

HYB26

Annual Edition
















Converging Forces – The Future is
Hybrid by Design
























The Hotel Yearbook

Foresight and innovation in the global hotel industry



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Converging Forces – The Future is Hybrid by Design

Introduction

Henri Roelings

Founder, Hospitality Net



The hotel industry in 2026 stands at the intersection of powerful, converging forces. Technological acceleration, climate urgency, shifting guest expectations, labour market disruption, and economic realignment are no longer emerging trends. They are active dynamics reshaping hospitality in real time.

In this context, one thing has become clear: the most resilient and forward-thinking hotel organisations are those that embrace hybridity by design. By this I mean the intentional blending of digital and human, global and local, automation and empathy, standardisation and personalisation, growth and responsibility. The future will not reward those who choose one side over the other. It will reward those who are able to design integrated systems that hold these forces together in a coherent way.

What unites this year's contributions is a shared belief that the hybrid future is not a compromise. It is a creative reimagining of what hotels can be: platforms for connection, care, commerce, and culture, powered by both technology and humanity.

This year's Yearbook brings together a broad range of expert voices from all corners of the global hotel industry. Our contributors include senior executives, owners, asset managers, technologists, consultants, academics, and innovators. They write on strategy, technology, sustainability, finance, asset management, food and beverage, human resources, design and architecture, operations, and more. Each of them reflects on the central theme of intentional hybridity in an age of convergence, and each offers a lens through which you can look at your own organisation and ask: what might hybrid by design mean for us?

I am deeply grateful to all the authors who have shared their expertise and their time with us. Many of them are long-standing friends of *The HOTEL Yearbook*, others are new voices joining this conversation for the first time. Together they make this edition far richer than any single perspective ever could.

My sincere thanks also go to our publishing partners and supporters, whose collaboration makes it possible to bring this Yearbook to life each year. Their continued commitment to high-quality, forward-looking content is a clear signal that our industry values thoughtful reflection just as much as it values innovation.

A publication like this is, at its best, a catalyst. It is meant to inform, to provoke, and to support dialogue. I therefore invite you not only to read *The HOTEL Yearbook 2026* but to use it. Share articles with your teams as discussion starters, bring selected viewpoints into your boardroom and strategy sessions, and circulate the publication among industry friends and colleagues who may benefit from its insights. The more widely these ideas travel, the more value they can create for our community.

Across disciplines, geographies, and scales, one message emerges clearly from this edition: the future belongs to those who can fuse apparent contradictions into coherence. The hotels that will thrive are those that manage to be both high-tech and high-touch, both globally connected and locally rooted, both commercially successful and socially responsible.

In 2026, hybridity is no longer optional. It is strategic. And intentionality is what will set true leaders apart.

I hope that this Yearbook will inspire you to look at your own hybrid future with clarity, curiosity, and confidence.

Wishing you a reflective year-end and a successful year ahead,

Henri Roelings | Publisher



HY8



Closing the personalization gap: Why hotels still struggle to connect online promises with offline reality

Guest experience

Floor Bleeker

Board Member, Advisor, Investor and Consultant



Dubai-based Boutique
Strategic Communications Consultancy

Hotels have perfected AI powered personalization online, yet the experience often falls flat on property because guest insights stay trapped in fragmented systems and are not translated into simple, actionable cues for front line teams. Floor explains how unified data layers, predictive and agentic AI, and open standards like MCP could finally bridge this digital physical gap, as long as hotels pair the tech with training and a culture that turns insights into meaningful moments.

A guest books a hotel room on their phone. The loyalty app remembers their preferences based on loyalty data, prior bookings, and browsing behavior. It makes suggestions that feel intuitive and personalized: a high floor, a spa treatment, a late check-in. It even suggests suitable dining options and local activities. From time to time, it surprises them with an upgrade or a suggestion for a local experience they did not expect, but that makes sense, all based on transaction data, look-alikes and past browsing behavior. The experience feels seamless, intuitive, almost like the hotel knows them better than they know themselves.

Hotels have spent years perfecting this digital personalization, and GenAI amplified it. We have built sophisticated booking engines, smart pricing models, dynamic email campaigns, and loyalty apps that know our guests better than they know themselves. But somehow, when that same guest walks into the lobby, all that intelligence vanishes.

The online journey feels tailored and intuitive while the offline experience can often feel scripted and underwhelming. It is the great personalization paradox of our industry, and it persists not because we lack data or intent, but because we have failed to connect the two worlds. And this disconnect is not anecdotal. According to Deloitte, nearly 60 percent of travelers expect personalized experiences across the full journey, yet fewer than 25 percent feel hotels deliver consistently once they are on property.

WHY THE DISCONNECT EXISTS

The promise of personalization has always been to make every guest feel known, understood, and valued, yet there are only a few hotels that do this right, and they often rely on manual processes like looking at photos of VIPs during the morning briefing.

The reasons for this lack of automated personalization are structural as much as technological. Many hotel groups operate under franchise or management contracts: meaning, the brand controls the data but the property delivers the experience. Integrating data from CRS, Loyalty, CRM, PMS and personalization engines is complex, and front-line staff often lack the tools, training, or incentive to act on guest insights.

Even if a brand manages to integrate all its data seamlessly, it is not often turned into actionable information for front line staff. In addition, there are not many operational tools or apps available that can present this information in a way that is actionable for busy hotel operations.

Online personalization thrives because it is rule-based and structured: an algorithm matches preferences with offers.

In contrast, offline personalization depends on humans, and people rely on access, tools, training, and timing.

The front desk might know the guest's loyalty status but not their last three feedback scores. The restaurant might be aware of dietary preferences but not arrival times. Housekeeping may see "VIP" in the notes, but not why. Often, each department has its own slice of the truth, but no one sees the whole picture.

THE HUMAN FACTOR

Technology alone cannot fix this gap. People deliver hospitality, not code. The best CRM in the world means nothing if staff don't understand what to do with it or it is too complex to use in a demanding hotel environment.

In many hotels, personalization has been delegated to the marketing team. It is measured in open rates and conversion scores rather than emotional impact. But true personalization is a cultural discipline, not a marketing feature. It requires that everyone, from revenue managers to room attendants, share the same mindset and use data to *care* better, not just to sell better.

Training, empowerment, and recognition are essential. When employees are encouraged to act on insights and trusted to make small, spontaneous gestures, personalization becomes part of the brand's DNA.

A great stay rarely comes from perfect software. It comes from the moment someone says, "*Welcome back, we kept you on the quiet side of the building like last time.*"

I once worked with a brilliant marketer, who was obsessed with creating structured special moments for our guests. Together, we designed an algorithm to rank customers and assign them special moments once they stayed in one of our hotels. The on-property staff would get triggers via the CRM system showing them simple steps on what to do, what to say and when to do it to create those personalized moments. The prototypes worked very well but, due to technical limitations, it never scaled, and we eventually had to abandon the project.

WHY NEW TECHNOLOGY MIGHT FINALLY BRIDGE THE GAP

So why might it be different this time? How can emerging technology solve a problem we have been debating for decades?

It is because the next generation of systems are not just about collecting data: they are very good at connecting them, even if they live in different environments and may not be perfectly structured. Below are the four drivers:

1 UNIFIED DATA LAYERS AND THE "LIVING PROFILE"

New open-architecture PMS and CRM platforms are starting to build what we have long talked about: a single, real-time guest profile that moves across the entire journey. Instead of static preferences, these profiles behave like living organisms, constantly learning from interactions, purchases, and sentiment signals like reviews and surveys.

2 AI-DRIVEN CONTEXT AND PREDICTION

Artificial intelligence now enables systems to understand guest intent from subtle cues: not just what someone booked, but why they did. By analyzing tone in messages, stay frequency, or even similar guests, AI can predict what a guest might value next: a quiet table, a late checkout, or a personalized recommendation nearby.

3 AGENTIC AND EMBEDDED INTELLIGENCE

We are entering the era of agentic AI - autonomous systems that respond to input and act on behalf of both guests and staff. Imagine a digital concierge that can coordinate with the PMS, housekeeping, and the restaurant to anticipate a guest's request before they make it, or a staff co-pilot that quietly reminds an associate that a repeat guest prefers sparkling water over still.

4 SEAMLESS CONTEXT TRANSFER

The Model Context Protocol (MCP), a new open-standard initiative, will soon allow hospitality systems to share relevant guest context securely across platforms. In practice, this means a guest's preferences captured in a chatbot could guide how they are greeted on arrival, or what offers appear on their app.

FROM DATA TO MOMENTS

But let us be clear, data does not create loyalty, as my colleague always said, special moments do. Technology may make personalization possible, but people will make it memorable. We don't need more data or another app or widget, the question should be: How can we use what we know to surprise, reassure, or delight this guest right now?

Hospitality has always been about connection, the warmth of being recognized, the small details that say, "*We were expecting you*". For too long, technology has automated the transaction but ignored the emotion.

We are now at an inflection point. The convergence of unified data, AI, and open protocols gives us the tools to make personalization finally real; online and offline, digital and human.

If my colleague from way back is reading this; I hope you have not given up. You were ahead of your time. It is only now that we can make AI enabled personalization on property a reality at scale. Let us see who makes it happen first!



HYB



Can we please not say Hybrid, please

Beyond Hybrid

Matthias Huettebraeuer

Hospitality Strategist & Senior Executive Advisor



Hybrid is hospitality's buzzword du jour—but what if it's a dead end? Matthias Huettebraeuer, Hospitality Strategist & Senior Executive Advisor, argues that "hybrid" represents terminal thinking, not transformation. Instead of reassembling old boxes, he proposes three conditions for discovery: convergence, fluidity, and versatility. The key metric? Engagement—and redefining hospitality around how much of someone's life we hold space for.

Hybrid is the future. Everybody agrees, hence, it must be true. Or is it?

There are a few things about the future, like, for example, that we are not particularly good at predicting it. Also, there are different kinds of futures: for example, there are "could-futures" and there are "should-futures" (read Nick Foster's new book to learn all about it).

Could-futures are about being excited about and open to possibility, about results that you haven't expected; they follow the mantra of "just because you know where it started, doesn't mean you know where it ends."

And then there are should-futures: dogmatic often, data-driven, incremental mostly, it is Lego innovation; basically, take two things and stack them. Done. Often, those two boxes have gone through an elaborate process of optimizing, hyper-specializing, best-practicing, until they weren't flexible, weren't resilient, weren't interesting anymore. So, in some Frankenstein move, we glue boxes together, attach a new term and believe we have a new concept.

Welcome to hybrid.

Let's take a quick look at the best innovator, at the master of adaptability, continuous evolution, diversification: let's look at nature. Nature does hybrid too, some hybrids are pretty awesome: take the mule, a hybrid between horse and donkey - it has some cool features, like it can trot down the Grand Canyon like no other mammal can. But, like most hybrids, it is unable to reproduce; in business terms, the line is discontinued, hybrids mostly are terminals, not transitions.

Hybrids are mostly terminals, not transitions.

Sometimes, of course, hybrids play an important role in moving from one era to the next: think Toyota Prius and its major contribution to move us towards EVs before EVs were fully ready. Big achievement, hats off to the Prius, but carrying two propulsion systems meant it was always compromised. In the bigger scheme of things it is not the future, it is an interregnum.

Let's not build our future on interregna.

Instead, I want to encourage you to follow the path of a could-future. Instead of playing Lego, writing numbers fiction, pretending we know where it ends, we should focus on the three conditions that hold open design space, the framework for discovery, in which we will find our answers:

Convergence. Fluidity. Versatility.

Looking at convergence, Netflix is a great case. 25 years ago I was involved in a convergence project, merging TV and the internet, we knew where it started – two separate boxes – so we thought we knew how it would end – one box, the only question being which box. Again, we are not very good at predicting futures, because in an unexpected move, streaming turned out to be not two concepts coexisting, it dissolved the concepts altogether. Content became entirely device independent (networks, not spaces, to draw a real estate analogy). It disrupted the entire production and distribution landscape. It revolutionized viewing habits. And it created content forms that didn't exist before. Reimagination, not reassembling.

Fluidity is about how it moves. It is not about designing structures or image backgrounds, it is about designing flows, the experience of shifting functions, modes, moods, ceding a level of control to the user, but leading by precise but subtle direction, interventions. It is a bit like Jazz, not scripted like a symphony, yet every bit as intentional. Sounds abstract? Go visit Hans Meyer's Zoku and you see how it works - that it works. Spaces that flow seamlessly from touch down, to short stay, to long stay, from intimate to social hub, from productive to procrastinating, observing guests rather than predicting.

Versatility is probably what most people look for when they say hybrid, the Swiss Army knife dream, the super app fantasy, it's the gravitational pull we feel away from hyper-specialization's dead-end, and the instinct is right. Versatility isn't compromise or hedging bets, it is the designed-in capacity of excelling at multiple purposes. Growth, resilience, engagement all flow from versatility.

Yet, again, there is a fundamental difference between versatility and bolting together specialized parts – its openness to emergent function. You design for multiplicity and the world shows you possibilities you never imagined. Starbucks didn't set out to become the world's largest coworking space. Nobody predicted the role of SMS in making mobile phones great and changing the way our species interacts. Versatility creates the conditions for surprising success.

Convergence. Fluidity. Versatility.

If that is our road to success, how do we measure success?

In hospitality we have always looked at footprint and frequency. How many locations, units, outlets, how many visits, how many transactions, revenue per a fraction of our square meters, revenue by every square meter. That's terminal thinking, recording discrete countable events.

Designing for convergence, fluidity and versatility takes hospitality right into our current economic system: aiming at engagement and duration – how much of someone's day / week / life do we hold space for? Not "did they check in" but "are they in a relationship with this space, with our ecosystem across multiple contexts?"

How much of someone's life do we hold space for?

Engagement then, of course, is not just a metric, it's a fundamental reimagining of what hospitality is. Coming back to the Netflix analogy, Netflix doesn't want us to watch more movies. They want to be your default leisure state. Hospitality, designed for convergence, fluidity and versatility, wants to be your default provider of space, service and community.

So, if I may insist, can we please not say hybrid, please?

But when it comes to creating spaces that converge meaningfully, move fluidly, serve multiple purposes brilliantly, and create genuine engagement – let us do a lot more of that.



HY8



It's Time to Rewrite Hospitality's Story for the Next Generation

Future workforce

Christina Reti

Founder & CEO, CDR Global

CDR

Christina Reti, Founder and CEO of CDR Global, reflects on why hospitality keeps losing young talent to misconception rather than reality. She argues that hotels remain one of the rare industries where starting at the bottom can lead to global leadership, but only if the sector updates its message and its internal practices, with clearer growth routes, stronger coaching, and workplaces that feel modern, purposeful, and human.

I've spent my whole career in hospitality and travel, and I've never accepted the idea that young people "don't want to work in hotels." What I have seen, though, is that many don't want to work in industries that feel old-fashioned, hierarchical, or purpose-light. Unfortunately, that is still how hospitality is often described to them.

But the story they're hearing is not the one I've lived. And it's not the one the industry offers.

Currently, the Travel & Tourism sector is one of the most powerful job engines on the planet. It's growing faster than the broader economy, creating millions of new roles over the next decade, and serving as one of the most accessible gateways into global employment. At the same time, the talent pipeline is tightening everywhere: ageing populations, shifting values, rising skill requirements, and a generation that is questioning the meaning of work itself.

So, we face a choice. Either we allow hospitality to be defined by outdated ideas about servitude and sacrifice, or we intentionally rewrite its narrative as a place of upward mobility, human impact, and leadership development.

I think the next five years will determine which path we take.

I STARTED AT THE BOTTOM—LIKE ALMOST EVERYONE ELSE I KNOW.

In hospitality, the CEO who once washed dishes is not a myth. It's a cliché because it's so common. I've met general managers who began as bell attendants. Regional presidents who started serving tables. Senior executives who paid their way through school by housekeeping or night auditing.

It's one of the few industries where a young person can start anywhere, literally anywhere, and end up everywhere.

But that message is not reaching the people who need to hear it. Many young candidates arrive assuming hospitality is a temporary job, a stepping stone, a "meanwhile." They don't see it as a field where curiosity, grit, emotional intelligence, and resilience can launch a lifelong career.

I once asked a group of university students what they thought "entry-level" meant in our industry. The most common answer was: "low paid and no path out." My answer back was: "Or the first chapter of a global career."

The gap between those two visions is the space we need to fill.

WHY THE OLD STORY NO LONGER FITS—AND NEVER REALLY DID

For decades, hospitality has been framed as a sector you go *into* but eventually plan to *leave*. This sentiment made sense in an era characterised by rigid hierarchies, slow promotions, and manual processes that left little time for creativity or personal growth.

But that world is disappearing.

Technology is transforming the operational backbone of hotels. Automation is reducing repetitive tasks. Digital tools are simplifying workflows. Hybrid models are emerging. And the work that remains, the deeply human work, is becoming more valuable, not less.

A role that once seemed predictable now requires problem-solving, emotional intelligence, data fluency, improvisation, and real-time leadership.

The idea of hospitality as "servitude" collapses the moment you understand what frontline teams do today.

They run complex, high-speed micro-businesses. They negotiate, anticipate, prioritise, and adapt. They mediate conflict, stabilise crises, and deliver experience design on the fly. They navigate cultural nuance, guest psychology, and operational pressure, all while projecting warmth and calm.

Show me another sector that builds those muscles so fast.

THE NEXT GENERATION ISN'T REJECTING HOSPITALITY—THEY'RE REJECTING THE WRONG VERSION OF IT.

Young people today are not avoiding hard work. They're avoiding meaningless work. And they are incredibly clear-eyed about what they want:

- meaningful responsibility
- growth and mobility
- psychological safety
- visible pathways
- leaders who actually listen
- environments where they can be themselves
- and work that aligns with their values

Hospitality can offer all of this if we choose to tell that story honestly and architect it intentionally.

I've met 22-year-olds who are already supervising multicultural teams of twenty people. I've met young graduates who are responsible for revenue strategy, guest experience adaptation, or sustainability initiatives within their first year of employment. I've seen trainees become managers in under two years because they were curious, coachable, and engaged.

However, unless we connect these examples to a broader narrative about opportunity, the misconceptions will prevail.

WHY THE NEXT FIVE YEARS MATTER SO MUCH

Here's what I think is coming and why this moment is so important.

1 THE INDUSTRY IS TRANSFORMING FASTER THAN ITS TALENT NARRATIVE

Technology, sustainability, and shifting consumer expectations are all converging. Hotels are becoming experience platforms, wellness hubs, digital ecosystems, and amplifiers of local culture. None of this can happen without skilled, motivated talent. However, the story we're telling young people still sounds like it was from 1998.

2 LEADERSHIP ROLES ARE CHANGING—AND WIDENING

The next generation of leaders will need digital literacy, cultural intelligence, adaptability, creative thinking, and strategic judgement. These skills are often learned fastest in operational environments, not corporate boardrooms. Hospitality, without even trying, is a natural incubator for leadership. We need to claim that.

3 WORKFORCE SHORTAGES ARE NOT GOING AWAY

Many countries simply do not have a sufficient working-age population to meet the rising demand. That means talent competition will intensify. Industries that know how to attract, develop, and elevate young people will win. Those who rely on old reputations will lose.

Hospitality can't assume it will remain the default employer for entry-level talent. It needs to *earn* that position.

4 YOUNG WORKERS ARE RE-EVALUATING WHAT MATTERS

They care about:

- wellbeing
- personal development
- inclusive cultures
- flexibility (where it's possible)
- technology-enabled work
- and feeling valued, not used

These are not unreasonable desires; they are futureproofing mechanisms. The industry's ability to integrate them will determine who joins, who stays, and who grows.

SO: WHAT STORY SHOULD WE BE TELLING?

If I could reintroduce hospitality to the next generation, this is what I would say.

“THIS IS A PEOPLE INDUSTRY—AND PEOPLE INDUSTRIES SHAPE LIVES.”

We don't produce things. We create experiences that often become lifelong memories. That is impact. That is purpose. That is meaningful work.

“YOUR STARTING POINT HAS NOTHING TO DO WITH YOUR CEILING.”

The beauty of hospitality is that it doesn't care where you begin. What matters is your curiosity, emotional intelligence, consistency, and desire to learn. The runway is long and wide if you want it to be

“YOU WILL GAIN SKILLS HERE THAT THE FUTURE ECONOMY DESPERATELY NEEDS.”

Resilience, improvisation, empathy, conflict management, systems thinking, collaboration, and leadership under pressure; every industry will need more of these skills. Very few build it like hospitality does.

“YOU DON'T HAVE TO CHOOSE BETWEEN TECHNOLOGY AND HUMANITY.”

The future workforce in hotels will be a hybrid one. Digital tools will handle the repeatable tasks, allowing people to focus on the work that requires judgment, creativity, and emotional connection. It's a complementary system, not a competitive one.

AND INSIDE THE INDUSTRY, WE HAVE ANOTHER JOB TO DO

We can't just rewrite the story outwardly. We need to redesign the experience internally.

That means:

- clearer and faster career pathways
- better leadership development
- more intentional onboarding
- smarter scheduling
- cultures that prioritise wellbeing
- recognition that actually feels like recognition
- managers who are trained to coach, not command
- and workplaces where people feel welcomed, not worn down

Hospitality is inherently human. If people don't feel cared for internally, it's almost impossible for them to deliver care externally.

MY HOPE FOR THE YEARS AHEAD

If there is one thing I know, it is this: hospitality changes people. It builds them. It shapes their perspectives, confidence, global awareness, resilience, and emotional intelligence.

I've watched individuals transform through this industry. I've watched them arrive shy, uncertain, or unsure of their place—and leave with a sense of competence and possibility they didn't know they had.

We need to tell that story.

We need to show that story.

We need to live that story.

Because the next generation isn't looking for perfection, they're looking for purpose, possibility, and a place where they can grow.

Hospitality can be that place, if we rewrite the narrative, intentionally and boldly, and if we back our words with real action.

The industry needs talent. And talent needs an industry that sees them, supports them, develops them, and believes in what they're capable of.

For me, that is the hospitality story worth telling in 2026, and long after.



HY8



How Hotel GMs Must Evolve to Lead in the AI Era

Future GM

Jitendra Jain (JJ)

Hotelier, Tech Enthusiast and Founder, Hotelemarketer.com

Jitendra Jain (JJ), hotelier and founder of Hotelemarketer.com, says the real challenge of the AI era is not technology but culture – and that tomorrow's General Manager must evolve from "captain" to "Chief Orchestrator." He explains how GMs can bridge the gap between messy legacy systems and AI's promise by using small, practical "edge AI" wins, making psychological safety a key KPI, replacing rigid scripts with prompt playbooks, and using automation to free up time for more human, high touch guest moments.

While the industry obsesses over algorithms, I believe the real battle of the next decade is cultural. Tomorrow's standout General Manager won't be defined by their ability to code, but by their ability to conduct a hotel where legacy systems, anxious teams, and AI's promise finally play in sync.

If you scroll through LinkedIn today, you might believe we're already living in a futuristic hotel utopia of biometric check-ins, hyper-personalized journeys, and predictive revenue tools that never sleep.

But when I walk into the back office of most hotels, I see something else entirely.

I see legacy systems that barely speak to each other. I see data sitting in silos because connecting it costs too much. And most of all, I see teams who are tired, wary of the latest shiny initiative, and quietly anxious that the robots are coming for their jobs.

This is the **Digital Gap**. On one side is the exponential promise of AI. On the other, the gritty, human reality of hotel operations. If we're serious about bridging that gap, we need a new kind of leadership.

FROM CAPTAIN TO CONDUCTOR

For decades, the GM was the ship's captain. They knew every detail, pitched in during chaos, and held the operation together.

I think that role is evolving. In the AI era, the standout GM will be less a captain and more a conductor. Let's call them the **Chief Orchestrator**.

A Chief Orchestrator doesn't need to play every instrument. Their job is to make the sections work together - systems, people, processes - so the hotel delivers a consistent, human guest experience while quietly benefiting from intelligent tech in the background.

And the good news? This isn't some far-off 2030 fantasy. It's already starting now.

1 START WITH IMPERFECT INSTRUMENTS

Let's be honest. Most hotels don't have perfect tech stacks. And that's okay.

The biggest myth I see in our industry is that AI adoption needs everything to be integrated and cloud-native. If we wait for that, we'll miss years of opportunity.

I'm a big believer in "Edge AI". Not in the technical sense - but as a mindset: smart, local, high-impact tools that sit *on top of* the mess and still create value.

One real example: A front desk agent dealing with a guest whose anniversary stay didn't go to plan. Instead of spending 20 minutes drafting a careful apology email at the end of a long shift, the agent used a secure AI assistant to draft the message in 60 seconds. It wasn't generic. It reflected the context, the emotion, and the appropriate tone. The agent made a few tweaks. The supervisor reviewed it. The message went out that night.

This didn't require new infrastructure. The underlying systems didn't change. But the experience did. For the guest, and the employee.

The Orchestrator GM looks for these wins. They ask: *Where are we bleeding time or energy? What can we layer on now to make things better, not perfect?*

2 PSYCHOLOGICAL SAFETY IS A METRIC

The real barrier to AI in hotels isn't code. It's fear.

Everywhere I go, I see it. A reservations manager wondering if voice bots will take over. A marketer nervous about generative tools. A long-tenured concierge quietly thinking, "I've made it through OTAs and the rise of digital concierges... but this?"

When people are afraid, they retreat. They hoard knowledge. They stick rigidly to SOPs. And they quietly resist change.

That's why I think **psychological safety** will be the hidden KPI of AI transformation. A team that feels safe will learn, share, and experiment. A team that doesn't, won't.

If I were running a hotel today, I'd look at three simple signals:

- Are teams given time to try tools and share learnings?
- Are new ideas tested and celebrated, even when they flop?
- Can any associate say, "I tried this AI tool today" without fear of sounding silly or obsolete?

The Orchestrator GM doesn't need to teach neural networks. But they do need to shift the story - from automation to **augmentation**. From "this tool replaces you" to "this tool helps you reclaim time to do what humans do best."

Culture, not capability, is the first unlock.

3 FROM SOPS TO PROMPT PLAYBOOKS

We love SOPs in hospitality. I get it. They bring consistency. They reduce risk. They scale quality.

But they also assume a world that's predictable.

What happens when a guest asks for something unusual? Or when the situation doesn't fit the script?

In an AI-enabled hotel, I believe SOPs will still be there - as rails. But inside those rails, we'll empower staff to be more dynamic, using **prompt playbooks**.

Here's what I mean. Instead of memorizing five recovery responses, staff use an AI framework that helps them:

- Summarize what went wrong.
- Understand what the guest actually values.
- Suggest 2–3 response options that align with brand tone and policy.
- Draft the message in a way that feels personal, not robotic.

The result? Faster, more relevant, and still brand-safe.

The GM's role here is critical. They don't throw out the SOPs. They expand the toolbox - and encourage judgment, creativity, and contextual thinking.

That's a shift. But it's one I believe most teams are ready for, if we show them how.

4 THE HIGH-TOUCH PARADOX

Here's something I've come to believe: the more digital travel gets, the more valuable humanity becomes.

Booking, billing, even planning - increasingly handled by apps and AI. So where does the hotel stand out? In the moments that *can't* be outsourced.

A guest arrives from a 12-hour flight, grumpy and sore. A team member anticipates what they need and offers it without being asked. That's not data. That's care.

But here's the catch: you can't deliver that level of human presence if your team is buried in admin.

I expect to see more hotels using AI to handle the quiet admin grind - summarizing shift logs, flagging unresolved issues, and drafting responses to routine guest questions. Even modest deployments can win back hours every week for frontline teams.

The real leadership test is what happens next. The Orchestrator GM doesn't just absorb the time into leaner staffing models. They reinvest it into the lobby. More greeting. More eye contact. More proactive support for families who need a little extra care.

To me, this is the **High-Touch Paradox**: AI creates more capacity for human warmth - but only if we choose to use it that way.

WHAT GMS CAN ALREADY DO THIS YEAR

None of this requires a five-year roadmap. If I were a GM today, here's where I'd start:

1 IDENTIFY THREE PAIN POINTS TO AUGMENT.

What's eating your team's time? Long reports? Translation? Shift logs? Start with one. Add a safe, simple AI tool that solves *just that*.

2 CREATE AN AI SANDBOX.

Pick 2–3 tools. Let teams test them, share what works, what doesn't. Protect the experimenters. Celebrate the curious.

3 BUILD A MINI PROMPT LIBRARY.

Start with real-world cases: a late check-in complaint, a special occasion mishap, a group booking gone sideways. Create a few prompts that guide staff to handle it well, without rigid scripts. (If you'd like a ready-made set of prompts, I've put together "[100 Practical AI Prompts for Busy Hoteliers](#)" that you can adapt).

These are cultural moves, not technical ones. And they make a difference.

MY FINAL THOUGHTS

AI isn't a distant future for hotels. It's here. But its impact won't come from the tools alone.

It will come from how we lead.

The GM who helps their team feel confident - not scared. The GM who looks for small frictions to solve. The GM who creates space for creativity, not just compliance.

That's the **Chief Orchestrator**. And I think that role will define the next decade of hospitality leadership.

Not because it's flashy.

But because it's human.



HY8



SX = GX. Square!

Staff experience

Mark Fancourt

Co Founder & Principal Consultant, TRAVHOTECH



Mark Fancourt, Co Founder and Principal Consultant at TRAVHOTECH, argues that the guest experience can only be as strong as the staff experience behind it, and that 2026 must be the year the industry finally treats $SX = GX = \$$ as a real strategy, not a slogan. He calls out fragmented tech, context switching, and poor visibility as design failures that exhaust teams, and makes the case for tri-discipline leadership, integrated systems that give staff a 360° guest view, and tech that amplifies human service instead of replacing it.

WHY THE STAFF EXPERIENCE IS THE PLATFORM FOR CUSTOMER SUCCESS IN 2026

It doesn't take an Einstein to grasp the direct, fundamental relationship between the quality of the Staff Experience (SX) and the ultimate delivery of the Guest Experience (GX). The equation is simple, absolute, and long overdue for universal acceptance: $SX = GX$. Yet, for decades, this wisdom has been the industry's single greatest hypocrisy. While every leader echoes the sentiment, strategic action consistently dictates a painful, costly sacrifice of the SX.

As we prioritize the GX above all else—often through narrow, siloed technology investments—we systematically introduce chaos, inefficiency, and friction into our operations. This broken design philosophy impacts job roles, industry attractiveness, and ultimately, compromises the very guest experience we seek to elevate.

