



RESEARCH SUMMARY · 2026

# Hotels at Two Speeds

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Digital transformation in Georgian family hotels — and what it actually does to guest experience and business competitiveness

A field study of 35 family-run properties across six tourism clusters of Georgia, combining an owner survey, structured guest interviews and in-depth owner interviews.

**35**

properties surveyed

**34**

in-depth owner interviews

**9**

sites with guest interviews

**6**

regional clusters

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## EXECUTIVE SUMMARY

# One business, two different tempos

Georgian family hotels are not simply behind on digital adoption — they are split. Everything a guest sees before arrival, from the listing and the messaging to reviews and payment, is close to fully worked. The systems that would make the resulting demand manageable are, in most properties, absent altogether. The mean Digital Adoption Index across 35 properties is 2.91 on a six-point scale, but that average hides a 3.54-point gap inside a single property.

The study also produced two results that cut against expectation. Regional location does **not** determine how digital a property is: differences between the six clusters could not be distinguished statistically. And guests rated every property they were interviewed at 5.00 out of 5.00 for overall satisfaction — including the least digital ones.

Read together: digital effort is aimed almost entirely at winning the booking, while the binding constraint is the owner's knowledge and time — not geography and, despite what owners report first, not cost either.

## HYPOTHESES

### H1 Partially supported

Higher adoption relates to owner-perceived revenue gain (Spearman rho = 0.33, p = .051). It could not be tested on the guest side, where scores sit at the scale maximum.

### H2 Not supported

Digital receptiveness does not differ significantly across tourism regions (Kruskal-Wallis H(5) = 4.84, p = .436, effect size = 0.00).

**2.91**

Digital Adoption Index

mean of ten tools, 1–6

**5.14**

OTA platform use

fast tempo

**1.60**

Channel manager use

slow tempo

**5.00**

Guest satisfaction

identical at 9 of 9 sites

## THREE THINGS THIS STUDY ADDS

### Two tempos inside one property.

The concept described an industry splitting into fast and slow firms. Here both tempos coexist in the same micro-business.

### The satisfied-guest trap.

When every guest rates every property at the maximum, satisfaction stops working as a management signal.

### The barrier paradox.

The closed scale points outward at external constraints; open conversation points inward at knowledge and time.

## WHY THIS STUDY

# What we did not know about family hotels

Almost everything we know about digital transformation in hospitality comes from large hotels in developed markets. In Georgia, however, a large share of visitors do not spend the night in a chain hotel — they stay in a family hotel, a guesthouse or a cottage. That segment remains the blind spot: classic digital maturity models do not extend to a five-room business, and sector-level statistics cannot see what an individual property actually does.

The study asks two central questions: how digital transformation affects guest experience and satisfaction, and how receptive the properties themselves are to digital tools. Supporting questions cover which tools are used and at what intensity, which barriers exist from the owner's perspective, whether receptiveness varies by region, and whether adoption relates to satisfaction.

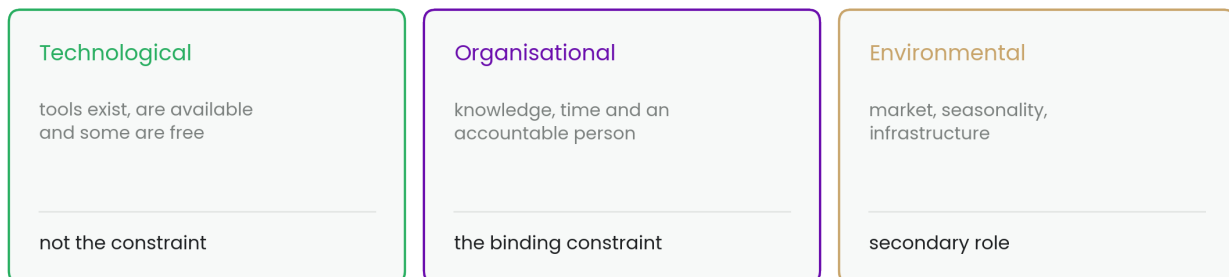
## RESEARCH HYPOTHESES

H1 — A higher level of digital adoption is positively associated with perceived guest satisfaction and intent to return.

H2 — Receptiveness to digital tools among family hotels differs significantly across the tourism regions of Georgia.

