening these areas will enhance resilience and competitiveness in a rapidly evolving digital distribution environment. To better leverage the analytical capabilities of AI, it would be beneficial for hotels to integrate data from disparate systems into a more unified dataset. Strengthening both data consolidation and analytical literacy can help generate deeper insights and support more informed, forward-looking decision-making over time.

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> **The Survey**

The survey: Background (I)

- In today's rapidly evolving technological landscape, the tourism sector—particularly the hotel industry—is undergoing profound transformation. As businesses strive to enhance operational efficiency, optimize sales, and improve customer experience, digital tools and data-driven strategies have become essential. Among these, **Artificial Intelligence** (AI) is emerging as a powerful enabler of innovation, especially in areas such as customer service automation, dynamic pricing, and demand forecasting.

- At the same time, effective **distribution** and **revenue management** remain critical levers for competitiveness, requiring hotels to navigate increasingly complex ecosystems of online travel agencies (OTAs), direct booking channels, and performance analytics. However, the adoption of such technologies is not without challenges—especially for Small and Medium-sized Enterprises (SMEs), which often lack the financial, technical, and human resources available to larger hotel groups (Dredge et al., 2018; OECD, 2021).

- This **study seeks to better understand how hotels across Europe are responding to these dual imperatives: mastering digital distribution and embracing AI-based innovation**.

The survey: Background (II)

- The results of the study are presented in **two separate reports** to allow for a more focused analysis of key thematic areas.

  - **This present report specifically covers hotel distribution and revenue management practices**, examining the tools, strategies, and performance metrics used by hotels to manage sales channels and optimize financial outcomes.

  - A **second report** addresses the **adoption, use cases, and perceived impacts of artificial intelligence** (AI) technologies in the hotel sector.

- The study was conducted by HES-SO Valais together with EHL within the framework of the **Resilient Tourism** project. The Resilient Tourism Flagship (www.resilienttourism.ch), supported by **Innosuisse**, aims to promote the datafication of Switzerland's tourism and travel sector, fostering the development of resilient, digitally-supported services, processes, and business models. The programme is led by six research institutes in collaboration with more than 30 Swiss tourism industry partners.

Methodology: Questionnaire (I)

- We opted for an **online survey** as our primary data collection tool to gather insights into the current landscape of the hotel sector. This method allowed us to efficiently reach a wide range of participants within the industry, ensuring a comprehensive understanding of the prevailing trends, challenges, and opportunities related to technology adoption.

- The overall questionnaire (see Annex 1), comprising 56 questions, was developed based on a comprehensive literature review, expert interviews, feedback from hoteliers, and input from national hotel associations. Approximately half of the questions focused specifically **revenue management strategies and related technological practices**.

- This **sub-report** concentrates on these latter aspects, providing an analysis of how hotels manage their distribution mix, adopt digital sales tools, and monitor key performance indicators to optimize profitability and competitiveness. The questionnaire for the distribution part was structured into several thematic sections:

  - **General Information about the Hotel**
    This section gathers demographic and operational data (e.g. country, hotel size, classification, customer segment) to enable comparative analysis based on structural characteristics and geographic location.

  - **Distribution and Sales Strategies**
    This section explores the use of tools such as Property Management Systems (PMS), Channel Managers, and Central Reservation Systems (CRS), as well as methods used to maintain rates and availability across booking channels.

Methodology: Questionnaire (II)

- **Revenue Management Practices**
  Questions in this section assess whether hotels use formal revenue management strategies, what tools support decision-making (e.g. RMS, spreadsheets, consultants), and which key performance indicators (KPIs) are actively tracked.

- **Market Positioning and Strategic Behavior**
  Hoteliers were also asked to self-assess their competitive position in terms of revenue, profitability, and market share, as well as to indicate their decision-making orientation through cognitive style statements.

Methodology: Survey Administration

- The questionnaire was translated in 5 languages : French, German, English, Italian and Greek.
- The survey was addressed **between January to April 2025** to the member hotels of six different hotel associations:
  - WKÖ in Austria
  - IHA in Germany
  - UMIH in France
  - Research Institute for Tourism (RIT) for the Hellenic Chamber of Hotels in Greece
  - Associazione Albergatori ed Imprese Turistiche della Provincia di Trento in Italy
  - HotellerieSuisse in Switzerland

- The different hotel associations contacted their members either by email or through newsletters. In Greece, the survey was conducted independently by RIT.
- As not all hotels replied to all questions, the number of responses can vary from one to another question.

> **The Sample**

Sample: Country
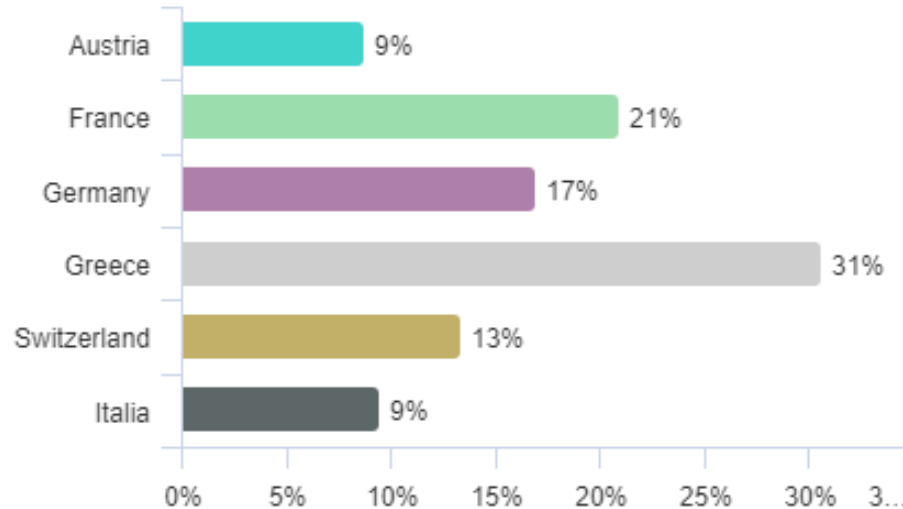
In which country is your hotel located?

Effective responses: 1,485
Response rate: 99%

The sample includes responses from 1,485 hotels, with a notably high proportion from Greece (31%), which may influence aggregate results. France (21%), Germany (17%), and Switzerland (13%) are also well represented, while Austria and Italy each contribute 9%, ensuring a broad geographic coverage across the six countries.

Sample: Location

What is the location of your hotel?

Effective responses: 1,483   Response rate: 99%
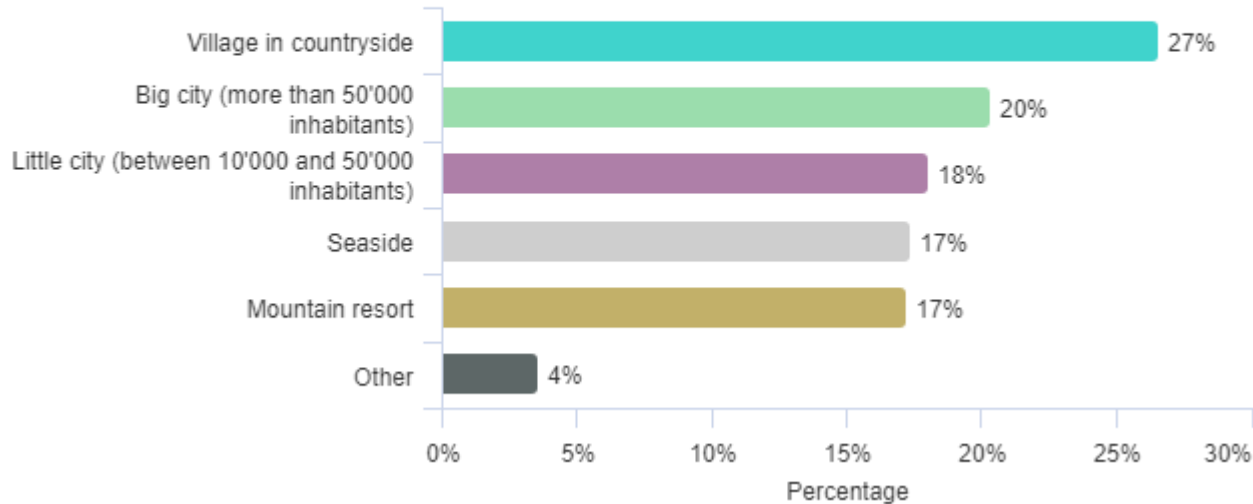
The sample reflects a wide variety of hotel locations, with the largest share situated in villages in the countryside (27%), followed by big cities (20%) and small cities (18%). Seaside and mountain resort hotels each represent 17% of the sample, indicating a balanced representation across urban, rural, and touristic areas.
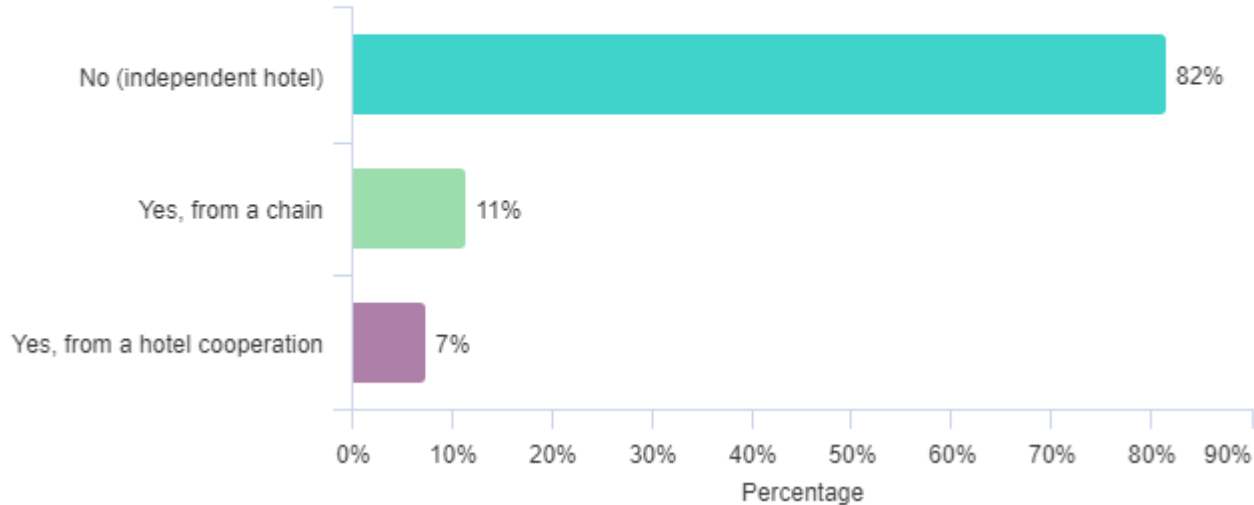
Sample: Type of Hotel

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

Effective responses: 1,465   *Response rate: 98%*

No (independent hotel) — 82%

Yes, from a chain — 11%

Yes, from a hotel cooperation — 7%

Percentage

The sample is largely composed of independent hotels, which make up 82% of respondents. Only 11% are affiliated with a hotel chain and 7% with a hotel cooperation, reflecting the dominant role of small and medium-sized enterprises (SMEs) in the sector.

Sample: Customer Segments

What is your main customer segment?

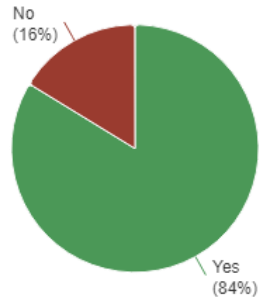Effective responses: 1,475   Response rate: 99%
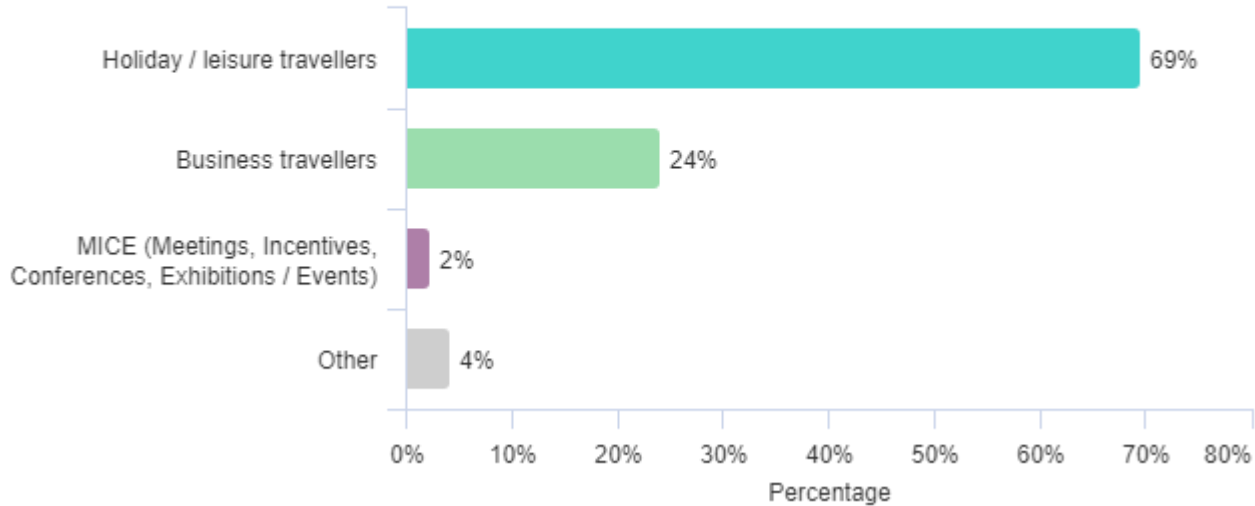
The vast majority of surveyed hotels (69%) primarily serve holiday and leisure travellers, while 24% focus on business travellers. MICE guests account for only 2%, highlighting the predominantly leisure-oriented nature of the sample.

Sample: Classification

Is your hotel officially classified (star category)?

Effective responses: 1,346   Response rate: 90%

No (16%)

Yes (84%)

If yes, what is the star rating of your hotel?

Effective responses: 1,125   Response rate: 75%

- 1: 4%
- 2: 16%
- 3: 42%
- 4: 30%
- 5: 7%
- Autre: 2%

Percentage
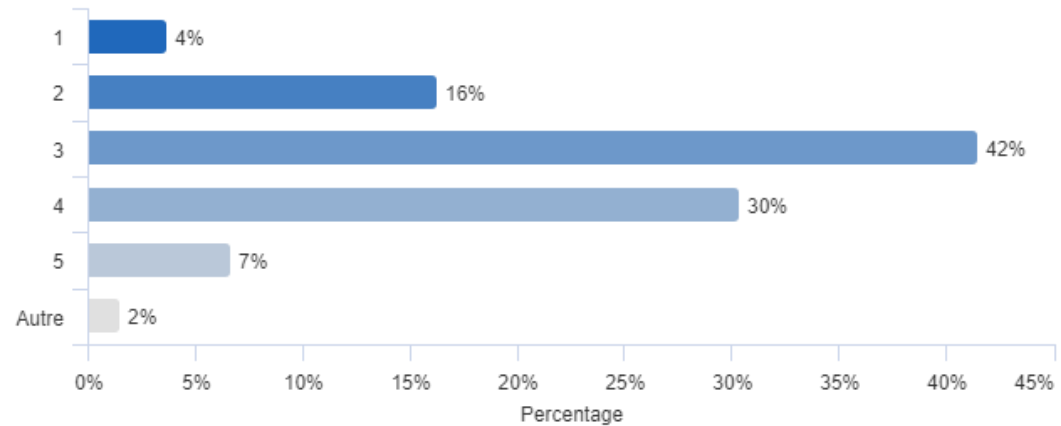
A large majority of the surveyed hotels (84%) are officially classified by star category. Among them, most fall into the mid-range segment, with 3-star (42%) and 4-star (30%) hotels dominating the sample, while 5-star properties represent 7%.

Sample: Size of Hotels (Nbe of Rooms)

How many rooms does your hotel have?

Effective responses: 1,432

Mean: 53.1

Min - Max: 5.0 - 2,510.0

Response rate: 96%

Median: 31.0
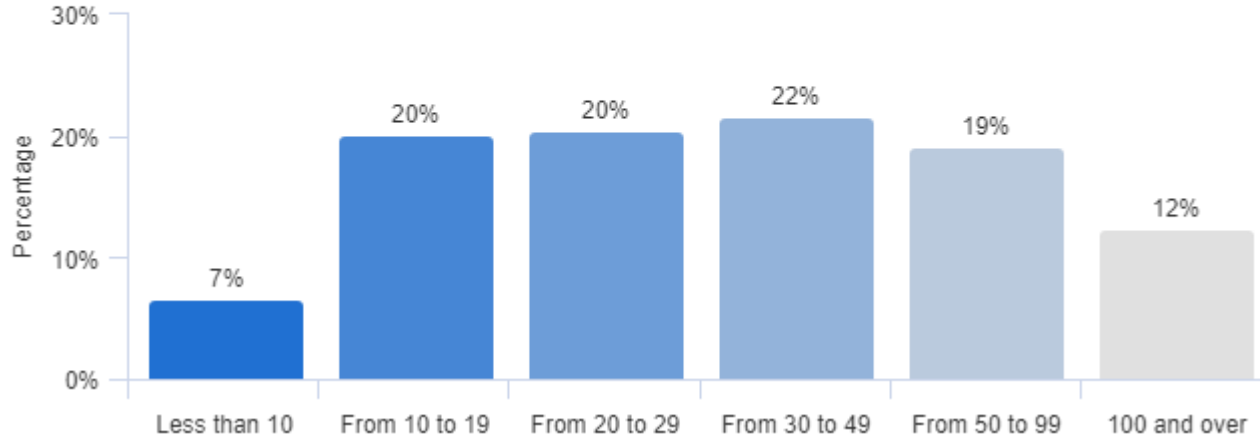

The sample is largely composed of small and mid-sized hotels, with a median of 31 rooms and an average of 53.1. Most properties (81%) have fewer than 100 rooms, reflecting the SME structure of the sector, while only 12% of respondents operate larger hotels with 100 rooms or more.

Sample: Size of Hotels (Number of Employees)

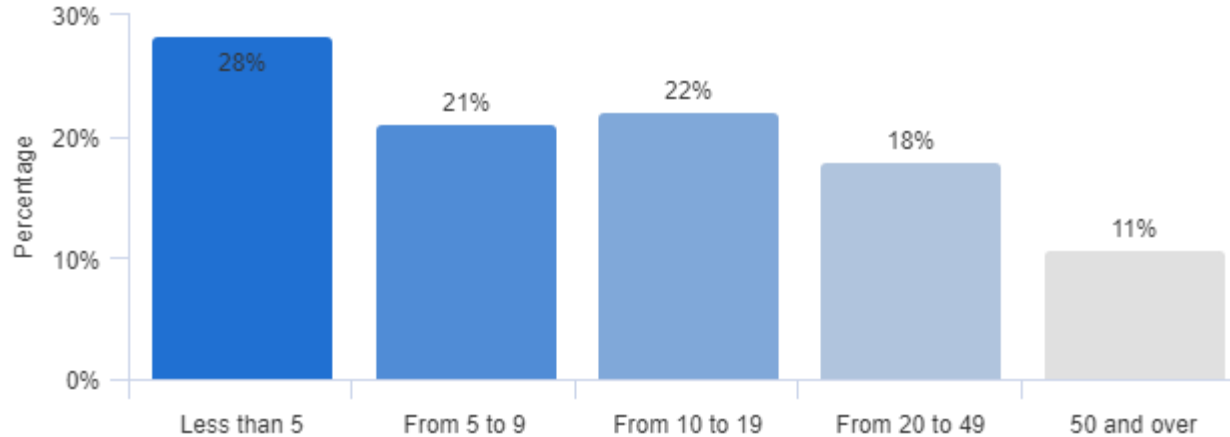How many people work in your hotel (average number of full-time employees)?

Effective responses: 1,445
Mean: 23.0
Min - Max: 0.5 - 740.0

Response rate: 97%
Median: 10.0

The sample predominantly consists of small-scale operations, with a median of 10 full-time employees and an average of 23. Nearly half of the hotels (49%) employ fewer than 10 people, confirming the strong presence of SMEs in the respondent base.

Summary of Overall Sample Characteristics

A breakdown of the responses reveals:

- ➢ **Country Distribution:** The sample spans six countries, with the largest share of responses from Greece (31%), followed by France (21%), Germany (17%), Switzerland (13%), Austria (9%), and Italy (9%).
- ➢ **Hotel Location**: Most hotels were located in rural villages (27%), followed by large cities (20%), small cities (18%), and seaside or mountain resorts (17% each).
- ➢ **Hotel Type**: The vast majority were independent hotels (82%), with 11% belonging to hotel chains and 7% to hotel cooperations.
- ➢ **Guest Profile**: 69% of hotels primarily catered to holiday/leisure travellers, while 24% focused on business guests.
- ➢ **Hotel Classification**: 84% of hotels reported having an official classification. Among them, 3-star hotels dominated the sample (42%), followed by 4-star hotels (30%), 2-star hotels (16%), and 5-star hotels (7%).
- ➢ **Hotel Size**: The sample includes hotels of varying sizes, with a median of 31 rooms. Most hotels (81%) have fewer than 100 rooms.
- ➢ **Staffing**: Staffing levels were generally modest, with a median of 10 full-time employees and 71% of hotels employing fewer than 20 people.

- **Further sample details** on a **country-base** are shown in **annex 2**.

Summary of Overall Sample Characteristics: Cross-Country Patterns and Contrasts in Structure, Segments, and Settings

The cross-country comparison of hotel sample characteristics across Austria, France, Germany, Greece, Italy, and Switzerland reveals both structural similarities and marked differences in the European hospitality landscape. A key similarity across all countries is the **predominance of small to mid-sized, independent hotels:** most properties operate with fewer than 50 rooms and under 20 full-time employees, indicating a strong presence of family-run or owner-managed businesses. Additionally, **3-star and 4-star hotels consistently represent the majority of classified properties**, forming the backbone of the accommodation offer in all surveyed countries.

Despite these common traits, **notable differences emerge in hotel location and customer segments**. Mountain resorts are dominant in Italy (mainly hotels from Trentino Region were contacted) and Switzerland, reflecting their alpine tourism orientation, while seaside hotels represent a significant share in Greece, and urban settings are more common in France and Germany. In terms of clientele, Greece and Italy rely almost exclusively on holiday and leisure travelers, whereas France and Germany have a more balanced market mix with business travelers.

Another contrast lies in hotel classification: while Greece, France, and Italy report over 90% official classification rates, much higher than in the other countries. Moreover, large hotels with over 100 rooms are rare in most countries but more present in Greece, likely linked to its resort infrastructure.

Finally, **more than 80% of surveyed hotels operate independently**, underscoring the highly fragmented structure of the European hotel industry. Chain-affiliated or cooperative hotels remain a minority across all countries—except in France, where the proportion is significantly higher at 41%.

> **The Survey Results: Distribution/sales technologies & strategies**

> **Revenue Management Strategies**

Adoption of Revenue Management Strategies in the Hotel Sector

Does your hotel currently implement a revenue management strategy?

Effective responses: 1,446

Response rate: 97%
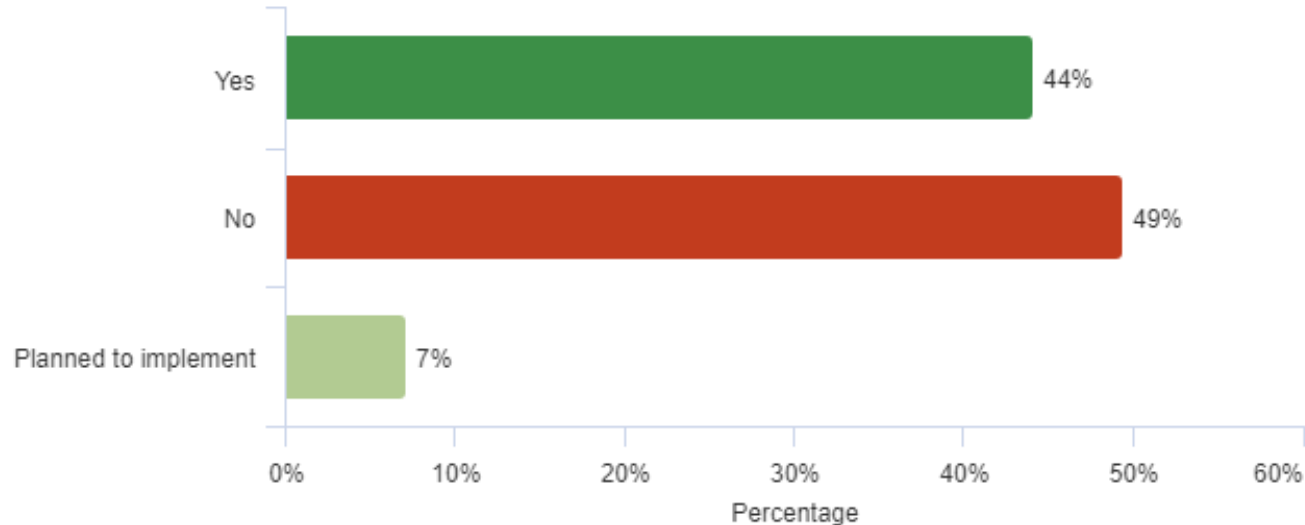
Less than half of the surveyed hotels (44%) currently implement a revenue management strategy, while 49% do not, and 7% plan to introduce one in the future. This highlights a significant opportunity to expand revenue management practices, especially among smaller and independent hotels.

Who Adopts Revenue Management? Hotel Profiles and Adoption Patterns

The adoption of revenue management (RM) strategies is closely tied to hotel characteristics, with clear differences between adopters and non-adopters. Hotels that implement RM (44% of the sample) are **typically larger, urban, and classified**. Most are located in big cities (65%), target both leisure and MICE segments, and are classified (81%), with 46% in the 4-star and 7% in the 5-star categories. Nearly half have 60–70 rooms, suggesting the presence of sufficient demand complexity and resources to support RM systems.

In contrast, **hotels not using RM** (49%) are often small (70% have fewer than 20 rooms), unclassified (45%), and focused on leisure guests (74%). A significant share are located in rural areas, where operational complexity and digital integration may be lower.

Hotels planning to adopt RM (7%) represent a transitional group—mostly small and leisure-focused, but more urban and more likely to be classified. Their interest suggests that RM is slowly becoming more accessible, even for smaller establishments.

In summary, **RM strategies remain concentrated in larger, professionally managed hotels**, but there are signs of broader uptake as tools become simpler and more affordable. Bridging the gap for smaller properties remains key to increasing adoption across the sector.

> **Revenue Management Tools**

Tools Supporting Revenue Management Decisions in Hotels

If yes, what tools or systems do you use to support your revenue management decisions? (select all that apply)

Effective responses: 636

Response rate: 42%
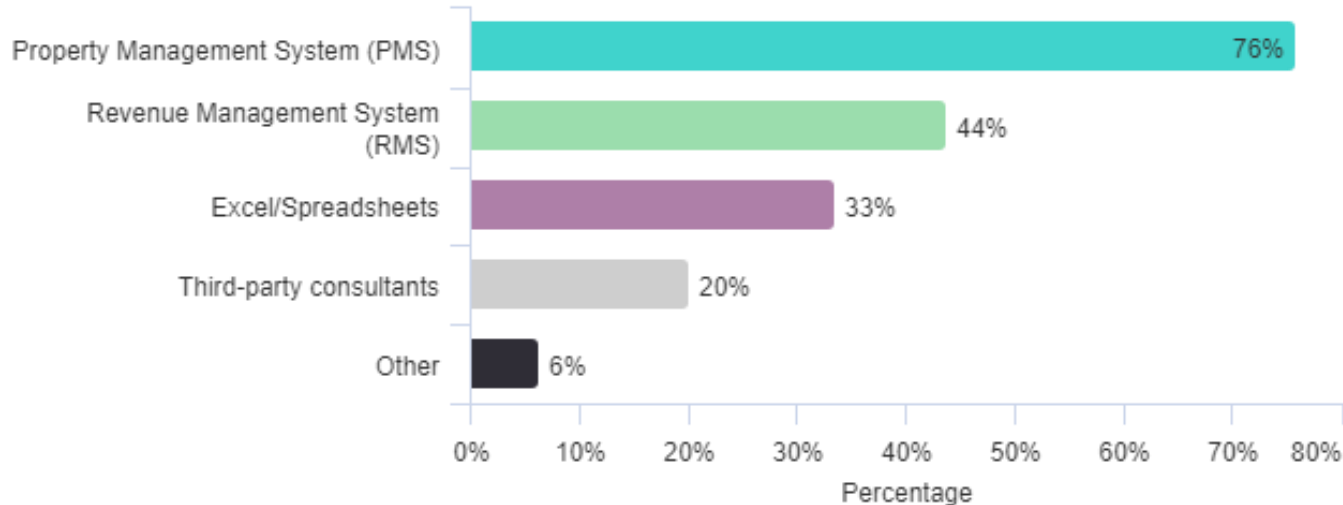
Among hotels that apply a revenue management strategy, Property Management Systems (PMS) are by far the most commonly used tool (76%) to support RM decisions, followed by dedicated Revenue Management Systems (44%) and spreadsheets (33%). A notable portion (20%) still rely on third-party consultants, reflecting a blend of internal and external expertise in the decision-making process.

Revenue Management Tools by Hotel Profile

Property Management Systems (PMS) are used by 76% of respondents to support revenue management strategies, are often found in hotels serving MICE segments and are most common in medium-sized properties with 40 to 59 rooms. These hotels also tend to be officially classified, often in the 3-star or 5-star categories, and maintain an average full-time staff size of 10 to 19 employees. This suggests that PMS usage is widespread in professionally run, midsize hotels with structured operations and a need for centralized data management.

Revenue Management Systems (RMS), used by 44% of respondents, are more frequently found in Austria, Germany, and Switzerland. These systems are used mostly in larger urban hotels (53%) that cater to both holidaymakers and business travelers. The adoption of RMS is notably higher in hotels with 30 or more rooms and typically staffed by 20 or more full-time employees. This tool appears more prevalent in high-capacity, city-based hotels with a higher operational complexity, where algorithmic pricing and demand forecasting offer tangible benefits.

Excel and Spreadsheets, used by 33%, remain common in Germany, Greece, and Switzerland, especially in smaller or rural hotel settings such as countryside villages, mountain resorts, and seaside locations. Excel use seems to reflect either a preference for flexible, cost-effective solutions or limited access to more advanced systems, particularly in non-urban contexts.

Overall, the choice of revenue management tools is clearly influenced by hotel size, location, client segment, and national context. PMS tools are the most universally adopted, while RMS tools are concentrated in larger, urban hotels with more staffing capacity. Excel remains a widespread fallback solution in rural and leisure-driven environments.
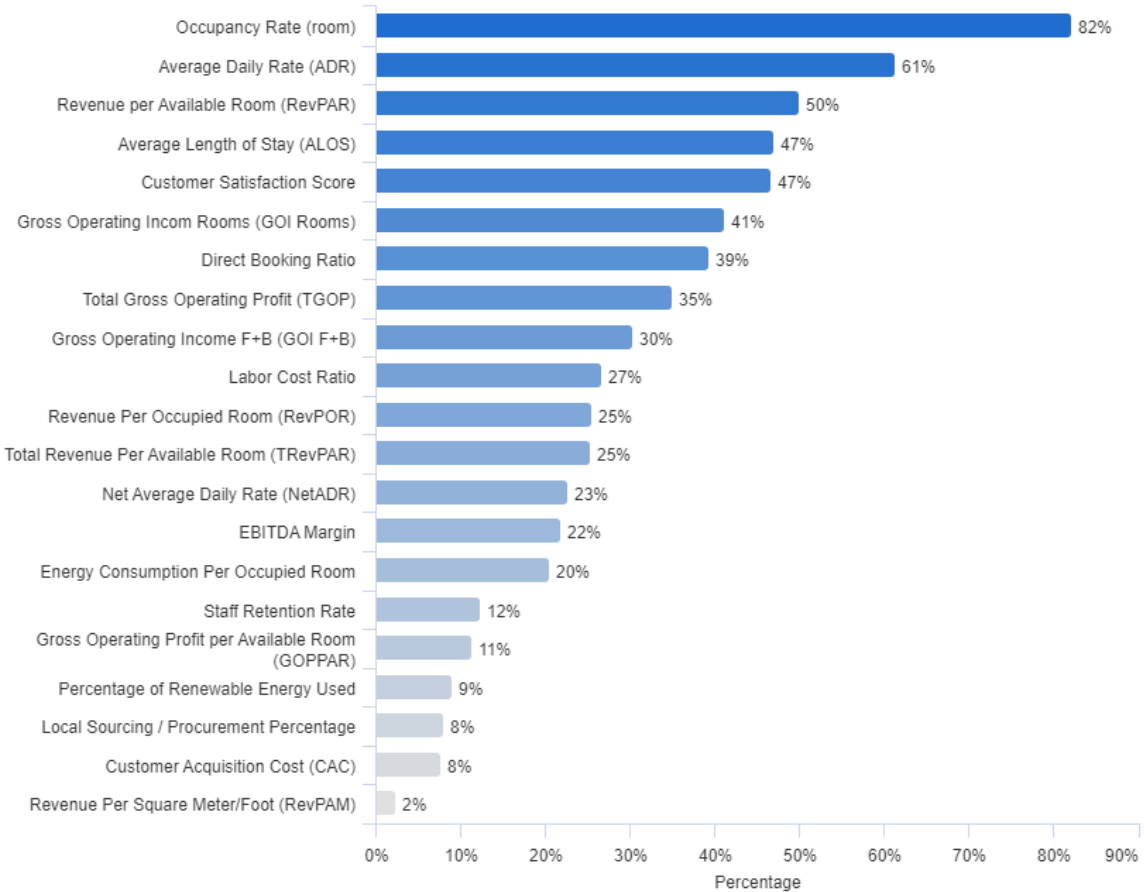
> **Key Performance Indicators (KPIs)**

Key Performance Indicators (KPIs) Tracked by Hotels

Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel's performance? (select all that apply)

KPI	Percentage
Occupancy Rate (room)	82%
Average Daily Rate (ADR)	61%
Revenue per Available Room (RevPAR)	50%
Average Length of Stay (ALOS)	47%
Customer Satisfaction Score	47%
Gross Operating Incom Rooms (GOI Rooms)	41%
Direct Booking Ratio	39%
Total Gross Operating Profit (TGOP)	35%
Gross Operating Income F+B (GOI F+B)	30%
Labor Cost Ratio	27%
Revenue Per Occupied Room (RevPOR)	25%
Total Revenue Per Available Room (TRevPAR)	25%
Net Average Daily Rate (NetADR)	23%
EBITDA Margin	22%
Energy Consumption Per Occupied Room	20%
Staff Retention Rate	12%
Gross Operating Profit per Available Room (GOPPAR)	11%
Percentage of Renewable Energy Used	9%
Local Sourcing / Procurement Percentage	8%
Customer Acquisition Cost (CAC)	8%
Revenue Per Square Meter/Foot (RevPAM)	2%

Non-responses are ignored when calculating the percentage.

The overall use of KPIs indicates a moderate level of operational maturity in the hotel sector. Most hotels track fundamental financial and operational metrics such as occupancy rate (82%), ADR, and RevPAR, which are essential for short-term revenue optimization. However, the limited use of more advanced or strategic indicators—such as EBITDA margin, customer acquisition cost, or sustainability metrics (all under 25%)—suggests that many hotels still operate with a tactical rather than strategic performance mindset.

This pattern reflects a sector that has embraced basic data-driven practices, particularly in pricing and occupancy management, but has not yet fully evolved toward integrated, long-term performance monitoring involving profitability, environmental impact, or workforce retention.

Overall, this suggests that performance evaluation in many hotels remains primarily focused on room revenue rather than overall profitability.

Advanced KPI Usage: Who Tracks What in Hotel Performance Monitoring?

Hotels that actively **track advanced KPIs** such as NetADR (23%), RevPOR (25%), EBITDA margin (22%), or sustainability indicators **tend to be larger properties with more structured operations**. NetADR is notably used by hotels located in Germany, Greece, and Switzerland, often situated in big cities but also in resorts and coastal areas, indicating a blend of urban and leisure-focused properties. These hotels are frequently star-rated and operate with a 2-star category or higher, suggesting a minimum level of formal classification and professional structure.

RevPOR, which provides deeper insight into profitability per occupied room, is more common among French and Greek hotels in rural areas, with a significant share of 5-star establishments. This points to a niche of upscale countryside hotels with refined profitability tracking, potentially linked to individualized pricing strategies.

In contrast, the most **basic and widely adopted KPIs**—occupancy (82%), ADR (61%), and RevPAR (50%)—are typical of business-oriented, city-based hotels in France, Germany, and Switzerland. These hotels are highly formalized (80%+ star-rated), often 3- or 4-star, and serve business or MICE segments. This indicates a strong culture of tactical performance monitoring focused on short-term yield optimization.

Overall, the use of advanced KPIs is concentrated in hotels with higher classification, larger staff and room capacities, and a clear orientation toward either high-end profitability or sustainability. Meanwhile, basic KPIs remain dominant among mid-market and urban hotels, suggesting a gap in strategic and long-term performance tracking across much of the sector.