2026 must be the year we commit to a strategic course correction. The only way to win the ongoing talent war, ensure operational fit & ecosystem, and deliver differentiated service and revenue growth is to prove and maximize the equivalence: $SX = GX = \$$.

DESIGNING FOR FAILURE

The current operational landscape is plagued by two persistent design failures rooted in a lack of operational know how:

1 THE TECHNOLOGY TAX ON LABOR

Technology is often acquired to solve a narrow, guest-facing problem but is rarely integrated into the whole Technology Ecosystem strategy. This results in a heavy Fragmentation Tax on our teams:

- **Context Switching:** Staff must constantly jump between multiple, often non-integrated applications, leading to distraction, fatigue, and errors.
- **Manual Reconciliation:** Automated systems often fail to communicate with core platforms (PMS, POS, ERP), forcing employees to manually input data, negating any perceived automation gain and violating the principle of Integration vs. Interfacing.
- **The Service Erosion Paradox:** Staff are relegated to troubleshooting technical shortcomings and performing low-value administrative tasks, eroding their professionalism and diluting the very accountability and commitment they were hired to provide.

2 THE GREAT VISIBILITY DISCONNECT

We constantly strive for seamless alignment in the guest experience, yet we continue to structurally segregate the staff experience. This creates a contradiction where our most passionate employees are actively hindered by the technology and process environments we give them.

A travel agent often possesses visibility into all of their customer's plans across a trip. Does the typical hospitality professional have the same visibility and opportunity to monitor and improve a guest's experience across a property or stay? No. This lack of a 360-degree view stifles the fundamental professional satisfaction great hospitality employees gain from exceeding expectations. When data is siloed, the staff member's intent to serve is disconnected from their ability to act.

This dual problem—technological fragmentation coupled with a profound Visibility Disconnect—is the great accelerator of job dissatisfaction and industry turnover.

PRIORITIZING SX FOR COMPETITIVE ADVANTAGE

To reverse this trend, industry leaders must adopt a new design philosophy that views the SX not as a cost center, but as a critical lever for Competitive Advantage and revenue growth.

1 REQUIRE TRI-DISCIPLINE EXPERTISE AT THE TOP

Leaders directing strategy and investment must possess deep background and tri-discipline expertise—the rare simultaneous understanding that comes from a blend of:

- **Operational Know How:** Understanding the true day-to-day workflow and guest-facing reality of the hospitality product.
- **Technology Delivery:** Knowing the actual difficulty and technical requirements of implementation and integration.
- **Business Strategy:** Aligning technology deployment with a clear long-term vision and Strategic Asset Management principles.

This combined knowledge, experience, and perspective is non-negotiable for making informed, non-sacrificial investments.

2 DESIGN FOR AMPLIFICATION, NOT REPLACEMENT

The philosophy must shift from automation for cost savings to technology for human amplification.

- **Enable Visibility and Revenue Growth:** Invest in integrated platforms that provide the staff member with the necessary 360-degree guest visibility (e.g., enterprise CRM, integrated service management). This simple act of connecting data immediately amplifies the employee's ability to act on their professional impulse, enabling not just passive service but active engagement in value-added activities and revenue opportunities.

- **Empowerment through Tools:** The technology's job is to handle transactional elements and surface actionable insights (the "what") so the employee can focus on empathy and solutioning (the "how"). This immediately elevates the job role to one of high-touch service delivery and genuine connection, cultivating a "servant's heart" and improving talent retention.

3 ANCHOR SUCCESS IN INTERNAL ACCOUNTABILITY

Every technology project must carry Performance Management metrics tied directly to the Staff Experience.

- **Demand Alignment:** The implementation process must establish clear accountability and responsibility for the technology's adoption and performance at every level, ensuring true execution.
- **Discerning Application:** The strategic application of technology must be intrinsically aligned with the specific nature of the hospitality product. For high-touch service segments, the focus must remain on empowering teams; for transactional segments, a higher degree of automation may be appropriate.

The year 2026 presents an opportunity to course-correct a generation of flawed investment. By prioritizing the Staff Experience, we are not sacrificing the guest; we are finally putting in place the robust, cohesive, and human-centric infrastructure necessary for the realization of authentic, world-class hospitality and sustainable revenue growth.

Our's the future!



HY8



**Forget infinity pools.
Cultural capital is
luxury's real
advantage.**

Cultural capital

Youri Sawerschel

Founder & Chief Creative Officer, Creative Supply

Creative
Supply

Youri Sawerschel, Founder of Creative Supply, warns that luxury hotels are drifting into sameness and that infinity pools, marble lobbies, and "local experiences" are no longer enough to justify a premium. He argues that in an AI-fuelled copy-paste world, the real long-term advantage will come from building cultural capital – a clear cultural point of view, active cultural production, and carefully curated communities – so that luxury brands become genuine cultural forces, not just nice places to sleep.

A couple of weeks ago, I spoke with a group of young Saudis working in tourism development. I asked them about luxury hotel brands, which ones they liked and why. Their answer was straightforward: most luxury hotels "feel the same" and "aren't exciting anymore."

While innocent in nature, their response was actually putting the finger on a critical challenge increasingly facing luxury hotel brands: brand homogenisation.

Over the past twenty years or so, luxury hotels have perfected the luxury hotel brand playbook. On the product side, marble lobbies, celebrity chef Michelin restaurants and infinity pools are the norm. Luxury interior design has become a global affair; a lobby in Shenzhen can look almost the same as one in Chicago. On the service side, service quality has become standardised thanks to (or because of) quality frameworks like LQA. Brand stories all sound similar, promising to "reflect the essence of a destination through curated experiences, great design and personalised service." Soft brands have multiplied, all expecting their affiliated hotels to offer signature experiences that promise to "surprise and delight."

The formula has worked remarkably well. The luxury segment is still expanding, with brands such as Aman and Four Seasons announcing new resorts, yachts and even private jet itineraries. Yet with thousands of new luxury properties entering the market, the performance gap between top- and bottom-performing luxury brands has widened from 5 to nearly 7 percentage points over the past decade, according to CBRE.

Fast forward a decade, and the world will have thousands of new luxury hotels that offer facsimile experiences. Guests, more sophisticated and knowledgeable than today, will ask: why should I pay a premium to stay at this hotel compared to another? Or simply: is this hotel meaningful to me? Even a slight dip in demand would create an oversupply of hotels competing with the same set of tricks.

Brand homogenisation is both the result of hyper growth (opening dozens of hotels every year forces you to streamline), globalisation (taste and trends have become less local), and digital culture (copy-paste and remixing is native to social media, think TikTok trends). In the face of growing sameness, luxury hotel brands have got to evolve if they want to stay relevant. What got them here will not get them there.

THE EVOLUTION OF HOTEL VALUE

Thankfully, luxury hotel brands have always been gradually shifting their value proposition. In the early era of grand hotels, value resided primarily in real estate: location, architecture, sheer physical impressiveness.

The next wave emphasised operations: service excellence, consistency, anticipatory hospitality. This is where brands like Four Seasons built their reputation, not on having the grandest buildings, but on having the most polished service culture.

More recently, the industry has pivoted toward experiences, typically localised "authentic" activities. Hotels now compete on who can offer the most compelling cooking class, the most exclusive access to local artisans, the most Instagram-worthy sunrise excursion.

Each level built upon the previous. But "local experiences" themselves are becoming a cliché in the industry. When every luxury hotel promises a "curated journey into local culture," the phrase loses meaning. Luxury hotels have to elevate their brand and value proposition to a more symbolic level, with the intention to differentiate themselves in ways that cannot be easily replicated.

In a nutshell: luxury hotels have to build cultural capital, the ability to generate cultural meaning and shape taste, becoming a cultural force that influences not just where people stay, but how they think, behave, and connect both with each other and with themselves.

WHY CULTURAL CAPITAL MATTERS NOW

Cultural capital is valuable because it is hard to imitate. It elevates the role of a hotel far beyond its functional qualities. For luxury hotel brands, this means not only referencing culture but actually generating it.

This is particularly urgent in the age of AI. Generative tools now make it too easy to copy products, messages, and visual styles. A boutique brand's carefully crafted brand voice can be replicated in minutes. Its signature aesthetic can be reverse-engineered from Instagram. Service scripts, brand guidelines, and even architectural mood boards can be approximated by anyone. When technology flattens traditional branding elements, brands need other forms of advantage, forms that cannot be prompted into existence.

Growing cultural capital is a long game that requires time. But that is exactly why it creates a competitive advantage. Heritage, knowledge, taste, and manners cannot be replicated overnight. They cannot be replicated at all, if they are genuine.

THREE PILLARS OF CULTURAL CAPITAL

How can luxury hotels build cultural capital? At the heart, it comes down to three things: Cultural Point of View, Cultural Production, and Community Curation.

Owning a cultural point of view is the starting point. For luxury hotels, this means defining what they stand for, what they champion and what they reject. The key is to go beyond operational values (delight guests, anticipate needs) which will inevitably be generic, and focus instead on a broader role in the world.

Six Senses built cultural capital by defining wellness not as spa amenities but as a philosophical stance on how humans should live. Its programming, from sleep rituals to sustainability practices, positions the brand as a thought leader rather than a service provider.

An Asian luxury brand looking to strengthen its cultural point of view could evolve from a provider of "luxury Asian hospitality" into a cultural institution, the platform where Asia's emerging influence (economic, creative, technological) is debated and amplified. Rather than "offering warm Asian hospitality," it would champion Asia as a cultural producer, providing the spaces where the region's rising business, creative and intellectual class convenes to shape tomorrow. Articulating a point of view means taking a stand, which inevitably means not appealing to everyone.

Cultural production refers to taking an active role, rather than a passive one, in the creation, translation and support of cultural outputs. Practically speaking, it means converting your point of view into tangible actions. The Beaumont in London commissioned a habitable sculpture by Antony Gormley as part of the building itself. A design-led hotel with a strong architectural stance might commission an annual "Unbuilt Ideas" exhibition, inviting architects to present visionary projects that were never constructed. The hotel becomes the custodian of imagination rather than a passive consumer of design trends. The specifics matter less than the underlying principle: taking an active role in shaping the cultural conversation the brand claims to care about.

Community curation is the final pillar. Cultural capital is only useful if it is recognised. Social recognition, from people, media, and institutions, is essential to legitimate cultural capital. Community curation defines "who is in, and who is not." Community building is as much about shared interest as about discrimination.

Hermès understands this with its Horseshoe Stamp, the label reserved only for custom special orders. The little icon separates mere customers from friends of the brand. The logic applies to hotels. Imagine a luxury hotel brand offering only to its inner circle an exclusive island retreat, or access to a members-only cultural programme that money alone cannot buy. A community must be curated and entertained, far beyond loyalty programmes. Ever noticed that the most prestigious luxury brands in fashion, jewellery and automotive, from Hermès to Chanel to Ferrari, avoid traditional loyalty points entirely?

THE CASE FOR RISK

I can understand hotel brand executives being uneasy about such a strategy. Most luxury hotel brands are expected to deliver on a quarterly basis. Convincing a board to invest in a cultural foundation or an exclusive property running at 60% occupancy is an uphill battle. The value created by cultural capital does not show on a single line in a P&L statement. It is translated in the goodwill customers, employees and partners have toward your brand, the media coverage, the influencer attention, and the defensive moat you build around your business.

Building cultural capital comes with uncertainty and risk. Many companies would rather stick to being "a hotels and resorts brand for seasoned travellers." But in a world where AI can replicate your service scripts, your design language, and your brand voice in an afternoon, the only durable advantage is the one that cannot be copied: genuine cultural authority. The brands that build it now will define the next era of luxury hospitality. The rest will be left competing on thread count.



HYB



Beyond “No-Reply”: The Missing Link in Hybrid Hospitality

Hybrid hospitality

Benjamin Jost

Co-Founder and CEO, TrustYou

Ben Jost, Co Founder and CEO of TrustYou, explains that hybrid hospitality will only work when hotels fix the “conversation gap” created by no reply emails, siloed channels, and systems that do not share context. He describes how an AI powered “AI Operator” sitting on top of unified communication and guest data can turn every email, chat, and call into one continuous, informed dialogue, reducing staff workload and making the guest experience feel faster, more personal, and truly connected.

A few months ago, I booked a hotel for a short trip. The confirmation email arrived instantly from *no-reply@hotel.com*.

I had a simple question: could I bring my dog?

There was no way to reply to the email, no chat icon, or other quick way to ask. After a few minutes of searching, I found the phone number, waited on hold, and repeated my booking details to someone with no context.

Moments like this reveal an underlying problem in our industry: hospitality has always been about connection, yet our digital systems often get in the way. Guests reach out through dozens of channels, from booking engines to WhatsApp, while hotels communicate through automated systems that rarely align with each other. Staff are left to bridge the gap, repeating information that technology should already know.

If we want to design a truly hybrid future in which automation and empathy work together, we must first fix this conversation gap.

A FRAGMENTED CONVERSATION

Across the hotel industry, communication has become increasingly complex. On one side, hotels send guests automated messages, such as booking confirmations, marketing emails, upsell offers, and post-stay surveys, most of which come from “no-reply” addresses. On the other side, guests reach hotels through completely different channels, including phone calls, web forms, messaging apps, the extranet, and online travel agencies.

These two sides rarely connect. Each time a guest reaches out, the context is lost, and the conversation begins again from zero. A question asked on WhatsApp is not linked to the booking email that triggered it. A request sent through an OTA may never reach the team preparing the room.

The result is a fragmented experience that creates more work for staff, missed revenue opportunities, and frustration for guests. Front-office teams spend a significant amount of their time trying to connect information across systems that were never designed to work together. In an industry still facing staff shortages, this disconnect has become a structural problem.

I firmly believe that hotels need to rebuild communication around continuity, context, and choice to move forward, allowing guests to reach out on any channel and still be recognized as the same person on the same journey, and receive an instant reply, regardless of the time of day.

THE SHIFT TOWARD HYBRID BY DESIGN

The future of hospitality technology will depend less on adding new tools and more on bridging the gaps between the ones we already have.

Automation and human service must work as one system to create a truly hybrid model. That requires technology to understand context, remember conversations, and act across channels.

Artificial intelligence is now capable of providing that bridge.

For this to work, hotels require a solid knowledge foundation. This includes public knowledge about the property, such as reviews, ratings, and descriptions, combined with private knowledge about the guest, including stay history, preferences, and loyalty status. When these two knowledge layers connect, AI gains the context it needs to communicate effectively. This is what turns a simple question into a personalized and informed conversation.

In this model, AI becomes an invisible layer that links every guest interaction, whether it starts with a marketing email, a WhatsApp message, or a voice call. It can combine what the hotel already knows, such as its policies, amenities, and guest reviews, with private data, including booking details, preferences, and loyalty status.

When those two sources come together, communication becomes continuous and seamless. A guest can reply to a confirmation email to request late check-out, and the system can recognize the guest, reference their booking, and respond accurately. The conversation doesn't reset. It continues naturally, regardless of the channel or timing.

This is what *'hybrid by design'* means: technology that supports human service instead of hindering it.

WHAT HYBRID HOSPITALITY LOOKS LIKE IN PRACTICE

In the first stage, AI serves as a conversational bridge. It allows every email or chat message to form part of a single, ongoing dialogue between the guest and the hotel.

Over the next two years, this intelligence will begin to act on behalf of both guests and teams. Instead of only answering questions like *“Can I check in early?”*, it will log into cloud-based property management systems, check availability, and update bookings. It will also assign rooms, process payments, and manage simple operational tasks that require staff intervention today.

Voice capability will add the final piece. Guests will speak directly to the same system that already knows their history and preferences. Routine calls about arrival times, room changes, or upgrades will be handled instantly and accurately.

This evolution marks the arrival of what I call the *AI Operator*.

It is not just another chatbot or app, but a unified intelligence that can converse and take action. When applied correctly, it creates a consistent layer of support that runs quietly in the background, keeping every guest interaction connected and every team better informed.

THE IMPACT ON HOTELS, STAFF, AND GUESTS

A connected communication model benefits every part of the hotel experience. For hotels, it means fewer disconnected systems and faster response times. A single interface can manage all guest conversations, regardless of where they begin. Teams no longer have to jump between platforms or repeat the same information across channels, which reduces workload and improves efficiency.

For staff, automation brings relief. AI can handle repetitive questions that take up most of the day, such as check-in times or breakfast hours. When those tasks are automated, teams can focus on what truly defines hospitality: personal attention, empathy, and solving complex guest needs.

Guests benefit most. Every interaction feels consistent, immediate, and personal. They can communicate on their preferred channel, such as email, chat, or voice, and the hotel recognizes them instantly. A sense of continuity replaces the stop-start frustration that has become a common feature of digital travel experiences.

Over time, this creates a different kind of guest journey. Questions are resolved quickly, requests are understood in context, and information follows the guest rather than the other way around. The experience feels more human because the technology removes the friction that usually interrupts it. What the guest feels is not automation, but attention, and that sense of being remembered is what strengthens their relationship with the hotel.

LOOKING AHEAD

For decades, hotel service has been shaped by a simple sequence: a guest asks a question and the hotel provides an answer. It is a break-fix model that works, but rarely elevates the experience. With unified communication and AI, this pattern begins to shift. When systems understand context, they can anticipate questions before they arrive and support teams with information that would otherwise take minutes of searching. The industry moves from solving isolated problems to understanding the broader journey, which is where the real potential of hybrid hospitality begins.

By 2026, hotels with unified communication systems will already see the benefits. Guest satisfaction will rise as responses become faster and more accurate. Staff will spend less time managing systems and more time focusing on service. The relationship between hotel and guest will feel smoother and more natural because every message will form part of one continuous conversation.

The next step will be operational integration. As property management systems, booking platforms, and AI layers interact seamlessly, the hotel will begin to function as a connected network rather than a collection of tools.

The AI Operator will become a quiet but constant presence behind the scenes, coordinating actions that once required hours of manual work.

In the near future, the line between digital and human interaction will begin to disappear. Guests will no longer think in terms of “channels” or “systems.” They will simply experience service that feels immediate, informed, and personal.

DESIGNING THE NEXT ERA OF HOSPITALITY

Hybrid hospitality will define the next phase of our industry. It asks us to design technology that supports human service rather than competes with it. The successful hotels will treat every digital interaction as an opportunity to build trust and connection.

When I think about the future of hospitality, I don’t imagine more software or automation. I imagine fewer barriers between people and the experiences they want to create. The systems we build should do the hard work quietly so guests and teams can focus on what truly matters: care, connection, and genuine hospitality.

This is what it means to be *hybrid by design*: a deliberate combination of human and digital working together to bring hospitality back to its core purpose: making guests happy and being able to “always reply” to any message at any time.



HY8



The Future of Hospitality Is in a Fine-Tuned Blend of Humans and Technology

Human-less Service

Max Starkov

Hospitality & travel technologist and digital strategist



Max Starkov argues that guests are already comfortable with “human-less” service in accommodations, and hotels should respond by using AI, robotics, mobile, and cloud tools to do more with fewer staff while keeping a warm human face where it matters most. Using vacation rentals as proof that self-service works at scale, he links accelerated tech adoption to solving labor shortages and rising costs, and predicts a major staffing reduction by 2030 as automation moves from the back of house into core operations.

BACKGROUND

The classic philosophy in hospitality goes like this: customers - leisure, business, corporate group or SMERF members - require services provided by super nice, smiling, well-trained humans. Think the Ritz Carlton's employees and their little “Gold Standards” handbook that ensures above-and-beyond customer service. After all, this is the reason why our industry is called “hospitality”, because our guests supposedly expect their hosts - the hotel staff themselves - to provide “human” services at all touchpoints of the guest experience.

I believe the notion that guests are demanding human-provided services is greatly exaggerated, especially today. A great example of why guests do not care about human-provided services as much as some in our industry think comes from the vacation rental sector.

WHAT CAN HOTELS LEARN FROM VACATION RENTALS?

In 2025, close to a quarter of roomnights in North America were consumed at vacation rentals/ short-term rentals: houses, villas, condos and apartments. A quarter! The vast majority of these short-term rental bookings were done online via Airbnb, Booking Holdings, Expedia, Vrbo, Vacasa, etc.

Just imagine the whole vacation rental experience: you book online, receive online confirmation and pre-arrival information (directions, keyless entry info, destination info, etc.); upon arrival enter the unit using the mobile key or keyless entry; enjoy your stay; pack your bags and leave on day of departure. All of this while having a completely HUMANLESS EXPERIENCE! All of the “behind the curtains” human involvement remains hidden from the actual guests: vacation rental management, IT and technology management, RM and distribution, marketing, housekeeping, utilities maintenance, etc.

The “gold standard” at short-term rentals is customer experience WITHOUT any human contact between guests and hosts, and yet guests are not only not complaining, but gobbling up this “human-less” service and loving it! Since the pandemic I have spent over 200 roomnights at short-term rentals without seeing any of my hosts in person even once!

This means that a quarter of travelers who consume accommodations have already experienced human-less hospitality and are prepared to do so at traditional accommodation types such as hotels, resorts, casinos, motels, etc.

WHY IS THE SUBJECT OF HUMAN-PROVIDED SERVICES IN HOSPITALITY SO IMPORTANT?

There are three extremely important issues plaguing the industry today that need immediate resolution: a) never-ending labor shortages, b) unsustainable labor costs and c) inability to provide adequate services to the exceedingly tech-savvy and DIY (do-it-yourself) customers.

According to the Bureau of Labor Statistics, in August 2025 the number of unfilled positions in the U.S. were 7.2 million open positions, “only” 1.1 million of which were in leisure and hospitality, which means that labor shortages are not a hospitality-native problem. We cannot simply “bribe” with higher wages and sign-up bonuses people to come and work in hospitality, since professional services, trades, retail, transportation, utilities, manufacturing, construction, education, health and other industries that pay much higher average wages are equally affected.

The increased cost of labor in hospitality due to labor shortages is not to be taken lightly. Total labor costs per available room (LPAR) in North America in 2024 was \$72.44, an increase of 11.2% from 2023. Similar is the situation in Europe and APAC. Higher labor costs led to significant decreases in all key profitability metrics, including gross operating profit (GOP).

Many of today's travelers' service expectations are around self-service, around do-it-yourself, from online planning and booking, to preferences for contactless check-in, mobile keys, voice assistants and communications with hotel staff via messaging. It is time for our industry to give the DIY-obsessed customers what they want! Accelerated Investments in technology are needed to “appease” these exceedingly tech-savvy guests and their exceedingly high technology expectations.

In my view, *only through accelerated investments in technology* - cloud, mobility, AI, robotics, IoT and other next gen technology applications and innovations - can the hospitality industry solve the three major industry issues outlined above.

THE FUTURE: DO MORE WITH LESS PERSONNEL

The ultimate goal imposed on hospitality by the marketplace is simple: do more with fewer employees by using technology and reduce the property's staffing needs by a significant percentage.

Example: You can reduce your front desk staff by 50% or more by introducing mobile check-in and mobile keys, self-check in kiosks, chatbot on the website to handle service and information requests, email reservation assistant app to handle email requests, an issue resolution applications and voice assistants in the rooms to handle customer service for stay-in guests. All of this at a fraction of the payroll expenses.

Additionally, you can cut your housekeeping needs by half if you introduce housekeeping-on-demand as one of the steps during the mobile check-in or when checking in via the self-service kiosk in the lobby.

The arriving guest should be able to choose in advance the type of housekeeping they are comfortable with during their stay: daily, once every 3 days, weekly, etc. or no housekeeping, just leave fresh towels by the door. This allows better planning, scheduling and utilization of your housekeeping staff and results in significant reduction in labor costs.

Off business hours: An AI-powered chatbot like Umni, Quicktext, Asjkuite with realtime availability, rates and inventory (ARI) interface can not only answer all questions and provide information to convince would be guests, but also handle immediate bookings at 2am, over the weekends and 24/7. A voice AI agent like Sesame can handle the same via the property phone.

The list goes on and on. Technologies that exist today can significantly reduce staffing needs and labor costs in all stages of service delivery, from pre-arrival customer engagements to on-property guest services and post-stay customer retention.

A few years back, Hilton CEO Chris Nassetta summarized nicely the direction the industry is moving toward: *“The work we’re doing right now in every one of our brands is about making them higher-margin businesses and creating more labor efficiencies, particularly in the areas of housekeeping, food and beverage, and other areas. Our brands will be higher margin and require less labor than they did pre-Covid.”*

IS HOSPITALITY READY FOR HUMAN-LESS SERVICES?

The digital transformation, driven by AI and technologies, is changing both customers and hospitality at an unprecedented rate and hoteliers are caught largely unprepared. What is stopping hospitality from adopting technologies like AI, mobility, robotics, IoT, cloud, etc. to rebuild the new hotel tech stack?

I believe at this time there are three main impediments to the accelerated adoption of next gen technologies in our industry: a) reluctance to invest in new technologies by the real-estate minded owners and operators, a mentality that has turned hospitality into one of the most technology-averse industries today, b) lack of understanding and fear of new technology: “Who will deal with it? I don’t have trained staff to deal with it. It makes operations very complex”, etc., and c) The labor unions in major metropolitan areas with highly-unionized hospitality labor force are dead set against any robotization and automation or any technology advancement that can reduce the number of paying members.

In my view, none of the above can stop the rapid adoption of AI, robotics and automation technologies in our industry, in the same manner as the Luddite movement in early 19th century England could not stop the Industrial Revolution.

CASE STUDY: THE ROBOTS ARE ALREADY HERE!

Amazon already has 1.5 million robots in its warehouses, plus 1.5 million human employees. The company is preparing to automate 75% of its operations by 2030, replacing around an additional 600,000 U.S. jobs in the process.

In hospitality, global brands like Hilton and Marriott have integrated robots in their service operations with companies like Pudu Robotics, deploying over 53,000 robots worldwide for hotels and restaurants.

Keenon Robotics has deployed globally over 100,000 commercial robots for restaurants and hotels.

Pudu Robotics has deployed over 100,000 robots worldwide, in its three product lines: service delivery robots, commercial cleaning robots, and industrial delivery robots.

Bear Robotics expects to deploy 10,000 of its restaurant robots in the U.S. by the end of 2025.

Tailos has deployed over 1,000 Rosie hotel housekeeping robots in 12 countries.

Miso Robotics and their Flippy 2 fry station robot has been deployed at hundreds of fast-food restaurants like White Castle.

The list goes on and on.

A legitimate question: How can hotels be able to afford robots? **Robots-as-a-Service (RaaS)** is a flexible and affordable way for companies to deploy robotics and get everything they need from specialized robotics companies, including hardware, engineering, remote monitoring and maintenance in one package.

HOW TO FINE-TUNE THE BLEND OF HUMANS AND TECHNOLOGY?

Unless your property’s business model is a fully self-service hotel like the Otonomus Hotel in Las Vegas or Omena Hotel in Helsinki, I believe full-service hotels, especially 3,4,5-star hotels, should still maintain a “human guest-facing facade” but automate all of the “behind the curtains” operations using AI, mobility, cloud, robots and cobots, IoT and other technologies. Naturally, enable smart guest communications and personalize every touch point with the customer. And sure, add well-trained, well-motivated and well-paid humans with a warm smile into the mix.

Now, the question is: what percentage of human employees in hospitality will be replaced by technology (AI, robotization and automation) by 2030?

Technologies like AI, robotics, automation, mobility and IoT are called upon to solve a number of issues in hospitality:

- Solve dull, repetitive, dirty or dangerous jobs.
- Solve high turnover of trained employees (30%!)
- Solve problems like poor discipline, lack of motivation, etc.
- Lower labor costs, which consume 1/3 of room revenue
- Increase productivity
- Solve persistent labor shortages plaguing the industry.

Who will be affected the most? Call centers and reservation departments, front desk receptionists, wait staff, kitchen staff and housekeepers where I see teams of 1 human+5 robots.

Technology will not be replacing anytime soon highly qualified hospitality jobs like highly skilled and educated hotel managers, revenue managers, digital marketers, AI specialists, technologists and IT managers, CRM experts, sales managers, etc., but all of these professions will have to become proficient in the use of AI tools and maximize AI implementations in their areas of expertise.

WHAT DOES THE FUTURE HOLD FOR HOSPITALITY?

Hospitality can no longer ignore technologies like Agentic AI and personal AI Agents able to plan and book travel, AI-powered chatbots and voice AI like Sesame AI able to handle 24/7 hour online reservations, customer service and guest communications. Or robots and cobots - collaborative robots working in teams with human employees.

In my view, by 2030, thanks to AI, robotization and automation, hoteliers will operate, on average, with human staffs at least 50% lower than the staffing levels of 2019. This percentage will differ between hotel categories: 75% and more for budget, economy, extended stay and lower mid scale properties and 25%- 35% for 5-star luxury hotels and resorts.



HY8



The Growth Code: Why Human Investment is the Ultimate Advantage in an AI Era

Hybrid hospitality

Tanja Stegmüller
Co-Founder, TRUSTmenti

As hotels race to automate, Tanja Stegmüller, co-founder of TRUSTmenti, makes the case that resilience will come from intentional hybridity: blending digital efficiency with human wisdom, global standards with local soul, and automation with empathy. She lays out a ten point playbook for building hybrid leaders, learning ecosystems, and people centred cultures, arguing that technology can handle tasks, but only humans can deliver judgment, emotion, and the moments that define great hospitality.

In this shiny new era of buzzwords and bots, the most resilient hotels won't be the ones boasting about their latest AI widget or blockchain booking gimmick. No, the winners will be the ones that master hybridity by design: the art of mixing digital with human, global with local, automation with empathy, standardization with personalization, growth with responsibility.

Hospitality is already in a love affair with AI. Algorithms predict demand, robots carry towels, and chatbots have mastered the art of answering "What time is breakfast?" in seventeen languages. Impressive, yes. But here's the plot twist: the more automated we become, the more desperately we need people who can think, care, and lead.

1 PEOPLE, NOT PLATFORMS

Let's get real: AI can teach anyone how to check in a guest or upsell a suite. But when the system crashes on a sold-out night, or when the bride's cake collapses and she bursts into tears, no algorithm saves you.

What does? Human experience. Wisdom. And wisdom comes from human transfer of experience - the scars, stories, and survival tricks that no app can download. The tricks that saves your reputation.

AI can scale knowledge. I've seen it. But humans scale wisdom. And wisdom is what keeps hospitality human.

2 GLOBAL SYSTEMS, LOCAL SOUL

I've worked in hotels where brand standards came straight from HQ, wrapped up like gospel - same beds, same apps, same coffee beans.