## THEORETICAL FRAME

The TOE frame applied to this dataset



The TOE model reads adoption as the product of three groups of factors: technological readiness, organisational capability and the external environment. The second frame — the "two speeds" of digital transition — warns that the process runs unevenly and penalises small operators in particular. This study puts both to work, but sharpens the second: the split between speeds does not run between firms, it runs inside a single property.

## SOURCE

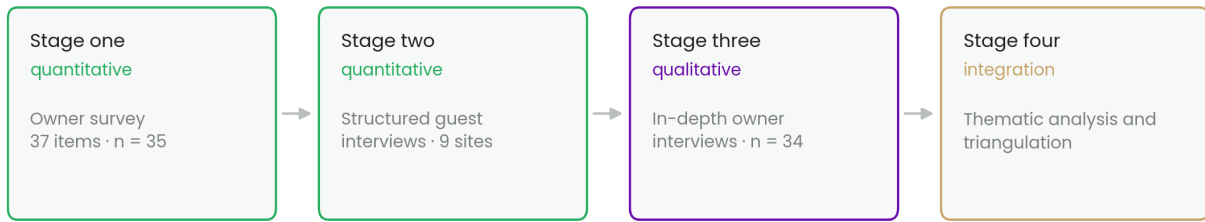
The research was conducted as a bachelor's thesis at the University of Georgia, School of Business and Administrative Sciences. This publication is the industry summary: every figure and every limitation is preserved, while the academic apparatus is abbreviated.

## HOW THE STUDY WAS DONE

# Three instruments, one dataset

The design is sequential explanatory: quantitative data first, to establish what is happening, then qualitative data to explain why. Fieldwork was carried out on site, property by property, across six tourism clusters. Every property was geocoded (EPSG:4326), so adoption could be examined spatially as well.

Sequential explanatory mixed-methods design



the quantitative stage answers "what", the qualitative stage answers "why"

### 01

#### Owner survey

n = 35

Four blocks, 37 closed items: property profile, digital adoption on a six-point scale, receptiveness and barriers.

### 02

#### Guest interviews

9 sites

22 structured items administered on site by the researcher: discoverability, booking, response speed, payment and satisfaction.

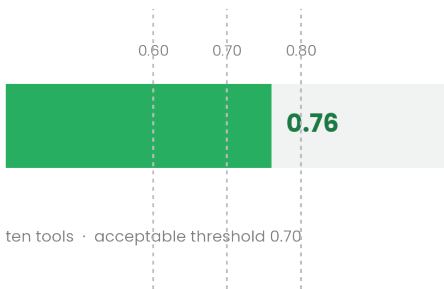
### 03

#### In-depth interviews

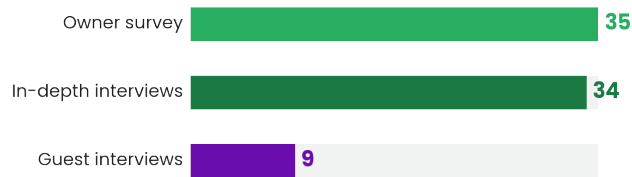
n = 34

Nine open questions with owners: attitude, barriers and platform dependence. Analysis is thematic.

Internal consistency — Cronbach alpha



Sample and instrument coverage



6 clusters · 6 regions · 12 localities · every property geocoded

## MEASUREMENT AND ANALYSIS

The index averages owner ratings of ten tools: OTA platforms, social media, digital payment, PMS, channel manager, own website, SEO, review monitoring, email marketing and paid digital advertising. Regional comparison used the Kruskal–Wallis test; associations used Spearman correlation.