> **Self-Perception of Competitive Position**

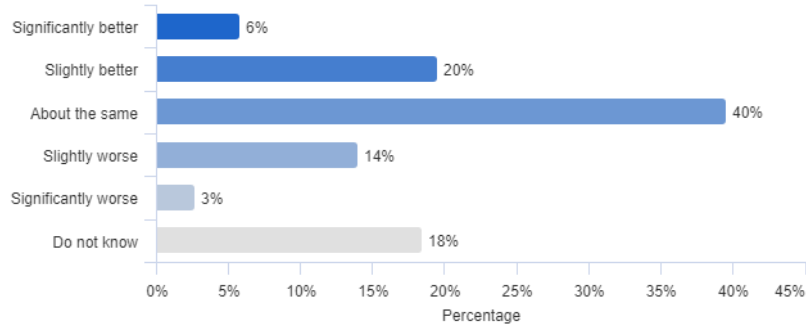# Self-Perception of Competitive Position: Revenue and Market Share

How do you perceive your hotel's revenue performance compared to your competitors?
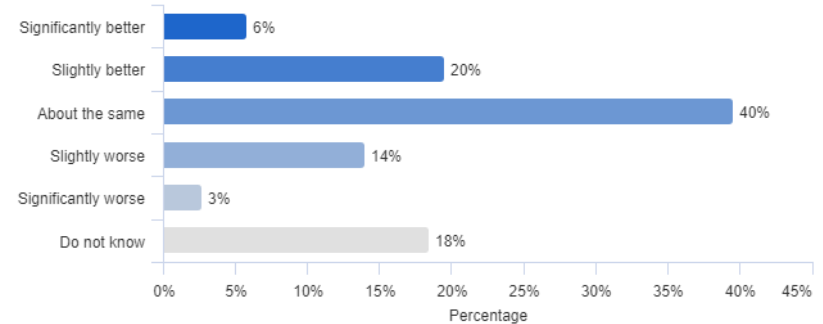
Effective responses: 1,443   *Response rate: 96%*

Category	Percentage
Significantly better	6%
Slightly better	20%
About the same	40%
Slightly worse	14%
Significantly worse	3%
Do not know	18%

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

Effective responses: 1,441   *Response rate: 96%*

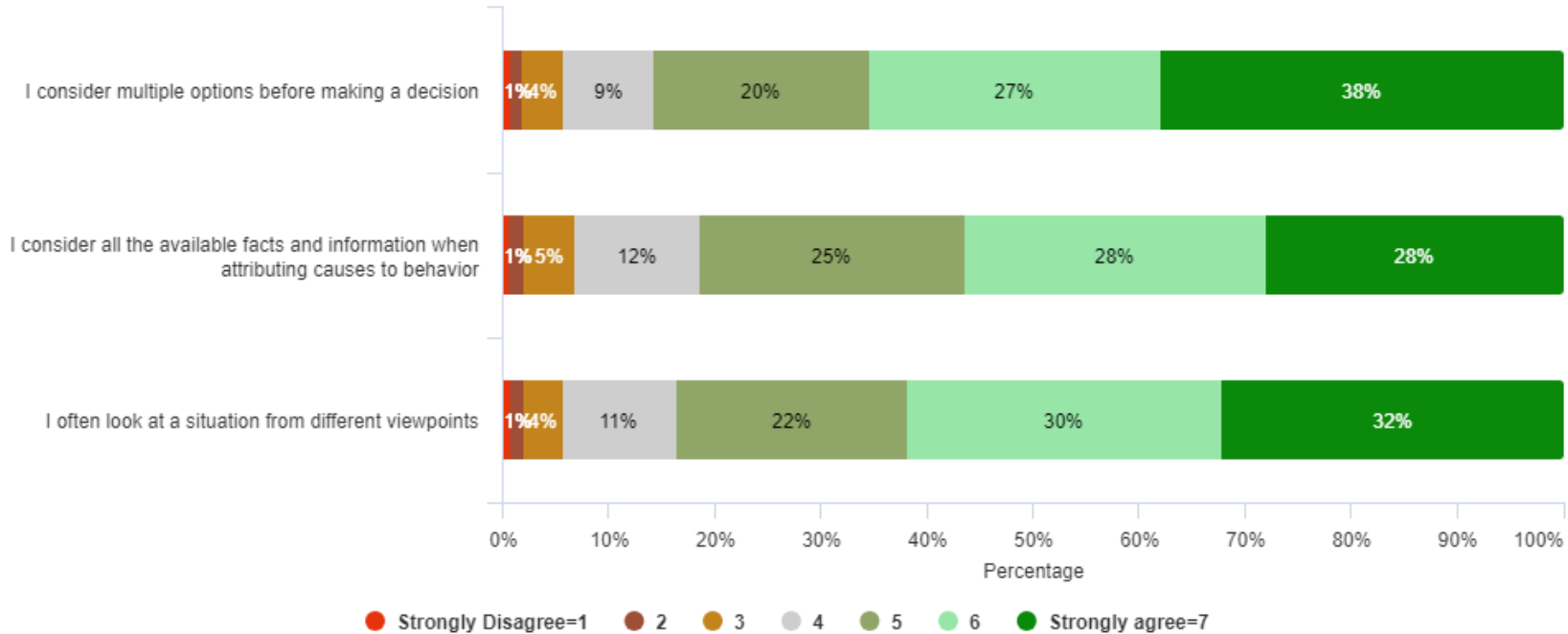| Category	Percentage
Leading in market share	5%
Slightly above average	26%
On par with competitors	39%
Slightly below average	12%
Losing market share significantly	2%
Do not know	16%
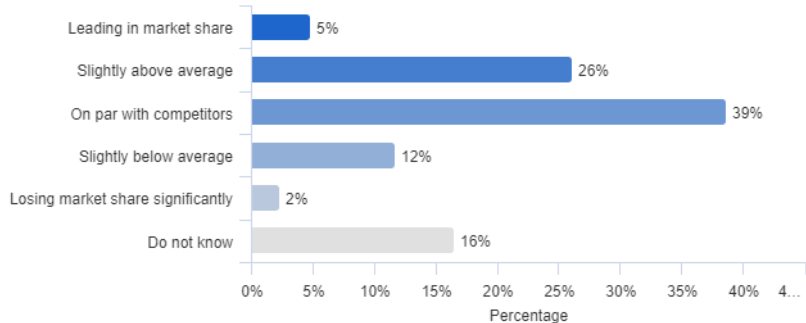
Most hoteliers perceive their performance as broadly aligned with their competitors: 40% say their revenue is "about the same," and 39% assess their market share similarly. However, optimism is limited—only a minority view themselves as significantly outperforming the market (6% for revenue, 5% for market share), while a notable share (18%–16%) are unsure, reflecting limited benchmarking or data-based comparison practices. The relatively high share of "Do not know" responses (18% for revenue performance and 16% for market share) suggests a lack of competitive benchmarking or access to comparative data among many hotels.

Decision-Making Orientation and Analytical Thinking in Hotel Management

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

Statement	1	2	3	4	5	6	7
I consider multiple options before making a decision	1%		4%	9%	20%	27%	38%
I consider all the available facts and information when attributing causes to behavior	1%		5%	12%	25%	28%	28%
I often look at a situation from different viewpoints	1%		4%	11%	22%	30%	32%

Legend: ● Strongly Disagree=1 ● 2 ● 3 ● 4 ● 5 ● 6 ● Strongly agree=7

The results indicate a strong inclination toward reflective and analytical decision-making among respondents. A clear majority agree or strongly agree that they consider multiple options (65%), review all available facts (56%), and evaluate situations from different perspectives (62%), reflecting a mindset aligned with data-informed and thoughtful management practices.

Between Intent and Practice in Hotel Management

The survey results reveal a **notable gap between managerial mindset and operational practice** in the hotel sector. On the one hand, hoteliers express a strong inclination toward **analytical thinking and thoughtful decision-making**: the majority claim to consider multiple options, consult available information, and adopt different viewpoints when making decisions. This indicates an openness to reflective, data-informed management principles.

However, this stated mindset does **not yet consistently translate into systematic data-driven practices**. KPI tracking remains concentrated around a few core metrics such as **occupancy, ADR, and RevPAR**, while more strategic, cost-based, or sustainability-related indicators (e.g. EBITDA margin, CAC, energy consumption) are **used by fewer than a quarter of hotels**. The limited use of advanced KPIs, coupled with high proportions of "Do not know" responses regarding competitive performance, suggests that many establishments **lack robust benchmarking tools, structured reporting systems, or access to comparative market intelligence**.

The widespread reliance on basic tools like PMS and spreadsheets, with limited adoption of specialized RMS or external consulting, further supports the picture of a sector with **uneven operational maturity**—particularly among small and independent hotels.

In sum, the findings suggest that while **the cognitive foundations for analytical decision-making exist**, they are **not yet fully supported by technical systems, strategic KPIs, or external data inputs**. This creates an important opportunity for capacity building: equipping hoteliers with the tools and training needed to bridge the gap between **intent and implementation** in performance management and competitive positioning.

To better **leverage the analytical capabilities of AI, it would be beneficial for hotels to integrate data from disparate systems into a more unified dataset**. Strengthening both data consolidation and analytical literacy can help generate deeper insights and support more informed, forward-looking decision-making over time.

Decision-Making Maturity Across Hotel Segments

The survey results reveal a strong prevalence of analytical thinking and reflective decision-making across the hotel sector. A significant 65% of hotel managers say they consider multiple options before making decisions, with 56% reviewing all available facts and 62% examining situations from multiple viewpoints. Notably, those who scored highest on analytical thinking (value 7) are most often affiliated with larger, more structured hotels and primarily operate in countries like Austria, France, and Germany. Hotels with this strong decision orientation also tend to serve MICE and business segments and are more often classified as 4- or 5-star establishments, indicating a higher level of operational maturity.

Conversely, those scoring low on analytical thinking (values 1–3) are typically from smaller or rural establishments, often with no official classification or 1–2 stars, and mostly located in countryside or smaller urban areas. These respondents are less likely to serve complex client segments like business or MICE travelers, suggesting more operationally simple or seasonal business models.

This pattern suggests a **strong link between the complexity of the hotel operation (in terms of size, location, and market segment) and the degree of analytical reasoning applied to managerial decisions**. Advanced analytical practices are particularly common among higher-end hotels in structured market environments, reinforcing the role of data-driven thinking in more competitive or differentiated segments.
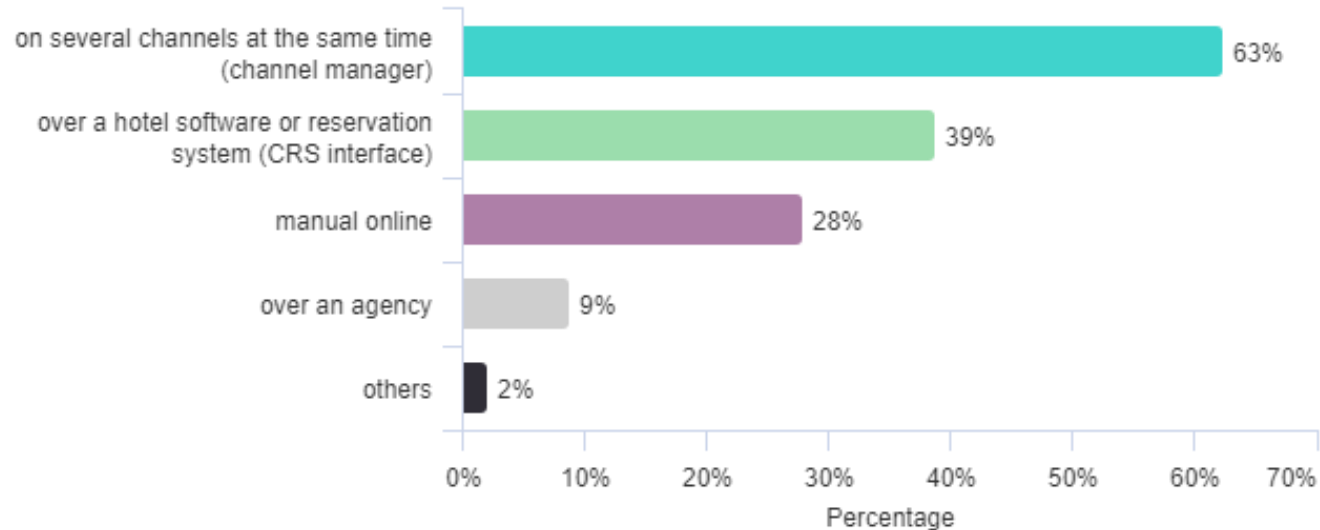
> **Distribution technologies**

Technological Practices for Rate and Availability Management on Online Channels

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

Effective responses: 1,416   Response rate: 95%

The majority of hotels (63%) manage rates and availability via a channel manager, indicating a broad adoption of centralized, automated tools for multi-channel distribution. However, a significant share still relies on hotel software or CRS interfaces (39%) or even manual updates (28%), revealing that a substantial portion of the sector has not yet fully automated their distribution operations, which may limit efficiency and responsiveness in dynamic pricing environments.

Segmentation of Technology Adoption for Rate and Availability Management

Hotels that adopt advanced technological tools to manage rates and availabilities—such as channel managers—tend to be **larger properties located in big cities**, especially in France, Greece, and Switzerland. These establishments likely serve more diversified markets and require automated solutions to streamline operations across multiple booking platforms.

By contrast, hotels that rely on CRS interfaces are more often located in seaside or rural destinations and cater to a mix of leisure and business travellers. This segment reflects partial digitalization, with a moderate degree of operational complexity and a need for centralized rate management.

Hotels still using **manual updates** (28%) are overrepresented in **smaller cities or rural areas**. These properties are **often independent or of smaller scale**, and they may lack the infrastructure or perceived need to automate distribution processes. This group appears more prevalent in Switzerland and Greece.

Interestingly, agency-based management is still used by a minor share of hotels (9%), typically in coastal or seasonal markets where external intermediaries handle distribution. These are likely smaller properties with limited internal digital capabilities.

Overall, while a majority of hotels are embracing automation, the persistence of manual or semi-manual approaches highlights the digital divide that still exists, particularly across location types, customer segments, and destination profiles.
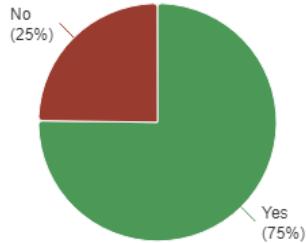
> **Property Management Systems (PMS)**

Adoption and Renewal Intentions for Property Management Systems (PMS)

Do you work with a PMS (Property Management System) / Front Office system?
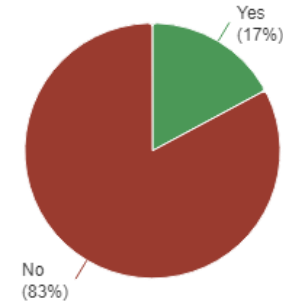
Effective responses: 1,396　　　*Response rate: 93%*

No (25%)
Yes (75%)

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

Effective responses: 1,013　　　*Response rate: 68%*

Yes (17%)
No (83%)

If not, do you plan to acquire a PMS within the next 24 months?

Effective responses: 321　　　*Response rate: 21%*

Yes (20%)
No (80%)
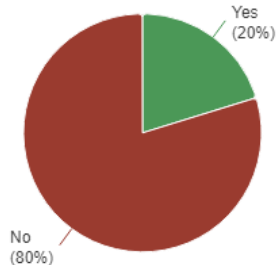
A strong majority of hotels (75%) already use a Property Management System, confirming its role as a foundational digital tool in the sector. However, among non-users, only 20% plan to adopt a PMS within the next 24 months, and among current users, just 17% intend to change systems—suggesting a slow pace of digital transition and low renewal dynamics, especially among smaller or more traditional operators. This points to both the consolidation of PMS usage and the need for more targeted support or incentives to accelerate digital upgrades.

Diversity of PMS/Front Office Systems Used in the Hotel Sector

Which PMS/Front Office do you currently use?					
	%		**%**		**%**
protel on-premsies (SPE/MPE)	11.00%	HOTSOFT	0.80%	Betisoft	0.30%
protel Cloud	8.60%	Sihot	0.80%	Book.World booking management	0.30%
Oracle Opera	7.90%	WuBook	0.80%	Bookingplanner by Stardekk	0.30%
Mews	5.80%	Zimmersoftware	0.80%	Geho	0.30%
HS/3 Hotelsoftware	4.90%	beds24	0.70%	GHM	0.30%
FOLS	4.10%	Hotelmeister	0.70%	hotelcube	0.30%
Oracle fidelio Suite 8	3.50%	RoomRaccoon	0.70%	HotelPac	0.30%
Hotline	2.70%	Thais	0.70%	Hotelworks	0.30%
5stelle*	2.10%	VelHotel / Velox Pension	0.70%	Netera	0.30%
Casablanca	2.10%	Vega zucchetti	0.70%	Octorate	0.30%
ibelsa	2.10%	Clock	0.60%	Reservit	0.30%
3RPMS Hotelsoftware	2.00%	Elite	0.60%	RoomRack	0.30%
Infhotik	2.00%	Felix	0.60%	Scidoo	0.30%
Hotelizer	1.80%	Hope	0.60%	Smoobu	0.30%
Misterbooking	1.80%	Lean Hotel System	0.60%	StayNTouch	0.30%
EasyBooking	1.70%	RMS cloud	0.60%	Suite 5 Ericsoft	0.30%
Pylon	1.70%	Alexandros	0.40%	Arhon	0.10%
Apaleo	1.60%	Citadel	0.40%	easy Guestmanagement	0.10%
Guestline	1.60%	Cloudbeds	0.40%	EMMA	0.10%
WinHotel Solution	1.60%	Fiducial	0.40%	HoRes	0.10%
ASA	1.40%	Infor	0.40%	HotelPartner	0.10%
Hogatex	1.40%	Kognitiv	0.40%	Igumbi	0.10%
Gastrodat	1.10%	Little Hotelier	0.40%	Pas-H	0.10%
WELCOME NETERA	1.10%	SAP Business One 4 Hotels	0.40%	Reconline PMS	0.10%
Aida	1.00%	Unidata	0.40%	Resavio	0.10%
Amenitiz	1.00%	Xenus	0.40%	Shiji Enterprise Platform	0.10%
seekda	1.00%	Astério	0.30%	Swiss Hotel Software SHS	0.10%
Amadeus Property PM PRO	0.80%	Beddy	0.30%	SysHotel Genius	0.10%
Casy	0.80%	Bedzzle	0.30%		

The PMS landscape is highly fragmented, with no single system dominating the market. While **protel on-premises (11%)**, **protel Cloud (8.6%)**, and **Oracle Opera (7.9%)** lead the rankings, over **70 different systems** are used across the sector—many by less than 1% of respondents each. This diversity reflects a **lack of standardization**, and potentially high switching costs or vendor lock-in, which may hinder interoperability, data integration, and broader digital transformation efforts in the industry.

Revenue Management and Distribution Trends Across Six Countries (I)

The cross-country comparison of revenue management (RM) and distribution practices across France, Italy, Switzerland, Germany, Austria, and Greece reveals significant diversity in strategic adoption, technological maturity, and analytical orientation among European hoteliers.

In terms of **RM strategy adoption**, France leads the group, with 54% of responding hotels declaring that they actively implement revenue management practices. This is followed closely by Italy (49%) and Switzerland (46%), while Austria and Germany are situated in a mid-range band around 40–45%. Greece lags behind with just 38% of hotels applying RM, although a small proportion (8%) plans to implement such a strategy in the near future. Overall, the findings suggest that while awareness of RM is widespread, full adoption remains moderate across all countries surveyed.

When it comes to **technological support**, Property Management System (PMS) usage is high across the board, especially among RM adopters in Greece (81%), Switzerland (79%), and France (73%). However, the use of Revenue Management Systems (RMS), which represent a more advanced layer of decision-making technology, varies considerably. Switzerland reports the highest RMS usage (57%), followed by France (42%). In contrast, hotels in Italy and Greece show lower uptake of RMS tools (around 30%), with many still relying heavily on Excel spreadsheets or manual practices. This disparity indicates uneven levels of digital maturity, with only some markets leveraging data-driven automation to support pricing and distribution decisions effectively.

Revenue Management and Distribution Trends Across Six Countries (II)

The use of **performance metrics** to track hotel operations presents both commonalities and differences across the countries. **Occupancy** rate is the most widely monitored KPI in all markets, with tracking rates consistently exceeding 70%. Other frequently used metrics include Average Daily Rate (ADR), Revenue per Available Room (RevPAR), and Customer Satisfaction Scores, reflecting a shared reliance on traditional financial and quality indicators. However, more advanced metrics—such as Total Gross Operating Profit (TGOP), Gross Operating Income (GOI), and EBITDA—are used more frequently in France and Switzerland, suggesting a more nuanced approach to performance analysis in these countries. Notably, indicators related to environmental performance or sustainability, such as energy consumption or local sourcing, are still marginal across all markets, rarely exceeding 15% of responses.

Distribution practices further illustrate differences in technological integration. In France and Switzerland, channel managers are widely used (69%), and a significant proportion of hotels also connect their distribution to CRS interfaces or hotel software. In contrast, Italy and Greece report higher reliance on manual updates (29% and 42%, respectively), indicating more fragmented operational systems or resource constraints among smaller properties. Agency-based distribution remains rare across the entire sample.

In terms of **competitive positioning**, a shared pattern emerges. Hotels in all countries tend to perceive themselves as being "on par" with their competitors in terms of revenue, profitability, and market share. Only a minority of respondents—particularly in France and Switzerland—believe they significantly outperform their peers. In countries like Greece and Austria, many respondents express uncertainty or lack of knowledge regarding their relative position. This gap between tool adoption and strategic confidence may point to limited benchmarking capabilities or a lack of clarity about what constitutes competitive advantage in their respective markets.

Revenue Management and Distribution Trends Across Six Countries (III)

Finally, **decision-making culture** appears to be analytically oriented across the entire sample. In all countries, a large majority of hotel managers agree or strongly agree that they consider multiple options, assess available facts, and look at situations from different perspectives when making decisions. The share of strong agreement (scores of 6 or 7 on a 7-point scale) is especially high in France, Switzerland, and Greece. This demonstrates that the cognitive foundations for analytical revenue management are already present in many hotel teams, even if strategic and technological implementations are still catching up.

In **conclusion**, France and Switzerland can be characterized as more mature markets with broader adoption of RM tools, deeper KPI tracking, and higher digital integration. Italy, Austria, and Germany show moderate maturity, with growing but incomplete use of RMS and distribution technology. Greece stands out as the least mature market in RM implementation, despite high PMS penetration and a positive decision-making culture. Overall, the next step for most countries lies in expanding the use of advanced analytics and RMS, improving strategic benchmarking, and incorporating broader KPIs—particularly related to environmental sustainability—into the revenue management and performance framework.

> **Conclusions**

Current Gaps in Hotel Revenue Management and Digital Practices

- **Digital Tools Are Widely Adopted, But Not Fully Optimized**
  - ➢ 75% of hotels use a Property Management System (PMS), and 63% manage rates with a channel manager—indicating a strong baseline of digital infrastructure. However, many still rely on spreadsheets or manual updates, limiting efficiency.

- **Revenue Management Strategy Adoption Remains Uneven**
  - ➢ Only 44% of hotels have an active revenue management strategy. Advanced tools such as RMS are used by less than half, and decision-making often remains intuition-based rather than data-driven.

- **KPI Tracking Focused on Basics**
  - ➢ Hotels predominantly track occupancy (82%), ADR (61%), and RevPAR (50%). However, fewer than 25% monitor broader or strategic KPIs such as EBITDA margin, energy consumption, or staff retention — especially among independent and 1–2 star hotels.

- **Perceived Competitive Awareness Is Limited**
  - ➢ A significant share of hoteliers "do not know" how their revenue or market share compares to competitors—highlighting weak benchmarking and market intelligence practices.

Strategic Levers to Boost Digital Maturity and Competitive Resilience

- **Bridge the Mindset–Execution Gap**
  - ➢ While many hoteliers report strong analytical thinking, this is not supported by systematic use of KPIs or competitive benchmarking. Targeted support is needed to turn intention into structured, data-driven practice.

- **High Fragmentation in System Use**
  - ➢ With over 70 PMS solutions in use in the six countries survey, integration remains a key challenge. Promoting interoperability standards and shared tech platforms can support efficiency, especially for small and medium-sized hotels.

- **Accelerate Adoption of Revenue Strategies**
  - ➢ Hotels in rural areas, resorts, and the 1–3 star segment lag in RMS usage. Public or private support programs could help increase RMS adoption and training, enhancing yield optimization across the sector.

- **Build Capacity for KPI Literacy and Benchmarking**
  - ➢ Strengthening hotels' ability to monitor financial, operational, and sustainability KPIs will improve strategic agility. Industry-wide dashboards or self-assessment tools could help close the performance insight gap.

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> **Annex 1: Questionnaire**

Annex 1: The Questionnaire (1)

Artificial Intelligence (AI) and Distribution Strategies in the Hotel Sector

Dear Hoteliers,

In a rapidly changing hotel industry, the introduction of new technologies such as **Artificial Intelligence (AI)** is becoming increasingly crucial to remain competitive and optimise guest service. By taking part in our survey, you will make an important contribution to better understanding the challenges and potential of AI and **distribution strategies** and developing innovative solutions that will benefit you and the industry as a whole.

By sharing your experiences, you will help us to gain valuable insights into the current trends and requirements in hotel distribution, while also highlighting ways in which AI can be used effectively to increase efficiency and profitability.

The questionnaire should take approximately **7-10 minutes** to complete. Please rest assured that all responses will be handled confidentially, and no individual hotel will be identified in our reports or survey results, in strict accordance with data protection principles.

Please note:

- You can navigate between the pages using the arrows;

- Please do not forget to save your answers by clicking on the "save" button

Prof. Roland Schegg (roland.schegg@hevs.ch), HES-SO University of Applied Sciences Western Switzerland Valais-Wallis

in collaboration with Cindy Heo (prof. at EHL Hospitality Business School)

Annex 1: The Questionnaire (2)

General information about your hotel

In which country is your hotel located?

○ Austria   ○ France   ○ Germany   ○ Greece   ○ Switzerland

What is the location of your hotel?

☐ Big city (more than 50'000 inhabitants)   ☐ Village in countryside   ☐ Seaside

☐ Little city (between 10'000 and 50'000 inhabitants)   ☐ Mountain resort   ☐ Other

What is your main customer segment?

○ Holiday / leisure travellers   ○ Business travellers   ○ MICE (Meetings, Incentives, Conferences, Exhibitions / Events)   ○ Other

Annex 1: The Questionnaire (3)

Is your hotel officially classified (star category)?

◯ Yes   ◯ No

How many rooms does your hotel have?

[▲▼]

How many people work in your hotel (average number of full-time employees)?

[▲▼]

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

☐ No (independent hotel)   ☐ Yes, from a chain   ☐ Yes, from a hotel cooperation

Distribution/sales technologies and strategies

Does your hotel currently implement a revenue management strategy?

☐ Yes   ☐ No   ☐ Planned to implement

Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel's performance? (select all that apply)

☐ Average Daily Rate (ADR)	☐ Gross Operating Incom Rooms (GOI Rooms)	☐ Customer Acquisition Cost (CAC)
☐ Net Average Daily Rate (NetADR)	☐ Gross Operating Income F+B (GOI F+B)	☐ Customer Satisfaction Score
☐ Occupancy Rate (room)	☐ Total Gross Operating Profit (TGOP)	☐ Labor Cost Ratio
☐ Revenue per Available Room (RevPAR)	☐ Gross Operating Profit per Available Room (GOPPAR)	☐ Staff Retention Rate
☐ Revenue Per Occupied Room (RevPOR)	☐ EBITDA Margin	☐ Local Sourcing / Procurement Percentage
☐ Revenue Per Square Meter/Foot (RevPAM)	☐ Average Length of Stay (ALOS)	☐ Energy Consumption Per Occupied Room
☐ Total Revenue Per Available Room (TRevPAR)	☐ Direct Booking Ratio	☐ Percentage of Renewable Energy Used

Annex 1: The Questionnaire (8)

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

○ Significantly better   ○ Slightly better   ○ About the same   ○ Slightly worse   ○ Significantly worse   ○ Do not know

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

○ Much higher profitability   ○ Somewhat higher profitability   ○ Similar profitability   ○ Somewhat lower profitability   ○ Much lower profitability   ○ Do not know

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

○ Leading in market share   ○ Slightly above average   ○ On par with competitors   ○ Slightly below average   ○ Losing market share significantly   ○ Do not know

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

	Strongly Disagree=1	2	3	4	5	6	Strongly agree=7
I consider multiple options before making a decision	○	○	○	○	○	○	○
I consider all the available facts and information when attributing causes to behavior	○	○	○	○	○	○	○
I often look at a situation from different viewpoints	○	○	○	○	○	○	○

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

☐ on several channels at the same time (channel manager)

☐ over an agency

☐ over a hotel software or reservation system (CRS interface)

☐ manual online

☐ others

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

○ Yes

○ No

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Artificial intelligence (AI)

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

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

1=no impact at all   10=very large impact

Does your hotel use artificial intelligence (AI)?

- ⦿ Yes, for more than 5 years
- ○ Yes, for 4 years
- ○ Yes, for 3 years
- ○ Yes, for 2 years
- ○ Yes, for one year
- ○ Yes, recently
- ○ No, but it is planned
- ○ No

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

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

1=no benefits at all   10=very high benefits

Annex 1: The Questionnaire (11)

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

	Yes	It is planned	No	Don't know / Not applicable
ChatBot (applications for automated instant messaging)	○	○	○	○
Virtual assistant (e.g. Apple Siri, Amazon Alexa)	○	○	○	○
Passport validation (Guest check-in)	○	○	○	○
Facial recognition systems (Guest check-in)	○	○	○	○
Customer profiling (creation of unified customer profile)	○	○	○	○
Personalised service for customers (personalised e-mailing, recommendations, guest app)	○	○	○	○
Automatic menu creation and validation (cost of menu modification, streamlining of routine validation process)	○	○	○	○
Collection and analysis of waste (waste management)	○	○	○	○
Real-time revenue management (dynamic pricing)	○	○	○	○
Predictive analytics (e.g. occupancy rate, profitability of a hotel)	○	○	○	○
Workforce planning	○	○	○	○
Analysis and feedback on online customer reviews	○	○	○	○
Automation of responses to customer comments	○	○	○	○
ChatGPT, Gemini or other content generation services: Generation of texts for guest communication (Email, Website))	○	○	○	○
Generation of images for content (e.g. Midjourney, DALL.E2)	○	○	○	○
Automation of the hotel or hotel room (e.g. Andivi) and robotics (e.g. robot Pepper).	○	○	○	○
Assistance systems for product development, communication (e.g. ReGuest)	○	○	○	○

If you use or plan to use other AI-based technologies or tools, please specify:

Enter your text here

Annex 1: The Questionnaire (12)

In which areas do you think AI will be the most useful for hotels? (several choices possible)

☐ Finance

☐ Human ressources

☐ Reservations

☐ Customer relationship management (e.g. customer profiling, personalized service for customers)

☐ Personalization of the customer experience

☐ Predictive maintenance management

☐ Optimising the efficiency of operational processes

☐ Marketing (content generation for social networks, website etc.)

☐ Kitchen (generation of ideas for the menu, creation and validation of menus)

☐ Kitchen (measure and monitor food waste)

☐ Enhancing data analysis and reporting capabilities

☐ Improving inventory and supply chain management

☐ Streamlining financial analysis and forecasting.

☐ Enhancing cybersecurity and fraud detection.

☐ Others, please specify

Annex 1: The Questionnaire (13)

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? (multiple choices possible)

- [ ] Lack of quality data
- [ ] Uncertain return on investment (ROI)
- [ ] High technical complexity of AI systems
- [ ] Employee resistance to change
- [ ] Strategy is focused on a traditional customer experience.
- [ ] Lack of technical skills to use AI
- [ ] Faulty and immature products
- [ ] Lack of suitable and affordable 'off the shelf' products
- [ ] Difficulty integrating AI into existing processes
- [ ] Poor knowledge of AI solutions available on the market
- [ ] It was difficult to find a reliable AI service provider

- [ ] Concerns about security and privacy of customer data
- [ ] Lack of understanding of AI in general
- [ ] Ethical concerns around AI decisions
- [ ] Reliability and accuracy of AI outputs
- [ ] Lack of understanding of the benefits of AI
- [ ] High setup cost
- [ ] No management support
- [ ] Compatibility of AI systems with our information system
- [ ] Strict data protection and privacy regulations
- [ ] Other challenge(s) or obstacle(s):

Annex 1: The Questionnaire (14)

What are the experienced or perceived benefits of introducing these technologies for a hotel? (Multiple answers possible)

- ☐ Time savings
- ☐ Improving operational efficiency
- ☐ Improved intercultural communication (internal and external)
- ☐ Reducing costs
- ☐ Improved data management and analysis
- ☐ Improved competitive position
- ☐ Sustainable development (optimization of resources etc.)

- ☐ Improving communication and marketing
- ☐ Optimized tourist experience design
- ☐ Improved response capability to emergency situations.
- ☐ Increase in sales
- ☐ Improved user experience
- ☐ Improving decision-making
- ☐ Other benefits

What are the 3 most useful AI tools in your hotel? Name the products:

> Enter your text here

Do you have any general comments on AI in the hospitality industry?

> Enter your text here

If you wish to receive a summary of the study, please indicate your e-mail address:

> Enter your text here

Thanks for your collaboration!

Please save your answers

> **Annex 2: Sample Profile by Country**

Annex 2: Sample Characteristics <u>Austria</u> (I): location

What is the location of your hotel?

Effective responses: 129   *Response rate: 100%*

Location	Percentage
Village in countryside	45%
Big city (more than 50'000 inhabitants)	30%
Mountain resort	17%
Little city (between 10'000 and 50'000 inhabitants)	9%
Other	3%
Seaside	0%
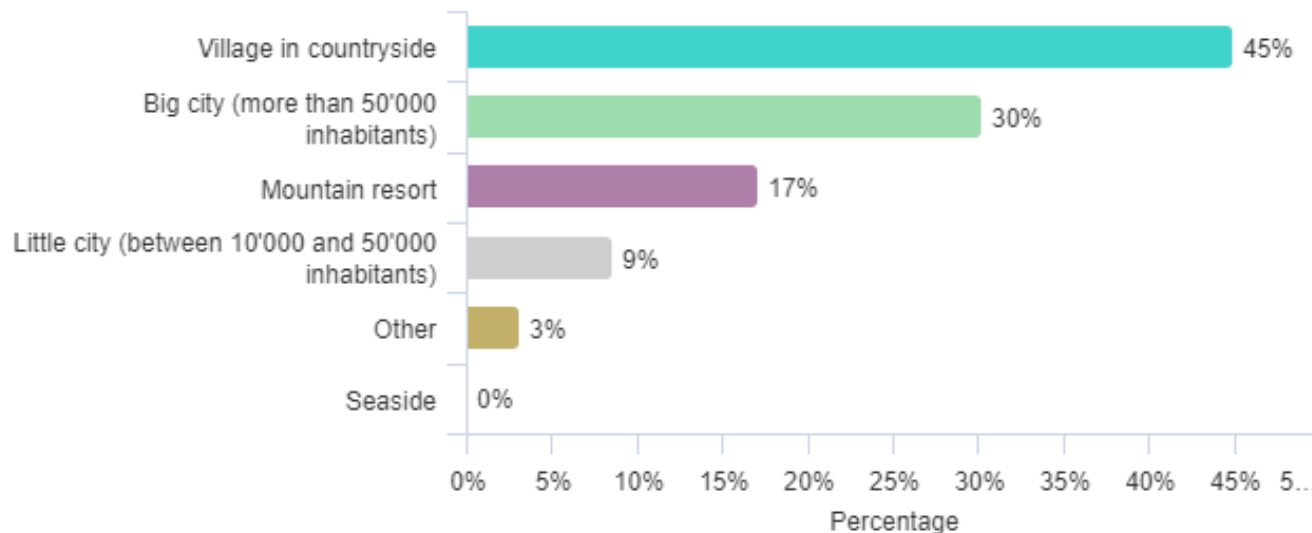
Annex 2: Sample Characteristics __Austria__ (II): customer segments

What is your main customer segment?

Effective responses: 129   Response rate: 100%

Segment	Percentage
Holiday / leisure travellers	70%
Business travellers	25%
MICE (Meetings, Incentives, Conferences, Exhibitions / Events)	4%
Other	2%

Percentage
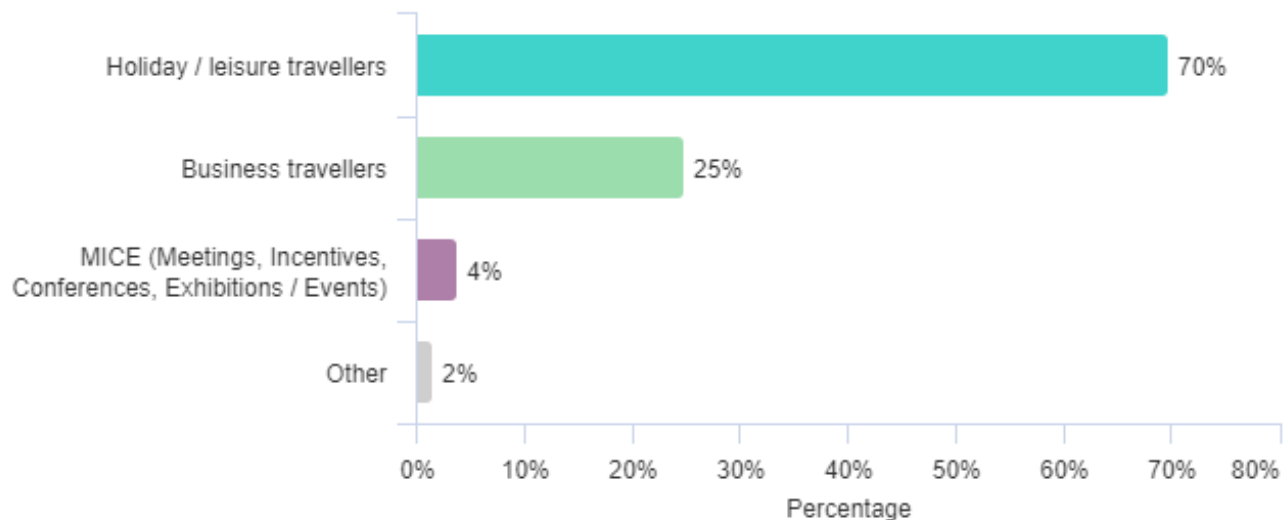
Annex 2: Sample Characteristics <u>Austria</u> (III): classification

Is your hotel officially classified (star category)?