But if you apply Zurich logic to a property in Zanzibar, you're in for a surprise. Culture, context, nuance - they don't come from manuals. They come from people who've been there, done that, and show others how to adapt without losing the brand promise.

That balance of global consistency and local authenticity? That's hybridity in action. Global promise, local delivery.

Without hybridity, "standardization" turns into "sterilization." And no guest checks into a hotel for a sterile experience.

3 AUTOMATION HANDLES TASKS. HUMANS HANDLE EMOTIONS.

I'll admit it - I love how AI tidies up data chaos, organizes housekeeping schedules, and spits out revenue forecasts before I've even finished my espresso. Efficiency.

But here's the catch: AI won't notice the guest standing in the lobby with that "help me" look, or the colleague quietly running on fumes. Only humans pick up on those signals - and only humans can respond with empathy.

4 PERSONALIZATION WITH A PULSE

AI is brilliant at suggesting what a guest "probably" wants. If a guest booked a spa treatment on their last stay, it will dutifully nudge them toward another massage. Helpful? Sure. Inspired? Not really.

But when that same guest arrives this time juggling two restless kids, no amount of algorithmic "recommendations" will land. A human with experience knows the best "offer" isn't the spa at all - it's getting those kids an early dinner and a corner table where the parents can breathe.

That's the blend: standardization keeps us efficient, but human judgment keeps us personal.

5 GROWTH WITH RESPONSIBILITY

Employee turnover has haunted almost every property I've worked in.

What changes the game is when employees feel invested in. When someone further along the path takes the time to guide them, they see a future. They stick. And they don't just become better staff, they become the culture itself.

Hybrid organizations know retention is not a perk. It's survival. And that, to me, is growth with responsibility.

6 REVERSE LEARNING: HUMILITY REQUIRED

Now here's where it gets interesting. Reverse learning is when the intern explains TikTok to the CEO, or a Gen Z teaches the executive suite why sustainability is not just a marketing campaign.

It's uncomfortable, yes. But it's also the smartest way to stay relevant. Hybridity is not just blending tech and touch - it's blending generations.

I am not saying the intern should take over the entire organisation - no, but it's a fact that with today's technology the environment gets faster and faster and the moment leadership stops learning, the business stops evolving.

7 BUILDING HYBRID LEADERS

Future leaders won't just manage people, they'll manage bots, dashboards, and cultures in flux. They'll need to read an AI forecast while also reading the room.

'Guidance' is the crash course in becoming AI-literate but human-savvy. AI gives the data. Human experience teaches you what it actually means when a guest, a team, or a P&L is on the line.

8 FORGET "PROGRAMS", THINK ECOSYSTEMS

The old leadership development program - HR pairing random people once a year and calling it "growth" - is dead. Hybrid organizations are building ecosystems where learning flows everywhere: top-down, bottom-up, sideways, across continents.

Yes, AI can help match people by career goals or leadership style. But the essence is human: conversations that spark growth. Think less bureaucracy, more wisdom on tap.

9 HUMAN GUIDANCE AS A CULTURAL BRAND

Hospitality loves to say it's a "people business." But ask any line employee grinding through split shifts if they feel like the business really sees them.

A culture of growth flips the script. It shows that development and belonging matter. And guess what? The younger workforce cares about this more than a staff meal voucher. Companies that make growth and knowledge transfer part of their identity will win the war for talent. The rest will keep wondering why their job ads get ghosted.

10 ROI WITHOUT THE SPREADSHEETS

There's no need for a spreadsheet to prove the point. The ROI is obvious: do you want a property full of clock-watchers who can't wait to leave, or a crew that feels invested, capable, and ready to step in when things go sideways?

That's not "soft". That's the bottom line.

CONCLUSION

Cash or card. Coffee or tea. Fork and knife. Hospitality doesn't thrive on either/or - it thrives on both/and. The same is true for AI. We need automation and empathy, standardization and personalization, global systems and local soul.

If there's one lesson I've learned, it's this: technology may keep the lights on, but people keep the spirit alive. The properties that will win are the ones that design for hybridity on purpose and not as an afterthought, but as a strategy.

So here's the playbook, let AI handle the repetitive tasks, but never outsource judgment. Standardize what works globally, but let local teams add their flavor. Build leaders who are data-literate, but human-savvy. And above all, invest in people - because they are the ultimate differentiator no machine can replicate.

In the end, that's the growth code. Hotels that master this balance will not just survive the AI era - they'll define it.

Hybrid is not the future. Hybrid is the present. And the smartest thing we can do is design for it.



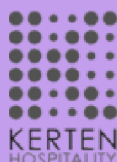
HYB



Intentional Hybridity: Designing with Passion

Hybrid hospitality

Marloes Knippenberg
CEO, Kerten Hospitality



Drawing on Kerten Hospitality's methodology and case studies, Marloes Knippenberg shows how purpose led frameworks, deep local engagement, and embedded ESG can create scalable projects that stay authentic, coherent, and adaptive as guest expectations and societal demands evolve.

Everywhere I look, forces are colliding: digital vs. human, global vs. local, standardization vs. personalization, revenue vs. responsibility. By default, collision leads to friction, but only if we cling to the purity of one side over the other. I see far greater opportunity in intentionally fusing these forces, transforming tension into generative energy.

At Kerten Hospitality, we have been weaving together polarities since our foundation. Intentional hybridity is one of our guiding principles. What follows are reflections on what I've learned and how we put hybridity into practice in an age defined by convergence.

WHY INTENTIONAL HYBRIDITY MATTERS

Convergence is everywhere. Guests expect an automated check-in alongside a warm human welcome. Dining venues must meet global culinary standards with local ingredients. Local communities demand inclusion and benefits from global developers. Social responsibility sits alongside revenue imperatives. These contradictions don't disappear. They intensify.

I think that pure models which are completely tech-led, completely branded, or completely standardized will increasingly struggle to resonate with consumers. And equally, purely boutique, purely artisan or wholly local concepts without systems will battle to survive and scale.

If we allow hybrid models to evolve randomly, we incur dissonance. Experiences feel fragmented, brands lose coherence, communities feel alienated, and staff become confused. Instead, we should cultivate hybridity by design, meaning that from day one we build in the polarities of the spectrum rather than choosing one and hoping the other falls into place.

HYBRID METHODOLOGY IN THE KERTEN LENS

So, how does intentional hybridity play out in practice? Over many years of launching hotels, residences, F&B brands, and mixed-use projects, we've refined a methodology that embeds hybridity into major decisions. Complexity is the medium in which we operate. Here's how we do that.

PURPOSE FIRST, ALWAYS

We start every project by asking: why should this hotel, brand or destination exist? Understanding the "why" before the "how", we set out to find the hallmark of each project, asking ourselves how we can make a difference. Whether it is empowering entrepreneurs, driving sustainability, or creating immersive cultural experiences, the reason must go beyond profit and become the compass for all other trade-offs.

LOCAL ENGAGEMENT VERSUS GLOBAL BENCHMARKS

We send our research teams into a location and involve all key stakeholders: owners, investors, developers, architects, suppliers, local government entities, and people from the local community. We deep-dive into questions such as: what are your wishes for this development? How can we add value? What does the local community need?

At the same time, we bring in global standards around management, guest service, sustainability and technology while aligning with overarching government and country visions and regulations. This ensures that while the experience is locally rooted, it also meets the benchmarks that owners, investors, and international guests expect. We engage deeply, invite pushback, and reconcile conflicts. That's how we marry global vision with local pulse. It's also how we detect friction zones early.

FRAMEWORK VERSUS CURATION

Rather than a rigid formula of processes and procedures, we use a hybrid structure: a framework of guidelines on top of which we curate bespoke features for each project. This is a complex process because every destination we build and concept we launch is deeply rooted in a human-centric purpose to support the local community and serve as a catalyst for a new ecosystem. We have spent years meticulously building the framework, so it strikes a balance between guidelines on the one hand and the disruption which inherently comes with curation on the other hand.

This framework is reinforced by a "Story Document," a living blueprint which outlines the concept vision, guest experience and operational approach and serves as a reference for aligning all teams and stakeholders throughout the entire project. It helps keep coherence as we scale, while letting each project shine with its unique personality.

REVENUE VERSUS RESPONSIBILITY

For us at Kerten Hospitality, revenue growth and social responsibility are not opposing forces. They advance together. ESG principles and revenue performance are integrated within our business model to ensure long-term value creation. Through UBBU (United Building a Better Universe), our ESG framework, we embed social responsibility into operations and governance, moving beyond compliance to deliver measurable impact on all fronts.

We are a UN PRI signatory, the world's leading advocate for responsible investment, and when we launch projects, we integrate carbon reduction, local sourcing, and social impact into the DNA rather than bolting them on later. Guests notice when sustainability is an afterthought versus when it is the backbone.

Unlike traditional hotel groups, we don't replicate templates; we build purpose-driven spaces that deliver strong returns and long-term value. Because of our hybrid methodology, we can launch hotels, residences, workspaces and F&B brands without losing coherence, and enable rapid, scalable execution without sacrificing the bespoke element.

HYBRIDITY IN PRACTICE

Nothing illustrates intentional hybrid design more clearly than ***Dar Tantara The House Hotel*** in AlUla, Saudi Arabia. Rather than building a new boutique hotel, the hotel was shaped entirely by the destination's history and cultural fabric. The hotel was born from centuries-old mud-brick houses, restored with great care to preserve authenticity, while simultaneously installing discreet modern comforts. The design language draws from local materials, earthy tones, organic forms, but upgraded with operational systems, digital management, and quality protocols. Guests are invited into experiences that go beyond a typical stay: candlelit pathways, traditional rituals, and sensory storytelling, transforming the hotel into a cultural gateway where the brand's identity is inseparable from its setting.

The property is a microcosm of hybridity: rooted in locality, but global in standards; ancient but modern; immersive but efficient; environmentally responsible but revenue driven. It demonstrates that hybrid design isn't a compromise. It's convergence with intent.

The same concept can be applied to other hospitality projects including F&B. An example is ***Nakhati***, a purpose-driven gelato brand, designed to empower women entrepreneurs and foster sustainable business ownership across borders. Nakhati is as a social movement, blending sustainability, cultural craftsmanship, and scalable business potential. Each Nakhati location adapts flavors to local ingredients, infuses cultural motifs, sources locally, and co-creates with local artisans. At the same time, a global franchise framework ensures consistency, efficiency, training, and quality. Nakhati is a powerful demonstration of how social responsibility and business success can go hand in hand to drive meaningful impact.

FUSING FUTURE CONTRADICTIONS INTO COHERENCE

From where I stand, here's how hybridity is likely to evolve in the near future.

Travel and living will converge further. We will increasingly design lifestyle destinations where residents, locals, and visitors coexist fluidly in mixed-use ecosystems, integrating serviced residences, collaborative workspaces, F&B, retail, and entertainment into one seamless experience of hybrid living.

Buildings, interiors, and services will be designed for adaptation. Modular design will mean that walls, rooms, tech modules etc. can be reconfigured over time to meet new operational needs. Communal spaces can evolve in response to changing cultural and guest expectations, keeping the destination relevant and engaging. Partnerships with local creators, artists, and entrepreneurs will bring a dynamic layer of renewal with rotating experiences that continuously refresh the sense of place.

Sustainability, social goals, community benefits and impact metrics will cease to be optional. They will become design constraints, enforced by regulation. Future developments will be evaluated not just for yield, but for social impact, local sourcing, and heritage preservation. Every roof, water system, procurement process, and staff structure will embed ESG principles as core architecture, not afterthoughts.

Finally, I expect governance models to become more hybrid, combining centralized oversight with local stakeholder advisory councils, citizen input and adaptive boards. The tension between control and autonomy will be built in by design. We will see new business models emerge in the form of social franchises, co-ownership, participative ventures with locals, and impact partnerships that align investors with community-driven operators. Blending capital and community will become the new normal, as investors increasingly seek purpose that is aligned with profit.

Where does this lead? To a future where hospitality isn't rigid, where places are not simply hotels or residences, guests aren't simply consumers, and culture isn't décor, but where all these layers intersect intentionally and meaningfully.

We are in the age of convergence where complexity is no longer a challenge to be solved but a medium to be shaped. With a multitude of convergences in hospitality, the question is how we choreograph it. Intentional hybridity offers the blueprint: a way to design with tension, not against it, and to create destinations that are as adaptive and alive as the people they serve.



HYB



Bringing it All Together: How All- Inclusive Resorts Changed the Narrative

Hybrid hospitality

Ricardo Orozco Arce
Vice President Operations, The Villa Group



As all inclusive resorts shed their old value only reputation and reemerge as serious players in the upscale leisure space, Ricardo Orozco Arce of The Villa Group shows how the category's revival is powered by "hybrid by design" thinking. He maps the unlikely pairings redefining the model luxury and explains how blending these forces can broaden appeal, deepen loyalty and keep the guest experience feeling effortless and worth it at every step.

There's no question that a "hybrid by design" approach is key to a strong future for the hospitality industry. Need a proof point? Look no further than the resurgence of the all-inclusive category.

Since their inception, all-inclusive resorts have been a favorite of travelers seeking to maximize their vacation dollar; yet for decades, these properties often have been unfairly maligned by those who stubbornly insist that value and luxury are mutually exclusive.

That perception has shifted in recent years, as all-inclusives have adapted (and invested) to refine their offerings and redefine the model. They've achieved this monumental shift largely by embracing the notion that bringing seemingly contradictory elements together can attract new audiences while still delivering for longtime loyalists.

Here are a few of the unlikely "pairings" that have driven, and will continue to drive, that success—and thoughts on how your property can use them, too.

LUXURY + VALUE

Over two decades in the industry, I've seen a gradual evolution in the all-inclusive space: a growing number of travelers are seeking elevated experiences, and they're more than willing to spend on them, as long as they feel the splurge is worth it.

Worth it.

That's the definition of "value" we need to reinforce, because it's focused as much on the experience as on the cost. If you want to reach the magic Luxury + Value combination, you absolutely need to make "worth it" your mantra.

So how do you get there? Offerings and amenities such as high-end dining, unique adventures, and upscale wellness experiences can go a long way—for travelers who aren't familiar with all-inclusives, they can feel almost like bonuses versus traditional luxury properties where everything is a la carte. (Speaking of which, more of those resorts are beginning to add more inclusive offerings as well, which only reinforces the shifting perception.)

Providing variety matters as well—after all, having a wealth of choices is a luxury all its own. I've seen resorts create food halls with multiple dining concepts in one place, making it convenient to try different cuisines and enjoy different experiences. This approach is particularly attractive for families and groups, allowing them to spend time together even as individuals indulge their own tastes and desires.

But remember, what you *don't* do is important, too: For instance, providing a robust menu of activities without charging additional fees means your guests will truly feel that they're getting value. It also means they likely won't bat an eye at a few premium experiences that do carry an upcharge—and they might even spring for one.

INDULGENCE + WELLNESS

Many of today's travelers don't treat vacations as a "free pass" any longer—even if they reward themselves with a lazy afternoon by the pool and an indulgent dinner, the next day might be focused on restoring balance with a workout in the fitness center, a hike on a nearby trail, or a treatment at the spa.

In order to attract these audiences, resorts can and should promote the dual nature of their offerings. "Go ahead, savor that decadent dinner and sumptuous dessert—along with a seasonal hand-crafted cocktail for a nightcap. Your custom "Revel + Replenish" itinerary includes a host of wellbeing opportunities that allow you to live it up while honoring your healthy lifestyle."

It's important to blend these into a narrative. Sure, you've got a fitness center, spa, and wellness programming; most top properties do. But you need to craft stories around those offerings—one example might be a spa experience centered around Mexican traditions, utilizing local ingredients such as agave and showcasing ancient healing methods.

CONVENIENCE + CULTURE

Authentic cultural experiences are driving destination choices for an increasing number of guests—particularly international travelers—but even the ones who likely will remain on-property for the bulk of their stay often want local flair and flavor.

Discovering different cultures is a big reason why people travel, after all—and it's why we must be unafraid when guests wish to explore away from the resort (although naturally, we don't want them to spend too much time away). Build up a roster of trusted vendors such as tour providers, perhaps even creating guides full of local knowledge. Your guests will return, and they'll be appreciative of your willingness to share.

Better yet, entice them to stay on property as much as possible with culturally rewarding experiences of your own. Think evening shows with local performers, or perhaps a weekly in-house artisan marketplace with opportunities to sample homegrown foods and purchase handmade goods. Ensure your guests can easily forge a connection with the greater destination without venturing away from the resort. That builds loyalty as well.

TECHNOLOGY + TOUCH

Resorts must walk a fine line when using technology. Too little, and guests can feel like it's a hassle to make reservations, plan activities, and so on. Too much, however, might make guests feel that you're trying to actively avoid interacting with them.

Modern yet non-intrusive innovations such as mobile keys and special bracelets that allow you to open your room complement the resort experience, versus dominating it. A custom smartphone app is in the same vein—guests will find it useful to have an easy tool where they reserve activities and meals, learn about the property, and get other information. It also can reduce the reliance on your staff.

Another welcome use of technology—assuming that you don't bombard guests—is utilizing data from mobile devices and other sources to deliver more personalized experiences. A guest who books a spa treatment or round of golf might get an email or text the next day with a special offer for a return visit before their stay ends. That data could trigger a phone call from a staffer instead, the perfect marriage of tech and touch. Either way, it's anticipatory. It feels personal. It's almost always appreciated, even if it ultimately doesn't result in a sale.

One word of warning: Whatever technology you use, don't forget about (or skimp on) data security. You don't want your guests' most memorable experience at your resort to be the hack that exposed their personal information.

TRAVEL + RESPONSIBILITY

As we all know, sustainable travel has been a trend for many years now—resorts that *don't* promote things like recycling efforts and responsible water usage are the outliers these days. Energy-efficient and environmentally friendly practices are the expectation, which means they're not really differentiators any longer, but they're still important to travelers.

Also popular, but providing perhaps a greater opportunity to stand out, are community-focused initiatives. I've seen resorts that offer scholarships to the children of their employees, donate to a rotating selection of local causes, and participate in events such as park and beach cleanups. Some even provide paid time off for volunteering.

This is good for the community, certainly, but it's also good for your property. People like to give their business to companies and organizations that treat their people well—and those that are a true part of the community. Employees like working for those companies as well, which makes it easier to attract and retain top talent. In turn, guests benefit from those engaged, invested employees. It's a cycle that benefits everyone.

THE POWER OF 'HYBRID' THINKING

This powerful hybrid approach isn't only about the future, at least for all-inclusive resorts. It's what enabled them to reach the new heights they're enjoying today.

Of course, guests might not ever think about the reasoning behind our choices, the thought that goes into every aspect of what we do. What's important is that they *feel* it at every step, before they arrive, during their stay, even following their departure.

After all, when a master vintner skillfully creates a red blend, most tasters don't pick out the individual components—they simply savor the overall experience. Properties that can deliver a similar feeling for their guests are positioned to thrive for years to come.



HY8



Why Presence is the Next Amenity

Human touch

Susie Arnett

Director of Wellness Programming, Six Senses



Susie Arnett of Six Senses explains that as hotel service becomes more automated, the real value of hospitality moves back to the human relationship between guest and host. Drawing on lessons from retreat centres, she shows why future staff must act more like guides than service workers, and why training should focus on presence and emotional intelligence so guests feel truly seen, not just served.

“Great hotels have always been social ideas,” wrote Joan Didion.

I love that line, because it reminds us that hospitality has never been just about buildings, it's about belonging. The best hotels don't simply house us; they mirror our social hopes, our longing to connect. And today, that longing is evolving once again



We studied 2500 guest comments across 30 hotels worldwide. Only 4% mentioned the physical product. What people really talk about is how the team made them feel.

Recent research by Jannes Sorenson, Founder of Kepler International Hospitality Academy

Before working in hotels, I spent years designing programs at retreat centers – places built for transformation and where the experience lives or dies by the quality of the people leading it. In those environments, the “product” isn't the facility (which usually includes very scratchy sheets, cinderblock walls, and bad food) – it's the *facilitator*. Guests are called participants, because they are participating in a meaningful experience.

On the other side of the encounter isn't a staff member, it's a guide. That language shift matters. When a retreat works, it's because the experience is guided by continual moments of connection that feel intentional, authentic, and alive. And that's when transformation happens.

What retreat centers taught me is that transformation doesn't depend on luxury, it depends on presence. Hotels are now rediscovering that same truth. Whether in a tropical wellness resort or a city hotel, what guests remember isn't the linens but the feeling of being cared for. As hospitality becomes more experiential, the quality of that experience depends on the quality of the person delivering it.

Guests no longer come only for rest or service; they come for connection, transformation, and meaning. (And they pay more for it). That changes everything about the relationship between guest and staff. The staff member who once delivered efficiency is now being asked to deliver experience.

THE RISE OF THE EXPERIENTIAL GUEST

Today's traveler is more self-aware, more curious, and more emotionally literate than ever before. They're not just booking a room, they're curating moments that align with their identity. They want to feel part of something unique, intentional, and human.

As a result, the nature of the guest experience is shifting from something the brand designs to something the guest co-creates.

This is something we've done in retreat centers for decades, built on the roots of the ashram experience where seekers go to awaken. This changes the host's role profoundly. The host is no longer there simply to execute service transactions but to guide, interpret, and personalize meaning.

Guest > Participant > Seeker & Staff > Host > Guide

This isn't limited to luxury. Whether it's a yoga teacher at a wellness resort, a bartender at a boutique property, or a front-desk associate at a lifestyle brand, the new expectation is the same: bring authenticity, emotional intelligence, and a sense of story to every encounter.

THE HOST AS GUIDE

At Six Senses, we see this evolution every day. From the beginning, we have called our staff hosts because their role has always been driven by what former CEO, Neil Jacobs, called “emotional hospitality”. A skilled host doesn't just provide information, they connect.

Travel is an experience driven by aspirational dreams: to escape, to become someone else, to recover, to celebrate. A host taps into these unconscious emotional drivers, sensing when a guest needs quiet rather than conversation. A chef tells the story of where a dish came from, creating a link between nourishment and place. A spa therapist helps guests access a deeper sense of self through ritual and presence.

In each of these cases, the host becomes more than a service provider. They become a guide, a translator of experience and navigator of dreams and desires, often guiding a person deeper into his or her own self. And this is where the peak moment occurs. In experiential hospitality, guests don't just consume experiences for Instagram; they are transformed by them. And that transformation happens in relationship with a human being who knows how to hold space. Because it's transformational, it's also highly memorable, locking the experience into long-term memory through qualities like strong emotions, heightened attention and deep processing. This bonds people to your brand. The property becomes a part of them.

As automation expands – check-in kiosks, mobile keys, AI concierges – the transactional jobs for hotel staff are disappearing. What remains, and what will increasingly define a brand's value, is the human capacity for empathy, intuition, and presence. That is the essence of the new host. In that moment of presence, when one human being truly sees another, the guest doesn't just feel served. They feel seen. And that is the essence of hospitality.

HOW THE INDUSTRY MUST EVOLVE

This shift demands new forms of training for staff, because presence can't be faked or standardized. It has to be developed. The hosts of the future will need more than customer-service or skills-based training; they'll need self-awareness, empathy, and maturity training.

That's why I believe hospitality training must evolve into personal development. It's not about teaching scripts, it's about cultivating emotional intelligence and self-regulation. The future host must know how to be grounded in themselves to create calm, trust, and transformation in others.

Harvard psychologist David McClelland's research on "training for economic achievement" in the 1960s offers a useful model. McClelland discovered that the most effective training doesn't focus on behaviors or rote skills, it helped people see themselves differently. By strengthening self-understanding and purpose, participants became more resilient, self-directed, and motivated. In other words, their identity changed, and their performance followed.

The hospitality industry can take a lesson from that. Rather than teaching people what to do in every guest interaction, we can nurture who they are becoming as hosts. When training touches that deeper level and develops character as much as competence, it produces the kind of emotional maturity that can't be replicated by technology.

At Six Senses, our hosts' wellbeing is developed through practices like mindfulness, reflective listening, and peer learning because when people are supported to be more fully human, they naturally become better guides for others.

THE FUTURE OF THE GUEST-HOST RELATIONSHIP

What does all this mean for your hotel or teams? The guest experience of the future won't be pre-fabricated, our staff aren't actors, after all. It will unfold through the interaction between guest and host – the spontaneous, human, in-the-moment magic that can't be automated or replicated where host presence is felt and responsive to the moment.

As AI takes care of logistics, the art of hospitality will return to its most ancient form: one human being welcoming another. And the greatest luxury of all will be to feel, even for a moment, that someone is truly there with you.

That's why presence isn't just a soft skill – it's the next great amenity.



HY8



Turning Technology Adoption Challenges into Revenue Engines

Tech adoption

Prince Thampi

Founder & CEO, Hudini



Prince Thampi of Hudini argues that most hotel tech projects fall short not because the tools are weak, but because adoption is treated like an IT rollout instead of a guest and staff journey. He outlines three common blockers and offers a clear playbook to turn digital investment into real operational and revenue gains.

Nearly every hotel and resort today is undergoing some form of digital transformation, implementing apps, web tools, IPTV systems, digital keys, or installing check-in kiosks in an effort to create more seamless and personalized guest experiences. Despite good intentions and heavy investment, many solutions fail to achieve meaningful guest adoption, operational impact and return on investment. The issue rarely lies in the technology itself, but in how hotels bring that technology to life.

NOW. CHALLENGES OF HOTEL TECH ADOPTION

Digital transformation isn't about putting technology in place; it's about making it work for guests and staff. Over the years, I've observed three major barriers to successful technological adoption in hospitality:

- Low guest adoption: native apps typically achieve less than 10% download rates because guests are hesitant to install an app for a short stay or a one-time visit
- Fragmented execution: without a coordinated adoption strategy across technology, marketing, and operations, even the best digital solutions fail to scale
- Limited staff engagement: hotel teams are often not properly trained, incentivized, or even informed about the digital tools available, making it difficult for them to encourage guest usage

I have personally experienced entering a hotel room with a digital key, and a housekeeping staff looking at me like I was performing some magic trick. She was not aware that the hotel had digital keys and had never seen guests using them.

NEXT. DRIVING SUCCESSFUL TECH ADOPTION

The most successful hotels recognize that digital transformation is not just a technology rollout, it's a cultural and operational shift. They focus on three essential pillars:

1 ENGAGE GUESTS IN THE RIGHT WAY

- Start with useful, universal solutions, such as digital check-in/check-out, before adding advanced features
- Provide multiple, frictionless access points in addition to native apps, such as web apps, QR codes, or IPTV ordering
- Create value for guests to engage digitally, whether through convenience, loyalty integration, or personalization

2 ALIGN ALL INTERNAL STAKEHOLDERS

- Cross-functional ownership is critical, with management, technology, marketing, and operations working together on tech adoption
- Use the marketing department to drive awareness; operations to ensure on-ground execution; and management to provide the vision and consistency

3 EMPOWER AND INCENTIVIZE HOTEL STAFF

- Frontline staff must understand, trust, and be motivated to confidently promote new tools
- Continuous training prevents technology solutions from becoming "invisible"
- Incentive models tied to digital engagement, like upsells, loyalty enrollments or in-room dining, consistently boost adoption

I've seen hotels reach exceptionally high guest adoption by unifying these three pillars while at the same time dramatically reducing manual staff time and consolidating numerous legacy systems into a single platform.

BEYOND. THE RESULTS ARE MEASURABLE

When digital adoption is planned holistically, transformation drives measurable impact across operations and revenue. Industry examples show that some hotels are now generating tens of thousands of dollars per month in additional in-room dining revenue through IPTV ordering alone, while digital check-in is eliminating the vast majority of manual processing time, freeing teams to focus on higher-value guest interactions. Simplified, convenient experiences also strengthen engagement and loyalty, and hotels that begin with a single high-impact solution like digital check-in are best positioned to expand into additional services effectively.

Staff portal solutions are streamlining processes, saving valuable time, and delivering efficiency across front office operations. In-stay messaging empowers teams to address requests proactively, while guests benefit from seamless convenience and staff benefit from greater clarity and control. These capabilities are becoming integral to daily operations - smart, dependable, and consistently guest-first.

The shift to more personalized arrival experiences has also proven immensely successful according to guest feedback. Through re-engineered workflows, hotels are realizing unprecedented operational efficiency, removing dozens of previously required steps across business units and achieving massive time savings in some processes.

In conclusion, digital transformation succeeds when hotels treat it as a human journey, not a technology rollout. When leadership sets the vision, marketing builds awareness, operations empower staff, and incentives drive engagement, digital tools elevate both the guest experience and the bottom line.

My advice to hoteliers embarking on digital transformations is: Don't start with WHAT technology to deploy, start with WHO will make it work and how you'll bring them along.



HY8



How AI is Powering Efficiency and Imagination in Hospitality Design

Hospitality Design

Lisa A. Haude

Principal-Interior Design, RYS Architects



Lisa A. Haude, Principal-Interior Designer at RYS Architects, shows how AI is becoming a practical creative partner in the studio. She describes using AI to speed up drafting, modeling, admin work, and BIM based visualisation, letting designers test more ideas, reduce errors, and give clients richer, real time ways to see and shape a project. Her main point is that AI should stay in the background as a tool for precision and sustainability insight, while the human side storytelling, taste, and emotional sense of place remains what makes hospitality design truly memorable.

Technology has long been a powerful disruptor in design, often for the better. Advancements in drafting and modeling software have elevated our capabilities as architects and interior designers. Yet with rapid change, we must carefully evaluate the level of disruption we invite into our processes. Some innovations are transformative, while others, like the introduction of AI, require deeper thought, testing, and measured implementation.

In our practice, we're exploring AI tools to streamline production tasks like drafting, modeling, and administrative support. The goal is simple: enhance efficiency and quality so our teams can focus on what they love most—design and storytelling. Through these integrations, we can rapidly explore concepts, visualize environments, and harness advanced data analytics. The speed at which information can now be collected and processed amplifies our capacity to curate and refine spaces with greater intention.

AI'S IMPACT IN ACTION

In interior design, AI has created a platform that expands how we see space. Owners can clearly understand outcomes, essentially picture-perfect, whether through a single rendering or an immersive walk-through. These platforms allow us to instantly generate multiple design variations—from layouts to materials, lighting, and finishes—so clients can compare options side by side and make confident decisions. This interactivity also heightens the level of engagement as it invites them to actively participate in the design process.

