

From Awareness to Action: AI Readiness in Hotels

Results of an Online Survey among European Hotels

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> Executive Summary

Executive Summary (I)

- The study, a follow-up to previous surveys (in October 2023 und July 2025), aimed to assess the strategic and operational readiness for AI adoption among European hotels, which are predominantly small and mid-sized establishments. The study findings highlight a significant **gap between AI awareness and formal strategic implementation**: 40% of respondents are discussing AI within broader digitalization efforts, yet only 9% have a formal strategy document.
- The **dominant approach remains scattered experimentation** with 35% of hotels testing AI tools on a case-by-case basis and 31% following trends without clear objectives.
- Efforts are primarily **hindered by structural and knowledge-based barriers**: a lack of time and budget, limited technical expertise, and difficulty in evaluating suitable AI providers.
- A **significant gap remains regarding confidence in data quality and the ability to evaluate the return on investment (ROI) of AI solutions**.

Internal Catalysts for success

- **Strategic, value-driven AI integration**
- **Targeted capacity-building & robust evaluation frameworks**
- **Stronger data infrastructures**

Executive Summary (II)

- 72% of respondents consider AI important for their hotel's success within the next two years.
- Hoteliers **prioritize leveraging AI to solve key operational pain points:** administrative workload, communication across multiple channels, revenue management and forecasting.
- Hotels show a **clear demand for external support:** trusted, vendor-neutral guidance, best practices, training programs.

External Support wanted

- **Strategic, value-driven AI integration**
- **Targeted capacity-building & robust evaluation frameworks**
- **Stronger data infrastructures**



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> The Survey

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The survey: background

- This study builds on previous surveys conducted
 - in 2023 by Khlusevich & Schegg: *AI in Tourism: Unveiling the Potential and Benefits for SMEs in the Hotel Sector. Results of an online survey among hotels in Austria, France, Germany, Greece and Switzerland* ([LINK](#))
 - in 2025 by Schegg: *Artificial Intelligence in European Hotels: Adoption, Applications, and Barriers. Results of an Online Survey among Hotels in Austria, France, Germany, Greece, Italy and Switzerland* ([LINK](#))
- Following the broad European AI in Hospitality Study published in July 2025, which gathered insights from over 1,500 hotels, this **follow-up survey** was launched to dive deeper into hotels' strategic and operational readiness for AI adoption. By **re-engaging participating hotels** with an e-mail (n=408), the goal is to move beyond general awareness and **explore the specific conditions, barriers, and enablers shaping successful AI implementation at the property level.**
- The survey investigates **digital strategies, internal capabilities, perceived obstacles, external support needs**, and future investment plans. It aims to identify actionable pathways and support measures that can help hotels move from experimentation to structured and effective AI integration in daily operations.
- This study was conducted by HES-SO Valais and Hagen Britz 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.

Methodology: questionnaire

- We opted for an **online survey** as our primary data collection tool to gather insights into the current landscape of the hotel sector. The overall questionnaire ([see Annex 1](#)) consists of 13 targeted questions, combining closed and open formats.
- Topics covered include:
 - Level of AI awareness among staff and management
 - Integration of AI into business and digital strategies
 - Concrete use cases and tools already in use
 - Organizational preparedness (skills, leadership, culture)
 - External factors such as vendor support and regulatory concerns
 - Perceived opportunities, risks, and resource needs

Methodology: survey administration

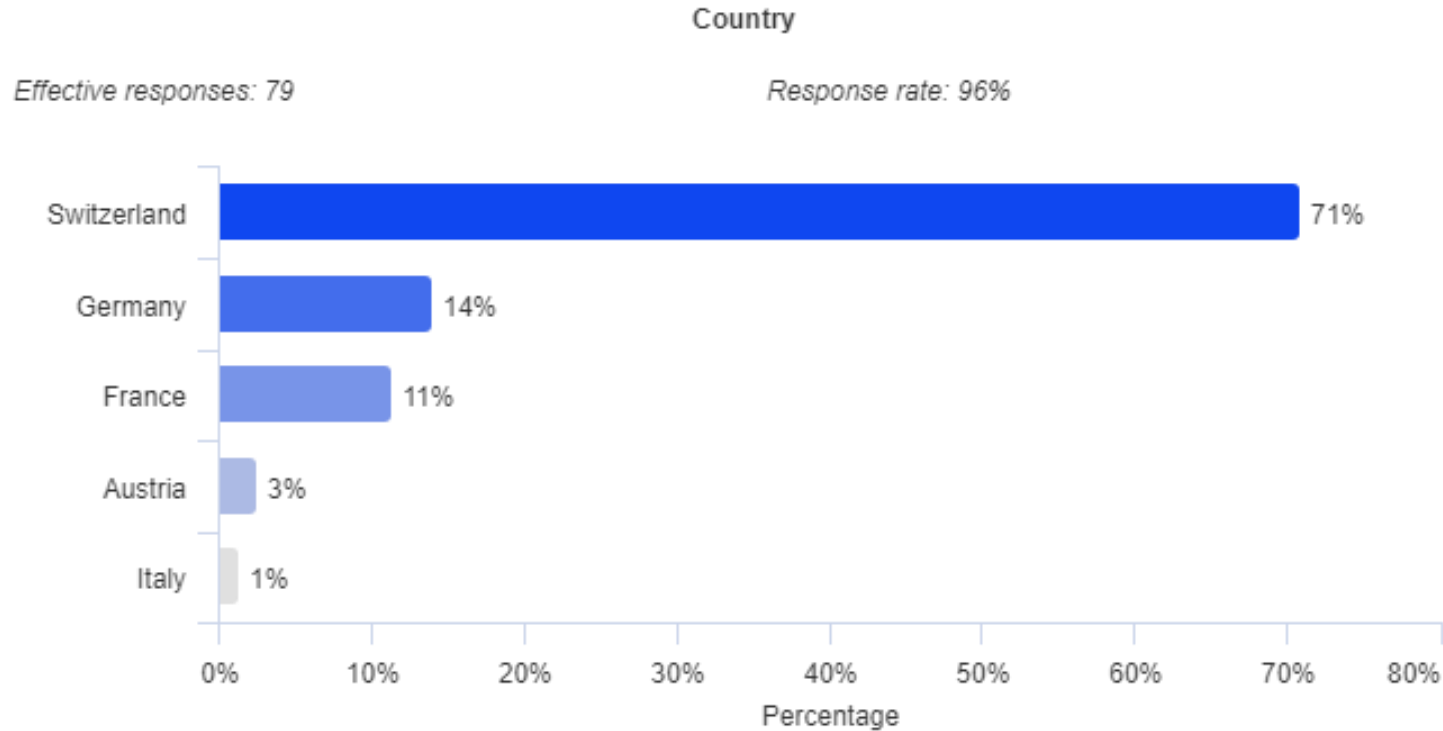
- The questionnaire was translated in 3 languages : French, German, English.
- The survey was addressed **between July to September 2025** to 408 hoteliers who participated in the last AI survey. Additionally, some 80 hotels have been contacted in Switzerland via LinkedIn or by mail.
- As not all hotels replied to all questions, the number of responses can vary from one to another question.
- The **results should be interpreted with some caution**, as the sample is not fully representative of the hotel sector as a whole. Most participating hotels had already taken part in a previous AI survey and are likely to be more digitally aware or interested in AI than the average hotel. This may lead to an upward bias in AI awareness, experimentation, and readiness, and the findings may overestimate the current adoption levels across the broader industry.



