



Technology Edition

NOW. NEXT. BEYOND. — Navigating Current
Innovation and Future Breakthroughs



The Hotel Yearbook
Foresight and innovation in the global hotel industry



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WELCOME TO THE HOTEL YEARBOOK TECHNOLOGY 2025

If you're flipping through this publication in search of buzzwords and hype, I'll save you some time... this isn't that kind of yearbook. *HYB Technology 2025* is where we talk about what's working, what's not, and what's just been duct-taped together for the 20th year in a row.



As someone who's spent the last two decades in the trenches of hospitality (as a hotelier, tech founder, consultant, educator, author, and, on some days, therapist to frustrated tech vendors), I've seen firsthand how this industry resists change like an old front desk printer. But the future isn't waiting for us to be ready. It's already checking in, and it's demanding free Wi-Fi, hyper-personalization, contactless everything, and immediate answers to questions we haven't even thought to ask yet.

The theme of this year's edition is **NOW. NEXT. BEYOND.** It isn't just a catchy slogan. It's a roadmap. We're exploring the practical innovations being implemented right now, the emerging solutions that are gaining momentum, and the bold, sometimes terrifying, breakthroughs that are coming whether we like it or not.

Inside, you'll hear from visionaries, operators, builders, and skeptics alike, sharing grounded advice, fresh perspective, and a few reality checks. This isn't a sales brochure. It's a guide for those of us who want to build better systems, smarter operations, and a more resilient industry.

So whether you're a tech-savvy hotel executive or someone who still prints out their night audit (no judgment... okay, maybe a little), I invite you to read, reflect, and ask yourself one simple question: **are we leading this transformation, or getting dragged along by it?**

Let's be brave enough to choose the first option.

Ira Vouk
Editor-in-Chief, HYB Technology 2025
Hospitality 2.0 Consulting
www.iravouk.com



HOTEL
TECHNOLOGY

Annual Survey Results: The State of Hospitality Tech 2025

Hotel Technology



The HYB Annual Tech Survey, conducted in May 2025, gathered 264 global responses from hotel companies, tech providers, consultants, and other industry stakeholders. This research was conducted with a goal to better understand the current state of hotel technology – what's working, what's not, and where the industry is headed next.

KEY FINDINGS INCLUDE

- **45% of hotel companies consider themselves tech-mature**, yet 23% rated their maturity at 3 or below, highlighting a sharp divide in digital readiness.
- **PMS and CRS are near-universal**, while advanced tools like CDPs remain rarely adopted (under 10% usage).
- **Budget allocation for technology remains modest**, with most companies spending under 10%, and 15% being the most common figure.
- When evaluating new tech, **ROI, guest experience, and integration ease** are the top priorities—while AI and automation remain secondary concerns.
- **Integration, fragmentation, and lack of industry standards** are the most commonly cited frustrations by both hotel operators and tech vendors.
- **Hotels are willing to innovate but they're stuck in a tech jungle with no clear path forward**. Both hoteliers and vendors will continue feeling like they're solving a puzzle with mismatched pieces.
- **Both hoteliers and vendors want collaboration** but the ecosystem is misaligned. Vendors blame each other and the legacy tech stack. Hotels blame integration limitations and outdated systems. Everyone blames fragmentation.

These results paint a picture of an industry that is eager to innovate but still navigating a complex, disconnected tech landscape.

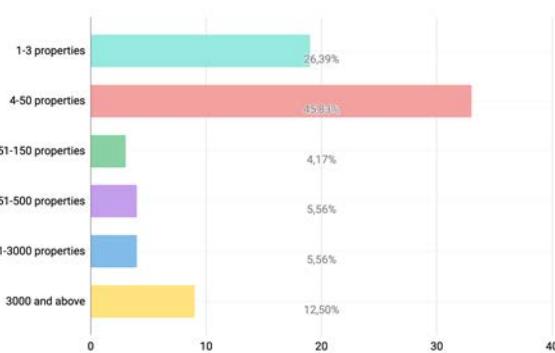
SCOPE AND METHODOLOGY

The survey gathered a total of 264 responses from industry professionals worldwide. It was distributed via direct email outreach and promoted through LinkedIn, targeting a diverse audience of stakeholders in the hospitality ecosystem.

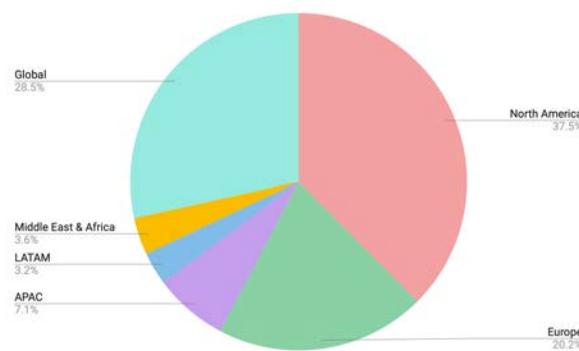
The respondents represented several key types of businesses within the industry:

- **Hotel Companies** (operators, ownership groups, franchises) made up 33% of total (86 responses).
- **Technology Providers** – 38% of all respondents (101).
- **Non-Technology Providers** were 5% (12 respondents).
- **Others** were industry consultants, academics, media outlets and associations (24% of total).

For respondents identifying as hotel owners, management companies, and franchises, the survey asked about their portfolio size. The distribution of responses was as follows:



The largest regional representation was from **North America**, with **37.55%** (95 respondents), with **Global** operations accounted for **28.46%** (72 respondents) and **Europe** represented by **20.16%** (51 respondents).

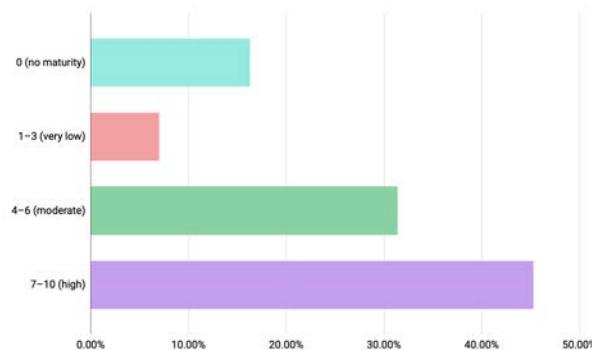


CURRENT STATE OF TECHNOLOGY ADOPTION

Respondents were asked to rate their organization's overall tech maturity on a scale of 1 to 10, where 1 signifies low maturity and 10 signifies fully integrated, cloud-based, and automated. 86 hotel companies responded to this question.

ON A SCALE OF 1 TO 10, HOW WOULD YOU RATE YOUR ORGANIZATION'S OVERALL TECH Maturity?

1 = *low maturity*
10 = *fully integrated, cloud-based, and automated*.



The average tech maturity rating, based on the survey responses, is approximately **5.35**.

However, the distribution of responses shows a **wide range of perceived maturity levels** indicating that hotel tech maturity is polarizing.

Only 2 organizations gave themselves a perfect 10. This shows that even among tech-forward players, **few feel they've "made it."**

Low maturity is still prevalent. Combining levels 0–3, we find that **23% of respondents self-identify as being on the very low end of the spectrum**, with virtually no integration or automation. This confirms the industry's well-known lag in digital transformation.

While the survey asked respondents to rate their organization's overall tech maturity on a scale of 1 to 101, a striking **14 out of 86 respondents (approximately 16.3%) gave a rating of 0.** This is particularly fascinating because "0" was not part of the defined 1-10 scale¹. The significant number of respondents selecting a value outside the provided range could suggest various interpretations: a perception of zero maturity, a non-applicable response, or perhaps a form of protest highlighting fundamental issues not captured by the scale.

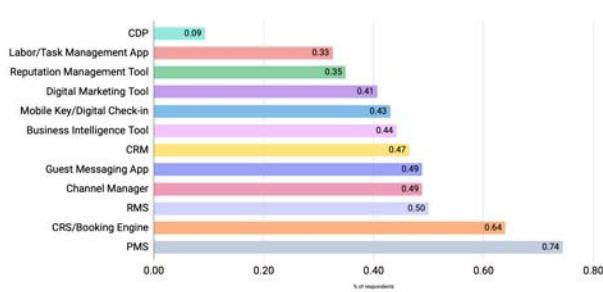
An analysis of the relationship between company size and tech maturity reveals a weak but noticeable trend: **larger hotel groups tend to rate themselves higher on the tech maturity scale.** When it comes to geography, tech maturity appears evenly distributed across regions, with no region significantly outperforming others.

WHICH OF THE FOLLOWING SYSTEMS ARE CURRENTLY IN USE AT YOUR PROPERTY/ORGANIZATION?

Respondents were also asked to indicate which of a list of systems are currently in use at their property/organization. As expected, the most commonly used system among hotel companies is the **PMS (Property Management System)** representing a 74.41% share.

The next most used systems are **CRS/Booking Engine** (63.95% share) and **RMS (Revenue Management System)** (50% share).

The **CDP (Customer Data Platform)** is still the least used system on the list, with only 8 respondents indicating its use. Given the industry focus on personalization and unified guest profiles, the low adoption of CDPs among these respondents is a noteworthy finding.



ROUGHLY, WHAT % OF YOUR COMPANY BUDGET IS ALLOCATED TOWARDS TECHNOLOGY?

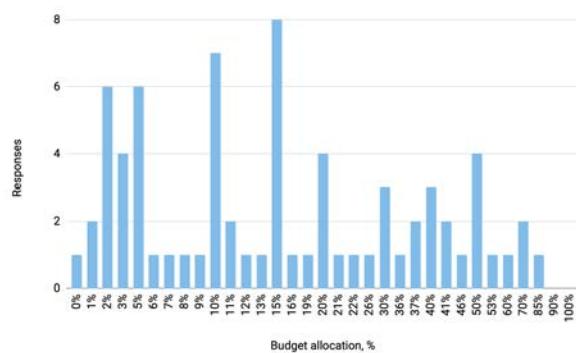
The average budget allocation towards technology is approximately **21%**.

However, the responses show a **wide variance in budget allocation**, ranging from **0% to 85%**. The most frequently cited percentage (**mode**) is **15% (8 respondents)**. Many percentages received only one or two mentions, indicating a **lack of strong consensus** on a typical technology budget percentage across the respondent base.

Overall, the data shows that most companies allocate very little to tech. **Over 30% of respondents invest 5% or less of their budget in technology.**

However, the distribution of tech budget allocation reveals a **bimodal trend**: while a significant portion of respondents allocate 5% or less of their budget to technology (suggesting limited investment and perhaps reliance on legacy systems) there is a noticeable cluster at the other end of the spectrum, with some companies dedicating 30–70% of their budgets to tech.

This "two-speed" adoption curve reflects a growing divide between **early-stage digital adopters** and **tech-forward operators** (often hybrid hospitality-tech companies) who view technology not as a cost center but as a strategic growth engine.

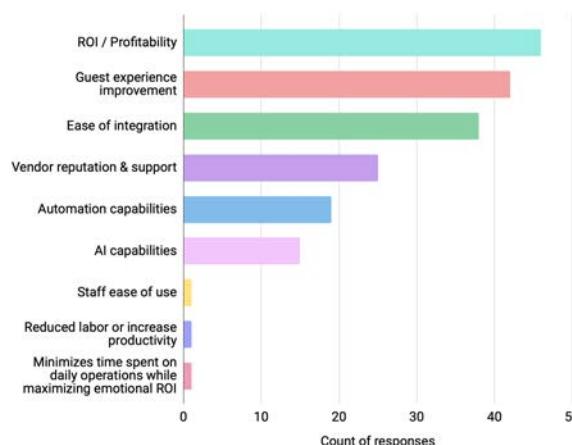


WHAT IS YOUR TOP PRIORITY WHEN EVALUATING NEW HOTEL TECHNOLOGY?

Respondents were asked to select their top priority when evaluating new hotel technology.

Results show that hotel tech decisions are mainly driven by **financial impact, guest-facing value, and ease of deployment**. Emerging innovations like AI matter but only after the basics are in place. Vendors focusing on ROI, seamless integration, and enhancing the guest journey are most likely to win attention and adoption.

ROI / Profitability was the most frequently selected priority, chosen by **46 respondents (53.48% share)**.



The frustrations reveal a consistent truth: **it's not that hotels don't want to innovate, it's that they're stuck in a tech jungle with no clear path forward.** Until open standards, seamless integrations, and true data interoperability become industry norms, both hoteliers and vendors will continue feeling like they're solving a puzzle with mismatched pieces.

Both sides want collaboration but the ecosystem is misaligned. Vendors blame each other and the legacy tech stack. Hotels blame integration limitations and outdated systems. Everyone blames fragmentation.



WHAT IS YOUR BIGGEST CURRENT FRUSTRATION WITH HOTEL TECH?

This open-ended question elicited a wide variety of frustrations from different stakeholder groups. The dominant themes revolve around **integration, fragmentation, and complexity.**

Summary of responses received from Hotel Companies (ownership groups, operators, franchises):

- **Integration issues** were the most frequently cited frustration (e.g., "slow integration", "integration dependencies", "challenges with integrating solutions from several vendors").
- **Fragmentation** came up repeatedly: too many tools, not enough cohesion.
- **Lack of standards** and **legacy infrastructure** are slowing down adoption and innovation.
- There's growing **irony fatigue** around AI buzzwords when basic infrastructure (like Wi-Fi or check-in) isn't functioning reliably.
- **Operational lag**, especially in segments like MICE, highlights major gaps in tech adoption across departments.

Technology Vendors:

- Vendors echo many of the same concerns, especially around **fragmentation, silos, and poor interoperability**.
- There's **frustration with the vendor ecosystem itself**: issues like pricing barriers for integrations, inconsistent platform quality (PMS, CRS), and resistance to standardization.
- **Data sharing and open APIs** are cited as critical roadblocks, with many systems still limiting access or integration opportunities.
- Vendors are also seeing challenges with **client-side adoption, training, and understanding of AI**.
- **Market immaturity and legacy dependency** remain major pain points, even for newer tech providers.

HUB

The Great Debate — All-in-One vs Best- of-Breed: What Should Hotel Tech Vendors Focus On?

Viewpoint



In today's hotel technology landscape that evolves faster than a guest's mood, everyone seems to be asking the same question: should vendors try to be everything, everywhere, all at once... or just be really, really good at one thing? The rise of all-in-one platforms has promised a seductive utopia for hoteliers — one vendor, one contract, one login, and (hopefully) one number to call when everything breaks. From PMS to RMS to CRS to CRM (and all the other TLAs), a single solution sounds like a dream... until it turns into a bloated jack-of-all-trades that's master of none.

On the flip side, there's the best-of-breed philosophy: vendors that focus on doing one thing exceptionally well, whether it's revenue optimization, guest engagement, or distribution connectivity. These tools are sleek, specialized, and powerful... until it's time to integrate them into a legacy tech stack held together by duct-tape and heavy weight of outdated code. Yes, these niche players may be more innovative and agile, but do hotel teams really have the bandwidth (or patience) to manage 14 logins, 9 invoices, and a dashboard that looks like a cockpit on a space shuttle?

So here's the question: As hotel companies become more tech-savvy and expectations around connectivity and ease of use continue to rise, where should vendors focus their product strategy? Should they aim to be the Swiss Army knife of hospitality tech, or the scalpel that fits perfectly into any modern stack? **Is it better to be a one-stop-shop or the best plug-in on the shelf?**



ADAM MOGELONSKY

Partner at Hotel Mogel Consulting Ltd.

All-in-one, hands down. Advantages are:

- Fewer vendors to talk to, saving time
- Fewer dashboards to look at, preventing dashboard fatigue
- Fewer interfaces to maintain
- Better data streaming (not guaranteed though)
- Streamlined billing

There are exceptions to this, especially for emerging categories, but in a world of "*satisficing*", keeping it simple rules the day.



FERGUS BOYD

Hospitality Consultant

A very topical question which also came up at the HFTP Barcelona CIO Summit recently. There was no single answer as it will always depend on the particular situation. For a small hotel/BnB, a combo PMS/POS/IBE product like Avon Data, Heart or BookAssist may suffice and would do a very good job. For larger properties that major on Spa, M&E as well as room and restaurants, the picture is harder. I keep a matrix of which supplier (PMS, POS, Spa, IBE, RMS, M&E, CRM etc) links to which other supplier, and it changes weekly. Also, not all "open APIs" are the same. When you dig deeper, many are 1-way, 1.5 way, 2 way but with restrictions. Platforms seem to be the new black, and the big players like Access Group, Oracle, Shiji, and Agilysys are buying out the innovative, niche startups.

This sometimes works provided that the platform isn't just a brand veneer over the original disparate systems. Add geography and the picture is even more complex. In Soho House we had 45 sites across 5 continents. Also add fiscalisation. Boom - you end up with 1-2 choices, unless you are willing to compromise.



MARK FANCOURT

Co-Founder at TRAVHOTECH

In a word, yes.

All the major players in industry are working towards a hospitality 'platform' solution. Yes, you may be able to purchase the pieces separately, which is purely commercial. But they are designed and intended to support across business operations. Pick a software name, that is where they are headed and they are also using the language.

Why? Because all the industry challenges point to this type of a solution. Staffing, increasing revenue through sales of all inventory, cohesive staff experience, cohesive guest experience, simplicity and removal of layers of tech along with cost, single set of business information, true real time pricing and demand management. The list goes on.

It's not for everyone based upon the physical makeup of the property and business itself. The simple rule of thumb is that if you have anything meaningful to sell to a customer beyond a room, then you will need a platform to offer that, as well as the capability to place the product on the digital shelf.

Or you can keep doing it manually. Or not at all.

This is how the guest has always seen our industry. It's about time we looked at things that way too.



MICHAEL TOEDT

CEO and Founder, dailypoint

WHY BEST-OF-BREED IS THE FUTURE

The best guest experiences aren't built on compromise—and neither should your tech stack be. While all-in-one hotel software systems promise simplicity, they often underdeliver on depth, innovation, and flexibility. In contrast, a best-of-breed strategy empowers hoteliers to select top solutions for each function — PMS, CRM, RMS, IBE, ... — and connect them in real time.

The game-changer? A Central Guest Profile (CGP). When data from all sources is unified, and continuously updated in a CDP/CDM, hotels gain a 360° view of every guest. This single source of truth enables personalized service, intelligent automation, and superior guest experiences across the journey.

All-in-one systems struggle to keep pace with best-in-class tools and often lock hotels into rigid workflows or outdated features. They risk becoming data silos instead of enablers.

Ask yourself this: Would you really drive a car where 100%—engine, tires, electronics, even the seats—comes from one manufacturer? Of course not. You want the best of each.

Best-of-breed isn't complexity—it's strategic precision. With real-time integration and a CGP at the center, your IT stack becomes an ecosystem that adapts, evolves, and performs.

In hospitality tech, flexibility and specialization are not luxuries. They're survival.



ANDREW EVERS

Group Director of IT, Rocco Forte Hotels

The Swiss army knife Vs scalpel analogy is an excellent one. A SAK is capable of lots of things well enough for 80% of people 80% of the time. It may not be a case of "either one or the other", you may want both a SAK for most things most of the time and also a scalpel for the one thing your brand need to be doing with absolute precision. In our luxury space, our toolbox contains multiple scalpels. The challenge of managing multiple scalpels and getting them to talk together and provide consistent and consolidated output is a price we are willing to pay for the difference between "80% of people, 80% of the time" and precision. Having said that, the less critical functions where there are several targets that are similar, of course we have at least one SAK! When you need to hit a target and not necessarily smash it, who wouldn't?



SIMONE PUORTO

Head of Emerging Trends and Strategic Innovation,
Hospitality Net

Like everything in life, there's no one-size-fits-all.

For small or independent properties, best-of-breed gives speed, flexibility, and access to laser-focused tools that do one thing exceptionally well. That kind of modularity is a feature, not a bug. You can experiment, pivot, and replace components without rewriting your entire operational DNA.

But once you start scaling (think 100+ rooms, multiple outlets, spas, golf courses, or multi-property groups), the cracks begin to show. Fourteen tools mean fourteen logins, contracts, support teams, and invoices, and a minor update in one app can break workflows across the board. And suddenly, your team is spending more time babysitting the tech stack than actually running a hotel.

This is where all-in-one platforms start to make sense. Not because they're flawless, but because they offer operational cohesion. For complex, multi-department hotels, that consistency matters. It reduces friction, accelerates onboarding, and lets leadership focus on guests and growth instead of playing systems integrator.

And the irony? Many best-of-breed vendors are now morphing into quasi-all-in-one suites—adding POS, CRM, RMS, you name it. Meanwhile, the all-in-ones are scrambling to open their APIs and act more modular.

This isn't a battle of approaches. It's a convergence in slow motion.



MAX STARKOV

Hospitality & travel technologist and digital strategist

From a technology perspective, the hospitality industry will continue to have a PMS-centric hotel tech stack approach. The question is, what kind of a PMS? Luckily for our industry, the future is already here in the form of a cloud with Open API (application programming interface) integration platform. Ever since the emergence of the cloud-first PMS platforms Mews and Cloudbeds, and of Opera Cloud five years ago, there has been a monumental shift in the PMS vendor community's mindset: from closed system mentality to cloud PMS with Open API mentality.

In the near and mid-term, any full-service 3-4-5-star hotel will need over 100 plus APIs with third-party tech applications and solutions to be able to function and meet the basic needs and wants of today's digitally-savvy travelers. These include AI Agents, guest experience, issue resolution apps, guest messaging, virtual concierge, IoT, smart room technology, CRM programs, etc.

So, the question is: should hospitality tech vendors aim to become a one-stop-shop or a best-of-breed plug-in? The above already provides the answer: unless you are a cloud PMS, your hospitality tech company should aim to become the best-of-breed plug-in vendor in your category: Agentic AI platform, PMS, CRS, CRM, Channel Manager, etc.



CUSTÓDIO BARREIROS

Founder & CEO, EIP MGT

The "*all-in-one vs. best-of-breed*" debate in hotel tech is far more than a theoretical exercise—it's a daily operational challenge with real consequences. The issue isn't with best-of-breed solutions themselves, but with the lack of true collaboration among vendors. The outdated notion that specialised systems create chaos is simply untrue; what really causes friction is siloed thinking, restrictive APIs, and business models that protect turf rather than enable value.

Best-of-breed thrives when vendors act as genuine partners—prioritising open integrations, seamless data sharing, and a shared focus on client outcomes. I've seen purpose-built platforms outperform generic, all-in-one solutions—provided there's an ecosystem mentality. Hoteliers don't want fewer systems; they want less friction and more interoperability, so their tech stack works as a cohesive whole.

For vendors, the strategic question isn't about becoming everything to everyone, but about being essential in what you do best and collaborating with others who complement your strengths. The future belongs to those who champion openness and execution over ambition and lock-in. True industry progress will come from building ecosystems that empower every player to excel, ultimately benefiting the operator, the guest, and the bottom line.



ULI PILLAU
Founder and CEO of Apaleo

This debate boils down to convenience versus capability. All-in-one systems promise simplicity, but not without trade-offs including limited flexibility, slow innovation and diluted functionality.

More importantly, the all-in-one model is becoming obsolete as the industry shifts from Software as a Service (SaaS) to Results as a Service (RaaS), making software value measurable by business outcomes, not user subscriptions.

AI agents are accelerating this shift. Now, instead of buying CRM software, hoteliers can deploy an agent that recognises returning guests, triggers personalised offers and drives upsells. Agents deliver a high ROI because they can be tasked with specific, measurable outcomes.

The agent-first era fundamentally changes the way we think about tech strategy. In this architecture, you no longer need to map out which tools to connect. You simply set a goal, such as—"handle guest FAQs" or "manage overbookings"—and the agent executes the steps to achieve it. This reflects the core shift from SaaS to RaaS. Value is delivered through outcomes.

Businesses will only demand more AI agents. But agents need open environments, a capability inherent within the open best-of-breed model, not closed all-in-one systems.

"Best-of-breed" isn't just a better strategy. It's inevitable as businesses increasingly expect performance not promises.



BINU MATHEWS
CEO at IDS Next

Best-of-breed systems were built in a different era, where software technology was expensive and time-consuming to implement. Now, times have changed, and today's new-generation vendors are developing tech stacks that function as all-in-one solutions. There is no doubt about the right strategy moving forward: it is all-in-one.

With a centralised platform, these solutions offer several key advantages, including a unified data layer and a single source of truth for guest data across multiple revenue touch points. An added benefit is eliminating the need for interfaces between multiple modules, such as reservations, PMS, POS, spa management, inventory, catering, and finance. This results in reduced maintenance, as there are fewer breakpoints to manage.

That said, hotels still require additional solutions such as web booking engines, RMS, Wi-Fi systems, and door lock systems. These, however, can be seamlessly integrated into platforms without compromising data integrity.

A well-structured data layer, with clean, categorised data, lays the foundation for advanced tools like artificial intelligence, business intelligence, and whatever comes next in hospitality tech innovation. So, my answer remains: the future of hospitality will be all-in-one platforms.



JACOB MESSINA
CEO at Stayntouch

As hotels become more tech-savvy and their operations more complex, the choice between an All-in-One platform and a Best-in-Class tech stack is becoming harder to ignore. All-in-One systems promise simplicity—one vendor, one login, one support line—but that convenience comes at the cost of innovation and flexibility. When a provider tries to cover everything from PMS to CRM to RMS, they stretch themselves thin, leading to slower development and shallow functionality that limits you to a single operational workflow: i.e., a hotel needs to operate how the software works, not the software supporting a hotel's business needs. That can leave hotels stuck with tools that don't fully support their day-to-day needs—or worse, with no real influence over where the product goes next.

For something as mission-critical as a PMS, that's a major risk to any complex hotel operation. Hotel operations are complex, and a one-size-fits-all workflow just won't cut it. That's why it's essential to partner with a provider dedicated to developing its core PMS functionality. A Best-in-Class PMS vendor takes a thoughtful, purpose-driven approach to development by listening to customers in order to build robust features, expanding capabilities, and continuously driving innovation where it matters most. This commitment often leads to stronger partnerships, where hotels receive not only responsive support but also a meaningful voice in the product roadmap. Rather than being just another account number, hotels collaborate with a vendor who's genuinely invested in their long-term success—someone who listens, adapts, and delivers enhancements that make a real difference.