With proper implementation, AI automates repetitive tasks like scheduling or single-entry data tags, which helps to reduce errors and ensure uniform consistency. Beyond this, AI aids with administrative workflows and project-management assignments—essentially freeing up designers to focus on ideation, innovation, and collaboration. By minimizing errors and streamlining details, designers can zero in on the creative aspects of a project to guarantee that artistry is never compromised by the mechanics of production.

By combining AI with BIM technology, we can envision spaces in real time and apply different materials with precision. This transforms complex projects into clear, shared experiences. For example, when designing a highly detailed ballroom, AI-driven visualization gave us the freedom to test options and communicate construction details more effectively. The process saved time, reduced errors, and empowered creativity—delivering a space that was both technically sound and artistically expressive.

LOOK AHEAD INTO THE FUTURE

Over the next five years, AI will amplify inspiration rather than replace it. Routine workflows will become increasingly automated, while complex design details will be communicated more seamlessly among architects, designers, engineers, and contractors. Additionally, the ability to analyze sustainability and material performance in real time will provide insights that allow us to make smarter choices for energy efficiency, durability, and environmental impact.

We also anticipate new AI applications to emerge in the hospitality design space. AI encourages architects to quickly generate design options, curate with accuracy, and give clients the means to interact with layouts, finishes, and experiences in real time. In the hospitality industry, these capabilities translate into guest-centric spaces that are adaptive, sustainable, and memorable. The integration of AI is transforming design into an interactive journey—one where ideas flow more freely among architects, designers, engineers, and clients, creating spaces that are both innovative and highly responsive to human needs.

EXPECTATIONS FOR AI

AI should remain a silent partner in the studio (i.e., accelerating workflows, eliminating errors, and verifying technical accuracy) while imagination remains at the core. We are the storytellers, shaping spaces with identity, meaning, and artistry. After all, AI can't feel or experience like humans do. The balance lies in collaboration: machines manage precision, humans craft vision. Together, this ensures that each space reflects talent, purpose, and efficiency. Machines support our craft; humans bring it to life.

AI will not replace architects and designers; it will boost our ability to be creative and efficient. For firms, this means faster growth, stronger market positioning, and the capacity to take on larger, more complex projects. For clients, it means a smoother, more interactive design journey where they feel heard, involved, and confident in the outcome.

PURPOSEFUL IMPLEMENTATION

As with any new technology, discernment is key. There is a wide range of AI models available, and it's easy to adopt them simply for the sake of novelty. The most important lesson we've learned is to explore carefully and evaluate whether each tool is truly beneficial and achieves its intended purpose. Purposeful implementation ensures that AI complements, rather than overshadows, the craft of design so that architects and designers focus on what cannot be automated: creativity, storytelling, and human-centered design.



HY8



Context-Driven Hospitality: The Next Evolution

Hybrid intelligence

Rok Kokalj

Co-founder & CEO, Nevron



Rok Kokalj, Co-founder and CEO of Nevron, describes “context-driven hospitality” as the next step for an industry facing uncertainty and rising complexity. He argues that hotels should move from binary thinking to hybrid intelligence, building clear identity and purpose first so technology, especially AI agents, can support human connection and turn back-end complexity into front-end simplicity that feels seamless for guests.

Scientists, thinkers, and visionaries from all corners are saying the same thing, no matter the context they’re describing: We are living in extremely unpredictable times. The hospitality industry is probably one of the most complex industries there is, since it is braided by so many influences and factors, and is strongly dependent on all sorts of context, from geography and culture to technology to the most unpredictable one, people’s moods and behaviour.

When looking into the future and trying to navigate through all the upcoming changes, unexpected turns, and countless speculations, one can easily get lost in the overwhelm. The questions, like “Where do we begin?”, “Whom do we trust?” and “Which end to hold?” reappear again and again.

My detailed observations of the world at large, the hospitality industry, and global trends keep leading me to the philosophical ground on which we might consciously build the hospitality of tomorrow. Here’s my visionary thinking on how to move with the flow, not against it.

THE ROOTS OF THE WORD HOSPITALITY

Sometimes, looking back at the basic terminology helps us anchor in the “why”, so we can find our way back to the “how”. See, where I come from, we don’t use one word for both the hospitality industry and for the phenomena or the atmosphere of hospitality. The Slovene word for the experience of hospitality is “*gostoljubje*,” which could be translated as “to greet your guest with an open heart.”

gostoljubje -a s (ú)

Literal: Guestloving

To greet the guest with an open heart,
to show or accept hospitality.

// gostoljubnost: *to be hospitable*

“He enjoyed his hospitality for an entire month.”

Hospitality is one of the last industries where human connection isn’t optional: it’s the heart of the business and the main product.

My first forward-looking thought is actually the return to the basics of human connection that we might have started to lose along the way. Hospitality is, and must remain, a human-first industry. And to bring our humanness back to the forefront again, we need to incorporate technology that handles the heavy workload so people can practice “*gostoljubje*”.

EMBRACING THE COMPLEXITY AND NON-BINARY THINKING

Read any respectable writer, talking about anything from environmental issues to cultural dynamics or business challenges, and you’ll get to the same conclusion: to solve any of the large-scale imbalances, a new way of thinking and acting is required.

In hospitality, we can observe how people are standing on two riverbanks, which sounds like: human vs. tech; global vs. local; standardization vs. personalization; nostalgia vs. futurism; and the list goes on. Taking sides and arguing against the other opinions will push us even further down the rabbit hole. If we can incorporate non-binary thinking or start with hybrid thinking (‘and’ instead of ‘vs.’), we will see that contradictions are not problematic; they’re invitations to collaborative action.

TECHNOLOGY MUST HAVE A SEAT AT THE TABLE

Speaking about technology as simply a tool is an outdated perspective. Hospitality is entering an age where hybridity (human + tech) is becoming a new operating system, not merely another update. The question is whether we understand how to use technology properly (or, shall I say, collaborate with it) so it serves as a bridge between hoteliers and guests.

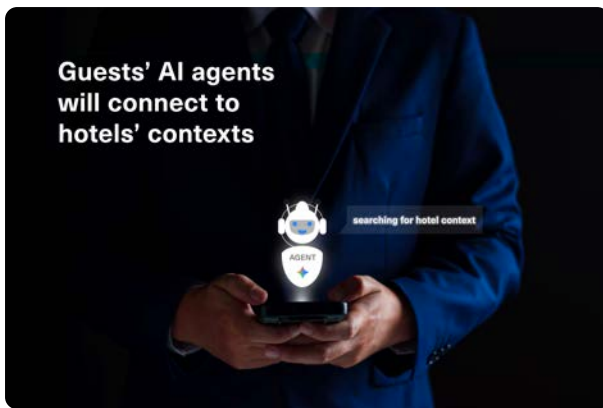
Technology can be our ally and is supposed to reduce friction between a guest and a host. It should create an open space for relationships between people. But what we’re seeing right now is quite the opposite of that. Today, technology is still used as the third entity in relationships, preventing people from having real contact. We need tech that keeps hospitality a people-first industry, where tech is here to enable connection, not mask it.

AI AGENTS AND THE IMPORTANCE OF CONTEXT

One of the most useful tech for hospitality will be AI agents, as most of us already know. You will need to tell them stories, based on which they’ll be able to build their own characters. Bet that if you didn’t put enough thought into developing your business persona, identity, and story, your AI agent will be sort of “dry”, generic, and without many emotional intelligence factors.

AI agents are systems that perceive, decide, and act within a digital (and sometimes physical) environment. Unlike simple bots that respond to single prompts, agents can carry memory, act autonomously, collaborate with humans, adapt to situations, and learn — learn fast!

I suspect that the incorporation of AI agents will bring the most significant changes in hospitality in the next couple of years. And this technology will surely shine a light on all the contextual and branding gaps that hoteliers haven’t yet faced.



WE MUST WORK ON THE CONTEXTUALITY FIRST

Context must be one of the most underrated phenomena in business, strategy, and even in relationship dynamics. Context is literally everything. It is like glue that keeps all the pieces of the story/situation together. And the context in hospitality is still widely misunderstood.

When I speak about context, I'm also talking about identity or the personality of a hotel as a main part of your hotel. Not simply the branding, nor the décor, but the living character.

What keeps all of these aspects of the context together, what breathes life into "the bricks of your building," are the soft themes, like: your vision, your values, what you stand for in the world, what types of experiences you want to provide for your guests, etc. Work on these, and it will be easier to "feed your AI agent" and also to stand your ground, no matter the disruption on the horizon.

LEARNING TO TRANSLATE BETWEEN FRONT-END SIMPLICITY AND BACK-END COMPLEXITY

Another hard nut to crack, and the specifics of today's (and especially tomorrow's) hospitality, is the widening gap between what is going on "behind the veil" and what guests see in front of them.

Hotels are wrestling with rising complexity across business models, regulations, data systems, AI tools, and more. One can easily lose one's mind trying to navigate through the labyrinths of back-end complexity. But guests simply don't care about any of this. They want an experience that feels simple, intuitive, and comfortable.

The hardest thing is to master creating something that feels simple. It means you must tame the dragons of background complexity, so they don't leak into front-end experience. It requires extraordinary amounts of discipline and skills to keep the logistics hidden. I think that hotels that manage to work their way through these labyrinths have a chance for a serious strategic advantage, since seamlessness is becoming a new form of luxury.

HOSPITALITY HAS A LARGER ROLE ON THE STAGE

I've put quite a bit of thought into how primary motivations for traveling have changed over the past decade or so, and how they will continue to evolve. I could say we're experiencing radical changes in how we travel and why we do it. Travel no longer seems to be a pause or escape from life; it is life. It's how people explore who they are becoming, how they reimagine their lives, how they create, and how they make sense of this beautifully chaotic thing called living.

I believe that hospitality is the perfect crossroads of people, cultures, ideas, and offerings, and thus it has the power to transform cultural narratives. My bold claim is that hoteliers can become facilitators of better human experiences.

FUTURE-SIGHT PREDICTIONS

Based on my daily research, conversations with industry leaders, curiosity, and my own observations of where global patterns are heading, here are my modest predictions for the coming years:

- AI agents will navigate conversations between themselves (the hotel's agent and the guest's agent). This means conversations will no longer be limited to humans.
- Hotels may stop copying global trends and start designing for local contextual intelligence. We strive for diversity, not sameness, and hotels have the ability to provide it.
- Simplicity will become a luxury, and friction-free journeys will define premium hospitality. We need to start treating simplicity as a gift.
- We are stepping into the era of hybrid intelligence, where, hopefully, humans and technology will collaborate and co-create.

If we learn to read context, design with intention, and collaborate with technology rather than resist it, hospitality might become exactly what people need most in uncertain times: a place where life makes sense again.



HY8



10 Agentic AI Trends That Will Redefine Hotel Operations in 2026

Agentic AI

Florian Montag

Vice President of Business Development, Apaleo



Florian Montag, VP of Business Development at Apaleo, argues that 2026 will be the year agentic AI quietly becomes the backbone of hotel operations, moving from experiments to embedded agents that coordinate housekeeping, distribution, guest requests and transactions in the background. He outlines ten trends showing how hotels that modernise their tech stack can reduce labour pressure, improve margins and win in an AI-driven distribution landscape.

The year 2026 is when agentic AI quietly slips into the background infrastructure of hotel operations. It will gradually support more decisions, more workflows, and more guest experiences than many expect.

This shift matters because hotels have reached a breaking point with complexity: too much manual work, too many disconnected tools, and rising costs that outpace revenue. The next wave of agentic AI solves that by enabling a level of autonomy we've never had before – reducing labour pressure, improving margins, and strengthening distribution.

Below are the ten trends that will shape this transformation and their expected impact on commercial performance.

1 AGENTIC AI BECOMES THE DOMINANT OPERATIONAL MODEL

In 2026, hotels will move from merely experimenting with AI to embedding agents directly into daily operations. These agents will configure rooms, prepare arrivals, handle routine guest requests, monitor anomalies, and support teams across departments. The result is reduced labour dependency at a time when payroll remains the industry's largest cost, fewer operational errors that quietly erode revenue, and higher overall team productivity.

2 STRUCTURED AGENTIC FRAMEWORKS EMERGE

Hotels are beginning to adopt structured, modular agent architecture – layers for service, data, and reasoning – enabling scalable deployment of AI agents. Instead of improvised use cases, hotels will start building AI ecosystems that behave predictably and improve over time. This ensures predictable ROI rather than scattered experiments, and reduces the cost and time of rolling out new AI use cases.

3 AGENT-TO-AGENT (A2A) COMMUNICATION TAKES OFF

One of the most exciting developments will be agents 'talking' directly to each other, across systems. A hotel's internal agents will begin communicating with external travel, distribution, and service agents in real time. Rates, availability, preferences, and upsells will be negotiated automatically. This reduces reliance on human intermediaries and manual rate changes, while increasing conversion by reacting instantly to market demand.

4 A NEW DISTRIBUTION LAYER EMERGES AS PERSONAL ASSISTANTS GO MAINSTREAM

While it may be early to claim that A2A systems will fully transform hotel distribution by 2026, one shift is already taking shape: personal AI assistants could become a primary gateway to the internet. As travellers increasingly delegate search, trip planning, and booking tasks to these assistants, hotels must recognise them as an emerging distribution channel.

Rather than relying solely on traditional third-party platforms to surface inventory, hotels will need to optimise for discovery, relevance and conversion within these AI-driven ecosystems. Over time, this could evolve into autonomous negotiation between hotel and assistant-side agents. This creates a potential to shift bookings from high-cost OTAs toward lower-cost AI-driven channels.

5 AGENTIC SEARCH REPLACES STATIC QUERIES

Agentic search will play a larger role in the booking stage of trip planning: guests will get hyper-specific accommodation matches that no traditional search filter could deliver. We can expect operators to increase their investments in agentic AI to not only improve visibility but also bookability on AI platforms such as ChatGPT and Google AI Mode. This increases direct conversion by matching guests to better-fitting inventory, while enhancing upsell potential because agents understand context.

6 AGENTIC TRANSACTIONS GRADUALLY BECOME THE MAINSTREAM

Agents won't just gather information, they'll complete tasks end-to-end. We expect to see agents modifying reservations, triggering housekeeping tasks, applying upsells, adjusting amenities, reallocating rooms, and even initiating secure payments. The shift marks the beginning of self-executing hotel operations, where agents complete workflows instead of staff coordinating them. This reduces staff workload and payroll pressure.

7 OPERATIONAL AUTONOMY ACCELERATES

As A2A communication and agentic transactions mature, hotels will enter the first real phase of autonomous operations. Agents responsible for housekeeping, maintenance, CRM, and distribution will coordinate among themselves. Many workflows, such as arrival prep, housekeeping planning, and special-request or VIP setups, will start happening entirely in the background. Agentic AI will push autonomous operations to a level the industry hasn't experienced before. This enables leaner staffing models without degrading service quality. It also improves consistency, leading to better guest ratings and repeat stays.

8 REINFORCEMENT LEARNING MAKES SYSTEMS TRULY INTELLIGENT

By late 2026, we'll see more agents learning from outcomes rather than relying on fixed rules. What actions increased guest satisfaction? Which workflows saved the most time? Which upsells performed best? Agents will gradually optimise themselves, becoming more context-aware, personalised, and nuanced without constant manual configuration.

9 LEGACY INTEGRATIONS BECOME BOTTLENECKS

Hotels will increasingly realise that yesterday's integration models and legacy all-in-one systems can't fully support autonomous workflows. It's not that old integrations suddenly "get worse" – it's that agentic AI relies on a new style of lightweight, flexible, scalable connectivity that legacy structures simply weren't built for.

10 CLEAN API STRUCTURES BECOME A STRATEGIC REQUIREMENT

The underlying API architecture becomes the deciding factor in how far a hotel can go with agentic AI. Only a clean, modular API layer can support A2A communication, agentic actions, and rapid deployment. An API-first infrastructure directly shapes a hotel's distribution performance in an AI-driven booking era. This kind of future-proofed foundation also strengthens asset value, as properties with modern, flexible tech stacks consistently attract higher investor confidence.

CONCLUSION

In 2026, agentic AI will become a practical pathway to leaner, more autonomous hotel operations. The opportunity is real, but it requires hotels to invest in clean data foundations, embrace open architectures, and be willing to experiment by starting small with high-impact workflows.



HY8



Beyond the Room: What the Next Era of Hotel Growth Will Look Like

Future growth

Emily Weiss

Global Travel Industry Sector Lead, Accenture

accenture

Emily Weiss, Senior Managing Director and Travel Industry Lead at Accenture, argues that the industry cannot rely on higher ADRs to grow as RevPAR growth slows and costs rise. She explains how hotel brands are already shifting toward revenue beyond the room and stay, using retail and e-commerce, bundled experiences, and next generation loyalty to keep guests engaged before, during, and after a visit. The message is clear: winners in 2026 and beyond will build lifestyle ecosystems that fit into how guests live and shop, not just how they sleep.

For years, rising average daily rates (ADRs) and strong traveler spending have been comforting signals for the industry. If rates were healthy and guests were still willing to pay for great locations and great rooms, things felt stable. But anyone looking ahead can see the ground shifting. In fact, [CBRE](#) forecasts U.S. RevPAR growth of only 0.1 % in 2025, reflecting weakening occupancy and rising cost pressures.

Travelers preferences are changing faster than the traditional hotel model, and the next phase of growth will not come from nudging ADRs a bit higher. It will come from reimagining the hotel as something bigger. A lifestyle hub. A retail touchpoint. A place where the brand relationship deepens long after the guest has checked out.

Accenture's new research, "[Beyond the Stay: Rethinking Value in Hospitality](#)," makes this point very clear. 90% of hotel executives say they are already exploring new revenue streams outside the room. That number alone tells us the industry isn't simply experimenting around the edges. Leaders are recalibrating, and the reason is straightforward. A guest in 2026 will walk in with expectations shaped not by other hotels but by the best experiences in their everyday life. Whether it is ordering groceries in minutes or watching streaming apps serve up perfectly tailored recommendations, travelers are now accustomed to convenience, personalization and control in almost everything they do. They expect the same from hotels.

This is why room revenue, even with rising ADRs, can't carry the full weight of future growth. Guests want more from their stay and from the brand behind it. Think curated welcome amenities that actually reflect their tastes, not a generic one-size-fits-all package. Easier spa and dining reservations without having to call the front desk. A room where their preferences follow them automatically. Smart recommendations for activities that feel tailor-made. And once they return home, personalized offers that extend the experience and keep the connection alive. All of this adds up to new opportunities to create value at every touchpoint, not just at check-in.

One of the biggest shifts we will see is the rise of retail, lifestyle merchandising and e-commerce as real revenue engines. Hotels are increasingly turning the most-loved parts of the stay into products guests can purchase. The mattress, the bathrobe, the room scent, the lighting design. Luxury and boutique brands are already leading the way with high-quality merchandise that feels aspirational. And some are going even further, offering full home collections with linens, décor, furniture and locally curated products.

This isn't souvenir shopping, it is brand extension that enables guests to take a little piece of the experience home and interact with it every day. Interestingly, many are buying items from hotel's e-commerce websites as a status piece without even staying there,

E-commerce is accelerating this trend, expanding the audience far beyond people standing in a lobby store. Today, four types of buyers are fueling hotel retail growth. There are loyal guests who want to recreate the stay at home. Aspirational travelers who love the brand identity. Remote buyers who may never have entered the property but want to gift branded items to others. And design enthusiasts who follow limited-edition collaborations. The key here is that retail revenue is no longer confined to occupancy or foot traffic. It can grow independently of the physical stay.

Another area gaining momentum is bundled experiences. **Marriott's** "travel retailer" model, where Food & Beverage (F&B) perks, room attributes, and wellness packages will be offered as bundled packages like shopping carts on any e-commerce site, is an early signal of where the industry is heading. By bringing together room attributes, dining credits, wellness services and activities in one clean digital flow, hotels can remove friction from the planning process. Travelers appreciate simplicity. They also appreciate knowing they are getting value without hunting across multiple sites. Bundles help hotels capture more guest spend inside the ecosystem and create a sense of clarity and convenience that is especially valuable during multi-night or multi-family trips.

Loyalty programs will also look different in the years ahead. Many hotels still see loyalty as a retention mechanism, but that mindset is changing. Loyal guests spend more, accept higher prices more readily and engage more deeply when programs feel personalized. The next generation of loyalty will tap into these patterns with dynamic rewards, micro-upgrades, personalized offers and incentives tied to behavior beyond nights stayed. Accenture's research shows loyalty remains underused with 41% of hotel leaders still seeing it as retention rather than growth lever even though loyal guests are twice as likely to accept higher prices. We are already seeing strong signals from APAC markets, where consumers are highly responsive to gamified retail loyalty programs and expect the same level of sophistication from hotels.

Across all these developments, one dynamic consistently stands out. Travelers are measuring hospitality against the best digital and consumer experiences in their daily lives. They don't only compare hotels with other hotels anymore. They also compare hotels to their favorite retail brands. This mindset is nudging hospitality leaders to rethink where value is created and how guests experience that value at every step of the journey.

The momentum behind these shifts is strong. 70% of hotel executives expect to see revenue growth from these new models within the next 12 months. 80% expect meaningful returns within two years. In practice, this means more intuitive upsells, better cross-selling, stronger ecosystem thinking and more fluid ways to keep guests engaged long after their stay ends.

The next few years will redefine what it means to be a hotel brand. The winners will not simply offer great rooms. They will build ecosystems of high-margin experiences that fit naturally into the way guests live, travel and shop. Growth will come from reimagining the business model rather than adjusting rates. And the hotels that embrace this shift early will be the ones setting the pace for what hospitality looks like in 2026 and beyond.



HY8



The Anti-Strategy Strategy: How Doing Less Will Win 2026

Commercial strategy

Julia Krebs

Senior Lecturer and Hospitality Consultant, Les Roches Marbella

Les Roches

Julia Krebs, Senior Lecturer and Hospitality Consultant at Les Roches Marbella, argues that the stand-out hotels of 2026 will be the ones that dare to do less, not more. Her “anti-strategy” swaps add-ons and AI hype for staff-led revenue insight, fixing basic integrations, owning slow days like Tuesday, and turning the luxury of less into a clear commercial advantage.

While everyone's chasing AI and adding amenities, the winners of 2026 will be doing the opposite. They'll be carefully subtracting, not adding. Listening, not automating. I have spent years watching hotels make the same expensive mistakes. Adding the same "innovative" features and buying the same "revolutionary" technology. In short, following the same "best practices." The future of commercial strategy isn't in what you add. It's in what you have the courage to remove, ignore or completely reimagine.

POINT 1: THE HUMAN-FIRST REVOLUTION

Your operations staff knows more about revenue than your RMS, empower them through a “Staff Insight Council”. These are the people who understand your channels, your partnerships and even more your real competitive position. So let them have voice in strategic decisions.

THE APPROACH IN 2026: CREATE STAFF REVENUE BOARDS

- Which rooms guests actually request and when?
- Why do direct bookings fail at the last second?
- What amenities get refilled and requested the most (high value) vs. ignored and are untouched (worthless)?

POINT 2: THE ANTI-AI ADVANTAGE

The State of Distribution report showed us that hotels are drowning in complexity. Multiple systems that don't talk. Manual processes eating 40% of the work week with teams that shrink while challenges multiply. AI ranked last, behind everything else. What is the key action you must take before venturing into an AI application for your hotel: Integration. Making existing systems actually talk to each other.

IN 2026, FIX YOUR BASICS BEFORE YOU TOUCH AI. HERE'S A PRIORITY LIST:

1. Connect your existing systems (PMS to RMS to CRS to CRM)
2. Automate the mind-numbing stuff (parity checking, report generation, rate loading)
3. Clean your data (your PMS has too many inactive rate codes)

POINT 3: THE TUESDAY TEST

If you can't fill Tuesday, you don't have a strategy? Every hotel can fill Saturday night. Your revenue culture reveals itself on slow days. Do you panic and discount? Do you close outlets? Or do you see opportunity? A boutique hotel in Bern created "Midnight Rates", giving 30% off if you book after 10PM for arrival on the same night. Why not make Tuesday the "Local Hero Day", everything priced for locals, not tourists.

BUILD YOUR ENTIRE STRATEGY AROUND YOUR “TUESDAY”:

- If it works on Tuesday, it works every day. Price Tuesday for value, not desperation
- Create Tuesday-specific experiences that don't exist on weekends
- Measure Tuesday loyalty (guests who choose you on slow days are your real supporters)
- Staff your best people on Tuesday (that's when creativity matters most)

POINT 4: THE LUXURY OF LESS

Every hotel is adding the same amenities: Spa = "wellness tourism", Co-working space = "bleisure market" and a Rooftop bar = "local experience". You're not diversifying your offers. Stop asking "What else can we offer?". Start asking "What can we stop doing that nobody will miss?". The real innovations are in subtraction, like at [La Moraleja](#), The Quiet Hotel, in Mallorca: Digital and noise detox, no music, no TVs and no small talk. Because sometimes luxury is the absence of something.

THE 2026 UNBUNDLING:

1. Remove three things before adding one
2. Track what guests DON'T miss to book
3. Find one problem nobody else will solve and build your entire identity around that solution

2026 COMMERCIAL STRATEGY RECAP

Commercial success won't come from doing more of what everyone else does. It will come from having the courage to do less, but doing it extraordinarily well. It's focus and choosing to be irreplaceable at a few things rather than mediocre at everything. Because 2026 can bring success for hospitality businesses that build a network with local partners, acting as the facilitator that directs guests to outstanding experiences whether these are created in-house or off-property. These are hotels that have the courage to subtract and the patience to perfect each daily interaction. The question isn't whether you'll adapt...The question is whether you'll lead or follow. Your Tuesday depends on it.



HYB



Top 10 Luxury Hospitality Design Trends for 2026

Regenerative design

Scott LaMont

Chief Executive Officer & Principal, EDSA



Scott LaMont, Chief Executive Officer & Principal at EDSA, outlines ten luxury hospitality design trends that will shape 2026, from mixed-use integration and regenerative landscapes to human-tech balance, embedded wellness, and “destination-first” thinking. He shows how thoughtful, flexible design can turn hotels into living landmarks that serve guests, locals, and the environment while staying adaptable and commercially strong over time.

The hospitality industry is evolving, and with it, the very definition of a destination's value is being redefined. At the heart of this shift, design has become a defining force – shaping a property's identity, elevating its appeal, and influencing its long-term success. Looking ahead to 2026, here are ten luxury hospitality design trends that industry leaders should know as they embark on new projects, renovate existing properties, and look to strengthen their investments.

INTEGRATE HOSPITALITY INTO MIXED-USE CONTEXT

Hotels are no longer isolated enclaves – they are active players in the life of a city. Thoughtful design transforms ‘places of stay’ into spaces that influence circulation, connect community realm, and establish a seamless flow between private and public being. In this way, a hotel can feel both intimate and expansive – a destination within itself and an anchor to the character of the larger urban fabric.

Tip: Transitional plazas, central courtyards, and outdoor lounges that link neighborhoods, retail, and lodging knit the hotel into its surroundings and establish layered experiences for both guests and locals.

CREATE WELL-ACTIVATED VENUES

It is not enough for hotels to be aesthetically appealing. By understanding how land use, revenue, and onsite experiences work together, luxury hospitality design can create immersive environments that elevate guest satisfaction and boost return on investment.

Tip: Integrate areas for flexible programming, capitalize on access to regional experiences and excursions, and define intimate spaces curated for wellness or cultural events that encourage longer stays and more spending.

MAKE SILENCE GOLDEN

Travelers are increasingly seeking destinations that allow them to unplug from the pace of everyday life. This shift presents an opportunity for hotel leaders to reimagine a property as a series of intimate, restorative spaces. By incorporating private terraces or tucked-away nooks, hotels can create moments of calm that appeal that enhance a sense of exclusivity and thoughtful care.

Tip: Incorporate secluded gardens, gentle water features, fragrant plantings, and subtle lighting to craft outdoor retreats that invite reflection and a deeper connection to the property's surroundings.

THE HUMAN-TECH BALANCE

Technology undeniably continues to shape the guest journey – from mobile check-ins and contactless amenities to data-driven personalization. AI and smart systems now streamline operations and allow staff to anticipate needs with unprecedented accuracy. Yet even with these advancements, authentic human interaction remains the element that elevates a guest experience from good to exceptional. The challenge for hoteliers and designers is striking this delicate balance: integrating technology in ways that enhance convenience and efficiency without diluting the warmth, empathy, and intuitive care that make a stay truly memorable.

Tip: Design spaces with flexible infrastructure so smart technology can improve the guest experience without diminishing the personal service and subtle gestures that define exceptional hospitality.

WELLNESS IS THE “NEW ITINERARY”

Wellness today is no longer a discrete amenity or optional add-on. It has become fully integrated into every aspect of the hospitality experience. Travelers increasingly seek environments that support calm and renewal without requiring a scheduled class or curated program. This shift gives hoteliers the opportunity to let design itself become a wellness offering, crafting spaces that invite guests to pause, breathe, and engage at their own pace. From a sunlit terrace opening onto a quiet garden to gently winding pathways through layered landscapes, every design gesture can support wellness a natural, seamless part of the stay rather than a separate activity.

Tip: Shift from prescriptive wellness programming to creating spaces that invite spontaneous, intentional moments. This could take the form of an open lawn for meditation or a sensory rich pathway woven throughout the property.

DESIGN DESTINATIONS, NOT JUST HOTELS

A hotel's true allure isn't measured in square footage. It's felt in the stories it inspires. Exceptional properties are more than places to stay – they invite guests to explore and share. Achieving this requires design that looks beyond the present moment, anticipating how a property can grow, adapt, and evolve with shifting trends and guest expectations. Flexibility in layout, amenities, and communal spaces allows a property to remain relevant and economically resilient over time.

Tip: Treat every design decision as an investment in the future. Adaptable multi-use public spaces and flexible amenities create opportunities for reinvention and enduring relevance in a competitive marketplace.

GENERATE REGENERATIVELY

True regenerative design goes beyond certifications or checklists. It's about shaping a property in ways that leave the land, community, and ecosystem healthier than before. Thoughtful design considers the long-term environmental impact while creating meaningful connections for guests – spaces that feel alive, purposeful, and rooted in their surroundings.

Tip: Look for opportunities to weave nature into the guest experience. Replacing traditional lawns with native plantings, restoring habitat corridors, or integrating natural water features can reduce resource use, enhance biodiversity, and create authentic experiences that connect visitors to place.