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➤ The Sample

Sample: Country



Sample: Size of Hotels (Nbe of Rooms)

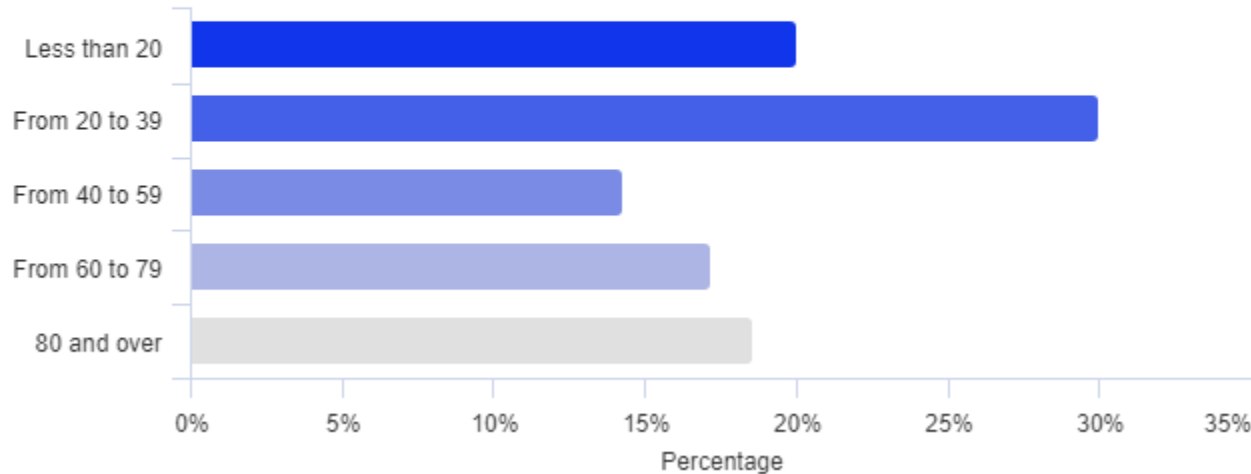
Size of your hotel (nbe of rooms)

Effective responses: 70

Median: 37.5

Mean: 66.1

Min - Max: 4.0 - 800.0



The sample is predominantly composed of small and mid-sized hotels, with the highest share falling in the 20–39 room category. The median size is 37.5 rooms, indicating a strong representation of independent, often family-run establishments. While some larger properties are included, the majority of respondents reflect the structure of the Swiss and DACH hotel landscape, where smaller units dominate.