Effective responses: 103

Response rate: 80%

No (30%)

Yes (70%)
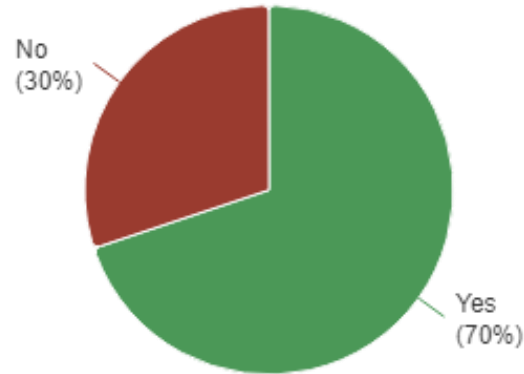
Annex 2: Sample Characteristics <u>Austria</u> (IV): star rating

If yes, what is the star rating of your hotel?

Effective responses: 71   Response rate: 55%

Star rating	Percentage
1	0%
2	4%
3	35%
4	56%
5	1%
Autre	3%

Percentage
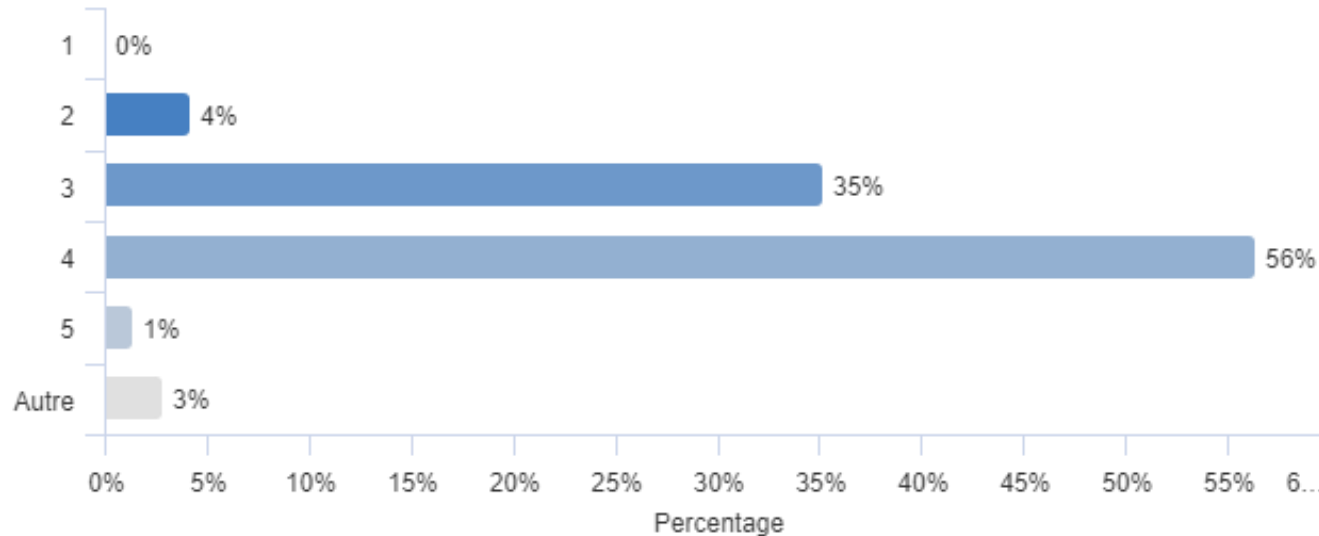
Annex 2: Sample Characteristics <u>Austria</u> (V): size of hotels

How many rooms does your hotel have?

Effective responses: 115
Mean: 51.5
Min - Max: 6.0 - 600.0

Response rate: 89%
Median: 30.0

Annex 2: Sample Characteristics <u>Austria</u> (VI): number of staff

How many people work in your hotel (average number of full-time employees)?

Effective responses: 123
Mean: 20.8
Min - Max: 1.0 - 502.0

Response rate: 95%
Median: 10.0

Annex 2: Sample Characteristics <u>Austria</u> (VII): type of hotel

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

Effective responses: 120   *Response rate: 93%*
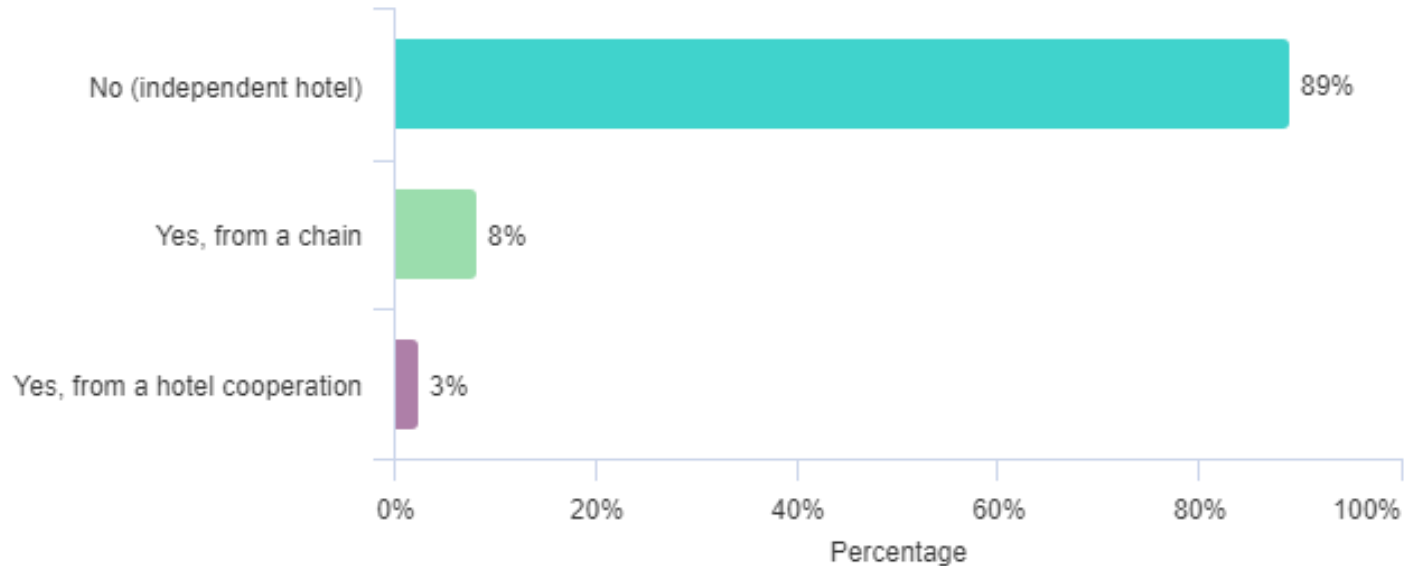
Summary of overall sample characteristics for Austria

The Austrian sample includes 129 effective responses and reflects the characteristics of a predominantly leisure-oriented, independent hotel market located in rural and alpine regions. The following features stand out:

Location:
Hotels are mainly located in **villages (45%)** and **big cities (30%)**, with **mountain resorts** accounting for **17%**. No hotels reported being located in seaside areas.

Customer Segments:
The vast majority of Austrian hotels cater to **holiday/leisure travellers (70%)**, while **business travellers** make up **25%**. MICE clients account for only **4%**, showing a strong orientation toward leisure markets.

Classification and Star Rating:
70% of hotels are **officially classified**, and among them, the most frequent category is **4-star (56%)**, followed by **3-star (35%)**. Only **1%** are in the 5-star segment.

Size and Staffing:

    Room capacity is centered around small to medium sizes:
    Most hotels have between **10 and 99 rooms**, with the median at **30 rooms**.

    Staff size is also modest:
    68% of hotels operate with fewer than **20 full-time employees**, reflecting the **SME-dominated** nature of the Austrian hotel sector.

Type of Hotel:
A clear **majority (89%)** are **independent hotels**, with minimal participation in hotel chains (8%) or cooperations (3%).
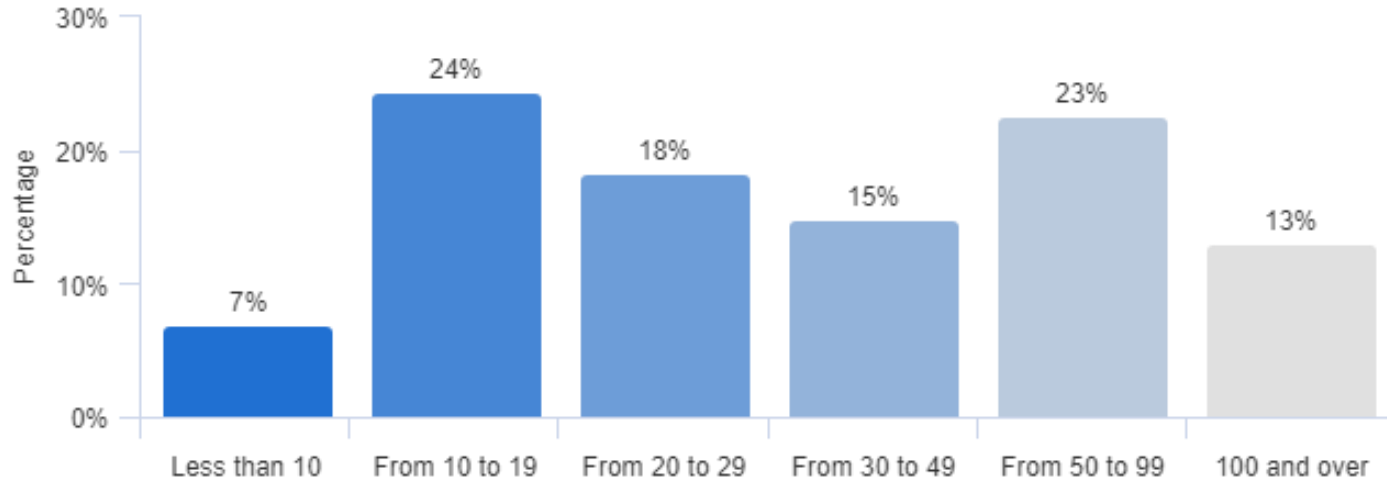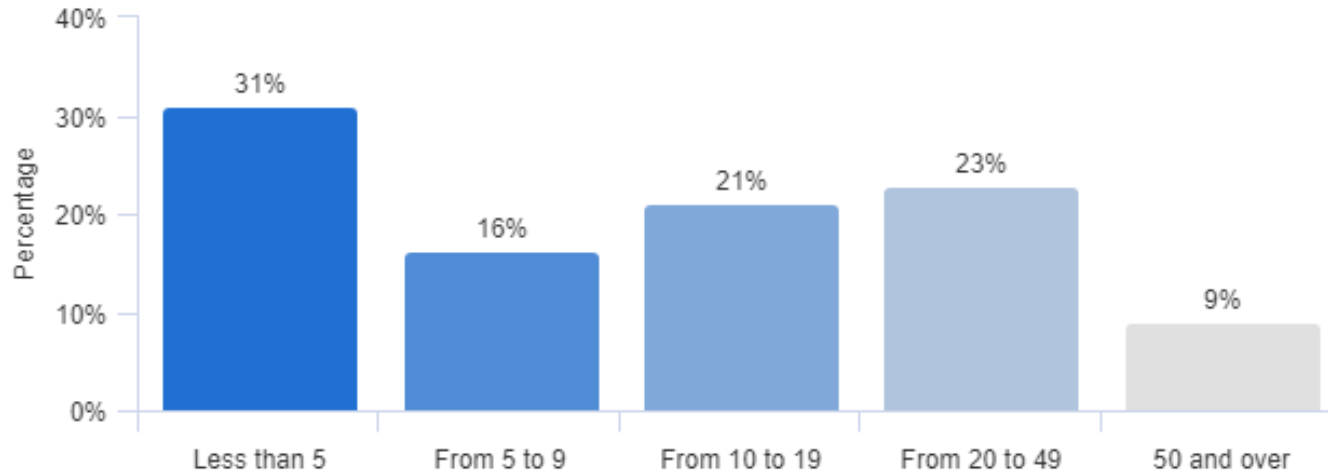
Annex 2: Sample Characteristics <u>Germany</u> (I): location

What is the location of your hotel?
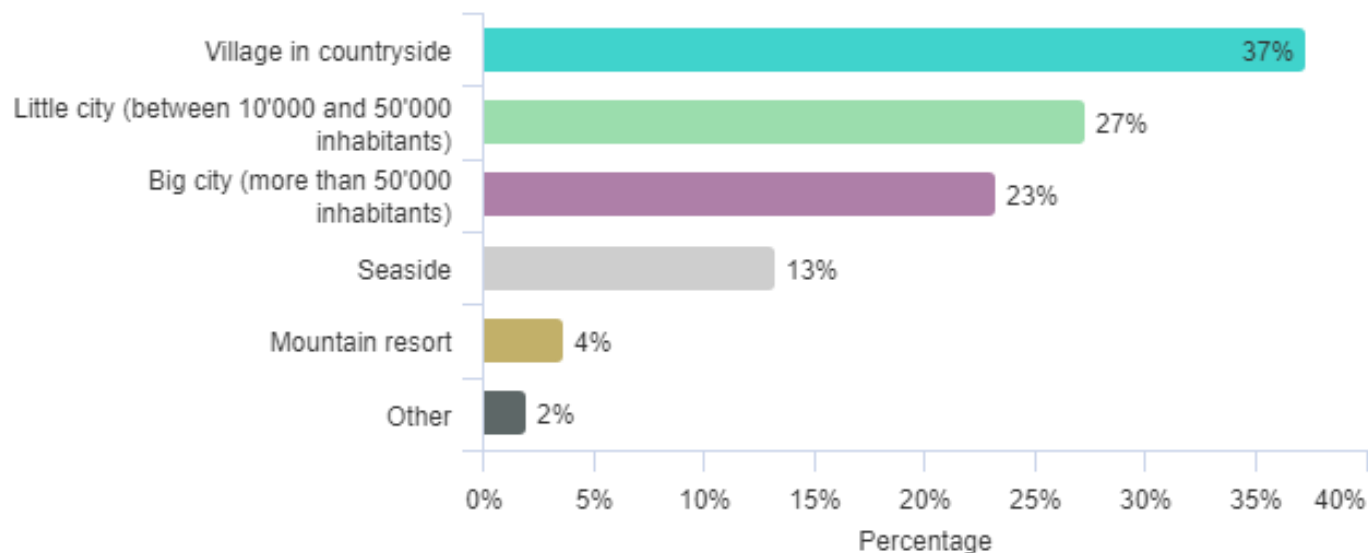
Effective responses: 249

Response rate: 99%

Location	Percentage
Village in countryside	37%
Little city (between 10'000 and 50'000 inhabitants)	27%
Big city (more than 50'000 inhabitants)	23%
Seaside	13%
Mountain resort	4%
Other	2%

What is your main customer segment?

Effective responses: 248
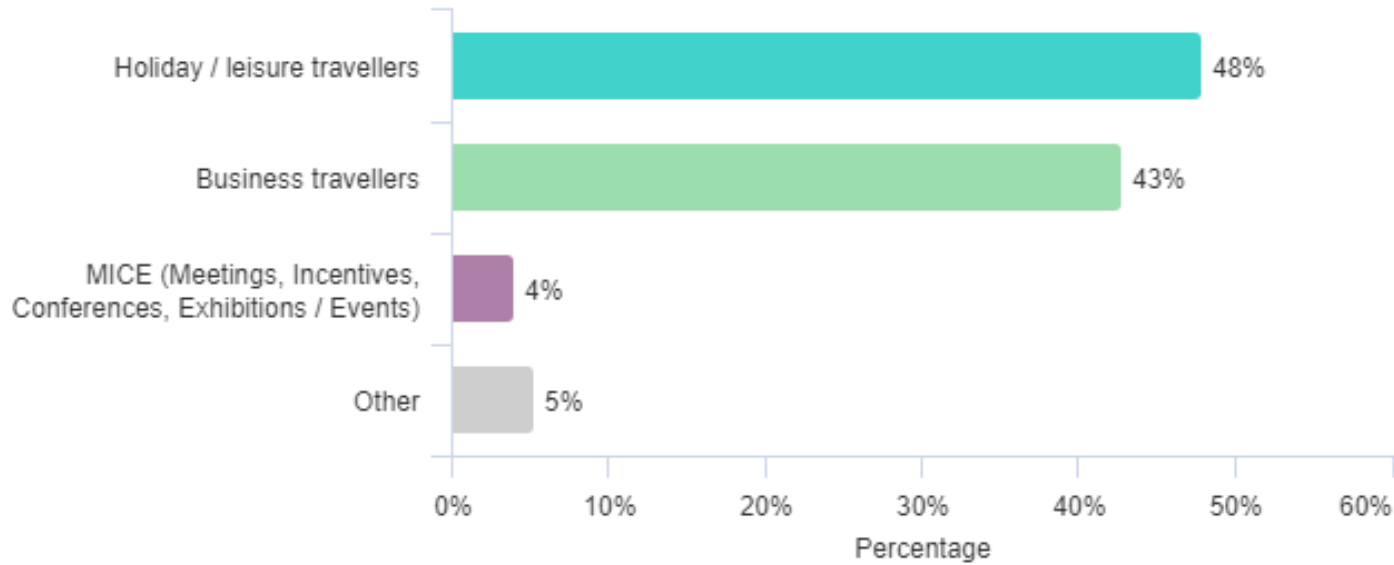
Response rate: 98%

Annex 2: Sample Characteristics __Germany__ (III): classification

Is your hotel officially classified (star category)?

Effective responses: 209

Response rate: 83%

No
(47%)

Yes
(53%)
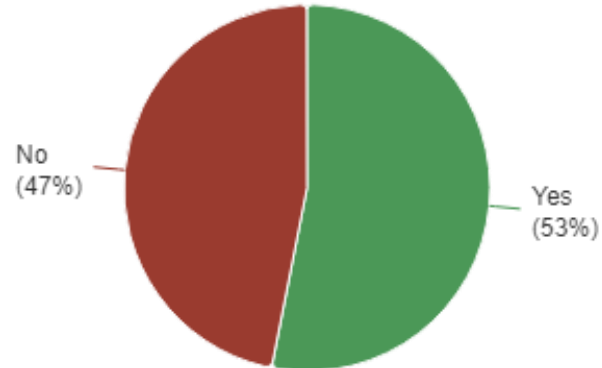
Annex 2: Sample Characteristics **Germany** (IV): star rating

If yes, what is the star rating of your hotel?

Effective responses: 111   *Response rate: 44%*

Rating	Percentage
1	0%
2	3%
3	40%
4	52%
5	5%
Autre	1%

Percentage
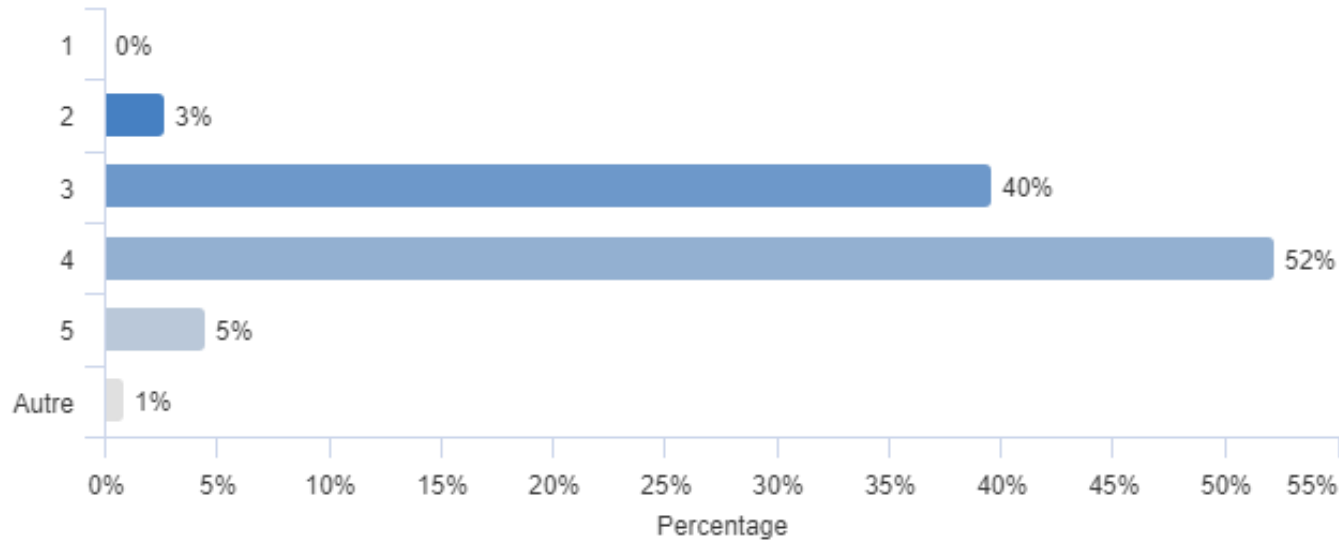
Annex 2: Sample Characteristics <u>Germany</u> (V): size of hotels

How many rooms does your hotel have?

Effective responses: 244
Mean: 67.1
Min - Max: 5.0 - 2,510.0

Response rate: 97%
Median: 33.5
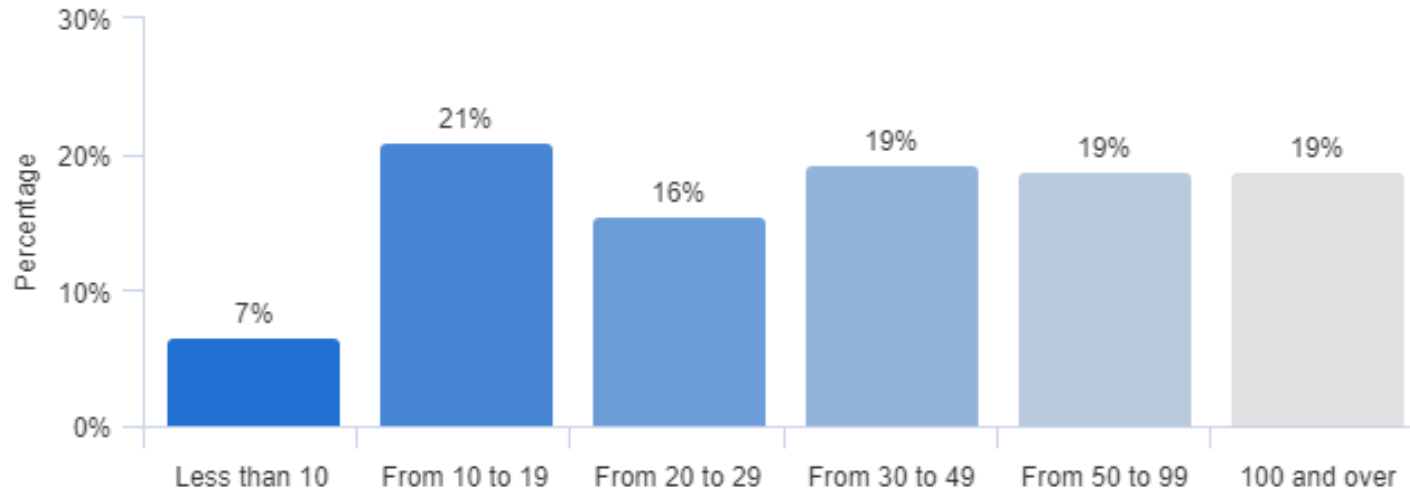
Annex 2: Sample Characteristics __Germany__ (VI): number of staff

How many people work in your hotel (average number of full-time employees)?

Effective responses: 245

Mean: 23.5

Min - Max: 1.0 - 195.0

Response rate: 97%

Median: 12.0
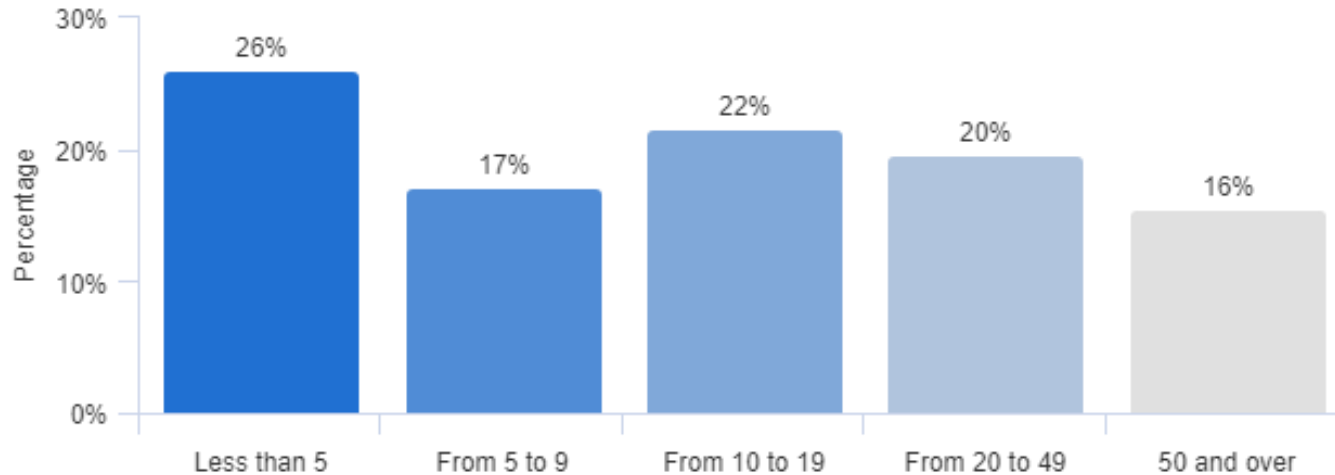
Is your hotel part of a hotel chain or a hotel cooperation?

Effective responses: 250

Response rate: 99%
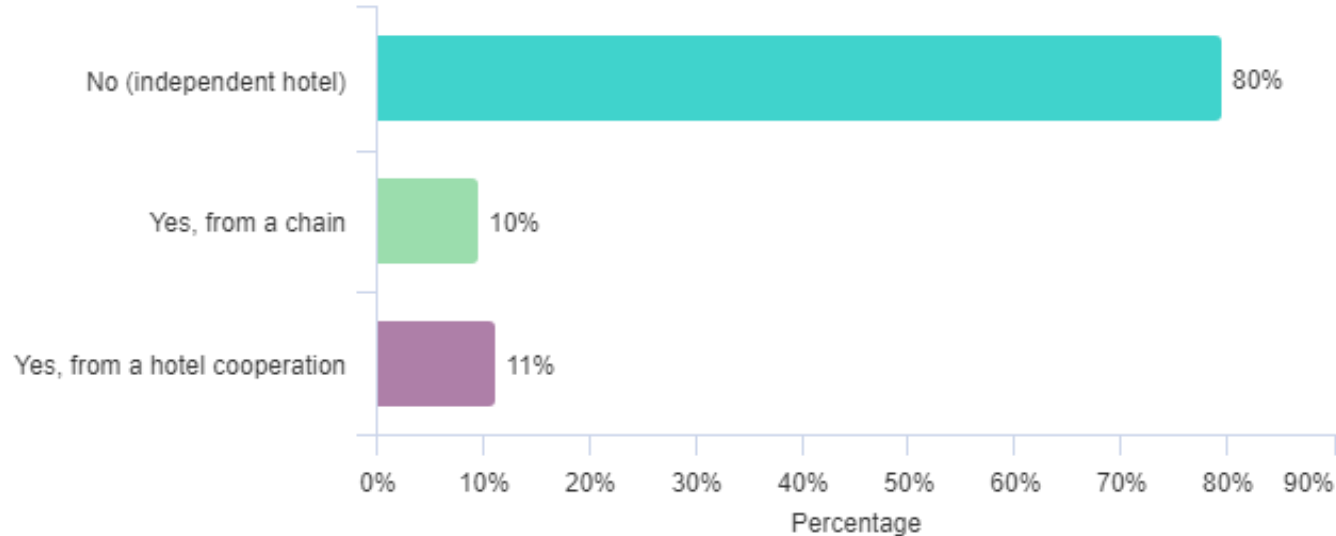
Summary of overall sample characteristics for Germany

Location
German hotels are geographically diverse, with 37% located in the countryside, followed by a strong presence in small (27%) and large cities (23%), and a notable 13% in seaside areas.

Customer Segments
The market is almost evenly split between leisure (48%) and business travelers (43%), with MICE and other segments accounting for less than 10%.

Classification and Star Rating
Just over half of the hotels (53%) are officially classified, most of which are 4-star (52%) or 3-star (40%) establishments.

Size and Staff
Hotels are relatively mid-sized, with an average of 67 rooms and of 23 full-time employees; staffing levels vary widely, from under 5 to over 50 employees.

Type of Hotel
The vast majority (80%) are independent hotels, with only 21% affiliated with chains or cooperations.

The German sample represents a structurally balanced and operationally mature landscape, with a blend of rural and urban settings. The high percentage of both leisure and business clients suggests versatility, while the notable presence of 4-star hotels and higher room capacities indicates a competitive mid-to-upper market focus. Despite being mainly composed of independent hotels, the relatively even staff and size distribution across segments points to professionalized operations even beyond chain affiliation.
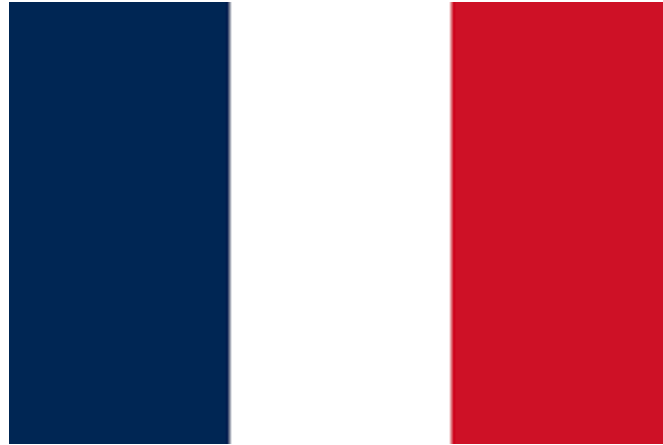
What is the location of your hotel?

Effective responses: 310   *Response rate: 100%*

Location	Percentage
Big city (more than 50'000 inhabitants)	29%
Village in countryside	29%
Little city (between 10'000 and 50'000 inhabitants)	26%
Seaside	14%
Mountain resort	5%
Other	1%

Percentage
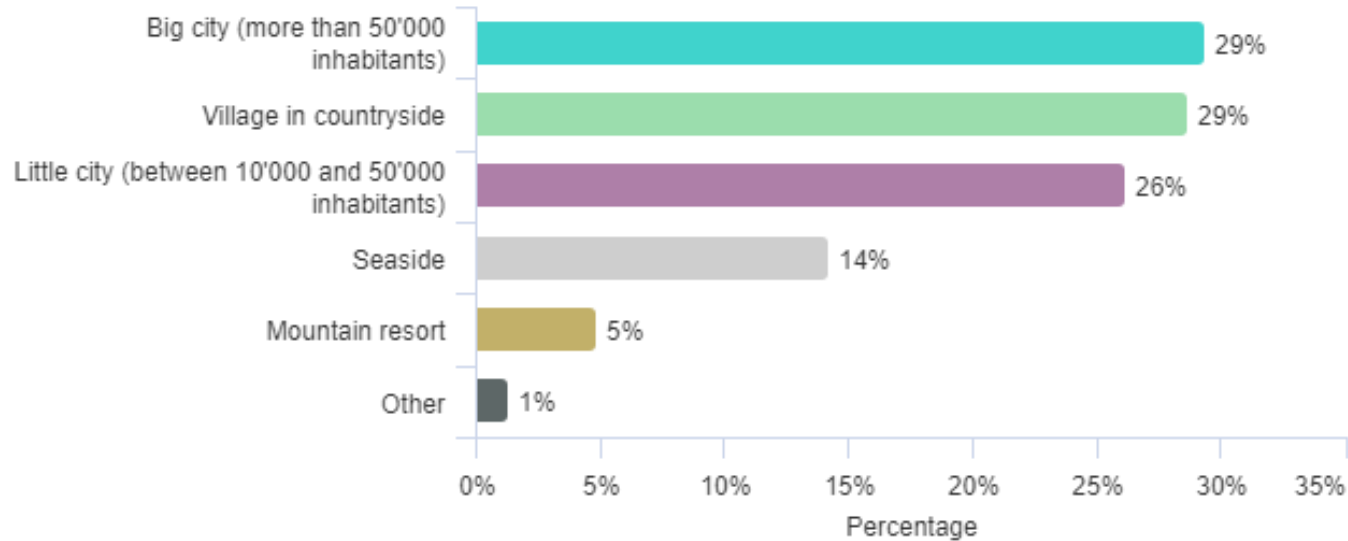
Annex 2: Sample Characteristics <u>France</u> (II): customer segments

What is your main customer segment?
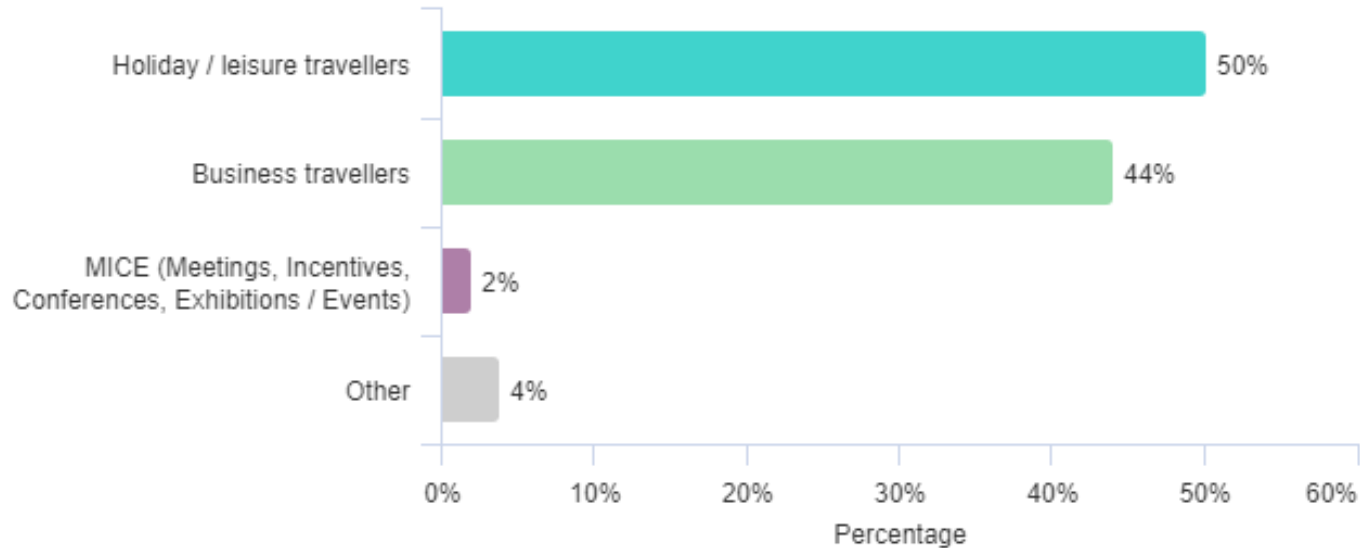
Effective responses: 309

Response rate: 100%

Is your hotel officially classified (star category)?

Effective responses: 289

Response rate: 93%
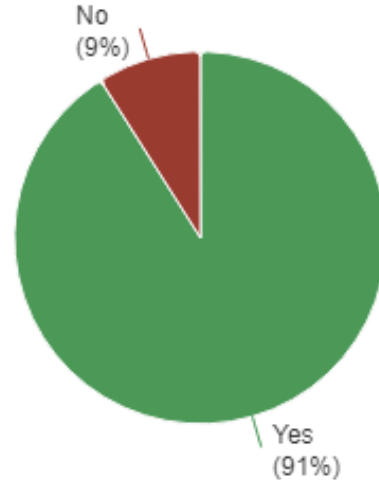
No
(9%)

Yes
(91%)

If yes, what is the star rating of your hotel?

Effective responses: 262   Response rate: 85%

Annex 2: Sample Characteristics <u>France</u> (V): size of hotels

How many rooms does your hotel have?