TANYA PRATT
Global Vice President of OPERA Cloud Strategy and Product Management at Oracle Hospitality

As unified platforms gain traction - delivering integrated solutions under one provider, contract, and user interface - many hoteliers are asking: can a single vendor truly cover it all, or is a best-of-breed approach still superior?

Best-of-breed systems excel in specialization and flexibility, enabling hotels to tailor solutions to their unique needs. Yet, they often come with integration hurdles, higher costs, data silos, and increased complexity in managing multiple vendors and compliance requirements. Unified platforms, by contrast, streamline operations. With one accountable partner, support becomes more efficient, and a unified roadmap ensures every component, whether PMS, CRS, CRM, or S&C, evolves in sync. This reduces friction, accelerates deployment, and promotes departmental alignment. However, unified platforms can sometimes lack the deep functionality required by more specialized or complex operations.

The most promising future lies in composable unified platforms - a hybrid model. These platforms offer the efficiency and cohesion of unification while allowing hotels to plug in best-in-class solutions where needed. Composability provides the adaptability to evolve, scale, and innovate - enabling hoteliers to build a tailored ecosystem that works seamlessly together. It's not about choosing one or the other, but bringing the best of both worlds into harmony.

**KEVIN DUNCAN**

VP, Product Management, Cendyn

Maximizing efficiency and insights through centralized technology is rapidly becoming the new standard. As more software vendors and their customers prioritize the security of cloud infrastructure, the need for consolidation has prompted many software companies to consolidate services to drive efficiency and increase profitability. However, hoteliers and technology specialists must collaborate closely when seeking to leverage unified data streams in today's complex ecosystems.

While it seems elementary, one of the keys to success is to unify disparate data streams. Partnering with a single, full-scale vendor transforms the way businesses manage their data and operations. By centralizing guest profiles, pricing engines, and distribution channels into a single, cohesive hub, organizations can eliminate blind spots and data silos, thereby paving the way for seamless connectivity. This integration not only enhances operational clarity but also ensures that every data point is accessible, actionable, and synchronized in real-time.

Open APIs are the backbone of modern, flexible technology ecosystems. These interfaces enable businesses to customize their systems without requiring extensive integrations, new development, or reliance on additional third-party solutions. While certain specialized tools may still be necessary to meet specific requirements, open APIs ensure that the foundational tech stack remains stable and consistent. This approach strikes a balance between customization and operational efficiency, allowing businesses to adapt to an ever-evolving technological landscape.

Working with a single partner who owns the end-to-end technology stack dramatically accelerates time-to-value. Faster deployments become the norm, as does consistent maintenance, which reduces downtime and ensures reliable performance. Moreover, having a single unified support line eliminates the complexity of managing multiple vendors, invoices, and login credentials, thereby simplifying operations and improving responsiveness. This approach streamlines workflows and reduces operational friction, allowing businesses to focus on strategic growth rather than administrative burdens.

A centralized technology ecosystem not only consolidates data but also unlocks the potential for unified reporting and analytics. For instance, a comprehensive view enables smarter revenue strategies by identifying trends, forecasting demand, and optimizing pricing. Delivering personalized guest experiences becomes easier as businesses can utilize detailed profiles and preferences. Additionally, real-time insights empower businesses to implement proactive operations, addressing issues before they escalate and ensuring seamless service delivery.

By unifying data streams, leveraging open APIs, accelerating implementation, and unlocking real-time insights, businesses can position themselves as agile, data-driven leaders in their industries. Centralized technology is no longer a luxury but a necessity in our increasingly interconnected world, enabling organizations to achieve both operational excellence and exceptional customer experiences.



HYB



Hospitality's Innovative Future Rests on Modular and Integrated Proptech Solutions

Property Technology

Nicolás Aznar

President, Americas at Vingcard, an ASSA ABLOY brand

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ASSA ABLOY

The hospitality industry has never lacked technology. What it has lacked is cohesion. For years, hotels have layered system upon system, vendor upon vendor, hoping that one more plugin or upgrade might unlock the seamless guest experience everyone talks about but few actually deliver. And yet, despite all the investment, many properties still find themselves stuck, trapped between legacy infrastructure and rising guest expectations. It is not a lack of innovation that is holding them back. It is fragmentation. In this article, we explore why the future of hospitality depends not just on more tech, but smarter, integrated tech, and how a modular, connected approach is reshaping everything from operations to the guest journey.

Evolving guest expectations have led the hospitality industry to a vital crossroads over how it approaches advances in technology. Legacy systems once considered sufficient to meet operational needs, are now demonstrating their limitations as siloed and rigid platforms standing in the way of innovation. To keep pace with demands for faster and more personalized service, hospitality's future instead lies in embracing a more cohesive, modular, and integrated strategy towards property tech stacks; one that allows for seamless communication across systems, future-proof scalability, and a unified ability to deliver exceptional guest experiences at every touchpoint.

WHY HOTELIERS ARE LEAVING FRAGMENTED TECHNOLOGY BEHIND

The hospitality industry has historically been characterized by a patchwork of disconnected systems. A hotel might deploy one vendor for keycard access, another for the property management system (PMS), and yet another for energy management. These systems traditionally have been developed independently and don't typically communicate effectively with one another. For properties aiming to enhance efficiency and benefit from data-sharing insights, working with legacy solutions often translates into requiring extensive and complex workarounds or manual oversight to ensure interoperability. Even when able to be achieved, this frequently can result in experiencing errors, unpredictable performance and other unforeseen issues cropping up.

Technology fragmentation doesn't just result in operational inefficiencies but also hinders innovation and the opportunity to create a better, more unique guest stay. When data lives in isolated silos, customizing services based from holistic insights becomes extremely challenging if not impossible. For example, if a hotel's access management system doesn't share data with PMS and energy management platforms, it misses out on the opportunity to automatically personalize in-room temperature and lighting according to individual preferences, while also needlessly wasting energy within unoccupied rooms. For organizations still utilizing siloed systems, it is estimated that an average of \$12.5 million is lost due to poor or incomplete data access.

A NEW ERA OF INTEGRATION

The future of hotel operations therefore requires a modular and adaptable approach to proptech. This enables hotels to select best-of-breed solutions for different functions while maximizing the benefits of integration. Instead of being locked

into monolithic platforms that attempt to do everything but excel at little, hoteliers can alternatively assemble a custom technology stack tailored to their specific needs and business goals.

Newer industry solutions are prioritizing the need for modular adaptability and by being designed as cloud-native systems. Typically featuring robust open API capabilities, these cloud-based platforms ensure that different technologies can integrate effortlessly, reducing the complexity of onboarding new solutions or retiring outdated ones. The result is a flexible, future-proof infrastructure capable of evolving in step with changing hotel priorities, guest preferences and advances in industry innovation.

TAKING A MORE HOLISTIC APPROACH TO HARDWARE

Whether for locks, thermostats, or surveillance cameras, a hotel's hardware has usually been managed as separate and disjointed devices. But advances in innovation increasingly centers on how these devices can connect, share data, and respond to contextual inputs as part of a seamlessly unified operational ecosystem.

For instance, geolocation-based sensors could determine a guest's real-time onsite location and push promos and service recommendations when integrated with a hotel's mobile app. Integrated guestroom televisions can likewise provide a valuable opportunity to tailor and suggest available offerings based on hotel areas that a guest has visited or previous purchase history listed within a guest's profile on a hotel's PMS. On the operational efficiency side, integrations between hardware such as lights, locks or elevators with maintenance systems can proactively monitor for malfunctions- preventing any lengthy lapses in service quality while potentially saving hoteliers from costly repairs. Integrations with thermostats, lights, drapes and other smart guestroom devices can cut costs by 15 percent. Together, these combined hardware efficiencies add up to create a smarter, more responsive environment where operations run more smoothly and guests a higher quality of service.

TYING EVERYTHING TOGETHER WITH ENHANCED DATA INTELLIGENCE

Underpinning the shift towards integrated proptech is the ability to access comprehensive and actionable data. When systems are integrated, they generate a continuous stream of high-value real-time insights. By adopting a centralized database location for such insights, hoteliers can gain a clearer view of guest behavior, room utilization, energy consumption, and operational performance. Properties can significantly use this data to make informed updates to business strategies and automate workflows.

Examples include leveraging predictive analytics to optimize housekeeping schedules based on real-time occupancy, streamlining staff workloads while saving guests from needless interruptions.

Another instance can be analyzing inventory usage to make accurate forecasts that avoid the risk of overordering or underordering items. These capabilities are only possible when data flows freely across fully integrated systems. Such advantages and more are unsurprisingly behind why 78 percent of hoteliers consider data strategies to be extremely important to their business strategy.

SECURITY AND SCALABILITY: NON-NEGOTIABLES IN MODERN INFRASTRUCTURE

While there are many clear advantages to deploying integrated hotel systems and services, industry businesses must inevitably also address growing concerns around cybersecurity. As hotels become more digitized, they become increasingly attractive targets for cyberattacks. This makes it essential that any integrated system employs end-to-end encryption, especially when involving sensitive guest and business data.

With hackers increasingly devising more sophisticated methods for circumventing a property's various protections, hoteliers should always aim to deploy solutions that can easily be upgraded as circumstances evolve. For example, cloud-based software can receive continuous and automatic updates whenever a new vulnerability or improved method for providing protection is discovered. Cloud-based software is increasingly also being proactively monitored directly by solution providers, with suspicious behavior quickly identified before any potential harm takes place.

REDEFINING VENDOR RELATIONSHIPS

This shift is also reshaping how hotels work with their technology providers. No longer just suppliers of products or services, providers are having to step up and take a more active role in creating and maintaining seamlessly interconnected operations. To be successful, vendors must be able to embrace openness, provide robust integration support, and commit to long-term compatibility with emerging technologies.

Hoteliers, in turn, must evaluate vendors not just on their current solution capabilities, but on their willingness to collaborate and adapt. The most effective industry technology partners are those who see themselves as contributors to a single ecosystem of systems, devices and services, instead of simply catering to a specialized focus.

LOOKING AHEAD TO HOSPITALITY'S FUTURE

Today and tomorrow's hotel is therefore not built from isolated components but must instead function as an intelligent, interconnected environment where systems work in harmony to serve both operational goals and guest expectations. It must also be able to readily embrace change as trends evolve and as technology inevitably advances.

To ensure their ability to adapt to this new industry environment and maintain a competitive edge, hoteliers should examine their existing operations and keep the following best practices in mind:

- **Audit existing systems** to identify integration gaps and operational inefficiencies.
- **Prioritize open architecture** when selecting new technology, ensuring it can connect to other solutions.
- **Invest in data management capabilities** that facilitate comprehensive real-time decision-making and continuous improvement.
- **Foster internal alignment** between IT, operations, and guest services to ensure a unified vision for technology use.

Although transformation can't be expected to occur overnight, the direction is clear. Fragmented systems are becoming obsolete. The hotel businesses that will thrive in the coming years will be those that embrace a modular approach to their tech stack with a priority placed on end-to-end integration. By breaking down silos and embracing a flexible, interoperable infrastructure, hoteliers can build smarter properties, empower staff, and exceed guest expectations in ways that were previously out of reach.



HOTEZA



Do's & Don'ts of Going Paperless and Digital in the Guest Journey

Data & Insights

Nikolay Beloshitsky
CEO and founder of Hoteza



If you have traveled in the past couple of decades, you have likely experienced a hotel room overflowing with printed material. Menus, brochures, directories, safety guides, city maps, and the occasional glossy magazine were all part of the package. While once helpful, this paper overload feels increasingly out of place in today's connected world. Guests now expect simplicity, clarity, and digital access.

The hospitality experience is shifting, and with it comes the opportunity to rethink how we deliver information in a more modern, efficient, and guest-friendly way.

For everyone who has had experience traveling in the last decades, there's a universal truth that they might or might not have noticed when it comes to hotels, especially hotel rooms. With every single room came an abundance of papers. Menus, SPA brochures, hotel directories, an obligatory emergency guide, don't forget about the city maps and inevitable magazines, to mention a few.

While it might have been appreciated in the past when you couldn't easily look up things, visual clutter can feel overwhelming today and seem outdated in a contemporary setting. Guests don't appreciate it, and the housekeeping staff is not fond of it either.

They in this case, guests prefer quick and easy access to everything that comes as a benefit of digital access through their phones, tablets, or in-room technology. While going paperless can seem excessive to some or like an attempt at greenwashing, it will be a welcome change for most.

Imagine a gorgeous hotel: everything looks impressive at first glance. But then you are hit with a mess of brochures, menus, and flyers everywhere. It is clear they were trying to be helpful, but the whole thing feels a bit chaotic, as if no one has thought through the guest experience.

At the same time, similar hotels that have chosen to make their materials digital instantly seemed more coherent visually. Sleek interior design was in sync with the idea of conveying information through in-room TV and my phone screen, and it was everything I needed. The hotel took its task seriously, creating a coherent physical and mental space.

Working with hotels has opened my eyes. I've seen how digital tools can reduce waste and seriously improve the guest experience. Simplify day-to-day tasks, create new ways to connect with guests, and even unlock revenue opportunities that weren't there before. Everything feels smoother and more thoughtful, turning a stay into something more intentional.

Obviously, transformation is not plug-and-play; that much is clear. There are clear rules to follow when taking this step, so allow me to tell you what will work and give you my list of do's and don'ts.

10 DO'S

1 DO ELIMINATE PAPER, BUT DO IT THOUGHTFULLY

Start with what guests use, like in-room dining menus or spa information, and move that into a digital-first approach. Don't just mindlessly throw away everything overnight. Prioritize high-impact content that will make the most significant difference.

2 DO CENTRALIZE YOUR CONTENT MANAGEMENT

Scattered PDFs and print-ready files saved across different platforms are a guaranteed way to miss updates and communicate inconsistent messages. Instead, a unified content management system will ensure that every screen shows the same correct information.

3 DO OFFER ACCESS VIA THE GUESTS' DEVICES

This is the simple truth: guests might like your shiny new tech but prefer to interact with your staff using their smartphones. Make their wish come true by giving them a user-friendly app they can load whenever that doesn't require a 40-step login.

4 EMPOWER YOUR GUESTS TO MAKE A CHOICE AND SHOW THEM THE RESULT

It can be easy to skip the sustainable options when there is no actual impact. Show your guests they have options and what those options will result in – how much water is saved by skipped cleaning or reduced housekeeping. Please give them the choice to support sustainability with you.

5 DO ALLOW FOR PERSONALIZED COMMUNICATION, NOT JUST GREETINGS

The first name displayed across various touchpoints during the check-in might seem like a lot, but it's a bare minimum. Personalization should be meaningful and relevant. Offer a discount at your SPA or a complimentary drink; don't just say hi for the sake of it.

6 DO USE IN-ROOM SCREENS FOR AMBIENT PERSONALIZATION

It all changes once you realize TVs can be more than just news-watching white-noise machines. Welcome your guests, display personalized offers, promote visual guides – show, don't just tell. And, of course, let them cast their content during their stay.

7 DESIGN A COMMUNICATION JOURNEY, NOT JUST ONE-OFF PROMOS

Upselling works best in context: a gentle welcome message, a mid-stay upgrade offer, ideal refreshments during any given activity, and a pre-checkout late departure deal. Create automated flows that arrive quickly, not badly timed upsell pushes.

8 DO GIVE GUESTS REAL-TIME ACCESS TO HOTEL SERVICES

Booking the SPA, ordering wine, asking for extra pillows, or anything else if that matters should always be one tap away. Through an in-room tablet, ideally, creating a smooth in-room experience.

9 DO THINK BEYOND GREENWASHING WHEN CUTTING PAPER

Yes, removing print helps the planet not to mention cutting costs for you. But even more importantly, it allows guests to experience a truly clutter-free, calm, and curated environment.

10 DO INVEST IN SYSTEMS THAT TALK TO EACH OTHER

Creating a harmonious ecosystem in your hotel's backend should be a priority, not only for the sake of your staff but also to create a frictionless guest experience. PMS, guest experience platform, entertainment, and communication tools should all integrate and work together, not just add to the pile.

10 DON'TS

1 DON'T TREAT "PAPERLESS" AS JUST AN ECO-STATEMENT

You're missing the real benefit if it doesn't improve the guest experience. Focus on utility first, then celebrate sustainability.

2 DON'T GIVE GUESTS FIVE PLATFORMS TO NAVIGATE

A hotel stay should not feel like an escape room experience. For example, is there a TV menu that works with a QR code you have to scan to get to a separate app to order food? Don't create a disjointed experience; opt for unified access whenever possible.

3 DON'T IGNORE THE PHYSICAL SPACE YOU'RE FREEING UP

Going paperless creates a visually calm, elevated luxury feeling. Don't replace paper stacks with random devices, more decor, or clutter. You've gotten to this point; now keep it minimal.

4 DON'T ASSUME EVERYONE WANTS TO SKIP CLEANING

Sustainability doesn't mean denying service or dropping service standards. Don't assume how much of their comfort guests are willing to compromise for a green policy, but give them actual control over it.

5 DON'T CONFUSE PERSONALIZATION WITH SURVEILLANCE

Having the option to do something doesn't mean you need to do it entirely, and this goes double for the collected data. Stay transparent with your guests' data, use insights to create meaningful personalizations, and do not creep them out.

6 DON'T GET AGGRESSIVE WITH YOUR PROMOTIONS

Hourly notifications about every service under the sun? That sounds like a fast track to being permanently blocked on all devices. I keep mentioning it, but meaningful personalization is the key. Time it correctly, and keep your segments in check.

7 DON'T TREAT THE TV AS AN ADDITIONAL THING TO DUST

Well-placed, visually drawing real estate? Use it wisely. Through streaming and casting, in-room displays can welcome, inform, upsell, and entertain.

8 DON'T IGNORE THE POST-STAY

The guest journey doesn't end at check-out. Use your app or message channel to follow up with feedback requests or future offers.

9 DON'T BUY TECH THAT LOCKS YOU IN

All your tools should be scalable, integrable, and future-proof. Avoid closed ecosystems, simple as that.

10 DON'T SKIP STAFF TRAINING

Don't underestimate your most valuable asset: your team. Your front desk and housekeeping teams must understand how your digital systems work to support guests confidently.

CONCLUSION

Don't fall into the trap of removing information when going paperless. The transformation you aim to get is about how information is delivered, at what frequency, and to which groups.

The endgame is creating a digital system to support your hospitality. To give guests instant, intuitive access to what they need, even before they know it, without adding noise, friction, or clutter to their experience.

I believe that the future of hospitality doesn't include more devices, apps, or clutter. On the contrary, it's filled with imaginative journeys, clutter-free rooms, and meaningful personalization. When done correctly, digital transformation is not about centering screens; it's about centering serenity.

And that's something every traveler can appreciate.



HYB



Hospitality Tech Doesn't Speak For Itself

Hotel Technology

Anne Bleeker

Founder and Managing Director at In2 Consulting

Let's be honest. In hospitality tech, shouting louder doesn't mean being heard. You can have the best product, the most visionary team, and the slickest interface in the industry, but if you can't tell your story clearly, to the right people, at the right time, you'll be stuck spinning your wheels. Strategic communication isn't just about press releases and buzzwords. It's about translating complexity into clarity, turning technical features into business value, and building a brand people actually trust. Whether you're courting investors, selling to hotel operators, or rallying your internal team, great communication is your unfair advantage. And in a noisy, crowded, fast moving market, it might just be your most important one.

Too often, strategic PR and communication is treated as an afterthought by hospitality tech companies, or it's merely used as a tactical tool to generate buzz or get media attention. The truth is that a communication strategy is not just window dressing, it's a growth engine that can help you rise above the noise, scale faster and grow with purpose.

Technology vendors in hospitality build and sell complex products to a very diverse audience, from tech-savvy IT directors and business-focused operations managers to procurement teams and corporate executives. In addition, tech vendors need to get their message across to investors, employees, the industry, and even end-users, in good times and bad. Each group speaks a different language and cares about different outcomes. With the myriads of communication tools available, it can be overwhelming to select the right ones, and a lot of time is wasted shouting into the void. A well-crafted communication strategy helps to pick the right messages for the right audience at the right time, using the most effective tools and channels to turn complexity into clarity and noise into engagement.

YOUR PRODUCT MEANS DIFFERENT THINGS TO DIFFERENT PEOPLE

Hospitality tech is becoming more complex and the tech space increasingly crowded, making it harder to stand out. Companies often focus on the amazing product they have developed and the features they offer, and while one audience gets excited about the latest technical bells and whistles, others will be more interested in the business problem it solves or the investment potential it has.

The sales cycle of hospitality is long and involves many different stakeholders. A new PMS, for example, may solve the issue of an end-of-life technology for the IT director, signify a cost saving opportunity for the general manager, an operational expense for the finance team, while for the corporate office it is an opportunity to finally get the customer data from multiple hotels in a single place. To take it a step further, the tech company's employees may see the new PMS as an interesting innovation to work on while potential investors want to know how fast it can scale. Just presenting a great new PMS is not going to satisfy any of them. Effective communication means mapping out the information for different stakeholders and crafting tailored messaging for each. Those messages need to speak to their needs, not yours.

GETTING YOUR CONTENT IN FRONT OF THOSE THAT MATTER MOST

In a world inundated with information, it is essential to rise above the noise and capture the attention of those that matter most to you and your business. To stand out, hotel tech vendors must stop thinking like product marketers and act more like industry thought leaders. This means creating expert content that educates, engages, and drives meaningful discussions, not just promote a product. If done well, thought leadership helps build credibility, rapport and trust with your audience and industry peers and enhances and protects the reputation of your business.

In this crowded industry and media landscape, simply creating high-quality content is not enough, it's about getting the right content in front of the right people at the right time. This means understanding what newsletters your audiences read, podcasts they listen to, identifying the most relevant industry publications, and knowing what analysts they trust. As everyone can create and publish content about almost anything now, it has lost its value as a standalone tool. To stand out you need to engage with your audience, build trust and add value.

AS COMPANIES SCALE, COMMUNICATION NEEDS TO EVOLVE

A common pitfall for startups is the late consideration of PR & communication. They often prioritize commercial aspects, product development or market entry, leaving communication as an afterthought. However, strategic communication is an integral part of the overall success of any venture. It encompasses the product or service itself, the leadership, and the story behind the organization.

Startups need to translate technical language into compelling narratives for investors, partners, and non-technical buyers. During funding rounds, visibility of the founding team becomes a key differentiator. Investors don't just back tech, they back people and invest in the vision and the team driving it, making the positioning of founders a critical aspect of your PR. The key is to make investors believe in you, not just your tech. Communication tactics like thought leadership, LinkedIn presence, and speaking engagements not only get your message out but create trust.

When launching new products, tailored messaging, media exposure, and industry association engagement can help turn innovation into investment. Especially in the early stages, strategic communication can support the road to scale-up funding.

When entering new markets, it's important to demonstrate how the company supports a specific region or segment, which should be done through exposure to key decisionmakers, visibility in local media, and speaking opportunities at key industry events, amongst others.

For mature tech companies, communication is how you stay relevant. Momentum is maintained by demonstrating ongoing innovation, thought leadership, and a clear vision for the future of hospitality.

Whether it's showcasing sustainable initiatives, new AI capabilities, or global expansion, every announcement should connect the dots between tech and business value. This is how you keep your brand top-of-mind with buyers, analysts and partners.

Across all stages of a business, one constant remains: tech doesn't speak for itself. Business decision-makers respond to clarity, relevance, and human connection. The companies that win are those that own and tell their business story; why you exists and how you're changing the face of your industry through innovation.

AND DON'T FORGET YOUR TEAM

In fast-moving technology companies, internal communication isn't just about keeping teams informed, it's a strategic driver of alignment, productivity, and culture. With cross-functional teams often spread across geographies and time zones, effective internal comms ensures that everyone – from engineers and product managers to marketers and customer success teams – understand what the company does, and more importantly, why it matters and to whom.

In a tech company's early- or growth stages, internal comms is fundamental to building a cohesive culture. Values, vision, and strategic priorities don't spread by chance, they need to be clearly articulated and reinforced through consistent internal messaging. Especially in hybrid or remote-first teams, intentional communication is what keeps people connected to the company's mission and to each other. When done right, a solid internal communication strategy can help you turn your entire workforce into your most powerful advocates.

WHAT TO DO WHEN THINGS GO WRONG?

In the world of technology, crisis communication is crucial. From data breaches and service outages to ethical controversies and regulatory challenges, tech companies face a unique set of high-velocity, high-visibility risks. How a company communicates in the face of adversity can shape public perception, user trust, and long-term brand equity.

What sets crisis comms in tech apart is the speed and scale at which issues can escalate. A bug or security lapse can affect millions of users in minutes, and the story can go viral across social media and news outlets just as fast. Having a clear, well-rehearsed crisis communication strategy ensures that the company can respond quickly, factually, and empathetically without getting defensive or losing control of the narrative. Crisis comms done well can turn a major issue in an opportunity to engage and build trust.

HOSPITALITY TECH CANNOT SPEAK FOR ITSELF, BUT YOU CAN

PR and communication is not just about generating buzz or getting media coverage. It is a strategic discipline that requires a deep understanding of your objectives, values, and target audiences. It is a guiding force in a cluttered media landscape which enables organizations to rise above the noise, build their brand reputation, and drive sustainable growth.

Whether you're building the next AI-powered concierge or reinventing the booking stack, remember that the value of your technology only becomes real when it's understood and believed by the people who matter and that's what strategic communication delivers. Not noise. Not fluff. But clarity, trust, and momentum. Hospitality tech may not speak for itself, but smart, thoughtful communication ensures it gets heard.