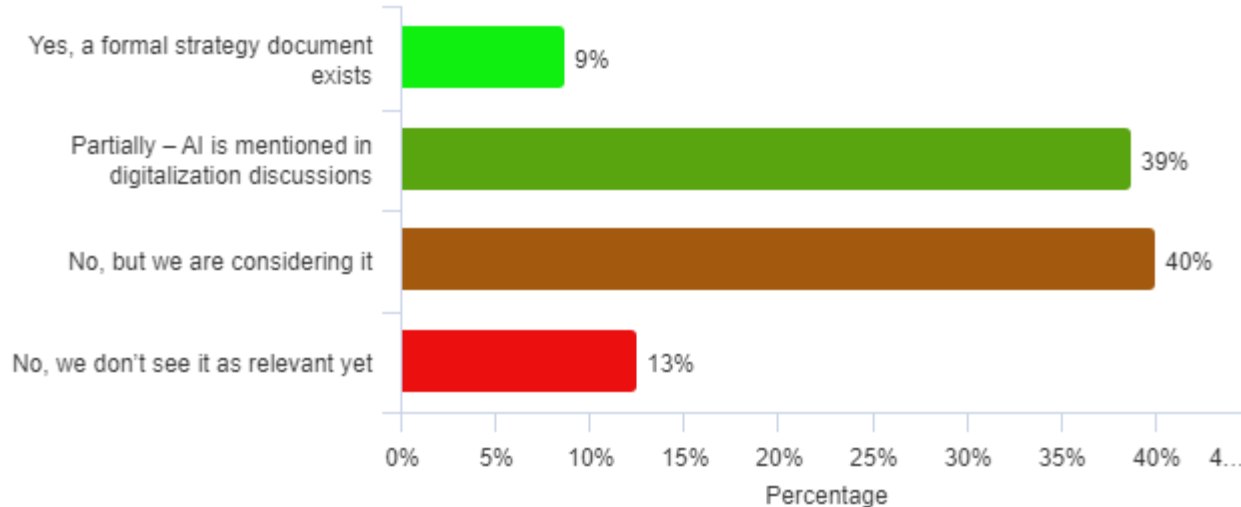
**> Strategic AI
Orientation**

Digital strategy with AI Focus and Automation

1. Does your hotel have a digital strategy that explicitly includes AI or automation topics?

Effective responses: 80

Response rate: 98%



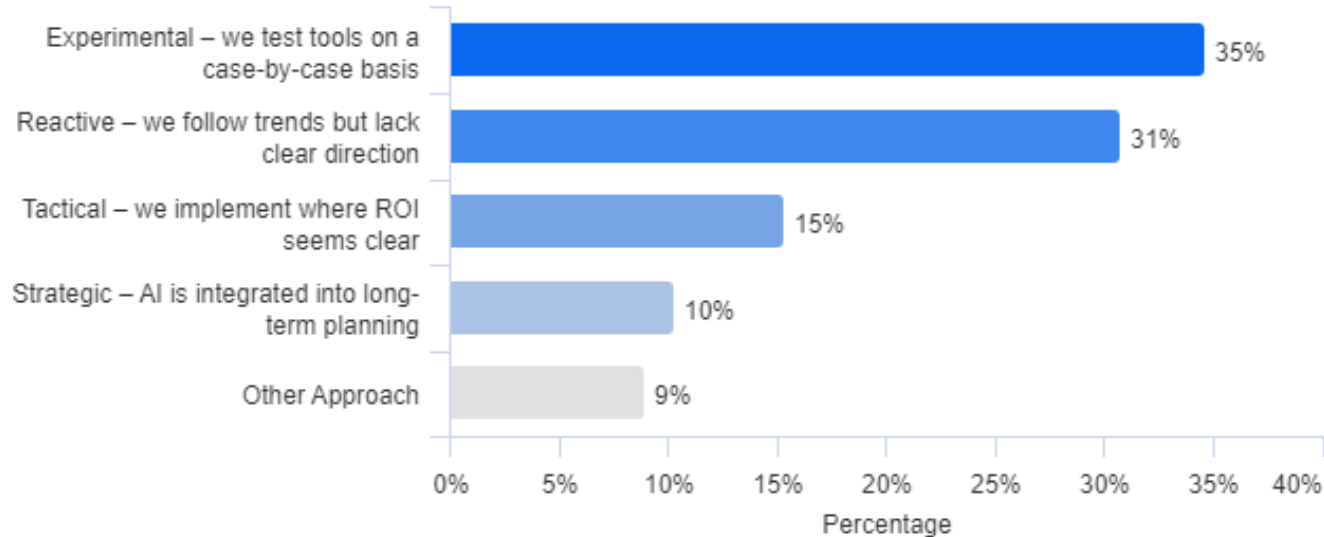
The chart highlights a clear gap between awareness and formalization: while nearly 40% of respondents are discussing AI and automation within broader digitalisation efforts, only a small minority (9%) have anchored these topics in a formal strategy document. Encouragingly, another 40% are considering it, suggesting momentum is building—but structured implementation remains limited. This underlines the need for clearer frameworks and support to move from intention to action.

Current approach to AI in hospitality

2. How would you describe your current approach to AI in hospitality?

Effective responses: 78

Response rate: 95%



The majority of hotels are currently operating in experimental or reactive mode: 35% are testing AI tools on a case-by-case basis without an overarching strategy, while 31% are following trends but without clear objectives. Only 10% of the hotels surveyed have strategically integrated artificial intelligence into their long-term planning. **Conclusion:** A rather **opportunistic approach** to AI currently dominates. In many places, there is **a lack of strategic clarity, systematic evaluation and organisational embedding** – there is a need for action here for future-oriented development.

Current approach to AI in hospitality: other approaches mentioned

The qualitative responses reveal distinct patterns among hotels not following standard AI adoption strategies:

Cautious or Passive Stance

Some hotels remain **attentive but reactive**, citing a **lack of expertise** or knowledge as a barrier (“manque de savoir-faire”).

Others **do not yet see AI as useful** or have **no defined approach**, highlighting low perceived relevance or readiness.

External Initiatives

One hotel is part of an **external pilot program**, indicating top-down innovation rather than internally driven AI strategy.

Pragmatic and Experimental

One respondent describes a **pragmatic dual-track approach**: using AI where it brings clear value (automation) and **creating internal learning spaces** (e.g., with ChatGPT) to build AI capabilities progressively.

Implication on strategic AI orientation

- **Strategic AI planning is still rare:** Most hotels lack a formal digital strategy that includes AI, resulting in fragmented and uncoordinated initiatives.
- **Experimentation dominates:** Hotels are open to innovation but often act without long-term direction, which limits scalability and ROI.
- **Support needed for strategic shift:** Clear frameworks, ROI models, and peer learning can help move from reactive testing to structured, value-driven AI integration.
- **Call to action for industry bodies:** Provide tailored strategic templates, promote capacity-building, and foster a community of practice to accelerate meaningful adoption.