Effective responses: 302
Mean: 44.2
Min - Max: 6.0 - 218.0

Response rate: 97%
Median: 32.0
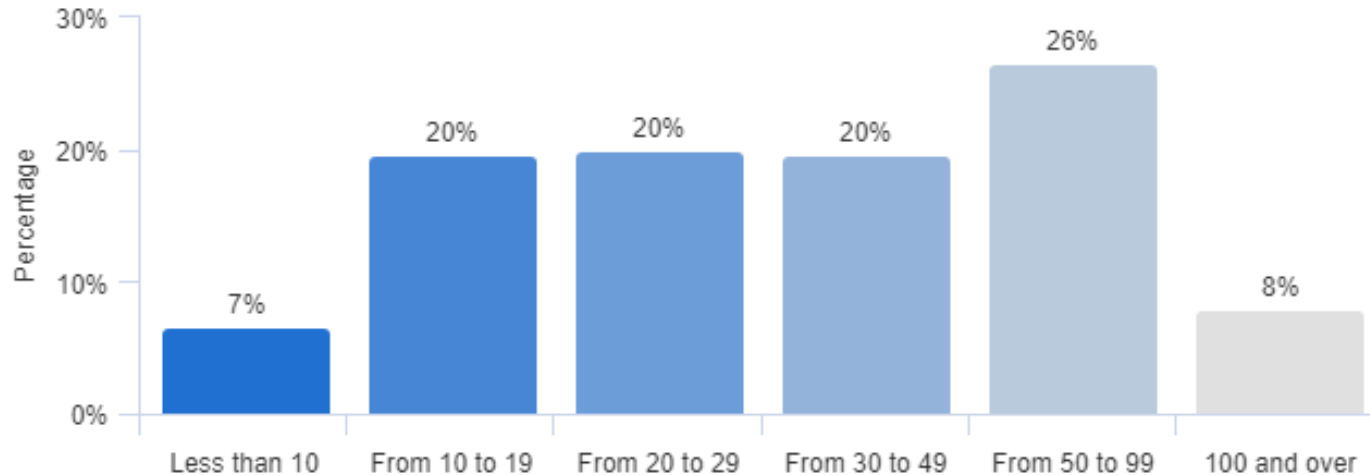
Annex 2: Sample Characteristics <u>France</u> (VI): number of staff

How many people work in your hotel (average number of full-time employees)?

Effective responses: 304
Mean: 14.8
Min - Max: 1.0 - 150.0

Response rate: 98%
Median: 9.0
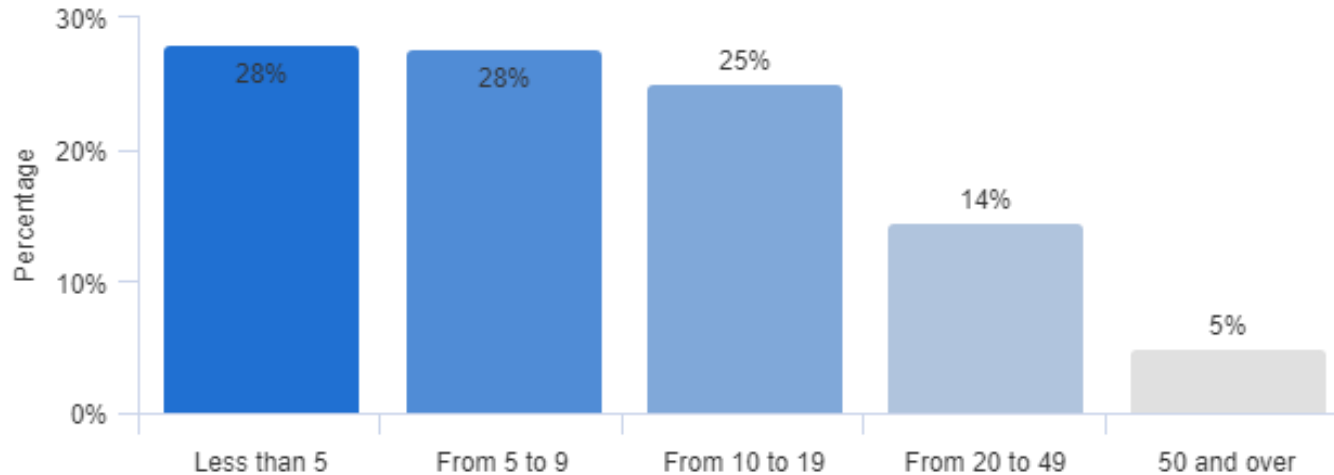
Annex 2: Sample Characteristics <u>France</u> (VII): type of hotel

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

Effective responses: 309   Response rate: 100%

- No (independent hotel): 61%
- Yes, from a chain: 24%
- Yes, from a hotel cooperation: 17%

Percentage
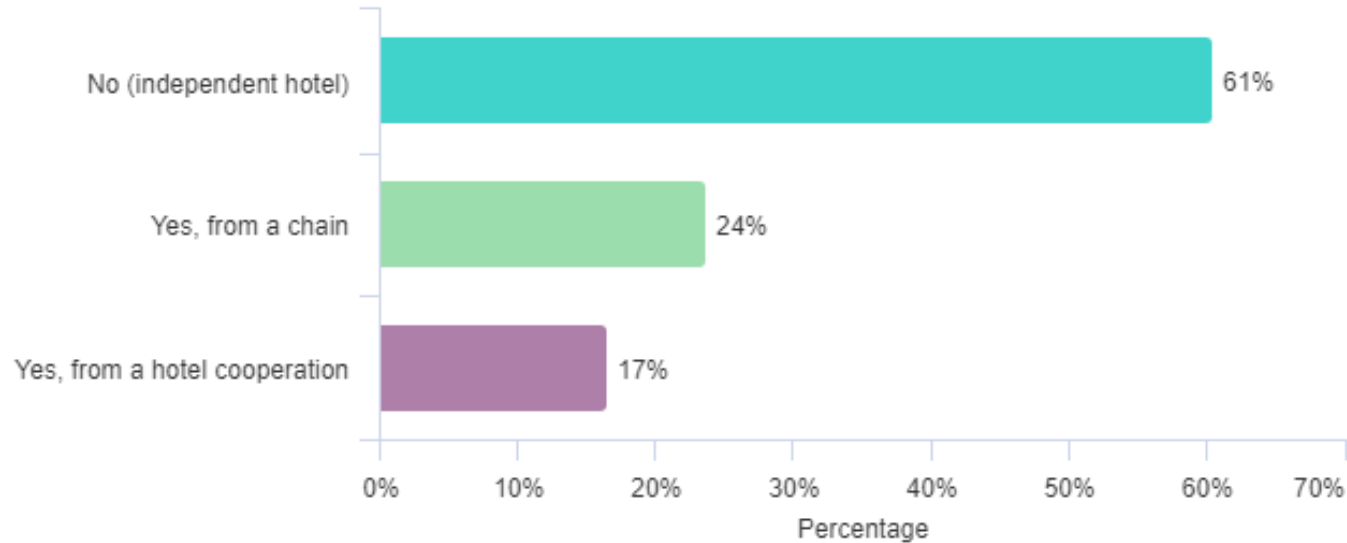
Summary of overall sample characteristics for France

Location
Hotels are equally distributed between big cities and countryside villages (29% each), followed closely by small cities (26%), with seaside (14%) and mountain resorts (5%) representing niche locations.

Customer Segments
The market is balanced between holiday/leisure travelers (50%) and business travelers (44%), with only 2% targeting the MICE segment and 4% citing other niches.

Classification and Star Rating
An overwhelming majority (91%) of hotels are officially classified; among these, 49% are 3-star, 25% are 4-star, 22% are 2-star, and only 3% are 5-star establishments.

Size and Staff
The median number of rooms is 32, with a slight concentration (26%) in the 50–99 room range; staffing is modest, with a median of 9 full-time employees and over half of hotels employing fewer than 10 staff.

Type of Hotel
A majority of French hotels in the sample are independent (61%), while 24% are part of a chain and 17% belong to a hotel cooperation.

The French hotel sample reflects a highly diverse landscape, both in terms of location and market positioning. Hotels are almost evenly split across urban, rural, and small-town areas, and they serve both leisure and business clientele in similar proportions. While most hotels are officially classified, they tend to operate in the mid-range category (2–4 stars), with relatively small team sizes and a predominance of independent ownership, indicating a fragmented yet structured market

What is the location of your hotel?

Effective responses: 454

Response rate: 100%

| Location	Percentage
Seaside	39%
Village in countryside	23%
Little city (between 10'000 and 50'000 inhabitants)	16%
Big city (more than 50'000 inhabitants)	14%
Mountain resort	4%
Other	4%

Annex 2: Sample Characteristics <u>Greece</u> (II): customer segments

What is your main customer segment?

Effective responses: 454

Response rate: 100%

Is your hotel officially classified (star category)?

Effective responses: 454
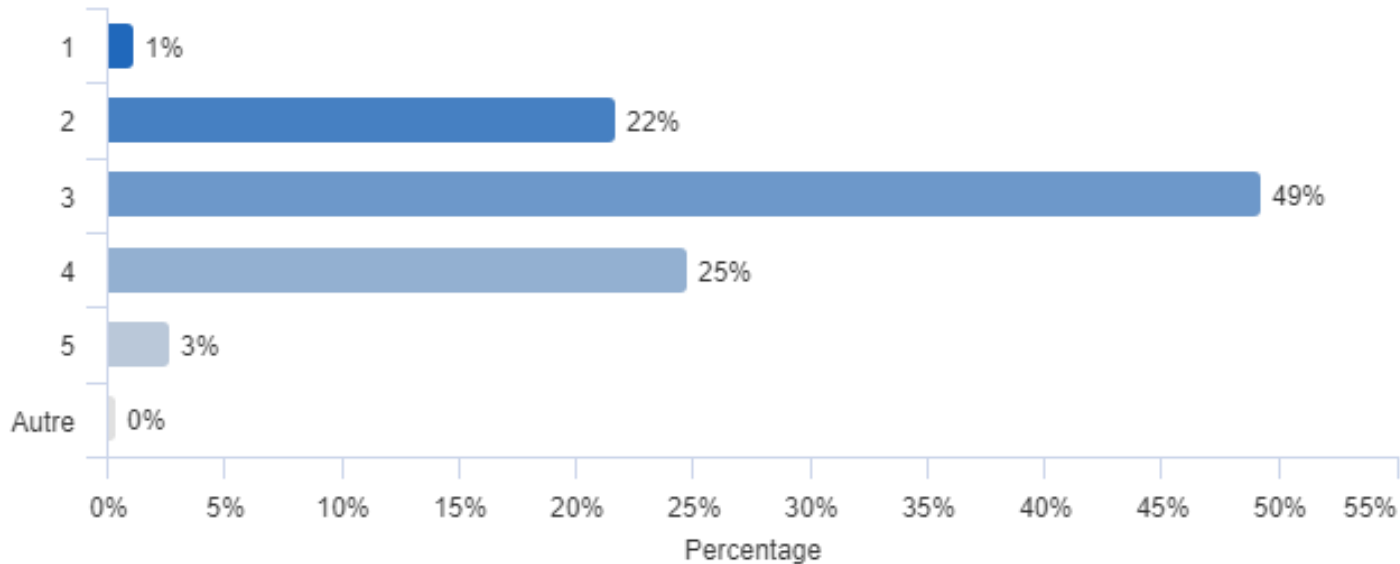
Response rate: 100%

No
(0%)

Yes
(100%)

Annex 2: Sample Characteristics <u>Greece</u> (IV): star rating

If yes, what is the star rating of your hotel?

Effective responses: 453 | Response rate: 100%
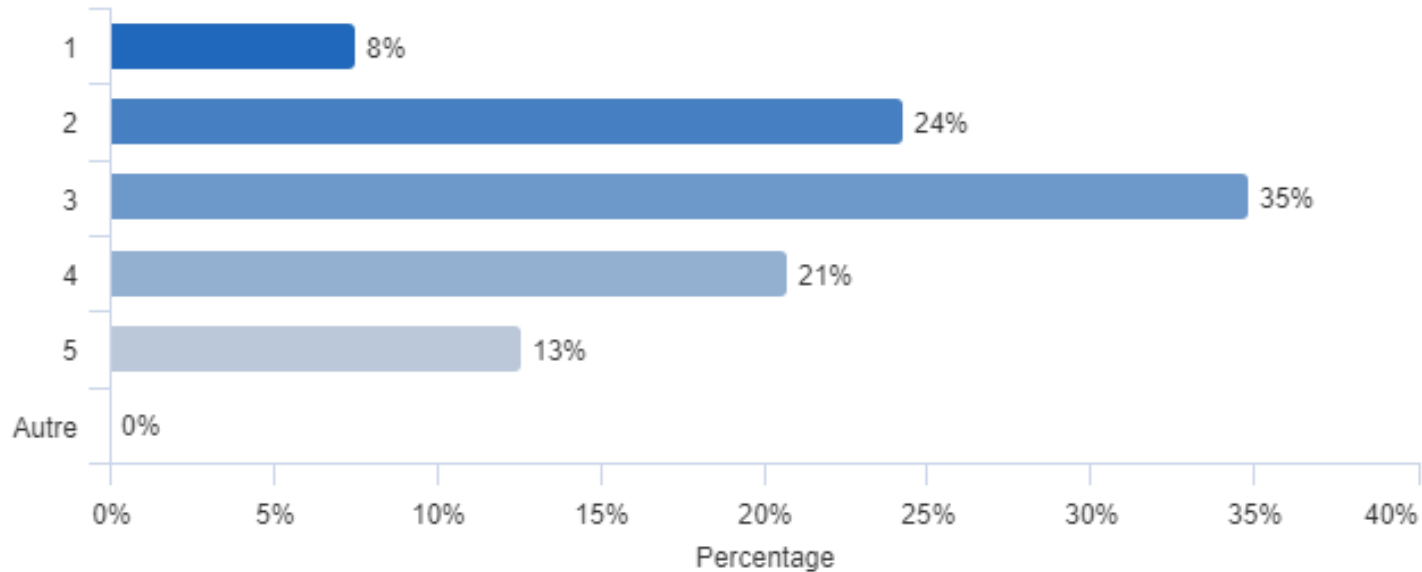
Star rating	Percentage
1	8%
2	24%
3	35%
4	21%
5	13%
Autre	0%

How many rooms does your hotel have?

Effective responses: 447
Mean: 61.7
Min - Max: 5.0 - 700.0

Response rate: 98%
Median: 30.0

Annex 2: Sample Characteristics __Greece__ (VI): number of staff

How many people work in your hotel (average number of full-time employees)?

Effective responses: 447

Response rate: 98%

Mean: 31.5

Median: 7.0

Min - Max: 0.5 - 740.0

Annex 2: Sample Characteristics **Greece** (VII): type of hotel

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

Effective responses: 454
Response rate: 100%

No (independent hotel)	91%
Yes, from a chain	9%
Yes, from a hotel cooperation	0%

Percentage
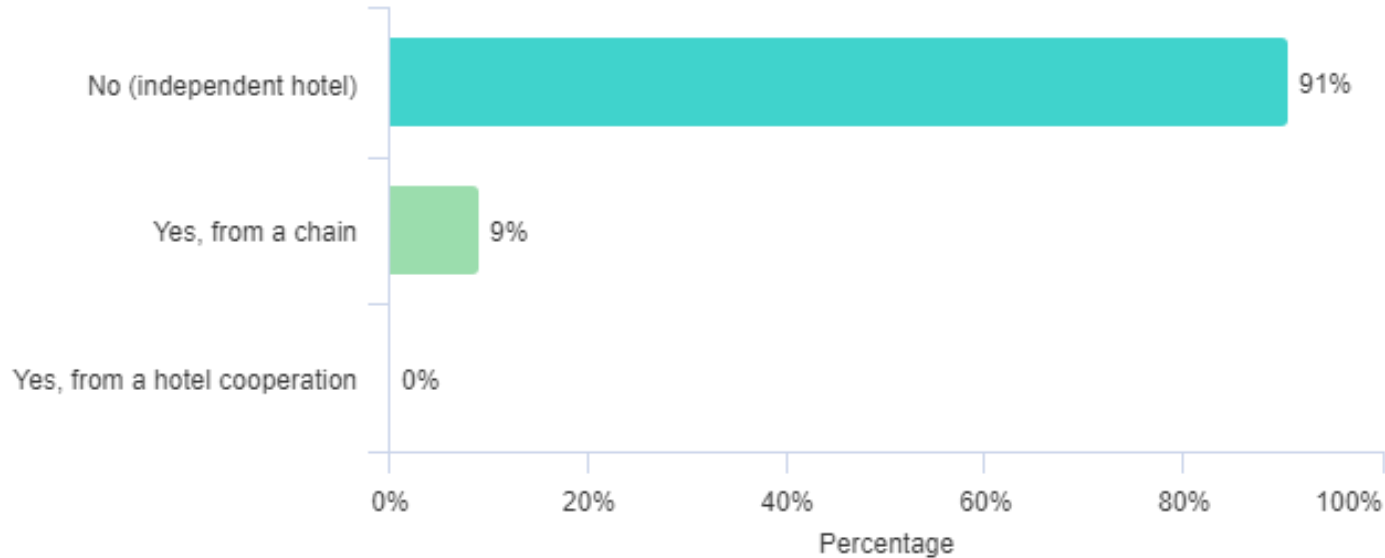
Summary of overall sample characteristics for Greece

Location
Hotels in Greece are predominantly located in seaside areas (39%), followed by villages in the countryside (23%), and smaller cities (16%).

Customer Segments
The Greek hotel market is overwhelmingly oriented towards holiday/leisure travelers (91%), with only 7% focusing on business travel and negligible presence in MICE or other segments.

Classification and Star Rating
All surveyed hotels (100%) are officially classified; the majority fall into the 3-star (35%) and 2-star (24%) categories, followed by 4-star (21%) and 5-star (13%) properties.

Size and Staff
Hotels show varied sizes: 23% have 20–29 rooms and 21% have 10–19 rooms, with a median of 30 rooms. Staffing is lean, with 36% employing fewer than 5 full-time employees and a median of 7 FTE.

Type of Hotel
Greece's hotel landscape is dominated by independent establishments, which account for 91% of the sample, with minimal representation from chains (9%) and none from cooperations.

The Greek sample reflects a tourism model heavily anchored in leisure-oriented, seaside, and independently operated hotels, with smaller team sizes and mostly 2- to 4-star classifications. Business travel and chain affiliations remain marginal.
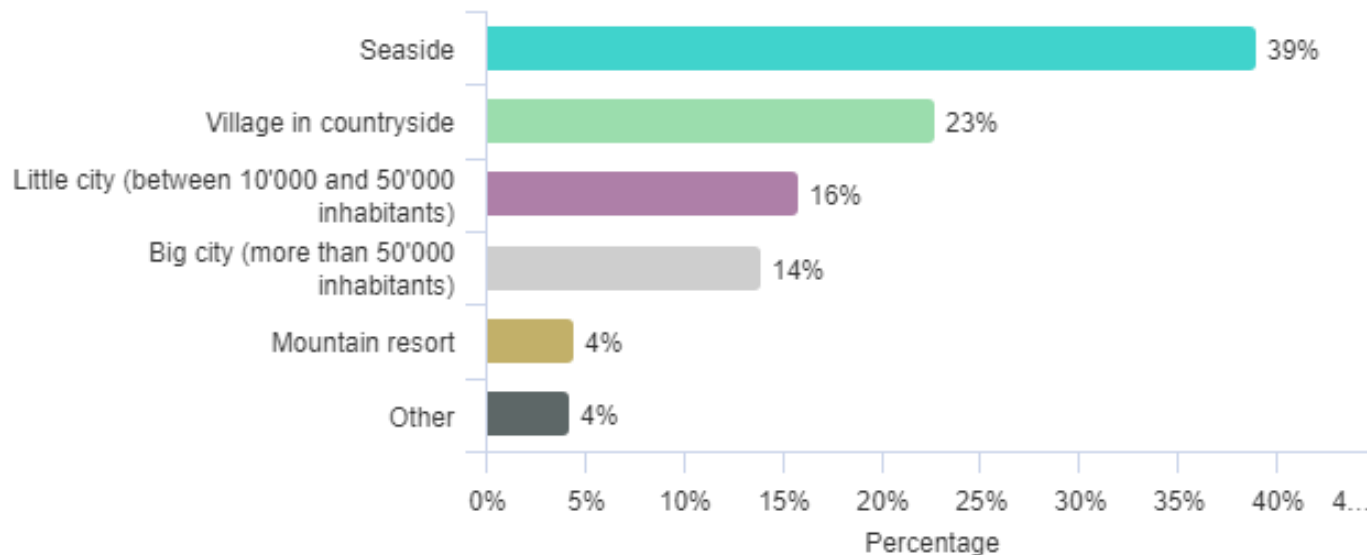
Annex 2: Sample Characteristics <u>Italy</u> (I): location

What is the location of your hotel?
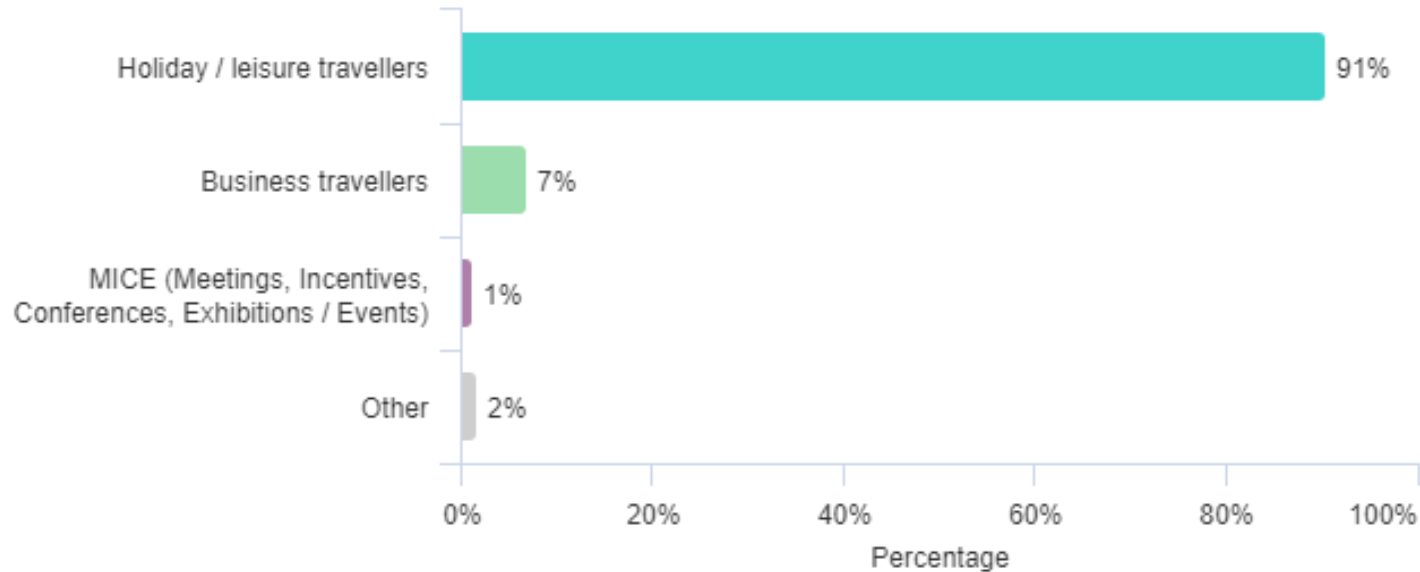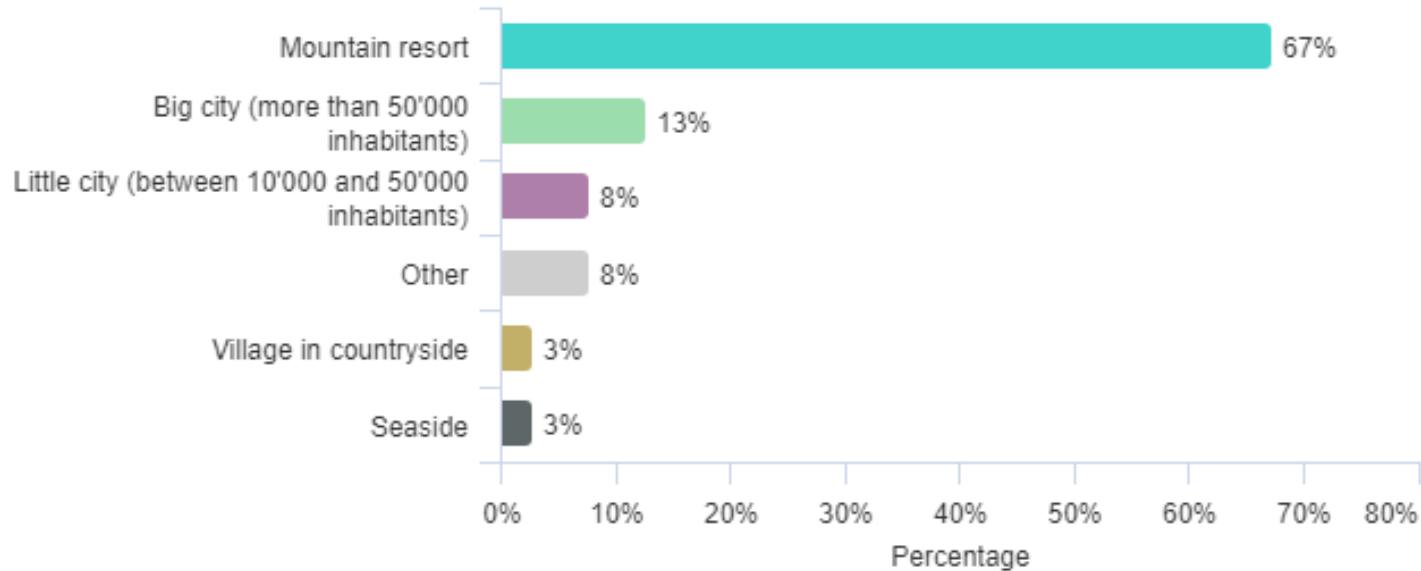
Effective responses: 141

Response rate: 100%

What is your main customer segment?

Effective responses: 139

Response rate: 99%
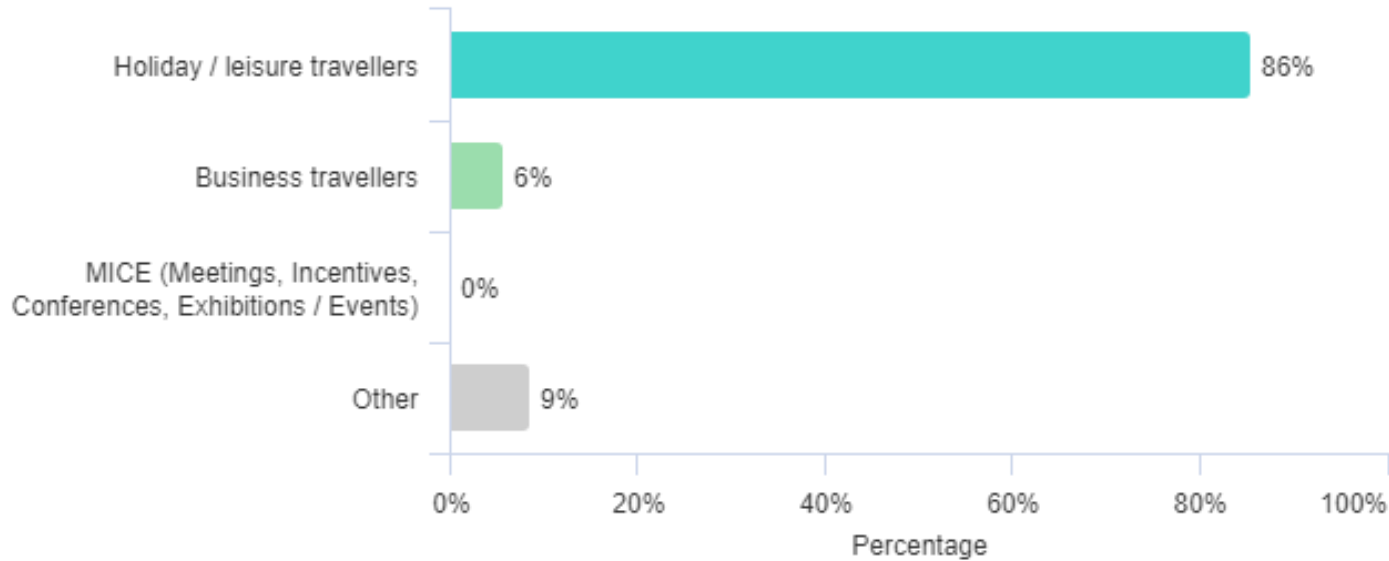
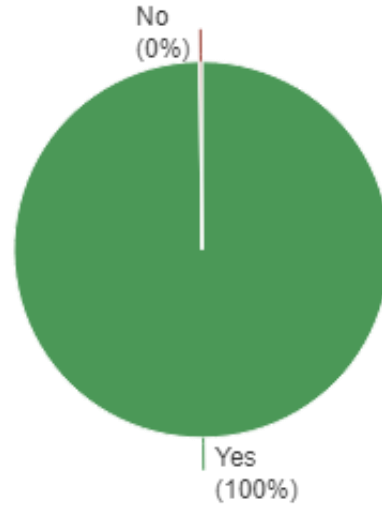# Annex 2: Sample Characteristics Italy (III): classification

Is your hotel officially classified (star category)?

Effective responses: 128

Response rate: 91%

No
(8%)

Yes
(92%)
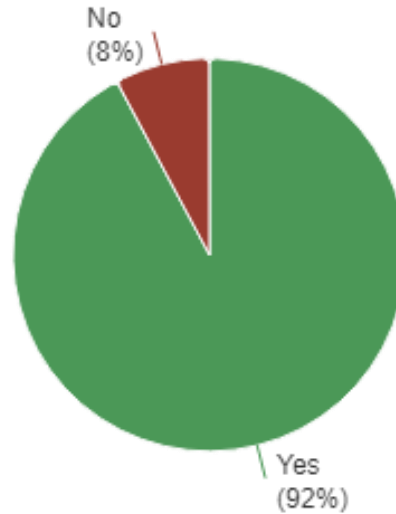
Annex 2: Sample Characteristics <u>Italy</u> (IV): star rating

If yes, what is the star rating of your hotel?

Effective responses: 118   *Response rate: 84%*
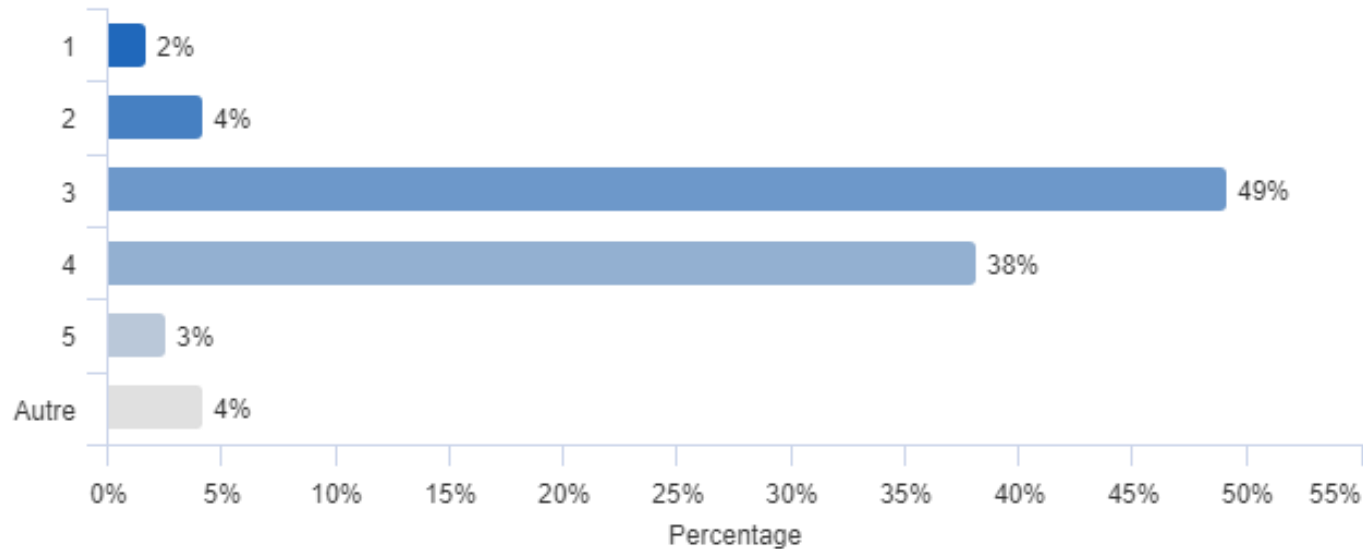
Annex 2: Sample Characteristics <u>Italy</u> (V): size of hotels

How many rooms does your hotel have?