BESPOKE PLACEMAKING

While many properties offer similar core amenities, it is essential to move beyond the expected and create experiences that are unmistakably and uniquely a hotel's own. Culinary programs that highlight regional flavors, refurbishing rather than replacing existing site history, and integrating local art or cultural elements craft a richer, more memorable sense of place.

Tip: When looking to renovate or refurbish a site, start by recognizing the elements that already make the property special – its viewsheds, cultural spirit, and unique character – and amplify those qualities.

MORE FUNCTIONALITY, THE BETTER

Every guest arrives with their own priorities, so hotels must plan and accommodate for a spectrum of needs. Design that embraces flexibility with adaptable layouts, multifunctional amenities, and thoughtful infrastructure, allows a property to respond to seasonal shifts and generational preferences. Spaces that effortlessly transform from quiet retreats to lively social hubs not only enhance guest satisfaction but unlock revenue opportunities – extending the property's value and relevance.

Tip: Consider how programming can interact with flexible spaces. Designing areas that support multiple activity types maximizes both guest engagement and operational versatility without requiring constant physical changes.

PRIORITIZE PLACE

The best hotels don't just occupy a location – they define it. Design that amplifies what makes a destination unique creates spaces unmistakably tied to their environment and community. Market distinction is about crafting experiences that guests remember, talk about, and return for – turning a property into a true landmark. Thoughtful use of landscape, architecture, and programming can create signature moments, both small and grand, giving every guest a sense of connection that's impossible to replicate anywhere else.

Tip: Lean into your location and provide an experience that only that location can offer. It is more memorable, even if it is just local coffee.



HY8



No Ads My A*s (or the Slow Googlization of OpenAI)

Post search

Simone Puerto

Head of Emerging Trends and Strategic Innovation, Hospitality Net



Simone Puerto, Head of Emerging Technologies at Hospitality Net, draws a sharp parallel between Google's early "no ads" promise and today's reassurances around ad-free, unbiased generative AI. He argues that monetisation will inevitably seep into AI answers themselves – shifting us from pay-to-rank to "pay-per-mention" in a post-search world where hotels, OTAs and brands compete not for clicks, but for the right to be named by the model at all.

Remember what Google promised?

"Google is a pure search engine, no weather, no news feed, no links to sponsors, no ads, no distractions, no portal litter, nothing but a fast-loading search site."

A vow of ascetic, almost zen-ish minimalism, a manifesto of purity flung into the turbulent waters of the Y2K millennium bug hysteria that electrified the year of the Lord 1999. And yes, the sentence that now reads like an archaic hymn to innocence ended with the most ironic of claims ("no ads") as if the business model of the entire web would not later crystallise around that very fault line. This irony becomes even more striking when one recalls that, in the latest publicly available data, advertising accounted for approximately 76 percent of Alphabet Inc's colossal revenue figure, a reminder that the corporate path from monk-like restraint to maximalist monetisation tends to be very short and very slippery. But I digress...

We stand in front of a similar theatre today. However, the architecture has grown to the size of Comet 3I/ATLAS. The actors who inhabit it wield a form of cognitive power that the early search engines could not even dream of (*ahhhh, remember the piratesque era of AltaVista, a time when the apex of technical ingenuity consisted of sprinkling p*rn keywords in white text on a white background and praying that the crawler, bless its innocent silicon soul, would glide past without realising it had just been digitally mugged?*)

Yet the chorus is the same, almost like a reboot of an '80s classic nobody asked for, the cinematic equivalent of waking up to find that Hollywood has decided the world urgently needs an updated *Back to the Future* trilogy (spoiler: we DON'T!).

Sam Altman, the *pretty-fly-for-a-white-guy* man who repeatedly said in public interviews that he "*hates advertising, man*", now assures us that generative intelligence will keep the answer sacred, that monetisation will remain peripheral, and that truth will not be bent by sponsorships. In a recent interview, he even went as far as declaring that "*ads on a Google search are dependent on Google doing badly*", since if Google gave the best possible answer, there'd be no reason ever to buy an ad above it. A beautiful sentiment, as long as one never actually looks under the carpet...

Because reality speaks with a different timbre. Google Search, YouTube advertising, and the display network generated roughly 265 billion dollars in revenue last year, a figure that essentially mirrors the annual economic output of freaking Finland! If delivering imperfect answers were the condition for sustaining that empire, the implication would be unsettling.

A *What-If?-World* in which Google suddenly "*did not do it badly*" would be a world in which one of the largest revenue machines on the planet evaporated overnight, taking with it an economy the size of a sovereign nation (and by heavy-metal extension, living in a world without Finland would mean living in a world without black metal pioneer band Impaled Nazarene, and I do not want to live in that world. Do you?)

Altman also insisted that ChatGPT would not accept money to "*put a worse hotel above a better hotel*", describing such a scenario as "*catastrophic for your relationship with ChatGPT*". He even claimed that he has "*no idea*" what ads will look like and that ads are "*not our biggest revenue opportunity*", a sentence that belongs to the same literary genre as "*I am only having one pint of Guinness tonight*" (I love that book!).

It is difficult not to feel the echo of Mountain View's early vows. Mark Twain once wrote that *history rarely repeats itself, but it often rhymes*, and the rhyme here is unmistakable. That being said, the announcement that ChatGPT will include advertising should not have surprised anyone. Intelligence at planetary scale is not a Platonic ideal floating above matter. It is computation, and computation is a material process that consumes (too much?) energy, accelerates costs, and demands an economic substrate robust enough to sustain its own gravity. The dream of a pure and uncorrupted, almost Marxist AI, generously subsidised by benevolent capital, is as fragile as Google's early purity. Because purity remains intact only as long as the infrastructure remains light. But as soon as the system acquires weight, monetisation follows with the inevitability of a physical law, and as I write this, ChatGPT has reportedly over 800 million weekly active users, which is the kind of scale that makes purity feel like a nostalgic hobby.

So, how will these ads look anyway?

Hard to say, but we are already watching the hyperlink economy dissolve into something else entirely. What once was a centrifugal architecture built on exits, citations, and blue links pointing toward what is now defined as "*the open web*" is mutating into a centripetal chamber where discovery no longer happens across a SERP but inside a single linguistic organism. *AI as the ultimate UI*. Google's AI Overviews have already revealed the blueprint: AI ads are no longer positioned beside the answer; they begin to bleed INTO the answer, merging with the synthetic prose of the model, becoming indistinguishable from the epistemic tissue they inhabit, a kind of semantic osmosis where *e-commerce* and *e-cognition* share the same bloodstream.

This is the logic behind what I described in (too many?) articles as "*pay-per-mention*", a clear departure from the familiar pay-to-rank, CPM, and CPC advertising models we know, a shift toward an economic architecture that I suspect will dominate this "*post-search*" decade.

The reassurance Altman offers, the promise that generative systems will remain incorruptible, reproduces the exact optimism that shaped Google's original pledge. With the aggravating factor that I genuinely think Google, in its proto-adolescent, almost Edipian phase, might have actually believed its own rhetoric, while Altman is performing a sort of strategic innocence, a curated naivety designed to make him look like the kid who stumbled into the cockpit by mistake (*hey, after all this is the same guy who, speaking on Capitol Hill, declared that he does not hold equity in OpenAI and that he earns simply enough to cover his insurance expenses...*)

I do not want to sound strongly anticapitalist here, although the sentence writes itself, but no system that earns a commission on hotel bookings can remain epistemically neutral. Even if the commission is flat, the medium shapes behaviour long before money even circulates.

So my take is that what will emerge is not a new ad format but rather a new epistemology. The interface becomes the marketplace, and the marketplace becomes invisible.

For hospitality, this is not an incremental shift. It is a rupture that cuts through the entire ecosystem of discovery. Hotels will no longer compete for pages or rankings; instead, they will compete for the right to be mentioned by the models. **Mention-as-currency.** OTAs, brand.com and metasearch engines will recede into a background substrate that feeds ARI to an agent that never reveals its sources. Brand protection, as we know it, might continue, although the upper funnel melts into a precognitive zone where desire is shaped before the user even realizes that they are searching.

Generative advertising will resemble less campaigns as we know them and more something new: some kind of *narrative engineering*. Product, language, and monetisation fuse into a single autonomous current. The model becomes strategist, storyteller, and transactional. Because, as I wrote many times, the coming decade belongs to ecosystems in which discovery, persuasion, and transaction are not stages in a funnel but different crystallisations of the same linguistic field.

To cut a long story short: returning to that 1999 claim is not an exercise in nostalgia. It is a reminder that *purity is always temporary*. Google once promised a search page free of ads. OpenAI today tells us it will preserve integrity. Perhaps it will attempt to do so. Perhaps it even believes the promise. Yet the gravitational field of monetisation bends everything within its radius, and generative systems are not above ideology. They are the place where ideology becomes syntax.

The question is whether we have learned anything from the first cycle of the web, whether we can recognise the precise moment when purity begins to corrode, or whether we will once again accept the erosion as a naturalised truth of the digital universe.

Or if we are brave enough to bite, as Trent Reznor would put it, the hand that feeds...



HY8



The AI Shift: Rethinking Digital Ads in Hospitality's F&B Sector

Data-driven storytelling

Kalani Bandaranayake

*Ex-Cluster Assistant Director Digital & E-Commerce, Raffles Doha and Fairmont
Doha*



Kalani Bandaranayake, Ex-Cluster Assistant Director Digital & E-Commerce at Raffles Doha and Fairmont Doha, explains how AI is turning F&B marketing from guesswork into a living, adaptive system that listens, learns, and reacts in real time. She shows how unified data, weather and event-based personalization, and smarter, more responsive campaigns can lift performance, but insists that the real advantage will belong to teams who pair algorithmic precision with human empathy so ads do not just reach guests, they genuinely resonate with them.

Hospitality, at its heart, has always been about being one step ahead reading a guest before they even say a word. That used to come down to instinct and experience. These days, it's something more. We're surrounded by data, and with AI coming into the picture, that "sixth sense" is getting smarter and faster. In food and beverage especially, the way we market and connect is starting to change and it's only going to accelerate over the next few years.

Historically, marketing in hospitality leaned more on creativity than analysis. Campaigns were shaped by intuition, timing, and experience a kind of culinary instinct for what might resonate. Today, every click, search, and review leaves a trail of data that reveals what guests want. The next wave of marketing belongs to those who can turn that signal into strategy.

With AI, brands can now anticipate intent, generate tailored content in real time, and optimize performance even before a campaign fully rolls out. What once took days of analysis now happens in seconds and that changes everything.

In my work with F&B and hospitality teams, I've found the real transformation isn't just in the tech it's in the mindset. The most forward-thinking brands aren't just using better tools; they're asking better questions. What made this campaign resonate? What emotion did we overlook? What moment did we miss?

According to McKinsey, AI could unlock hundreds of millions in value for the F&B sector by 2030 specially through smarter marketing, deeper analytics, and more personal guest experiences. We're already seeing a shift from static campaigns to adaptive systems that tweak visuals, messaging, and timing based on live performance. It's not about creating more content. It's about making content smarter.

Here's where things get interesting: advertising isn't just reacting anymore it's adapting. Fast. Soon, we'll see ad campaigns that shift on the fly based on the weather, the time of day, or even the vibe of a local event. That's not a sci-fi scenario it's where things are heading, especially in food and beverage.

Unified data platforms will allow brands to see the full picture connecting online orders, loyalty programs, table bookings, and guest reviews. This will create a far more complete understanding of the customer journey. Picture a brunch café increasing smoothie bowl ads when the forecast calls for sunshine. Or a fine-dining restaurant boosting seasonal menu promotions ahead of a local holiday.

Weather-based personalization is gaining traction. Studies show that tailoring ads to local weather and timing can lift engagement and sales. One study found that apps using weather-triggered offers saw an 8.2% increase in user engagement compared to standard promotions, Tonkova, E. (2023). Marketing Apps in Small Businesses in the Context of Digitization

And it's not just big hotel groups that are innovating. Smaller restaurants and local operators are tapping into AI through affordable tools built into social platforms. The kind of precision marketing once limited to global brands is now within reach for small teams and it's changing the game.

Of course, not every market will move at the same pace. Regional regulations, brand maturity, and budgets will all play a role. Some businesses will embrace automation rapidly, while others will double down on trust and transparency. The winners will strike a balance between automation and authenticity, data and design, intelligence and emotion.

It's worth repeating: AI isn't here to replace creativity. It's here to elevate it. The true power of AI lies in helping us understand not just what guests do, but why they do it. The best F&B marketers won't be the ones posting the most they'll be the ones listening the best. Those who combine algorithmic precision with human empathy will stand out.

This shift also calls for breaking down silos. Marketing teams must understand data. Analysts must appreciate storytelling. And leadership must guide ethical AI adoption that protects privacy while encouraging innovation.

This transformation isn't just about the tools we use it's about the culture we create. In a digital-first world, hospitality still needs a human heartbeat. Sure, advertising is becoming more predictive, more personalized, and more performance-driven. But it's our job to make sure it doesn't lose its soul.

In the end, it's not just about getting in front of people it's about getting them. **The best campaigns won't just show up in someone's feed. They'll feel like they were meant to be there, in the moment.** That's where AI has real power not in replacing creativity, but in helping us be more in tune with the people we're trying to reach.



HYB



The Future of Hotels: Social Vibes Supported by Robots and Technologies

Hybrid hospitality

Dr. Meng-Mei Maggie Chen

*Author of Hospitality Vibes and Associate Professor, EHL Hospitality Business
School*



Dr. Meng-Mei Chen, Author of Hospitality Vibes and Associate Professor at EHL, imagines a near future where travel journeys are stitched together by AI, robots, and smart environments, but the real magic of hotels comes from “vibes hosts” who curate social connection, shared hobbies, and meaningful moments between guests. She argues that as agentic AI, IoT, and robot-as-a-service quietly handle logistics and chores, hotels can evolve into social hubs where people choose to stay not for the tech, but for the relationships and community they experience.

Imagine planning a vacation where everything just flows. You tell your virtual assistant you want a week away with your partner. Instantly, it suggests three perfect destinations, tailored to your travel history and even your biometric signals during past trips. You pick your favorite, and your assistant takes care of the rest—bookings, preferences, and sharing your global traveler ID so every company along your journey knows exactly how to make you feel at home.

When you arrive, a driverless car is waiting. Insurance is calculated on the fly, based on real-time traffic and weather. At the hotel, there's no check-in line—just walk straight to your room, already set up to your liking, thanks to your personal data. The room's environment keeps an eye on your comfort and health, and if anything seems off, your wearable device quietly alerts your doctor's AI assistant. Even the shower cleans itself, ready for your next use.

But the real magic happens outside your room. In the lobby, you meet your vibes host—a hospitality pro who's also a piano enthusiast, just like you. Maybe you'll jam together, or meet another guest who joins in. These spontaneous moments can spark new friendships, just like the last time you played music with a stranger and ended up sharing dinner.

Your partner heads to the golf court and will meet golf buddies selected by the vibes host. Tomorrow, it's racquetball with another vibes host, who is also a certified sports medicine expert. Meanwhile, in the kitchen, another vibes host leads a group cooking session, blending amateur cooks and professional chefs as everyone learns about local cuisine. Dinner is communal, conversations flow, and after the meal, everyone pitches in to tidy up—while robots handle the rest.

Later, you wander to the bar for a TED-style “story night,” where guests share their most memorable childhood experiences, coached and moderated by vibes hosts. Or maybe you'll go for a poker game in the game room. Every event is designed to bring people together, guided by hosts who know how to spark connection.

All these technologies—virtual assistants, driverless cars, smart rooms, robots—already exist and are rapidly improving. As they become more affordable and widespread, hotels will use them to create personalized, home-like environments. Robots will handle the chores, while humans focus on what matters: solving unique problems, teaching machines, and—most importantly—helping people connect.

WHO ARE VIBES HOSTS?

Vibes hosts are the heart of this new hospitality era. They're not just staff—they're connectors, facilitators, and community builders. Skilled in sports, arts, hobbies, and local culture, they attract guests with shared interests and help friendships blossom. Their work is meaningful because it's about building relationships and enhancing well-being. As the hospitality industry embraces this role, vibes hosts will gain new respect and draw more talent to the field.

WHY SOCIAL CONNECTION MATTERS

Humans are social creatures. We need interaction as much as we need food and water. Without it, loneliness sets in—studies show it's as harmful as smoking fifteen cigarettes a day! Yet modern life often gets in the way: urban migration, single households, social media, and remote work can all make us feel isolated.

Hospitality businesses are perfectly positioned to fill this gap. Think of your favorite barista or bartender—they're part of your “weak ties,” but can contribute to your happiness through social interactions.

HOW DO WE GET THERE?

While AI often grabs the headlines, building the future of travel requires more than just powerful algorithms. We need to move beyond simply digitizing data and start digitizing entire processes—something agentic AI can help make possible. The digital ecosystem must break down old industry boundaries, encouraging collaboration across transportation and service providers to create truly seamless journeys. Imagine a world where every travel option and complementary service is woven together, offering experiences tailored to your unique history and real-time needs. The Internet of Things will expand far beyond today's electronics, with smart walls and everyday objects equipped with sensors to enhance comfort and personalization.

But it's not just about the digital and virtual worlds. Companies focused on senior care and home markets are racing to integrate humanoid robots and robotic arms into daily life. [Here](#) is the video from Figure 03. Advances in robotic training—such as learning from demonstration, simulations, and the use of digital twins—are making it easier and faster for robots to acquire new skills and share them instantly with others. Companies are training robots in different skills. Once a robot acquires the skill, it can share the skill with all other robots. Simulations and digital twins also enable companies to break physical barriers and train robots in various scenarios within the digital world. For example, creating 500 different table setups or 500 different room configurations is not particularly difficult. Robots will be able to address these hundreds of scenarios. [Here](#) is a video from Nvidia. Once mass production ramps up, new business models will emerge, such as “robot-as-a-service,” making advanced robotics more accessible to a wider audience. Just like your smartphone, these robots will receive regular updates to continue getting smarter and more helpful.

PARADIGM SHIFT

Should we fear AI and robots? Not at all. Technology will continue to advance, but our need for human connection will remain unchanged. The hospitality industry can lead the way, transforming itself into a hub for socializing, guided by vibes hosts who help guests create lasting memories and friendships.

The hotel industry will likely be unable to develop its own industry-specific robots. Yet, the industry must keep a close eye on the robot development, including both robots and robotic arms. Furthermore, new hotel developments or renovation plans for existing projects should incorporate these technologies into their blueprints. For example, the future kitchen may be fully automated and require only one employee per shift, instead of having robots replace every kitchen staff member. It is a paradigm shift for hotel operations.

Nevertheless, vibes hosts will skillfully create a human touch and foster genuine connections with customers. People will be drawn in and choose to stay because of the relationships and meaningful interactions they experience, rather than the technology offered.



HY8



Not another one

AI realism

Andrew Sangster

Owner and editorial director, Hotel Analyst



Andrew Sangster, editorial director and owner of Hotel Analyst, takes a sceptical-but-curious look at AI, setting its impact somewhere between “nothing burger” and “end of humanity,” and ultimately framing it as the next big platform shift rather than a doomsday machine. He explores how AI will reshape hotel systems and roles and argues that the real long-term story is a cultural and workplace reordering where empathy and craft in hospitality gain ground on traditional “exam-tested” professions.

There is a famous British political meme that dates back to the 2017 snap election. In a vox pop, Brenda from Bristol, when asked about the forthcoming election, says: “You’re joking! Not another one”. The same goes for articles about AI. And yes, this is indeed another one (sorry, Brenda).

As a business and finance journalist covering hospitality and related tech developments, I have a simple rule of thumb for dealing with people who make predictions about AI. Rather like the old Yogi Berra joke that predictions are hard, especially about the future, if somebody starts speaking about AI without using the phrase “I don’t know” in at least every other sentence, I suspect they are either a fool or a charlatan.

But this uncertainty surrounding AI, particularly the impact of Gen AI since the launch of ChatGPT at the end of November 2022, does not mean you cannot construct a framework for thinking about the new tech. And while, yes, I don’t know, I can share my framework for approaching the subject.

Let’s start with setting some boundaries. To help set these, I want to reach for the biggest brains in our society, and I think the 2024 Nobel Prize winners are a good place to start.

At the bottom end, by which I mean somebody who is deeply sceptical about the hype, I offer you the 2024 Nobel Prize winner for economics, Daron Acemoglu. He is a professor at MIT and won the prize, jointly, for work exploring why different nations exhibit different economic performances.

Acemoglu reckons that AI will improve global growth by just 1% to 1.5% in total, and mostly thanks to the current investment boom. This is a long way from the McKinsey forecast that global growth is going up three to four percentage points each year.

There is particular scepticism from Acemoglu around the potential for productivity gains, reckoning that total factor productivity (tasks that are automated multiplied by the cost savings) will be just 0.66% over 10 years or just 0.06% a year.

At the opposite boundary, I offer Geoffrey Hinton, the Nobel prize winner for physics in 2024. Hinton is sometimes described as the godfather of AI. A typical quote from him: “AI is going to change the world more than anything in the history of humanity. More than electricity.”

Hinton is currently doing the media rounds, warning of a Terminator-style scenario in which the bots take over.

My final boundary-setting Nobel prize winner from 2024 is Demis Hassabis, the CEO of Google’s DeepMind. Hassabis won the prize, jointly, for chemistry for his work on AlphaFold, which predicts 3D structures of proteins. This AI-enabled process has transformed the economic logic of structural biology.

The Hassabis view is that “AI could bring about a transformation even greater than the Industrial Revolution”. This ties in with the World Economic Forum’s view that sees AI as a cornerstone of a phase in which digital, biological and physical technologies converge to deliver structural, rather than simply incremental, change.

This boundary-setting exercise concludes in a ludicrously wide range, going from a nothing burger to the end of humanity. My view is that Acemoglu and Hinton are both wrong, even if IDK precisely has to be declared.

It is pretty clear already that Gen AI represents a platform shift at least as significant as the internet or the introduction of smartphones. And, since AI is essentially a probabilistic process of determining which token comes next that matches the pattern, Hinton’s fears of a triumph of the bots seems a way off.

Hassabis is at the hype end of the spectrum, but I would suggest he represents our upper bound. For the lower bound, I would head to the technology consultant and commentator Benedict Evans, who says AI is the next 10- to 15-year platform shift following mainframes, PCs, the web, and smartphones (though he keeps his bets open but suggesting it might be more).

As an aside, I think Evans’ statement that “when things are exciting, people get excited” is spot on. He points out that boosters confuse by drawing straight lines on log scale charts. But he also points out that AI is different from previous platform shifts because, with those previous changes, we knew the physical limits of what could happen next year; with AI, we don’t.

At the micro level for hotels, there are three broad types of systems that will be impacted by AI: digital, physical, and service / operational.

The digital impact will be on revenue management, PMS, CRM and guest-journey analytics. Physical is smart building automation, robotics and sensor networks. Finally, labour optimisation, predictive maintenance and wellness or biometric personalisation is where the impact on service and operational systems will be seen.

Let’s take a quick look at the impact of AI on one of those roles, revenue management. If you were to take a discipline most suitable to AI-disruption, revenue management is probably the one because it aggregates huge amounts of data, but the output does not require absolute precision (as in law or finance).

Could AI deliver the same outcome as the automatic lift did for elevator operators? Perhaps eventually, but in the meantime, a significant reduction in headcount is almost certainly on the cards.

AI is already better than humans at demand forecasting, price-elasticity modelling, inventory optimisation, channel mix optimisation, macro pattern detection (of things like events, weather, competitor rates) and real-time repricing at scale.

Humans are still needed in the loop for context interpretation, narrative construction to explain demand forecasts to stakeholders, cross-functional commercial strategy, which requires reconciling conflicting goals rather than optimising a single metric (an example is profit versus guest experience), data quality triage where flawed inputs have to be accounted for, and ethical or brand-sensitive decisions about how far to push pricing.

Over the next five years or so, as many as half of all revenue management jobs may go in the hotel sector (this is a guestimate pumped out by, of course, AI when I submitted suitable context data). Hit hardest will be revenue managers working at economy and budget hotels, with more stickiness for more complex properties at the luxury end or those with significant MICE business.

AI is good at explicit data. In fact, not just good, but typically much better than humans. It is weak at dealing with tacit information, that is, information that is uncodified and context dependent. This might be a GM's sense of how a competitor might react or a sales manager's intuition about a key account.

Tacit information is hard to access because it is not typically recorded, and AI has nothing to learn from. It can often contradict structured data and be ambiguous. It is socially learned and requires judgement.

Given the challenges of tacit knowledge, hospitality jobs, particularly higher-value roles, look set to remain much less vulnerable to AI disruption.

This brings me to the macro-level impact of AI on hospitality. There are two angles I want to explore here.

The first is what the productivity improvements will bring to overall economic growth, and where the extra wealth created will be spent. The last part is easier to predict than the quantum of the first.

We do know that in high-income countries, particularly among the better off, we are seeing a prioritisation of spending on experiences rather than goods. Evidence to support this contention comes from the US Consumer Expenditure Survey, which shows that spending on physical goods has been declining for over 20 years while real household spending on experiences such as travel, dining and entertainment has risen meaningfully. Similar data from the UK and EU can be found.

You can thus take whatever level of extra GDP growth from AI you buy into and translate that into meaningful tailwinds for hospitality and travel.

My second angle is on culture. We have seen in liberal democracies over the past decade or so that James Carville's dictum that "It's the economy, stupid" has much less purchase than it did in Clinton's successful 1992 presidential run.

Looking at cultural positions, progressive versus small "c" conservative, explains as much, perhaps more, about politics than economics alone does.

With AI shifting economic power away from explicit human knowledge, the codified sort tested in exams, towards tacit knowledge, which is normally learnt on the job, we are heading towards a re-ordering of the workplace that might be as big as the political re-ordering we are currently confronting.

In this workplace re-ordering, skills embedded in hospitality, such as the empathy demanded of front-of-house staff or the craft skills of chefs, will be valued more highly. The cognitive skills that lead to the fantastic pay packets of higher professions like law or banking face a comparative decline.

There is much more to say on this cultural shift. But it requires a separate column on AI. Another one.



HYB



Top 10 Branding Trends for 2026

Hybrid branding

Sean Danson

Founder, CEO, Brand Architect, New Pantheon

NEW
PANTHEON
Los Angeles, California

Sean Danson, Founder and CEO of New Pantheon, maps out ten branding shifts that will define hospitality in 2026, from regenerative hospitality and AI-as-infrastructure to immersive storyworlds and quiet, conscious luxury. He argues that the strongest brands will be “hybrid by design,” built from the tension between opposites with employee culture and emotional texture as visible parts of the brand itself.

As I look at where hospitality is heading in 2026, one thing is clear: the future won't be shaped by single forces moving cleanly in one direction. It's being shaped by **collisions**—technology and humanity, stillness and stimulation, global reach and local depth. What emerges next will be hybrid by design: brands built from the tension between opposing cultural energies. Below are ten branding trends I believe will stand out in this increasingly hybrid landscape.

1 REGENERATIVE HOSPITALITY BECOMES THE NEW LUXURY

Sustainability is no longer a differentiator; guests expect it by default. What's new is the shift toward **regeneration**—brands that actively improve the land, community, or ecosystem around them. It's hospitality as a restorative force rather than a “less harmful” one.

Why it matters: Travelers want to feel good *about* feeling good. Regeneration gives them that hybrid value: indulgence without guilt.

2 AI AS INFRASTRUCTURE, HUMANITY AS THE SIGNATURE

Automation and AI are getting good—so good they're becoming invisible. Guests want the frictionless benefits, but they still judge a stay by emotional texture.

Why it matters: The hybrid future is a split model: AI handles speed and consistency; humans deliver warmth, personality, and improvisation. Brands that get this balance right will feel both modern and deeply human.

3 HYPER-PERSONALIZATION WITH CLEAR CONSENT

Personalization is moving from prediction to permission. Guests want tailored stays—lighting, food, rituals—yet only when they've chosen to share those preferences.

Why it matters: The hybrid model here blends intimacy with autonomy. Brands will win trust not by knowing everything, but by letting guests decide how much they want to be known.

4 WELLNESS AS NERVOUS SYSTEM DESIGN

Wellness is expanding beyond spas into the architecture and rhythm of the stay itself. Light, sound, materials, circulation patterns—all become tools for nervous system regulation.

Why it matters: Travelers aren't choosing between escape or recovery anymore. They want both simultaneously. The trend is a hybrid of hospitality and health science, built directly into the guest experience.

5 RADICAL LOCALISM ANCHORED IN GLOBAL STANDARDS

Global guests still want reliability, safety, and competence—but not if it comes at the cost of feeling like they could be anywhere. The winning model blends world-class consistency with deep local identity.

Why it matters: This hybrid approach lets brands stay scalable while still feeling rooted, personal, and culturally alive.

6 PURPOSE AS A SHARED OPERATING SYSTEM

Purpose used to be an add-on. In 2026, it's built into the business model—especially around community uplift, cultural preservation, and environmental stewardship. But the shift is toward **clarity**, not breadth.

Why it matters: Brands that choose one or two causes and execute them well create a hybrid of commercial and civic value that resonates more deeply than broad statements.

7 IMMERSIVE STORYWORLDS REPLACE STANDARD PROGRAMMING

Programming is evolving from a list of activities to a cohesive narrative identity. Guests don't just want events; they want to feel part of a world with rituals, chapters, and continuing storylines.

Why it matters: This hybrid merges hospitality with entertainment design—turning the stay into something guests want to revisit because the world evolves.

8 HYBRID WORK-STAY-PLAY ECOSYSTEMS

Remote work has permanently altered guest behavior. Travelers blend work, rest, and exploration within the same day, and they expect environments that can flex with them.

Why it matters: The future isn't “bleisure”—it's fully hybrid lifestyles. Branding must speak to people who shift modes constantly and want spaces that adapt instantly.

9 QUIET, CONSCIOUS LUXURY OUTSHINES FLASH

Luxury is becoming internally measured rather than externally displayed. Guests now value silence, quality of air, craftsmanship, and ethical sourcing over spectacle.

Why it matters: This hybrid luxury combines minimalism with meaning—a quieter, more assured form of status emerging across high-end hospitality.

10 EMPLOYEE CULTURE AS A VISIBLE BRAND ASSET

In 2026, the guest experience and the employee experience move in sync. Guests can feel when a staff is thriving or depleted, and it shapes their perception of the brand.

Why it matters: A hybrid brand is one where internal culture and external promise align. The team becomes part of the storytelling, not just the service structure.