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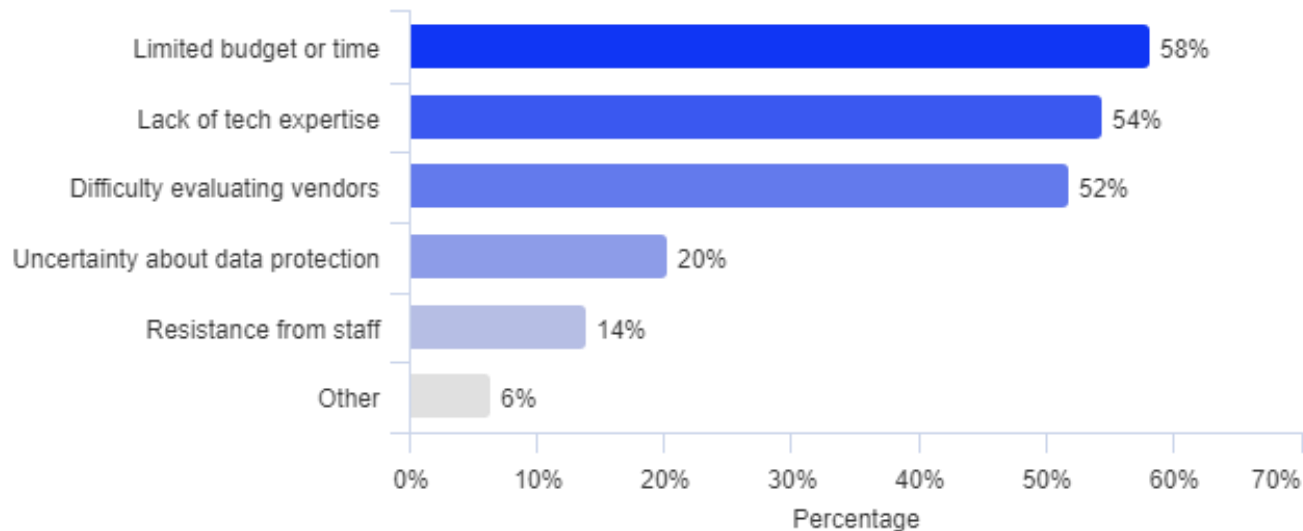
> AI Implementation and Internal Capabilities

Limiting internal resources for broader AI use

3. Which internal skills or knowledge are currently limiting broader AI use in your hotel?

Effective responses: 79

Response rate: 96%



The main internal barriers to expanding AI use in hotels are not attitudinal, but structural and knowledge-based. A lack of time and budget, limited technical expertise, and difficulty in evaluating suitable AI providers create a bottleneck for implementation. These findings underline the need for targeted capacity-building, trusted vendor guidance, and easy-to-integrate tools to move from experimentation to scaling. Data protection concerns and staff resistance play a smaller but still notable role, indicating that awareness and communication remain important.

Limiting internal resources for broader AI use: open remarks

The open responses illustrate a **spectrum of internal readiness**, highlighting both **barriers** and **cases of active use**:

- **Change Resistance / Habitual Workflows**

- "*Bestehende Routinen brechen*" indicates difficulty in disrupting established practices—highlighting **cultural inertia** rather than pure skill gaps.

- **Lack of Understanding or Relevance Perception**

- Respondents mention **difficulty grasping AI's utility** ("*Difficultés à appréhender l'utilité...*") and **lack of belief or interest** ("*fehlt noch das Interesse...*"), pointing to **limited AI awareness or perceived value**.

- **No Suitable Solution Identified**

- One hotel notes having **evaluated options (e.g., chatbots) without finding a fit**, suggesting a **disconnect between available tools and actual operational needs**.

- Some respondents **explicitly state they are not limited**, with **daily AI use already integrated** or AI already applied in **yield management**.

- **Implication**

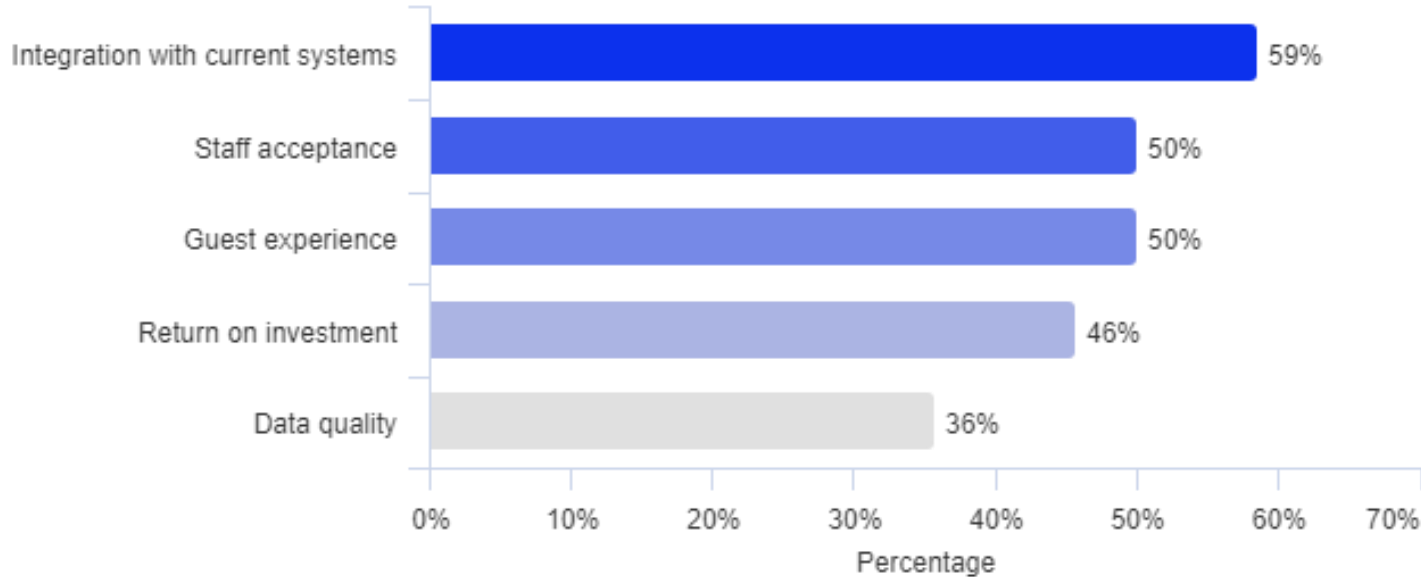
- While **technical skills** may not be the only barrier, **mindset, perceived value, and fit-for-purpose solutions** appear more critical. This suggests a need for **better use-case alignment, peer learning, and hands-on experimentation environments**.

Hotel's ability to implement AI tools

4. How confident are you in your hotel's ability to implement AI tools in terms of...

Effective responses: 70

Response rate: 85%



While over half of respondents feel confident in integrating AI tools with existing systems and gaining staff acceptance, a significant gap remains when it comes to **data quality and ROI**. These weaker confidence levels point to structural issues such as fragmented data infrastructures and unclear value propositions. For broader AI adoption, hotels will need **stronger data governance** and more **evidence-based tools** to evaluate financial returns.