Effective responses: 133
Mean: 45.3
Min - Max: 5.0 - 346.0

Response rate: 94%
Median: 35.0
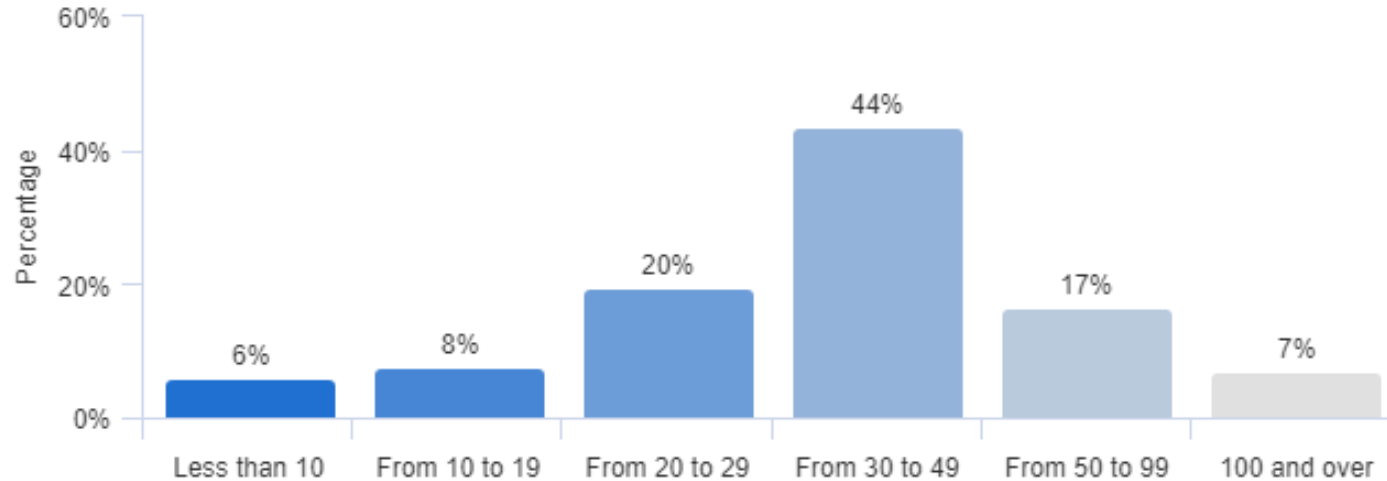
Annex 2: Sample Characteristics <u>Italy</u> (VI): number of staff

How many people work in your hotel (average number of full-time employees)?
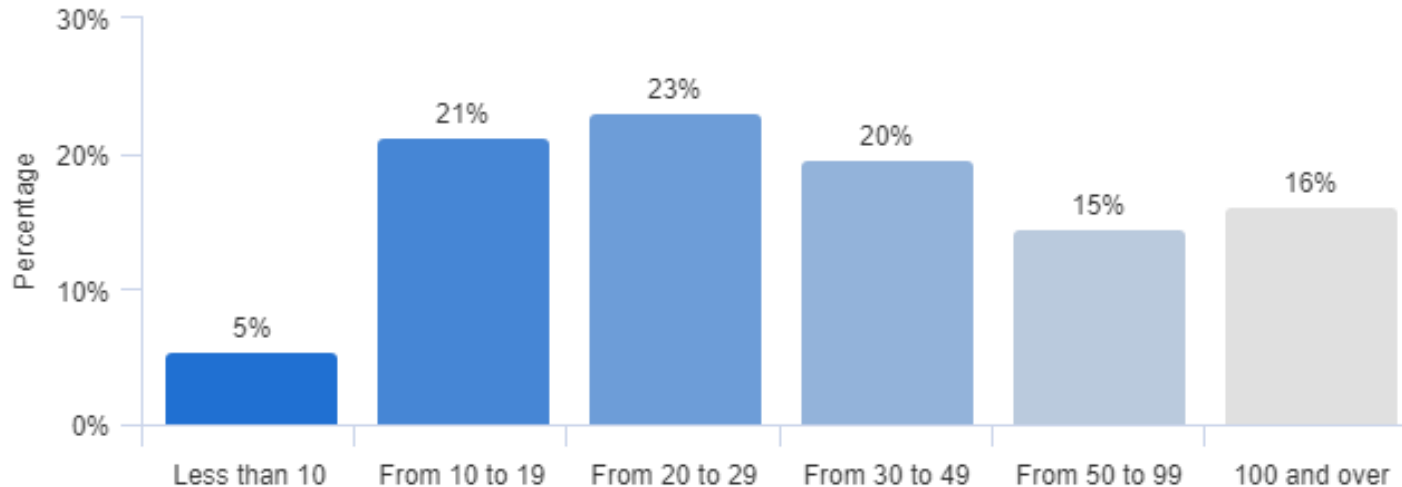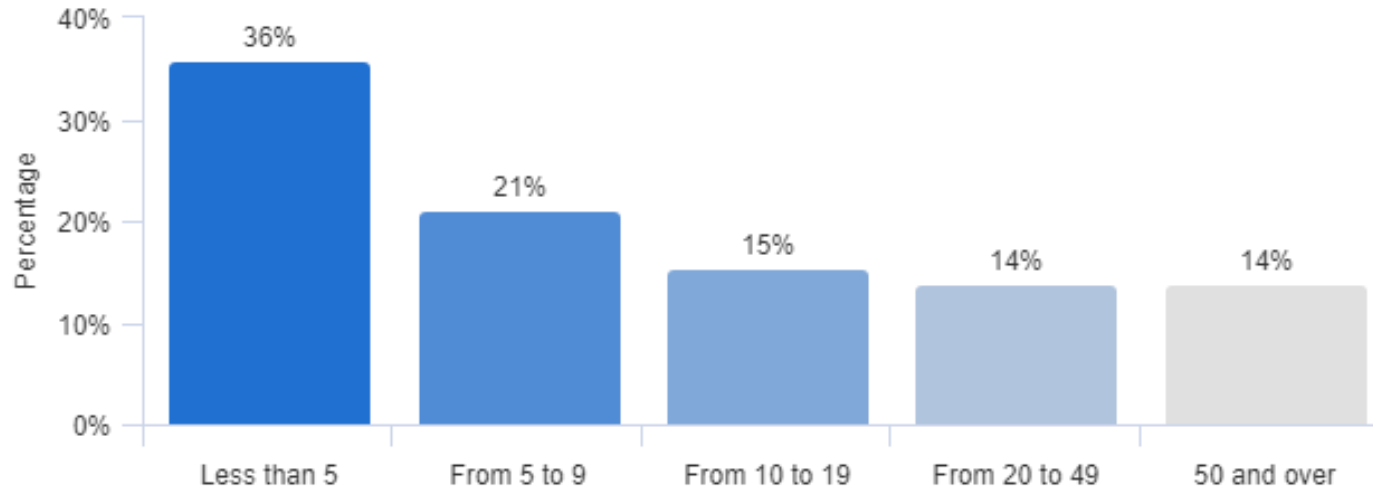
Effective responses: 136

Mean: 19.2

Min - Max: 1.0 - 120.0

Response rate: 96%

Median: 12.0
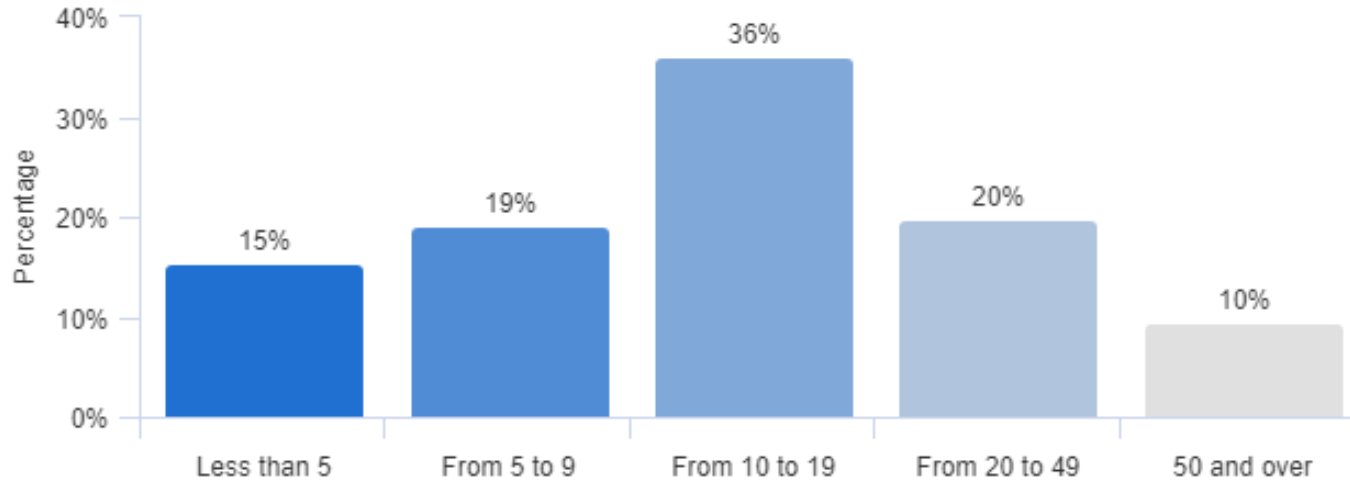
Annex 2: Sample Characteristics <u>Italy</u> (VII): type of hotel

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

Effective responses: 140   Response rate: 99%
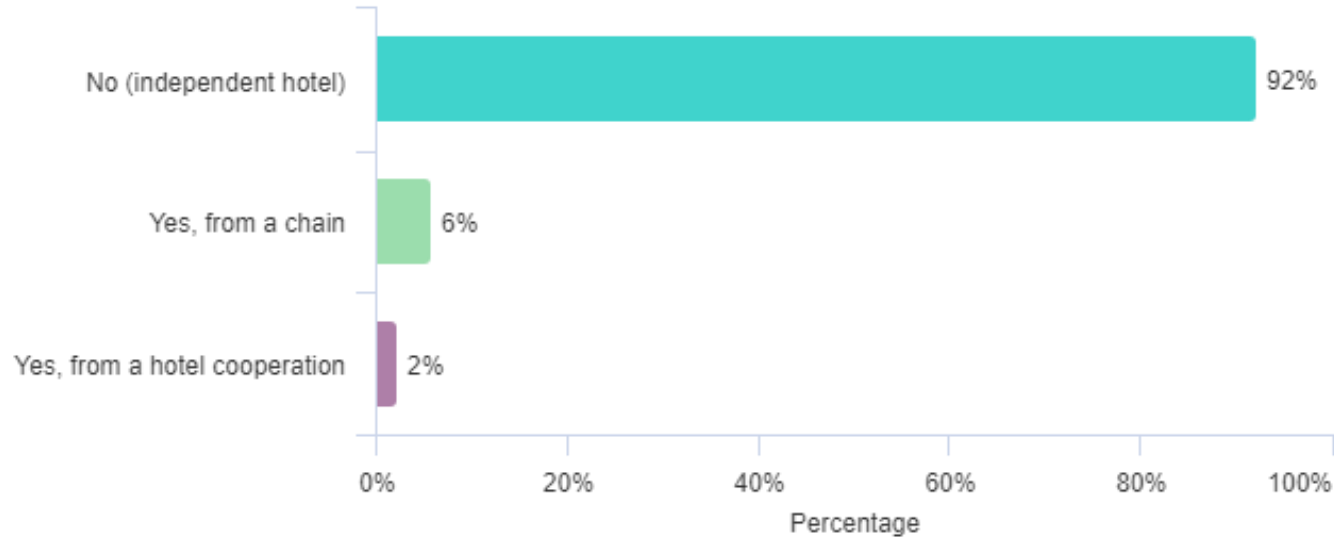
Summary of overall sample characteristics for Italy

Location
Mountain destinations dominate the Italian sample, with 67% of hotels located in mountain resorts. Urban locations are much less represented, with 13% in big cities and 8% in small cities.

Customer Segments
The vast majority of hotels (86%) cater primarily to holiday and leisure travelers, while business tourism is marginal (6%) and MICE is virtually absent.

Classification and Star Rating
92% of hotels are officially classified. Among them, 49% are 3-star and 38% are 4-star, while only 3% reach 5 stars.

Size and Staff
Most hotels are mid-sized: 44% have 30–49 rooms and the median is 35 rooms. Regarding staff, 36% of establishments employ 10–19 full-time employees, with a median of 12 FTE.

Type of Hotel
Independent hotels make up 92% of the sample, with very limited representation from chains (6%) or cooperations (2%).

The Italian hotel sample, largely sourced via the Trentino hotel association, is strongly skewed toward independent, mountain-based leisure hotels with official classification. These mid-sized businesses are mostly family-run or locally operated, focusing on tourism rather than business segments.
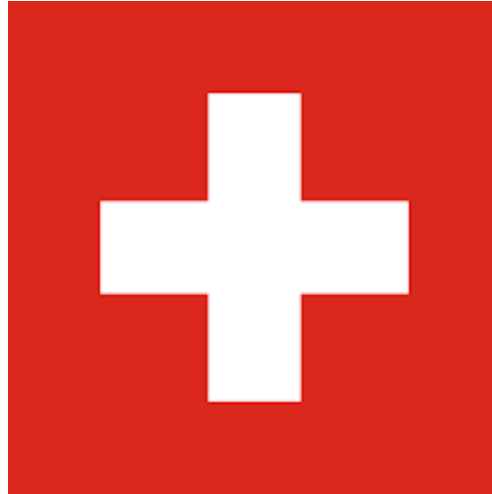
Annex 2: Sample Characteristics <u>Switzerland</u> (I): location

What is the location of your hotel?

Effective responses: 199　　　　　　　*Response rate: 100%*

Location	Percentage
Mountain resort	48%
Village in countryside	24%
Big city (more than 50'000 inhabitants)	16%
Little city (between 10'000 and 50'000 inhabitants)	13%
Other	5%
Seaside	0%

Percentage
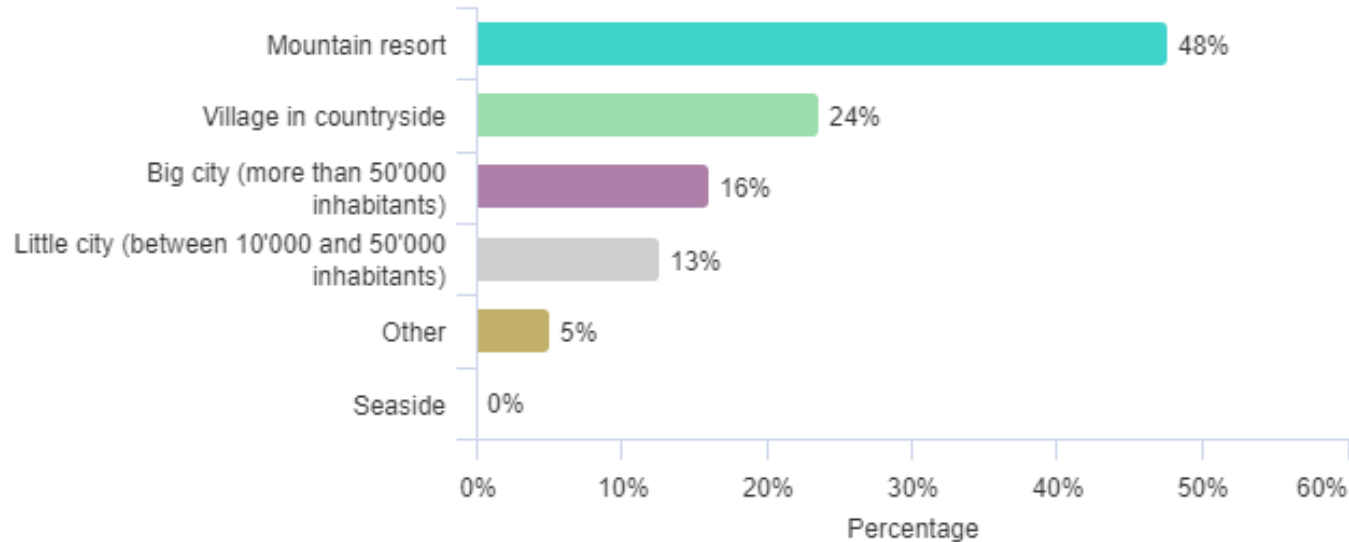
Annex 2: Sample Characteristics __Switzerland__ (II): customer segments

What is your main customer segment?

Effective responses: 196   *Response rate: 98%*

Segment	Percentage
Holiday / leisure travellers	67%
Business travellers	21%
MICE (Meetings, Incentives, Conferences, Exhibitions / Events)	4%
Other	8%
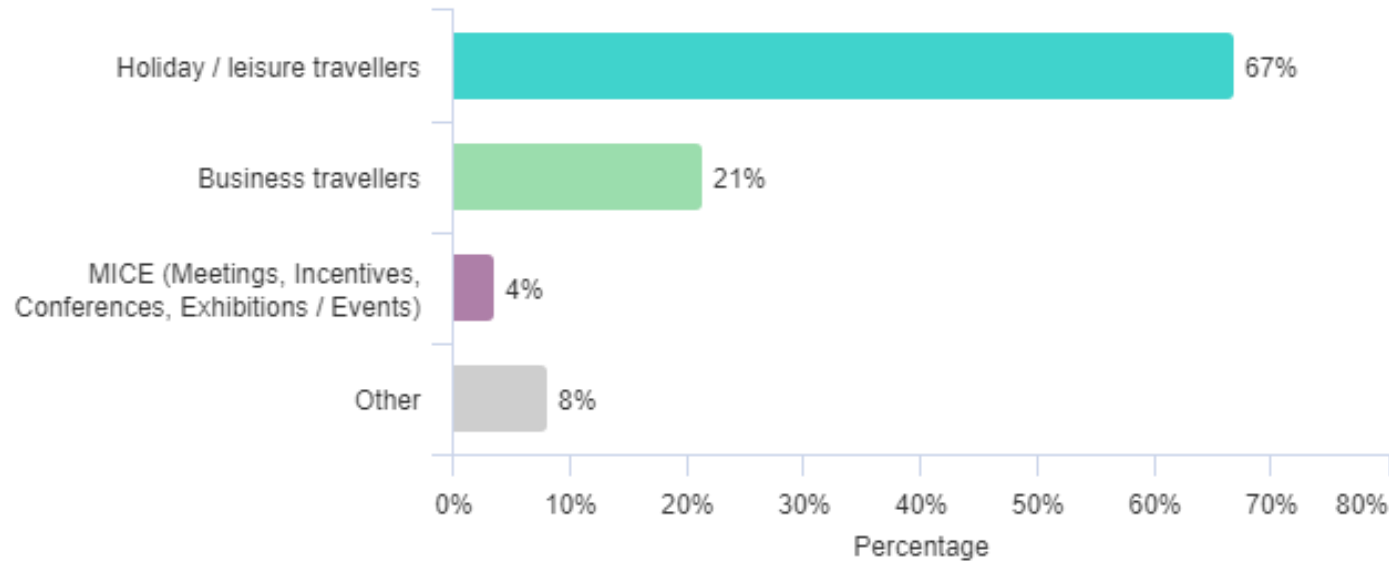
Annex 2: Sample Characteristics <u>Switzerland</u> (III): classification

Is your hotel officially classified (star category)?

Effective responses: 162

Response rate: 81%

No
(33%)

Yes
(67%)
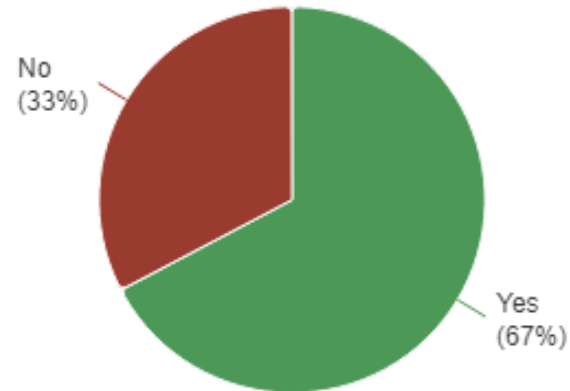
Annex 2: Sample Characteristics Switzerland (IV): star rating

If yes, what is the star rating of your hotel?

Effective responses: 109   Response rate: 55%
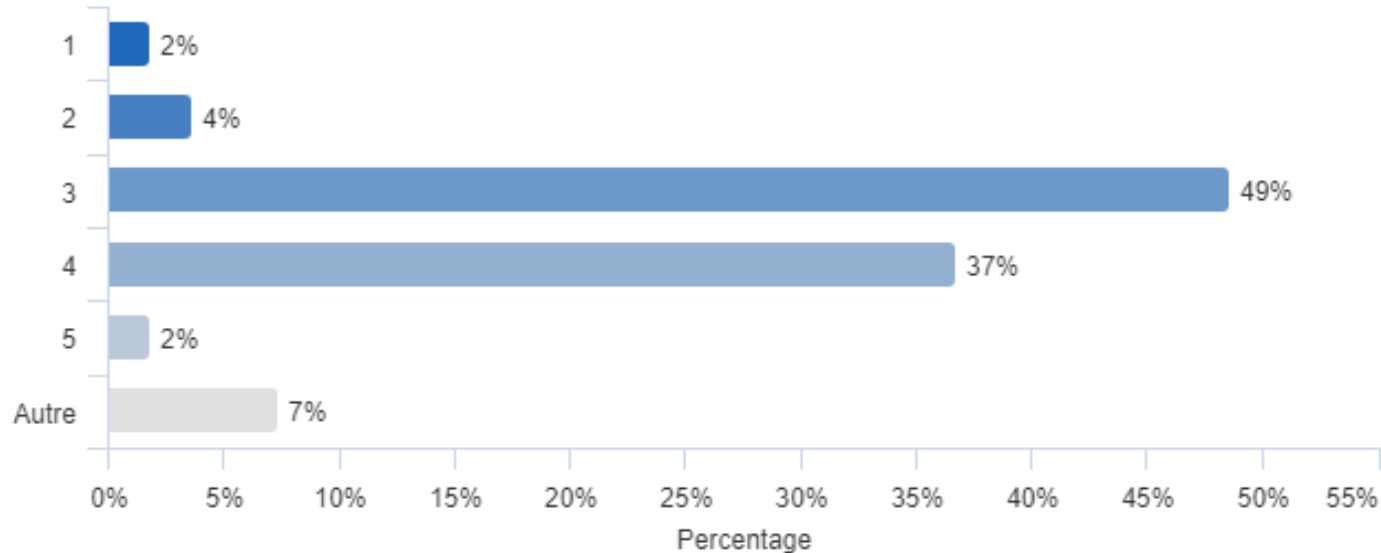
Annex 2: Sample Characteristics <u>Switzerland</u> (V): size of hotels

How many rooms does your hotel have?

Effective responses: 190
Mean: 34.2
Min - Max: 5.0 - 168.0

Response rate: 95%
Median: 24.0
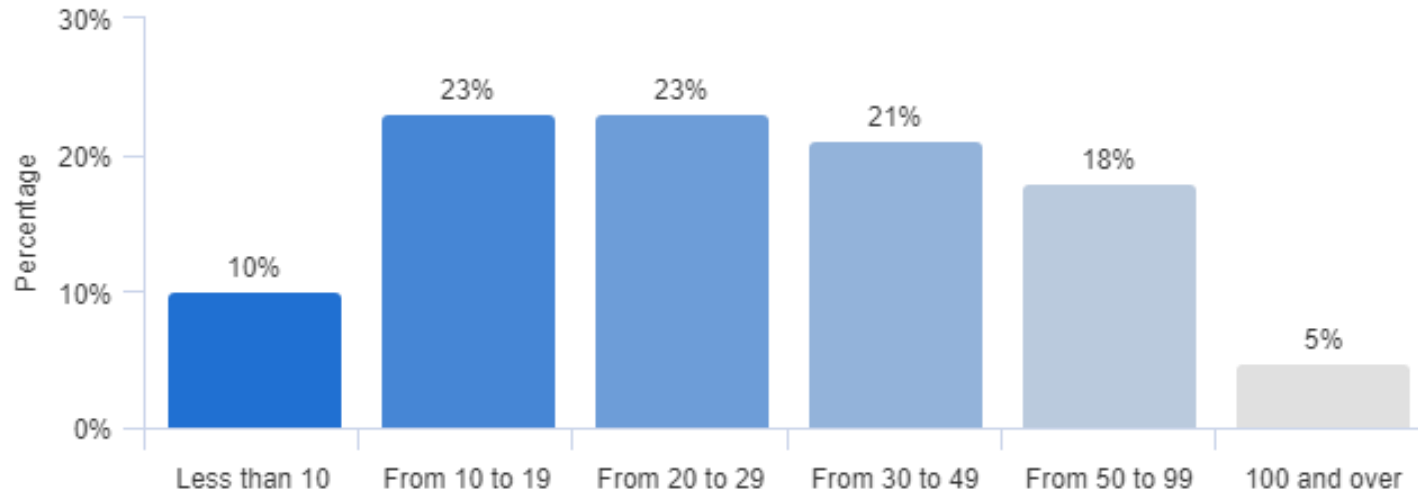
Annex 2: Sample Characteristics __Switzerland__ (VI): number of staff

How many people work in your hotel (average number of full-time employees)?

Effective responses: 189

Response rate: 95%

Mean: 20.0

Median: 11.0

Min - Max: 1.0 - 350.0
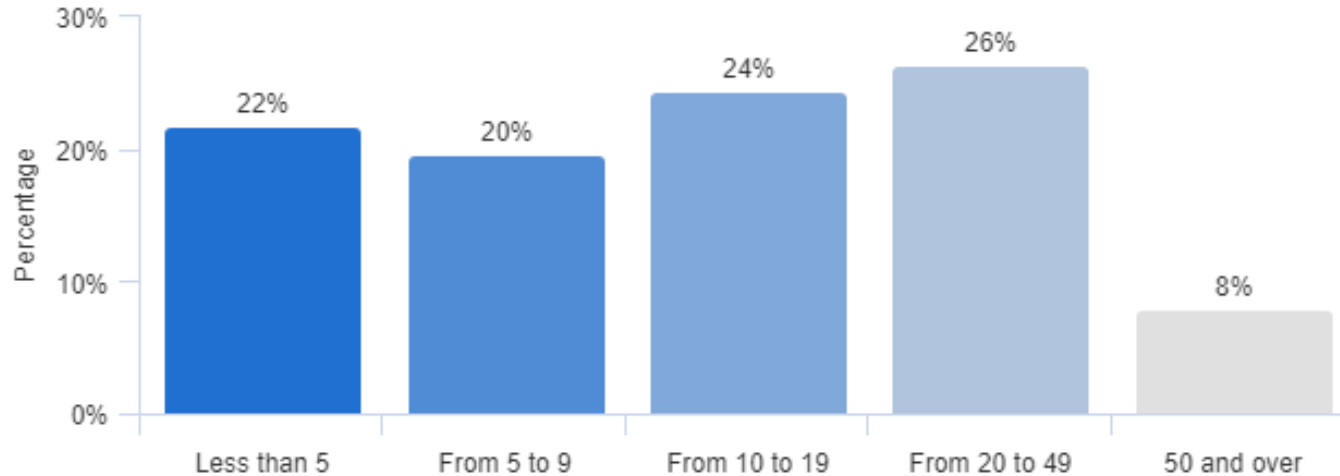
Annex 2: Sample Characteristics <u>Switzerland</u> (VII): type of hotel

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

Effective responses: 191   *Response rate: 96%*
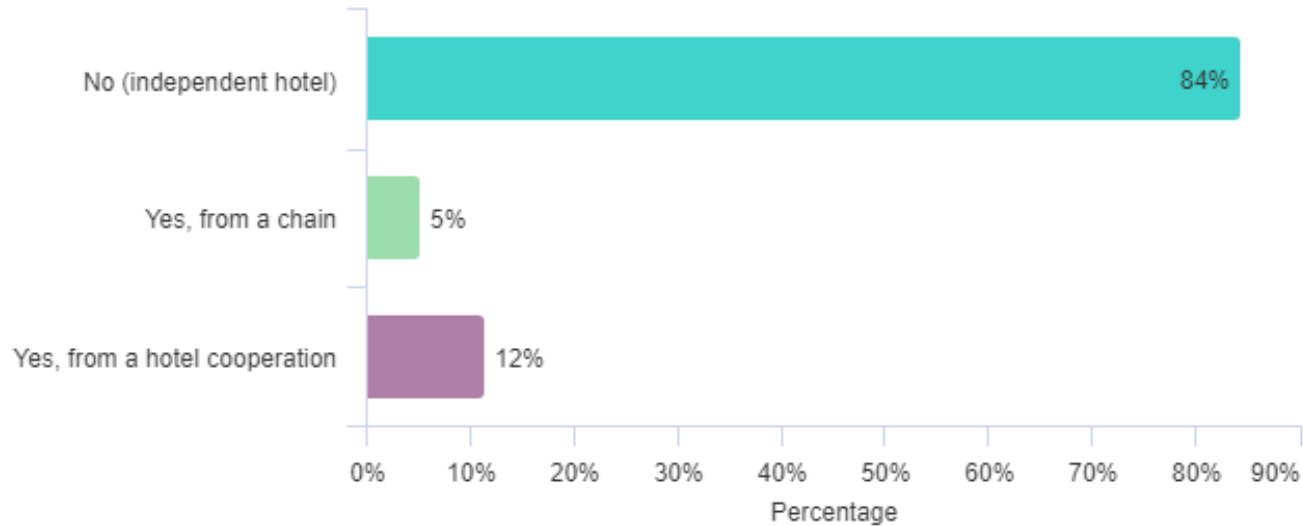
Summary of overall sample characteristics for Switzerland

Location

Nearly half of the hotels (48%) are located in mountain resorts, followed by 24% in countryside villages and 16% in big cities.

Customer Segments

The majority cater to holiday/leisure travelers (67%), while 21% focus on business travelers and 4% on MICE.

Classification and Star Rating

67% of hotels are officially classified, with 49% rated 3 stars and 37% 4 stars.

Size of Hotels

Room numbers are modest, with a median of 24 and most hotels having between 10 and 49 rooms (67% combined).

Staffing

The median staff size is 11 FTEs; 46% of hotels have fewer than 10 employees.

Type of Hotel

Independent hotels dominate the market (84%), while only 5% belong to chains and 12% to cooperations.

The Swiss hotel sample is predominantly composed of independent mountain hotels catering to leisure guests, often small in size and staff. A majority are officially classified, especially in the mid-range 3- and 4-star categories.

> **Annex 3: Survey Resultats by Country**

Annex 3: Survey Results for Austria

Annex 3: Survey Results for <u>Austria:</u> Revenue Management Strategy

Does your hotel currently implement a revenue management strategy?

Effective responses: 119

Response rate: 92%

Annex 3: Survey Results for <u>Austria:</u> Tools for Revenue Management Strategy Support

If yes, what tools or systems do you use to support your revenue management decisions? (select all that apply)

Effective responses: 50   *Response rate: 39%*
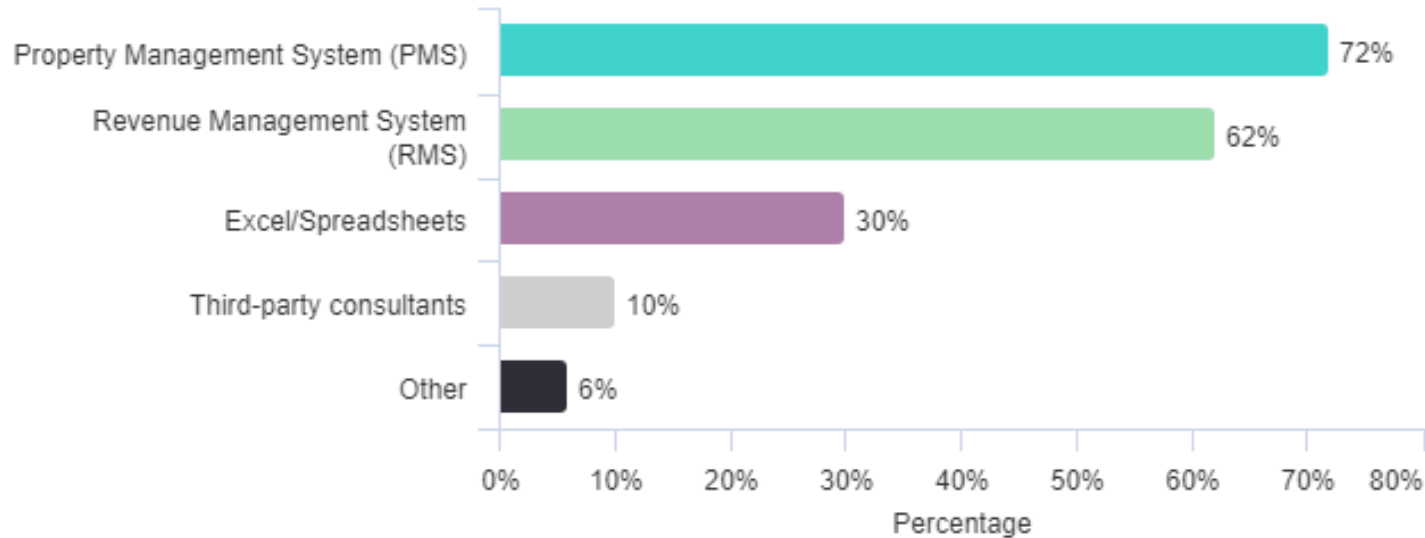
Annex 3: Survey Results for <u>Austria</u>: Use of KPIs

Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel's performance? (select all that apply)

KPI	Percentage
Occupancy Rate (room)	81%
Average Daily Rate (ADR)	52%
Total Gross Operating Profit (TGOP)	50%
Revenue per Available Room (RevPAR)	48%
Total Revenue Per Available Room (TRevPAR)	43%
Average Length of Stay (ALOS)	42%
Customer Satisfaction Score	42%
Gross Operating Incom Rooms (GOI Rooms)	41%
Direct Booking Ratio	34%
Gross Operating Income F+B (GOI F+B)	29%
Revenue Per Occupied Room (RevPOR)	27%
EBITDA Margin	22%
Labor Cost Ratio	21%
Net Average Daily Rate (NetADR)	18%
Energy Consumption Per Occupied Room	16%
Gross Operating Profit per Available Room (GOPPAR)	12%
Staff Retention Rate	12%
Customer Acquisition Cost (CAC)	8%
Percentage of Renewable Energy Used	7%
Local Sourcing / Procurement Percentage	5%
Revenue Per Square Meter/Foot (RevPAM)	4%

Non-responses are ignored when calculating the percentage.

Annex 3: Survey Results for <u>Austria:</u> Self-Perception of Competitive Position (Revenue and Market Share)

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

Effective responses: 118   *Response rate: 91%*

- Significantly better — 10%
- Slightly better — 31%
- About the same — 34%
- Slightly worse — 9%
- Significantly worse — 4%
- Do not know — 12%

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

Effective responses: 118   *Response rate: 91%*

- Much higher profitability — 6%
- Somewhat higher profitability — 32%
- Similar profitability — 35%
- Somewhat lower profitability — 8%
- Much lower profitability — 5%
- Do not know — 14%

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

Effective responses: 118   *Response rate: 91%*

- Leading in market share — 4%
- Slightly above average — 27%
- On par with competitors — 39%
- Slightly below average — 14%
- Losing market share significantly — 3%
- Do not know — 12%
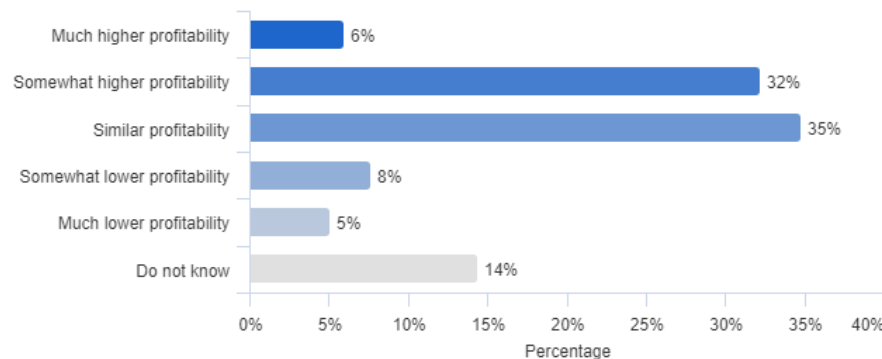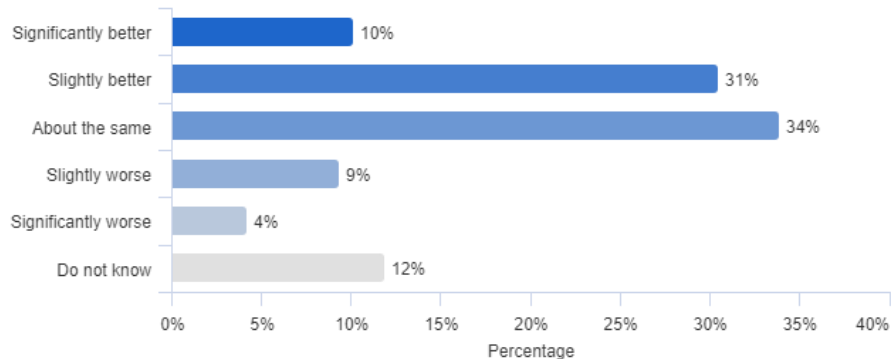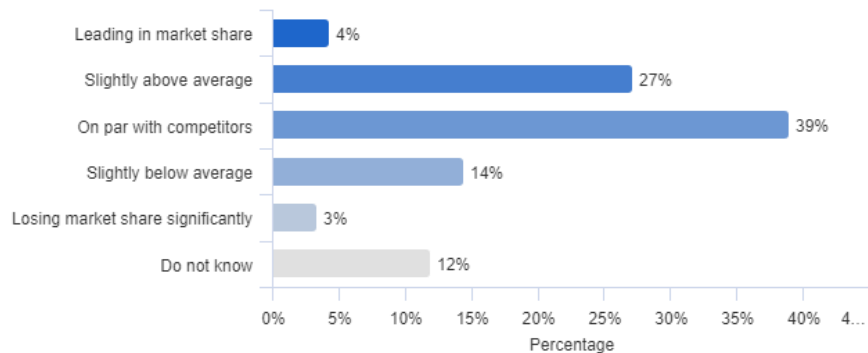
Annex 3: Survey Results for <u>Austria:</u> Decision-Making Orientation and Analytical Thinking in Hotel Management

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

Legend:
- Strongly Disagree=1
- 2
- 3
- 4
- 5
- 6
- Strongly agree=7

Data:

Statement	1	2	3	4	5	6	7
I consider multiple options before making a decision	3%	1%	3%	3%	16%	28%	47%
I consider all the available facts and information when attributing causes to behavior	2%	2%	6%	9%	23%	28%	31%
I often look at a situation from different viewpoints	3%	2%	5%	8%	15%	31%	36%
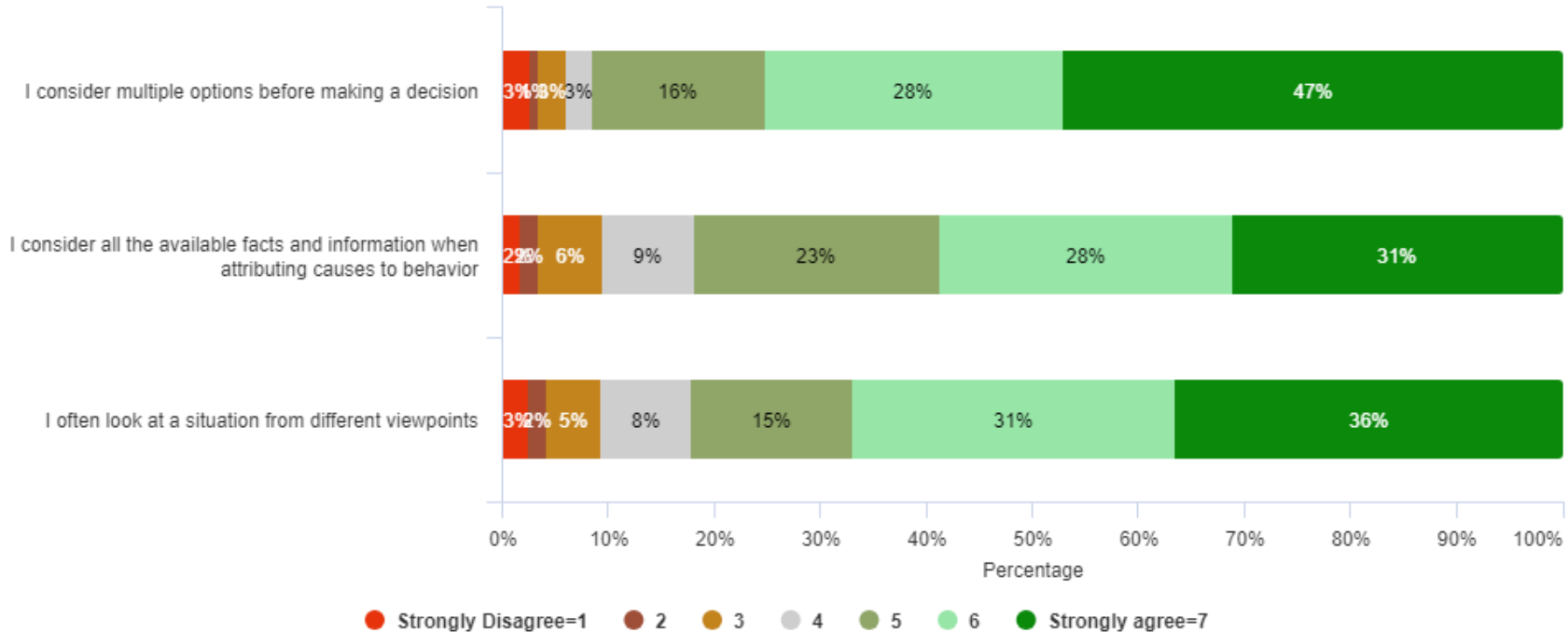
Annex 3: Survey Results for <u>Austria:</u> Technological Practices for Rate and Availability Management on Online Channels

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

Effective responses: 118 *Response rate: 91%*

Hes·so// VALAIS WALLIS
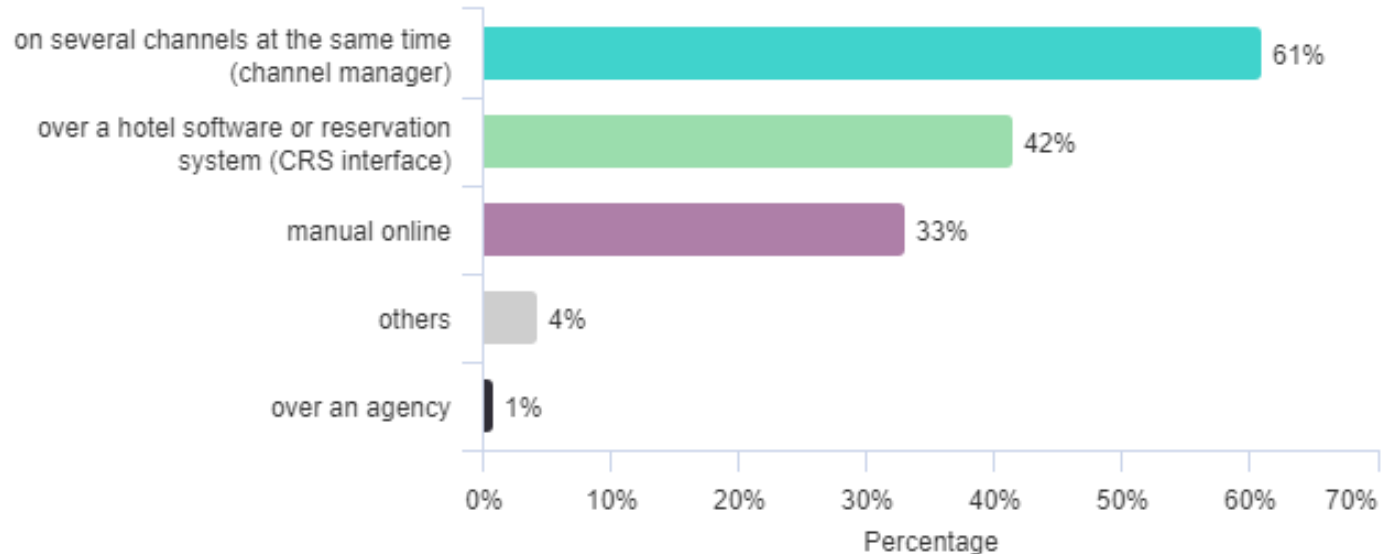
Do you work with a PMS (Property Management System) / Front Office system?