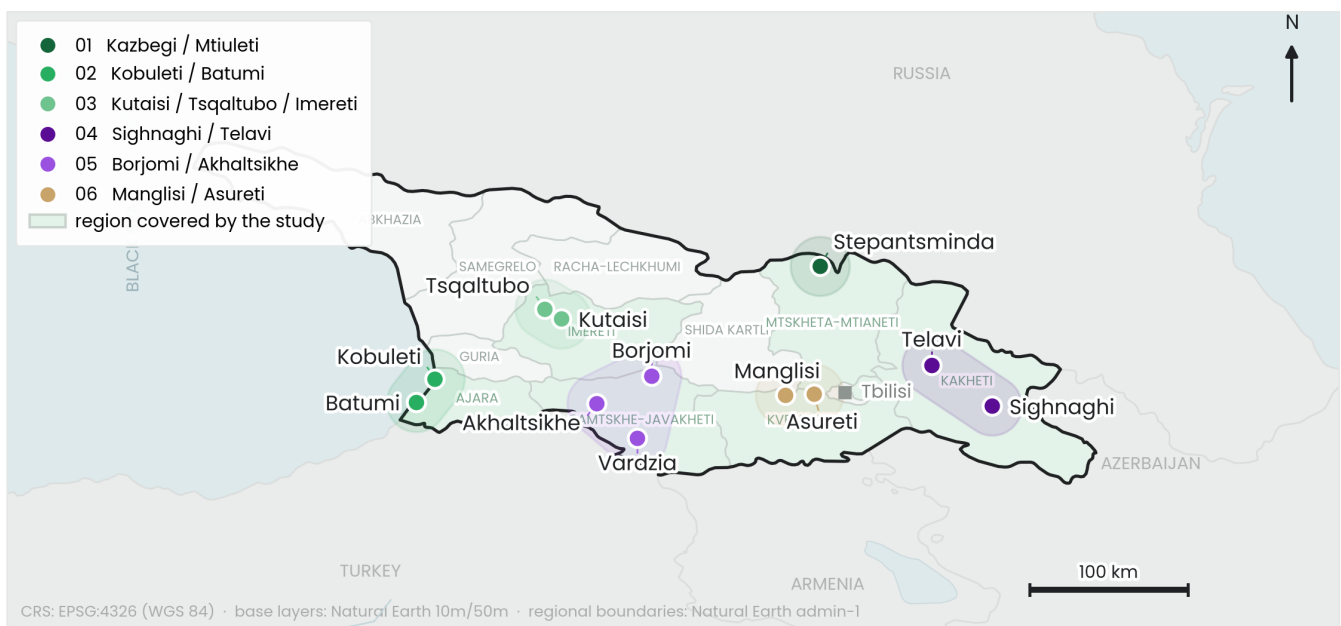
## WHAT THIS DESIGN CANNOT DO

The guest subsample is small and its scores sit at the scale maximum, so no guest-side association can be estimated. Data was collected at a single point in time: results speak to association, not cause. Adoption is owner-reported. Svaneti is outside the study area.

## SPATIAL COVERAGE

## Where the fieldwork took place

The study covers six clusters, twelve localities and six administrative regions: from mountainous Kazbegi to seaside Kobuleti, from the vineyards of Kakheti to Samtskhe–Javakheti. Coordinates were recorded during fieldwork and the data is stored as a geopackage in WGS 84.



## WHAT THE SPATIAL CUT SHOWED

Comparison across clusters returned no statistically significant difference and an effect size of zero. In practice this means a property's position on the map predicts nothing about how digital it is: two hotels on the same street can differ by more than three index points.

## WHAT THE DATASET WOULD ADD

This map shows fieldwork coverage. The same geopackage supports index-weighted spatial interpolation, a cluster heat map and a geographic breakdown by tool — those layers sit in the technical report.

01 Kazbegi /  
Mtiuleti

02 Kobuleti /  
Batumi

03 Kutaisi /  
Tsqaltubo

04 Sighnaghi /  
Telavi

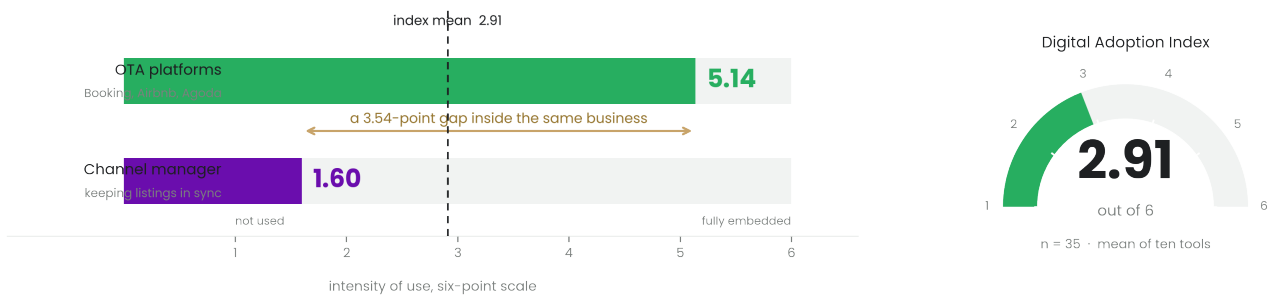
05 Borjomi /  
Akhaltsikhe

06 Manglisi /  
Asureti

## FINDING 01

# Fast and slow tempo in one property

Ranked by intensity of use, the ten tools do not form a gradient — they fall into two groups. Everything a prospective guest can see is worked hard; everything that would make the resulting demand manageable is almost untouched. Presence on OTA platforms averages 5.14 out of six — effectively full adoption. The channel manager, the very system that keeps those listings in sync, averages 1.60, which on this scale means owners do not use it at all.