Implication on AI implementation

- The combined results highlight a clear implementation gap in hotels' AI adoption journeys.
- While many hotels feel confident about integrating AI tools into existing systems and securing staff acceptance, fundamental internal barriers—such as lack of tech expertise, limited budgets, and uncertainty in vendor selection—remain significant obstacles.
- Additionally, low confidence in data quality and return on investment indicates the need for stronger data infrastructures and more robust evaluation frameworks. For AI implementation to scale, hotels must invest in internal capacity-building, data governance, and the development of clear, evidence-based ROI tools.



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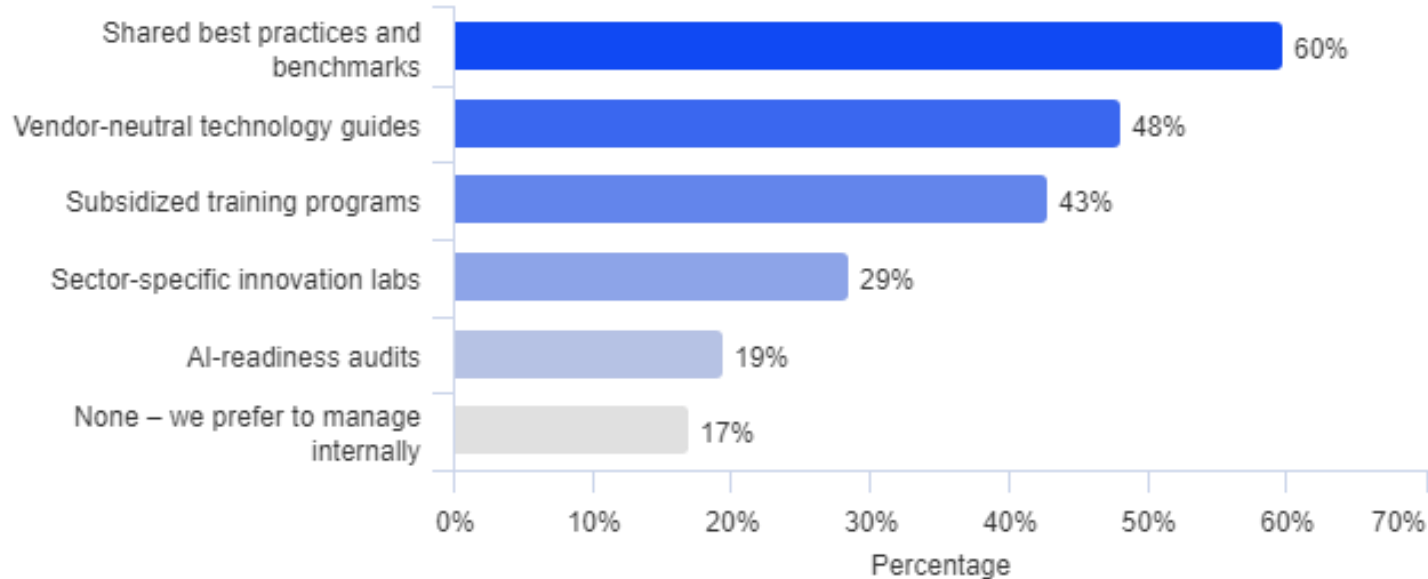
> Support and Ecosystem Needs

External support for AI adoption

5. What types of external support would accelerate your hotel's AI adoption?

Effective responses: 77

Response rate: 94%



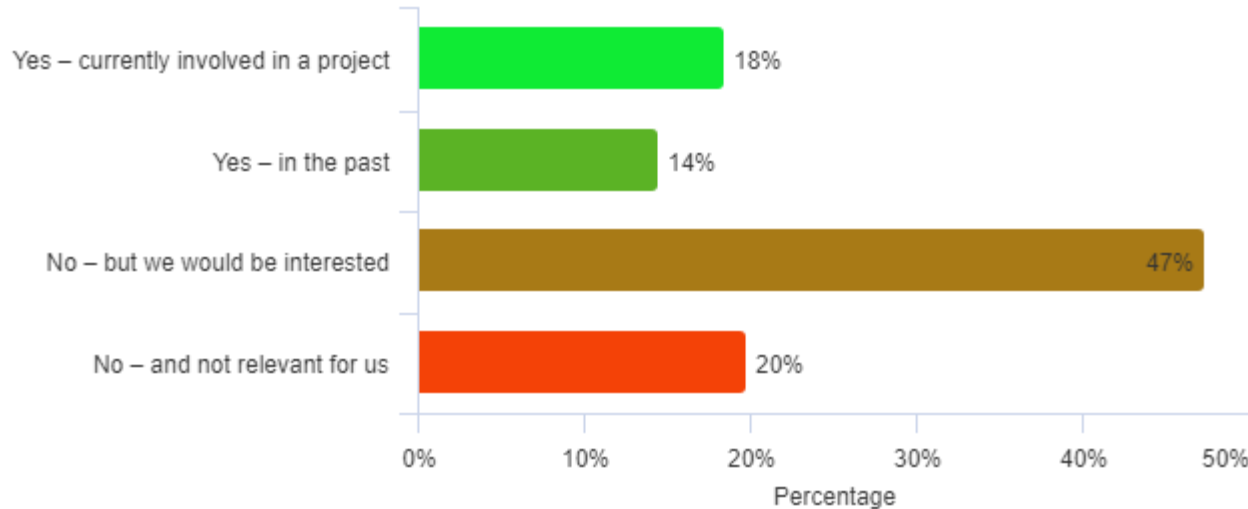
The results show a clear demand for external support in AI adoption. Hotels primarily seek **best practices**, **vendor-neutral guides**, and **training programs**, indicating a need for trusted, practical guidance. The interest in **innovation labs** highlights the value of hands-on learning. Only a minority prefer internal management, suggesting that **collaborative, structured support**—from associations or public programs—can play a key role in advancing AI adoption.