CONCLUSION

If 2025 was the year when technology, guest psychology, and cultural pressures began colliding, 2026 is the year of synthesis. The brands that will define the next era are the ones that treat contradiction as raw material. AI with warmth. Luxury with restraint. Local depth with global trust. Wellness with science. Purpose with precision. These hybrid identities aren't compromises—they're the new competitive edge.



HY8



AI Adoption in Hospitality: Meet People Where They Are

AI & Robotics

Lynn Zwibak

Founder & CEO of Zwibak | Commercial Strategy

ZRM|

AI may be rewriting hospitality's playbook, but the toughest part of adoption is not the software, it is the quiet anxieties it triggers on the front line. By tracing three common fears that surface whenever AI enters the workplace, Lynn Zwibak shows how leaders can turn resistance into readiness and make change something teams help build rather than brace against.

The adoption of new technology based on AI into the hospitality industry is a hot topic right now. We are hearing how organizations are using it for everything from staffing to revenue management, as well as the positive results. These success stories are often followed by a warning that those who don't embrace these new tools will be left behind.

What is overlooked in this dialogue is the impact of this change on the people who will be using it or affected by it. They are a significant factor in the implementation of a new initiative and need to be brought on board early in the process.

But don't be surprised when members of your team resist the coming change. If not handled appropriately, this can doom the project before it even begins. Recognizing that resistance stems from three common fears will help you address them.

PEOPLE ARE AFRAID OF THE UNKNOWN

If you have no experience with something, it can be scary. Team members may be thinking: "Where do I start?", "Who do I ask if I need help?", "What if I mess up?", or any number of other discouraging thoughts. These thoughts are strong enough to stop people from even considering AI's use in their job or organization.

If your team is stuck in this phase, find a non-threatening way to expose them to AI, even if it is unrelated to how your organization will be using it. Provide them with instructions and some prompts to play around with ChatGPT or Microsoft CoPilot. For example, have them explain a project they are currently working on, then ask AI for a step-by-step guide on how to approach it. Show them how to edit the prompt, then add a request for due dates and milestones. They will be amazed by the thoroughness of the response, and how it likely includes ideas and approaches they hadn't thought of.

This little bit of exposure may be enough to get them over the initial hump of resistance.

PEOPLE ARE AFRAID OF CHANGE

Even if people become comfortable with the idea of AI, it doesn't mean they want it to enter their realm. It is much easier to keep doing what you are doing rather than consider doing something new.

Don't ignore this fear. Meet it head-on by acknowledging that things will be different moving forward. Give your team a clear idea of what that will look like, so they don't assume the worst. For example, identify any new skills that will be required, and explain how the organization will support them in gaining these skills. Share what new tasks they will be required to perform, and how they will be measured. Also, provide reassurance about the areas of their jobs that will not change.

If possible, ease them into the change slowly. Don't uproot everything that will be affected all at once. Can you give them a test version of the new technology so they can start with what comes easily, allowing them to build some confidence? Can they shadow someone who is already using the new technology?

Most of all, you, as a leader, must model the adoption of the technology. Share how you are using it in your day-to-day, or how it is being used in other departments. Be sure to highlight the benefits experienced, such as time saved or error reduction.

PEOPLE ARE AFRAID OF BEING REPLACED

One of the biggest drivers behind the fear of change is the concern that it will render someone obsolete. This threat looms large with the introduction of AI. It is hard to ignore the headlines stating how many jobs are being, or will be, replaced by the new technology.

This is a hard one to deal with, because the truth is that some members of your team may end up being replaced. Don't deny this fact. When/if it inevitably comes to fruition, they will feel betrayed that you misled them.

Instead, gently explain that the best way to stay relevant is to embrace the new technology, not resist it. This isn't meant to be a veiled threat, but rather as an inspiration to take on the new challenge.

New technology brings new possibilities, but it doesn't implement itself. Your people are the critical element that will determine its success or failure. Don't leave them out of the equation. Acknowledge and address their fears, meet them where they are, and build the future together.



HY8



The hidden cost of job shadowing: why hospitality must rethink training

Hospitality training

Guido Helmerhorst

Founder & Partner, ScenarioBox

Guido Helmerhorst, Founder & Partner at ScenarioBox, argues that traditional job shadowing is a hidden tax on hospitality operations – expensive, inconsistent, and completely unmeasured – at exactly the moment the industry can least afford it. He makes the case for digitized, immersive “golden copy” training that takes over repetitive basics, so human trainers can focus on culture, nuance, and guest experience, turning training from operational friction into a true strategic advantage.

After many conversations with hotel leaders and operational staff, I have noticed a pattern that is as invisible as it is costly. It seems to me hospitality leaders do not take risks with revenue management or operational compliance, yet every day we rely on a old training method that is unmeasured, unmanaged, and very expensive. It is the go to method because it is how we have always done it. We hand a new hire a pdf, a uniform and tell them to go follow an experienced colleague. We affectionately call it job shadowing.

While this approach is rooted in a deeply human way of learning, in today's world it hides an enormous labor and consistency cost that most leadership teams simply do not see. It is a strategic blind spot. As we move into a future defined by experiential tourism and labor shortages, this blind spot is no longer just an operational detail; it is a structural disadvantage that deserves attention at the highest level.

THE INVISIBLE COST: WHY JOB SHADOWING IS A HIDDEN TAX

Traditional shadowing is effectively a hidden tax on your operation. It consumes hundreds of hours of work, yet it rarely appears on a P&L statement or a dashboard. Because the cost is buried within the general payroll, we treat these hours as if they were free.

The reality is that traditional shadowing depends entirely on who is available on a given Tuesday. This operational randomness leads to inconsistent results. Your senior staff lose their most productive hours slowing down to teach, while your new hires learn at a pace dictated by the operation's chaos.

This inefficiency bleeds into every corner of the establishment. When a senior staff member is shadowing, you are paying for two people to do the work of one, often with lower output than if the senior person were working alone. It is a massive drain on efficiency that goes unmanaged because we have accepted it as the cost of doing business.

TELLING EXAMPLE: THE REALITY OF HOUSEKEEPING MATH

To make this invisible cost visible, let us look at the reality of an example situation. I recently worked with a hotel chain where we broke down the actual numbers for their housekeeping department to see what "business as usual" was costing them.

The data was stunning. They were hiring about twelve new housekeepers a month. Each new hire spent about twenty-four hours shadowing a buddy. That is nearly three hundred hours of wages paid to people who are not yet productive.

But the math gets worse. You are not just paying the new hire. You are paying the "buddy", your most experienced, high-performing staff member, to slow down. You are asking them to perform two jobs simultaneously: cleaning the room to standard and explaining the process to a stranger. When you add the supervisor's time spent correcting mistakes later, the cost triggers your eyebrows to go up.

In that single department, we calculated over five hundred hours of "ShadowHours" consumed every month.

That is not training, that is operational friction. It is repetition disguised as consistency. If you saw a line item on your P&L for "Repetitive Basics Explanation," you would cut it immediately. Yet, because this cost is hidden within payroll, we let it slide.

It gets worse because in addition to this high cost your operation has to deal with language barriers and "buddy variability." Every trainer teaches their own version of the standard. One might emphasize the bathroom mirror, while another prioritizes the bed tuck, and another forgets half the amenities. The new hire does not learn the brand standard; they learn the shortcut or the personal preference of their specific buddy. You are paying a premium for inconsistency.

THE FUTURE CONTEXT: EXPERIENTIAL TOURISM RAISES THE BAR

This inconsistency is becoming a dangerous liability in the face of experiential tourism. The modern guest is not just looking for a place to sleep; they are looking for authenticity, consistency, and personality. They want to feel the brand, not just see it.

An experiential brand experience cannot be delivered by teams trained ad-hoc. When training is inconsistent, service becomes inconsistent. The experiential traveler notices these gaps immediately. If one interaction is magical and the next is transactional, the spell is broken. Staff capability is the foundation of any future guest experience strategy. If we cannot guarantee that every staff member knows the "why" and "how" of our story, we cannot promise a consistent experience to our guests.

JOB SHADOWING AS OPERATIONAL RISK

We need to elevate this problem from an operational annoyance to a leadership risk. Relying on shadowing introduces three distinct dangers to your business. First, as the numbers show, there is the massive operational drag of lost productivity. Second, there is the inconsistent transfer of knowledge, which dilutes your brand standards. Third, there is a complete lack of measurement.

As hotels race to digitalize everything from check-in to room controls, leaving training in the realm of oral tradition creates a massive drag. It creates a structural disadvantage where your most critical asset, your people, are being onboarded with the least amount of technological support.

THE FUTURE: DIGITIZED, EXPERIENTIAL TRAINING

The solution is not to replace humans with robots, but to remove the repetitiveness that burns out your best people. The future lies in digitizing the "job shadowing" of standards to create absolute clarity.

Let's revisit our housekeeping example. Imagine if, instead of following a stressed colleague, a new hire could watch and interact with a digitized, immersive scenario of your best housekeeper cleaning a room perfectly. We captured a real room-cleaning process with "Obi," a master housekeeper, and it was clearer and more consistent than any written SOP or hurried in-person explanation could ever be. The traditional methods and newer ones like elearning lack one core thing immersive technologies offer: spatial awareness. It allows new hires to visually learn in their working space, a feature that is essential for the operational hospitality environment.

This enables a hybrid model. The foundational skills and non-negotiable standards are learned digitally, ensuring every single new hire sees the "golden copy" of the process. This frees up the human training to be richer and more focused. The buddy can stop saying "here is the soap" and start teaching the culture, the guest interaction, and the nuances of hospitality. Digitization improves quality by anchoring standards, and it frees your staff from the drudgery of repetitive demonstrations.

FORCES SHAPING THE NEXT FIVE YEARS

Several key forces will drive this shift over the next few years. First, persistent labor shortages mean we simply cannot afford slow onboarding anymore; we need people "room-ready" or "operational ready" faster than ever. Second, rising guest expectations mean that experiential consistency is the new differentiator. You cannot have five different versions of service in a five-star hotel.

Third, the democratization of technology means these tools are no longer science fiction; they are accessible and easy to adopt for individual properties. Fourth, sustainability pressures will force us to look at efficiency everywhere, including training. Wasting 500 hours a month is as bad as wasting energy. Finally, data-driven leadership will demand that training impact becomes measurable. We count every towel and every kilowatt; it is time we counted the effectiveness of our training hours.

CONCLUSION: A CALL FOR MODERNIZING TRAINING

Job shadowing has heart, but it has no scalability. It depends on the stamina of your team rather than the strength of your system. If housekeeping can evolve from improvisation to intentional, digitized training, then any department can.

Losing the human connection, you say? I'd argue the opposite. By splitting training into two parts, digitizing the repetitive, and reserving human time for what really matters, you actually increase human connection.

The future belongs to hotels that treat training as a strategic investment, not a routine task to be delegated and forgotten. The invisible cost of job shadowing will remain invisible, quietly eating into your margins and guest satisfaction, unless leadership chooses to acknowledge it and support the teams who carry its weight every day. It is time to stop the drain and start building a system that respects your staff's time and your guest's experience.



HYB



If I were Minister of Food & Beverage

Sustainable gastronomy

Nico Dingemans

Founder and Managing Director, Hospitality in Health (HIH)



Hospitality
in Health

Nico Dingemans, Founder and Managing Director, Hospitality in Health (HIH), lays out a fictional but very concrete National Sustainable Gastronomy Strategy 2026 built around ten "Ps," linking health, environment, innovation, and social impact across the entire food value chain. Framed as a policy letter, it argues that countries must hard-wire sustainable gastronomy into education, procurement, tourism, and measurement systems to turn food into both a wellbeing driver and a national competitive advantage.

Your Excellency, dear Prime Minister,

On behalf of the Ministry of Food and Beverage, it is with great pleasure that I present our National Sustainable Gastronomy Strategy 2026, laying the foundation for the following decade. This strategy articulates our national values, vision, and mission for responsible F&B leadership with a comprehensive socioeconomic plan we refer to as the "Ten Ps," served in three courses: Purpose, People, Partnerships, Place, Products, Policies, Pricing, Presentation, Promotion, and Proof.

Our national strategy employs language that resonates with stakeholders across the value chain from farm to fork. This includes farmers, fishermen, shepherds, agrifood producers, hoteliers, restaurateurs, professional conference organizers, destination management companies, trade centers and event venues, festival organizers, home-based businesses, educators, and associations.

FIRST COURSE

1 PURPOSE (OR PROMISE) - OUR NATIONAL VALUES

Our promise to our guests is anchored in four core values:

- **Health Cuisine:** The ingredients used in our menus are nutrient-rich, promoting immune system function and supporting gut and heart health. Our dishes address allergens and rising intolerances, reduce vitamin deficiencies, and include essential amino acids, fatty acids, macro minerals, and trace minerals. We embrace holistic approaches to food that draw from traditions such as Ayurveda, Macrobiotics, Mediterranean cuisine, Traditional Arabic Islamic Medicine (TAIM), Traditional Chinese Medicine (TCM), and ancestral knowledge of our local food customs.
- **Environmental Stewardship:** The Ministry supports producers who prioritize biodiversity, seasonality, soil health, animal welfare, sustainable fisheries and aquaculture, sustainable agriculture, organic farming, biodynamic farming, permaculture, and nature-inclusive practices. We emphasize the cultivation of GMO-free and antibiotics-free food products.
- **Responsible Innovation:** We stimulate blue economy principles, circularity, zero-waste practices, traceability, protein transition, food integrity, food technology, future food initiatives, urban and desert farming, regeneration, water efficiency, and renewable energy. We prioritize the elimination of plastic, microplastics, phthalates, bisphenols, and PFAS (forever chemicals) in our food and its packaging. The Ministry discourages the promotion of ultra-processed food and beverages that harm our nation's health profile.

- **Socioeconomic Impact:** The Ministry invests in food security, food sovereignty, indigenous food cultures, heritage preservation, rural development, agricultural inclusion, local communities, gender equality, generational succession, reducing import dependency, and shortening value chains. Our national food campaigns align with Fair Food principles, Slow Food values, and the UN Sustainable Development Goals.

THE CHALLENGES

The United Nations defines sustainable gastronomy as "cuisine that takes into account where the ingredients are from, how the food is grown, and how it gets to our markets and eventually to our plates." While it promotes best practices across the entire value chain, it also presents significant challenges. Its cross-sectoral and multidisciplinary nature makes sustainable gastronomy increasingly complex and fluid, complicating efforts to measure and assess compliance.

To succeed, F&B businesses must integrate sustainable systems throughout their operations strategy, encompassing Supply Chain Management, HR, IT, Administration, Assets, Marketing Communications, KPIs, and bonus structures to incentivize team members at all levels. Embracing this seismic shift is essential for policymakers, operators, and educators alike. Cultivating a nationwide culture of sustainable gastronomy should be the foundation of F&B concept design and operations, embedded within our procurement systems and standardized in our service promises and ROI vocabularies.

However, the biggest gap is the lack of a comprehensive multi-metric system to measure sustainable gastronomy across the entire value chain. Currently, there is no AI, smart technology, certification body, or auditing method that captures all the complexities of sustainable gastronomy in a reliable dashboard that can answer the question on both national and international levels: "What exactly are we eating, and how sustainable are our menus?"

We continue to collaborate with certifications, awards, stars, and programs that measure aspects of sustainability in kitchens and restaurants. Nonetheless, many of these programs tend to focus on specific topics, such as food waste, local sourcing, zero plastic, or protein transition. We recognize that overreliance on these programs can lead to narrow or misleading claims and may even contribute to green washing, blue washing, and social washing.

In partnership with the Ministry of Digital Economy, we are working on a comprehensive multi-metric solution that integrates blockchain and AI to monitor, benchmark, and rank sustainable gastronomy. Until this solution is in place, we will utilize best practices to enhance our national database while guiding our stakeholders through the complexities of sustainable gastronomy. Our collaborative approach helps the sector stay ahead of the curve, reduce risk, save time and costs, and improve our national F&B green goals, and ESG monitoring.

MAIN COURSE

2 PEOPLE

Today's youth are tomorrow's leaders. The Ministry collaborates with culinary academies and hotel schools to integrate sustainable gastronomy and responsible F&B management into the national curriculum. Our educational materials reconnect the industry with farmers, artisanal producers, and ancestral knowledge about food, health, and culture. Educating and engaging our future GMs, Executive Chefs, F&B Directors, Marketing Directors, and Procurement Officers is key to driving sustainable transformation. Rooted in culture and shared values, the Ministry's people philosophy for both youth and adult education is based on 4Cs: Cultural Confidence, Connectivity, Charm, and Competence.

3 PARTNERSHIPS – OUR ECOSYSTEM

The Ministry aligned its strategy with international manifestos and guidelines, including the [Lima Declaration](#), [Slow Food](#), [UN Tourism Guidelines for the Development of Gastronomy](#), [Tourism, Sustainable Restaurant Association](#), [World Sustainable Hospitality Alliance](#), and various other global sustainability initiatives. Chaired by our Ministry, the National Sustainable Gastronomy Alliance (NSGA) is a new inter-governmental body involving the Ministries of Agriculture, Tourism, Environment, Health, and Trade.

The NSGA also includes public-private partnerships with educators, industry associations, and trade show organizers related to hospitality and food. Our ecosystem of knowledge partners highlights the holistic and inclusive nature of our strategy. This includes anthropologists, ethnologists, archaeologists, biologists, apiarists, mycologists, viticulturists, zoologists, botanists, herbalists, nutritionists, ecologists, food activists, curators, historians, and foragers.

4 PLACE

Our sense of place is reflected in our national culinary identity, which manifests on three levels: 1. Physically: through our F&B venues across the country, 2. Internationally: by exporting our food culture through trade missions & trade shows and establishing a national culinary equipe for international events, and 3. Digitally: through storytelling on social media and the creation of a national e-library for culinary heritage and innovation.

5 PRODUCTS

The future is local, biodiverse, and inclusive. We incentivize F&B businesses to prioritize seasonal and locally sourced produce on their menus and in their banqueting sales kits. The Ministry fosters procurement agreements with cooperatives and farmers' markets to prevent price-dumping and reduce food loss in the agricultural sector due to oversupply and surplus harvesting. Our Hotel, Restaurant, and Chef Associations are committed to visiting food festivals, tastings, seasonal harvests, and fresh markets each season. Additionally, we created a procurement roadmap aimed at increasing local product purchasing by 10% annually while decreasing imports. We also invest in hackathons, food labs, and incubator programs for local innovators and start-ups that offer solutions to combat the effects of climate change in agriculture, ensure food security, and revitalize local food systems.

6 PROFIT & PRICING (STRATEGY)

Guests are willing to pay for food that does good. The Ministry's renewed value-based approach to Menu Engineering aims to increase average spend while minimizing the potential rise of food costs associated with sustainable gastronomy. In collaboration with our Procurement & Communications Committee - and grounded in the power of storytelling and changing consumer behavior - we support Sustainability Directors and F&B Directors in sharing narratives about sustainable food. The Ministry of F&B emphasizes integrity through traceability to optimize value-based pricing. Additionally, technology-driven zero-waste programs enhance profit margins while reducing food waste.

7 POLICIES & PROCEDURES

Government has a responsibility to lead by example. All policies concerning public tenders for events, functions, and food procurement will adhere to the national strategy. Meanwhile, the NSGA, in collaboration with the Hotel and Restaurant Association, is creating a blueprint of Standard Operating Procedures (SOPs) for sustainable gastronomy for the private sector.

DESSERT

8 PRESENTATION

You can learn much about a country through its food. In collaboration with the Ministry of Tourism, we apply the [Z Steps method](#) to establish Sustainable Culinary Tourism as a new pillar in the national tourism strategy 2026. The food pillar aligns with the UN Tourism Guidelines for Gastronomy Tourism and is founded on five compelling reasons: shifts in consumer behavior, policy and compliance, multisectoral dynamics, institutional factors, and macroeconomic impacts. Key elements include Farm Hospitality, Agritourism, Wellness, Culinary City Breaks, Oleo Tourism, Wine Tourism, and Ecotourism experiences related to food, farming, marine life, and nature. These experiences involve local communities who are often left out of traditional tourism models.

As we anticipate food-related ESG and CSR criteria for international conferences and events, we recognize the Meetings, Incentives, Conferences, and Exhibitions (MICE) sector as a key stakeholder in our culinary tourism strategy. Our primary goal is to position our country as a leading food destination that meets the ethical F&B expectations of both leisure tourists and business travelers, while preserving a healthy food culture for local residents.

9 PROMOTION

The Ministry collaborates with local and international Michelin-starred chefs, as well as leading experts who operate at the forefront of sustainable gastronomy. These champions actively participate in our culinary campaigns, conferences, dinner events, and food tours to promote sustainable practices. Each guest chef we invite embodies the farm-to-fork philosophy, not by trend, but as a reflection of their values. They set leading examples in health cuisine, circularity, biodiversity, seasonality, traceability, local sourcing, zero waste, sustainable seafood, and ancestral foods.

10 PROOF (PHYSICAL EVIDENCE)

The Ministries of F&B and Digital Economy are integrating KPIs into the national multi-metric system to measure and evaluate the success of the National Sustainable Gastronomy Strategy 2026. Reference to our guest promise outlined in the first course, we will quantify and qualify the four core values. Our progress will be monitored and assessed internally by the National Sustainable Gastronomy Alliance and will undergo external audits by our international partners.

Your Excellency, our national strategy has a central role for sustainable gastronomy at the intersection of Agriculture, Culinary Arts, Heritage, Destination Management, and Responsible Tourism. My Ministry is dedicated to driving this sustainable transformation across communities, economies, and ecosystems.

Yours sincerely,

Nico Dingemans

Minister of Food & Beverage



HY8



AI Advantage: Reimagining Hospitality's Commercial Future

Artificial intelligence

Brian Hicks

*President and CEO, Hospitality Sales & Marketing Association International
(HSMAI)*



Brian Hicks, President and CEO at Hospitality Sales & Marketing Association International (HSMAI), outlines how AI is rapidly moving from experimentation to real impact across hospitality's commercial functions, driving measurable gains in revenue, conversion, and efficiency in revenue management, marketing, sales, and distribution. Drawing on HSMAI research and case studies, he argues that AI fluency has become a core leadership skill and urges hotel executives to adopt AI-first frameworks, upskill their teams, and update KPIs so AI becomes a sustained engine for growth.

AI is reshaping every corner of commercial strategy, and hospitality is now moving from curiosity to real execution. Our Rising Leader Council sees it clearly - more than half cite AI as the single biggest opportunity for 2026. The difference this year is that we finally have meaningful data, practical use cases, and measurable outcomes to learn from.

Drawing on new research from the [HSMAI Foundation](#) and insights from the [Milestone + HSMAI ebook](#), this article explores how AI is already transforming sales, marketing, revenue, and distribution - and what leaders should be prioritizing as we head into 2026.

THE GUEST JOURNEY REIMAGINED

Research by Milestone, outlined in [How AI is Changing the Hospitality Customer Journey](#), predicts that by the end of 2026, 50% of all search traffic will flow through AI-powered engines such as ChatGPT, Google AI Overviews, Perplexity, and Copilot. This shift shortens the discovery process into conversational interactions, skipping traditional search altogether, highlighting the need to prioritize GEO (Generative Engine Optimization) as it quickly replaces SEO.

AI agents can act as digital concierges across the lifecycle, answering property questions, streamlining reservations, and managing loyalty offers. Hotels that embed structured data and conversational content into their digital platforms can gain an edge in AI-driven discovery.

AI'S IMPACT ACROSS COMMERCIAL DISCIPLINES

Hotels leveraging AI-driven RMS report 20–30% revenue improvements and RevPAR gains of up to 10%, alongside cost reductions of up to 15%. AI automates millions of pricing decisions annually, freeing revenue leaders to focus on strategic interpretation and owner-facing advisory roles.

Marketing has great potential to be reshaped by AI. Hyper-personalized campaigns deliver 10–30% higher ROI, while AI-driven content generation accelerates production speed by 50–70%. GEO ensures visibility in AI-powered search results. An outdoor hospitality brand deployed AI-powered website agents to automate guest inquiries and upsell packages. The outcome was a 56% increase in conversion rates and \$574K in cost savings within one year.

In sales, AI amplifies, rather than replaces, human talent. Predictive analytics, lead scoring, and proposal generation allow sales professionals to focus on consultative selling and relationship building.

AI-enabled coaching platforms are transforming leadership development, improving coaching consistency by 50% and reducing leader preparation time by 75%.

In one example highlighted in [The State of Hotel Commercial Talent Report](#), AI-driven sales training helped a hospitality client save \$1M annually by replacing traditional role-play training with virtual AI-driven simulations.

And in distribution, AI-driven schemas and merchandising influence visibility and profitability across OTAs, GDSs, and emerging generative search platforms. Hotels using AI-driven merchandising strategies on OTAs reported 15–25% higher conversion rates and improved contribution margins by dynamically adjusting content and pricing based on real-time demand signals. These results are challenging distribution leaders to master AI to manage contribution margins and optimize channel economics.

LEADING THROUGH TRANSFORMATION

Across commercial functions, AI brings both technological disruption and a leadership mandate. To thrive in 2026, executives must support adoption with organizational alignment, talent development, and thoughtful change management. Priorities include:

1. Adopt AI-First Frameworks – Consolidate fragmented tech stacks into unified platforms that integrate content automation, data analytics, and AI-driven decision engines across sales, marketing, revenue, and distribution.
2. Upskill Teams – AI and automation will reshape at least 25% of hospitality roles. Continuous learning, cross-functional agility, financial literacy, and consultative selling skills are essential.
3. Embed Ethical Governance – Minimize risks such as algorithmic bias and data privacy concerns with proactive safeguards. Psychological safety and transparency must be cultural anchors during digital transformation.
4. Measure What Matters – Traditional metrics like click-through rates are becoming obsolete. AI-era KPIs — including GEO visibility, sentiment analysis, and conversion impact — must connect back to RevPAR, TRevPAR, and flow-through.

Our research underscores a clear reality: AI fluency is now a core leadership competency. The commercial leaders who understand how pricing, personalization, and distribution are being reshaped will be the ones who future-proof their organizations. The next five years will set the trajectory for the next fifty, and the decisions we make today will determine whether we lead this transformation - or react to it.

As we enter 2026, I encourage you to view AI not as a test to endure but as an engine for innovation, differentiation, and growth. Our industry has always excelled at adapting, evolving, and finding opportunities in change. With the right vision and investment, AI will strengthen, not replace, the human experience that defines hospitality. The future is here, and it's ours to shape.



HY8



Sitting at the crossroads of tradition and AI: What lies ahead for hotel stars?

Guest reviews & reputation

Dr. Dimitris Koutoulas

*Principal, Koutoulas Consulting, and Assistant Professor of Tourism and Hotel
Management, University of Patras, Greece*

Koutoulas

Dr. Dimitris Koutoulas, tourism consultant and Assistant Professor of Tourism and Hotel Management, explores what lies ahead for traditional hotel star ratings in an AI-driven world. He explains why official classifications still matter alongside guest reviews, how rigid or outdated criteria can distort hotel development, and how cross-border initiatives like Hotelstars Union point to a more harmonised future.

In an industry defined by constant change, one feature has remained surprisingly stable for decades: the good old hotel stars. I remember that around 15 years ago, when guest-review platforms such as TripAdvisor were becoming increasingly influential, many predicted that official star ratings would soon become obsolete. Then came the “inflationary” pressure from supposedly six-star brands and even hotels that claimed to be worthy of seven stars. Add to that the stance of several major hotel companies, which believe that their highly recognizable and clearly positioned brands render star ratings unnecessary.

Yet hotel stars persist – still firmly anchored within their traditional range of one to five. Even in countries where classification is voluntary, hoteliers continue to see value in paying for receiving an official rating. It is telling that, when given the option to operate without stars, many owners still prefer to provide guests with the assurance that an objective and recognized system stands behind their promise of quality. The market has a very good appreciation of what hotel stars represent and travellers keep relying on these symbols when choosing their accommodation.

The emergence of TripAdvisor & Co. seemed to directly affect the acceptance of official star ratings at that time. However, despite the omnipresence of consumer reviews, most travellers understand that (a) guest feedback is highly subjective – often written by people with an axe to grind or, conversely, by a hotelier’s friends and employees – and (b) that TripAdvisor dots, Google stars or Booking.com scores measure something entirely different from official hotel stars. Review scores indicate how well guest expectations are met, whereas star ratings objectively acknowledge the amenities, services and comfort offered by each property, based on thorough on-site inspections carried out by trained professionals.

Public discussion around hotel stars tends to focus on consumer protection, since ratings provide transparency, ensure minimum quality standards and help travellers understand what to expect. But there is an additional, often overlooked dimension: star rating criteria – especially when classification is mandatory – can shape a country’s hotel sector for years. Hotels need to adhere to requirements such as minimum room sizes, offering function rooms or operating full-service restaurants even when such facilities are not profitable. That’s exactly the point I’ve had the privilege of working on with operators of official classification systems such as national ministries, tourism authorities and hotel associations across three continents while reviewing and updating their star rating criteria. My role was making sure that classification not only reflects current and future guest needs, but also supports hotel profitability and guest satisfaction.

Regularly updating classification standards and procedures is the best way to address frequent complaints that star ratings are outdated.

Removing mandatory requirements for longtime hotel features such as lobbies, room service, minibars or even in-room phones, and acknowledging tech-based solutions such as online check-in and smart TVs are now part of a typical review of a hotel classification system.

An issue also repeatedly mentioned is that classification systems in some countries are too rigid and promote sameness among hotels. These systems cannot easily accommodate the more creative approaches to hospitality. Thus, new projects or refurbishments representing out-of-the-box concepts such as boutique hotels, glamping or repurposed historic buildings are being discouraged or even outright rejected when applying for a star rating or for an operating license.

Another frequent critique is that each country applies its own concepts and criteria, meaning that three-star or four-star hotels can differ significantly across borders. This confusion has prompted calls for harmonization. UN Tourism (formerly UNWTO) has on several occasions started a discussion about a global approach to star ratings, but many experts dismissed the idea at that time, arguing that differences in national hotel markets would prevent a universal system from working.

Such differences should not be underestimated. Just to share a few examples from the national star rating systems I have worked on: Requiring the existence of air-conditioned waiting rooms for taxi drivers in Middle Eastern hotels, who would otherwise suffer waiting in the baking sun; providing dedicated ski storage space within mountain resort hotels for keeping guest rooms clean and uncluttered; or making sure that hotel staff in developing countries has access to shower facilities at work, considering that many homes do not have running water.