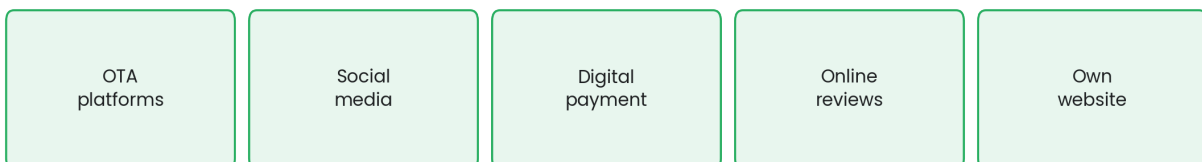


The operational consequence is specific, and every owner interviewed could describe it. A property listed on three or four platforms without a channel manager maintains three or four calendars by hand. Availability is updated after the fact rather than before, which produces either rooms deliberately held in reserve or occasional double bookings resolved with an apology. Neither appears in a satisfaction score, and both cap revenue.

## THE ARCHITECTURE OF ADOPTION

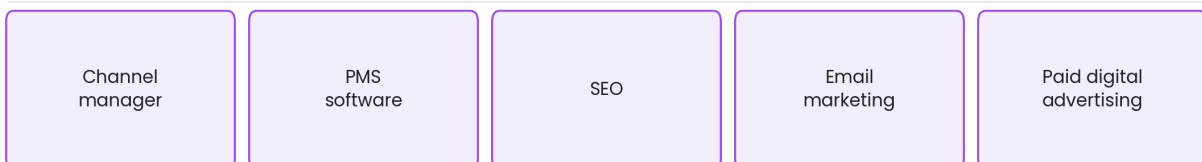
Guest-facing layer — worked hard

fast tempo



Operational layer — barely used

slow tempo



## WHY THIS MATTERS COMMERCIALY

Platform-only digitalisation transfers margin and control to the platform while leaving the manual work with the property. Commission is visible and everyone mentions it; the hidden cost — nights held back for safety, hours spent reconciling calendars, no rate control across channels — is neither measured nor discussed. Closing the gap between 5.14 and 1.60 is the highest-return intervention available to this segment, and it is a training question rather than a capital one.

## FINDING 02

# Geography explains nothing

The expectation going in was that a guesthouse in mountainous Kazbegi and a seaside property in Batumi would live in different digital worlds — different season, different guest, different connectivity. The data does not support it. All three principal statistical results are shown below in one view.



The spread is real, but it sits within clusters rather than between them. The differentiating factor is the owner: age and confidence with software, whether a younger family member handles the listings, whether anyone has time to maintain a system once installed.

For anyone designing support programmes this is the most actionable result in the study. Region-bound digital support — a scheme for one valley, a pilot for one resort town — will land on ready and unready owners in the same proportion everywhere. Segmenting by demonstrated capability rather than by map coordinates is both cheaper and more likely to work.

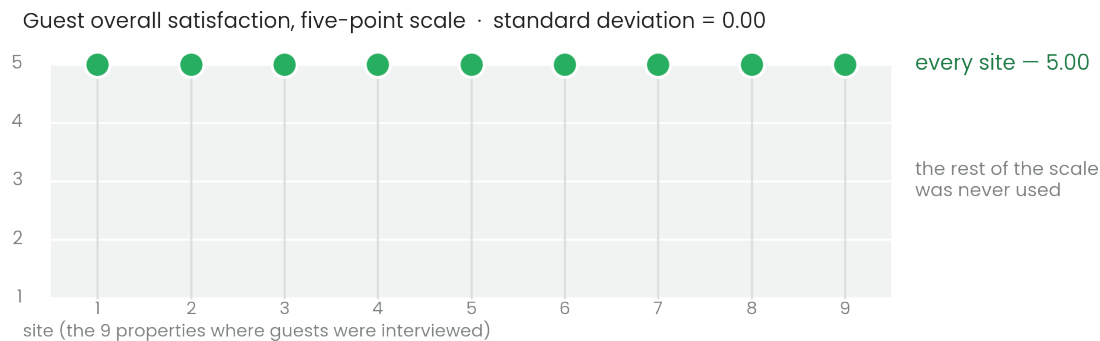
### IMPLICATION FOR POLICY

The target is the property's organisational profile, not its postal address. A spatial map of adoption is needed for description, but it does not work as an instrument for selecting where to intervene.