Collaboration with partners for AI implementation

6. Have you collaborated with associations, DMO, or tech providers to implement or pilot AI tools?

Effective responses: 76

Response rate: 93%



Almost half of the respondents express a clear interest in collaborating with external partners—such as associations, DMOs, or tech providers—for AI implementation, although only a minority are currently involved or have done so in the past. This highlights a strong untapped potential for pilot programs and joint initiatives, especially for intermediary organizations looking to foster innovation at scale. The 20% who see no relevance also indicate the need for better communication of AI's concrete benefits in hospitality.

Implications on the role of partners in AI adoption

The findings clearly highlight that **external partners—such as associations, DMOs, and tech providers—play a critical enabling role** in the AI adoption journey of hotels.

Strong demand for structured support: The majority of hotels are looking for external guidance in the form of best practices, vendor-neutral guides, and practical training programs. This underlines the importance of intermediaries acting as **trusted knowledge brokers and facilitators** of learning.

High untapped collaboration potential: Nearly half of the hotels are interested in partnerships but are not yet involved in any. This reveals an opportunity for **pilot projects, innovation hubs, and joint initiatives** to accelerate adoption, especially among smaller or less digitally mature hotels.

Need for better communication of relevance: The 20% who perceive AI as “not relevant” point to a **communication and awareness gap**, suggesting that intermediaries must also invest in **showcasing tangible, sector-specific benefits** of AI in hospitality.

Conclusion: For AI adoption to scale meaningfully in the hotel sector, **collaborative ecosystems**—built around intermediaries providing hands-on guidance, neutral platforms, and capacity-building—are essential. Public-private partnerships and DMO-led initiatives can play a **pivotal catalytic role**.



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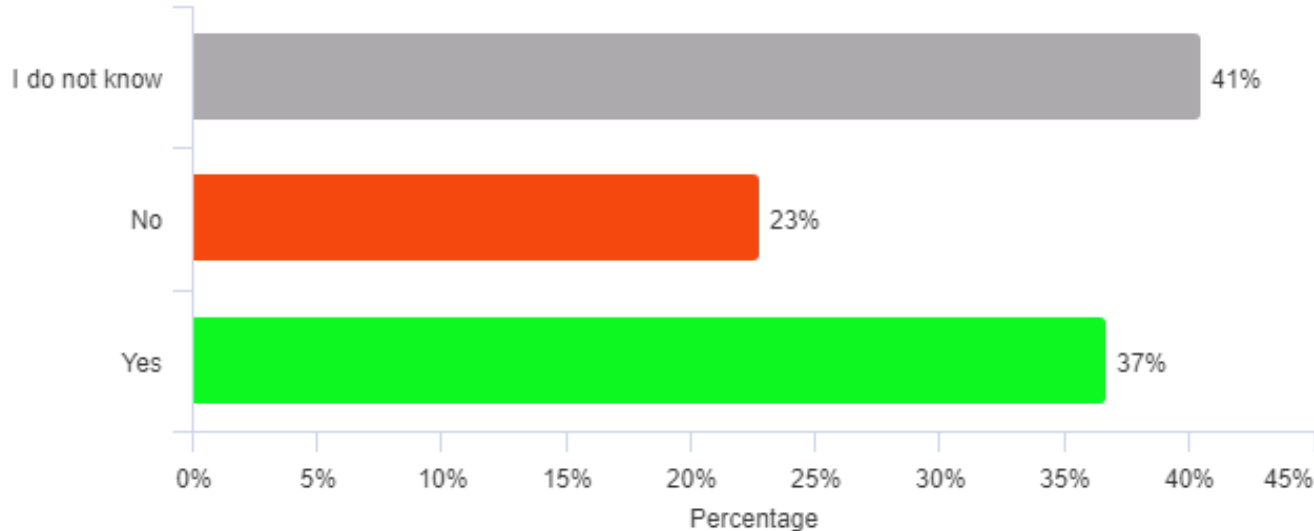
> Future Outlook

AI plans for next 2 years

7. Over the next 2 years, have you planned any concrete investments into predictive or generative AI?

Effective responses: 79

Response rate: 96%



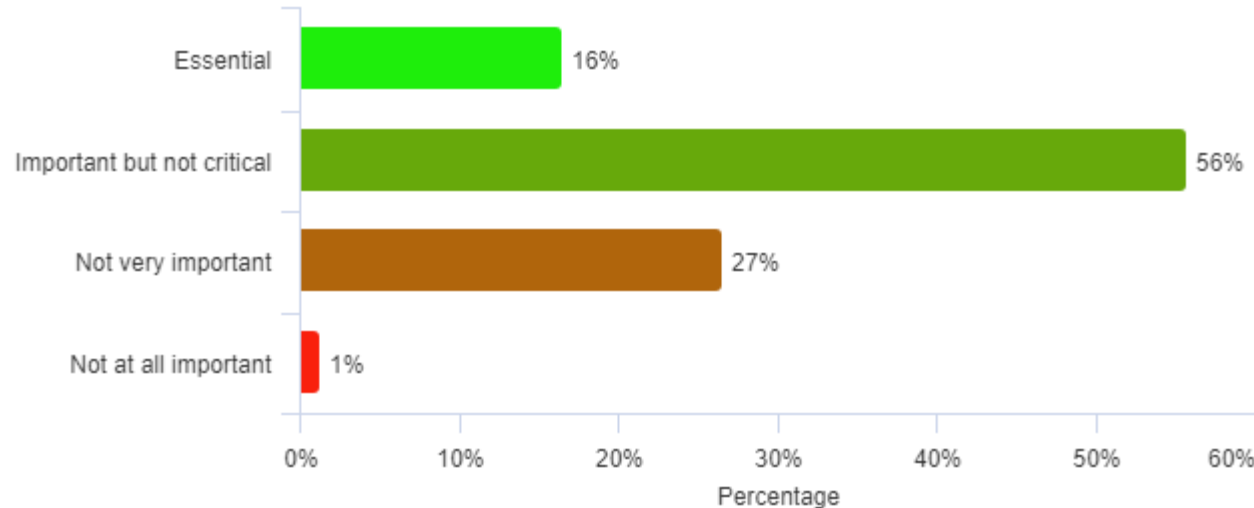
The results indicate a mixed outlook regarding future investments in predictive or generative AI in hospitality. While 37% of respondents plan to invest in such technologies, a significant portion (41%) remains uncertain. This high level of indecision points to a need for **clearer strategic guidance, better ROI evidence, and practical use cases** to inform decision-making. The 23% who do not foresee investments may reflect **resource constraints or skepticism**, underscoring the importance of targeted support and awareness-raising efforts. Overall, the data suggests that while momentum is building, **AI planning remains fragmented and cautious** across the sector.