HY8



The Next Service Era: Hospitality Boosting Through Automation and Digitalization

Operations

Prof. Dr.-Ing. Vanessa Borkmann

Research Director and Head of the FutureHotel Innovation Network at Fraunhofer-IAO in Stuttgart, Germany

Hospitality is undergoing a fundamental transformation – driven not only by digitalization and artificial intelligence, but by a new understanding of what human-centered service means in a tech-enabled world. Based on insights from the FutureHotel Innovation Network at Fraunhofer IAO, this article explores how hotels are shifting from standardized procedures toward more adaptive, emotionally intelligent service models. Automation is not replacing humans – it's freeing them to do what they do best: create genuine, meaningful guest experiences. In this new era, technology doesn't undermine hospitality's human core; it enables its renaissance.

Based on research from the FutureHotel Innovation Network.

Hospitality service, long known as “*a people’s business*,” is entering a transformative phase – one that’s powered by technology and digitalization. As Artificial Intelligence (AI) and automation gain momentum across the industry, we’re not only looking at faster check-ins and smarter booking tools, but also at a fundamental shift in how service in hospitality is conceived, delivered, and experienced.

This shift brings with it a growing unease: the widespread fear that front-line employees could be replaced by machines, and that hotels may turn into cold, impersonal spaces where efficiency trumps empathy. The idea of a fully automated, staffless hotel may seem efficient on paper, but it also risks stripping away the warmth and human touch that define true hospitality. This is a valid concern and one the industry must address head-on.

While we will undoubtedly see the rise of fully automated, staffless hotels – particularly in the budget segment – these should be understood more precisely as technology products: functional, self-contained solutions driven by operational efficiency. These differ fundamentally from the service-centered hotel products that define our industry’s core, where human-centered service remains essential to the guest experience.

In these settings, the challenge for the future hotel is not to remove humans from the equation, but to remove the robotic tasks from human roles – allowing people to focus on what they do best: creating emotional connections, offering genuine care, and enriching the guest experience in ways that no machine can replicate. Paradoxically, it is this integration of technology that is making the industry more human.

At Fraunhofer IAO, we’ve explored this transformation in depth through our long-standing FutureHotel Innovation Network – a future lab and think tank that’s been driving innovation since 2008. Our latest research, presented in studies like “*FutureHotel – AI Application Potential Along Hotel User Journeys and its Business Opportunities*,” “*FutureHotel – Employee Profiles*” and “*FutureHotel – 360 Hotel Service Ecosystem*” clearly shows that we are on the cusp of a new era in hospitality.

Traditional Standard Operating Procedures (SOPs) are becoming outdated. The rigid frameworks that once structured service interactions no longer meet the demands of today’s evolving guest expectations. AI systems – including generative AI and agentic solutions (i.e., AI that can make autonomous,

goal-directed decisions) – are increasingly taking over repetitive, rule-based tasks. In the future, we will experience not only the rise of virtual AI solutions, but also the growing presence of physical AI in the form of robots and smart devices taking on logistical, operational, and interactive tasks within hotel environments. From autonomous room service delivery to robotic housekeeping assistants and multilingual reception units, these technologies will support staff and improve operational efficiency.

As a result, human employees will be freed from repetitive tasks and able to focus on empathy, creativity, and meaningful guest and community interactions. This does not mean removing people from the process; rather, it’s about empowering them to do what humans do best: engage guests through empathy and emotional intelligence. This is why hospitality is about to experience a renaissance – not in spite of automation, but because of it.

In the future, the true DNA of hotel service – defined as the unique way a brand translates hospitality into human experience – will become one of the most decisive quality criteria and a key differentiator in an increasingly tech-driven and competitive market. But what will this service actually look like? How can we enable employees to communicate authentically with guests while still representing the hotel brand’s values and guidelines? How can employee education and service design be transformed to align with this new understanding of hospitality? These questions will become central to the work of employers and educational institutions in developing a future-ready, skilled workforce.

Simultaneously, the very role of the hotel is evolving. Hotels are no longer merely places to sleep or temporary shelters for travelers. They are increasingly seen as transformation hubs – spaces for growth, collaboration, and meaningful experiences. More and more, hotels will integrate into the fabric of local communities, offering not just accommodation but also co-living, co-working, gardening, wellness, arts, and care services. They will host events, support community development, and provide spaces that invite both locals and guests to engage and connect. This transformation calls for staff with the right mindset and skillset to elevate hotels into multi-use platforms that provide new services, business models, and revenue streams.

What’s emerging is a new spectrum of hospitality. Subscription-based models will offer ongoing access to hotel spaces and services – transforming guests into members. Digital-first services will open up new revenue streams, from virtual coaching to curated online experiences. Community-driven business models will allow hotels to monetize local engagement, co-working offerings, and hosted workshops or retreats. Even physical assets will be used more flexibly, as hotels adopt adaptive-use strategies that blur the lines between accommodation, event spaces, and local service hubs. For today’s hoteliers, this transformation requires strategic foresight, backed by ecosystems of partners and collaborators.

This moment presents a unique opportunity to redefine what hospitality stands for. The challenge is not whether hotels will adapt – but how imaginatively and strategically they will shape the next era. And the time to begin is now.

HYB



Using AI for a Personalized Approach to Elevate Hotel Services and Guest Loyalty

Guest Journey

Jason G. Bryant
Vice President, Nor1, Oracle Hospitality

ORACLE
Hospitality

The hospitality industry is undergoing a powerful transformation, shaped by the rise of artificial intelligence and the growing demand for highly personalized guest experiences. According to a recent Boston Consulting Group survey, 80 percent of consumers worldwide now expect tailored interactions. This shift is not about replacing people with machines. It is about using technology to create smarter, more intuitive service that exceeds expectations, strengthens loyalty, and supports long-term business success.

The hospitality industry is experiencing a significant evolution, driven by the integration of AI capabilities and the growing demand for tailored, customer-centric services. A recent [Boston Consulting Group survey](#) reveals that 80% of consumers globally welcome and expect personalized experiences. This evolution is not about machines taking over human jobs; instead, it's about utilizing technology to craft seamless and customized interactions that surpass guest expectations and build long-term loyalty to support your hospitality business.

With the right technology, the hospitality industry is well-positioned to reinvent the guest experience, fostering loyalty through personalized interactions.

AI: ENHANCING OPERATIONS AND GUEST EXPERIENCES

Artificial intelligence has transitioned from a futuristic concept to a practical tool that delivers tangible outcomes across industries, particularly in the hospitality sector. Hotels, for instance, are employing AI to improve the guest journey by automating and personalizing services. This encompasses streamlining check-in procedures and providing customized recommendations based on guest preferences and previous stays. Intelligent systems can process real-time data, such as flight cancellations or local events, to forecast staffing requirements and maintain smooth operations during high-demand periods. AI-powered chatbots offer immediate assistance, allowing human staff to focus on more complex, high-touch interactions.

AI is also making a significant impact on optimizing operations and enhancing guest experiences at hotel restaurants. It assists in various areas, including labor scheduling, inventory management, revenue yield optimization, and kitchen production. Predictive analytics enable businesses to prepare for busy periods, adjust staffing accordingly, and reduce food waste, resulting in a more efficient operation that benefits both the business and its customers. Additionally, AI enhances the guest experience through personalized recommendations and voice-activated ordering.

EMPOWERING GUESTS WITH CHOICE AND PERSONALIZATION

Modern consumers are tech-savvy and demand a level of control that was once unimaginable. In the hospitality sector, businesses acknowledge that guests desire bespoke experiences tailored to their unique needs. Ancillary and upgrade offers allow travelers to choose specific features like balcony rooms or pet-friendly accommodations, moving beyond standard room categories and enabling guests to

design their ideal stay. Sophisticated loyalty programs now integrate with various platforms, offering personalized perks and rewards that extend beyond the hotel. These programs partner with local attractions to provide exclusive discounts and experiences tailored to guests' interests.

The trend towards self-service options has empowered guests to customize their experiences. Kiosks and mobile ordering enable guests to personalize their orders, skip lines, and make contactless payments, often resulting in larger orders and reduced wait times. This shift not only benefits customers but also helps optimize staffing and operations.

PERSONALIZATION IN PRACTICE

To create the most contemporary and guest-centric interactions, AI is essential in assisting businesses to collect and analyze relevant data to understand customer preferences and needs. This knowledge informs service strategies, enabling hotels to deliver genuinely personalized experiences that build loyalty and create lasting memories. For example, a hotel might recommend the same suite to a couple celebrating their tenth wedding anniversary, where they spent their honeymoon, adding a sentimental touch. Alternatively, a hotel could offer a targeted upgrade to a room with a stunning city view, recalling a guest's previous appreciation for urban landscapes. These are examples of personalization powered by data-driven decisions.

AI can even predict and address guest needs proactively. By analyzing flight data, AI can anticipate potential delays and offer late check-outs to alleviate travel stress. Monitoring weather patterns allows hotels to suggest indoor activities to guests with outdoor plans, ensuring their enjoyment regardless of the weather.

It's important to note that AI is a tool to enhance staff efficiency and service quality, not replace it. While data provides valuable insights, it's the hotel staff's responsibility to use this information to establish genuine connections with guests. A warm smile, personalized greeting, and genuine concern for a guest's well-being remain crucial elements in creating lasting impressions.

By embracing data-driven insights, the hospitality industry can usher in a new era of personalized service, crafting unforgettable moments that build loyalty and ensure long-term success.



HVB



The Shape of Hospitality Tech to Come: Funding, M&A, and the Innovation Horizon

Innovation

Michael Cohen
Managing Partner at GAIN Advisors

After two decades of watching hospitality tech rise, stumble, evolve, and occasionally reinvent itself, I have learned to spot when change is more than just a new buzzword. Right now feels like one of those moments. Not a flashy revolution, but a quiet recalibration. One that is redefining how technology is funded, built, and deployed across the industry. From capital discipline to platform thinking, we are entering an era where substance finally matters more than sizzle. And if we pay attention, this shift could set the tone for the next generation of hospitality innovation.

I have spent the better part of the last two decades watching, participating in, and occasionally wincing at the evolution of hospitality technology. And if there's one thing I can say for sure, it's never dull. But something has shifted recently. Not just because of macroeconomic headwinds, although those are real, but because the fundamentals of how tech is built, bought, and backed in hospitality are evolving in a way that I think will reshape the landscape over the next five years.

Let's dig into where we are today and where I believe we're heading.

FUNDING ISN'T DEAD, BUT IT HAS DEFINITELY GROWN UP

Back during the boom of 2021, seed-stage startups in hospitality tech were raising millions with little more than a pitch deck and a bold idea. That landscape looks very different now. Capital hasn't disappeared, but it has become more disciplined. Investors are asking for actual traction, tangible value, and a clear path to sustainable growth. Honestly, I think this adjustment is long overdue.

Today's early-stage funding looks more like mature sector investing. Rounds are smaller and more scrutinized. Investors are putting a sharper focus on product-market fit, while paying close attention to cost structure and scalability. I have seen angel investors take a step back and some early-stage VCs shift attention to industries that offer more immediate cross-market potential.

Still, the hunger for innovation in hospitality remains. What has changed is the type of innovation getting attention. Tools that support frictionless guest experiences, AI-driven back-office efficiency, and sustainability tech are still attracting funding. But now, it's about offering integrated solutions that can scale across multiple property types or geographies. Operators are tired of managing a patchwork of single-point tools. Investors have taken note.

SERIES A AND B: THE MIDDLE GETS MUSHY

Getting from seed to Series A or B used to be a momentum game. Now, it's more like a gauntlet. Hospitality tech founders are facing a tough reality. The leap from a handful of beta users to meaningful market penetration is particularly difficult in an industry still weighed down by legacy infrastructure and slow change cycles.

I don't expect a flood of Series B funding rounds in the next couple of years. What I do see is a rise in strategic

partnerships, with hotel brands and large operators stepping in where traditional VC might have walked away. Operators with digital transformation agendas are increasingly acting like investors, seeking technologies that align with their five-year plans.

This shift means the "middle" of the funding funnel may not disappear, but it will change form. Instead of traditional VC rounds, we'll see more alliances and joint ventures that are less about capital and more about strategic fit. Tech companies that can drive efficiency, improve revenue per available room (RevPAR), or reduce operational headaches will continue to attract funding. But unproven concepts and gimmicky ideas won't make the cut.

M&A: FROM PANIC BUYS TO STRATEGIC CONSOLIDATION

The M&A landscape in hospitality tech used to feel like a race to appear innovative. Companies were getting acquired just to fill out press releases. That's not the case anymore. What we're seeing now is a smarter wave of consolidation.

Some of these deals are driven by survival. Startups that couldn't scale fast enough are being absorbed by bigger players. But increasingly, acquisitions are strategic and focused on ecosystem building. Private equity firms are particularly active, looking at fragmented tech stacks and asking how they can bring everything together under one roof.

In the next few years, I think we'll see more ecosystem-driven acquisitions. Private equity is no longer chasing features. It's looking to acquire foundations, then build around them. A property management system might become the core, with bolt-on acquisitions in areas like guest messaging, operations, or revenue management layered on top.

The age of disconnected point solutions is winding down. Hotel operators want fewer vendors to manage and more seamless integrations. That mindset is directly influencing both investment decisions and acquisition strategy.

PRIVATE EQUITY'S STRATEGIC PUSH

Private equity has always been a strong but quiet force in hospitality. Recently, it has become much more visible. With public markets turbulent and real estate returns under pressure, many PE firms are doubling down on operational improvement. Technology is their lever of choice.

I see two clear strategies forming. On one side, there are PE firms digitizing their current portfolios. They're introducing automation, optimizing energy usage, and improving workforce management across existing properties. On the other, some are building standalone hospitality tech portfolios. These groups want to offer software products across the industry, not just within their own assets.

Either approach will give private equity more influence over the next wave of hospitality technology. It's not just about money anymore. It's about reshaping how technology is deployed and scaled.

WHAT TO EXPECT OVER THE NEXT 5 YEARS

I won't pretend to have a crystal ball, but here are a few things I'm watching closely:

- AI will become part of the operating fabric. It won't be flashy. It will be subtle, woven into guest communications, predictive maintenance, and pricing decisions.
- Sustainability tech will draw more capital. Especially in Europe and Asia, where ESG standards are tightening, products that help hotels meet environmental goals will be seen as essential, not optional.
- Cybersecurity will become a key competitive factor. As hotels collect more personal and behavioral data, protecting that information will be crucial.
- New models of hospitality will challenge incumbents. Think modular hotels, tech-enabled lodging hybrids, or membership-driven microstay brands. These companies often design their tech stacks from scratch, giving them a major speed advantage.

ADVICE FOR BUILDERS, BACKERS, AND OPERATORS

If you are building, my best advice is to think beyond the feature. Build for platforms, for scalability, and for operational simplicity. No one is looking for another tool that solves just one thing.

If you are investing, prioritize teams who understand the grind of daily hotel operations. The strongest tech companies I have seen in this space are built by people who have spent time on-property, not just in front of a screen.

And if you are on the operations side, start treating your tech stack like a strategic asset. Map your workflows, evaluate inefficiencies, and engage with tools that reduce complexity. Your future competitiveness might depend on it.

LOOKING AHEAD: A QUIET, STEADY TRANSFORMATION

Hospitality tech is entering a new phase. One with fewer flashy launches and more thoughtful growth. The capital is still flowing, but it's more selective. The deals are still happening, but they're more strategic. And the innovation, while maybe less headline-grabbing, is becoming more impactful.

What excites me most is that technology is no longer an accessory in this industry. It's becoming part of the core strategy. The quiet transformation happening right now could end up defining the next generation of hospitality experiences. And if we get it right, I think the future looks very bright.



HYB



Shaping the Future of Hospitality: Innovations and Technologies for the Present and Beyond

Innovation

Tevfik Demirciftci
Assistant Professor of Hospitality, Colorado Mesa University

Let's face it. Hospitality isn't what it used to be. And that's a good thing. We've moved beyond bellhops and buffets as the main differentiators. Today's guest doesn't just want a clean room and a friendly smile. They expect seamless, intuitive, tech-powered experiences that feel personal without feeling invasive. At the same time, hotel teams are navigating a complex mix of pressure points, from labor shortages to cybersecurity, from contactless everything to space tourism, no less.

So where are we, really? Somewhere between disruption and reinvention. In this piece, we'll take a grounded look at where hospitality tech stands today, where it's heading next, and what it all means for the people behind the check-in desk, and the ones in front of it.

A technology-driven transformation in hospitality is taking place, driven by the developing role of technology and changing guest expectations. It has been the backbone of contemporary hospitality, advancing operational efficiency and guest satisfaction from AI-powered personalization to contactless services. At the same time, the post-pandemic stage has altered priorities around hygiene, flexibility, and enhancing trends in hybridization.

Yet this digital evolution has its parts with adversaries committing cybercrimes and the fine line between automation and the human connection. Within this framework of thought, a snapshot into the state of hospitality technology at this point covers a landscape of innovation and adaptation for pursuing excellence in guest experiences.

PRESENT: THE CURRENT LANDSCAPE OF HOSPITALITY TECHNOLOGY

Understanding the current state of innovation in hospitality technology involves exploring advancements like AI-driven personalization, contactless services, and sustainability-focused solutions that enhance guest experiences and operational efficiency.

1. TECHNOLOGICAL ADVANCEMENTS IN HOSPITALITY

Technological developments in hospitality involve AI-driven personalization, contactless services like mobile check-ins and digital keys, improved communication via chatbots, and sustainability-focused innovations such as energy-efficient systems and bright lighting. These advances develop efficiency, guest satisfaction, and environmental responsibility.

2. POST-PANDEMIC SHIFTS

For increased safety, the hospitality sector is moving to UV sanitization and air filtration technologies. Hybrid events combine in-person with virtual, and a dynamic reservation system responds to shifting travel patterns for even more convenience.

3. CHALLENGES

Digitalization also poses cybersecurity threats, balances automation vs. human touch problems, and makes training staff to use modern technologies difficult.

NEXT: EMERGING TRENDS IN HOSPITALITY TECHNOLOGY

Anticipating emerging trends like IoT, blockchain, and augmented reality to transform guest experiences and streamline operational efficiency in hospitality.

1. AI AND PREDICTIVE ANALYTICS

Advanced data analytics allows the business to forecast what guests will do and act accordingly, optimizing price and contributing to guest satisfaction and revenue. Real-time operational insights help identify bottlenecks efficiently and optimize processes, resulting in optimum resource utilization and better service for the customer.

2. INTERNET OF THINGS (IOT)

IoT changes hospitality with bright rooms that personalize temperature, lighting, and entertainment. Predictive maintenance ensures efficient infrastructure management, enhancing guest experiences and reducing costs.

3. AUGMENTED REALITY

AR/VR transforms hospitality by enabling virtual tours for pre-booking and enhancing guest experiences through interactive AR apps. These technologies help guests explore destinations virtually and access real-time information, making trips more immersive and engaging.

4. BLOCKCHAIN

Blockchain ensures secure payments and simplifies loyalty programs in hospitality. It also enriches identity verification, providing guests with a seamless and trustworthy experience while improving operational efficiency.

BEYOND: THE FUTURE OF HOSPITALITY INNOVATION

Envisioning future breakthroughs such as space tourism, hyper-personalization, and immersive experiences driven by advanced AI and metaverse technologies redefines hospitality innovation's boundaries.

1. ARTIFICIAL GENERAL INTELLIGENCE (AGI)

AGI will transform hospitality with fully autonomous guest management systems, handling tasks from check-ins to concierge services without human input. It will also enhance strategic planning by analyzing data to optimize operations and improve guest satisfaction.

2. SPACE TOURISM

As humanity ventures beyond Earth, hospitality solutions for extraterrestrial travel and accommodation will become essential. From designing space hotels to creating sustainable living environments on other planets, the hospitality industry will adapt to meet the unique challenges of space tourism, ensuring comfort and safety for travelers venturing into the cosmos.

3. SUSTAINABILITY AT THE FOREFRONT

The hospitality industry is adopting net-zero hotels powered by renewable energy, incorporating circular economic practices like recycling and resource efficiency to minimize environmental impact while maintaining excellent service.

4. HYPER-PERSONALIZATION

Advancements in technology will enable hyper-personalized guest experiences. By leveraging biometric data, hospitality providers can tailor services to individual preferences, from room settings to dining options. AI systems will anticipate guest needs before they are expressed, delivering a level of customization that enhances satisfaction and loyalty.

5. IMMERSIVE EXPERIENCES

Immersive experiences will define the future of hospitality. Metaverse environments allow guests to explore virtual hotels and destinations before booking, enhancing decision-making. Holographic concierge services will provide interactive and engaging assistance, blending cutting-edge technology with traditional hospitality values.



NHL



Strategic Foresight: Getting Ahead in Hospitality Talent Tech

Property Technology

Georges El Hajal

Senior Lecturer and Researcher at NHL Stenden University of Applied Sciences



Thinking about technology in hospitality, I often reflect on how it used to feel like something separate, an add-on. Today it is woven into everything we do, especially in something as crucial as managing our talent. And with artificial intelligence, particularly generative AI tools, grabbing headlines, we are entering a new era in how we think about and handle our people strategies.

Thinking about technology in hospitality, I often reflect on how technology used to feel like something separate, an add-on. Today? It is woven into everything we do, especially in something as crucial as managing our talent. And with artificial intelligence, particularly the Generative AI tools, grabbing headlines, we are entering a new era in how we think about and handle our people strategies.

Bringing new technology into hospitality talent management has not always been a walk in the park. Our industry's structure, including all those different owners, brands, and management models, can slow widespread adoption. But the need to invest is becoming undeniable. We need to operate smarter, engage our teams better, and prepare for a future workforce that looks different from today.

Right now, AI is already quietly making a difference. I see it improving the hiring precision, making the initial sifts through applications faster and more effective. It is helping personalize how we bring new team members on board and tailor training programs to individual needs. Think about how AI can analyze data to suggest the best internal career paths or predict who might be a flight risk so we can proactively engage them. Technology is bringing these real, present-day benefits to our HR teams.

But for me, looking ahead is the fascinating and critical part. Where is this taking us? My colleagues and I recently explored this by building future AI and talent management scenarios out to 2035. We looked at different paths: a future where AI drives peak efficiency, one where perhaps we rely too much on algorithms and lose the human touch, a scenario of slower, more cautious adoption, and, importantly, a future where humans and AI work together in harmony.

What struck me most from these explorations, particularly when talking with industry experts, is the absolute consensus on the irreplaceable nature of human interaction in hospitality. Nobody I spoke with felt AI could or should completely take over the human aspects of HR. The empathy, nuanced understanding, and personal connection truly define how we manage and nurture talent in our sector. So, while AI for efficiency is here to stay, I believe the most desirable and viable future is where AI augments human capabilities, handling repetitive tasks and providing data-driven insights so our HR teams can focus on the strategic, empathetic work that matters most.

Looking "Beyond" the immediate horizon, I think Generative AI offers a fascinating potential for strategic foresight. We even used it in our research to generate possible future scenarios for talent management. And yes, it is fast, can conjure diverse ideas, and might even suggest roles we had not thought of, like "AI ethics officers" or "employee experience designers."

But here is the challenge: while AI can generate possibilities at speed, it does not have the deep contextual understanding, the lived experience of our industry, or the ethical judgment humans possess. The scenarios generated by AI often feel more polarized, either overly utopian or dystopian, compared to the more nuanced, complex futures envisioned by human experts telling us that while GenAI can be a powerful assistant in foresight, it does not replace the need for human critical thinking and strategic vision.

This brings me to what I believe we must focus on now to prepare for what's next. We need to invest not just in technology but in our people. That means cultivating AI literacy across our organizations, helping everyone understand what AI is, how it works, and its limitations. I feel strongly that strategic foresight needs to become a core skill, teaching our teams how to think in terms of scenarios and anticipate future challenges. Ethical awareness around AI use is non-negotiable; we must ensure our AI adoption is fair and transparent and respect employee privacy and well-being. These skills are crucial, and I think our hospitality education programs need to embed them immediately.

My advice for industry leaders is this: see AI, including GenAI, as a tool to empower your people and refine your talent strategies, not just a way to cut costs. Develop clear guidelines for human-AI collaboration. Prioritize continuous learning focused on both tech fluency and essential human skills. And always, always remember that the strength of hospitality lies in its human connections; technology should enhance those connections, not diminish them. By embracing this balanced approach, I believe we can navigate the future successfully and ensure that our greatest asset, our talent, thrives in the AI age.

During the preparation of this work, the author used GPT-4o to enhance language, clarity and brevity. After using these tools, the author reviewed and edited the content as needed and takes full responsibility for the publication's content.

HYB



What Happens If You Don't Modernize Your PMS?

Property Technology

Steven Hopkinson

Senior Vice President for Asia Pacific and the Middle East at Shiji Group

Shiji

Mention PMS migration and most hotel executives will pause. It's not hesitation without reason. Shifting core systems takes time, coordination, and no small amount of budget. It impacts every layer of your operation, from the front office and housekeeping to finance, IT, and beyond. But while the disruption is real, the real risk lies in waiting too long. In a fast-moving tech landscape, staying still doesn't keep you safe. It just means you're falling behind without even noticing.

For many hospitality leaders, the mention of a Property Management System (PMS) migration brings an understandable pause. The process is known to be complex, requiring time, investment, and cross, functional alignment. It affects operations from the front office and housekeeping to revenue management, IT, and beyond. Yet, while the challenges are real, the greater risk lies in maintaining the status quo.

THE BUSINESS COST OF INACTION

Hospitality depends on consistency, but in technology, consistency without evolution can be a liability. A PMS that was cutting, edge a decade ago may no longer support the pace, scale, or complexity of modern guest expectations, a world where everything is connected and can be managed through their phone.

Older systems often lack real, time data capabilities, open API infrastructure, and the flexibility needed to support AI, driven personalization or mobile, first interactions. In practice, this limits your ability to adapt, upsell, integrate new services, or compete effectively. The result? Opportunity cost, hidden, cumulative, and increasingly damaging to reputation and guest experience.

WHAT YOU CAN'T SEE CAN HURT YOU

Legacy technology rarely fails in obvious ways. It fails in subtle ones, through missed conversions, fragmented guest experiences, and operational inefficiencies that compound over time, not to mention inability to adopt emerging tech solutions because of incompatible, slow or missing integrations.