## FINDING 03

# The satisfied-guest trap

At all nine sites where guests were interviewed, mean overall satisfaction came out at 5.00 on a five-point scale. Not high — maximal, and identical even at properties whose adoption index sat close to the minimum. This is a ceiling effect, and it is a finding rather than a defect.

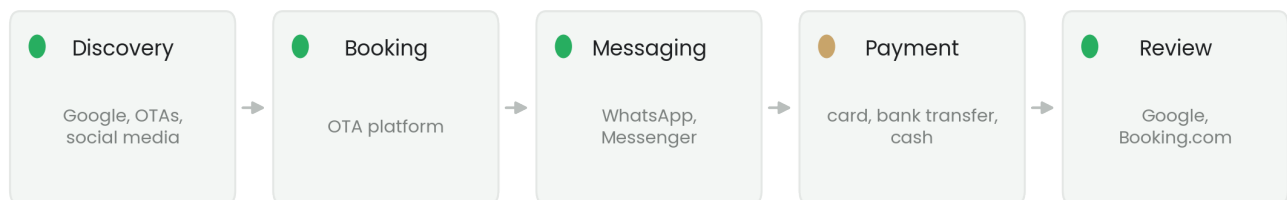


Three things produce it. Georgian family hospitality is genuinely warm, and warmth covers a general satisfaction question. A guest interviewed on the premises, in front of the host they shared a table with, will not say anything else. And the guest of a family hotel is not comparing against a chain hotel's app — they are comparing against the expectation they arrived with.

For the owner the result is a feedback vacuum. If every guest reports complete satisfaction, no signal ever arrives saying the booking flow is clumsy or the reply came ten hours late. HI therefore survives only on the owner side, where adoption relates to perceived revenue gain ( $\rho = 0.33$ ,  $p = .051$ ) — a relationship about perception, sitting right at the threshold of significance.

## WHERE THE GAP HIDES

The guest-facing journey — every touchpoint is covered



the gap is invisible along this path — it sits in the back office

## WHAT TO ASK INSTEAD

The practical conclusion follows directly: a general satisfaction rating is not a usable measure in this segment. What does work is two specific questions — how did booking go, and how quickly did you get a reply — asked after departure rather than at the table.

## FINDING 04

# What owners tick, and what owners say

The survey and the interviews asked the same question about obstacles and got different answers from the same people. On the closed scale, owners emphasised constraints located outside the business. In open conversation the picture moved inward: I do not know which tools exist or what they do; and there is no hour in the day not already spent on guests, breakfast, laundry or the building.

### What the closed scale says

Cost of systems

Platform commissions

Not enough demand

Connectivity and infrastructure

cause is located outside the business

open conversation →

### What the open interview says

I don't know what exists

Nobody ever showed me

I have no time

If it breaks, who fixes it?

cause is knowledge and time

Both answers are sincere. A closed item offers a socially comfortable explanation and the owner takes it; an open question invites the more exposed and more accurate one. The methodological lesson: a barriers battery used on its own will systematically over-report financial and infrastructural constraints in this segment – and a subsidy designed on that evidence will buy software nobody has been taught to run.

## THE SAME CONCLUSION IN THE LANGUAGE OF THE FRAME

The TOE frame applied to this dataset

### Technological

tools exist, are available  
and some are free

not the constraint

### Organisational

knowledge, time and an  
accountable person

the binding constraint

### Environmental

market, seasonality,  
infrastructure

secondary role

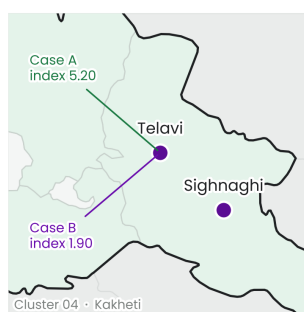
## CONCLUSION

The constraint is organisational, not technological and not environmental. The tools exist, are available and some are free; the environment is difficult but not impassable; the deficit is in knowledge, time and an accountable person. That is good news, because those three resources are comparatively cheap to create.