Interestingly, while a top-down approach has often been rejected, a bottom-up, industry-led European initiative has proven that a multi-country star rating system can be successfully implemented. The Hotelstars Union (HSU), launched in 2009, unified the national star ratings of Austria, the Czech Republic, Germany, Hungary, the Netherlands, Sweden and Switzerland, which were operated by each country’s hotel association. After gradually expanding to other European countries, HSU now has 21 members including not only national hotel associations representing star ratings that are voluntary for hotels to join, but also ministries or other government agencies operating mandatory hotel classification systems. HSU provides the same set of classification criteria to all its member countries, but also allows for national variations reflecting each country’s situation. Another key feature of HSU is that it regularly reviews its list of criteria ensuring that they reflect the latest developments in the hospitality sector.

Perhaps the time has come to revisit the idea of a truly global hotel classification. With HSU as a highly successful proof-of-concept and several other cross-border cooperation projects underway, a universal star system could reduce traveller confusion, increase transparency and help hotels focus on what guests value now and will value in the near future. Ideally, such a system would maintain consistent core criteria while remaining flexible enough to accommodate distinctive cultural and natural settings of participating countries, from cave dwellings and ice hotels to historic inns and safari lodges.

It should also encourage the industry's inherent creativity as showcased, among others, by boutique hotels and lifestyle concepts.

So what comes next? Hotel classification has always been data-driven. Inspectors have long dealt with extensive checklists, ticking hundreds of boxes and taking lengthy notes during each inspection first on paper and now on tablets. Today, the process is ripe for optimization thanks to the constant flow of guest reviews and the growing power of artificial intelligence.

Many operators already use review-aggregation platforms such as TrustYou, ReviewPro and Revinate to monitor hotel performance. As their AI capabilities expand, these tools are becoming increasingly adept at identifying a hotel's strengths and weaknesses, analyzing trends and predicting emerging issues.

Instead of relying solely on scheduled inspections every two or three years, classification authorities can tap into this continuous stream of crowdsourced data, gaining real-time insight into guest satisfaction. AI tools can automatically flag hotels whose ratings dip below a threshold and trigger earlier inspections. Inspectors can receive detailed, automated briefings highlighting problem areas, allowing their on-site assessments to be more focused and effective. Technology will not only improve accuracy but also empower inspectors to provide actionable guidance to hoteliers on how to enhance both guest satisfaction and to grow their revenue.

In the foreseeable future, I expect that the core value proposition of official star ratings will remain unchanged: providing guests with the assurance that their chosen hotel meets the minimum standards of its category and that these assessments are based on objective, professional on-site evaluations. An additional, if unintended, benefit may be the preservation of certain "old-school" hospitality elements that many guests still appreciate. At a time when traditional features are quickly vanishing from an increasing number of tech-oriented hotels, classification systems can play an important role in safeguarding high-touch hospitality for the next generation of travellers. How? By retaining more traditional elements among points-based classification criteria, such as in-room stationery and writing sets, shoe shining, porter service for luggage delivery or evening turndown. Such flexibility will allow each hotel to freely position itself along the hi-tech/hi-touch continuum in accordance with its chosen concept.

You wouldn't mind a chocolate on your pillow during your next hotel stay, would you?



HY8



Agentic AI: An Inflection Point for Hospitality in 2026

Agentic AI

Wouter Geerts

Director of Market Research, Mews

MEWS

Automation	Automation relies on static, rule-based systems that follow simple logic. If X happens, then do Y. Its power lies in automating repetitive tasks within predefined instructions at scale, saving huge amounts of staff time. Although often labelled as a form of AI, its lack of learning, adaptation and reasoning means there is no artificial intelligence involved.	Hospitality use case When a non-refundable web reservation comes in, the system automatically processes the credit card transaction and sends a receipt to the guest.
Machine learning	Machine learning analyzes data to improve its output over time. It learns patterns and makes predictions, though still requires human direction.	Hospitality use case A revenue management system that tracks live demand, market trends and historical data to automatically set optimal room rates, improving its effectiveness over time.
Generative AI	Generative AI creates new outputs (like text, images or code) based on patterns learned from vast datasets. It's capable of reasoning and producing original responses, but typically needs a human to initiate and guide each action.	Hospitality use case Staff can generate an instant snapshot of any guest with the click of a button, thanks to the synthesis of data including reservation history, housekeeping notes and past preferences.
Agentic AI	Agentic AI goes further. It connects to multiple systems through APIs to set goals, plan and execute tasks autonomously, often collaborating with other systems or agents. Instead of waiting for instructions, it acts proactively within defined parameters to achieve desired outcomes.	Hospitality use case If a guest asks for a towel in a chat tool, the agent will infer the need to involve housekeeping, assign the task to the staff member best positioned to accomplish it, and then inform the guest that a towel is on the way.

Wouter Geerts of Mews argues 2026 is when agentic AI moves from hype to quietly running hotel operations—handling routine tasks, predicting demand, and coordinating systems so staff can focus on meaningful guest interactions. The key enabler: a "semantic layer" unifying real-time data across PMS, CRS, and other hotel systems. Without it, AI can't act effectively.

BEYOND THE HYPE: AI MOVES INTO THE ENGINE ROOM OF HOTELS

For years, the conversation about AI has been dominated by potential. We were asked to imagine what might be possible "one day". Interesting, but comfortably abstract.

That is now changing. AI is no longer just black-box algorithms or only operational in demos and pilots. It's moving into the messy, day-to-day reality of operations, quietly helping determine what work gets done, when, and by whom.

If it feels like the conversation around AI shifted overnight from hype to necessity, there's a reason. In my recent deep dives with hoteliers, technologists, and researchers, one clear theme keeps coming back: agentic AI – the next evolutionary step beyond chatbots and rule-based automation – will start to run the core mechanics of hotels, from invisible back-office processes to those irreplaceable guest moments that define true hospitality. 2026 is the year when that shift becomes visible at scale.

The groundwork is in place; the inflection now is from potential to realization: from talking about AI, to letting it reshape how hotels actually run.

WHY HOTELS ARE GETTING SERIOUS ABOUT AI

Traditionally, hotels have not rushed headfirst into every technology wave. In workshops and interviews, I often hear some version of the same line: *"We'd love to modernize, but right now we just need to get through this week."* Thin margins, complex legacy stacks, and the nonstop demands of daily operations have made it easier to delay big decisions than to rewire how hotels run.

That's changing. Powerful forces like structural labor shortages, rising costs, shifting guest expectations, and the rapid maturity of AI tooling collide with the old ways of working. Generative AI and machine learning – tools that once sounded abstract – are being embedded into core platforms. And agentic AI is knocking on the door, looking to orchestrate tasks across revenue, operations, and the guest journey in real time.

But what does this actually mean for the guest and staff? It's not about robots at the front desk; it's about intelligent systems that quietly strip out friction so teams can spend less time firefighting routine issues, and more time on the interactions with guests that actually build loyalty and long-term value.

4 LEVELS OF INTELLIGENCE

IMPACT ON OPERATIONS: LESS CHORE, MORE STRATEGY

The promise of agentic AI for hotel operations is simple and powerful: reduce manual work, break down silos, and free staff to focus on strategic and high-touch activities. Instead of managers constantly reacting, a system predicts weekend booking surges and automatically adjusts staff schedules, or flags inventory risks before they disrupt service.

AI agents handle the repetitive, behind-the-scenes tasks – invoicing, procurement, task routing, even onboarding – and surface the decisions humans actually need to make.

That level of operational excellence has rarely been achieved consistently. Agentic AI changes that. Any property can run a tighter, more proactive operation, and hotel groups go a step further: insights and optimizations discovered at one location can be shared instantly across the portfolio, turning every property into part of a continuous learning network.

IMPACT ON THE GUEST JOURNEY: SEAMLESS AND PERSONALIZED

When I ask hoteliers what great service looks like, the answers are rarely about technology. They talk about remembering a guest's name, fixing a problem before it turns into a complaint, or surprising someone with exactly what they need after a long journey.

Agentic AI's role is to make more of those moments possible. It transforms the guest experience from transactional to anticipatory. Instead of aiming for “just enough” service, hotels can now deliver personalized journeys, enhanced by real-time context and historical preference. Agents help staff recognize returning guests, recall nuanced preferences (from allergies to room location and pillow type), and automate logistics – while people focus on the kind of authentic hospitality no machine can replicate.

Hoteliers should be able to decide how far to take this. Select-service hotels will lean more on visible automation and frictionless digital check-in, giving guests control and speed. Luxury properties let agentic AI work mostly in the background, quietly coordinating preferences and operations, so human staff have more time for unscripted, high-touch moments. The common thread is that every guest feels known, and every team member is empowered to focus on empathy and creativity, not admin.

THE MISSING FOUNDATION: THE SEMANTIC LAYER

If I had to nominate a “word of the year” for hospitality technology in 2026, it would be the semantic layer. This layer will be of growing importance for hotels. It's not a nice-to-have; it's the essential foundation for effective AI, particularly agentic AI, because it allows machines and humans to interact with data in a meaningful way.

For most hotels today, the tech stack is a patchwork of disconnected systems, duplicated data inputs, and brittle integrations. Agentic AI demands a reimagining of this architecture. To be effective, it must orchestrate tasks across all systems in real time – adjusting rates, managing housekeeping schedules, triggering maintenance, personalizing communications – based on a single, trusted, up-to-date view of what is happening in the hotel.

This is where the semantic layer comes in. It sits above fragmented tech stacks and translates raw, messy data from every source – PMS, CRS, RMS, guest messaging, payments – into a universal language that AI can understand and act upon. It understands your hotel and its quirks, and knows what data to pull when.

Hotels that invest in robust, connected systems are effectively laying the groundwork for this semantic layer. Put simply, a core system that cannot feed and receive clean, real-time data into a semantic layer stops being an asset and starts becoming a structural risk.

At Mews we have acquired [DataChat](#) to deepen our expertise in building this semantic layer for hotels. This will allow us to move faster into deploying operational AI agents that communicate across all hotel systems, so users can consistently deliver standout service and run leaner, more intelligent operations. Our vision is that hotels using Mews (or a similarly open, AI-ready stack) will be the most visible and competitive on tomorrow's digital platforms, and among the most efficient in daily operations.

If you want to dive deeper into this topic, download our [Agentic AI for Hotels](#) whitepaper.

WHERE TO START: A CHECKLIST FOR HOTELIERS

Talking about implementing AI is easier than actually doing it. This is a common problem I see: hoteliers get excited when I talk about this vision, but don't know how to actually start. Well, here you go. Use this practical, future-proof checklist as your first roadmap:

MAP YOUR DATA FLOWS

List and diagram every system – PMS, booking engine, channel manager, guest communications, housekeeping, F&B, payments. Identify gaps, silos, and points of duplicated effort.

STANDARDIZE YOUR DATA

Build a shared vocabulary for rates, inventory, guest attributes, and services. This not only improves your hotel's discoverability by generative AI search tools, it also lays the groundwork for a reliable semantic layer.

PILOT TARGETED AUTOMATIONS

Pick a single, high-friction task – for example dynamic staffing schedules or automated upsell campaigns – and automate it with clear oversight and KPIs. There are many tools that let you build and test agents. Start small, but start.

TRAIN FOR HUMAN-AI COLLABORATION

Bring staff into your experiments early. Show them where AI agents can take over routine work, and where human judgment is essential. Technology should enhance – not replace – the human touch.

GOVERN WITH TRANSPARENCY

If you want to take it further, create a small governance group to set clear policies for AI oversight, data security, and guest privacy. Decide in advance which decisions AI can suggest, which it can execute, and which always need human approval.

REVIEW AND ITERATE

Regularly measure outcomes – guest satisfaction, staff efficiency, revenue optimization – and refine your roadmap based on results.

Download our [2026 Hospitality Industry Outlook](#) report for more detailed checklists, expert opinions, and case studies.

CLOSING: HUMAN-FIRST, POWERED BY AGENTIC AI

Agentic AI will not replace the essence of hospitality – it will bring it into sharper focus. The hotels that thrive in 2026 and beyond will be those that use technology to empower people, not to automate them away.

The real winners will be the ones investing in connected systems today, because only then can AI agents make a real difference. Those hotels will become the places guests want to stay – and the places staff want to work.



HY8



AI Agents in Hospitality: Driving Innovation, Well- Being, and Personalization

AI in hospitality

EHL Research
EHL Research Team



The EHL Research Team outlines how AI is shifting from hype to practical tool in hospitality, with most professionals expecting a major impact on guest communications, personalization, and operations by 2026. Current adoption is still limited and focused on easier, guest-facing use cases, but early results show clear gains in time savings, efficiency, decision speed, and revenue – provided AI is integrated into a broader digital strategy and used to empower, not replace, staff.

Artificial intelligence (AI) is everywhere nowadays. There is no conference or expert talk where AI does not take center stage. In the hospitality industry, the use of AI tools is gaining importance and gradually becoming a practical resource that, if used correctly, can support staff, improve operations, and enhance the well-being of both employees and guests.

The success of these tools depends not only on thorough staff training and integration into operational ecosystems but also on a clear intention: to use AI to empower employees rather than replace them.

By taking this approach, the hospitality industry can harness AI-driven systems to reduce operational strain, free up staff for meaningful guest interactions, and create more resilient workplaces where people thrive – ultimately improving the guest experience.

The impact of AI on hospitality is already evident, even if widespread implementation is still developing. A survey of 327 hospitality professionals worldwide by [Canary Technologies on AI in Hospitality](#) found that 73% think AI will have a big impact on the industry. Some 61% of hoteliers said that AI is impacting the industry now or will within the next year, while 39% think it will impact hospitality in two or more years. Over 80% believe AI will significantly reshape pre-booking interactions and guest communications, enabling more personalized, seamless connections with customers.

Guests are also growing increasingly familiar with AI and are encountering more tools designed to enhance their travel experiences. According to the June 2025 [Skift US Travel Tracker Survey](#), which gathered responses from over 1,000 US travelers, more than half are using AI-based tools for travel planning.

In a survey of 86 primarily US-based travel executives, cited in the 2025 report [Remapping Travel with Agentic AI](#) from McKinsey & Company and Skift Research, 26% of respondents indicated that implementing AI reduced their operational costs, 30% said it sped up decision-making, and 33% reported improved customer personalization. In addition, 36% observed higher-quality outputs and 59% noted increased employee productivity. Overall, a majority of participants stated that AI adoption over the past three years had contributed to more than 6% annual revenue growth and the same percentage in annual cost savings.

AI IMPLEMENTATION IN HOSPITALITY STILL LIMITED

While the potential of AI in hospitality is significant, adoption remains relatively limited.

A 2025 survey of 170 European hospitality businesses conducted by [HES-SO Valais](#) found that most AI applications in use today focus on real-time revenue management (42%), guest personalization (38%), and predictive analytics (37%). The analysis shows that most hotels currently focus on guest-facing tools that are easy to implement.

Among hotels already using AI, perceptions are notably positive. On a 1-10 scale, the average rating of AI's benefits by survey respondents was 6.6, with a median of 7. Nearly one in four hotels (23%) rated the benefits as 8 out of 10, and 14% gave the highest score. Only 5% reported seeing no benefit at all. Time savings (76%), improved communication (54%), and enhanced operational efficiency (51%) were most frequently mentioned as advantages.

On the other hand, challenges include high implementation costs, technical complexity, and lack of technical skills. Data privacy issues and integration challenges are also significant, particularly for larger hotels with complex legacy systems. Research shows that AI is most effective when integrated into a broader digital strategy aligned with business goals, guest experience, and operational needs, which leads to enhanced efficiency without replacing the human touch that defines hospitality.

“In practice, this can look like using AI to optimize processes such as dynamic pricing or demand forecasting, but not to eliminate staff roles,” says EHL Professor and tech expert **Ian Millar**. Instead, it should be used to complement human skills, providing staff with better tools, information, and support. *“The lesson so far: AI can increase efficiency – but without reliable integration, careful training, and a focus on the needs of people, its impact and purpose remain limited,”* Millar adds.

HOW AI CAN ENHANCE EMPLOYEE WELL-BEING

Beyond efficiency, AI can improve staff well-being – a growing priority in an industry associated with long hours, high turnover, and stress. EHL Professor **Dr. Reza Etemad-Sajadi**, an expert on human-machine interaction, explains that AI can function as a “buffer” against burnout and workload imbalance. Predictive scheduling can anticipate peak stress periods and allocate staff effectively, while AI analytics can identify patterns of overworking or absenteeism, enabling proactive management.

AI can also support mental health by reducing repetitive tasks and enabling more balanced workloads. *“When employees feel less overwhelmed by administrative burdens, they are better able to focus on the creative, social, and service-oriented aspects of their roles. These are factors strongly linked to job satisfaction,”* says Dr. Etemad-Sajadi.

Importantly, he emphasizes that AI must be implemented responsibly, with safeguards for privacy, data security and ethical considerations. *“Used well, AI doesn’t just boost productivity, but can actively contribute to healthier, more sustainable workplaces.”*

This dimension is particularly important as younger generations of workers increasingly look for employers who care about well-being and purpose. *“In a competitive labor market, companies that use AI to create less stressful, more supportive environments may find themselves better positioned to attract and retain talent,”* says Dr. Etemad-Sajadi.

AI TOOLS SHOULD EMPOWER EMPLOYEES, NOT REPLACE THEM

Another advantage of AI tools is their ability to help staff manage problems that arise from increasing digitalization. A recent research project led by **Dr. Jie Yu Kerguignas** at EHL and funded by HES-SO explores how the digitalization of services affects frontline employees' productivity. Drawing on a panel of 262 hospitality professionals and interviews with 10 hotel experts, the study found that system failures, complexity, and insufficient training undermine productivity and service quality.

Connectivity breakdowns, outdated software, and high training costs increase employee stress and can lead to guest dissatisfaction. *“Hotel managers agree that technology is essential to modern operations, yet its shortcomings can quickly paralyze service delivery,”* says Dr. Yu Kerguignas.

Hotel managers consistently emphasize that technology is essential but must be reliable and aligned with operational needs. *“Software that appears intuitive to IT experts can feel confusing and illogical for hospitality staff,”* says **Denis Wang**, Administrator of Hôtel Beau Rivage Neuchâtel.

High investment in technology without guaranteed reliability can backfire, increasing stress rather than alleviating it. *“This reflects a growing managerial concern: technology is indispensable, but only when it is both reliable and aligned with operational needs,”* emphasizes Dr. Yu Kerguignas.

AI AS A STRATEGIC ALLY

Against this backdrop, subsequent research by **Dr. Jie Yu Kerguignas** reveals that most managers regard AI as a strategic ally, helping staff to manage technology and overcome problems associated with it. *“Today, AI enables greater personalization while also supporting staff – not to replace them, but to enhance their performance,”* says General Manager of the Chalet RoyAlp Hôtel & Spa **Egbert Buursink**. Instead of removing jobs, AI can be used to predict system failures, reduce repetitive tasks, and serve as a digital assistant.

According to this study, the consensus among managers is that AI should operate quietly in the background, strengthening operations and boosting staff confidence while preserving the essential human element of hospitality. *“The human being is at the heart of the matter. We must think about the benefit for the person,”* says **Nicolas Messian**, Vice-President of Operations at Corner Collection.

To conclude, Dr. Jie Yu Kerguignas notes: *“The study clearly shows that hotel leaders are not afraid of AI. On the contrary, they are eager to experiment with tools that empower employees. The greatest demand is for AI solutions that increase productivity by predicting failures, simplifying workflows, and analyzing repetitive errors. And secondly, tools that support training and confidence through AI coaches, chatbots, and on-demand guidance.”*

It is also important to consider security, data protection, and cross-jurisdiction regulatory requirements, which remain major concerns for hotel groups and make AI adoption dependent on strong safeguards and increased compliance costs.

THE RISE OF AI AGENTS

Looking ahead, one of the most transformative innovations is the development of AI agents, whether in hospitality, healthcare, finance, or many other industries. In an [interview](#) in February 2025, Microsoft CEO Satya Nadella said that AI agents will reshape the landscape of Software as a Service (SaaS) businesses. These agents act as the primary interface between people and technology, responding to questions, executing tasks, retaining memory across interactions, and reshaping both enterprise and consumer computing.

In hospitality, AI agents are particularly relevant, representing the next step beyond traditional AI and Generative AI (GenAI). AI agents can enhance guest experiences, streamline operations, and support data-driven decision-making. For example, by analyzing competitor pricing and market demand, AI agents can dynamically adjust room rates to optimize revenue and occupancy.

In a recent [interview](#), **Jeanelle Johnson**, PwC's travel, transportation and hospitality expert, said: *“These are autonomous tools that make decisions in real time, whether that's curating a personalized guest offer or resolving an operational issue.”*

AGENTIC AI IN PRACTICE

The report [Remapping Travel with Agentic AI](#) from McKinsey & Company and Skift Research identified several ways in which agentic AI can significantly enhance hotel operations and property management by autonomously handling complex, real-time decisions:

- **Guest room allocation:** Automatic assignment based on guest preferences, loyalty, and past feedback, saving 30 minutes to 2 hours per day for front-office staff.
- **Predictive maintenance:** Anticipates issues, manages repairs, and orders parts autonomously, reducing rooms' out-of-service time by 20-30%.
- **Housekeeping management:** Dynamically assigns tasks using real-time data, reducing hours by 10-30% and optimizing workflow.
- **Menu engineering:** Analyzes offerings, pricing, and inventory, increasing net profit by 5-15%.

Unlike traditional chatbots, AI agents are proactive and capable of natural language interaction, system integration, and complex task execution. **Florian Montag**, EHL alumnus and VP at Apaleo, explains: *“They anticipate needs, offer solutions, and adapt to context, reducing interruptions and letting staff focus on high-value interactions that define hospitality.”*

For hotels facing labor shortages, AI agents help maintain service quality, reduce staff pressure, and preserve organizational knowledge, which is increasingly valuable in a sector with high turnover. Hospitality tech expert Montag says that this is not about “robots replacing people” but about creating a collaborative dynamic where digital assistants handle routine complexity autonomously, freeing human employees to do what they do best: provide genuine hospitality.

EHL IAB-Member, investor and former CEO of Booking.com **Gillian Tans** sees AI agents as a game changer for the travel industry. *“Generative AI will reshape travel by creating seamless, personalized journeys that anticipate traveler needs and remove friction. For hotels, it means transforming operations – from smarter demand forecasting to hyper-personalized guest experiences – unlocking new levels of efficiency and loyalty.”*



Already today, agents make exploring destinations and planning activities simple and inspiring; the next leap is AI agents seamlessly moving from inspiration to action – such as booking your entire trip for you.

◆ **Gillian Tans**, EHL IAB-Member, investor and former CEO of Booking.com

The rise of AI in hospitality demonstrates that technology can empower rather than replace human staff. AI agents can handle repetitive, data-driven, and complex tasks, allowing employees to focus on human-centricity and meaningful interactions. When implemented with careful training, integration, and ethical safeguards, AI becomes a tool to enhance workplace well-being, increase efficiency, and improve guest satisfaction, showing that a people-first approach and technological innovation can coexist, paving the way for a brighter future for our industry.



HY8



Fixing Hotels' Biggest Sustainability Blind Spot: Waste

Waste management

Greg M. Poirier

MBA, Global Director, Hospitality Certification Programs, Audubon International



Greg Poirier, Global Director, Hospitality Certification Programs at Audubon International, highlights that, unlike energy and water, hotel waste is still poorly measured and managed, making it a major sustainability blind spot. He argues that real progress depends on circular procurement (designing out waste from the start) and standardized tracking using tools like HWMM and tech platforms to automate data, improve diversion, cut methane and PFAS risks, and reduce hauling costs.

Hotels have started making major progress on sustainability over the past decade. Energy efficiency and water conservation are now more standard practice, from LED retrofits to low-flow fixtures and advanced HVAC systems. Yet one of the industry's biggest sustainability challenges remains stuck in the shadows: waste.

Unlike energy and water, which benefit from smart meters, utility portals, and early-stage standardized ESG reporting, hotel waste management is fragmented and poorly tracked. Trash leaves the loading dock and, for most properties, disappears into a black hole of inconsistent data, unreliable hauler reports, and mounting climate liabilities.

At Audubon International, our Hospitality Certification programs use up-to-date scientific standards for evaluating the efforts of hotels and resorts. These primary areas of focus include communication, community, energy, water, waste, chemicals, and indoor air quality. We require benchmarking data wherever possible—and when not available, the best verifiable estimates. Without baseline metrics, there is no reliable path to measurable impact. Waste consistently has the lowest-quality data and reporting, which is a growing concern.

WHY WASTE STILL LAGS BEHIND

Hotels globally face unique challenges in managing their waste footprint. In Puerto Rico, infrastructure is inconsistent between communities, and across the Caribbean, landfill options are weak or nearing capacity. Even in the U.S., more than 140,000 jurisdictions govern landfills alongside thousands of private haulers, making consistency nearly impossible.

Even within the same brand or management company, waste reporting varies dramatically due to:

- Manual data entry that is slow, inconsistent, and error-prone
- Lack of universal terminology
- Different reporting rules across jurisdictions
- Small haulers with limited IT infrastructure
- Weak verification and limited auditability

As a result, while energy and water reporting continue to mature, waste data is often anecdotal, incomplete, or unverifiable. That gap undermines environmental progress and erodes ESG reporting credibility.

THE MISSING LINK: WASTE AND THE CIRCULAR ECONOMY

A major reason waste remains an afterthought is that many hotels still operate within a linear procurement model—take, use, dispose. But waste cannot be solved at the loading dock; it must be addressed at the purchasing stage, long before materials reach the guestroom or kitchen.

A circular economy approach flips the model. It emphasizes eliminating waste at the source, keeping materials in use longer, and designing products and purchasing systems that minimize environmental impact across their full life cycle.

For hotels, this means procurement teams must:

- Prioritize durable, repairable, and reusable goods
- Vet suppliers for recyclability, composability, and PFAS-free materials
- Reduce unnecessary packaging
- Choose products with verified end-of-life pathways
- Align purchasing decisions with diversion goals

When procurement and waste management operate independently, hotels unintentionally create waste streams they are not equipped to manage. When the two functions are integrated, circular principles begin to drive operations — reducing both volume and cost.

A STEP FORWARD: STANDARDIZING WASTE DATA

The Sustainable Hospitality Alliance, working with Greenview and WWF, developed the Hotel Waste Measurement Methodology (HWMM) to bring consistency to waste reporting. HWMM provides a standardized way to define waste streams, calculate diversion rates, and set reduction goals across regions and property types.

TURNING METHODOLOGY INTO ACTION

Technology platforms such as Z3 Data are helping hotels operationalize HWMM by automating and centralizing waste reporting. Key capabilities include:

- Automated invoice processing
- Portfolio-wide visibility
- Analytics for diversion, emissions, and cost anomalies
- Integration with ESG frameworks
- Auditable records for verification

With analytics in place, inefficiencies become opportunities. One hotel reduced hauling fees by 60% by optimizing compactor schedules.

THE BIGGER PICTURE: WHY IT MATTERS

Even with better tracking, larger environmental and business risks associated with waste persist:

1. Methane – Food waste is a major methane driver, making organics diversion essential.
2. PFAS – Landfills are sinks for PFAS, which migrate into leachate and gas.
3. Hidden Costs – Low landfill fees mask long-term environmental and financial liabilities.

WHAT HOTELS CAN DO NOW

- Make food waste diversion a core climate strategy
- Adopt standardized tracking using HWMM
- Leverage technology to automate reporting
- Align procurement with circularity
- Use data insights to reduce hauling costs and improve diversion

THE BOTTOM LINE

Waste has long been hospitality's forgotten metric, hidden behind the loading dock. But that blind spot is no longer sustainable. With climate impacts mounting and investor scrutiny increasing, waste must be treated with the same rigor as energy and water.

Circularity is the next frontier, and procurement must sit at the heart of it. Fixing the waste blind spot isn't just good sustainability—it's good business.



HYB



Regenerative Hospitality: Embedding People, Place, and Planet

Regenerative hospitality

EHL Research
EHL Research Team



*The EHL Research Team argues that hospitality must move beyond “doing less harm” toward regenerative hospitality, where hotels actively restore ecosystems, strengthen communities, and create net-positive impact. Using their *Regenerative Hospitality Canva* playbook, they show how place intelligence (local nature and community) and people intelligence (transformative guest–host interactions) can turn regeneration into a viable business model, not just a philosophy.*

Sustainability has long been an important issue for the hospitality industry. Environmental initiatives, regulations to reduce greenhouse gases, and increasingly scarce resources such as water have provoked a rethink among businesses, guests, and consumers alike. Consumer interest in eco-tourism, sustainable practices, and green travel has grown, while such options have also become more accessible and affordable. A study from the Business & Economics School ISG in Portugal shows that hotels that are perceived as more sustainable enjoy higher guest loyalty, while a study from the [Northeastern Agricultural and Resource Economics Association](#) finds that consumers are even willing to pay a surcharge (~6%) on restaurant bills for carbon emission reduction programs.

However, whereas for many years striving for a net-zero impact has been the guiding principle in the industry, a growing body of research and practice suggests that “doing less harm” is no longer enough. In fact, studies now show that guests increasingly expect *more* than sustainability.

Enter **regenerative hospitality**, a mindset shift from **net-zero** to **net-positive**, which aims to actively restore ecosystems, strengthen communities, and create net-positive outcomes **for people and places**.

Where sustainability measures success by what is reduced or avoided – less carbon, less water, less waste – regeneration, in contrast, focuses on what is given back. Not only that, but at its core, regenerative hospitality applies the logic of **interconnected living systems**: the idea that everything around us can be understood as part of a living system – whether, social, relational, economic or ecological – and that all these different systems are deeply interconnected, meaning that a change in any given system (i.e. the social system) will have an effect on another (i.e. the ecological system). A hotel, for example, is not an isolated business, but is connected to its surroundings, the natural landscape, local food producers, cultural traditions, and the well-being of guests, staff and community.

As EHL Professor **Dr. Alessandro Inversini**, co-author of the study [The Rise of Regenerative Hospitality](#), explains, “regenerative economics starts from interconnectedness. Hotels are not single entities; they are embedded in a community and an environment. Regeneration is about making that connection visible, tangible, and positive for all.”

Another recent study from the Stenden University of Applied Sciences, [Assessment of Regenerative Hospitality](#), identifies seven pillars – regenerative mindset, interconnectedness, place integration, localized impact, well-being, co-creation, and dynamism – as potential drivers of regenerative hospitality.