You won't know the guest who abandoned a booking because your engine couldn't filter by key preferences or attributes. You won't recover the upsell missed because your system lacked insight into guest behavior. And you can't retain loyalty of a guest whose profile you never could keep up, to, date in the first place.

These are losses you won't find on a balance sheet, but they show up in your bottom line.

TODAY'S GUEST EXPECTATIONS ARE ALREADY AHEAD

Improving operations through automations isn't theoretical, and Generative AI is becoming the most used interface with your guests. If your PMS doesn't support dynamic integration with CRM systems, or contain superior profile management, mobile check, in tools, housekeeping platforms, maintenance case management, guest communications and follow ups, and AI, driven pricing engines, you're operating with blind spots, and guests notice.

Meanwhile, your competitors are rolling out integrated experiences that feel effortless. Your systems must be capable of keeping up, or risk falling behind.

INTEGRATION IS NOW A STRATEGIC REQUIREMENT

The properties struggling most with digital transformation are not necessarily underfunded. They're constrained by fragmented infrastructures and years of workaround solutions layered over obsolete systems. Every year of delay adds complexity. And every workaround increases the cost and difficulty of change. Today, integration isn't a convenience, it's a strategic necessity.

WAITING IS NOT NEUTRAL

Postponing change has its own costs. These include:

- Diminished guest satisfaction due to slow or archaic process
- Staff inefficiencies from manual workflows
- Limited ability to integrate new partners or services
- Competitive disadvantage in a tech driven marketplace

These are not hypothetical. They are real costs occurring right now across the industry.

THE ROI OF MODERNIZATION IS CLEAR, EVEN IF THE SPREADSHEET ISN'T

While we can model a PMS migration's expected return on investment, the cost of not modernizing is more elusive, and more damaging in the long term. Market leaders are investing in platforms that are open, connected, and scalable. They're building infrastructures that support innovation, adaptability, and guest, centric strategy. The question isn't whether to change. It's how long your business can afford not to.

A CHANGE STRATEGY THAT WORKS FOR YOUR BUSINESS

The transition doesn't need to be disruptive. With the right partner, it can be phased, strategic, and aligned with your commercial goals. We work with hotel groups globally, from independent properties to multi, brand chains, to implement modernization strategies that preserve operations while unlocking new capabilities. Because this isn't just about technology. It's about building a foundation ready for whatever the future brings.

WHAT HAPPENS IF YOU DO CHANGE?

You gain control. Agility. Insight. And the ability to shape the guest experience, not just react to it.

Transformation starts at the core, with the systems that run your business. And when you're ready, we're here to make that transformation a success.



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Maximum Occupancy - Sydney
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Smart, Safe & Sustainable Summit 2025
Fri, Jun 27, 2025
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London, United Kingdom

HEDNA EUROPE Conference 2025
Sep 9 – 11, 2025
Altis Grand Hotel, Lisboa, Portugal

FSTEC
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Gaylord Palms Resort
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Skift Global Forum
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The Glasshouse
New York, United States

NoVacancy 2025
Sep 17 – 18, 2025
ICC Sydney, Australia

International & French Travel Market
Sep 23 – 25, 2025
Paris Expo Porte de Versailles
France

Hospitality Tech Expo
Sep 30 – Oct 1, 2025
Excel London, United Kingdom

TTG Travel Experience
Oct 8 – 10, 2025
Fiera Rimini, Viserba, Italy

Travel Tech Asia
Oct 15 – 17, 2025
Sands Expo & Convention Centre
Singapore

The Hospitality Show 2025
Oct 26 – 28, 2025
Denver Convention Center
Denver, United States

World Travel Market (WTM)
London 2025
Nov 4 – 6, 2025
Excel London, United Kingdom

HOSPACE 2025
Thu, Nov 13, 2025
Royal Lancaster London
United Kingdom

NoVacancy Asia 2025
Nov 18 – 19, 2025
Queen Sirikit National Convention
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The Phocuswright Conference 2025
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**Hospitality Tech
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HYB



User Adoption Isn't Enough: Accelerate Proficiency & ROI in Hospitality Tech

Data & Insights

Melissa Jurkoic

Chief Operating Officer (COO) at Benson Consulting Inc.

For all the buzz around digital transformation in hospitality, the reality is far less polished. Technology is being bought, installed, and announced with fanfare, yet it's still not delivering on its promise. Why? Because installing tech isn't the same as adopting it. And adopting it isn't the same as mastering it.

After 25 years in the industry, I have seen the same pattern repeat: tools that should drive progress end up gathering dust. Not because they're flawed, but because we have overlooked the human side of innovation. The real challenge isn't choosing the right platform, it's building the muscle to use it well. This isn't just a tech problem. It's a leadership problem. A communication problem. A change management problem. And solving it starts with one simple shift: prioritize people first.

The gap between technology implementation and its full potential is still wide and pervasive in the hospitality industry. As a passionate technologist, I find it frustrating that this challenge has persisted throughout my 25-year career and for many years before.

Who and what is causing this divide? Everyone is playing a part.

- Buyers are making investments in technology without a playbook. They are choosing “bolt-on” solutions to solve a specific problem without a holistic view of their own tech stack and their current usage across existing solutions.
- Vendors are selling their products, but they aren’t selling the change required to reach successful adoption. The bottom line is if buyers can’t effectively adopt your solution, then you aren’t really selling them anything.

AI is widening this gap because it’s accelerating innovation faster than anything we’ve seen in our lifetimes, yet many are implementing it without strategic alignment or the expertise to optimize it for their use cases. This is where structure comes in. A well-defined framework keeps technology from outpacing adoption and ensures teams can harness its full potential. Rather than simply deploying tools, organizations need to focus on empowering users to adapt, innovate and drive real results. The A.I.M. (Align, Inspire, Mobilize) framework is built on this principle, taking a human-centered approach that prioritizes proficiency and ROI.

This article walks you through its fundamentals, showing you how to prioritize people first and what to avoid so that you can transform technology implementation from a basic installation project into a value-driven journey.

DO'S

1 PRIORITYZIE ALIGNMENT

Ensure teams have a shared vision and clearly defined goals before executing on any initiative. Start with operational pain points, not features. Align your strategy with challenges your team faces daily so you are solving real business problems.

2 COMMUNICATE CONSISTENTLY

Give everyone across the organization the context behind the change so they can appreciate the reasoning and how it affects them. It takes 20% more time to add the why, but the result is empowered employees who embrace the change and share it with others in the organization.

3 FIND CHAMPIONS

Select enthusiastic team members from each department to become system experts who can provide peer-to-peer support. Employees learn better from their peers because of shared experiences and relatability.

4 ESTABLISH PROFICIENCY METRICS

Define system-specific benchmarks for mastery at different levels. Measure adoption success and track growth with periodic evaluations tailored to the system’s unique requirements.

5 TRAIN BY MODULE

Structure learning paths by role and break training into digestible modules. This approach improves retention and allows everyone to apply what they learn with minimal disruption, so the system is both fully understood and actively used.

6 ENABLE PRACTICAL LEARNING

Develop realistic examples of how different roles will benefit from leveraging technology in their daily tasks. Create hands-on practice opportunities where team members can safely experiment with new systems in a low-risk environment with support and guidance.

7 CHECK-IN REGULARLY

Establish a regular cadence for reviewing system usage to monitor adoption and growth. Conduct periodic assessments to identify patterns where teams might be reverting to old habits or bypassing key system features. Gather feedback from users to understand challenges and provide targeted support or retraining.

8 CELEBRATE ACHIEVEMENTS

Recognize and reward team members who achieve new levels of system proficiency. When teams see their efforts recognized and valued, they are more motivated to keep exploring new ways to maximize technology’s potential.

9 SHARE SUCCESS STORIES

Highlight specific examples where improved technology proficiency led to better guest experiences or operational efficiency. Demonstrating how technology works for people rather than against them creates sustainable and positive change.

10 MANAGE THE CHANGE

Technology adoption isn't a set it and forget it process. To get real value, you need to invest time in adoption and ongoing refinement. This is even more critical with AI, which isn't a product but a process, one that requires policy, governance and education to be truly effective.

DON'TS**1 ASSUME ADOPTION = PROFICIENCY**

Avoid the common pitfall of ending support after the first system training. Without deliberate reinforcement and continuous learning, proficiency stalls leading to inefficiencies, frustrations and underutilization of the system.

2 IGNORE CHANGE RESISTANCE:

Address underlying fears and uncertainties about new technology early, particularly from experienced team members. Resistance often signals valid concerns, so listen to the worries about usability and job security.

3 OVERWHELM STAFF

Resist the temptation to roll out every system capability at once. Focus on the features that have the most impact on day-to-day tasks before expanding to the advanced capabilities. Choose early adopter groups to introduce new features gradually and minimize disruption.

4 RELY ON VENDOR TRAINING

Vendor training only provides a foundational understanding of a system's features. This often lacks the real-world context necessary to support daily use. Supplement standard training with role-specific use cases and scenarios relevant to your operations and unique workflows.

5 LET WORKAROUNDS BECOME STANDARDS

Despite how harmless these shortcuts may seem, they often mask underlying system inefficiencies. If left unchecked, they can undermine long-term proficiency. Look for patterns where the team bypasses intended workflows and address the root cause.

6 FORGET TO MEASURE BASELINE

Without a benchmark for current adoption, it will be challenging to show improvement and justify continued investment in training or optimization. Define key metrics, gather data across roles and communicate the results.

7 NEGLECT ONGOING EDUCATION

Avoid the assumption that individuals will discover advanced features on their own. If you treat training as a one-time event, you risk stagnation and underutilized systems. Plan for continuous education so teams stay current on new features and best practices.

8 ALLOW DEPARTMENT SILOS

When teams work in isolation, they develop inconsistent workflows, communication gaps and inefficiencies. Encourage collaboration across departments and create a centralized knowledge-sharing hub.

9 UNDERESTIMATE STAFF TURNOVER

High turnover can create gaps in proficiency, disrupt team workflows and slow technology adoption. Develop sustainable onboarding processes that quickly bring new hires up to speed on technology systems.

10 IGNORE FEEDBACK

Team feedback is often the missing link to unlocking greater efficiency and long-term success. They can help you find blind spots as they are the ones interacting with the system daily. Solicit feedback regularly, act on feedback quickly and close the loop with the team to share how their suggestions have influenced changes.

CONCLUSION

The A.I.M. Framework shifts hospitality technology adoption from a technical hurdle to a people-first strategy. By aligning tools with operational needs, inspiring teams to truly master their systems, and mobilizing them with structured support, the hospitality industry can finally bridge the gap between investment and impact.

Success in hospitality isn't about having the newest tech; it's about making it work for your team and guests. Stopping at user adoption means missing out on the full potential of technology. Adoption is the starting point, but real results come when teams gain proficiency. When technology is mastered, it stops being just a tool and becomes a business driver improving efficiency, service quality and profitability.



HYB



Guest “Experience” is the New Currency: Benchmarking That Moves the Hospitality Needle

Guest Journey

Ryan King

Senior Vice President for the Americas, Shiji Group

Shiji

In hospitality today, what matters most cannot always be seen on a checklist. The guest experience has become the defining product, shaped not just by the room or the view but by every moment of interaction and ease. A warm greeting, a seamless digital check-in, a timely response to a simple request. These are now the hallmarks of value. As expectations rise, so does the need to measure what truly moves the guest. This is where guest experience benchmarking steps in, not just as a performance tool but as a strategic lens for building loyalty, trust and lasting impressions.

In today's hospitality landscape, the guest experience is no longer a by-product of operations, it is the product that matters the most. The value of a stay is now measured less by amenities/hard goods and more by how a guest feels. Frictionless check-in, a kind smile, or a prompt response to a guest message on WhatsApp or text message can mean the difference between a returning guest and a lost opportunity. This shift has redefined benchmarking. It's no longer about performance metrics; it's about measuring the guest experience in ways that actually move the needle.

WHY GUEST EXPERIENCE BENCHMARKING HAS BECOME ESSENTIAL

Modern travellers expect more than efficiency, they expect empathy. According to PwC, nearly a third of customers will walk away from a brand they previously liked after just one negative interaction. In hospitality, the cost of that disconnection is steep: fewer bookings, weaker word of mouth, and diminished lifetime value all impact the long-term RevPAR Index.

Recent data reinforces this. Between Q1 2024 and Q1 2025, over 10 million guest reviews were analysed across 11,200 hotels. While overall review volume rose slightly, the tone of those reviews shifted. Improvements were seen in areas tied to human interaction, particularly guest comments about staff and service. These improvements were modest but meaningful, pointing to rising expectations and better delivery on emotional value.

However, the same data showed that negative feedback remains persistent in certain areas, especially around cleanliness and room quality. This highlights the dual role of benchmarking: it's not just a performance tracker, it's an early warning system for guest dissatisfaction.

A SHIFT FROM SCORES TO SENTIMENT

Benchmarking is evolving from numbers to nuance. Guest experience-focused benchmarking now analyses what guests are actually saying, whether in public reviews, post-stay surveys, or direct feedback. And the strongest positive signals come from human touchpoints: service delivery, communication, and staff behaviour. These aren't just abstract values, they're measurable indicators of how a property is experienced emotionally.

Hotels with faster response times and higher engagement on review platforms, especially in the luxury segment, are seeing noticeable improvements in sentiment. Guests not only expect feedback to be acknowledged, they now expect it to shape

future stays. That's why response time and tone are becoming benchmarks in their own right.

BENCHMARKING ACROSS THE GUEST JOURNEY

Today's guest journey plays out across more than just the property. From booking engines and mobile apps to social platforms and digital surveys, the guest experience starts long before arrival and extends well past checkout. In Q1 2025, over 60% of global guest reviews came from just three platforms: Google, TripAdvisor, and Booking.com, each increasingly driven by experience-related content rather than facility checklists.

Hotels that benchmark across these channels gain a clearer picture of what guests value, and where breakdowns occur. With nearly 92% of post-stay surveys completed in the same period, it's clear that guests are willing to share, if the feedback loop feels responsive and relevant.

ANTICIPATING GUEST EXPERIENCE GAPS BEFORE THEY EMERGE

One of the most valuable uses of guest experience benchmarking is prediction. Properties that anticipate where the guest experience breakdowns are likely to occur, especially during high occupancy periods, can make small operational adjustments that have a large impact on guest perception.

The data shows that guest satisfaction tends to dip slightly during peak periods unless service levels are actively managed. In regions with lower growth in review volume, satisfaction levels still improved, suggesting that steady volume with consistent service often delivers better results than scale alone.

This predictive approach helps operators plan staffing, streamline service processes, and respond before issues escalate. Guest experience benchmarking, in this context, becomes a planning tool as much as a feedback mechanism.

SHARING GUEST EXPERIENCE INSIGHTS BEYOND THE EXECUTIVE TEAM

The most effective benchmarking strategies don't just sit in monthly reports, they're put into action daily. Hotels that distribute guest experience data to on-the-ground teams see measurable results. When housekeeping, front office, and F&B teams have visibility into what guests are saying today, not just last month, they can adapt quickly and directly.

In Q1 2025, improvements in response rates and service consistency were linked to properties where review feedback was made available across departments. This shift towards democratised data is crucial. Guest experience, after all, is delivered in real time, and that's when the data should be used.

LOOKING AHEAD: GUEST EXPERIENCE AS A STRATEGIC ASSET

Guest experience is no longer a soft concept. According to Bain, increasing guest retention by just 5% can lead to profit gains of up to 95%. That level of impact demands serious attention, and serious measurement.

In future, guest experience will be treated not just as an operational metric, but as a brand equity indicator. We're likely to see more hotel groups publish experience indexes, not only to differentiate themselves, but to demonstrate alignment with ESG goals, inclusivity, and emotional well-being.

FINAL THOUGHT

The Reviewpro Q1 2025 Guest Experience Benchmark report, spanning millions of mentions and reviews, makes one thing clear: experience is measurable, and its value is rising. Hotels that understand how to track, compare, and act on the guest experience will not only improve their service, they'll strengthen loyalty, reputation, and revenue.

“Experience” is the new currency. And benchmarking is how we assign it value.



Powering hospitality around the clock

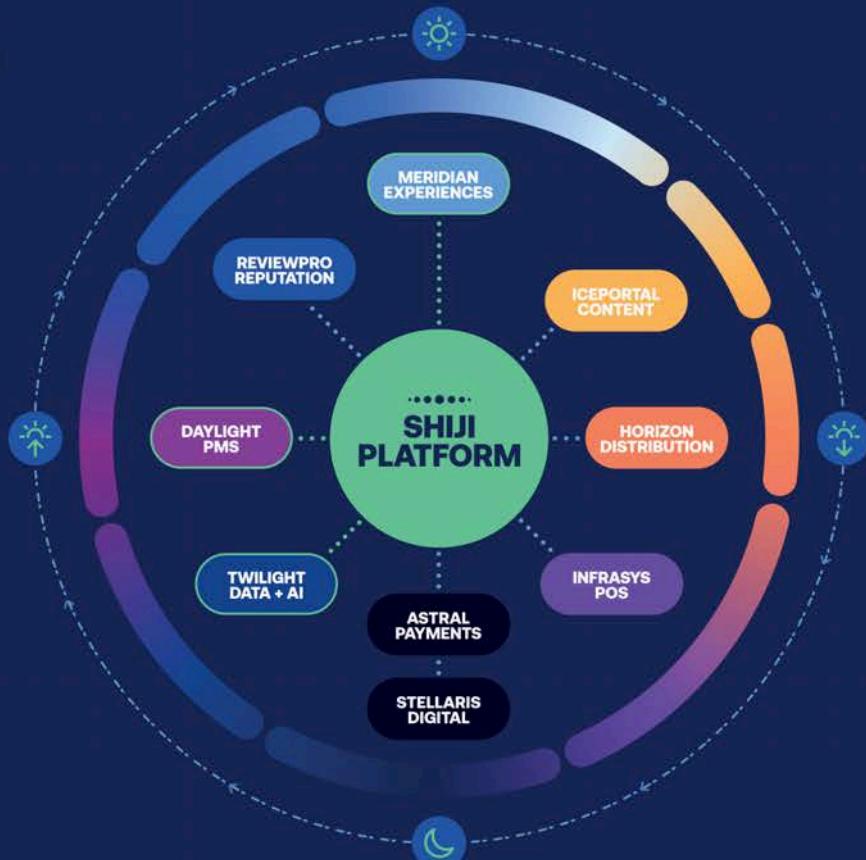


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Our deep industry expertise and cutting-edge technology empowers the world's most demanding hotels to elevate the guest experience day and night.



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HYB



Best Check-in? No Check-in!

Guest Journey

Dr. Andreas Krobath
Owner Absolute Future

It's 2025. You can fly across the Atlantic, binge watch a series at 30,000 feet, call a ride with a tap, and unlock your front door with your phone. But step into many hotels and suddenly it's like the future hit pause at the front desk. The check-in process, still clunky, still manual, still weirdly sacred, somehow remains frozen in time. And the most ironic part? We keep calling it "hospitality."

Imagine you bring a time traveler from 1925 on a journey today: even if they are rich and quite experienced, they would be totally flabbergasted! Cross-Atlantic flight, entertained by Netflix, checking for an Uber after landing, directions on Google Maps, posting a selfie on Instagram in front of the hotel, going to reception – and then, for the very first time, our time-traveler would say: “Well, this I know, this is a hotel check-in, only the key looks a bit strange.”

How come, now in 2025, this check-in process is still so resistant against change?

Essentially it comes down to complexity, bad execution and a big misconception.

THE MISCONCEPTION

A common argument against a more digital check-in process always was (and often still is): “*We are in the hospitality business. We want to keep it personal.*”

Excuse me? This is the reason why you let me wait in line and then make me feel like I’m applying for a loan? Let’s sort things out a bit. There are two main, but immensely different aspects of a check-in:

1. **To provide a warm welcome** – like it would be if you invited some distant relative to your home! Being friendly, smiling, showing around, answer questions, giving tips for what to do in the surroundings, offering a drink, helping with the luggage – things like that, aka human hospitality.
2. **To conclude admin tasks** – filling and signing a registration form, depending on the country rules checking ID, making payment/provide a CC, preparing and handing over a keycard ...

Depending on the brand and positioning of the property, the first could be a very important part of the whole experience (eg. most luxury brands) or be almost non-existent (some economy brands, holiday homes).

The second is just a painfully time-wasting nuisance. Unfortunately, it must be done. But, why oh why, by blocking staff members and exactly when I finally arrive at the hotel?

There are so many much better occasions for me to handle the purely admin part of the check-in, either on the way or at the latest (and at least autonomously finalized) at a self-service terminal to receive a key (providing an NFC key into my apple/google wallet would even be better, thank you). And honestly, wasting those ever more expensive (and hard to find) employees’ time for tasks adding zero value for the guest is no longer sustainable. Or to put it another way: when have you denied the last well trained and empathetic applicants for reception night shifts? Exactly.

COMPLEXITY AND BAD EXECUTION

To be fair, many hoteliers are very aware of this misconception and would love to remove everything transactional from the welcome experience. The harsh reality is it is damn hard to do.

Booking might be with a third party, regulations for registration vary from country to country, payments options are plentiful, invoices must be split, different PMS systems communicate with different door lock systems to create (and share) keys and sometimes the elevator demands to be integrated as well to bring up the guest to the right floors. Take a small chain with properties with different tech stacks in several countries and you quickly realize why there is no easy solution covering all this. This needs true experience and know how, which fortunately is available in the market. Choose partners with deep domain expertise in connecting systems, who are able to tame the messy beast that is the hotel tech stack. And btw, being flexible in optimizing your own processes doesn’t hurt either.

The second challenge is, implementing all this in a truly user-friendly way. Everybody has experienced self-service options in various fields – ATMs, gas stations, pay stations in parking garages, ticket machines, airline check-in, etc. And yes, everybody has experienced almost comically bad executions of such services.

But the thing is, it can also be done in a “*don’t make me think*”-like self-explanatory, fast and smooth way. If done so, it gives the guest more control and flexibility while taking away effort from the hotel.

The reality is, the best check-in process is just no check-in, but a pure welcome instead. Living in 2025 I am sure this is possible.



HYB



Technology Mindset

Hotel Technology

Ian Millar

Senior Lecturer Information Technology at EHL Hospitality Business School



As the hospitality industry stands at a crossroads between tradition and innovation, Ian Millar—Senior Lecturer in Entrepreneurship and Innovation at EHL and a leading authority in hospitality technology—invites readers to rethink long-held assumptions about the guest experience. Drawing on his dual expertise in hospitality and information technology, as well as his experience advising hotels and technology startups worldwide, Millar explores how a technology mindset is not only compatible with great service, but essential for meeting the evolving expectations of guests in 2025 and beyond.

"Hospitality is a people business." This has been the mantra of the hospitality industry since the dawn of time. I am not suggesting that we replace the human element in hospitality, but we do need to drastically rethink what makes sense in 2025 and beyond.

In this short article, I kindly ask the reader to challenge themselves and truly consider: does what we are doing still make sense? There are many areas where rethinking our approach is necessary, but for the purposes of this article, I will focus on just a few. The first is *"automation."* This topic was recently discussed in my class with master's students, most of whom are working professionals in the industry. Once we sat down and started to answer a simple question, it was incredible how many examples emerged. The question was: *"What could be automated or handled by the hotel guest themselves?"*

The most obvious example is hotel check-in and check-out. To anyone who says this is an essential part of the customer experience, I would argue otherwise. Check-in is a transaction that, in its current form, should not happen. Consider the airline industry. I imagine most readers have flown and used an airline app in the process—even in business class. You book your seat, check yourself in, choose your seat, and so on.

Now, imagine the airline took that away and you had to return to the old way: arriving at the airport three hours early, waiting in long queues at the check-in counter, and only learning your seat assignment at the counter. Why don't we offer this same choice to hotel guests? For those who want it, let them have it.

It is not detrimental to your hotel to give guests the choices they want. On the contrary, it improves how they perceive you. So, would it really be wrong to see a check-in kiosk in a 5-star hotel? To me, it would not. You give the choice to guests who want to use it. Guest interaction during the stay, which has traditionally been dominated by the concierge and phone calls, is and should be moving to a text-based option—but again, only for those guests who want that choice. With improvements in AI, especially in language nuances, the next step after simple text will be native conversations with AI agents in your own language. We are not far from this at all.

Some might say this is too much technology and could confuse guests. I would say it is not—if done correctly. If processes are communicated clearly and staff understand them, it will not remove staff from their jobs; it will free them from cumbersome manual processes we have always done. For the guest, it needs to be the *"WhatsApp experience"*: seamless and frictionless. Ask yourself, *"How many hours of training did you need to learn how to use WhatsApp?"* The answer is probably zero.

That is the same mindset you should take when it comes to the guest technology experience.

The above are just a couple of examples where technology choice matters. Maybe, when you have a minute, sit down (ideally with your staff) and think about what could be automated without any negative impact on the customer experience. I bet you can think of many things. As the industry struggles to find frontline staff, especially in rooms division and F&B, is this not the perfect time to start addressing these issues?

But for this to happen, we need new leadership skills as well. We need more *"technology mindset"* people at the decision-making table. The role of the IT director must move beyond simply keeping the servers running to a place of leadership, where technological knowledge underpins company strategy. If your hotel has a board of directors or advisors, go and count how many technology people are there. If the answer is zero, you know what to do.

Now, you may be asking about the cost associated with all this technology. I would respond: what is the cost if you do not keep up with customer expectations? The world is changing fast; you can't afford to be left behind. And if you're thinking, *"I can't afford this,"* I kindly ask you to calculate how much you spend putting chocolates on pillows over a year.



HYB



Wellness Experience Data as a Goldmine for Real Hospitality

Guest Journey

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It's easy to think wellness is just another bolt-on, like bath salts or green juice in the minibar. But the truth is, wellness isn't just a trend. It's a trillion-dollar shift in how people travel, spend, and stay. And if you are in hospitality, it's your business to care. Not just in the fluffy "feel good" sense, but in a data-driven, revenue-boosting, loyalty-building kind of way. Because when guests start choosing hotels based on how they feel after check-out, you will want to be the one showing them measurable results.