## CASE STUDY

# One region, two different businesses

The capability argument is made most clearly by a pair selected from one region on the principle of maximum variation. Case A scores 5.20 on the index; Case B scores 1.90. Same market, same season, comparable size and comparable rooms.



The difference fits in one sentence: in Case A a younger family member took the digital side on as their own job; in Case B the owner handles enquiries personally, by phone and messaging app, and every system beyond that has been considered and postponed.

Case B is not failing. It is full in season, and its guests gave it the same maximum score in the on-site interviews as everyone else did.

## COMPARISON ACROSS THE TWO CASES

| Dimension                | Case A — index 5.20   | Case B — index 1.90       |
|--------------------------|-----------------------|---------------------------|
| Listings on platforms    | three or more         | one or none               |
| Calendar synchronisation | channel manager       | by hand                   |
| Response speed           | hours, with templates | when the phone is checked |
| Responding to reviews    | regularly             | rarely                    |
| Accountable for digital  | one family member     | nobody specifically       |

### WHAT THIS MEANS FOR CASE B

This is exactly the problem this publication describes: nothing in the property's feedback environment tells the owner what the missing systems cost — so the postponement is renewed every year at no apparent price.

## WHAT FOLLOWS

# Where the leverage is

Recommendations are grouped by who can act and ordered by expected return. All of them follow from the same picture: the sector does not need more digital enthusiasm, it needs the slow tempo brought up to speed.

### For owners and managers

#### 01 Synchronise before you scale.

If a property is on more than two platforms, a channel manager or a single shared calendar returns more than another listing will. It turns rooms held in reserve into sellable inventory.

#### 02 Buy one system and name someone accountable.

The interviews show that adoption is followed by abandonment when nobody owns maintenance. One tool, one named person and one day of training beats three abandoned subscriptions.

#### 03 Do not trust the five-star score.

General satisfaction is at the ceiling and carries no information. Ask two specific questions instead — about booking and about response speed — after departure.

### For policy makers and DMOs

#### 01 Segment by capability, not by region.

Regional variation in adoption is statistically indistinguishable from zero. A programme bound to one destination will cover ready and unready properties in the same proportion, at higher administrative cost.

#### 02 Fund teaching and maintenance, not licences.

The declared barrier is price; the observed barrier is knowledge and time. Subsidising software without hands-on onboarding and a support line reproduces the same picture.

#### 03 Use the back office as the indicator.

OTA presence is near-universal and useless as a progress metric. Channel management, PMS and direct booking discriminate between properties, and they measure the operational capacity that actually constrains revenue.

### For platforms and vendors

#### 01 Price and package for a five-room business.

Per-room pricing, a Georgian-language interface and a first setup performed by a human being address the real adoption friction more directly than feature depth does.

#### 02 The first month is the product.

In this segment adoption is decided by whether the owner is still using the system four weeks later — not by whether they signed up.

## WHERE THE RESEARCH SHOULD GO NEXT

Four directions follow directly from the limits of this design. Svaneti, deliberately left outside the study area, is the most logical extension. A satisfaction instrument that avoids the ceiling would make the guest side of HI testable. A second wave on the same 35 properties would turn association into trajectory. And an audited measure, built on what listings and systems actually show, would remove the study's main measurement dependency.



## ABOUT

GtroT Research is the research practice of Globetrotters (GtroT Solutions). We work across several sectors and publish field research on questions where a practical decision needs data. This publication concerns hospitality; the research approach itself — sampling, fieldwork, statistical and spatial analysis — extends to other industries.

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## METHOD NOTE

Data collection: owner survey ( $n = 35$ ), in-depth owner interviews ( $n = 34$ ), structured guest interviews at 9 properties, across six regional clusters of Georgia. Digital Adoption Index: mean of ten tool-use ratings on a six-point scale, Cronbach alpha = 0.76. Regional comparison: Kruskal–Wallis,  $H(5) = 4.84$ ,  $p = .436$ , effect size = 0.00. Associations: Spearman correlation. Properties geocoded to EPSG:4326. Data was collected at a single point in time and adoption is owner-reported, so results describe association rather than cause. Guest satisfaction scores sit at the scale maximum. Svaneti is outside the study area.

## SUGGESTED CITATION

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