Importance of AI success

8. Over the next 2 years, how important will AI be for your hotel's success?

Effective responses: 79

Response rate: 96%



A majority of respondents (72%) consider AI at least **important** for their hotel's success in the next two years, though only 16% view it as **essential**. This suggests that while there is growing recognition of AI's strategic relevance, it is still often seen as a **complementary rather than critical** element. The 27% who consider it not very important may reflect operational or resource constraints, or limited awareness of AI's potential. These findings imply a need for stronger **value framing**, showcasing **tangible benefits** of AI to move it from a 'nice-to-have' to a **core enabler** of hotel performance.

Problems that hotels would like to solve with AI

- **Administrative workload is the top pain point:** Respondents clearly hope AI can reduce manual, repetitive work—especially in accounting, booking management, or staff planning.
- **Communication overload is widespread:** Many hotels struggle with managing multiple channels (emails, booking platforms, messaging apps) and see AI (e.g., chatbots, auto-replies) as a way to streamline this while maintaining quality.
- **Revenue management and forecasting are top strategic priorities:** Hotels wish to go beyond spreadsheet-based planning and tap into predictive AI for yield optimization, demand prediction, and price setting.
- **Small hotels face tech integration issues:** One detailed response from a boutique hotel underlines the complexity of syncing multiple tools across operations—and the need for AI as a "smart connector" rather than just another tool.
- **Some answers reflect experimentation or early adoption:** A few respondents indicated they are currently implementing solutions (e.g., robotic process automation, chatbot integration) but still await results.

Implications for future evolution

The results reflect a cautious but growing interest in AI across the hotel sector. Despite strong recognition of AI's potential (72% see it as important), only a minority are planning concrete investments (37%), and 41% remain undecided. This gap signals a need for clear strategic frameworks, integration support, and proof of value.

The open answers reveal a strong demand for AI to relieve operational pain points like admin overload, communication flow, and forecasting—suggesting high potential if solutions are tailored to these needs.

Looking forward, AI adoption will likely accelerate, but only if providers and partners address current fragmentation, resource gaps, and the integration complexity faced by smaller players.



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> Conclusions and discussion

Key Insights from Survey (I)

Strategic Readiness

- Many hotels are still in a reactive or exploratory phase
- Few have formal AI strategies; experimentation dominates
- Strategic clarity and leadership engagement remain limited

Implementation Capacity

- Strong willingness to experiment but hampered by
 - Lack of time, technical skills, integration capacity
 - Data quality & ROI evaluation challenges
- Small hotels particularly face tech integration issues

External Support & Ecosystem Needs

- High demand for vendor-neutral guidance, training, and case studies
- Few active collaborations, but strong interest in pilot projects
- Trusted intermediaries (DMOs, associations) can play a catalytic role

Key Insights from Survey (II)

What's next?

- Momentum is building: 72% see AI as important, but only 37% plan concrete investments
- Caution dominates due to lack of internal readiness and clear value framing
- Use of AI remains focused on pain points (admin, communication, forecasting)

Recommendations

- **Build capacity:** Offer hands-on training, foster internal experimentation
- **Strengthen the case for AI:** ROI evidence, peer learning, tailored use cases
- **Support strategic planning:** Provide templates, roadmaps, and advisory services
- **Foster collaboration:** Pilot projects, innovation labs, and public-private partnerships

● *From scattered experimentation to structured adoption: the sector needs guidance, capacity, and trusted partnerships to move forward.*

The Risk: Experimentation Without Transformation

- Our survey shows that **experimentation dominates** the current approach, with 35% of hotels testing AI tools on a case-by-case basis without an overarching strategy, and 31% merely following trends. This approach, while **demonstrating openness to innovation**, is globally recognized as a **familiar pitfall from the digital transformation era**.
- Recent comprehensive research indicates that 95% of investments into generative AI (GenAI) pilots produce zero measurable return. **Enterprises pursuing these scattered pilots often fail to create meaningful value or scale solutions**, leading many to eventually abandon their efforts.
- The **primary barrier preventing hotels from achieving measurable returns (ROI) is not a lack of willingness, but structural deficiencies**: low confidence in data quality, limited technical expertise, and an inability to correctly evaluate potential vendors. This reflects the **global phenomenon of the GenAI Divide**, where only 5% of integrated, task-specific AI solutions reach production and deliver sustained value.

Reframing Value: From Pilots to Process Alignment

- To escape this trap, hoteliers must fundamentally shift their focus from technology outputs to measurable business value.
- GenAI is a technology of "many right answers" (useful outputs) rather than "one right answer" (correctness). **Success requires leaders to embrace an "Alien Mindset," prioritizing usefulness and continuous adaptation over static, easily measured outputs.**
- The current hotel pain points identified in this study—administrative workload, communication overload, and sophisticated revenue forecasting—are precisely where the highest ROI potential often resides, particularly in back-office efficiencies. However, external studies show **investment bias typically favors visible front-office tools (like sales and marketing) over the less visible but highly transformative back-office functions.**
- Hotels must resist this bias and target AI investments at relieving core operational friction identified by staff.