Effective responses: 113　　　*Response rate: 88%*

No (22%)

Yes (78%)
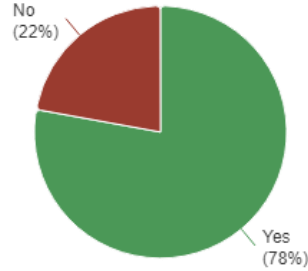
Do you plan to change your PMS within the next 24 months?

Effective responses: 85　　　*Response rate: 66%*

Yes (21%)

No (79%)
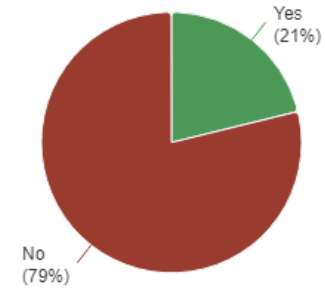
If not, do you plan to acquire a PMS within the next 24 months?

Effective responses: 23　　　*Response rate: 18%*

Yes (4%)

No (96%)
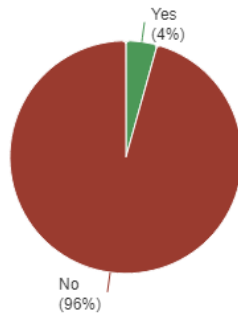
Annex 3: Survey Results for <u>Austria:</u> PMS

Which PMS/Front Office do you currently use?	
	%
Casablanca	17.70%
protel on-premsies (SPE/MPE)	10.10%
Oracle Opera	8.90%
Gastrodat	7.60%
HS/3 Hotelsoftware	7.60%
Oracle fidelio Suite 8	7.60%
EasyBooking	6.30%
Mews	6.30%
Elite	5.10%
protel Cloud	5.10%
Zimmersoftware	3.80%
Aida	2.50%
Hotelmeister	2.50%
Hotline	2.50%
seekda	2.50%
WuBook	2.50%
ibelsa	1.30%
Infor	1.30%
Smoobu	1.30%
StayNTouch	1.30%
WinHotel Solution	1.30%

Synthesis: Revenue Management and Distribution Trends in __Austria__

The Austrian hotel sector shows a **moderate uptake of revenue management (RM) practices**, with 42% of respondents reporting the implementation of a revenue management strategy—slightly below the average of countries like Germany and France, where adoption rates are typically higher. A notable share (53%) still does not apply RM, although 7% plan to implement it in the future. This signals a potential for further diffusion of RM culture, especially in regions where it is not yet standard practice.

Among Austrian hoteliers who do implement RM, the most commonly used **RM tools** include Property Management Systems (PMS, 72%) and Revenue Management Systems (RMS, 62%), aligning with the broader international sample where these tools dominate RM support. However, the use of spreadsheets (30%) remains prevalent, pointing to ongoing reliance on manual, less automated processes in some establishments.

Austrian hotels track a broad set of **performance indicators**, with occupancy rate (81%) and ADR (52%) leading, followed closely by TGOP and RevPAR—demonstrating a good level of KPI literacy. Interestingly, customer-centric KPIs like satisfaction scores (42%) and ALOS (42%) are also prioritized. However, ESG-related KPIs such as energy use and staff retention remain underutilized, a trend consistent with most countries in the survey but more pronounced in Austria.

In terms of **distribution management**, Austria shows a relatively high adoption of channel managers (61%), comparable to more advanced markets. However, 33% of respondents still manage rates manually on online channels, suggesting an operational gap that may hinder real-time rate optimization. PMS usage is strong (78%), with Casablanca and protel being the most common solutions. Yet, PMS replacement intent is low (only 21% plan a change), indicating a certain inertia or satisfaction with existing systems. In sum, Austria's hospitality sector demonstrates a growing but still fragmented approach to RM and distribution, with considerable potential for system optimization and broader strategic adoption.
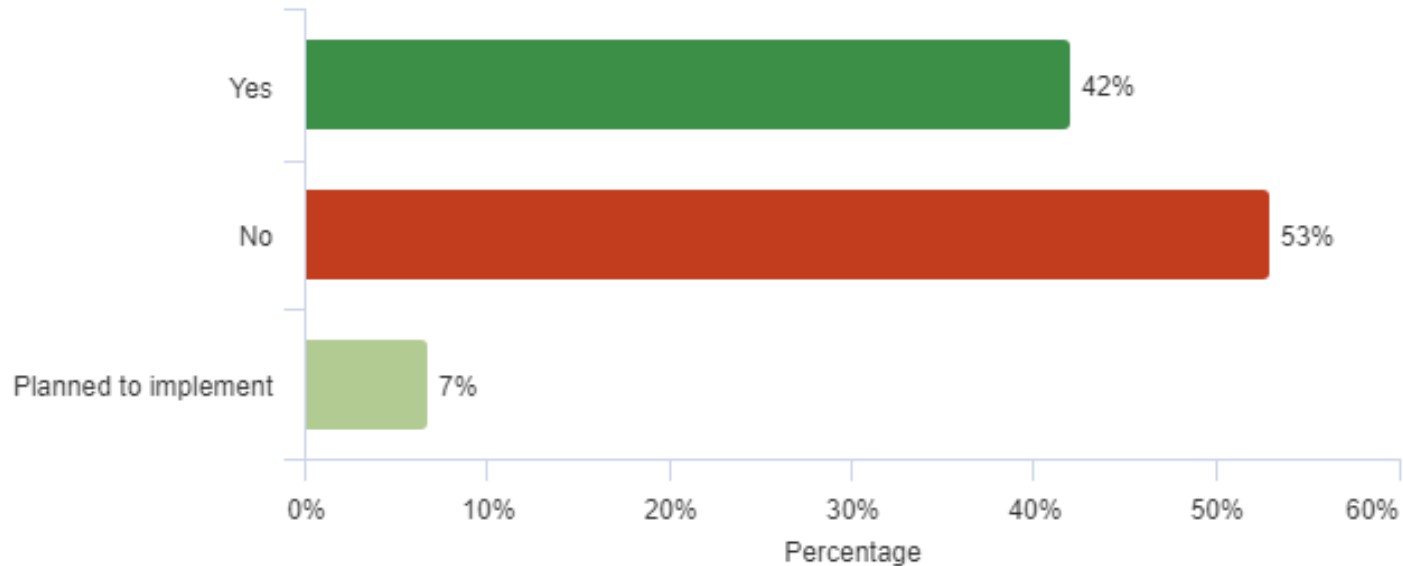
Annex 3: Survey Results for <u>Germany</u>: Revenue Management Strategy

Does your hotel currently implement a revenue management strategy?
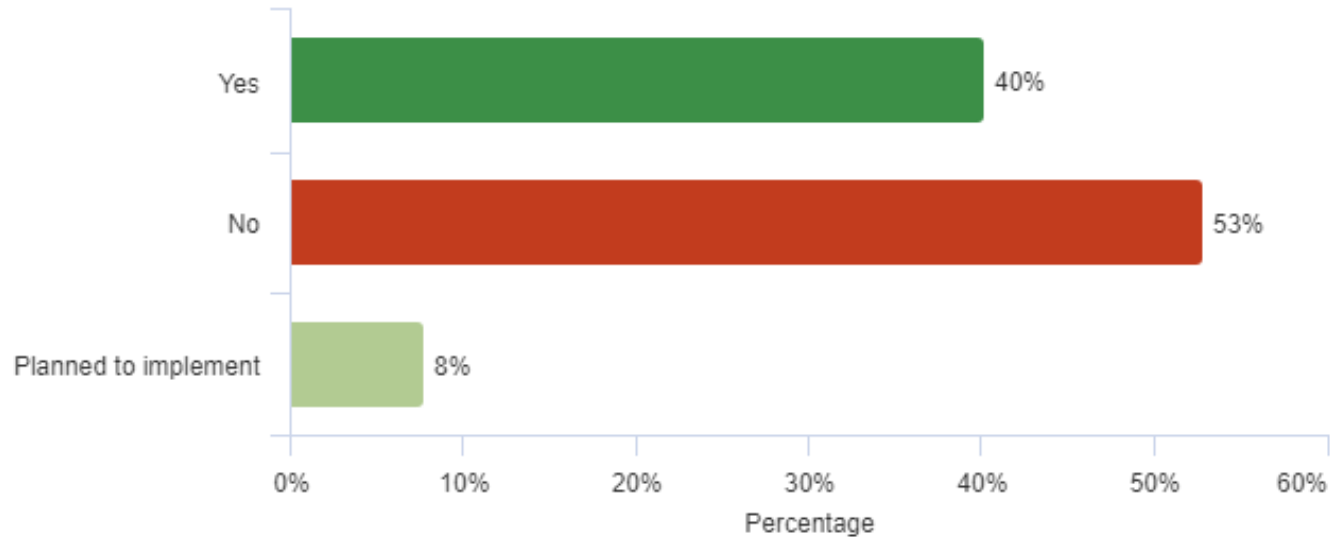
Effective responses: 246

Response rate: 98%

If yes, what tools or systems do you use to support your revenue management decisions? (select all that apply)

Effective responses: 98
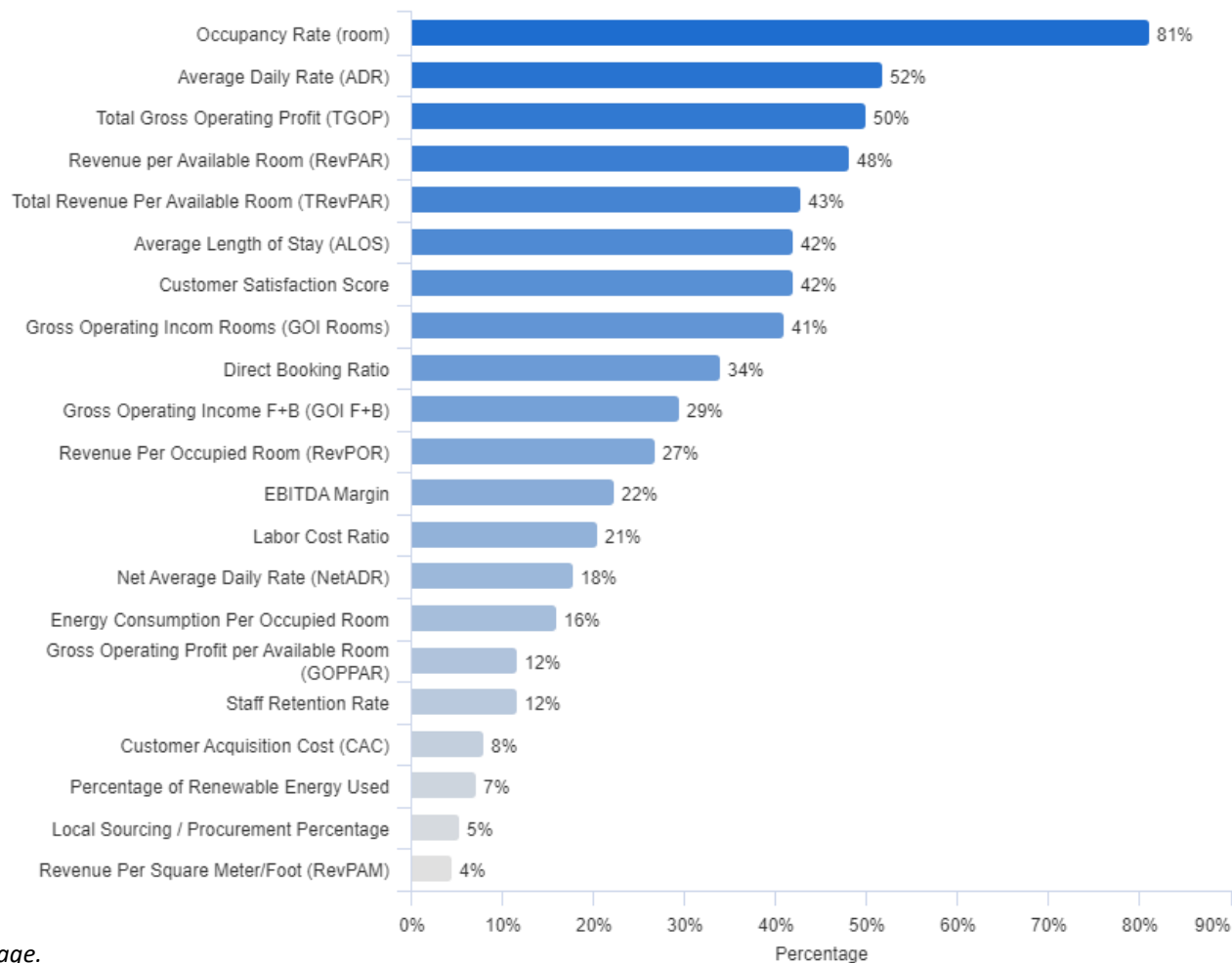
Response rate: 39%

Property Management System (PMS) — 77%
Revenue Management System (RMS) — 55%
Excel/Spreadsheets — 20%
Third-party consultants — 14%
Other — 11%
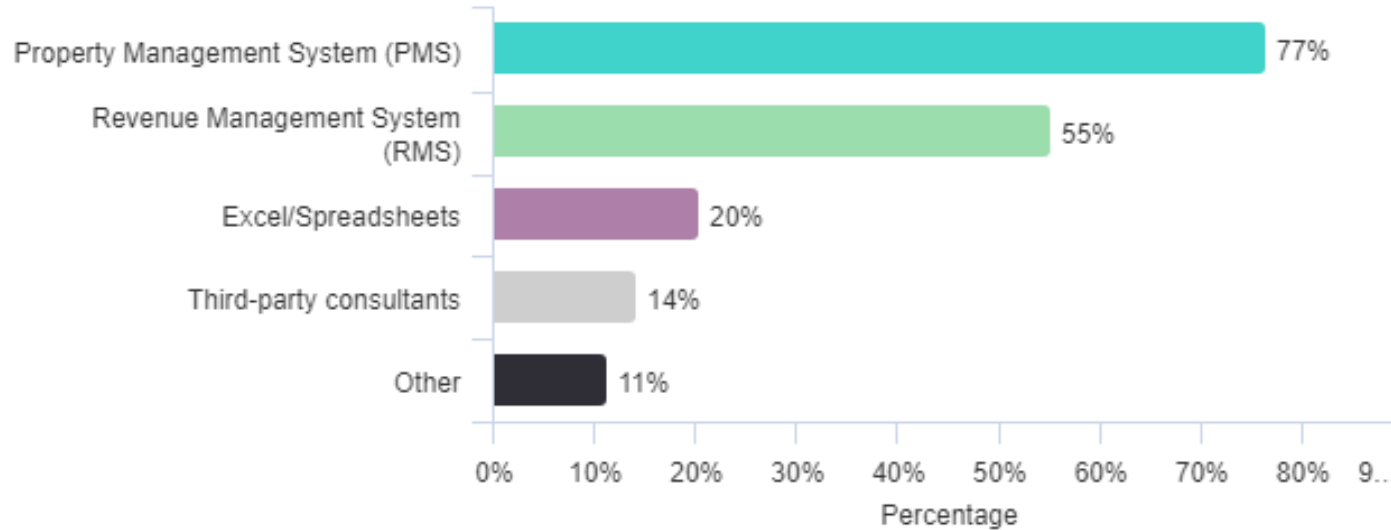
Percentage

Annex 3: Survey Results for <u>Germany:</u> Use of KPIs

Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel's performance? (select all that apply)

KPI	Percentage
Occupancy Rate (room)	77%
Average Daily Rate (ADR)	53%
Revenue per Available Room (RevPAR)	50%
Total Gross Operating Profit (TGOP)	45%
Average Length of Stay (ALOS)	43%
Gross Operating Incom Rooms (GOI Rooms)	39%
Customer Satisfaction Score	37%
Gross Operating Income F+B (GOI F+B)	32%
Direct Booking Ratio	32%
Total Revenue Per Available Room (TRevPAR)	27%
Revenue Per Occupied Room (RevPOR)	24%
Net Average Daily Rate (NetADR)	17%
Energy Consumption Per Occupied Room	16%
EBITDA Margin	14%
Labor Cost Ratio	12%
Gross Operating Profit per Available Room (GOPPAR)	11%
Staff Retention Rate	11%
Customer Acquisition Cost (CAC)	8%
Percentage of Renewable Energy Used	8%
Local Sourcing / Procurement Percentage	5%
Revenue Per Square Meter/Foot (RevPAM)	1%

Percentage

Non-responses are ignored when calculating the percentage.

Annex 3: Survey Results for <u>Germany</u>: Self-Perception of Competitive Position (Revenue and Market Share)

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

Effective responses: 249   *Response rate: 99%*

Response	Percentage
Significantly better	9%
Slightly better	23%
About the same	38%
Slightly worse	12%
Significantly worse	5%
Do not know	13%

Percentage

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

Effective responses: 250   *Response rate: 99%*

Response	Percentage
Much higher profitability	7%
Somewhat higher profitability	21%
Similar profitability	38%
Somewhat lower profitability	13%
Much lower profitability	4%
Do not know	18%

Percentage

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

Effective responses: 248   *Response rate: 98%*

Response	Percentage
Leading in market share	8%
Slightly above average	27%
On par with competitors	41%
Slightly below average	10%
Losing market share significantly	2%
Do not know	12%

Percentage
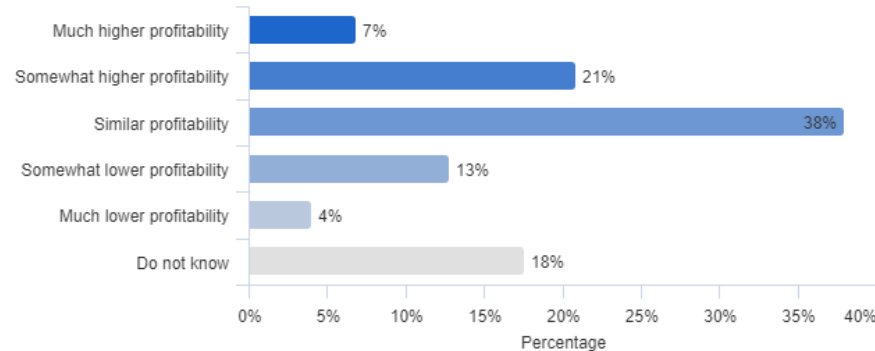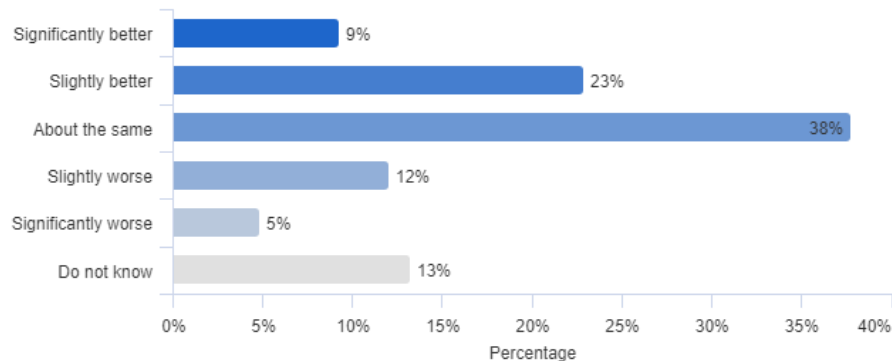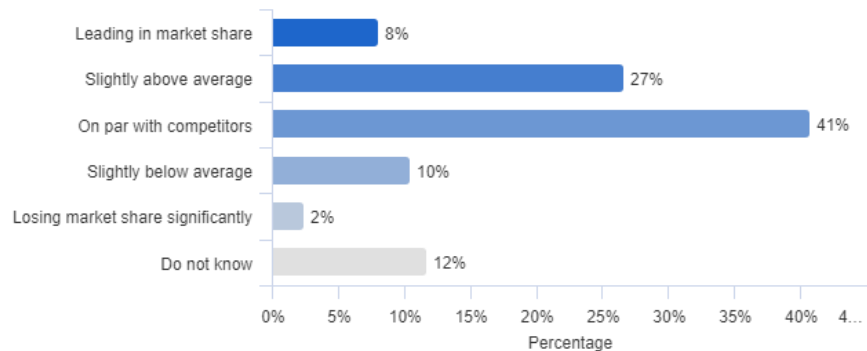
Annex 3: Survey Results for <u>Germany</u>: Decision-Making Orientation and Analytical Thinking in Hotel Management

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

I consider multiple options before making a decision: 1% | 3% | 6% | 6% | 19% | 33% | 31%

I consider all the available facts and information when attributing causes to behavior: 1% | 2% | 9% | 13% | 26% | 31% | 17%

I often look at a situation from different viewpoints: 1% | 3% | 6% | 11% | 21% | 32% | 26%

Legend: Strongly Disagree=1 | 2 | 3 | 4 | 5 | 6 | Strongly agree=7
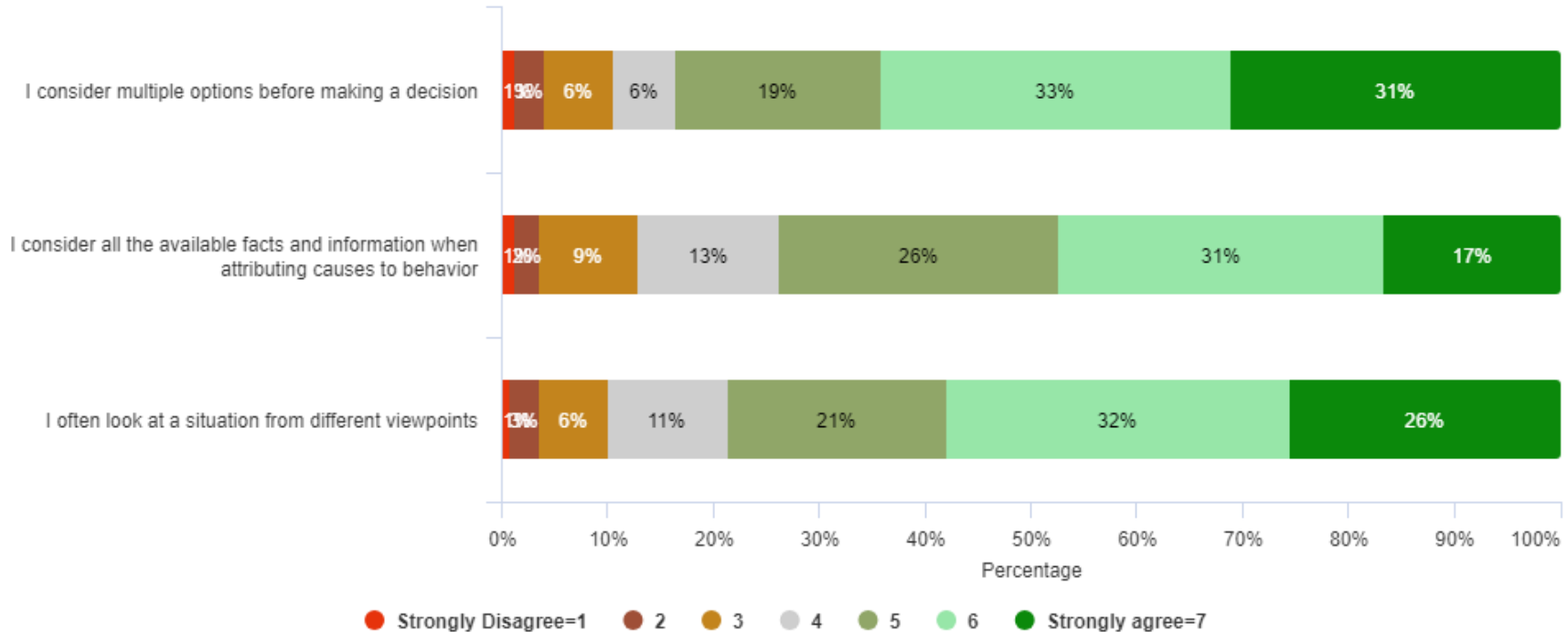
Annex 3: Survey Results for <u>Germany</u>: Technological Practices for Rate and Availability Management on Online Channels

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

Effective responses: 246

Response rate: 98%

Channel	Percentage
on several channels at the same time (channel manager)	64%
over a hotel software or reservation system (CRS interface)	44%
manual online	27%
others	2%
over an agency	2%

Percentage
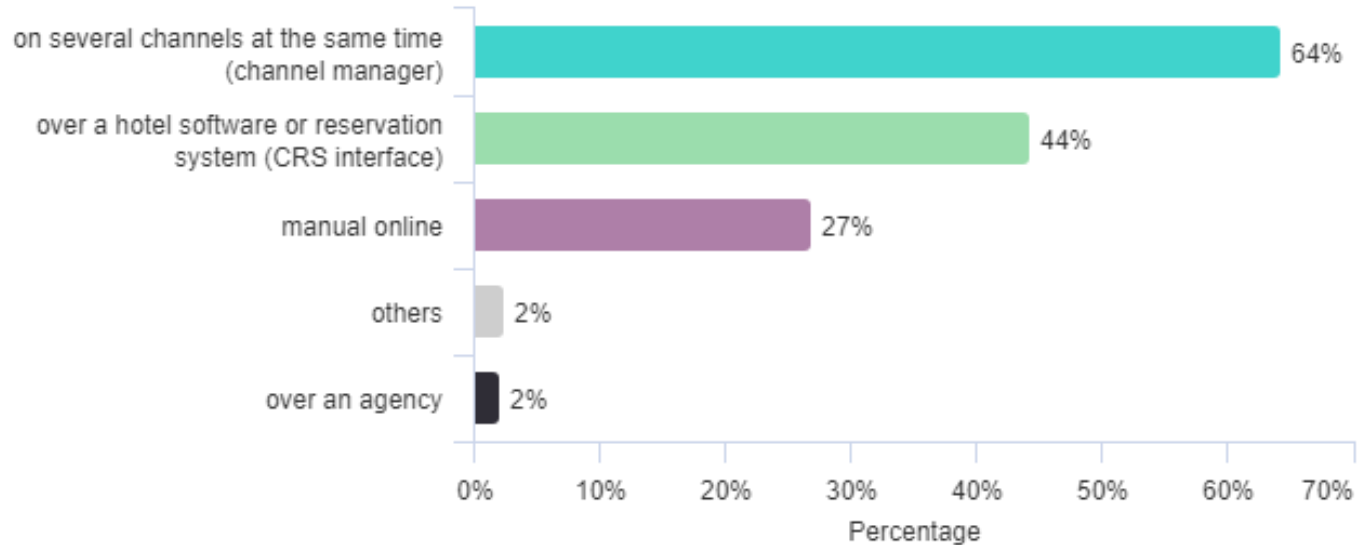
Annex 3: Survey Results for <u>Germany</u>: PMS

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

Effective responses: 240   *Response rate: 95%*

No (21%)
Yes (79%)
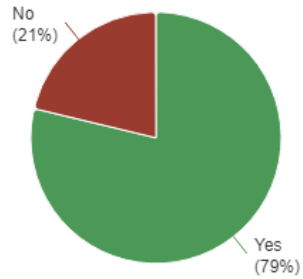
Do you plan to change your PMS within the next 24 months?

Effective responses: 180   *Response rate: 71%*
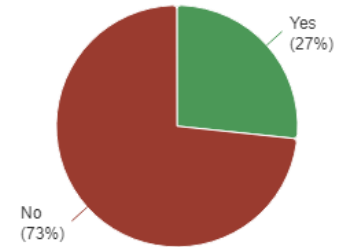
Yes (27%)
No (73%)

If not, do you plan to acquire a PMS within the next 24 months?

Effective responses: 50   *Response rate: 20%*

Yes (16%)
No (84%)
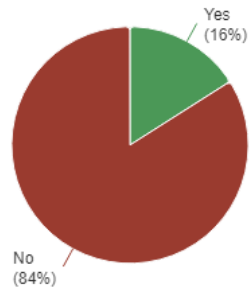
Annex 3: Survey Results for <u>Germany</u>: PMS

Which PMS/Front Office do you currently use?	%		%
HS/3 Hotelsoftware	13.90%	Felix	1.20%
protel on-premsies (SPE/MPE)	13.90%	Hope	1.20%
Hotline	9.60%	Infor	1.20%
ibelsa	7.80%	Lean Hotel System	1.20%
Oracle Opera	7.80%	WinHotel Solution	1.20%
Guestline	5.40%	Aida	0.60%
Oracle fidelio Suite 8	5.40%	Casablanca	0.60%
3RPMS Hotelsoftware	4.80%	Cloudbeds	0.60%
protel Cloud	4.80%	EMMA	0.60%
Mews	3.60%	HoRes	0.60%
Sihot	2.40%	Igumbi	0.60%
VelHotel / Velox Pension	2.40%	Little Hotelier	0.60%
ASA	1.80%	Resavio	0.60%
beds24	1.80%	RoomRaccoon	0.60%
Citadel	1.80%	SAP Business One 4 Hotels	0.60%
Amadeus Property PM PRO	1.20%	Smoobu	0.60%
Apaleo	1.20%		

Synthesis: Revenue Management and Distribution Trends in **Germany:**

The adoption of **revenue management strategies among German hotels remains moderate**, with 40% of surveyed establishments actively implementing such strategies and 8% planning to adopt them. This is in line with Austria and slightly below the average across the six-country sample. More than half of German respondents (53%) still operate without any formal revenue management approach, highlighting potential for further professionalization in pricing strategies.

In terms of **supporting tools**, the German market shows a solid adoption of digital infrastructure. 77% of hotels using revenue management strategies rely on a Property Management System (PMS), and 55% use a dedicated Revenue Management System (RMS). Compared to Austria (72% PMS, 62% RMS), German hotels are more reliant on PMS but slightly less on RMS. Third-party consultants are used by 14%, indicating moderate external expertise reliance.

Key Performance Indicators (KPIs) most widely tracked in Germany mirror those in other countries. Occupancy rate (77%), ADR (53%), and RevPAR (50%) are the top metrics, similar to broader European trends. However, Germany shows slightly higher attention to customer satisfaction scores (37%) and operational KPIs like GOI (39%) and ALOS (43%), suggesting a well-rounded performance monitoring culture. Nevertheless, sustainability-oriented indicators like percentage of renewable energy used (8%) or staff retention rate (11%) remain marginal.

Distribution practices show high technological maturity. A majority (64%) of German hotels use a channel manager to maintain rates and availability across booking channels, with CRS interfaces (44%) and manual updates (27%) still playing a role. PMS adoption is high at 79%, and most users express no short-term intention to change systems. The diversity of PMS vendors (with HS/3 and protel leading) reflects a fragmented but developed market.

In summary, Germany's hotel sector demonstrates solid digital foundations and analytical practices in revenue management, comparable to its neighbors. However, the relatively low formal adoption of revenue management strategies and limited use of sustainability KPIs highlight key areas for strategic development.

Annex 3: Survey Results for <u>France</u> : Revenue Management Strategy

Does your hotel currently implement a revenue management strategy?

Effective responses: 305
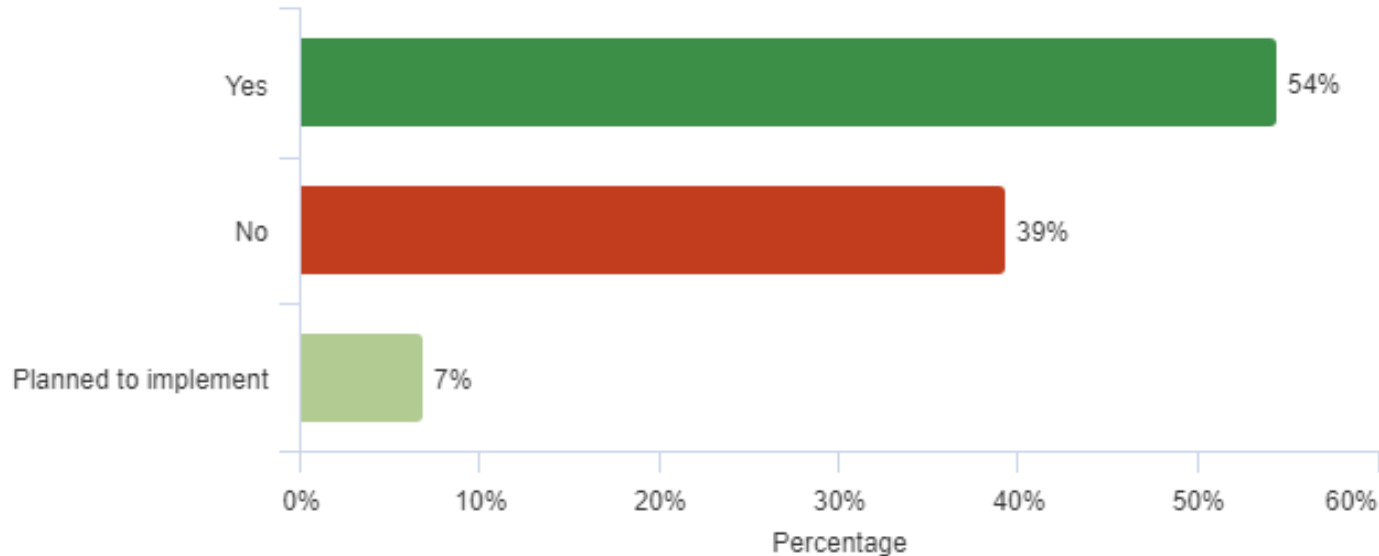
Response rate: 98%

Annex 3: Survey Results for <u>France</u> : Tools for Revenue Management Strategy Support

If yes, what tools or systems do you use to support your revenue management decisions? (select all that apply)

Effective responses: 164

Response rate: 53%
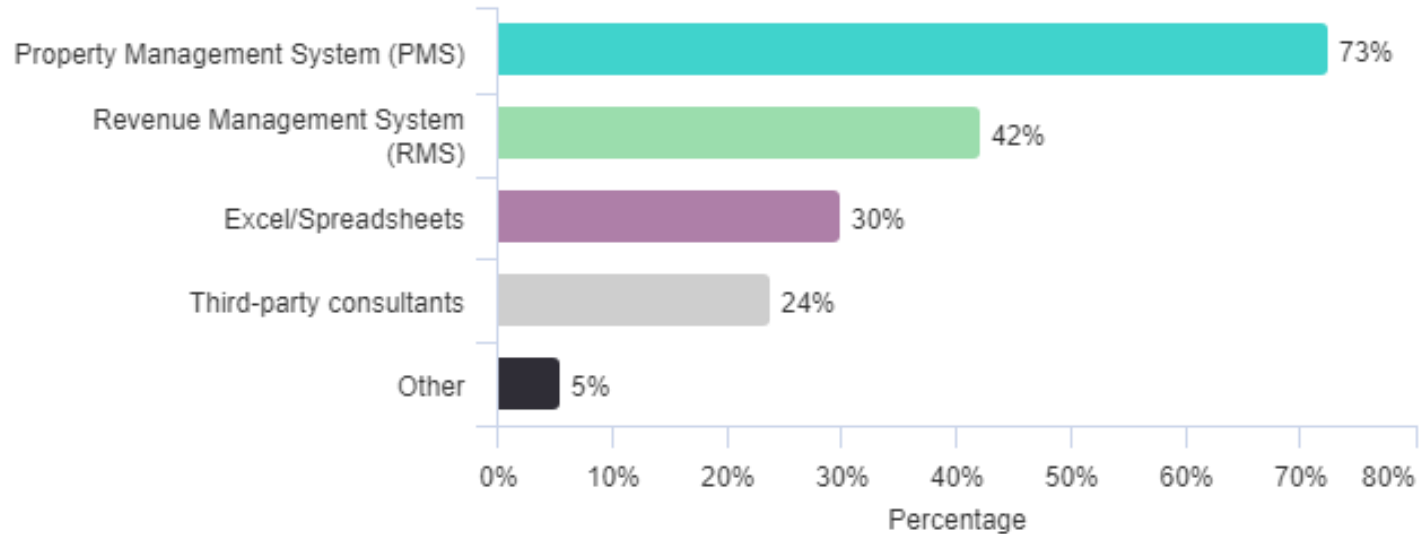
Annex 3: Survey Results for <u>France</u> : Use of KPIs

Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel's performance? (select all that apply)

KPI	Percentage
Occupancy Rate (room)	91%
Customer Satisfaction Score	63%
Revenue per Available Room (RevPAR)	60%
Average Daily Rate (ADR)	59%
Gross Operating Incom Rooms (GOI Rooms)	53%
Average Length of Stay (ALOS)	42%
Gross Operating Income F+B (GOI F+B)	37%
Direct Booking Ratio	36%
Labor Cost Ratio	31%
Energy Consumption Per Occupied Room	25%
EBITDA Margin	21%
Net Average Daily Rate (NetADR)	19%
Revenue Per Occupied Room (RevPOR)	16%
Total Gross Operating Profit (TGOP)	13%
Total Revenue Per Available Room (TRevPAR)	11%
Gross Operating Profit per Available Room (GOPPAR)	7%
Customer Acquisition Cost (CAC)	7%
Local Sourcing / Procurement Percentage	6%
Percentage of Renewable Energy Used	6%
Staff Retention Rate	5%
Revenue Per Square Meter/Foot (RevPAM)	1%

Non-responses are ignored when calculating the percentage.