It's often said that there are three main markets that will always exist: health, wealth and relationships. Luckily, this is exactly what hospitality does! But what does it mean to actually care for our guests' health?

This is where the prospects for wellness (the product) and wellbeing (the result) come into play. In the era of 'data is the new oil', the proper use of data related to how guests interact with wellness products or amenities will thus play a role in everything from itinerary design that boosts ancillary spend through to giving guests a baseline universal metric – for example, measuring heart rate variability (HRV) as a proxy for chronic stress and elasticity of blood vessels – by which to show health improvements after each visit to therein induce a follow-up booking.

Wait a minute: why care about using wellness data when your hotel is still struggling to get its primary business data under wraps? You're not wrong in thinking this, but please understand that wellness is truly a trillion-dollar opportunity for the hospitality industry as the above benefits have hinted at.

To illustrate why, just think about the last time you were sick. In that moment, you didn't care about what's in your email inbox, upcoming meetings, projects due, your drivetime commute. All you cared about was getting better.

Much like how the best advice for equity investing is to protect your downside, there's now an insurmountable pile of evidence to show that certain lifestyle adjustments work as preventative medicine to stave off illness or allow you to bounce back quicker. In a reductive sense, one of the goals of every sauna session, supplement or salad you eat is to boost the immune system so that the chances of a pathogen breaking through into a full-on disease are minimized.

Once you drink the wellness Kool Aid and realize that constantly engaging in wellness activities is your best bet to safeguarding against illness, there's no going back. The benefits from wellness are simply too enormous: you get sick far less often, you're less groggy in the morning, you're smarter, you're stronger, you suffer less lower back pain, your mood is brighter and you possess, in a word, more vitality.

A key word to pick out here is 'constantly'; wellness is about lifestyle and repeat activities. All the better for hotels because this means repeat revenues!

As more and more people embark on their own wellness journeys, they will increasingly start to choose their hotels according to what wellness amenities they have onsite, either by opting for destination properties or by paying a premium for wellness products (higher room rates or boost to ancillary

spend). The TAM is there, but this brings us to another interesting question: how we do use data to reveal who are wellness guests are to inform repeat stays, lookalike marketing or capital investments?

As immediate next steps, it's first about ensuring you are effectively merchandizing your wellness experiences across the entire guest journey. This requires a lot of thought by the commercial team for everything from digital marketing and packages through to prearrival upselling and availability onsite. And FYI: wellness is for groups now, too!

This digital footprint can include multivariate testing of offers, an intake survey asking guests what they want from their stay, group class signups or even when the gym facilities are accessed via keycard. Next, all this data should have some mechanism of extraction into the data warehouse so that it can be merged into the guest's CRM profile or left as raw for later computations by some form of agentic AI that will emerge in the next two years.

Yes, integrations are a pain to build and anything but a pleasure to uphold, but knowing what spa treatments are being purchased and activities are being requested goes a long way towards incremental improvements from the perspectives of RevPAG (per guest) and, ultimately, the reason why guests are choosing your property over all the others in a given location (and willing to pay above-market rates). Of course, all that data is also gold for ML.

Let's end with a real-world example that represents the current platinum standard for using wellness data. With two locations in Alicante, Spain and Cancun, Mexico, SHA Wellness Clinic specializes in preventative health and detox retreats sold in 7, 10 and 14 night packages that include diagnostics, medical consultations, physical fitness sessions, personalized meal plans, hydrotherapy, traditional spa services and plenty more.

This already involves a ton of data in terms of scheduling all these treatments with various onsite specialists as well as securely storing the actual medical data in the cloud. Recently, though, SHA has partnered with WHOOP, an armband that tracks blood pressure, heart rate, blood oxygenation levels, the aforementioned HRV and other metrics on a 24/7 basis in order to give a person more insights into how well they are recovering during sleep or what's elevating their stress levels during the day.

What this partnership involves is the one-way extraction of WHOOP monitoring data into SHA's own systems so that the medical team can make adjustments on the fly to the guest's complex itinerary. Didn't sleep all that well? Maybe push the plyometrics training to the afternoon. Showing signs of needing more time to recover from a workout? Add more protein to each subsequent meal.

These are the basics, and you can get more granular towards optimizing the body and the mind, but only once you have the data. SHA may be a medical wellness center and thus a highly defined niche of the market, but it speaks volumes for where our industry is headed as these technologies reach wider adoption. Fortune favors acting sooner rather than later.

HYB



Infinite Hospitality: How Tech is Driving The Era of Property Convergence

Property Technology

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Julius A. Anders

General Manager DACH at Numa Group



Hospitality is no longer defined by the type of key handed over at check-in. Whether it is a hotel room for two nights, a short-term rental for a week, or an extended stay that blends work and leisure, today's guests move fluidly between formats. What they expect in return is simplicity, consistency, and digital ease. The convergence we are seeing across property types, guest segments, and operating models is not a trend; it is a structural shift. And behind this shift is a pressing question for operators: can your tech keep up?

The once rigid lines that separated hotels, serviced apartments, short-term rentals, and extended stays are today blurrier than ever. Guests now move fluidly between these formats, expecting consistent, digital-first experiences and flexibility regardless of accommodation type. This convergence – of property types, lengths of stay, guest segments, and operating models – has given rise to the concept of “*infinite hospitality*”.

Multiple forces are driving this shift, including labour shortages and rising operational costs. But the most significant factor is the changing expectations of guests. Today's travellers mix business and leisure, book at short notice, stay longer, and want greater control over their experience. In response, many operators are blending their offerings. However, not all systems are equipped to support the growing complexity of use cases – which is exactly the challenge Numa Group, Europe's leading fully digitalised hospitality platform, set out to solve with Apaleo.

TECH AGILITY UNDERPINS THE ABILITY TO CAPITALISE ON CONVERGENCE

Technological agility is now essential to meeting guest needs that span multiple stay types and service levels. Operators need open, adaptable tech stacks that integrate with best-of-breed tools and support a variety of stays. This thinking led Numa to adopt an open, headless infrastructure, selecting an API-first, cloud-native property management platform like Apaleo to support its operational model. The flexible architecture underpins all key aspects of operations – from onboarding and distribution to housekeeping, guest communication, and payments. It allows Numa to operate consistently across different segments, layering additional services as needed – from fully contactless stays in budget brands to high-touch experiences in premium properties – all on one core infrastructure.

Beyond efficiency, this adaptability enables rapid, scalable growth. Since adopting Apaleo, Numa Group has grown to nearly **9,000 units** in 36 leading European cities across **15 countries** in just five years, achieving **100% year-on-year revenue growth** in 2024.

Onboarding new properties – such as the upscale hospitality brand Native Places and its more than 800 UK units – took days rather than months. With a flexible infrastructure, Numa could deliver a high-end guest experience, alongside other segments in the portfolio, without a complete system overhaul. Achieving this level of speed and flexibility would have been close to impossible with closed, all-in-one systems.

MEETING DIVERSE GUEST NEEDS WITH AGENT-LED AUTOMATION

Cost control and lean operations are critical in making convergence work – but not at the expense of guest service. At Numa, **over 80%** of workflows across housekeeping, maintenance and guest communications are **automated**, supporting a **60% reduction in operating costs**.

AI Agent-led automation helps increase satisfaction and contributes to consistently high review scores. At Numa, **65% of all guest communication** is managed by AI-driven agents, delivering instant, 24/7 support with consistent quality. The impact goes beyond reservations: Numa's AI agent reads and processes all incoming reservation emails, automatically generating quotes. This has resulted in a **70% reduction in workload** for the reservation team and a **90% improvement in response time**, ensuring guests receive answers almost instantly.

AI-driven automation is also used for proactive issue detection through review and feedback analysis, enabling instant resolution, streamlined communication, and smarter operations such as optimised room assignments and flexible check-in.

In the era of hospitality convergence, adopting technologies like AI is essential, but success depends on open systems that enable seamless integration into daily operations.

AI AS A PROFITABILITY ENGINE

At Numa, AI supports agent-led automation and data-informed decision-making. Sentiment analysis of guest reviews helps guide targeted investments, such as air conditioning upgrades, leading to improved satisfaction scores and **higher ADR**. In housekeeping, image recognition identifies whether kitchens were used, avoiding unnecessary cleaning and **saving hundreds of thousands annually**. A/B testing of features like room colour schemes allows data to shape design choices. These examples show how AI, when integrated into operations, can move beyond automation and cost reduction to drive long-term value.

In the context of convergence, operators who haven't yet begun automating are already falling behind. Seemingly marginal efficiency gains can compound significantly—every 0.1% improvement directly impacts the bottom line. The good news is that making the shift is easier than it may seem. Open, cloud-based platforms require low upfront investment and deliver immediate returns. Their strength lies in the ability to integrate and adapt a wide range of technologies within a single core infrastructure. This kind of flexibility is becoming essential to meet evolving guest expectations and operational needs.

Convergence brings both risk and opportunity. Now is the time for operators to take a hard look at whether their technology can support the complexity, speed, and flexibility that this shift demands.



HYB



Top Property Management System Trends Defining the Future of Hospitality

Property Technology

Frank Pitsikalis

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The Property Management System is no longer just the engine room quietly humming in the background. It's becoming the brain of the operation. As guest journeys grow more complex and expectations rise, the PMS is stepping out from behind the curtain and into a starring role. Not just as a system of record, but as a platform for revenue growth, service delivery, and operational agility. The real shift is not just about building better tech. It is about rethinking what the PMS is and what it needs to become. This article explores the six key trends reshaping that future and what it means for operators who are ready to move beyond the status quo.

The hospitality industry is entering a new era of innovation, redefining the Property Management System (PMS) as a strategic cornerstone rather than just a back-office tool.

Today's most forward-looking PMS providers are building platforms from the ground up, investing heavily in cloud architecture, AI, and integrated ecosystems. The result is a new generation of PMS technology aligned with the dynamic, multi-channel demands of modern hotel, resort, and food service operations. What's changing isn't just the technology, but how it's being designed, implemented, and improved by organizations focused on service delivery, operational resilience, and product excellence.

Here are six trends shaping this transformation, giving hotel operators, resorts, and service providers a glimpse of what's next.

1. CLOUD-NATIVE FLEXIBILITY WITH ON-PREMISES SUPPORT

Rather than forcing a one-size-fits-all approach, modern PMS platforms are embracing hybrid delivery models that offer both cloud-native functionality and robust on-premises capabilities. While the majority of new deployments are cloud-based, some properties, due to regulatory, connectivity, or operational constraints, still require the control and stability of on-premises systems.

The most progressive vendors now support both models without compromise, empowering operators to choose what's right for them. These systems aren't simply "cloud-compatible"; they're built cloud-first, with modular architectures that can adapt across property types and scale as needed. This shift has required rethinking the technical foundations of PMS, allowing properties to focus less on infrastructure and more on delivering exceptional guest experiences.

2. ECOSYSTEM-CENTRIC DESIGN OVER POINT SOLUTIONS

Hospitality leaders are increasingly moving away from fragmented tech stacks filled with point solutions. Instead, they're adopting holistic ecosystems where every guest and operational function including bookings, spa, F&B, events, loyalty, and mobile engagement, lives under one interconnected roof.

Properties now expect PMS platforms to provide integrated ecosystems that minimize failure points, reduce costs, and enhance the guest experience. This shift is driven by the risks

of managing multiple vendors and disconnected systems. Vendors offering purpose-built, interoperable modules gain a competitive edge by enabling more consistent service, improved insights, and stronger accountability across operations.

3. AI-POWERED GUEST EXPERIENCE AND OPERATIONAL EFFICIENCY

Generative AI is moving beyond hype and into real-world hospitality applications. In 2025, PMS innovation is being shaped by AI in three critical areas - guest experience, operational efficiency, and revenue growth.

Conversational AI interfaces can now manage bookings, spa services, and special request with human-like interactions, thereby offering personalized service at scale. Meanwhile, on the operational side, PMS vendors are embedding tools like Microsoft Copilot into their R&D workflows to significantly boost product development efficiency. And when it comes to monetization, AI-powered upselling algorithms are enabling real-time, context-aware offers that maximize revenue per guest without adding workload for staff.

4. EMBEDDED AI SUPPORT: FROM DOCUMENTATION TO DAILY USE

Product support is being reimagined as a proactive, in-platform experience. Rather than submitting tickets or scouring portals, users can now access intelligent help tools directly within the PMS interface, whether via a virtual assistant or a context-aware support hub.

These embedded tools are trained on implementation guides, operating manuals, and real-world FAQs, making it easier for staff to get quick, accurate answers without leaving the platform. By shifting support into the product experience itself, PMS providers are reducing training overhead, empowering frontline staff, and boosting satisfaction across departments.

5. SEAMLESS GUEST JOURNEYS THROUGH CONNECTED EXPERIENCES

As guest expectations grow, properties are rethinking how to deliver a more intuitive booking experience. The shift is toward seamless, end-to-end journeys where guests can book rooms, dining, spa, and activities in a single session.

Innovations in package booking technology are removing the friction of disjointed entitlements. Rather than using multiple systems or making follow-up calls, guests move through a unified flow showing real-time availability. This enhances the guest experience and boosts efficiency by reducing booking errors, increasing conversions, and freeing staff to focus on service.

6. CROSS-VERTICAL INNOVATION TRANSFER

Some of the most exciting innovations in PMS design are coming from outside the traditional hotel context. Vendors working across hospitality sub-sectors, such as cruise lines, casino resorts, and managed food services, are actively cross-pollinating their solutions.

Technologies originally built for mobile-only environments or self-service kiosks are being repurposed for broader use. For instance, loyalty systems developed for the gaming industry are being applied to hotel chains. And mobile ordering tools designed for fast-paced venues are being integrated into resort settings. This deliberate transfer of ideas allows innovation to travel faster, creating broader value for operators and better experiences for guests.

For decision-makers evaluating what's next, the direction is clear. Choose partners who understand the full guest journey, prioritize modular flexibility, and are building ecosystems, not just the systems.



Your PMS defines “okay for today” vs. “fabulous forever.” **Choose to go beyond.**

A basic or outdated PMS takes properties only so far. Versa PMS enables breakthroughs, with future-proof versatility and cloud-native flexibility without sacrificing on-premises support. Best-of-breed solutions integrate in an ecosystem for best-of-experience outcomes for guests and teams when you’re ready. See what it’s like to go beyond.



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HYB



Consulting-Dō: The Way of the Ethical Consultant (A Manifesto)

Leadership

Simone Puorto

Head of Emerging Trends and Strategic Innovation, Hospitality Net



Believe it or not, this isn't another late night monologue about AI sentience or the metaverse melting our brains. This one is about something simpler and, honestly, more urgent. It is about consulting, what it is, what it is not, and why it is time we stopped treating it like an Instagram filter for our careers. Somewhere between rooftop selfies and recycled slide decks, the core of this job got lost. So whether you are thinking of becoming a consultant or about to hire one, consider this your cheat sheet. No fluff, no pitch, just the truth.

INTRODUCTION

Believe it or not, for once, this isn't one of my rants about AI, the metaverse, or how we're sleepwalking into artificial sentience (spoiler alert: we are). This is something more basic, but in many ways more urgent. It's about the ethics of that strange thing I do for most of my waking hours. It's time to demystify consulting, because over the years, we've overglamorized the role, posting too many selfies of ourselves drinking Hemingway daiquiris on luxury hotel rooftops (JFYI: my favorite one is at the Bar Locarno in Rome, yummy!), while stripping it of any accountability. So what's the point of this piece? Well, if you're planning to become a consultant, you can use this as your baseline. And if you're a hotel or a tech company hiring one of us, treat it as your due diligence checklist, a way to make sure you hire the *right* person...

...even when the *wrong* one looks so damn good.

Enjoy the read.

1. NO COMMISSIONS FROM VENDORS. EVER.

Like *Fight Club*, the first rule is pretty straightforward: *no commissions from vendors*. Let me say this once again, slowly, so we're all on the same page: *no commissions from vendors*. Let me say it again, louder:

No. Commissions. From. Vendors. Ever.

And if you do take them, disclose it. Upfront. Because the moment money moves behind the curtain, your advice stops being *independent* and becomes *incentivized*. When I started my consultancy nearly a decade ago, I once accepted a small payment after recommending a PMS I liked to a client. It was peanuts (less than 1,000€), but it drove me insane, and I ended up donating it to charity and swore: *never again*. Since then, I've negotiated special rates with many vendors, but the discount goes ENTIRELY to the client. So, if there's one rule to follow, it's this: be a *samurai*, never a *ronin*. You don't serve two masters. You choose one. And it always has to be the client. Otherwise, go work in sales.

2. DECLARE YOUR CONFLICTS (ALL OF THEM)

This one's more nuanced, but just as essential. I sit on the boards of a dozen travel tech companies. That alone isn't unethical. In fact, if you've spent decades in an industry and companies ask for your input, it means you have a chance to (re)shape the ecosystem, possibly for the better. But influence comes with responsibility. If you recommend a tool that's even remotely connected to one of those companies, tell the client, clearly and out loud: "*I love what this company does, but just so you know, I hold shares.*"

3. GET PAID FOR YOUR INDEPENDENCE

I've been working in hospitality for 26 years. Ten hours a day, six days a week. That's over 80,000 hours. Remember Gladwell's 10,000-hour theory? I've done that. *Eight* times. I'm basically the Yngwie Malmsteen of consulting, minus the scalloped fretboard and the wig (for now).

At this point, it's no longer a job. It's an obsession. But let's not kid ourselves. If I took an executive role at any travel tech company tomorrow, I'd make triple. And yet, I chose consulting. For one reason: *freedom*. Not the stock-photo kind with a laptop and a coconut on a Bali beach. I mean real freedom. The kind that means I don't have to wear that stupid XXL branded polo at ITB like a corporate mascot. If I'm going to cosplay, I'll do it at Comic-Con. And for the record: the only logos allowed on T-shirts are from bands at concerts (and, even then, there are rules. You NEVER wear the shirt of the band you're going to see. Pick one with a similar sound... Big difference.)

So, what's the price of that independence? No stock options. No paid holidays. No corporate safety net. So when consultants quote €50/hour, ask yourself: how are they surviving? The truth is, they're not. Not without overloading, rushing, and cutting corners. And in the end, clients pay for it: in recycled strategy, shallow thinking, and consultants held together by caffeine and anxiety.

4. TIME ISN'T (JUST) FOR CLIENTS. IT'S FOR THINKING

Consultants need to be OCD about their time. *Toggl–Asana–Trello-level* obsessed. In my case, mornings are sacred. I start at 6 AM and rarely take client calls before noon, and that's when the real work happens: reading, testing ideas, talking to peers, connecting the dots. Believe it or not, *we're working for you most when we're not working for you*. So, if your consultant is jumping from Zoom call to Zoom call without a break, they're not thinking. They're reacting. James Watt (the BrewDog guy) said it best: 50 percent of your time should go to operations, the other 50 to improving how you work. That ratio applies to us, too.

5. “HYPER-SPECIALIZATION” IS A MYTH

In *The Wisdom of Crowds*, Surowiecki says that if you put a group of experts in a room, they'll converge on the same idea, not because it's right, but because it's safe. That's hyper-specialization's catch: echo chambers dressed up as strategy. Same goes for consultants who only work in one destination or one type of property, or tech vendor. They start recycling what worked before, endlessly. So, the right question isn't: "*How well do you know my market?*" It's: "*How many markets are you in?*" (And just to be clear: the more, the better.) Hyper-specialization is a comfort zone for consultants who've never worked outside their city, let alone their country. If you can build a solid strategy for a boutique hotel in Paris, a resort in Dubai, and a home-swapping startup in Mongolia, then congrats! You can call yourself a consultant.

6. GIVE CONSULTANTS PROBLEMS TO SOLVE

We're not order-takers. We're not here to execute briefs like obedient interns. So if you come to me saying, "*I want a PMax campaign for the German market,*" my honest response will start with the *F-word*. Then I'll pause and ask you to ask me the real question: "*What problem are we trying to solve?*" Because nine times out of ten, the problem you think you have isn't the one that actually needs fixing. If your consultant just nods and builds what you asked for, you don't have a consultant. You've got a *yes-man*. And good luck with that.

7. PRIVACY IS PART OF THE PACT

The best consultants I know don't have flashy websites (some don't have websites at all!) packed with case studies and client logos. Our job runs on trust, and trust requires discretion. Would you want your business strategy turned into a carousel post just to pad someone's content calendar? Don't name-drop. Don't turn client wins into personal marketing. So when a consultant says, "*I work with X, Y, and Z in your region,*" just know: the only person getting extra value from that relationship is them.

8. CONSULTANTS ARE NOT YOUR EMPLOYEES

You'd think this one is obvious. It's not. We're not extra hands. We're not here to do what your intern would, if only they had time. Treat us like temporary staff, and you'll get temporary results. And no, I don't need a *simone@yourcompany.com* email.

9. CONSULTANT'S MIND, BEGINNER'S MIND

If someone walks in with ready-made answers, run. Chances are, they've been recycling the same deck since 2019, just swapping logos and updating the footer date. I take, as usual, the Zen approach: *treat every project with a beginner's mind*. Why? Because if you flip a coin a thousand times and get heads every time, the next toss is still 50/50. Same goes for strategy. Patterns help, until they don't. If your consultant acts like they've seen it all before, they're either lying or, worse, they've stopped coming up with new solutions.

10. SAY NO

This one's tough, especially when you're trying to scale. But saying yes to everything is the express lane to burnout and mediocrity. No one needs someone who's always available. They need someone who shows when needed the most. To paraphrase Naval: you don't get paid to be *busy*. You get paid to be *right*.

CONCLUSION

Consulting isn't a vibe. It's *karate*. And like any good karate, it takes discipline. The ten points above aren't best practices, they're the bare minimum. Because let's be honest: the world doesn't need more consultants. What it needs (urgently) is fewer yes-men and more people who know when to shut up and think, and when to speak up and say no. And if that sounds like too much? No shame. Just do us all a favor...

... and slip that corporate T-shirt back on.



HY8



The Final Differentiator: Empowering Human Connection in a Tech-Driven Hospitality Future

Guest Journey

Mike Rawson
Chief Information Officer, citizenM



You can automate the check-in. You can personalize the minibar. You can even predict a guest's room temperature preference based on weather and booking channel. But unless the experience leaves someone feeling seen, none of it matters. As AI becomes the quiet engine running hospitality in the background, the real question isn't what we can do with it. It's what we choose to make visible. Because in a world where technology handles the complexity, the defining moments will be defined by something simpler: the warmth of human connection.

As we look toward the future of hospitality, two powerful forces are reshaping the guest experience via AI: *personalization at scale* and *automation at scale*. One speaks to the evolving expectations of the guest; the other addresses the operational realities faced by hospitality teams. Yet, the real competitive edge will not be the technology itself – but how it empowers *humans* to deliver meaningful, authentic, emotionally resonant service. That is the north star.

In a landscape increasingly shaped by AI agents, data platforms like the Model Context Protocol (MCP), and autonomous process orchestration, we are entering an era where nearly every friction point – booking, check-in, room preferences, upsell prompts, late checkout, even recovery gestures – can be handled quietly and efficiently in the background. The real question is: *what remains visible?* The answer must be: **the human touch**.

PERSONALIZATION AT SCALE: LETTING THE GUEST FEEL RECOGNIZED AND KNOWN

Today's guests crave recognition, not just service. They expect the hotel to remember their favorite room orientation, how they like their coffee, whether they're celebrating a birthday or a promotion. Personalization at scale is about consistently anticipating these moments – across properties, brands, and time.

With next-generation AI agents embedded in platforms like MCP, we can connect disparate systems into a coherent guest graph: loyalty data, past complaints, OTA behaviors, even dietary preferences. But the win isn't the data. The win is *how that data empowers the frontline*. When a returning guest is greeted by name and handed a ginger tea instead of being asked what they want to drink – it doesn't matter if AI flagged the preference. What matters is the *authenticity* of the interaction. The guest doesn't feel managed; they feel *known*.

That's the essence of personalization at scale: not automation for automation's sake, but orchestration in service of relevance – and delivered, crucially, by a *human* who seems to know just what you need, and when.

AUTOMATION AT SCALE: LIBERATING OUR TALENT

On the other side of the equation lies the team. Many hotels continue to fight a losing battle against margin compression, staffing shortages, and rising expectations. Automation at scale is the pragmatic response – but only if we frame it correctly. This is not about replacing people; it's about **liberating people to be more human**.

Let the AI handle 60% of the pre-arrival queries. Let a digital agent orchestrate the upgrade workflows and payment validations. Let predictive maintenance systems schedule engineering before the guest ever notices an issue.

But don't use tech to strip away human roles – use it to *remove their administrative burden*. Our future guest services associates should not be tapping through 14 fields to check in a family of four. They should be *welcoming that family*, freed from the friction of systems, and equipped with insights to engage meaningfully.

Done right, automation at scale becomes an employee engagement strategy. It says: *"We value your time. We're removing the routine so you can focus on what humans do best – connecting."*

AI AGENTS AND MCP: THE INVISIBLE HAND

The Model Context Protocol (MCP), as an emerging layer in AI architecture, will be foundational in enabling all of this. It gives AI agents the ability to reason contextually across systems, users, and histories. This means AI isn't siloed to just chatbot interactions – it becomes a silent co-pilot behind the scenes.

Picture an AI that:

- Pulls in a late-arriving guest's flight status.
- Reallocates their room for easier late-night access.
- Alerts housekeeping to prioritize readiness.
- Notifies the night manager for a quick, warm in-person welcome.

None of this interrupts the flow. The tech disappears. And in its place, what the guest sees is a smiling employee who seems preternaturally attuned. The guest thinks: *how did they know?*

That is the magic we're aiming for: **invisible tech, visible care**.

THE HUMAN TOUCH AS THE FINAL DIFFERENTIATOR

If all hotels have AI-powered orchestration, machine learning-driven personalization, and generative agents fine-tuning every back-of-house process – what's left? What becomes the final differentiator?