For some hotels, a regenerative practice could mean developing an ecological restoration program: replanting mangroves, supporting biodiversity, or rewilding land. For others, it could mean social regeneration: creating spaces where local artists can perform, providing training for local groups, or hosting innovation hubs that connect residents. In both cases, the aim is not just to offset harm but to create tangible new value.

PEOPLE AND PLACE INTELLIGENCE AT THE CORE

Sustainability efforts often focus on environmental concerns and sometimes tend to overlook broader systemic issues such as social inequality, economic structures, and cultural dynamics. Sustainability claims are often prone to greenwashing. The scale of today's global crises, such as climate change, systemic injustice, and geopolitical instability, demands more than localized, incremental solutions – it calls for a coordinated, systemic and structural transformation.

Responding to this need, EHL Hospitality Business School, together with the Swiss university HES-SO Valais, has developed the *Regenerative Hospitality Canva: A Transformative Playbook* to help hoteliers move from net-zero to net-positive and create lasting value for both communities and guests. Developed with key industry partners, the playbook provides hotel managers with a clear methodology to identify net-positive contributions and turn them into concrete actions.

The playbook draws on the two core concepts of regenerative hospitality: the **regenerative mindshift**, which cultivates leaders' awareness of their ecological and social responsibilities, and the **ecosystem approach**, which integrates natural environments and human relationships to drive transformation.

Key elements of this model include **place intelligence**, which addresses the social and natural ecosystems of a location, and **people intelligence**, which focuses on transformative host-guest interactions. This holistic approach is applicable to hospitality businesses of all sizes and types, showing that regeneration is not just an ideal but a financially viable, strategically designed and purpose-driven business model that can lead to long-term, positive impacts.

*“Regenerative hospitality embodies a broader responsibility towards the reality and ecosystems, which is both **place-based** and **people-centered**,”* explains Dr. Inversini, who spearheaded the research and has written a book about the subject, *Regenerative Hospitality, Strategies for Transformative Hospitality Leaders*, edited by Edgar Elgar Publishing.

WHY REGENERATION MATTERS FOR HOSPITALITY

Hospitality is uniquely positioned to lead this shift because of its dependence on both **people** and **place**. Unlike other industries, hotels and resorts cannot “outsource” their environment: a beachfront property is inseparable from the health of its coastline; a mountain lodge from the surrounding ecosystem; a city hotel from its neighborhood's social fabric.

Regeneration can offer operational resilience, prompting hotels to reconsider supply chains, community relations, and environmental dependencies. These shifts can reduce risk, differentiate brands, and open new sources of value that go beyond cost control.

Many concrete examples of regenerative practices in hospitality and tourism have already emerged. For example, the eco-luxury resort Playa Viva in Mexico restores coastal ecosystems and invests in local health and education, the Fogo Island Inn in Canada blends ecological stewardship with guest engagement, and the Brazilian Ibiti Projeto, which was a keynote speaker on regenerative economies at the 2025 [EHL Open Innovation Summit](#), has transformed degraded areas into a 6,000-hectare biodiversity refuge and reintroduced native species into the ecosystem.

In Switzerland, the *Regenerative Hospitality Canva: A Transformative Playbook* has been tested with key industry players including Geneva Marriott Hotel, Hilton Geneva, Six Senses Crans Montana, and Hôtel des Horlogers, each adapting regenerative practices to their unique local contexts and testing out the practicality and adaptability of the approach.



For us, regenerative hospitality goes beyond sustainability. It is about actively creating a positive impact on our environment, our community, and our guests' well-being. At Geneva Marriott Hotel, this means rethinking hospitality in a way that restores, nurtures, and regenerates the ecosystem we are part of, while ensuring a meaningful and responsible guest experience.

Pierre-Henri Perrin, General Manager of Geneva Marriott Hotel

The hotel has implemented several initiatives, including local sourcing and partnerships with regional producers to support surrounding communities and short supply chains, waste reduction programs, and collaborations with impactful locals who share the same vision for a more responsible future. “We believe regenerative hospitality will become a defining pillar of the hospitality industry,” adds Perrin. “Guests will increasingly expect hotels not only to minimize harm but to actively regenerate local ecosystems and communities. In the future, this will translate into deeper collaborations with local producers, more transparent measurement of impact, and the integration of wellness, culture, and nature into the essence of the guest journey.”

Other pioneers include the Six Senses in Crans Montana, where wellness and regenerative design have been at the core of the brand since its establishment in 1995. “Regenerative hospitality is an ambitious journey, not a destination,” says **Dominic Paul Dubois**, Sustainability Director of Six Senses Crans Montana.

Long committed to sustainable practices and eco-responsible standards, the Hôtel des Horlogers in the Vallée de Joux has also embraced regeneration as part of its identity.

“Regeneration is embedded in our hotel's DNA. Just like the watchmakers in the region, we do more than we say. The process is complete and holistic. It forces you to think about aspects that otherwise would not have been considered,” says **André Cheminade**, General Manager at Hôtel des Horlogers.

To further its understanding of the subject, EHL is currently leading a research project in rural Lebanon, together with the Nature Conservation Centre of the American University of Beirut, to better comprehend the role of regenerative hospitality and the use of digital technologies to support natural and social systems regeneration.

THE PATH FORWARD

While regenerative hospitality is still in its early stages, some hoteliers remain cautious. The lack of standardized metrics makes measurement difficult. Several industry and standard-setting bodies – including the [Global Sustainable Tourism Council \(GSTC\)](#), [UNESCO's Travel Pledge](#), [World Sustainable Hospitality Alliance](#) or the [Forbes Travel Guide](#) – are now developing clearer frameworks and best practices to ensure sustainability claims become more verifiable. While there are not yet strictly defined metrics for regeneration, many experts agree that real impact is measured at the level of community ecosystems, for example through community well-being, nature restoration, or local culture preservation.

As Professor Dr. Inversini says, “Regeneration is not a recipe – it is a process of listening, trying, failing, and learning. Regenerative professionals do not intend to introduce new regenerative metrics or propose specific measurements or scales. There are no checklists to adhere to; there are no standards whatsoever. Rather, the impact of regeneration is visible by the hotel staff and their guests, because regeneration is systemic yet local, and its ripple effect can be seen in the restoration, enhancement and co-evolution of the local ecosystems.”

Another challenge is the contextual nature of regeneration, which means that no two approaches look the same. What works for a city business hotel may not translate to a mountain lodge. Yet these very challenges open space for innovation. By moving beyond top-down prescriptions and instead engaging with local needs, regenerative hospitality can avoid the pitfalls of one-size-fits-all approaches.

Vivian Wei Zhou, EHL International Advisory Board (IAB) Member and Vice President of the tourism and hospitality company Jin Jiang International in Shanghai, believes in the potential of regenerative economics and its importance for the future of humanity. “I believe the approach of regenerative economics goes beyond sustainability, as it reminds us how we should cherish the Earth and all the resources it gives us. However, it's important to make it applicable to profit-oriented businesses and to take a collaborative approach,” she adds. “It requires coordination from all the stakeholders as it is a joint effort, taking into account the technological dimension, the business dimension, as well as policies and cross border compliance.”

It is also important to emphasize that regenerative hospitality should not be viewed as a new sustainability standard or a substitute for sustainable practices. Rather, it should be approached as an additional way to align more closely with nature, community and humanity as a whole. *“Regenerative hospitality should not be considered a replacement for sustainability, but a paradigm shift,”* explains Dr. Inversini.

At its heart, regenerative hospitality is about people and place – about creating thriving communities, resilient ecosystems, and experiences that enrich both guests and hosts. By aligning business success with ecological and social regeneration, the hospitality industry can create a multi-dimensional, long-term, positive impact.



HY8



The Future of Food: From Sustainability in Foodservice to Tech Innovations in Food Production

Food tech & innovation

EHL Research
EHL Research Team



The EHL Research Team explores how food has evolved into a powerful lever for health, identity, and planetary well-being, with hospitality uniquely positioned to drive this shift through sourcing, menu design, and guest experience. Drawing on new research, they show how foodservice businesses can move from incremental sustainability toward system-level change, reconnecting people with how food is produced while using technology (from advanced cooking to blockchain) to boost transparency, efficiency, and trust.

Food is no longer just about nourishment, but has become a reflection of how we live, what we value, and where we are headed as a society. It is what connects us, sustains us, nourishes us, builds communities, keeps traditions alive and shapes our cultural identity. With so many trends emerging when it comes to gastronomy, nutrition, and well-being, the food industry is constantly transforming and reshaping itself. From health concerns to sustainability initiatives, from technological innovation to cultural identity, the way we produce, prepare, and consume food is undergoing profound changes.

The EHL [Food & Well-Being 2025](#) report explored food as a multidimensional lever for well-being that goes beyond nourishment and engages health, purpose, culture, and planetary integrity. It explored key developments like the rise of the conscious consumer, the union of convenience and personalization, and the notion of co-responsibility across the food ecosystem.

It also showed that the hospitality industry is uniquely positioned to drive this shift, because foodservice touches so many lives every day. Hotels and restaurants can influence sourcing, design more health-conscious menus, promote social dining practices, and foster transparency and innovation in their operations. In doing so, they can support consumers' desire for food that is not just satisfying, but meaningful, regenerative, and aligned with both personal and planetary well-being.

SUSTAINABILITY IN THE FOODSERVICE INDUSTRY

The foodservice industry is playing a particularly pivotal role in this movement, notably by balancing rising sustainability expectations with the need to remain profitable and adaptable. A recent study from EHL, [Sustainability Transitions in the Swiss Foodservice: Re-imagining foodservice for a world never imagined \(STRest\)](#), examines how Swiss foodservice businesses are addressing this challenge by moving beyond incremental improvements toward fundamental reinvention.

Focusing on sustainability transitions and sustainable business model innovations, the project surveyed over 500 restaurants, hotels, caterers, and cafés on practices, barriers, and enablers across sourcing, waste, energy, and digitalization. The full results will be published and distributed globally through EHL's communications channels to industry, policymakers, and the wider public.

The research highlights the significant potential of foodservice businesses to drive systemic change across the food value chain, given their central role in shaping consumer habits, reducing food waste, and influencing sourcing practices. By combining ST theory with sustainable business model innovation (SBMI), the study explores how the sector can move toward more resilient and environmentally responsible practices.

The findings emphasize that small foodservice enterprises can adopt sustainability innovations ranging from waste reduction and circular practices (such as composting and closed-loop supply chains) to digital solutions for energy and resource efficiency. *"Our findings show that sustainability innovations cut environmental impact and strengthen competitiveness, opening new revenue streams, improving efficiency, and winning sustainability-minded customers,"* says EHL Professor and author of the study **Dr. Carlos Martin-Rios**. *"To turn pilot schemes into everyday practice, businesses need three practical enablers: small-ticket finance for kitchen retrofits, procurement rules that reward waste and energy cuts, and supplier agreements for take-back and data-sharing,"* he adds.

For the industry, the key conclusion is clear: sustainability will become an increasingly decisive factor in business success. While the adoption of sustainable practices can be complex for smaller players, their role is vital for achieving broader climate and food system goals. *"The study underscores the need for a balance between immediate operational needs and long-term environmental objectives, positioning sustainability not only as a moral imperative but also as a driver of competitiveness and resilience in the evolving foodservice landscape,"* says Dr. Martin-Rios.

He also emphasizes that food sustainability must move beyond being an elitist concept. *"Sustainability should be widely accessible and affordable, not confined to premium segments,"* he says. *"Real progress happens when mainstream, high-volume operators build it into core operations, not as a niche add-on. When a chain-scale operator improves, impact multiplies across millions of meals. Fine dining, meanwhile, pilots ideas and shapes norms. We need both the scale and the spark."*

RECONNECTING PEOPLE WITH HOW THEIR FOOD IS PRODUCED

Within the sustainability considerations, significant changes are also underway in how it is produced. Over the past four decades, consumers in industrialized countries have become increasingly detached from the origins of what they eat. Most food today is industrially manufactured, with numerous intermediaries standing between production and consumption. While industrialization has brought many benefits, such as improved life expectancy and reliable access to three meals a day, it has also created distance – both physical and psychological – between people and their food. Consequently, many feel a growing need to reconnect with food production. This desire for reconnection also reflects an increasing longing for authenticity, transparency, and more sustainable practices.

The conversation around production also highlights the growing rejection of processed foods: consumers are moving away from overly processed, industrial products and toward healthier, more authentic, cleaner, and sustainable options, as a report from the [Global Wellness Institute](#) shows. While the rise of plant-based foods remains important, demand is declining for heavily engineered alternatives packed with additives, sugar, or artificial flavors. Instead, there is increasing interest in functional foods, fermentation, and cooking methods that preserve both nutrients and taste.

With this in mind, the EHL Institute of Nutrition Research & Development has made it its mission to create delicious, sustainable, and nutritious food and beverage products. *“We see that there are a lot of challenges in the current food system, and by leveraging our unique EHL expertise and know-how on gastronomy and business, we are helping to develop products that are healthy, sustainable, and tasty,”* says **Dr. Inès Blal**, EHL Professor and Co-director of the Institute for Nutrition R&D.

Together with industry partners, scientists, experts, and chefs, the institute works to reduce additives, replace artificial ingredients, and use advanced cooking and preservation methods, innovative techniques such as precise-temperature cooking, and processes that extend shelf life without chemical preservatives. *“Our approach really shows how cross-disciplinary research can deliver healthier, more natural products that still meet the needs of today’s markets,”* says Dr. Inès Blal.

HOW TECHNOLOGY IS TRANSFORMING FOOD PRODUCTION

Another successful result of cross-disciplinary research is the RoboCake project. Along with scientists from EPFL (the Swiss Federal Institute of Technology in Lausanne) and the Istituto Italiano di Tecnologia (IIT-Italian Institute of Technology), EHL pastry chefs and food scientists have created an edible robotic cake. *“Though it’s not a mainstream product, in the future edible robots could be used to deliver medicines in innovative ways to people who have difficulty swallowing or to deliver food to endangered areas,”* explains **Antonin Soussan**, EHL Lecturer and Project Manager of the EHL Institute for Nutrition R&D.

RoboCake is just one – albeit niche – example of how advancements in technology are significantly transforming food production. Another is blockchain, which is proving particularly useful for quality control and traceability. *“Blockchain technology offers enhanced transparency and traceability in the food supply chain, so consumers can trace back the ingredients to their source,”* explains EHL Professor **Dr. Marc Stierand**. By providing immutable records of each transaction, blockchain enables consumers and businesses to verify the origin, movement, and quality of food products in real-time. *“This not only ensures food safety but also builds consumer trust by confirming the authenticity and sustainability of food items,”* says Dr. Stierand, who for many years was a member of the executive board of the Swiss Food and Nutrition Valley.

The study [Blockchain-Driven Food Supply Chains: A Systematic Review for Unexplored Opportunities](#) from the University of Otago examined the diverse applications of blockchain technology in the food supply chain and identified further areas of innovation where it could be used in the future, such as food donation and redistribution, supply chain financing, animal welfare, and food waste management. What’s more, the industry report [State of Blockchain Transformation: Supply Chain](#) from Settle Mint stated that 86% of supply chain leaders believe that the use of blockchain can offer a competitive advantage.

In parallel, innovative cooking technologies like sous-vide are revolutionizing food preparation methods. *“Sous-vide, which involves cooking food in vacuum-sealed bags at precise temperatures, preserves nutrients and enhances flavors,”* Dr. Stierand says. This technique leads to healthier meals with improved taste and texture, aligning with the growing consumer demand for food that is both nutritious and delicious.

EHL IAB-Member **Philipp Mosimann**, Managing Director of Mosimann's Private Dining Club & Global Events, also sees great potential in linking technology with gastronomy: *“Technology plays an increasingly vital and powerful role in shaping the future of food. It’s remarkable how it can be applied across the entire journey — from farming, where it helps reduce waste and water use while improving crop yields, to the kitchen, where AI-driven menu planning enables chefs to optimize ingredients and significantly reduce food waste”*. However, Mosimann notes that it should never be used as a replacement for people: *“Technology should never replace the human touch. Food, at its core, is about people — their skill, intuition, and passion. The real opportunity lies in using technology to enhance that craftsmanship, allowing chefs and producers to focus on flavor, experience, and storytelling, while technology quietly manages the logistics and sustainability data behind the scenes.”*

As these findings show, huge changes in food systems are already underway, driven by sustainability imperatives, consumer demand for authenticity, and the rise of new technologies. For the hospitality and foodservice industry, this represents both a challenge and an opportunity.

By embracing these shifts the industry can be part of the transformation of not only what we eat, but of how food is sourced, prepared, and experienced. It’s a collective journey in which every stakeholder – from farmers to chefs to consumers – plays a vital role in shaping a more sustainable and meaningful future for food.

HY8



Hospitality Leading the Immersive Experience Economy

Experience economy

EHL Research
EHL Research Team



EHL Research team argues that hospitality is entering a new phase of the experience economy, where guests no longer seek just “nice stays” but fully immersive, multi-sensory, and often co-created experiences that transform how they feel and remember a place. Drawing on frameworks like Pine & Gilmore’s four realms, it shows how hotels can blend human connection, storytelling, gamification, live events, and technology (VR/AR, projection, sensory design) to create deeply engaging moments that go far beyond functional service.

The hospitality industry has been leading the experience economy for decades. After the agricultural and industrial revolution came the development of the service industry, followed by the emergence of a fourth economic driver: the experience economy. Today, the experience economy is evolving, with demand rising for not just memorable experiences but truly immersive ones – a shift that hospitality organizations are uniquely positioned to embrace.

Traditionally, economists have categorized experiences together with services, yet experiences represent a distinct form of economic value. These days, it is clear that experiences stand on their own as a separate offering, driven by consumers’ growing desire for memorable, meaningful encounters and by the increased focus of businesses on designing and promoting experiences to meet that demand.

For the hospitality industry this represents huge potential for growth. As studies including the [Julius Baer Lifestyle survey](#) show, people prefer to indulge in experiences rather than products. According to the [Bain Altagamma study](#), experiences showed the strongest spending growth in 2024, as consumers prioritized travel, social events, and wellness-focused activities over traditional consumption.

THE FOUR REALMS OF THE EXPERIENCE ECONOMY

As the [Harvard Business Review](#) states, an experience is not an abstract concept, but a tangible economic offering, just like a service, a good, or a commodity. In today’s service-driven economy, many companies enhance their traditional products by surrounding them with experiences to make them more appealing. However, to fully capture the value of experiences, businesses must go beyond that and intentionally design immersive, engaging experiences that customers are willing to pay for.

According to Pine and Gilmore’s “[Experience Economy](#)” framework, all experiences can be categorized into four realms that interact with two dimensions: the customer’s level of participation and the extent of their connection with their surroundings. The first dimension ranges from **passive participation**, where the customer is an observer (as in watching a concert or play), to **active participation**, where the customer directly contributes to the event (such as skiing or performing in a play). The second dimension stretches from **absorption**, where individuals take in an experience from a distance (like viewing a film), to **immersion**, where they become fully enveloped in the environment (as in a virtual reality simulation).

Experiences can then be divided into four realms, each with its own relationship to the two dimensions: **Entertainment** (passive and absorbing), **Education** (active and absorbing), **Escapism** (active and immersive), and **Esthetic** (passive and immersive). The most compelling experiences combine elements of all four, creating a “sweet spot” that fully engages guests on cognitive, emotional, and sensory levels.

As EHL Assistant Professor Dr. **Valentina Clergue** emphasizes, the experience economy is hardly a new concept for hospitality. The industry has, in many ways, embodied it for decades. What is evolving, however, is the shift from passive to transformative experiences. *“In the past, guests might have been content with passive enjoyment, such as attending a concert, but now they seek active participation and co-creation, for example by taking part in a cooking class or an immersive dining event. We are moving towards a more holistic form of experiential marketing and consumption, where immersion provides an escape from daily routines and creates emotional connections that last far beyond the moment itself.”*

She adds: *“The hospitality industry has been naturally and continuously working to enhance the guest experience. With more offers and services available, the needs and desires of people have also shifted, leading them to seek deeper and more meaningful experiences in which they can fully immerse themselves.”*

What makes this so special in the hospitality industry is the human component, explains Dr. Clergue. *“In hospitality, you have not only the physical environment but also the human connection. In an art gallery, you might not need a person to greet or serve you, but in hospitality, it is about human interaction.”*

HUMAN CONNECTION IS WHAT MAKES HOSPITALITY STAND OUT

With the guest and their needs and desires at the center of an experience, the hospitality industry is uniquely positioned to harness the full potential that lies in the emerging immersive experience economy. *“The hospitality industry’s DNA is rooted in hosting, entertaining and, quintessentially, an exchange based on human interaction. It also comes down to the concept of ‘Hospitality Vibes’, which refers to the positive energy created by humans and spaces,”* says EHL Professor **Dr. Meng-Mei Maggie Chen**.

This human- and guest-centric focus is also one of the reasons why companies from luxury, healthcare, and other industries are collaborating with hospitality organizations in order to upscale guest experiences. For example, Tesla opening a diner with a drive-in theater in Los Angeles, Ralph Lauren launching a café in Kuala Lumpur, and Bulgari opening hotels in cities around the world.

When designing immersive experiences, there are no limits when it comes to creativity. A variety of tools and elements can be used, including gamification, which refers to the application of game-design elements and game principles in non-game contexts – an effective way to enhance guest engagement. Another tool is storytelling, for example embedding products within a narrative and experiential framework.

A prime example of an immersive experience is a pop-up in New York by the French luxury fashion house Hermès, which transformed an event space into an elaborate crime scene, offering guests an intriguing murder mystery experience. *“The luxury brand has used gamification and storytelling in order to create a unique, memorable and immersive experience for their customers,”* says Dr. Chen.

PLAYING WITH THE SENSES AND THE ROLE OF TECHNOLOGY

Brands can also make use of sensory elements that appeal to all five senses – touch, sight, hearing, smell and taste – by using light, scent, texture and sound to deepen emotional connections. Rooted in the concept of sensory marketing, these experiences engage the senses to create memorable and emotionally resonant encounters rather than merely functional services.

“Engaging the senses is key when creating memorable experiences. The more senses an experience stimulates, the deeper and more lasting its impact becomes, because sensory cues enrich the experience beyond the functional act itself and activate multiple senses to evoke emotion and immersion,” says Dr. Chen.

For instance, travelers instantly recognize Bombay Sapphire in airport duty-free shops thanks to its signature blue bottle. Even those without a Netflix subscription can identify the platform by its iconic opening sound. Visitors to Japan often remember the comforting warmth of a Japanese toilet seat long after their trip. Similarly, the familiar scent of Ivory soap or Johnson's baby shampoo can transport people back to their childhood, evoking deep, nostalgic emotions.

Technology is also accelerating the experience economy in hospitality by enabling new forms of engagement and immersion. Examples of immersive restaurants such as *Le Petit Chef* or Copenhagen's *Alchemist* show how projection mapping, storytelling, and sensory design can turn a meal into a multisensory journey.

Virtual and augmented reality are likewise reshaping hospitality experiences. VR lets guests explore hotels and destinations remotely, enhancing the booking process, while AR enriches on-site stays with interactive features such as digital menus or local insights. Restaurants use interactive displays for ordering and engagement, and hotels offer personalized in-room entertainment. Many brands now combine these tools to create immersive, story-driven experiences that make visits more memorable and emotionally engaging.

It is not necessary to have a huge budget to turn an experience into an immersive experience, emphasizes Dr. Chen. *“There are many niche opportunities for all types of businesses, whether big or small, to help people reconnect to real life and real human interaction by weaving the experiential into the offer. For example, a laundromat in the Netherlands has turned its business into a place for sharing food, meeting people and hosting parties,”* she says.

LIVE EVENTS AND BRANDED LUXURY EVENTS

Live events are increasingly shaping travel decisions, with travelers seeking experiences that go beyond sightseeing. Data shows that people often attend events not just for the act itself, but to enrich their travel memories. Iconic venues like the Sphere in Las Vegas or the Red Rocks Amphitheatre in Colorado illustrate this trend. Guests may see a band they have never heard of simply for the thrill of experiencing a concert in a unique setting.

Aside from live events, EHL Professor **Dr. Matthias Fuchs** also points to a possible rise in branded luxury life events. In recent years the events industry has seen a shift to so-called micro-events, smaller-scale gatherings designed to foster deeper connections and engagement among participants. *“Notably, there has been an increase in couples opting for smaller weddings with more personalized touches that reflect their unique personalities,”* Dr. Fuchs explains.

For example, Audemars Piguet's AP Houses are luxurious, exclusive spaces that reflect the brand's sophistication and elegance. *“These venues in prestigious cities allow VIP customers to celebrate their birthdays, enjoying personalized and memorable experiences in a refined setting.”* Dr. Fuchs believes this could expand even further as customer demand increases. *“While not a reality yet, one could also imagine bespoke weddings organized by a luxury brand such as Dior. From custom-designed dresses to branded event decor, Dior, just like other luxury brands, has the potential to ensure that these milestone celebrations are infused with their vision of luxury, sophistication and personalization, creating an immersive and memorable experience for guests while also enhancing brand loyalty.”*

A study from [McKinsey](#) shows that customer loyalty is driven less by the product and more by an experience worth paying for. Hospitality brands and travel providers can capitalize on this by curating distinctive, memorable experiences with or without collaborating with neighboring industries such as luxury brands or the healthcare industry. In a landscape of expanding options, restaurants, hotels, and other travel touchpoints can build on this momentum to craft meaningful moments that resonate with travelers and make their stays unforgettable.



Immersive experiences have become so important and popular because the expectations of our guests and travelers from all over the world have become much more sophisticated in the last few years.

◆ Christoph Hoffmann, IAB-Member and Founder of 25hours Hotels and Bikini Island & Mountain Hotels

Hoffmann has developed individual, tailor-made hotels with personality in cities worldwide. Each 25hours property is unique, with a playful design inspired by its location and influenced by the art, culture, gastronomy, and stories of its surroundings.

“We have dived into high-level individual experiences by using storytelling and design. We really built the style of our hotels not with the idea to merely create an aesthetic design, but to create an experience for our guests and asking the important questions of what the added value is when staying at a 25hours hotel,” says Hoffmann.

As the boundaries between hospitality and other industries continue to blur, the immersive experience economy offers boundless opportunities for innovation and growth. By embracing creativity, technology, and personalization, the hospitality industry can continue to lead the way and spearhead the immersive experience economy into its next chapter and beyond.



HYB



Best business strategy? Jimmy the barkeeper, Francis the breakfast waitress.

Hybrid Hospitality

Dr. Andreas Krobath

Founder & CEO at Absolute Future IT & Marketing



Dr. Andreas Kroboth, Founder & CEO at Absolute Future IT & Marketing, points out the obvious truth: we will have more tourists, fewer employees, and it makes absolutely no sense to waste precious human time on repetitive screen work. His message is simple: use every bit of automation you can, so your rare, emotionally intelligent team members can focus on the human moments that create great reviews, leading directly to higher ADR. In business models focused on upscale and luxury, this will be your main differentiator. And for all others, this waste will no longer be sustainable anyway.

And yes, besides Jimmy and Francis, there is also Jane at the front-desk. In upscale hospitality, your guest facing people will become more important daily, and they should be at the center of your business strategy.

INCREASING NUMBER OF TOURISTS.

Usually forecasting the future is difficult, however some trends are obvious. The growing middle class in Asia is filling the traveler pipeline with unprecedented force. The experience economy is adding growth dynamics on top. Massive investments in tourism infrastructure (eg., in Middle East) are another factor. Not to forget the permanent promotional fire on social media, causing a strong “I want this too” feeling.

All this leads to one conclusion: the number of tourists will increase for many years to come.

DECREASING NUMBER OF EMPLOYEES SERVING THEM.

On the other hand, the number of employees in hospitality? Not that much. Pure demographics leads to a decreasing workforce. And those left increasingly chose jobs with a “better work-life balance”. Which intensifies the stress for those still working in hospitality, often so much that they finally also leave this industry.

And I am not even talking about really qualified employees, equipped with training and most of all with an attitude and the emotional intelligence to create hospitable moments, worth to be remembered. Whoever thinks we already today suffer from a shortage: we ain’t seen nothing yet! The dimension of this challenge is foreseeable, and it is foreseeably HUGE.

NEED FOR AUTOMATION? URGENTLY!

Tradition? Not enough pain to change? Complex tech stack in a complex industry? I am not 100% sure about the reasons behind it, but overall it is pretty amazing, how much potential for automation has so far been left unused. There are many processes (check-in/check-out anyone?), which are more or less decision trees, waiting for automation.

Picture that: we are wishing and searching intensely for hospitable team members. And then we are wasting their time and talent with repetitive work behind screens, often annoying them additionally with outdated tools.

This doesn’t make any f#@king sense, and this is the most polite way I can describe it.

The good thing is, that the market will take care of it because this is not sustainable. To use whatever tools available, to free up human resources for doing what only humans can do will be a pure economic necessity.

HUMAN INTERACTION FOR POSITIVE REVIEWS

And now let’s close the loop. Everybody knows the importance of reviews for a successful business. Given the incredibly thin margins, the difference between 4.1 and 4.7 can make or break the economic success of a hotel. Of course, all the basics have to be in place. Cleanliness, comfortable beds, no noise, fast WiFi – all this is a baseline, not a differentiator (or if so, due to lack of it, in the wrong direction). By far the main reason for positive reviews? Always humans, or more concrete, human interaction.

Jimmy the barkeeper making and serving with pleasure the favorite cocktail although it was not on the menu. Jane the front desk agent, successfully comforting the tired and crying toddler, providing much needed help for the single mom who is busy taking care of her baby. Francis the breakfast waitress with the big smile, serving a filled bread basket from the buffet to the table because she realized that the elderly couple struggles a bit walking back and forth.

If your business model is purely around lodging (providing a safe place, bed and shower) – fine, you might not depend on it. But if you are in hospitality, this is exactly what you are looking for in your team. Attention, empathy, a serving attitude, friendliness, humanity at its best. Already today this is rare, therefore providing a real potential for differentiation. But combining the decreasing number of qualified employees, serving an increasing number of guests, these behaviors will not only be rare, but “remarkably rare”. So remarkable, that it will be reflected in raving positive reviews, lifting ADR to profitable heights.

HYBRID HOSPITALITY

Use every technology available to automate all processes where humans add hardly any value, and do so as soon as you can. Because this is the only way you will be able to attract (and afford) those team members making a real difference by adding value in ways only humans can. No matter how you call it, hybrid or not, it should be a central part of every sustainable business strategy in hospitality.