Annex 3: Survey Results for <u>France</u> : Self-Perception of Competitive Position (Revenue and Market Share)

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

I consider multiple options before making a decision: 0%, 3%, 8%, 18%, 26%, 45%

I consider all the available facts and information when attributing causes to behavior: 0%, 2%, 2%, 10%, 24%, 29%, 33%

I often look at a situation from different viewpoints: 0%, 3%, 8%, 22%, 30%, 36%

Percentage

● Strongly Disagree=1 ● 2 ● 3 ● 4 ● 5 ● 6 ● Strongly agree=7

Annex 3: Survey Results for <u>France</u> : Technological Practices for Rate and Availability Management on Online Channels

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

Effective responses: 305

Response rate: 98%

Category	Percentage
on several channels at the same time (channel manager)	69%
over a hotel software or reservation system (CRS interface)	65%
manual online	12%
over an agency	4%
others	3%

Percentage
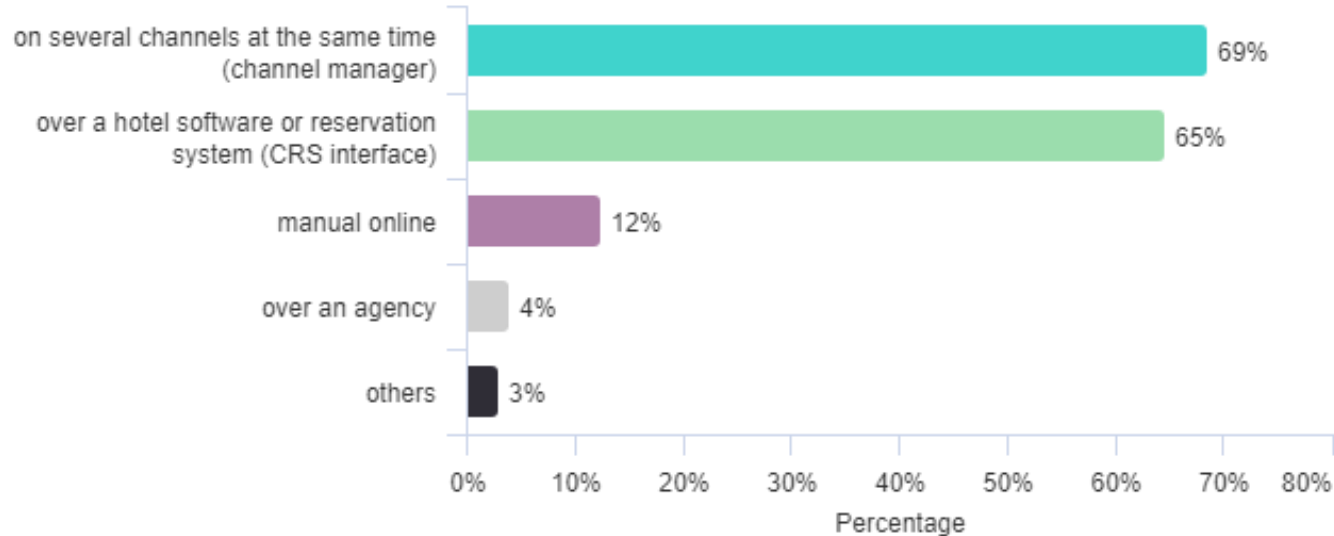
Annex 3: Survey Results for <u>France</u> : PMS

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

Effective responses: 301   *Response rate: 97%*

No
(15%)

Yes
(85%)
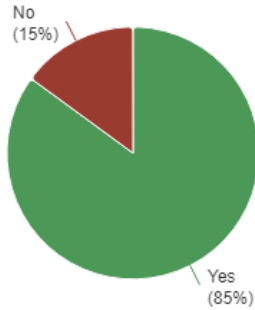
Do you plan to change your PMS within the next 24 months?

Effective responses: 251   *Response rate: 81%*

Yes
(20%)

No
(80%)
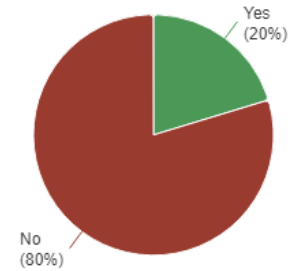
If not, do you plan to acquire a PMS within the next 24 months?

Effective responses: 44   *Response rate: 14%*

Yes
(9%)

No
(91%)
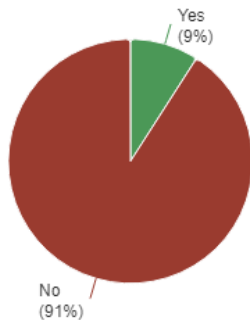
Annex 3: Survey Results for <u>France</u> : PMS

Which PMS/Front Office do you currently use?			
	%		**%**
FOLS	19.30%	GHM	1.30%
Infhotik	9.30%	Hope	1.30%
Oracle Opera	9.30%	HS/3 Hotelsoftware	1.30%
Misterbooking	7.30%	Lean Hotel System	1.30%
Mews	6.00%	Octorate	1.30%
WinHotel Solution	5.30%	protel Cloud	1.30%
Amenitiz	4.00%	Reservit	1.30%
HOTSOFT	4.00%	5stelle*	0.70%
Apaleo	3.30%	Amadeus Property PM PRO	0.70%
Thais	3.30%	Bookingplanner by Stardekk	0.70%
protel on-premsies (SPE/MPE)	2.70%	Cloudbeds	0.70%
Vega zucchetti	2.70%	Felix	0.70%
Fiducial	2.00%	Guestline	0.70%
WuBook	2.00%	Pas-H	0.70%
Astério	1.30%	RMS cloud	0.70%
Clock	1.30%	Shiji Enterprise Platform	0.70%
Geho	1.30%	VelHotel / Velox Pension	0.70%

Synthesis: Revenue Management and Distribution Trends in **<u>France</u>** :

Hotels in the sample from France stand out as an **advanced market in terms of revenue management** (RM) adoption among the six countries surveyed. With 54% of responding hotels declaring an active RM strategy, France exceeds the sample average. French hotels also show strong adoption of technological tools: 73% of those implementing RM use a PMS, and 42% use a Revenue Management System (RMS).

Distribution practices in France also reflect **high digital maturity**. A substantial 69% of respondents manage their rates and availability via a channel manager, and 65% use hotel software or CRS interfaces. Manual updates are rare (12%), a clear divergence from some countries in the sample where this figure remains above 25%. This indicates that French hotels in the sample are leveraging automation and centralized systems to maintain rate parity and streamline operations.

French hoteliers also demonstrate a **nuanced use of performance metrics**. Notably, they lead in tracking KPIs like Customer Satisfaction (63%) and RevPAR (60%), along with occupancy (91%) and ADR (59%). Environmental and cost-related indicators (e.g., energy use, labor costs) are also more frequently tracked than in most other countries—signaling increasing attention to operational sustainability and profitability beyond traditional financial benchmarks.

Despite this strong operational foundation, French hoteliers **display more modest perceptions of competitive advantage**. Only 24% believe they outperform peers in revenue, and just 18% in profitability, with a large proportion unsure. This gap between advanced practices and limited perceived advantage may reflect either intense market competition or limited strategic confidence. It suggests that while tools and practices are in place, the next frontier lies in improving strategic differentiation and internal benchmarking.

Annex 3: Survey Results for <u>Greece</u> : Revenue Management Strategy

Does your hotel currently implement a revenue management strategy?
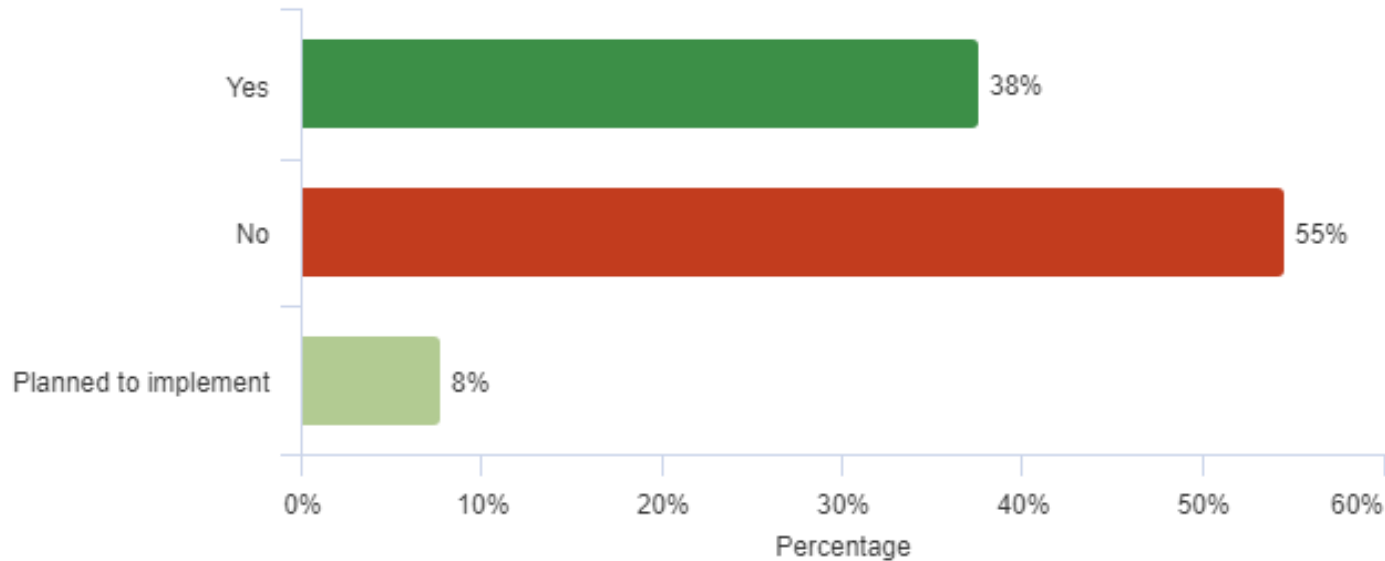
Effective responses: 454   Response rate: 100%

If yes, what tools or systems do you use to support your revenue management decisions? (select all that apply)

Effective responses: 171   Response rate: 38%
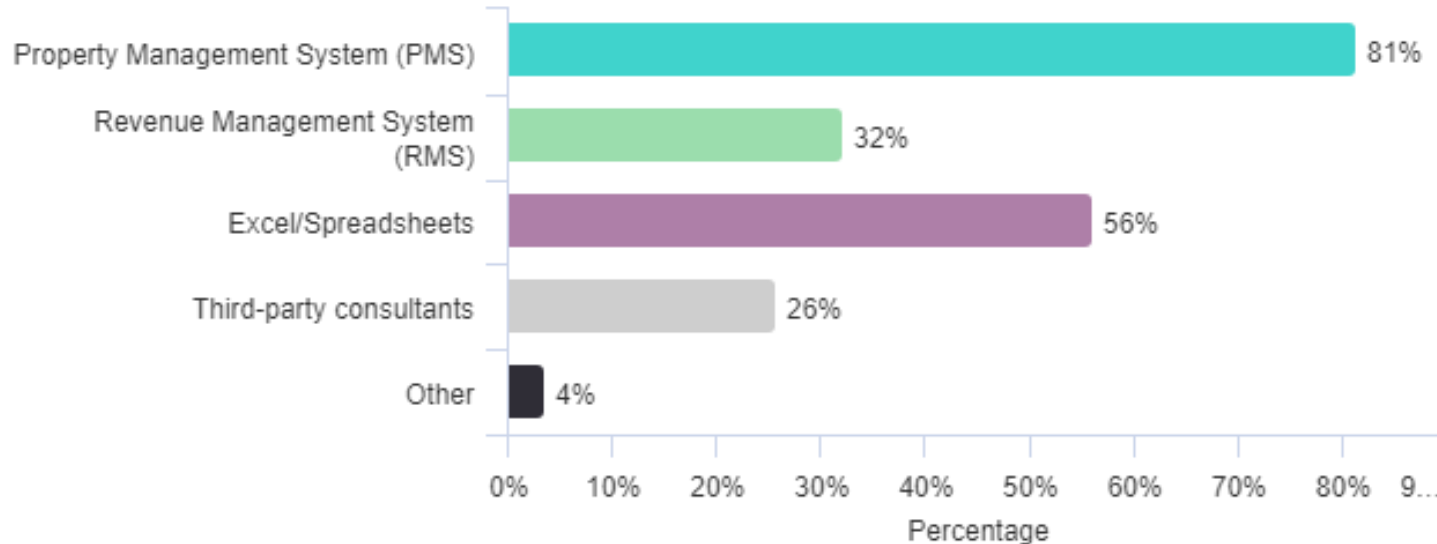
Annex 3: Survey Results for <u>Greece</u> : Use of KPIs

Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel's performance? (select all that apply)

KPI	Percentage
Occupancy Rate (room)	81%
Average Daily Rate (ADR)	68%
Average Length of Stay (ALOS)	49%
Direct Booking Ratio	45%
Revenue per Available Room (RevPAR)	44%
Customer Satisfaction Score	39%
Total Gross Operating Profit (TGOP)	38%
Labor Cost Ratio	37%
Gross Operating Incom Rooms (GOI Rooms)	34%
Revenue Per Occupied Room (RevPOR)	34%
Net Average Daily Rate (NetADR)	33%
Total Revenue Per Available Room (TRevPAR)	32%
Energy Consumption Per Occupied Room	27%
Gross Operating Income F+B (GOI F+B)	24%
EBITDA Margin	23%
Staff Retention Rate	16%
Gross Operating Profit per Available Room (GOPPAR)	15%
Local Sourcing / Procurement Percentage	14%
Percentage of Renewable Energy Used	12%
Customer Acquisition Cost (CAC)	8%
Revenue Per Square Meter/Foot (RevPAM)	2%

Percentage

Non-responses are ignored when calculating the percentage.

Annex 3: Survey Results for <u>Greece</u> : Self-Perception of Competitive Position (Revenue and Market Share)

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

Effective responses: 454   Response rate: 100%

- Significantly better: 7%
- Slightly better: 8%
- About the same: 43%
- Slightly worse: 20%
- Significantly worse: 2%
- Do not know: 21%

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

Effective responses: 454   Response rate: 100%

- Much higher profitability: 4%
- Somewhat higher profitability: 13%
- Similar profitability: 43%
- Somewhat lower profitability: 13%
- Much lower profitability: 3%
- Do not know: 23%

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

Effective responses: 454   Response rate: 100%

- Leading in market share: 6%
- Slightly above average: 27%
- On par with competitors: 34%
- Slightly below average: 10%
- Losing market share significantly: 3%
- Do not know: 20%
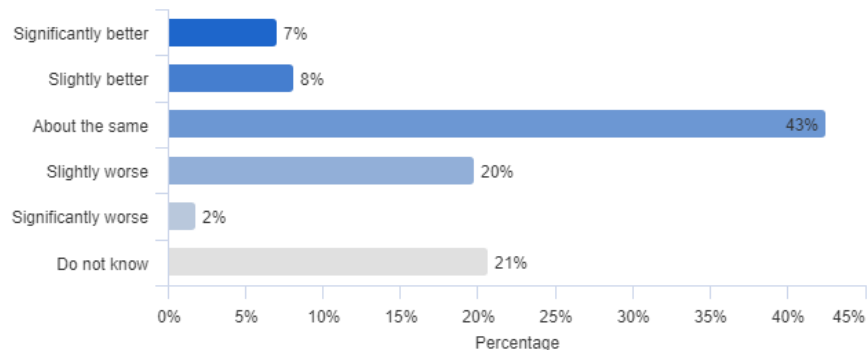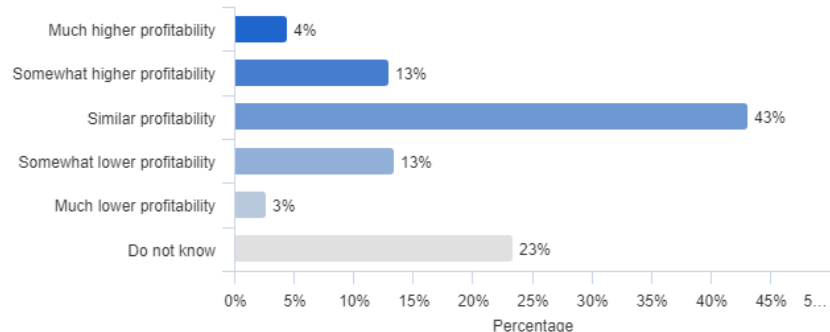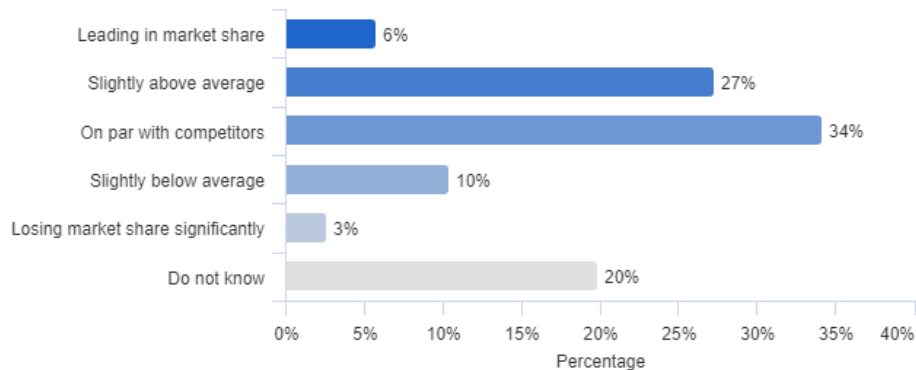
Annex 3: Survey Results for <u>Greece</u> : Decision-Making Orientation and Analytical Thinking in Hotel Management

Hes·so// VALAIS WALLIS

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

Statement	1	2	3	4	5	6	7
I consider multiple options before making a decision	0%		5%	11%	23%	22%	38%
I consider all the available facts and information when attributing causes to behavior	0%		4%	11%	21%	25%	36%
I often look at a situation from different viewpoints	0%		4%	12%	21%	25%	36%

Percentage

● Strongly Disagree=1 ● 2 ● 3 ● 4 ● 5 ● 6 ● Strongly agree=7
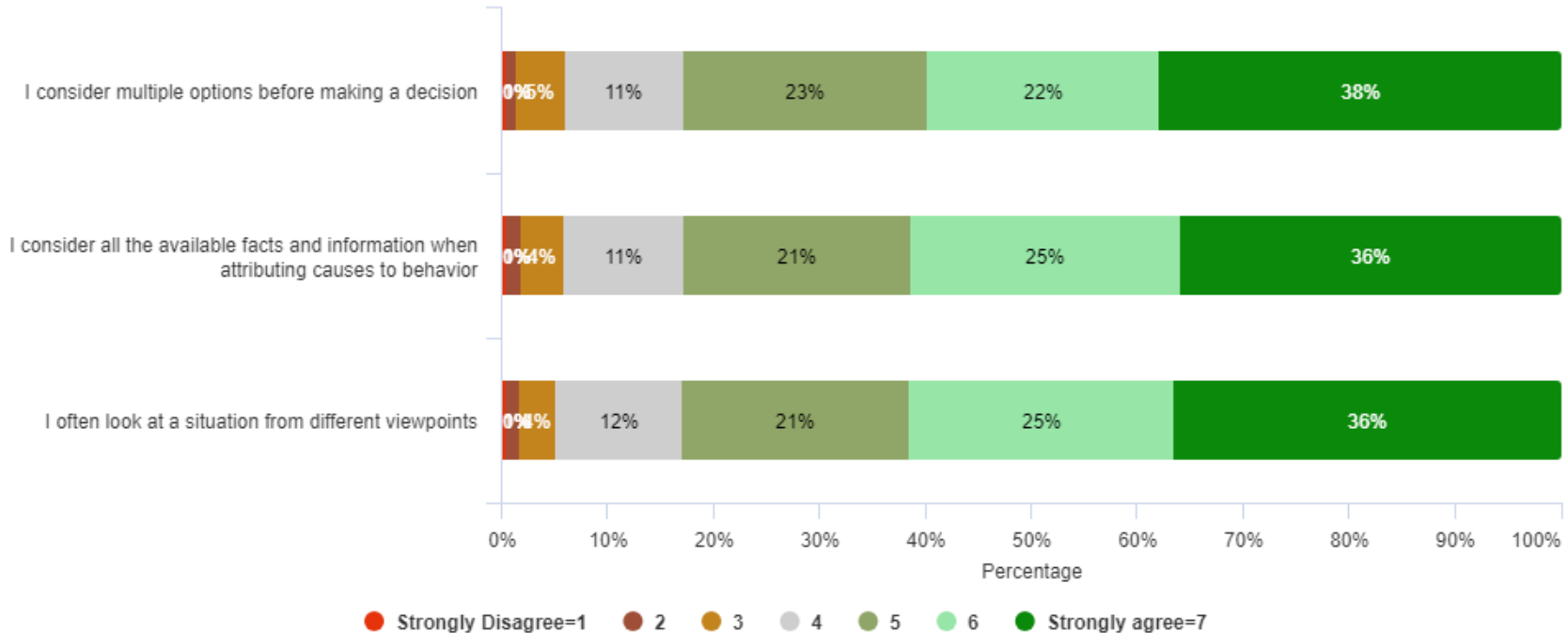
Annex 3: Survey Results for <u>Greece</u> : Technological Practices for Rate and Availability Management on Online Channels

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

Effective responses: 436   *Response rate: 96%*
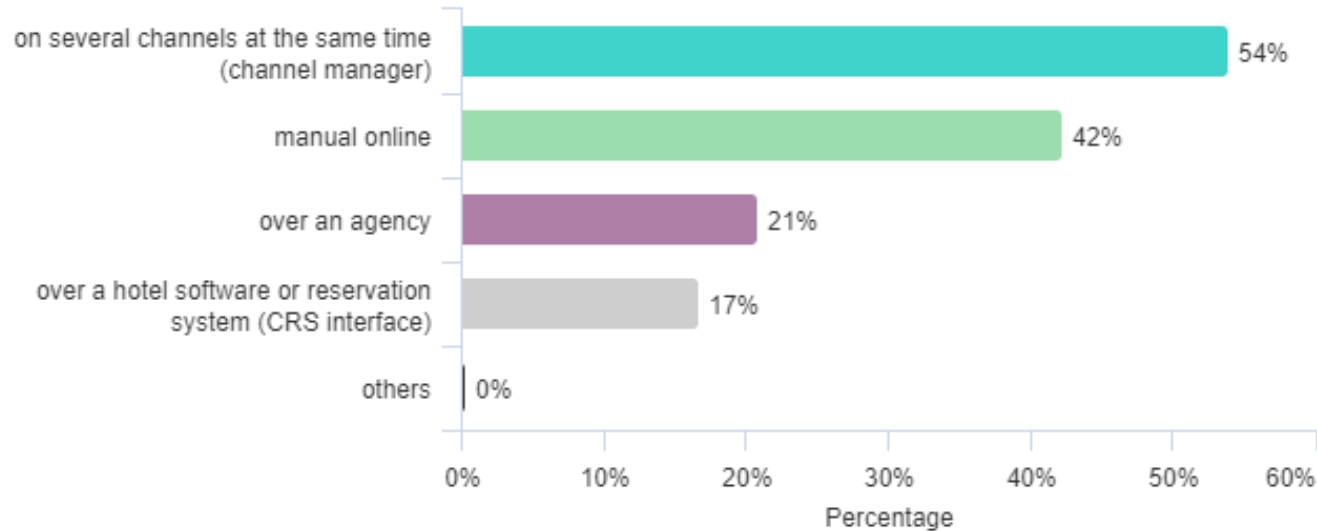
Category	Percentage
on several channels at the same time (channel manager)	54%
manual online	42%
over an agency	21%
over a hotel software or reservation system (CRS interface)	17%
others	0%

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

Effective responses: 441   *Response rate: 97%*

No (40%)
Yes (60%)
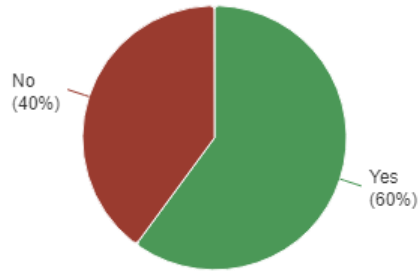
Do you plan to change your PMS within the next 24 months?

Effective responses: 261   *Response rate: 57%*

Yes (11%)
No (89%)
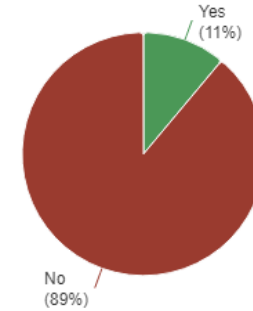
If not, do you plan to acquire a PMS within the next 24 months?

Effective responses: 157   *Response rate: 35%*

Yes (29%)
No (71%)
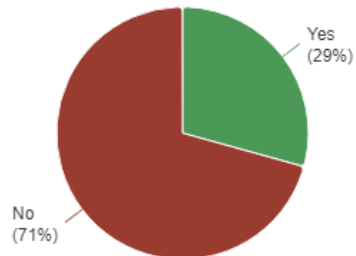
Annex 3: Survey Results for <u>Greece</u> : PMS

Which PMS/Front Office do you currently use?			
	%		**%**
protel on-premsies (SPE/MPE)	18.80%	Amadeus Property PM PRO	1.60%
protel Cloud	14.80%	Hotelmeister	1.60%
Oracle Opera	13.30%	Hotelworks	1.60%
Hotelizer	10.20%	Netera	1.60%
Pylon	9.40%	RoomRack	1.60%
WELCOME NETERA	4.70%	Hogatex	0.80%
Oracle fidelio Suite 8	3.90%	Hotline	0.80%
3RPMS Hotelsoftware	2.30%	Little Hotelier	0.80%
Alexandros	2.30%	Mews	0.80%
EasyBooking	2.30%	Reconline PMS	0.80%
RMS cloud	2.30%	RoomRaccoon	0.80%
Unidata	2.30%	SAP Business One 4 Hotels	0.80%

Synthesis: Revenue Management and Distribution Trends in <u>Greece</u> :

Hotels in the sample from Greece show **a developing landscape in terms of revenue management (RM)**. Only 38% of surveyed hotels report having implemented a revenue management strategy—well below the six-country average. This points to a market where RM practices are still emerging, though some hotels show intent to catch up (8% plan to implement RM in the future).

Despite limited RM adoption, Greek hotels reveal **strong reliance on basic technological tools**. Among hotels using RM, 81% rely on a PMS and 56% on Excel spreadsheets—significantly more than in most countries. Only 32% use a Revenue Management System (RMS), indicating a lower penetration of advanced RM tools. This suggests a hybrid model that mixes manual oversight with partial digital support, possibly reflecting budget constraints or local market dynamics.

Channel management practices are mixed. While 54% of hotels use a channel manager to synchronize rates and availability, manual online updates remain common (42%), and only 17% use a CRS or hotel software interface. This highlights a slower adoption of full integration for online distribution compared to countries like France or Austria.

In terms of performance monitoring, **Greek hoteliers focus strongly on traditional KPIs** such as occupancy rate (81%) and ADR (68%). Financial indicators like RevPAR (44%) and GOP (38%) are also commonly tracked. However, non-financial and sustainability metrics such as energy use, local sourcing, or CAC remain marginal. This indicates a still-limited integration of holistic performance evaluation, with a strong emphasis on volume and price indicators.

When it comes to **competitive perception**, Greek hoteliers are cautious. Only 15% think they perform better in terms of revenue, and just 17% believe they are more profitable than competitors. Around 43% consider themselves on par. This relatively conservative outlook may reflect the high competitiveness of the Greek hospitality market and fragmented industry structure.

Overall, the Greek hotel sector is at a **transitional stage**. While many properties have adopted basic digital tools (notably PMS), the full strategic integration of RM and automation is still limited. The next steps for Greek hotels could include the broader adoption of RMS, diversification of KPIs to include sustainability and customer acquisition costs, and investment in rate integration technologies to reduce manual handling and increase profitability.

Annex 3: Survey Results for <u>Italy</u> : Revenue Management Strategy

Does your hotel currently implement a revenue management strategy?
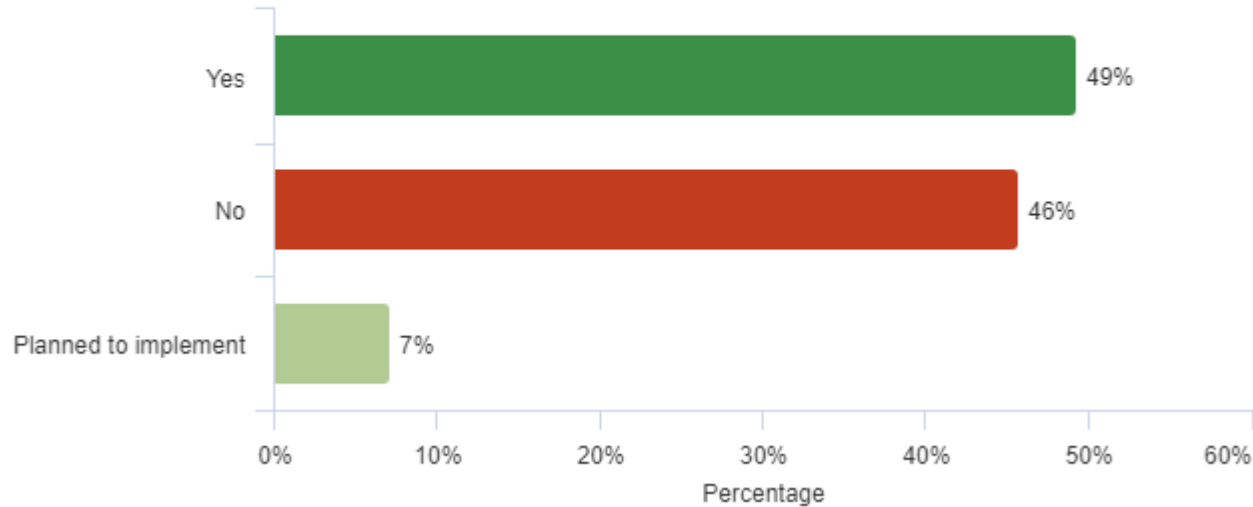
Effective responses: 140   Response rate: 99%

If yes, what tools or systems do you use to support your revenue management decisions? (select all that apply)

Effective responses: 69

Response rate: 49%
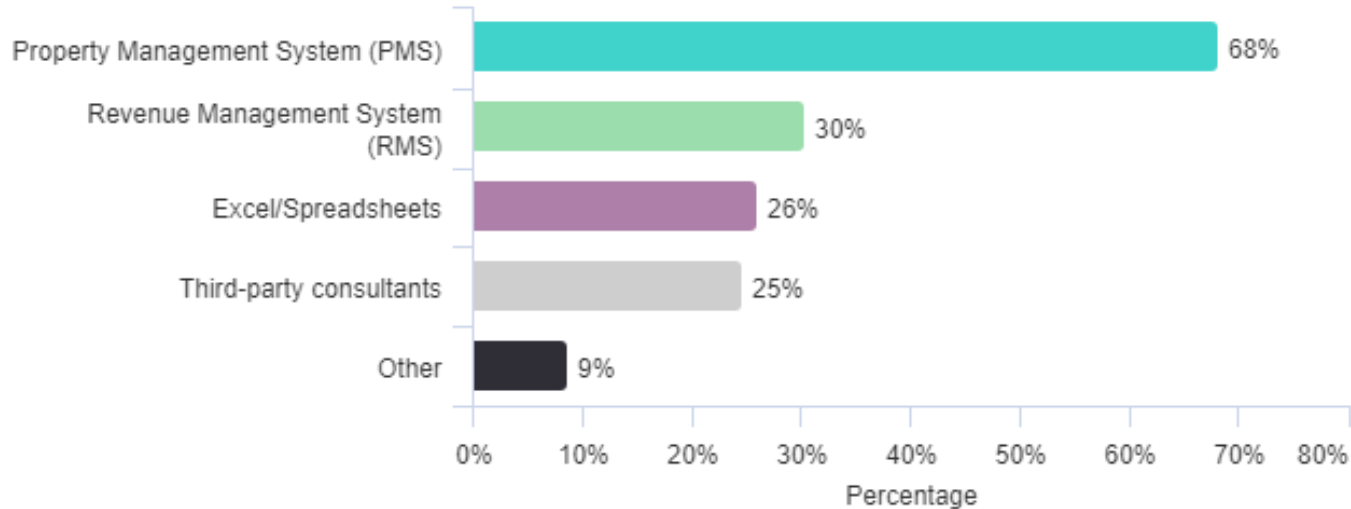
Annex 3: Survey Results for <u>Italy</u> : Use of KPIs

Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel's performance? (select all that apply)

KPI	Percentage
Occupancy Rate (room)	84%
Average Daily Rate (ADR)	67%
Average Length of Stay (ALOS)	63%
Direct Booking Ratio	52%
Customer Satisfaction Score	51%
Revenue per Available Room (RevPAR)	42%
Labor Cost Ratio	32%
Revenue Per Occupied Room (RevPOR)	26%
Net Average Daily Rate (NetADR)	25%
Total Gross Operating Profit (TGOP)	24%
EBITDA Margin	24%
Total Revenue Per Available Room (TRevPAR)	23%
Gross Operating Incom Rooms (GOI Rooms)	20%
Staff Retention Rate	16%
Customer Acquisition Cost (CAC)	15%
Gross Operating Income F+B (GOI F+B)	14%
Percentage of Renewable Energy Used	14%
Energy Consumption Per Occupied Room	13%
Gross Operating Profit per Available Room (GOPPAR)	7%
Revenue Per Square Meter/Foot (RevPAM)	6%
Local Sourcing / Procurement Percentage	6%

Percentage

Non-responses are ignored when calculating the percer

Annex 3: Survey Results for <u>Italy</u> : Self-Perception of Competitive Position (Revenue and Market Share)

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

Effective responses: 141   *Response rate: 100%*

Significantly better	3%
Slightly better	28%
About the same	46%
Slightly worse	6%
Significantly worse	1%
Do not know	16%

Percentage (0% – 50%)

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

Effective responses: 141   *Response rate: 100%*

Much higher profitability	1%
Somewhat higher profitability	24%
Similar profitability	48%
Somewhat lower profitability	10%
Much lower profitability	1%
Do not know	16%

Percentage (0% – 60%)

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

Effective responses: 141   *Response rate: 100%*

Leading in market share	5%
Slightly above average	25%
On par with competitors	50%
Slightly below average	9%
Losing market share significantly	0%
Do not know	11%