Recommendations for Crossing the GenAI Divide

To transition from sporadic testing to structured, value-driven integration, the hotel sector must adopt the proven strategies of organizations successfully crossing the GenAI Divide:

- **Focus on Customer and Core Transformation:** Experiments should not be random technical exercises. They must be connected directly to a true business opportunity: transforming the core business to better serve customers or solving specific, high-intensity problems (IFD framework). Hotels must shift focus from using AI for "cosmetic applications in marketing" to transforming the operational core.
- **Prioritize Buying Learning-Capable Systems:** Internal development efforts fail twice as often as external strategic partnerships. Instead of attempting complex internal builds that stall due to limited time and budget, hotels, especially small and mid-sized establishments, should prioritize partnering with trusted vendors who offer deeply customized, learning-capable systems. These successful systems integrate into existing workflows, retain context (memory), and improve over time based on feedback.
- **Leverage Frontline Knowledge and Trust:** The widespread use of consumer AI tools among employees ("shadow AI") demonstrates that individuals can successfully adopt AI when tools are flexible and responsive. Forward-thinking organizations source their most successful AI deployments from these frontline managers and "power users" who instinctively understand AI's utility and limitations. Intermediaries, such as DMOs and associations, must capitalize on the high demand for vendor-neutral guidance, best practices, and training programs to foster trust and accelerate adoption.
- **Design Experiments for Scaling:** Any pilot must be run to prove value with an eye toward future scaling. This requires demonstrating a clear connection to value creation, maintaining low cost, and ensuring there is a clear path for enterprise-wide implementation. Once value is proven, scaling up requires dedicated "Ninja Teams" with senior leadership support and resources to manage change and unexpected challenges.

The Imperative of Visionary Leadership: Crossing the AI Mindset Divide

The move from scattered AI pilots to structured adoption depends on strong, visionary leadership. The hotel survey shows that strategic clarity and leadership engagement are still limited. To avoid the “AI Experimentation Trap,” leaders need a mindset shift:

- **Adopt an “Alien Mindset”** – GenAI works with many possible answers, not one. Leaders must value usefulness over correctness, accept ambiguity, and judge results in context rather than by rigid KPIs.
 - **Anchor Experiments in Vision** – Instead of running pilots without focus, leaders must start with a clear business goal and link AI to transformation that creates real value for guests and staff.
 - **Ensure Accountability for Scaling** – AI adoption is as much an organizational design challenge as a technical one. Senior leaders must provide resources and support while empowering teams to adapt and scale successful initiatives.
- In short: AI in hospitality won’t succeed through tools alone—it requires leadership ready to embrace new ways of thinking, tie projects to strategic goals, and back scaling with accountability.



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➤ Annex 1: Questionnaire

Annex 1: The Questionnaire (1)

From Awareness to Action – AI Readiness in Hotels

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. The goal of our short survey is to dive deeper into concrete implementation practices and identify best-in-class use cases. This phase involves a more detailed qualitative component and aims to support the **development of practical roadmaps for AI adoption in hospitality** and eventually, a detailed and structured overview of available AI Tools.

The questionnaire should take only **2-3 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 Hagen Britz, a student on the Executive Programme in 'AI in Hospitality' at Cornell's SC Johnson College of Business.

Annex 1: The Questionnaire (2)

From Awareness to Action – AI Readiness in Hotels

Section 1: Strategic Orientation

1. Does your hotel have a digital strategy that explicitly includes AI or automation topics?

- ☐ Yes, a formal strategy document exists
- ☐ Partially – AI is mentioned in digitalization discussions
- ☐ No, but we are considering it
- ☐ No, we don't see it as relevant yet

2. How would you describe your current approach to AI in hospitality?

- ☐ Experimental – we test tools on a case-by-case basis
- ☐ Tactical – we implement where ROI seems clear
- ☐ Strategic – AI is integrated into long-term planning
- ☐ Reactive – we follow trends but lack clear direction
- ☒ Other Approach

If "Other approach", please specify:

Annex 1: The Questionnaire (3)

From Awareness to Action – AI Readiness in Hotels

Section 2: Implementation and Internal Capabilities

3. Which internal skills or knowledge are currently limiting broader AI use in your hotel?

- ☐ Lack of tech expertise
- ☐ Difficulty evaluating vendors
- ☐ Resistance from staff
- ☐ Uncertainty about data protection
- ☐ Limited budget or time
- ☒ Other

If "Other, specify please:

4. How confident are you in your hotel's ability to implement AI tools in terms of...

- ☐ Staff acceptance
- ☐ Integration with current systems
- ☐ Data quality
- ☐ Return on investment
- ☐ Guest experience

From Awareness to Action – AI Readiness in Hotels

Section 3: Support and Ecosystem Needs

5. What types of external support would accelerate your hotel's AI adoption?

- ☐ Shared best practices and benchmarks
- ☐ Subsidized training programs
- ☐ Vendor-neutral technology guides
- ☐ AI-readiness audits
- ☐ Sector-specific innovation labs
- ☐ None – we prefer to manage internally

6. Have you collaborated with associations, DMO, or tech providers to implement or pilot AI tools?

- ☐ Yes – currently involved in a project
- ☐ Yes – in the past
- ☐ No – but we would be interested
- ☐ No – and not relevant for us

Annex 1: The Questionnaire (5)

From Awareness to Action – AI Readiness in Hotels

Section 4: Future Outlook

7. Over the next 2 years, have you planned any concrete investments into predictive or generative AI?

- ☐ I do not know
- ☐ No
- ☐ Yes

8. Over the next 2 years, how important will AI be for your hotel's success?

- ☐ Essential
- ☐ Important but not critical
- ☐ Not very important
- ☐ Not at all important

9. If AI could solve one major operational challenge in your hotel, what would it be?

Enter your text here

Annex 1: The Questionnaire (6)

From Awareness to Action – AI Readiness in Hotels

Size of your hotel (nbe of rooms)

Country

- ☐ Austria ☐ Germany ☐ France ☐ Italy ☐ Switzerland

Would you be ready to participate in a short online interview (20'-30')?

- ☐ No ☐ Not, this time ☐ Yes

Would you like to receive the study report?

- ☐ No ☐ Not, this time ☐ Yes

Thanks for participating!

Please SAVE your answers