The human experience.

It's the way the concierge remembers your child's name. The housekeeper who notices your running shoes and leaves a towel with a note. The restaurant host who says, *"Welcome back, Mr. Leber. Would you like your usual seat by the window?"*

Tech doesn't replace those moments. It *enables* them – magnifies them.

But only if we design the system around this premise: **Hospitality is human. Technology is its enabler – not its face.**

We must train teams not just on systems, but on *empathy*. We must reward staff not just for upsells, but for intuitive care. We must build cultures where the ultimate metric is not “*time to resolution*” but “*emotional resonance delivered*.”

CONCLUSION: A FUTURE WORTH BUILDING

The hotel of the future isn’t one where robots replace the receptionist. It’s one where the receptionist becomes *more powerful, more present, more human* – because the robot took care of the rest.

The future we are building is one of *elevated humanity*, where personalization at scale and automation at scale converge to create not just frictionless journeys, but unforgettable ones.

And in that future, it will not be the software that earns the guest’s loyalty. It will be the smile, the memory, the gesture.

The **human** – augmented by AI, *but never replaced*.



HYB



The Hive Mind of Hospitality: Why Your Data Needs a Bigger Village

Data & Insights

Brian Reeves

Founder and CEO, The roomangel Foundation

roomangel.
FOUNDATION

There's no shortage of hype around AI right now. Everyone's talking, posting, paneling. But here's the thing: most of it misses the point. If you're in hospitality, the question isn't whether AI matters, it's how you make it matter for your business. Not in some distant future, robots running the lobby kind of way, but in the here and now. In the everyday moments where performance is won or lost. Because while the spotlight stays fixed on shiny AI travel assistants and chatbots with witty comebacks, the real advantage, the one that moves the needle, is quietly waiting behind the scenes.

It's the kind of AI that doesn't just talk smart. It works smart. It connects the dots, closes the gaps, and helps you stop guessing. And that's exactly what this article is about.

How do you think about AI?

There's been a lot of buzz... scratch that, a *swarm* around artificial intelligence lately, and it's easy to get lost in the noise. For hotel operators trying to make sense of it all, it helps to break things down into three simple use cases:

1. **Agentic AI**, which supports consumers – think AI-powered travel assistants booking a weekend getaway.
2. **Operational AI**, which lives in customer-facing tools like service bots and automated upsells.
3. And **Performance AI** – the underappreciated, unsung hero that essentially makes the biggest difference for a hospitality business, quietly working in the back office, helping teams become more efficient, reduce costs, and drive profits.

Let's talk about that last one.

Performance AI is where the rubber meets the revenue. But in order to benefit from it, we first need *data*. Not coffee grounds, not horoscopes, not the position of Mercury in retrograde. Data. The right kind, in the right place, at the right time.

And that's where the hospitality industry hits a wall. Because for decades, we've been living in what I call the **cocoon era** – each hotel or brand wrapped tightly in its own isolated systems, its own dashboards, its own spreadsheets, trying to survive with only a partial view of the board.

The truth is, most of us have been trying to out-analyze our competition with incomplete information. We look at rate parity snapshots, Google Analytics dashboards, or request ad-hoc reports from our revenue managers – all in an attempt to piece together the big picture. But no matter how many charts or data points we collect, we're still missing too many critical pieces to see the full view clearly.

Meanwhile, OTAs are thriving... not just because they have scale, but because they have data. **Let's admit it: OTAs know more about your guests than you do.** They mine every search, every scroll, every booking path to optimize performance in real time. Hotels, by contrast, are often left flying blind. Each brand, chain, or independent property sits on a trove of data, but that data rarely sees the light beyond internal dashboards. And there lies the problem: **data hoarding is killing hotel performance.**

RETHINKING HOTEL INTELLIGENCE, FROM SILOED TO SYNERGETIC

What if we thought of hotel intelligence not as a proprietary asset, but as a collective one? What if, instead of hoarding information in digital vaults, we built an open, anonymized ecosystem where data could be shared safely, for everyone's benefit?

This isn't fantasy. This is the model other industries already use. Cybersecurity teams share threat data across vendors. Traffic apps improve with every user's real-time input. The idea isn't new – it's just new to us.

In hospitality, every property collects different signals: pricing shifts, booking behavior, conversion trends. Alone, they're interesting. Together, they're transformative. Because **collective hotel intelligence will redefine performance, with the help of AI.** And it's not just about data. It's about *human* intelligence too. We all know that one revenue analyst with a magical Excel model or that one GM with an uncanny instinct for rate trends. What if their prompts, dashboards, and strategies could be anonymously shared, upvoted, and adapted across the industry?

And now, imagine you can ask your data questions, like, "Which OTA is cannibalizing my most profitable guests?" or "When should I drop rates to win demand, and when should I hold the line?" and get real answers, powered by shared patterns and AI.

THAT'S HIVE.

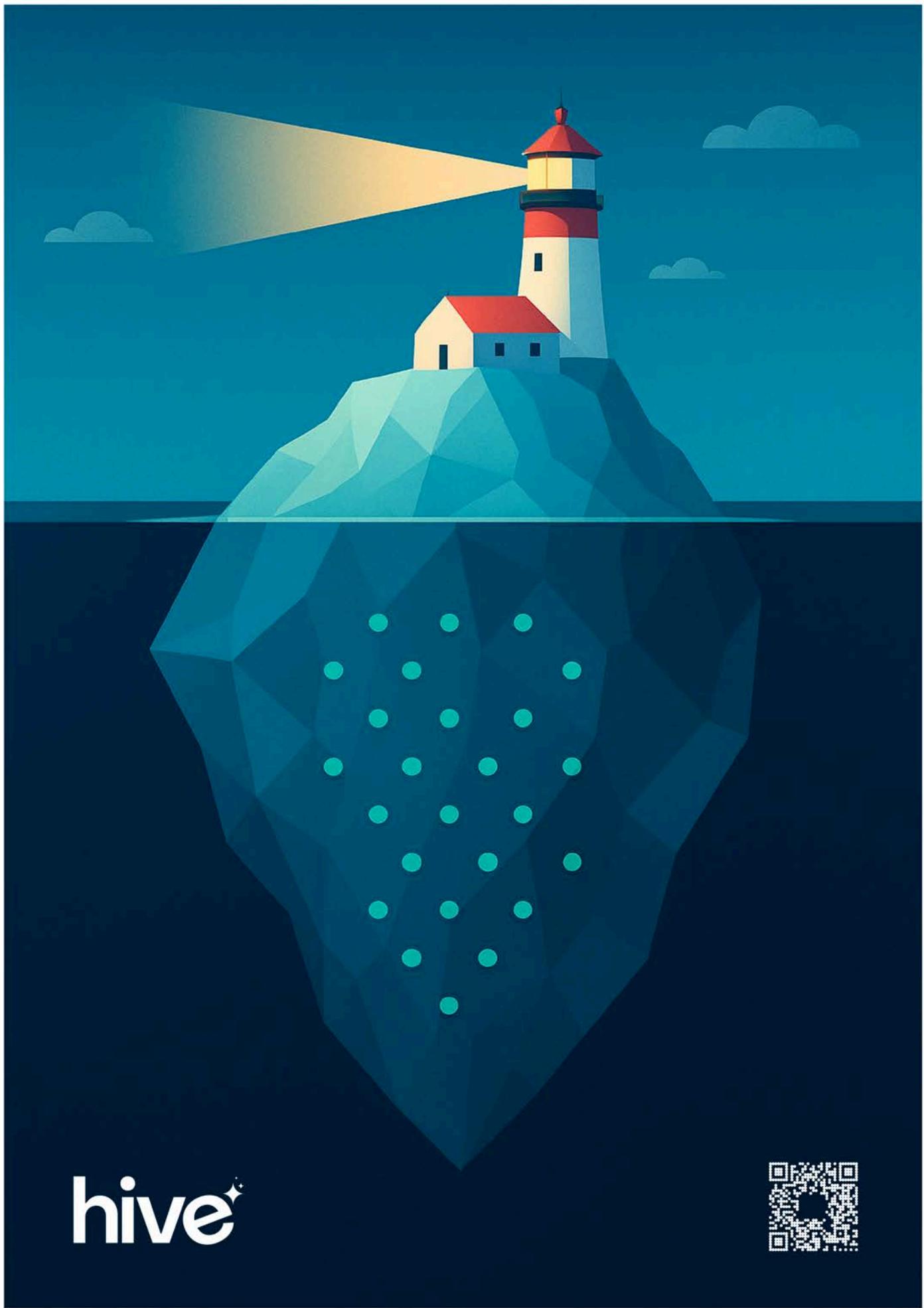
A platform-agnostic AI layer built to harness the power of collective hotel intelligence, without compromising individual privacy or strategic edge. All insights are anonymized, all contributions voluntary, and the value scales with every member who joins.

The roomangel Foundation is introducing a new solution designed around these principles. It's called... (you guessed it) **hive** – an open, collaborative, chat-based AI that aggregates rate data, performance benchmarks, marketing insights and more across a growing network of hotel participants. It's not just about benchmarking rates or tracking occupancy. **hive** connects the dots across channels: from pricing positioning to marketing demand, from search visibility to conversion. **Think of it as the connective tissue between your data and everyone else's, revealing patterns no single hotel could see alone** – patterns and data that OTAs have been using against us all along that we are now finally able to tap into.

The next five years will belong to the hotels that embrace collaboration – not because it's trendy, but because it's the only way to beat platforms that profit from asymmetry. **Intelligent collaboration is the only way to outsmart the powerful intermediaries. Period.**

The blueprint is here. The technology exists. So let's stop hoarding and let's start sharing. Let's build the future together, one insight at a time.

Your data is talking. The question is: who's listening?



hive



more than insights | roomangel.org

HYB



Why the Future of Hospitality Excellence Will Be Defined by Digital

Digital Strategy

Terence Ronson

*Hospitality Professional, Technology Consultant, Public Speaker, Inventor, and
Hospitality Technology Hall Of Fame Inductee - 2024*

Luxury in hospitality is no longer defined by marble floors or high thread count sheets. It is measured by how seamlessly your digital ecosystem meets guest expectations. The modern traveler is not impressed by a fruit basket or a bathroom phone. They are looking for instant connectivity, intuitive digital touchpoints, and a smooth journey from booking to check out. In this new era, your hotel's ability to deliver digitally is not a bonus. It is the baseline.

THE ERA OF THREAD COUNTS IS OVER. DIGITAL SIGNALS ARE THE NEW LUXURY.

I've spent my life at the crossroads of technology and hospitality, and I can confidently say this: the future of excellence in our industry won't be judged by thread count, lobby florals, a bathroom phone, or chandeliers – it will be judged by digital readiness. The modern guest no longer prioritizes a fruit basket on arrival; they expect seamless Wi-Fi, real-time communication, and a frictionless customer journey.

Yet, while guest expectations have evolved rapidly, the benchmarks of our industry have not. Too many star-rating systems, management KPIs, and internal evaluations remain grounded in an analog mindset. That's a mistake. Because the reality is stark: **your digital readiness is what makes or breaks your guest experience.**

REIMAGINING THE BENCHMARK: FROM STARS TO SIGNALS

Hospitality has long had a visual language of prestige, marked by five-star ratings, marble lobbies, high-thread-count linens, and hot and cold room service. But none of these alone meet the needs of today's digital-native guest.

We need a **new benchmark**, one that reflects how guests truly evaluate their experiences now. And that benchmark is **Digital Worthiness**.

To be digitally worthy means more than having a mobile app or a website. It means embedding guest-first digital experiences into every layer of your operation. From intuitive booking flows to intelligent room personalization, it's the cumulative impact of digital decisions that creates a sense of comfort and modern luxury.

That's why I advocate for what I call the **Digital Rating** – a simple, visual scale that captures how well a hotel aligns with digital expectations.

MEASURING WHAT MATTERS: EXPANDING THE KPI LENS

Traditionally, hospitality KPIs have focused on physical assets and operational efficiency. But it's time we expand our dashboards to include Digital KPIs – not as a replacement, but as a necessary complement to existing performance metrics.

In my view, these digital indicators are just as critical as RevPAR or occupancy rates, because they reveal the strength of your digital reputation – and, ultimately, your brand equity – in the eyes of today's digitally fluent travelers.

YOUR COMPETITORS ALREADY KNOW THIS

The digital arms race is already underway. Many of the world's leading hotel brands are actively advancing their digital readiness. The **Digital Rating** provides a structured way to benchmark your readiness against that of your peers. It enables you to assess your digital competitiveness across six dimensions that are, in my view, essential to the guest experience: Web Experience, Mobile Capability, Digital Property, Connectivity, Digital Media, and Customer Relations.

If your competitors offer smart TVs, mobile-first check-in, and dynamic guest messaging – and you don't – then you've already lost mindshare before your guest ever arrives.

I BELIEVE DIGITAL IS NO LONGER A DEPARTMENT. IT IS THE BRAND.

I've watched too many properties treat digital like an isolated initiative – one project, one app, one channel. That approach is obsolete.

Digital is your identity in motion. Guests decide where to stay based on Instagram photos, WhatsApp service response times, WeChat mini-apps, and whether your booking site loads well on their phones. Leading hotel brands are building the new hotel with "*Instagammable*" – Best Selfie spot moments in mind.

So, if you're still measuring digital success solely by what it saves you, I urge you to rethink. The more meaningful question is: **What does it attract?**

LOOKING FIVE YEARS AHEAD: A DIGITAL-FIRST FUTURE FOR HOTELS

In the next five years, I foresee that:

- **Guest expectations** will grow even more aligned with consumer tech experiences (think: AI assistants, voice commands, live language translation).
- **Digital ratings** will become as common as traditional reviews, impacting reputation and pricing power.
- **Interoperability** will define hotel systems, with seamless data flow across CRM, booking, feedback, and loyalty platforms.
- **Competitive advantage** will shift toward those with strong digital governance, not just aesthetics or heritage.
- **Sustainability** will be increasingly linked to digital infrastructure – smart lighting, occupancy-based energy management, and paperless operations will be table stakes.

The pressure is real. And so is the opportunity. The hotels that embrace this future will gain loyalty not through gimmicks, but through **relevance**.

THE “@” SCALE: A SIMPLE FRAMEWORK FOR A COMPLEX REALITY

The “@” scale is a straightforward way to express the digital maturity of a hospitality business. Here’s how it works:

- **@ - Absent:** Minimal presence; outdated or broken user experience
- **@@ - Basic:** Functional but fragmented digital tools
- **@@@ - Enabled:** App-based services and responsive guest platforms
- **@@@@ - Optimized:** Real-time, integrated experiences
- **@@@@ - Worthy:** A digital-first guest journey from start to finish

What makes this scale powerful is that it is not an audit of your IT-heavy infrastructure that the customer doesn’t see. Instead, it recognizes the digital enablement you have implemented throughout their journey with you, before, during, and after the stay. At its highest level, it defines the gold standard: a hotel built for the digital traveler of today and tomorrow.

The Digital Rating is not intended to replace your star rating; rather, it will coexist with it – and with the many other differentiation systems you’ll need to distinguish yourself in the complex market, such as ESG, environmental standards, and health certifications.

The “@” scale isn’t just a communication tool – it’s a **strategic framework**. It aligns operations, marketing, IT, and guest experience around a shared vision of digital excellence. It turns technology from a **cost center** into a **competitive differentiator and driver**.

When you operate at the “@@@@” level, you’re not just offering digital tools – you’re creating digitally enabled experiences. And that’s what turns first-time guests into lifelong advocates.

FINAL THOUGHT: ARE YOU DIGITALLY WORTHY?

Let me leave you with the three questions I always ask hoteliers in this new digital age:

1. Are you operating at a “@@@@” level – or still pretending Wi-Fi is enough?
2. Are your competitors already outperforming you in Digital Ratings?
3. Are you measuring tech success by what it saves, or by whom it attracts?

The guests of tomorrow won’t be swayed by stars alone. They will be drawn by signals of convenience, of connectivity, of care. And they’ll choose to stay with brands that understand that.

Digital worthiness is not the future. It’s the present. And it’s time we started rating it and ***Look Beyond the Stars...***

HUB



Shaping Tomorrow's Hotel: Smart and Human-Centered Innovation at Caro Hotel

Innovation

Juan Sánchez-Villar
Chief Operating Officer (COO) at Caro Hotel

I believe the hospitality industry is standing at a pivotal moment, with both the opportunity and the responsibility to shape what comes next. This future will not be defined by technology alone but by the clarity of vision we bring as hoteliers and professionals. As innovation accelerates, it is our purpose, empathy, and intent that will determine whether these tools help us build a more resilient, human centered industry or simply add to the noise.

I do believe the hospitality industry is facing a powerful opportunity – and responsibility – to reshape its future. And this future won't be built by technology alone, but by the vision we, as hoteliers and industry professionals, bring to it.

Disruptive innovation is already knocking at our door. AI, automation, human augmentation tools, digital twins – these are no longer concepts of tomorrow, but technologies being deployed today. Still, for all their promise, technologies will not transform the industry unless we apply them with purpose, empathy, and a clear vision of the role we want hotels to play in society. This, in my view, is the real challenge for smart and sustainable innovation in hospitality.

HOSPITALITY BEYOND LODGING: A SHIFT IN MINDSET

We need to start thinking of hotels not just as places to sleep, but as experience platforms, cultural agents, labor ecosystems, and even as second-level destination management players. In this sense, sustainable transformation is not just environmental – it's also social and operational.

When we speak of sustainable technology, we often think of smart thermostats and water-saving devices. But what about technologies that improve employees' health? Or tools that allow guests to meaningfully engage with their destination, thus reducing tourism pressure on saturated areas? What about platforms that allow hotels to tailor service based on each guest's unique preferences?

These are not abstract ideas – they are already being tested.

ENTER TECHYROOM 2.0: A CASE STUDY IN APPLIED INNOVATION

In Spain, the TechYroom 2.0 initiative, led by the Instituto Tecnológico Hotelero (ITH), is an excellent example of what can happen when public-private collaboration, hotel vision, and tech providers come together. In its 2025 edition, Caro Hotel, a small five-star property in the historic center of Valencia, was selected to lead the project.

Why Caro Hotel? Perhaps because its size (just 26 rooms) allows it to move quickly, or because its leadership team was willing to challenge the limits of what a hotel can be. Either way, the result has been four highly focused, deeply relevant pilot initiatives that offer a blueprint for smart, human-centered, and sustainable hotel innovation.

Let me walk you through them.

1. GUEST EXPERIENCE MAP: TURNING TOUCHPOINTS INTO MEANINGFUL JOURNEYS

The first project tackled a long-standing, low-tech interaction: the paper city map at the front desk. Traditionally, this has been a space where hotel staff mark recommendations based on informal guest conversations. TechYroom 2.0 replaced this analog touchpoint with a digital, dynamic platform.

A high-resolution touchscreen displays recommendations drawn from both internal data (hotel-curated points of interest) and live feeds from Visit València, the city's tourism authority. Guests receive not only personalized suggestions but route optimization, live booking options for restaurants and museums, and nudges toward less crowded areas – all of which contribute to redistributing visitor flows and reducing the pressure on over-touristed landmarks.

Behind the interface, a database powered by AI stores guest interactions and preferences, allowing the system to predict and propose tailored experience maps for future visitors. This is personalization with a purpose: improving guest engagement while promoting a more sustainable relationship between hotel and destination.

2. RAY-BAN META SMART GLASSES: SMARTER, HUMAN-CENTERED OPERATIONS

Back-of-house efficiency often goes unnoticed – but it's where technology can have enormous impact, especially when it enhances communication and reduces physical strain.

In this project, Caro Hotel implemented Ray-Ban Meta smart glasses for its housekeeping supervisors. These glasses allow real-time communication, task coordination, photo sharing, and voice command inputs without interrupting workflow or requiring physical displacement. As a result, team members no longer need to walk across the hotel to confirm room status, report issues, or receive updates.

The outcomes? Smoother operations, faster decisions, and most importantly, a measurable increase in employee satisfaction. Staff report feeling more empowered and less fatigued – reminding us that operational technology should never dehumanize the workplace, but rather support it.

3. EXOSKELETONS: SUPPORTING THE BODY, DIGNIFYING THE WORK

While exoskeletons are relatively common in industrial settings, their use in hospitality is still rare. At Caro Hotel, passive exoskeletons were introduced for tasks involving repetitive physical effort, especially in housekeeping and maintenance.

The benefits are immediate and multi-layered: reduced risk of injury, improved posture, less fatigue, and increased job satisfaction. For the hotel, it means fewer sick leaves and greater staff retention. For the public healthcare system, it represents a potential reduction in work-related health costs. And for the hospitality industry as a whole, it opens the door to a more sustainable and dignified future for physically demanding roles.

Technology here doesn't replace people – it protects them.

4. DIGITAL TWIN: EMPOWERING THE GUEST BEFORE ARRIVAL

The final pilot project explores one of the most promising areas in hotel e-commerce: the ability for guests to not only view rooms virtually but to select and book a specific room, with full transparency.

While digital twins are often used for design simulation or virtual tours, Caro Hotel took it a step further. Each of its 26 uniquely designed rooms was digitally modeled, allowing guests to explore them in detail and choose their preferred option before arrival. No generic room categories – just informed, empowered selection.

What does this mean? For one, it encourages direct booking, reducing dependency on intermediaries. But more importantly, it sets the stage for a new kind of guest relationship: one where personalization begins not at check-in, but at first click. From welcome amenities to in-room experience elements, everything can be adapted once the guest's preferences are known in advance.

In a future where differentiation will be a strategic necessity, this level of customization is no longer a luxury, but a competitive edge.

TECHNOLOGY IS THE TOOL, NOT THE GOAL

These projects are exciting, yes – but what makes them powerful is not the tech itself. It's the intentionality behind them. The real innovation lies in the mindset: technology is not added for show, but embedded with a clear objective – to improve the guest journey, elevate employee conditions, and promote better destination stewardship.

We all should bear in mind that smart is not about digital, it's about purpose. A truly smart hotel uses technology to serve people, not replace them.

A FEW THOUGHTS LOOKING FORWARD

If we hope to achieve a more sustainable, resilient, and people-centered hospitality sector over the next five years, we must consider a few guiding principles:

- **Every hotel has an impact.** Zero-impact tourism is a myth. But what hotels *can* do is maximize their positive contribution – economically, socially, and environmentally – at the destination level. Future regulations may well introduce fiscal incentives or penalties based on that impact.
- **People will remain our greatest asset.** Technologies will continue to evolve, but the most competitive hotels will be those that attract and retain talented individuals. Hospitality is still, at its core, a human act.
- **Sustainability requires more than green marketing.** The era of shortcuts and superficial measures is over. Guests, regulators, and staff alike are demanding real commitments, verified outcomes, and visible impact.

- **Collaboration is no longer optional.** Initiatives like TechYroom 2.0 show what's possible when public institutions, tech providers, and hoteliers align around a common goal. To lead, we must co-create.

FINAL THOUGHTS

What inspires me most about Caro Hotel's work is not the technology itself – but the philosophy behind it. A small hotel with limited resources made bold choices, not to impress, but to improve: for their guests, their staff, and their city. That's the kind of leadership the industry needs today.

We may not all have the same starting point, but we all face the same horizon. The future of hospitality will be shaped by those who are willing to rethink what a hotel can do, and who it should serve. And that future, I believe, is already being quietly prototyped in places like Caro Hotel.

Let's learn from them.



HYG



Next-gen Operational Intelligence = Operations + Business Intelligence + AI

Operations

Matt Schwartz

Chief Technology Officer (CTO), Sage Hospitality Group



Operational Intelligence in hospitality has come a long way. Business Intelligence platforms helped pave the path by giving property leaders visibility into key metrics through dashboards and web portals. But while these tools showed what was happening, they often stopped short of explaining why. That missing piece is now within reach. Thanks to recent advances in artificial intelligence, we are entering a new phase of Operational Intelligence. Property teams can now access real-time insights, uncover root causes, and take smarter actions to drive profitability and performance.

Operational Intelligence has evolved considerably over the past few decades. Business Intelligence (BI) reporting platforms played a major role in this evolution, surfacing key operational metrics from source systems to web-based dashboards. But a key element has always been missing – analysis. Now, with access to powerful AI algorithms, we are on the precipice of *Next-gen Operational Intelligence*; a future when hotel property leaders will benefit from easy access to metrics and insights so they know why things are happening and what we can do about it.

A LOOK BACK

To track key operational metrics such as Average Daily Rate (ADR), Occupancy %, Revenue Per Available Room (RevPAR), and Restaurant Covers, property leaders used to dig into systems such as hotel Property Management Systems (PMS) and restaurant Point of Sale Systems (POS). Over time, the brands, ownership groups, and third-party management companies aggregated this data across properties. This aggregated data was typically stored in databases (aka Data Warehouses, Data Lakes, Data Lakehouses) and made accessible through basic reports and financial forecasting/budgeting solutions. More recently, web-based Business Intelligence (BI) solutions surfaced key metrics to property leadership teams through web portals and mobile applications. That helped, but it didn't tell the whole story.

Say a property leader notices that revenue is up. How do we track that against benchmarks such as Last Year, Budget, and Forecast? Is that growth coming from corporate travelers or weekend guests? Did a local concert boost bookings? Is weather playing a role? Property leaders need to understand revenue by segments of guests and timeframes such as weekdays and weekends. Once you add in promotional campaigns, competitor pricing, booking windows, cancellation rates, and a myriad of other factors, it's nearly impossible to find real insights. And that's just the revenue side of the profit equation. Major expense drivers such as labor, food costs, utilities, and OTA commissions also appear frequently in owner inquiries.

BI tools are great at presenting “*what*” is happening, but they often fall short in explaining “*why*” it’s happening and what properties can do about it.