Percentage (0% – 60%)
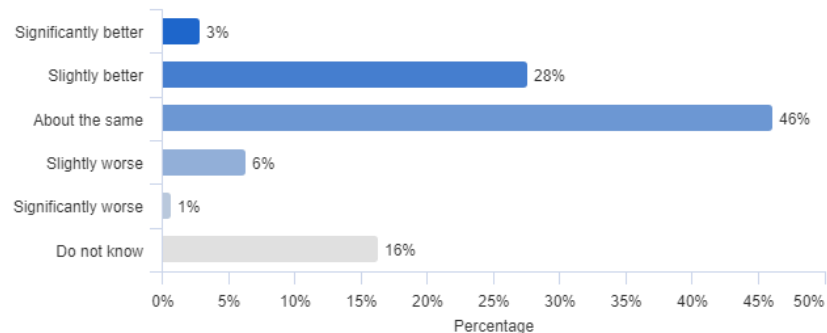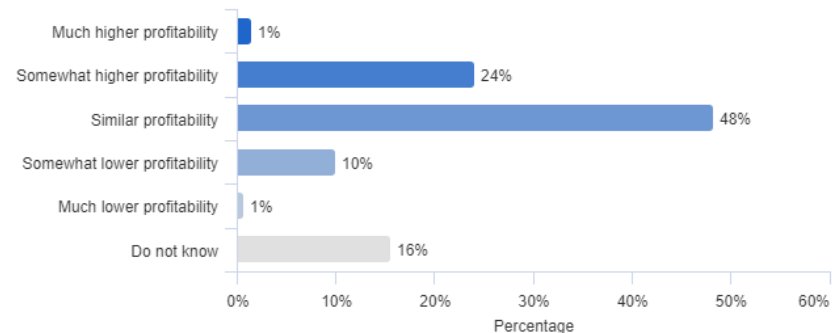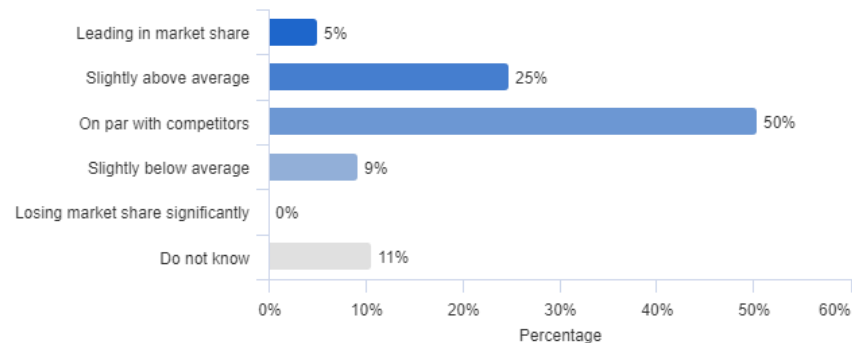
Annex 3: Survey Results for <u>Italy</u> : Decision-Making Orientation and Analytical Thinking in Hotel Management

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

I consider multiple options before making a decision
1% 3% 10% 20% 30% 35%

I consider all the available facts and information when attributing causes to behavior
3% 16% 31% 29% 20%

I often look at a situation from different viewpoints
1% 4% 15% 24% 31% 24%

Percentage

Legend:
● Strongly Disagree=1 ● 2 ● 3 ● 4 ● 5 ● 6 ● Strongly agree=7
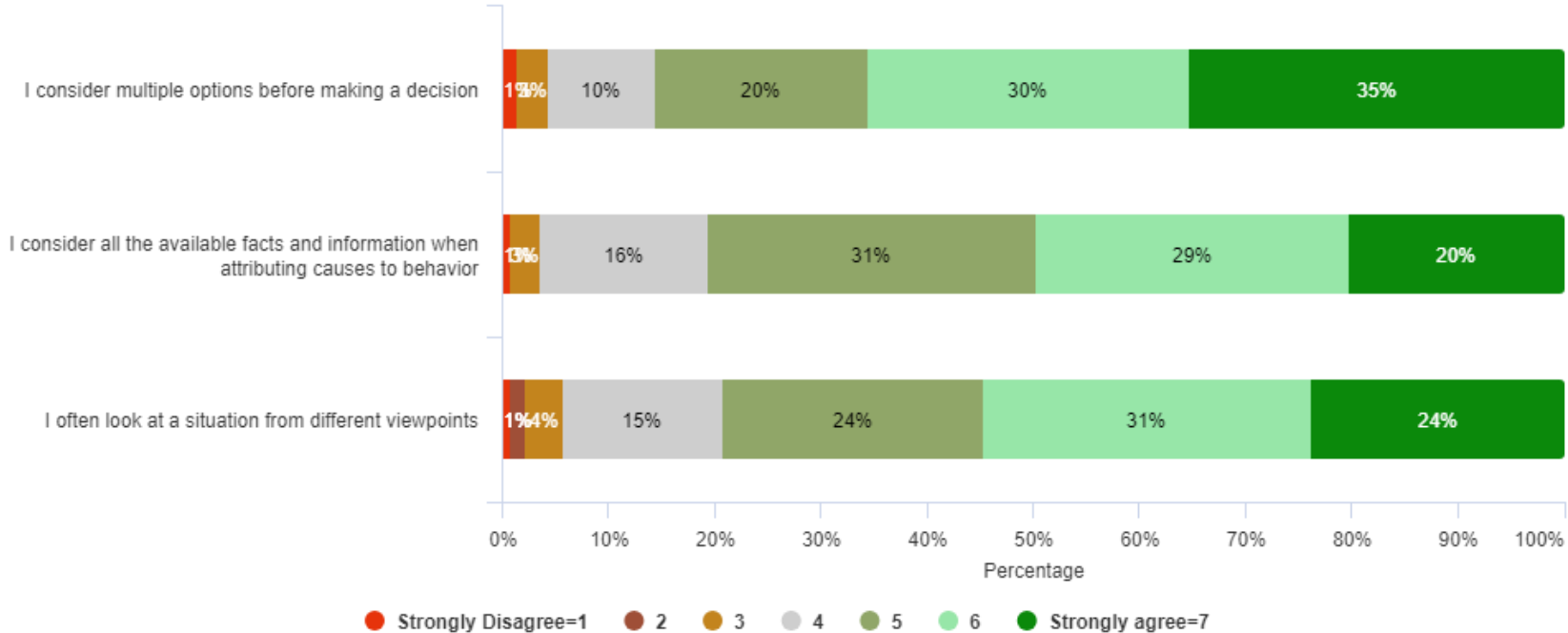
Annex 3: Survey Results for <u>Italy</u> : Technological Practices for Rate and Availability Management on Online Channels

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

Effective responses: 140   Response rate: 99%

Category	Percentage
on several channels at the same time (channel manager)	66%
over a hotel software or reservation system (CRS interface)	32%
manual online	29%
over an agency	7%
others	4%
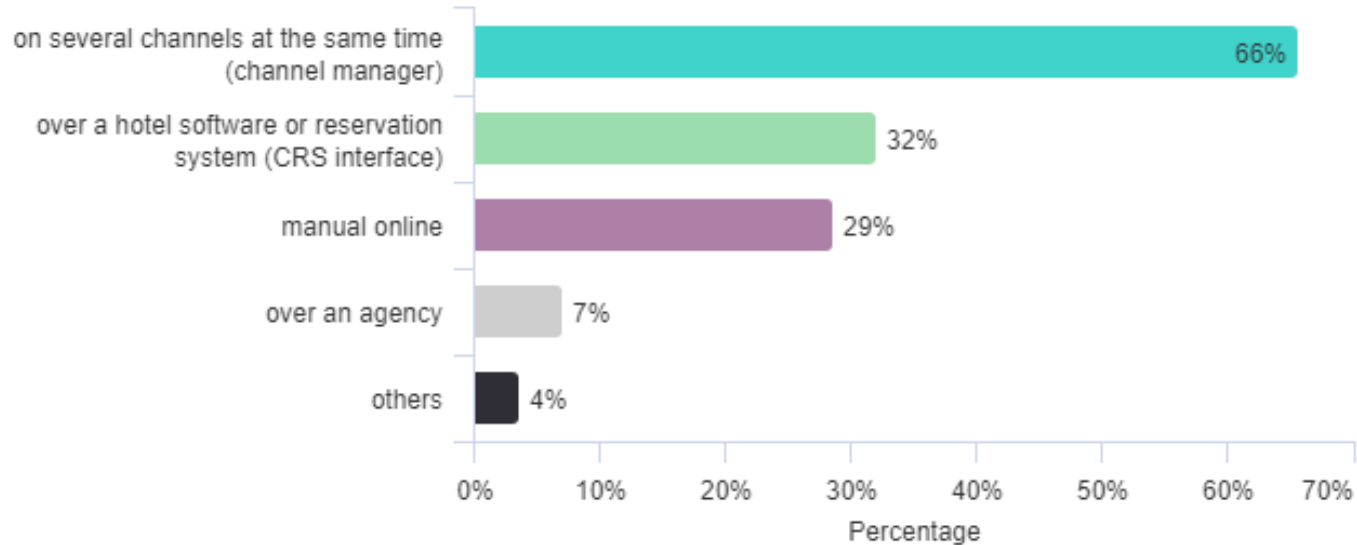
Annex 3: Survey Results for <u>Italy</u> : PMS

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

Effective responses: 135   *Response rate: 96%*

No (17%)

Yes (83%)

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

Effective responses: 104   *Response rate: 74%*

Yes (6%)

No (94%)
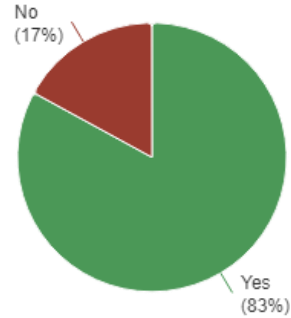
If not, do you plan to acquire a PMS within the next 24 months?

Effective responses: 22   *Response rate: 16%*

Yes (14%)

No (86%)
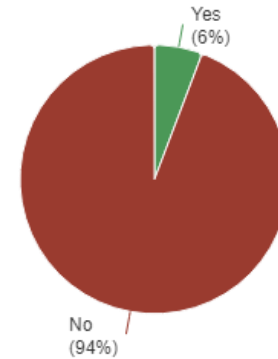
Annex 3: Survey Results for __Italy__ : PMS

Which PMS/Front Office do you currently use?	%		%
5stelle*	25.20%	Little Hotelier	1.70%
ASA	13.40%	RoomRaccoon	1.70%
seekda	7.50%	SysHotel Genius	1.70%
Xenus	5.60%	Vega zucchetti	1.70%
Beddy	3.60%		
Bedzzle	3.60%		
EasyBooking	3.60%		
hotelcube	3.60%		
Kognitiv	3.60%		
protel Cloud	3.60%		
Scidoo	3.60%		
Suite 5 Ericsoft	3.60%		
WELCOME NETERA	3.60%		
Zimmersoftware	3.60%		
Amadeus Property PM PRO	1.70%		
Felix	1.70%		
HS/3 Hotelsoftware	1.70%		

Synthesis: Revenue Management and Distribution Trends in **Italy** :

Hotels in the sample from Italy show **average adoption of revenue management (RM) strategies**, with **49%** of respondents reporting an active RM approach—close to the six-country sample mean. However, **nearly as many (46%) report not using RM**, indicating a **polarized landscape** where a segment of the industry remains underdeveloped in strategic pricing. Among RM adopters, tool usage is more limited: **only 30% use a Revenue Management System (RMS)**, while **68% rely on a PMS**.

Distribution practices in Italy reflect **partial digital maturity**. **66%** of hotels use a channel manager to update availability and rates, slightly below the leaders. However, only **32%** use CRS or hotel software interfaces, and **29% still update rates manually**, a figure significantly higher than in digitally mature countries like France. This suggests ongoing **reliance on manual processes and fragmented systems**.

Italian hotels demonstrate a **balanced but traditional use of performance metrics**. Core indicators such as **occupancy (84%)**, **ADR (67%)**, and **RevPAR (42%)** are frequently tracked, and customer-centric KPIs like **Customer Satisfaction (51%)** and **Direct Booking Ratio (52%)** also show decent uptake. However, **environmental and cost indicators** (e.g., energy use, renewable sourcing, GOPPAR) remain **underrepresented**, hinting at limited engagement with broader performance and sustainability dimensions.

In terms of perceived market positioning, Italian hoteliers express **relatively stable but cautious self-assessments**: **48% believe their profitability is on par with competitors**, and **46% perceive their revenue as similar**. A smaller share (28%) see themselves as slightly better, indicating a **moderate level of confidence** and **limited strategic differentiation**.

Overall, Italy's hotel sector presents a **fragmented picture**: while half the market embraces RM and digital tools, the other half remains behind. To unlock performance gains, Italian hoteliers may need to **invest further in automation, diversify KPI use**, and **extend RM system adoption**—bridging the current digital and strategic divide.
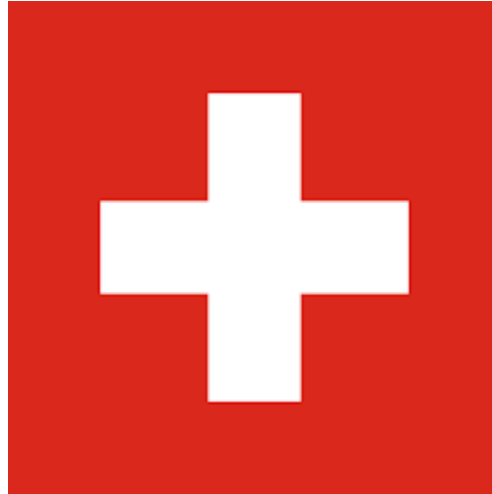
Annex 3: Survey Results for <u>Switzerland</u> : Revenue Management Strategy

Does your hotel currently implement a revenue management strategy?

Effective responses: 181   Response rate: 91%
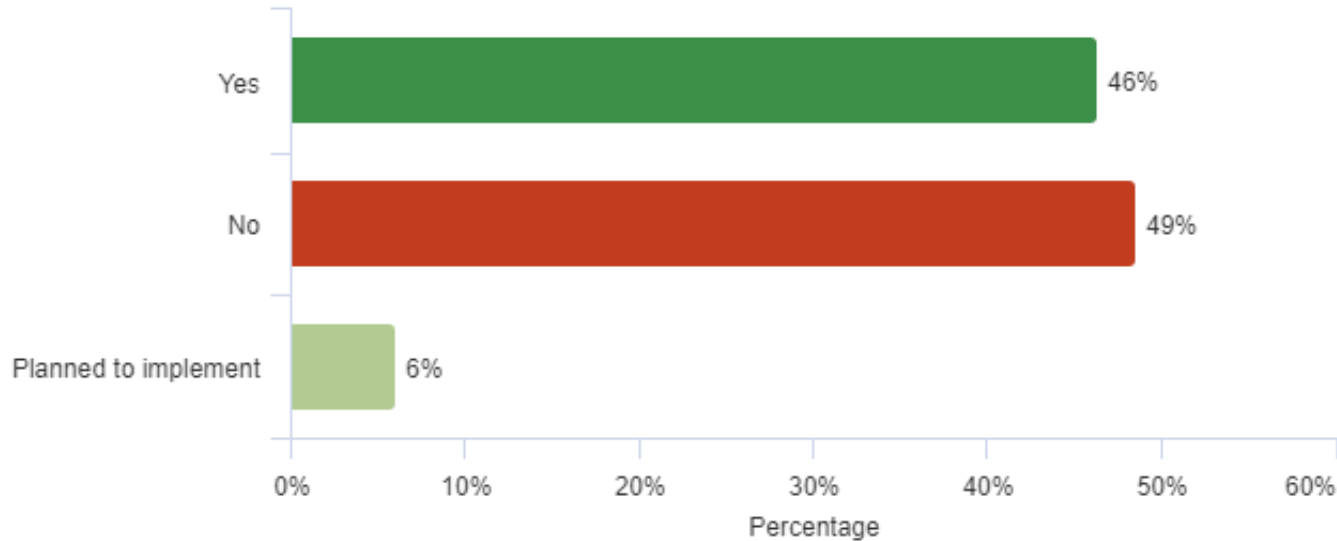
Annex 3: Survey Results for __Switzerland__ : Tools for Revenue Management Strategy Support

If yes, what tools or systems do you use to support your revenue management decisions? (select all that apply)

Effective responses: 84   Response rate: 42%

Tool	Percentage
Property Management System (PMS)	79%
Revenue Management System (RMS)	57%
Excel/Spreadsheets	18%
Third-party consultants	11%
Other	6%
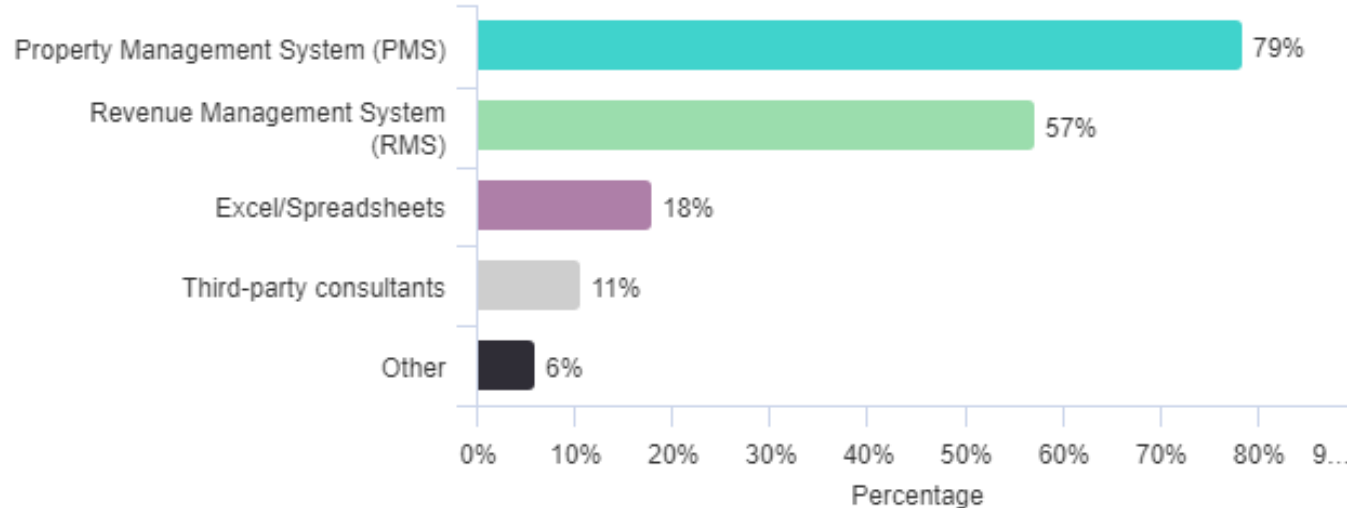
Annex 3: Survey Results for __Switzerland__ : Use of KPIs

Which KPIs (Key Performance Indicators) do you actively track to evaluate your hotel's performance? (select all that apply)

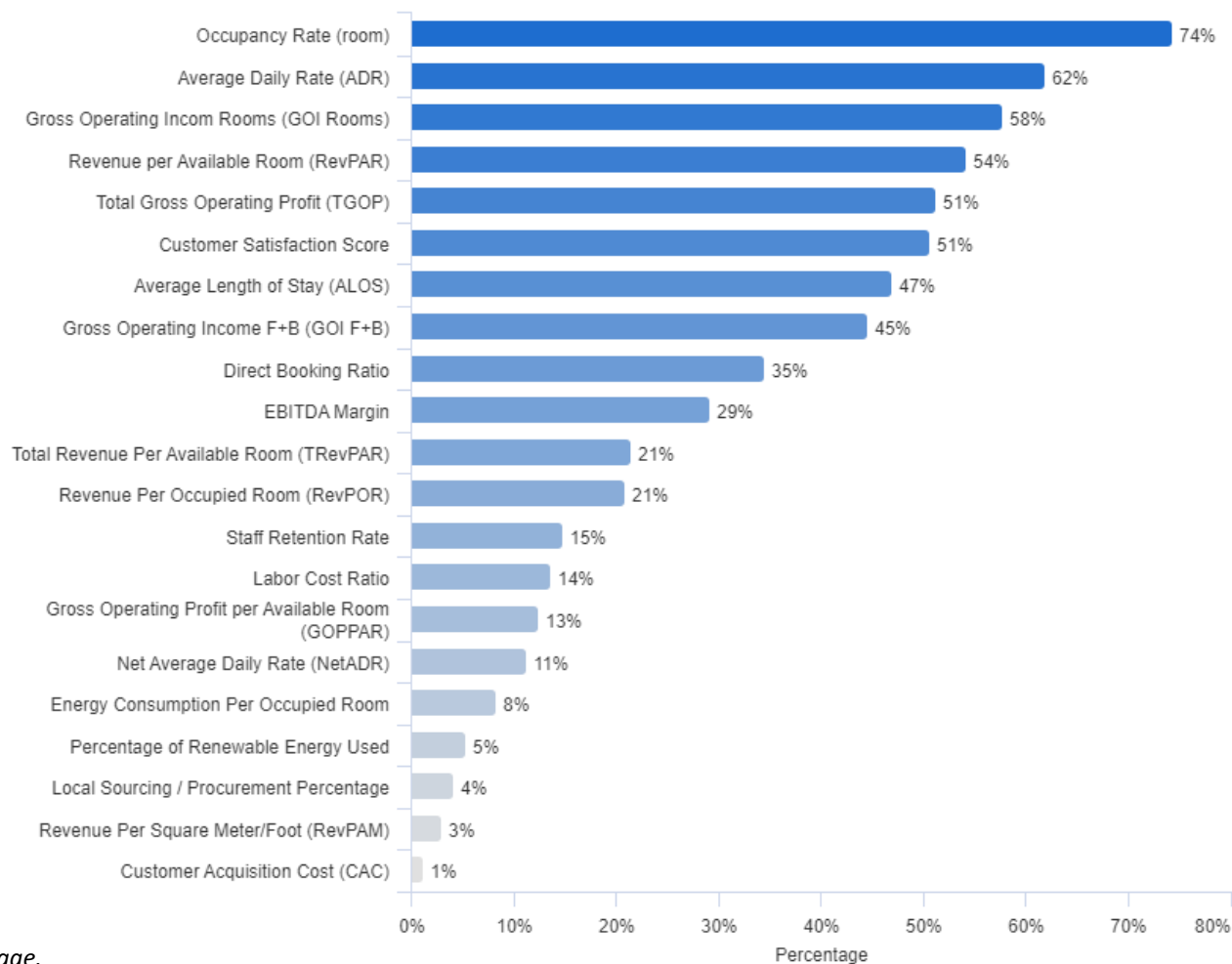| KPI	Percentage
Occupancy Rate (room)	74%
Average Daily Rate (ADR)	62%
Gross Operating Incom Rooms (GOI Rooms)	58%
Revenue per Available Room (RevPAR)	54%
Total Gross Operating Profit (TGOP)	51%
Customer Satisfaction Score	51%
Average Length of Stay (ALOS)	47%
Gross Operating Income F+B (GOI F+B)	45%
Direct Booking Ratio	35%
EBITDA Margin	29%
Total Revenue Per Available Room (TRevPAR)	21%
Revenue Per Occupied Room (RevPOR)	21%
Staff Retention Rate	15%
Labor Cost Ratio	14%
Gross Operating Profit per Available Room (GOPPAR)	13%
Net Average Daily Rate (NetADR)	11%
Energy Consumption Per Occupied Room	8%
Percentage of Renewable Energy Used	5%
Local Sourcing / Procurement Percentage	4%
Revenue Per Square Meter/Foot (RevPAM)	3%
Customer Acquisition Cost (CAC)	1%

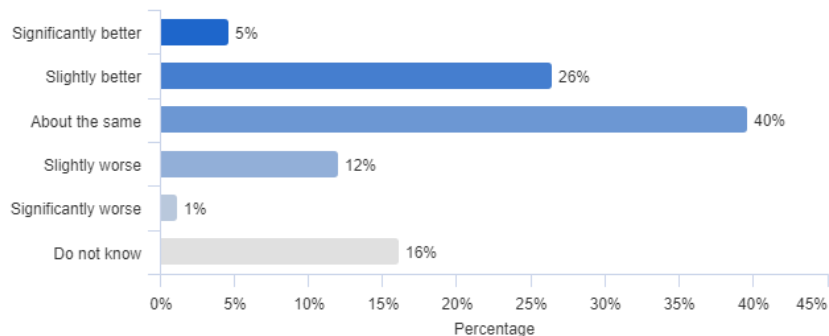*Non-responses are ignored when calculating the percentage.*

Annex 3: Survey Results for <u>Switzerland</u> : Self-Perception of Competitive Position (Revenue and Market Share)

How do you perceive your hotel's revenue performance compared to your competitors?
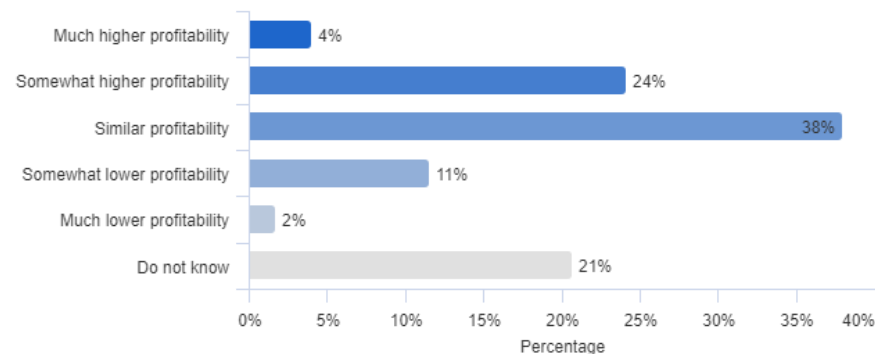
Effective responses: 174   *Response rate: 87%*

- Significantly better — 5%
- Slightly better — 26%
- About the same — 40%
- Slightly worse — 12%
- Significantly worse — 1%
- Do not know — 16%

Percentage

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

Effective responses: 174   *Response rate: 87%*

- Much higher profitability — 4%
- Somewhat higher profitability — 24%
- Similar profitability — 38%
- Somewhat lower profitability — 11%
- Much lower profitability — 2%
- Do not know — 21%

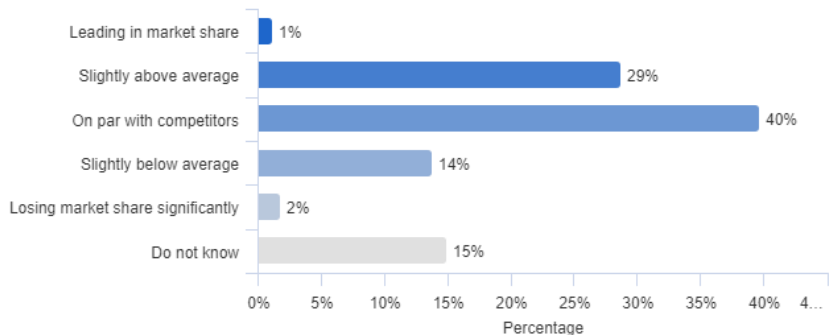Percentage

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

Effective responses: 174   *Response rate: 87%*

- Leading in market share — 1%
- Slightly above average — 29%
- On par with competitors — 40%
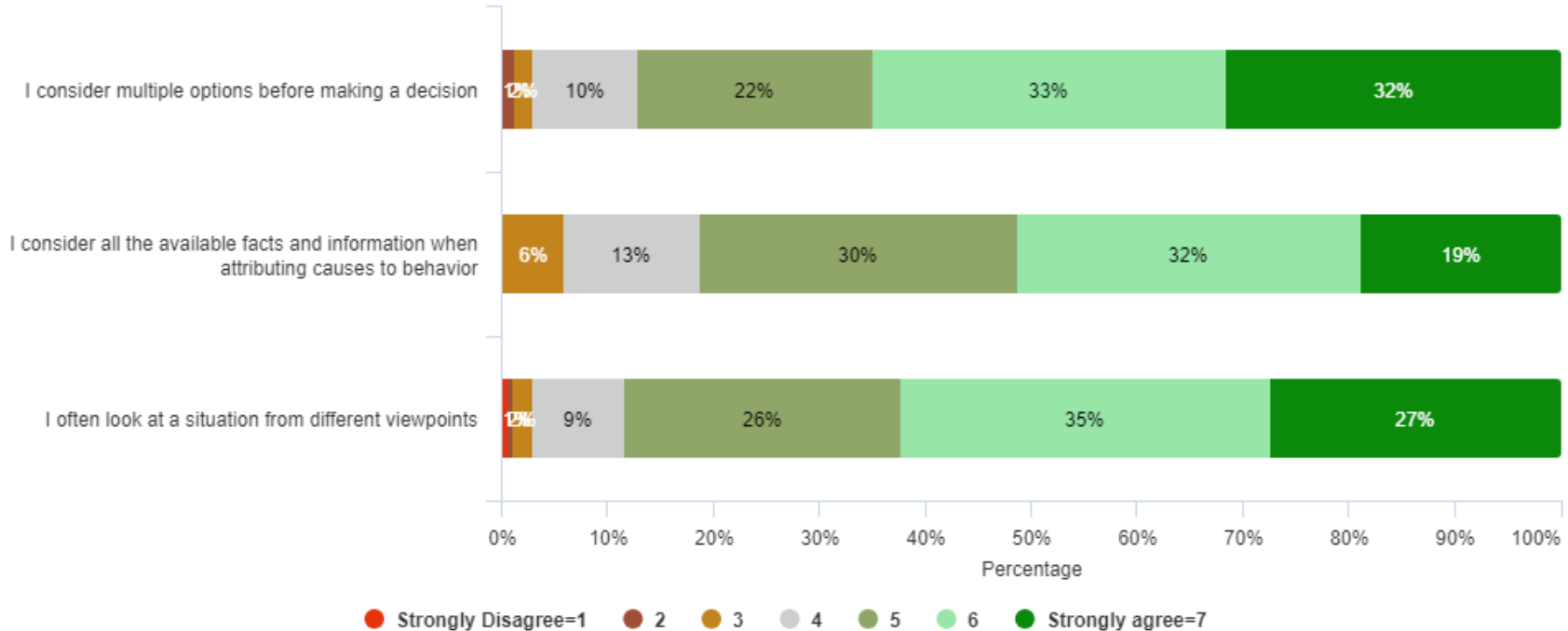- Slightly below average — 14%
- Losing market share significantly — 2%
- Do not know — 15%

Percentage

Annex 3: Survey Results for <u>Switzerland</u> : Decision-Making Orientation and Analytical Thinking in Hotel Management

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

I consider multiple options before making a decision: 1%, 2%, 10%, 22%, 33%, 32%

I consider all the available facts and information when attributing causes to behavior: 6%, 13%, 30%, 32%, 19%

I often look at a situation from different viewpoints: 1%, 2%, 9%, 26%, 35%, 27%

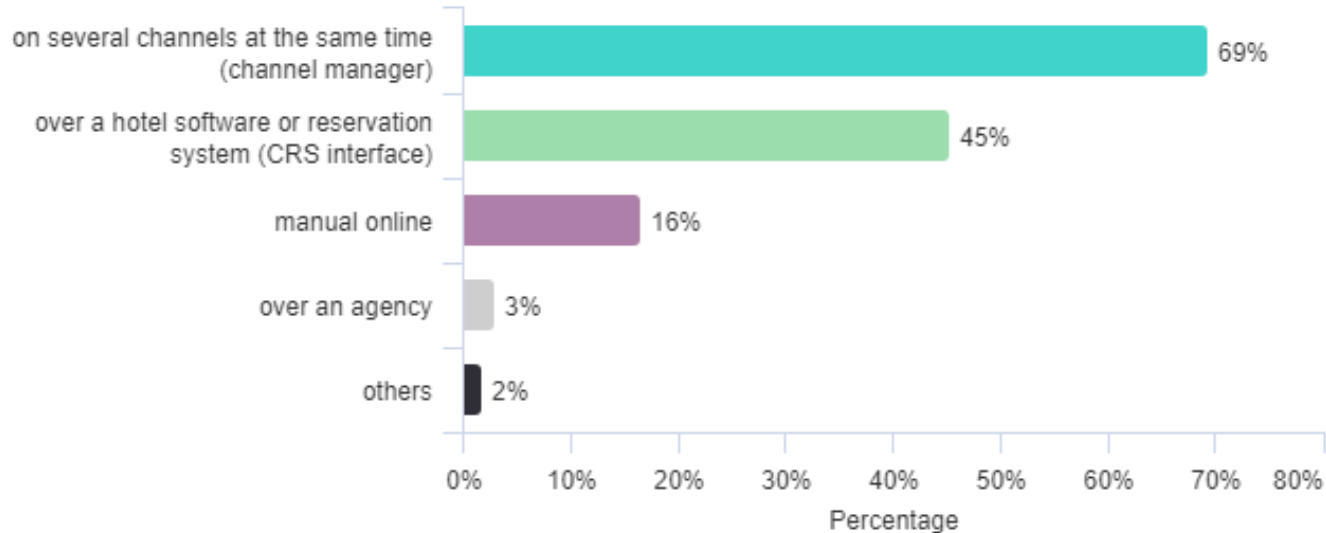Legend: Strongly Disagree=1, 2, 3, 4, 5, 6, Strongly agree=7

Annex 3: Survey Results for <u>Switzerland</u> : Technological Practices for Rate and Availability Management on Online Channels

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

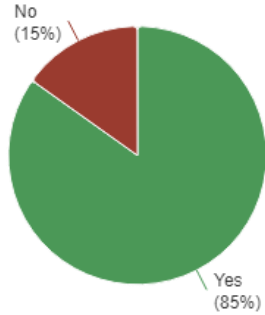Effective responses: 170

Response rate: 85%

Annex 3: Survey Results for <u>Switzerland</u> : PMS

Do you work with a PMS (Property Management System) / Front Office system?
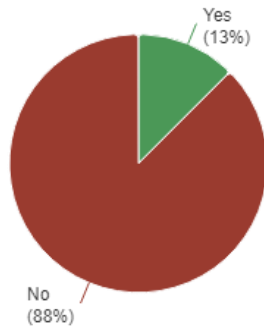
Effective responses: 165   *Response rate: 83%*

No (15%)
Yes (85%)

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

Effective responses: 132   *Response rate: 66%*
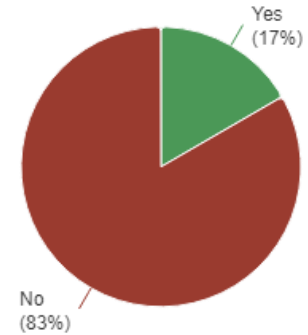
Yes (17%)
No (83%)

If not, do you plan to acquire a PMS within the next 24 months?

Effective responses: 24   *Response rate: 12%*

Yes (13%)
No (88%)

Which PMS/Front Office do you currently use?	%		%
protel Cloud	19.30%	RoomRaccoon	1.40%
Mews	14.80%	Sihot	1.40%
protel on-premsies (SPE/MPE)	14.10%	5stelle*	0.60%
Hogatex	6.60%	Amenitiz	0.60%
Casy	4.40%	Arhon	0.60%
Oracle fidelio Suite 8	3.60%	Bookingplanner by Stardekk	0.60%
Oracle Opera	3.60%	Cloudbeds	0.60%
Aida	2.90%	easy Guestmanagement	0.60%
Apaleo	2.90%	Guestline	0.60%
3RPMS Hotelsoftware	2.10%	Hotelmeister	0.60%
HS/3 Hotelsoftware	2.10%	HotelPartner	0.60%
beds24	1.40%	ibelsa	0.60%
Betisoft	1.40%	Kognitiv	0.60%
Book.World booking management	1.40%	SAP Business One 4 Hotels	0.60%
Clock	1.40%	seekda	0.60%
EasyBooking	1.40%	StayNTouch	0.60%
Gastrodat	1.40%	Swiss Hotel Software SHS	0.60%
HotelPac	1.40%	WuBook	0.60%
Misterbooking	1.40%	Zimmersoftware	0.60%

Synthesis: Revenue Management and Distribution Trends in **Switzerland** :

Hotels in the Swiss sample show a **moderate level of adoption** of revenue management (RM) strategies. With 46% of respondents implementing an active RM strategy, Switzerland is just below the average across the six countries surveyed. An additional 6% report plans to implement one, while nearly half (49%) are currently not using any RM approach.

However, Swiss hotels demonstrate **strong technological adoption** when a strategy is in place. Among those applying RM, 79% use a Property Management System (PMS) and 57% use a Revenue Management System (RMS)—both figures higher than the sample average. Only 18% rely on Excel and 11% on third-party consultants, suggesting a preference for integrated digital tools over manual or external solutions.

Swiss hotels also display a **robust usage of performance metrics**. Leading KPIs include Occupancy Rate (74%), ADR (62%), and Gross Operating Income Rooms (GOI Rooms, 58%). Financial performance indicators such as RevPAR (54%), TGOP (51%), and EBITDA (29%) are tracked more frequently than in some other countries. Yet, the adoption of environmental and sustainability KPIs (e.g., renewable energy, local sourcing, customer acquisition cost) remains relatively low (5% or below), indicating room for improvement in ESG-aligned performance tracking.

In terms of **distribution technology**, Swiss hotels are highly digitized: 69% use a channel manager and 45% update availability via a hotel software or CRS interface. Manual updates are less common (16%), pointing to a relatively advanced level of **digital maturity** in managing online channels.

Regarding **competitive self-perception**, Swiss hoteliers appear somewhat conservative. Only 31% believe their revenue or profitability is above that of competitors, and just 30% assess their market share as slightly above average or leading. A significant share either considers themselves on par (40%) or is unsure (15–21%), suggesting that despite having strong tools and practices, Swiss hoteliers tend to be cautious in claiming competitive advantage.

Overall, Switzerland presents a profile of **solid operational infrastructure with conservative strategic outlooks**. High levels of PMS/RMS integration and KPI usage contrast with modest competitive self-assessments. Future priorities could include enhancing strategic confidence, broadening sustainability metrics, and leveraging data for stronger differentiation.