ENTER AI

Artificial Intelligence (AI) can be broken down into three main categories: robotics, natural language processing, and machine learning. Robots come in many shapes and sizes and can assist property staff with tasks such as cleaning, deliveries, and

autonomous driving. Natural language processing covers voice assistants, language translation, and sentiment analysis (e.g., guest feedback surveys). For *Next-gen Operational Intelligence*, we need machine learning – specifically Generative AI and Large Language Models (LLM) – to create this operational intelligence.

For the purposes of this article, I need you to accept two basic tenets:

1. LLMs (such as ChatGPT and Gemini) can digest large volumes of complex data and produce insights that humans may have overlooked; and
2. mechanisms exist to safeguard proprietary property data so that LLMs can safely process data without storing or exposing data for future access.

So, here's where things get interesting. Imagine taking your daily BI reports and feeding them to AI for analysis. Think of these AI models as your best financial analysts. You could ask questions about the one area property owners care the most about – profitability, and more specifically, future profitability. Questions such as:

“

Given my property's operational performance, what are the top three actions my property team can take in the remainder of this month/quarter/year to increase profitability, while maintaining (or increasing) guest satisfaction?

And imagine that the actionable insights you receive from AI are included with your reports and dashboards. Suddenly, reports aren't just a rearview mirror, they become a GPS, navigating you toward smarter decisions. Wow – a world where property leaders know what's happening and what they can do to improve future profitability – with no additional staff or time required.

WHY THIS MATTERS

We are at an inflection point in our industry when it comes to operational intelligence – we are entering an era where our reports don't just share data, they share advice. The daily reports and dashboards are about to become truly actionable; enhanced with insights not previously available without large investments in staff and time. This evolution to *Next-gen Operational Intelligence* will enable greater operational performance and increased levels of profitability – it's like having a team of PhD-level financial analysts on staff but without the salary line. The only thing standing in our way is figuring out the exact wording of our AI prompts, but that's a topic for a different article. ☺



HES



How Ready Is Europe's Hotel Industry for AI? Insights from a Multi-Country Survey

AI & Robotics

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Talk to any hotel executive today and artificial intelligence is almost guaranteed to be part of the conversation. From predictive analytics to personalised guest messaging, AI is widely seen as the next frontier in hospitality innovation. But how far have we really come, and where is the line between aspiration and implementation? To answer that, we surveyed over 1,000 hotels across Europe. What we found was a mixed picture, one that reveals both strong belief in AI's potential and the practical barriers still holding many hotels back.

If you talk to any hotel executive today, the topic of artificial intelligence (AI) is almost guaranteed to come up. From predictive analytics to personalised guest messaging, AI is widely regarded as the next frontier in hospitality innovation. But how far along are we really? And what is the difference between aspiration and implementation?

To find out, we recently surveyed over 1,000 hotels in Austria, France, Germany, Italy and Switzerland. Results were insightful, not only because of the ways in which AI is already being used in hotels, but also because of the areas in which it is struggling to take root.

STRONG INTENTIONS, UNEVEN REALITY

The majority of hotel managers recognise the value of AI. When asked in which areas AI will be most useful for hotels in the future, respondents cited reservations as the top area, followed closely by marketing, customer relationship management and data analysis/reporting. The industry clearly sees AI as a driver of performance and personalisation.

However, belief does not always translate into action. When we asked hotels which AI-based technologies they use, a much more cautious picture emerged. Only two solutions are widely implemented today: AI-generated content (e.g. ChatGPT or Gemini) for guest communication and online review analysis. Beyond that, adoption drops off quickly. Real-time revenue management, personalised emails or app recommendations, and predictive occupancy analytics are gaining traction, but more advanced applications such as chatbots, automated customer replies and virtual assistants remain on the fringes.

The contrast is even more striking when it comes to operational use cases. Fewer than 10% of hotels currently use AI for tasks such as guest check-in via facial recognition, robotic room automation or waste analysis. These figures suggest that the hospitality industry is still experimenting with basic use cases and is holding back from deeper operational transformation.

THE PERCEIVED BARRIERS ARE REAL

So what's holding hotels back? Our respondents were clear: it's not a lack of interest, but a lack of clarity and capability.

The biggest barrier cited was 'poor knowledge of the available AI solutions on the market'. This was followed closely by integration challenges, a lack of technical skills and high setup costs. In short, AI is seen as both confusing and expensive, particularly by small to mid-sized operators who often lack dedicated tech teams.

Concerns about guest data privacy and staff acceptance were also widely reported. While these challenges are not new, they take on fresh urgency in the context of AI, where personalisation and automation require a degree of trust from both guests and employees that many hoteliers are still working to establish. While AI offers the promise of efficiency and optimisation, many respondents were simply not convinced that it would deliver a solid return on investment.

THE NEED FOR OPERATIONAL ANCHORING

To us, the message is clear: we have moved beyond the 'curiosity phase' of AI, but have not yet reached the 'confidence phase'. For AI to be adopted more widely in the hospitality industry, it needs to be firmly rooted in operational processes. This requires vendors to move away from generic sales pitches and help hoteliers develop AI roadmaps based on real workflows, staff capabilities and measurable performance goals. AI must help hoteliers solve their most urgent challenges, such as improving guest satisfaction, optimising rates in volatile markets and reducing staff workload, not just because it's novel, but because it's necessary.

The fact that 81% of respondents already use AI for content generation demonstrates how swiftly new tools can disseminate when the barriers are low and the value is evident. The challenge now is to apply that same clarity and usability to more complex areas, such as dynamic staffing and personalisation at scale.

A SHIFT IN MINDSET

The final piece is cultural. As one respondent told us: "*AI is not the problem – change is.*" This sentiment reflects the fact that integrating AI is not just about choosing the right tool, but about preparing teams, rethinking processes, and fostering a learning mindset. That requires training – not only on how to use AI tools, but on how to lead AI projects, measure outcomes, and manage ethical questions.

WHERE DO WE GO FROM HERE?

If we had to summarize the state of AI in European hospitality today, We'd call it "*promising, but not yet aligned.*" Hoteliers want AI that fits their needs, respects their limits, and empowers their people. They're not looking for robots – they're looking for relief, relevance, and results.



HYB



Outlet or Boutique? The Strategic Power of Dual Revenue Management

Revenue Growth

Piergiorgio Schirru
Executive Vice President & Board Member at Blastness

For years, hotel revenue strategy has defaulted to a one size fits all model: optimize for RevPAR, chase occupancy, and call it success. But the landscape has shifted. Guests are savvier, channels more fragmented, and margin tighter than ever. In this complexity, a new clarity is emerging. Some hotels don't want to be everything to everyone. They want to be something distinct to someone. That is where Dual Revenue Management steps in, not as a tweak to existing models, but as a rethinking of how value and volume can coexist. This is not about choosing sides. It is about choosing structure. A smarter, more nuanced framework where distribution is no longer a battlefield but a strategy board, and every move has a purpose.

The hotel industry has spoken a single dialect for decades: RevPAR, occupancy rates, and linear demand optimization. Like a retail outlet, where everything must go, but often at the cost of value and brand erosion. Yet, not every hotel aspires (nor should they) to be a high-volume operation. Some prefer to operate like a boutique in a creative district: carefully curated, margin-focused, and strategically selective. Here lies the tension between quantity and quality.

And it's precisely in this tension that the concept I call **Dual Revenue Management** finds its purpose. DRM doesn't ask hotels to choose between volume and value; it creates a dual-track system where both coexist, each governed by its logic, metrics, and priorities. And, in an industry polarized by digital ecosystems and fragmented distribution, this is not just a tactic; it's a structural rethinking.

DEFINING THE CORE CONCEPT

Dual Revenue Management (DRM) is a strategic framework that separates and optimizes two distinct revenue streams within a single hotel operation: intermediated distribution (such as OTAs, wholesalers, bedbanks, and tour operators) and direct distribution (brand.com, CRM-driven bookings, assisted reservations, walk-ins, chatbots, etc.). Each of these ecosystems operates under a unique constellation of economic incentives, user behaviors, and technological constraints. Managing both streams under a single pricing strategy is like applying the same retail model to a shopping mall and a by-appointment-only Patek Philippe showroom. It flattens complexity, erases nuance, and ultimately leaves value on the table.

DRM breaks this model. It proposes differentiated KPIs, distinct pricing architectures, and (crucially) divergent objectives: *maximize volume where scale wins, and maximize margin where control prevails*. But DRM is not just a strategic framework; it's an operational system. Born from over a decade of specialization in direct bookings, DRM translates high-level strategy into daily execution through a dedicated algorithmic layer and distribution-specific KPIs.

Unlike traditional revenue management strategies, which generalize across all channels based on occupancy trends or competitive sets, DRM isolates the direct ecosystem to calculate the most profitable rate for that channel alone. It leverages metrics such as Web Share, Direct Conversion Rate, and Web Demand to generate dynamic pricing suggestions designed to boost margin and accelerate direct acquisition.

Crucially, this is achieved without compromising the integrity of the global rate architecture. The hotel gains the flexibility to tactically oscillate between direct and indirect logics while preserving strategic coherence.

SUPPORTING DATA & EVIDENCE

The promise of Dual Revenue Management is not theoretical; it's empirical. And the numbers speak clearly. Let's start with a paradox: despite the industry's best efforts to enhance the digital experience, direct websites still convert at only 1.5% to 3%. OTAs, by contrast, routinely achieve 10%+ conversion rates. The gap is real and persistent. So why invest in the smaller pond? Because margin matters more than volume. The acquisition cost of a direct booking is typically 50% lower than that of an intermediated one.

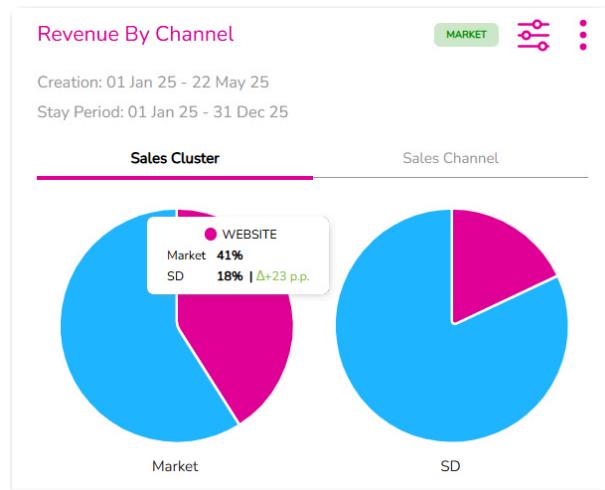
More importantly, studies consistently show that direct customers tend to exhibit a lifetime value up to 3x higher than those acquired via OTAs. That's where DRM enters the picture: in properties adopting a dual revenue approach, we've observed a consistent pattern: net profitability improves, even when occupancy remains flat. The secret lies in margin optimization and a reduced dependence on discount-driven intermediaries. One KPI that has proven especially insightful in operationalizing this shift is Web Share: the percentage of total bookings that originate from the hotel's brand.com. It captures the strategic health of the direct channel in a single, trackable metric.

A standout example comes from our pilot property: a 4-star leisure hotel in a major Italian city, and the first to fully implement Dual Revenue Management, both strategically and algorithmically. Web Share increased by 12 percentage points year-over-year, despite no growth in traffic volume or promotional activity. The gain was driven purely by a pricing model tailored to the direct channel, powered by our algorithms. The implication is clear: when pricing logic reflects the unique dynamics of the direct ecosystem, performance improves, organically and sustainably.



This is not an isolated case. Since the start of 2025, we've expanded DRM, complete with its algorithmic engine, to a wider and more diverse group of hotels. These include both urban and leisure properties, ranging from 4 to 5 star, across multiple destinations. In this extended sample, the trend holds: comparing YTD data for stays in 2025 against the same booking window in the previous year, direct revenue share grew from 18% to 41%, without cannibalizing other distribution channels.

These are not just success stories; they are signals. They suggest that in a hospitality landscape increasingly fragmented by intermediaries and squeezed by rising acquisition costs, mastering duality may be the only path to clarity.



STRATEGIC APPLICATION: FROM THEORY TO PLAYBOOK

Implementing *Dual Revenue Management* requires more than just tweaking a pricing algorithm; it demands a shift in organizational mindset and a recalibration of how success is measured across channels. Over my career, I came up with a 4-step approach:

1. CHANNEL-SPECIFIC PRICING MODELS:

Intermediated channels operate in a hypercompetitive environment. Here, price elasticity and market visibility dominate. Dynamic pricing engines can optimize occupancy and compression windows, but should also factor in distribution costs and commission thresholds. Direct channels, by contrast, offer control. They allow curated offers, closed-user group promotions, loyalty incentives, and upselling opportunities. Pricing here should reflect yield, narrative coherence, and the ability to communicate value and build trust.

2. DIFFERENTIATED KPI TRACKING:

Rather than evaluating performance through a single lens (e.g., overall ADR or RevPAR), hotels should adopt dual dashboards: one tracking volume-driven metrics (occupancy, channel mix, cost per booking) and another focused on margin-driven KPIs (NetREVPar, CLV, conversion rate, direct-to-non-direct booking ratio).

3. TECH STACK AND DATA ALIGNMENT:

A Dual Revenue approach thrives when CRM, booking engine, RMS, and digital marketing tools are fully integrated. Data silos kill many things, and margin is one of them. Real-time insights into guest behavior, source attribution, and booking friction points are essential for optimizing the direct path.

4. ORGANIZATIONAL REALIGNMENT:

Implementing *Dual Revenue Management* is not just about tactical precision; it demands a structural realignment across departments. The old silos between revenue, marketing, and digital are not just outdated. They're liabilities. Revenue managers can no longer be spreadsheet clerks forecasting demand in isolation. They must evolve into *channel strategists*: operators fluent in yield logic and narrative construction, capable of navigating an increasingly fragmented and algorithmic ecosystem. This isn't a theoretical shift; it's historical. As far back as the 2009 *HSMIA Revenue Management & Internet Marketing Strategy Conference*, voices like Eric Pearson and Bill Carroll were already declaring the end of classical revenue management as we knew it, forecasting its convergence with marketing. They were right. The traditional role is dead. What's emerged is a hybrid professional: part data scientist, part digital diplomat. Someone who doesn't just optimize for RevPAR but designs revenue architectures where each distribution channel becomes an intentional move, not a reactive default. Conversely, marketing can no longer rely on passive brand storytelling. In the *DRM* paradigm, it must become a performance engine that treats direct acquisition as both measurable and meaningful. Engagement must convert, not just resonate. The shared objective? A unified model where every direct booking isn't just a short-term win but the beginning of a long-tail relationship, a data point that feeds the next decision, and a signal of trust that can be monetized well beyond the initial transaction. This is more than realignment. It's a redefinition of roles built for a post-parity, post-silo (both tech and human) world.

CONCLUSION: A GRAMMAR FOR THE POST-PARITY ERA

The age of price parity is fading. Algorithms are increasingly more innovative than agreements, and consumers are more sophisticated than ever. In this new era, hotels need more than reactive tactics; they need a grammar that allows them to write different stories on different pages of the same book. Dual Revenue Management is that grammar. It doesn't oppose OTA being directed, but it orchestrates them. It recognizes that hotels must sometimes operate like outlets, sometimes like boutiques, but always with clarity on who they serve, how, and at what cost. So, the question is no longer whether to disintermediate but how to do it intelligently, profitably, and sustainably. This may be the next chapter: How can predictive data power a new kind of personalization that turns direct booking into direct connection? Because DRM is not about replacing volume with value. It's about *harmonizing* both. In doing so, I am writing a new chapter where direct isn't just cheaper. It's deeper.

¹ *Revenue Management and Internet Marketing Disciplines Converge at HSMIA Conference, Hospitality Net, <https://www.hospitalitynet.org/news/4041094.html> (last consulted on 22 May 2025).*

HN



Agentic AI – The Single Biggest Impact Of AI On Hospitality

AI & Robotics

Max Starkov

Hospitality & travel technologist and digital strategist



Hospitality is on the edge of its next great transformation, and this time it is not mobile driving the change. It is AI. Just look at the numbers. In April 2025, ChatGPT recorded over five billion visits, while traffic to Google declined. This shift marks more than a trend. It signals a complete rethinking of how travel is researched, planned, and booked. And at the center of it all is Agentic AI, the technology that may soon redefine the entire guest journey, from inspiration to reservation.

Transitioning hospitality from Mobile-first to AI-first will be the greatest transformation of our industry since the advent of the Internet. For all the doubters, look at the data: in April of 2025, ChatGPT reached 5.14 billion visits, up 182% from a year ago, while visits to Google declined by 3.2% (Similarweb).

Within this AI transformation, I believe Agentic AI will have the single biggest impact on our industry.

Agentic AI in travel and hospitality is a type of AI that makes autonomous travel decisions and takes actions to achieve specific tasks and goals, from travel planning, research of locations, amenities and rates, to booking hotels, flights and all of the necessary travel auxiliaries to make their master's trip a success. This isn't about your "old fashioned" AI assistant – it's about fully autonomous AI agents that perform complex tasks in real time, interface with other AI Agents, while taking into consideration their "master's" personal preferences, likes and dislikes, travel history and past experiences, etc.

We have already witnessed the emergence of the Personal AI Agents. ChatGPT Operator, Google Gemini AI Agent, Microsoft Copilot AI Agent, Claude AI Agent, etc. are already a fact and their travel research, planning and booking capabilities are growing by the minute.

The booking path via the Personal AI Agent will be very simple: the traveler tasks via voice or typed prompts their AI Agent to find a hotel within certain parameters (location, dates, price range) and, based on all of their "master's" preferences, the AI Agent finds and books the hotel and all necessary auxiliary services.

In the near future, Personal AI Agents will have the option to research, plan and book travel by making a "handshake" with the hotel and other travel suppliers' own AI Agents, or with the OTA's own AI Agents. **The question is, with which one?**

1. HOTEL AI AGENTS

Since Personal AI agents can research, plan and book travelers' trips and vacations autonomously, some experts predict that AI agents will dramatically change the current travel distribution status quo and even make the OTAs obsolete thus establishing the golden age of direct consumer-supplier relationships.

The question is, will hoteliers invest adequately in AI technology and talent to prepare for the rise of Personal AI Agents and become the ultimate beneficiaries of this exciting AI era?

In hospitality, the future Hotel AI Agent is expected to know everything about the property's product, services and amenities, about the destination, local area attractions and activities, festivals, performances and sports events.

It must also know everything that is to know about the property's past guests and be able to provide personalized one-to-one recommendations, pricing and services to "known guests," and close the deal with "new unknown guests."

Naturally, the Hotel AI Agent will be fully interfaced with a) Agentic AI platforms like ChatGPT Operator as well as b) the property's cloud PMS or CRS and CRM.

How are travelers going to use their Personal AI Agents?

A road warrior business traveler may ask his personal AI Agent: "Book a flight to New York, June 20-23rd, Uber, the Hilton Midtown plus dinner at 6pm for four on June 21st at the Gallaghers Steakhouse." Over time, the prompt will become as simple as "Book New York – the usual – here are the dates."

A leisure traveler may instruct their AI Agent: "Find me a hotel in Manhattan June 20-25th, max \$300 per night, close to Central Park for my morning run plus book Buena Vista Social Club on Broadway."

Naturally, the AI Agent will keep the traveler informed of important travel-related alerts and developments, such adverse weather, traffic, road construction, airport and flight delays, etc.

Where will the future Agentic AI platforms get information about the hotels, locations, amenities, ARI (Availability, Rates and Inventory)?

Generative AI platforms like ChatGPT are scraping content like crazy. They are like huge vacuum machines inhaling content from proprietary databases and the Internet.

As we know, hotel ARI is a dynamic content that you cannot just scrape from the Internet, content that requires a) real-time API to a cloud PMS, CRS or Channel Manager or b) handshake with the Hotel AI Agent, which already is API-ed with the above.

How dynamic is hotel ARI? A full-service hotel has to make, on average, over 5 million pricing decisions and rate changes a year (per IDeaS).

In my view, in the long run, **Agentic AI and AI Agent platforms will make hotel websites and mobile apps obsolete.** As mentioned above, to access hotel ARI, AI Agent platforms will need only a) APIs with the hotel cloud PMS, CRS or channel manager, or a handshake with the hotel's own AI Agent, or b) APIs with the OTAs or handshake with their AI Agents.

All of the generic hotel descriptions AI Agent platforms can easily scrape from publicly available information about the hotel on the Internet or from proprietary databases.

2. OTA AI AGENTS

The OTAs will have their own OTA AI Agents that will do their best to outshine and outwit Travel Suppliers' AI Agents in their quest to dominate this new Agentic AI world. As past and current experiences show, the OTAs are much more willing to invest in new technologies and, once again, are much faster than travel suppliers, including hotels, in the adoption of Agentic AI.

Why do some industry experts think that Agentic AI platforms will prefer partnering with the OTAs?

With one API, AI Agent platforms can get access to real-time availability, pricing and booking capabilities with 750,000 hotels, 5 million STRs, 500 airlines and 200 car rental companies. In other words, with one API they can achieve what it took the OTAs 30 years and many billions of dollars to build.

In addition, the AI Agent platforms will get affiliate commissions from every booking they refer to the OTAs, enabling them to monetize their traffic. Let's not forget that generative AI comes at a very steep price: **an AI search query is 10 times more expensive than a regular Google search query.**

Ex. Expedia has been actively using ChatGPT in their customer-facing app and their customer service operations for several years now. ChatGPT Operator pulls real-time travel inventory availability and pricing from and refers bookings to... Expedia. In return, it gets affiliate commissions from Expedia.

WHAT SHOULD HOTELIERS DO TO TAKE FULL ADVANTAGE OF THIS NEW AGENTIC AI ERA?

I hope smart hoteliers will see the potential of Agentic AI and invest in this new technology. I have no doubt, global hotel chains and avant-garde hotel brands are already investing in Agentic AI and AIO (Artificial Intelligence Optimization).

What about the independents? I am skeptical about the ability and willingness of independent hotels to invest in Agentic AI.

A good place for any independent to start is your AIO, the AI version of SEO. The era of stuffing your website content with SEO keyword terms is gone. General descriptions of your hotel product like "*We offer world-class spa treatments*" are meaningless for AIO. Instead use product-oriented content like "*We offer professional facial massage from \$150.*"

Invest in content marketing with the goal to be cited everywhere. SEO company VertoDigital's audits show that **only 25% of AI answers are pulled from website content**, in this case hotel website content. **The rest comes from citations about the hotel in social media, YouTube, travel-related sites and blogs, customer reviews, etc.**

Independents should be working with their cloud PMS, CRS or Channel Manager tech vendors to make sure they are plugged into the AI Agent platforms, similar to how the OTA CRSs have been API-ed with these same platforms. Also, I believe in the emergence of new AI Agent enablement tech vendors, specializing in hospitality, similar to today's vendors that enable independent hotels for metasearch, B2B distribution, etc.



HYB



Do's & Don'ts for Turning Guest Data Into Direct Bookings

Digital Strategy

Karen Stephens
Chief Marketing Officer, Revinate



You have probably heard it before: your guest data is one of your hotel's most valuable assets. But here's the uncomfortable truth. Most of it is just sitting there, untouched. Unused. Unloved. And that's a problem. Because data doesn't drive value unless it's activated. When you connect the dots between systems, teams, and guest touchpoints, magic happens. Suddenly, you are not just sending emails, you are sending the right message to the right guest at the right time. You are not just answering phone calls, you are anticipating needs. And you are not just looking at dashboards, you are making decisions that move the needle on loyalty, bookings, and revenue. Ready to turn that data dust into gold? Let's get into it.

I bet you have a great view, sitting atop mountains of guest data. But is a good view all you really have?

Most hotels really are sitting on mountains of guest data, but only a handful are using what they have to drive meaningful results. I have spoken with too many hoteliers who say the same thing: "We have the data, but we don't really do anything with it."

That needs to change, and here's why: [Activating guest data](#) across channels – email, voice, and even the on-property experience – unlocks better personalization. That personalization isn't the end goal, but instead the fuel you need to boost direct bookings and reduce your reliance on OTAs.

In this article, I'll walk you through the key do's and don'ts for turning that untapped guest data into a powerful, scalable, and repeatable process that fosters the guest loyalty and direct revenue you have been dreaming of.

DO'S

1 DO CENTRALIZE YOUR GUEST DATA INTO A UNIFIED PLATFORM

If I were starting fresh at a hotel tomorrow, this is where I would begin. Without a unified view of your guest data, you are flying blind. A connected system (like a proper CDP) lets your marketing, reservations, and front desk teams all work from the same playbook – and that's when the real magic happens.

2 DO USE SEGMENTATION TO PERSONALIZE YOUR OFFERS

Want to stand out in a guest's inbox? Then don't blast, but instead segment. Review that guest's booking behavior, frequency, spend, and even preferences to make every message feel handpicked. That's how you start turning emails into direct bookings, not just opens.

3 DO ENRICH YOUR VOICE RESERVATIONS WITH PRE-CALL GUEST INSIGHTS

If your hotel voice channel isn't data-powered, you are leaving money on the table. Equip your reservation agents with insights before they even pick up the phone by providing them with details like a guest's last stay, preferences, loyalty status, and more. The conversation becomes less of a transaction and more about the personalization you can infuse into the upcoming stay. And that's where conversion happens.

4 DO AUTOMATE YOUR EMAIL MARKETING BASED ON GUEST LIFECYCLE

I have seen too many hotels send emails just because "it's time." That's backwards. Instead, build campaigns around the guest's journey: pre-arrival nudges, post-stay re-engagement, and seasonal offers based on past behaviors. Let your [hotel email marketing](#) meet guests where they are, not where your calendar says they should be.

5 DO PROACTIVELY TARGET PAST GUESTS WITH HIGH INTENT

Every hotel has "*hidden gold*" – past guests who are primed to rebook. Maybe they clicked a recent campaign. Maybe they stayed the same time last year. If I were building a direct booking strategy, this segment would be one of my first targets. The intent is already there; you just need to close the loop.

6 DO USE YOUR CALL DATA TO INFORM FUTURE CAMPAIGNS

Your voice channel isn't just a conversion machine – it's also a valuable listening tool and the ultimate data collector. No piece of data is wasted. Booking objections, frequently asked questions, and upsell interest can all feed into future email campaigns. So, the next time guests get an email after hanging up, they'll feel like you are reading their minds. But, in reality, you are just listening better.

7 DO PRIORITIZE HIGH-VALUE GUESTS AND LOYALTY SEGMENTS

It may sound harsh, but some guests are just worth more – in revenue, in frequency, and in influence. If I were you, I would identify them early and make sure every touchpoint is dialed up for better offers, smoother booking, and recognition at check-in. Your guest data can tell you who those high-value guests are, and then it's on you to treat them like it.

8 DO UNIFY YOUR DATA ACROSS CHANNELS (EMAIL, VOICE, SURVEY)

Here's a big one I see hotels miss: cross-channel consistency. Imagine there is an invisible thread that connects pieces of information you have gathered from email, the voice channel, post-stay surveys, and even on-site service notes. All of it's connected, and that connection is how you build a living, breathing hotel guest profile. When all your channels talk to each other, the experience just *feels* better for the guest.

9 DO ALIGN YOUR MARKETING AND RESERVATION SALES TEAMS

If your data is siloed, that's no good. The same idea goes for your teams. If your marketing department is completely cut off from your reservation sales team, then that creates inefficiency. Because you can bet they aren't sharing guest data to use for guest communication. When both teams have shared access to guest data, they can collaborate on campaigns that convert. Alignment isn't optional anymore – it's essential.

10 DO CONTINUOUSLY TEST AND REFINE YOUR CAMPAIGNS BASED ON PERFORMANCE

Testing and refining never stop. Constantly test subject lines, send times, offer types, and even call scripts. The more you experiment, the more your guest data sharpens into strategy. Direct bookings don't improve by accident – they improve through iteration. And your guest's preferences and reason to book are always changing, so your campaigns should change with them.

DON'TS

1 DON'T LET YOUR DATA SIT SILOED IN DIFFERENT SYSTEMS OR SPREADSHEETS

If your guest data is locked away in disconnected systems, you won't be able to use it when it matters. I have seen hotels waste hours trying to track down a guest's last stay. That's not scalable. Centralize it, or you are stuck reacting instead of leading. More importantly, if you want to get any benefit out of anything 'new' in the burgeoning world of AI, your data has to be in one place. AI doesn't work with siloed data.

2 DON'T IGNORE YOUR VOICE CHANNEL'S CONVERSION POTENTIAL

The hotel voice channel still outperforms most digital channels when used well, and we have the data to prove it. If you are ignoring it, you are missing out on high-intent, high-converting moments. Equip your team with the right training to maximize the value of every call and treat it like the revenue and data generator it is.

3 DON'T SEND GENERIC EMAILS WITHOUT SEGMENTATION

Stop treating every guest like they are the same, because they are not. I can almost guarantee your direct bookings will lift when you start sending segmented, relevant campaigns that feel crafted, not canned. Guests want to believe and feel like you know them, so the more accurate you can be in sending the right email to the right guest, the better your results will be.

4 DON'T LET YOUR RESERVATION TEAM OPERATE WITHOUT ACCESS TO GUEST HISTORY

If I were a reservation agent, I would want access to a guest's history before every call. Without it, they are simply left guessing. Give your team the data, and you'll see stronger conversations and stronger conversions. How else are you going to identify your most loyal guests, enrich their profiles, and tap into the reasons why they choose your hotel over another?

5 DON'T NEGLECT POST-STAY SURVEY INSIGHTS

Guests are already giving you feedback. Are you listening? If you are not using post-stay survey insights to adjust your outreach or improve your service, you are missing one of your richest guest data sources. Send these surveys soon after the stay ends, so that guests can provide fresh feedback. Waiting too long can lead to stale feedback that you really can't accurately use to improve the guest experience.

6 DON'T TREAT OTA GUESTS THE SAME AS YOUR LOYAL GUESTS

This one's simple: Not all guests are equal. Direct bookers are more likely to stay loyal to your hotel and provide you with rich guest data. So reward your loyal book-direct customers, and create frictionless paths to convert OTA guests into future direct ones. Ever heard of OTA winback campaigns? They are a great way to flip OTA bookers and turn them into direct bookers with the assurance that you can give guests what OTA's can't – a personalized experience.

7 DON'T OVERLOOK DROP-OFF POINTS IN THE BOOKING JOURNEY

Have you mapped your booking journey lately? If not, you might be missing clear drop-off points – where your guests are leaving the booking engine without booking (also known as the dreaded abandoned guests). I would be looking at form friction, pricing confusion, or gaps in the booking experience. The quicker you can identify these drop-off points, the sooner you can get back to collecting guest data. When a guest abandons the booking journey, their data does too.

8 DON'T SKIP PERFORMANCE TRACKING

No data, no progress. I would never run a campaign or call script without tracking its performance. Whether it's email metrics or call conversion rates, you need data to optimize. Find out what's working and what's not so that you can make data collection and activation as seamless as possible.

9 DON'T IGNORE THE VALUE OF HUMAN TOUCH

Automation is great – until it's not. Guests still want to feel known, so use automation to enable better personalization, not eliminate it. For example, automating email sends frees up your staff by reducing manual work and adding more time to spend with guests. Real change happens when technology enhances hospitality and the human connection instead of replacing it.

10 DON'T IGNORE DATA PRIVACY AND CONSENT REQUIREMENTS

We all want to use data better, but we can't cut corners. Make sure every data point is collected ethically, transparently, and in line with privacy laws. Trust is the new currency, and your guests won't give you a second chance. The best setup is to adopt and operate with technology that puts privacy standards first and reduces the chances that your guests' information could fall into the wrong hands.

DIRECT BOOKINGS ARE A DATA POINT AWAY

As you move forward in 2025, remember that the hotels that are winning right now aren't just collecting data, they are activating it – thoughtfully, strategically, and across every channel. If I were running a hotel in 2025, I would think less about "how much" data I have and more about the smarter use of what I already have. Your guest data is already in your systems. The question is: Are you using it to create value for your guests to book direct and add to your bottom line?

So I'll leave you with this: How is your hotel using guest data today – and how could you use it better tomorrow?

HVB



Emerging Dynamics in Hospitality in 2025: A Future Around Digital Identity

Digital Strategy

Pedro Torres
CEO and Co-Founder, Youverse



Hospitality has never just been about rooms, rates, or reservations. It's about recognition: the ability to know your guest, remember their preferences, and deliver a stay that feels like it was designed just for them. In today's world, that recognition is going digital. From biometric check-ins to identity-linked loyalty rewards, a quiet revolution is unfolding, one guest profile at a time. But this is not simply about using technology for the sake of it. It is about creating seamless, secure, and personalized journeys that begin well before arrival and continue long after departure.

Hospitality has always been about creating unforgettable experiences, where every detail matters – from the warmth of a welcome to the comfort of a room. Today, those details increasingly include digital touchpoints that connect guests seamlessly to the services and spaces they enjoy.

The industry is undergoing a profound digital transformation, with digital identity solutions at its core. These innovations are not only redefining how guest data is managed but are also unlocking new possibilities in personalization and enhancing the overall guest journey.

In this article, I'll explore the key trends driving change across three critical areas: managing guest identities, personalizing experiences, and transforming interactions. Let's dive in.

MANAGING GUEST IDENTITIES

1. UNLOCK EFFORTLESS CHECK-IN WITH BIOMETRICS

Waiting at the front desk is a hassle no guest wants to endure. Manual check-in is time-consuming and frustrating for both guests and staff. A seamless check-in process, ideally completed on guests' terms via their phones, is now expected. The challenge is to simplify this process while ensuring robust security.

Actionable tip: Invest in systems compliant with GDPR and ISO/IEC 27001 standards for secure biometric data processing.

2. GIVE GUESTS CONTROL OVER THEIR DATA

Guests are increasingly conscious about their personal data and prefer privacy-first solutions. Traditional methods of data management are being replaced by decentralized systems, ensuring better security and minimizing risks of breaches.

Actionable tip: Implement decentralized identity solutions to align with privacy-conscious travelers.

3. IMPROVE COMPLIANCE AND FRAUD DETECTION PROCESSES

Many hotels rely on outdated methods for verifying guest identities and maintaining records, which are often error-prone and time-consuming. AI-powered identity verification can automate compliance tasks while detecting fraud in real time.

Actionable tip: Adopt AI-powered identity verification systems for efficiency and fraud detection.

4. GET READY FOR DIGITAL WALLETS

Digital identity wallets, compliant with eIDAS 2.0 standards, are set to become essential across the EU. These systems enable secure, seamless cross-border identity verification, building trust with international guests.

Actionable tip: Prepare systems for eIDAS 2.0-compliant digital identity wallets to ensure smooth operations across regions.

PERSONALIZING GUEST EXPERIENCES

5. CATER TO GUESTS' UNIQUE PREFERENCES

Digital identity solutions enable hyper-personalized services, such as customized dining options or pre-set room temperatures. These tailored experiences foster loyalty by making each guest feel valued.

Actionable tip: Use AI solutions integrated with your Customer Relationship Management (CRM) or Property Management System (PMS) to anticipate guest preferences.

6. REWARD WITH A PERSONAL TOUCH

Linking loyalty programs to digital identities can make rewards more meaningful and personalized, driving deeper guest engagement and encouraging repeat visits.

Actionable tip: Collaborate with travel ecosystems to offer cross-platform loyalty rewards.

7. ADAPT TO THE DIGITAL NOMAD REVOLUTION

Digital nomads – early adopters of digital identity solutions – demand flexible, portable systems for seamless transitions between locations and services. They represent the future of a connected, borderless world.

Actionable tip: Equip systems to recognize and support digital identities globally, enhancing flexibility for this key demographic.

TRANSFORMING GUEST INTERACTIONS

8. CREATE CONSISTENCY ACROSS TOUCHPOINTS

Inconsistent experiences across apps, kiosks, and websites can be a dealbreaker. Unified identity solutions create a seamless and consistent experience, enhancing personalization and convenience.

Actionable tip: Implement platforms that integrate with existing systems across all channels for a unified guest experience.

9. MEET MODERN GUEST EXPECTATIONS

Contactless systems powered by digital identities are increasingly popular for check-ins, payments, and amenity access. Biometric systems simplify these operations while enhancing hygiene and efficiency.

Actionable tip: Integrate facial authentication systems to streamline processes and improve guest convenience.

10. INTEGRATE WITH TRAVEL ECOSYSTEMS

Digital identity solutions extend beyond individual hotels to the broader travel ecosystem. Linking digital identities with airlines, car rental services, and attractions creates a seamless end-to-end guest journey.

Actionable tip: Partner with travel ecosystem stakeholders to provide unified experiences from booking to departure.

LOOKING AHEAD

The opportunities are immense, but so are the responsibilities. As we harness the power of digital identity, let's ensure that trust, privacy, and personalization remain at the heart of every innovation. After all, hospitality has always been about making people feel valued, and in the digital age, that starts with recognizing who they are.



HVB



The United Nations of Hotel Tech (A Cautionary Tale in Three Acts)

Hotel Technology

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Let's be honest. Hotel tech is a mess. Not a quirky, fix-it-with-duct-tape mess, but a full-on, integration-induced identity crisis. Every time a vendor tries to connect to a PMS, a developer cries. The industry has spent years chasing standards, frameworks, and white papers, only to end up with a Frankenstein stack of systems that barely speak to each other. And for what? So we can proudly say we built a digital house of cards that collapses the moment someone updates an API?

If you've ever tried to build or adopt a piece of hotel tech, you already know what a tangled mess we've gotten ourselves into. The hospitality industry doesn't just have an interoperability issue — it has a full-blown, chronic, and crippling integration dependency disorder. It's the main reason technology adoption remains sluggish, innovation stalls, and brilliant startups quietly die in dark basements of "we couldn't connect to all PMSSs in the world."

But what if the answer isn't more standards... but more intelligence?

Let me tell you a story...

ACT ONE

Imagine this.

It's a tense afternoon at the United Nations summit. Two world leaders sit across from one another: the Russian President on one side, the Chinese President on the other. They're both eager to collaborate on a joint economic initiative — maybe even something revolutionary.

There's just one problem: they don't speak the same language.



An American diplomat strolls over with smug confidence. He pulls up a chair between them and says, "Alright, listen up. If you two want to work together, you're both going to need to learn English." The Russian raises an eyebrow. The Chinese President leans in, unimpressed. "But we have words in Chinese that don't even exist in English," he says. "How am I supposed to communicate something important — like 'guanxi' or 'yuanfen'? These concepts just get lost in translation." The American shrugs. "Tough luck," he says. "That's the only way. Learn the standard or go home."

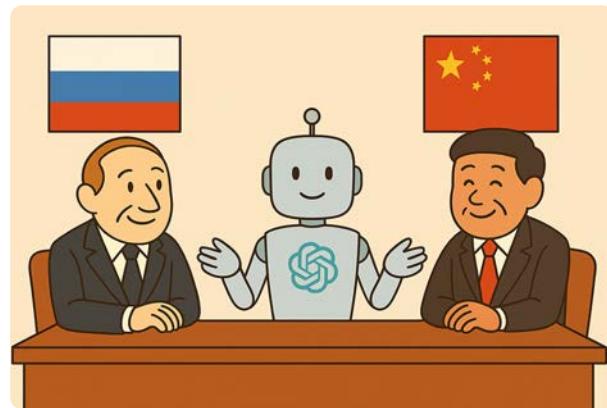
The meeting ends with frustrated murmurs, vague diplomatic statements, and absolutely no progress. No deals, no collaboration, just an expensive waste of air conditioning.

That, dear reader, is how our industry has been treating integrations for the last two decades.

ACT TWO

Same summit, same table, same high stakes. Only this time, instead of the American standard-enforcer wedging himself between world powers, there's something new: an AI-powered interpreter.

This bot doesn't demand compliance. It doesn't expect anyone to change their entire language system. It listens to the Russian President speak Russian. It listens to the Chinese President speak Chinese. And in real time, it interprets not just the words, but the intent, the context, the nuance. It even picks up on sarcasm and cultural idioms.



The presidents laugh. They collaborate. They start drafting plans. Deals get signed. Progress is made.

No one had to rewrite their constitution. No one had to "standardize" their culture. They were understood — as they are.

That's what GenAI can bring to the hospitality industry.

ACT THREE

A follow-up scene where the AI interpreter gets promoted to Secretary General and rewrites the entire UN protocol handbook. And that's basically what we need in our industry.

Standards Are Dead. GenAI Is the Future of Hotel Tech Integration.

Every piece of technology in hospitality — PMS, RMS, POS, CRS, CRM, IoT, you name it — really only does two things: it consumes data and it creates it. So, in a perfect world, they'd all be fluent in each other's languages and trade data like old friends at a reunion.

But reality is more like a United Nations summit without translators. No one speaks the same dialect, half the participants don't share their notes, and everyone's afraid of touching anything new.

This results in fragmented, manual, error-prone workflows that require armies of humans to do what should be instant and automated. It's inefficient, frustrating, and expensive — and it's why many hoteliers just give up and stick to their legacy systems, even if they're about as modern as a flip phone.

WHY STANDARDS FAILED US

You might be thinking, “*Wait, don’t we have standards? What about HTNG?*”

Yes, HTNG gave it a good try. And worked hard on it for 20+ years. But hospitality is a uniquely complex beast. It turns out you can’t fit a million different business models, tech stacks, and regional quirks into a one-size-fits-all white paper. The result? Vendors either ignore the standards, do their own thing, or use models that are about as helpful as a fax machine in 2025.

Trying to force vendors into compliance with rigid standards is like telling hotel guests to complete a tax return before they can unlock their room. Not gonna happen.

We've been living in the first Act of that story for way too long — forcing systems to conform to “standards” that only make sense to the people who wrote them, often disconnected from the messy reality of thousands of tech stacks, data models, and local business rules. **And when those systems push back, we call them “noncompliant,” as if it’s their fault for not fitting into our square little boxes.**

ENTER GENAI: THE INTELLIGENT MIDDLE LAYER

So... what if we stopped trying to **enforce** uniformity — and instead used AI to **translate** chaos into clarity?

Let's talk GenAI. Generative AI isn't just about writing emails or creating creepy deepfakes. It can truly change the game. It's the smart, multilingual, always-aware translator sitting in the middle. It just listens, interprets, adapts — and connects.

Imagine an AI-powered middleware layer that:

- Ingests unstructured, messy, non-standardized data
- Automatically understands each system's “language”
- Translates inputs and outputs between platforms in real-time
- Reshapes data into a structured, usable format without manual mapping

Boom. No more one-off custom integrations. No more brittle APIs that break every time someone sneezes on the code. No more waiting six months for an interface that sort of works... if the moon is in Scorpio.

Think of it like Google Translate — but for software protocols. And smarter.

If hospitality tech has any hope of functioning like a true ecosystem rather than a siloed mess of incompatible languages and stubborn legacy protocols, we need to stop playing the role of the American diplomat.

Instead, we need to build — and trust — the intelligent interpreter.

THE TECHNOLOGY ALREADY EXISTS. SO WHY AREN’T WE USING IT?

Let's be clear: this isn't sci-fi. The foundational tech is already here. Large Language Models (LLMs) can now understand and manipulate complex code structures, and tools like vector databases and real-time inference engines can process dynamic, changing data on the fly.

So what's stopping us?

Fear. Legacy inertia. Political turf wars. You name it.

In other words: it's not the lack of tech that's holding us back — it's the lack of balls.

THE MIDDLEWARE OF THE FUTURE: NOT JUST PIPES, BUT BRAINS

Here's a bold idea: HTNG as an organization that has worked so hard on establishing standards for our industry doesn't need to die — but it does need to evolve.

HTNG 2.0 shouldn't be about setting more rigid rules. It should be the facilitator of an intelligent, GenAI-driven integration layer. Rather than publishing more “standards,” HTNG could champion a universal AI-based translation engine that understands legacy APIs, modern APIs, SOAP, REST, GraphQL, YAML, or some poor developer's drunken attempt at JSON.

Imagine open-source GenAI models trained specifically on hospitality protocols. Imagine standard *outcomes*, not formats. That's a future everyone could rally around.

Today's middleware acts like plumbing. Tomorrow's middleware needs to *think*.

With GenAI, middleware can become an intelligent router — figuring out, on the fly, how to get the right data from the RMS to the PMS, or from the CRM to the mobile check-in app.

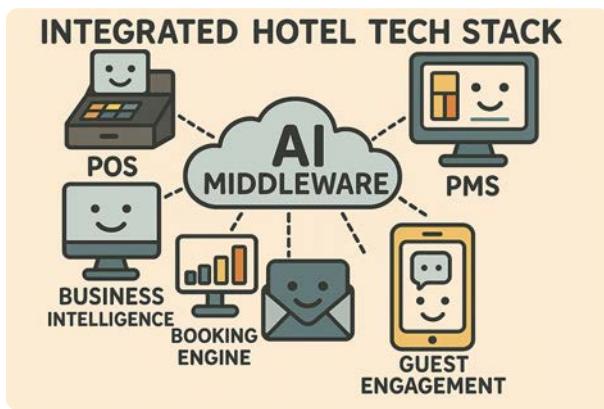
Instead of building 1,000 custom PMS integrations, a vendor could build *one* connection to the AI middleware, which then handles the rest.

This is the future. And it's already being prototyped in other industries.

A CALL TO ACTION: LET'S MAKE THIS HAPPEN

The industry doesn't need another white paper. It needs bold experimentation. Here's what we need:

1. **Pilot Programs** – Let's get HFTP, AHLA/HTNG or another large organization to fund a GenAI middleware MVP. Show the world it works.
2. **Open-Source Collaboration** – Pool training data, build shared models, and make the middleware smart enough to handle any vendor's quirks.
3. **Focus on Results, Not Rules** – Measure integration success not by compliance with old standards, but by speed, stability, and interoperability.
4. **Kill the Gatekeepers** – Stop charging developers for API access or making them jump through arbitrary hoops. If you want innovation, open the gates.



CONCLUSION: WE'RE CLOSER THAN YOU THINK

Hospitality tech has long suffered under the weight of its own complexity. But with GenAI, we finally have the tool to end the nightmare. We can stop trying to make everyone conform to rigid standards and instead build a system that adapts intelligently to whatever it touches.

HTNG 2.0 could lead this revolution — if it has the courage to embrace intelligence over enforcement. And vendors, operators, and innovators alike could benefit from a world where technology just *works* together.

It's not magic. It's machine learning.

And it's time we used it.



HYB



Why We Still Can't Get Sh*t Done: Breaking the Traps That Hold Us Back

Leadership

Dan Wacksman
Principal, SASSATO LLC



If you've worked in hospitality long enough, you know this dance. The strategy decks pile up. The ideas are solid. The problems are clear. And yet somehow we're still stuck. Not because we're clueless. Not because we're lazy. But because something always gets in the way of execution. The day gets busy. The budget gets tight. The email gets buried. And before you know it, the thing you meant to tackle is still sitting on your to-do list, three quarters later.

Sound familiar? You're not alone. Let's talk about why it happens and more importantly how to start making real progress again. For anyone who's spent time working in hospitality, on-property or in corporate, you've probably had the same experience: we know what needs to be done, but we just... don't do it. Or we start, then stall. Or we decide, then re-decide. Again and again. It's not that we lack knowledge or ideas. Often, we know the problems and we even know the solutions. What we lack is momentum. Execution. Follow-through.

After years as both a corporate leader and now a consultant, I see the same five traps showing up over and over again. They keep teams spinning, projects stalling, and progress perpetually pending. Let's talk about them, and more importantly, how we might finally break free.

THE "TOO BUSY" TRAP

This is hands down the most common trap. Everyone's overloaded, especially your top performers. The problem isn't awareness or effort, it's prioritization. This trap always brings me back to Stephen Covey's *"7 Habits of Highly Effective People,"* and specifically Habit 3: Put First Things First. Covey borrowed from Eisenhower's urgent vs. important matrix. The gist: urgent tasks scream the loudest, but important and not urgent ones move the needle. Covey emphasized the magic of Quadrant 2: things that are important but not urgent – strategy, planning, innovation. These are the game-changers, but they often get ignored because they don't have a flashing deadline. We all spend too much time reacting and not enough time building. You don't need to categorize your whole calendar, but just being aware of this framework helps. Make space for the work that matters most – even if no one's yelling for it.

THE "TOO COMPLICATED" TRAP

Some problems feel too big, too messy, too political, or just too damn hard. Think of multi-stakeholder tech projects or entrenched operational processes. We freeze, delay, and then avoid. The trick here? Simplify. Take a page from any solid problem-solving framework: define the problem, gather info, brainstorm solutions, pick the best path, and map out your plan. Sounds basic, right? But so often we skip steps, or never even start. The key is to eat the elephant one bite at a time. Yes, it's a cliché. Yes, it's still true.

THE "CUTTING THE ROAST AT BOTH ENDS" TRAP

This one comes from a story: A family always cuts both ends off the roast before cooking. When asked why, no one knows. Turns out, Great Grandma had a small pan. But the habit lived on for generations.

Every hotel has its own version of this. Legacy processes and assumptions that nobody questions anymore. Workarounds that got baked into new systems. Decisions made for reasons that no longer exist. Sometimes it just takes fresh eyes. A new hire. A teammate from another department. A consultant (hi). At a previous company, we did *"Fresh Eyes Reviews"* with new team members after 60 days. It was amazing what they could spot. You can also use tools like the Six Thinking Hats to shake up how your team approaches problems. The goal: challenge the default and stop cutting the roast.

THE "TOO POLITICAL" TRAP

Not political as in Washington. Political as in internal turf wars, sacred cows, and departmental friction. Marketing wants to push direct bookings. IT resists the tech. Ops doesn't want to change the flow. Sometimes people cling to old decisions, systems, or vendors because they feel ownership. Or they're afraid to speak up. Or they know it won't go anywhere. This one's hard. It takes leadership. Not just from the top, but across the organization. You need a culture where people can question, challenge, and collaborate without fear. Easier said than done, I know. But essential.

THE "FOFU" TRAP (FEAR OF F**KING UP)

This is the quiet killer of decisions. Teams stall. RFPs drag out. Projects get endlessly reviewed. All because we're terrified of making the wrong call. The reality? There's rarely a perfect answer. Most of the time, you're choosing between a few good-but-imperfect options. Teddy Roosevelt said it best: *"In any moment of decision, the best thing you can do is the right thing, the next best thing is the wrong thing, and the worst thing you can do is nothing."* We over-index on due diligence and forget to act. Tech companies iterate. They test. They launch. They move fast and fix later. We procrastinate, deliberate, and hope someone else makes the call. There's a middle ground between reckless and frozen. Let's find it.

WHAT NOW?

My challenge: pick one or two things you already know need to get done. Not necessarily a big new idea – just something you've been circling for weeks or months (or maybe years!). Maybe it's a system that needs replacing, a process that needs updating, or a conversation that's overdue.

Now ask yourself, are you avoiding it because you're too busy?

- Because it feels too complex?
- Because it's *"just the way we do it?"*
- Because it might step on toes?
- Because you're afraid to make the wrong call?

Whatever the reason, name it. Then move anyway. No roadmap. No task force. Just one clear step forward this week. Momentum beats perfection, and motion is the only way out of these traps.

Break the trap. Get sh*t done.



HYB



Hotel Guest-Facing Automation vs. Traditional Manual Systems: An Evolving Landscape of Service Delivery

AI & Robotics

Carl Winston
Founding Director, Payne School at SDSU

The adoption of automation in hotel guest services has inspired both enthusiasm and hesitation. While the promise of streamlined operations and elevated guest experiences is clear, the reality on the ground is more complex. Automation is not sweeping across the guest journey uniformly; rather, it is advancing in fits and starts, finding strong footholds in some areas while barely disrupting others. This analysis offers a structured, stage by stage examination of where automation is currently outperforming manual systems, where the two coexist in equilibrium, and where the irreplaceable value of human interaction still holds firm. The objective is not to crown a victor in the automation versus manual debate, but to understand how these modes of service interact and where their balance best serves both operational goals and guest expectations.

ABSTRACT

The integration of digital technologies in the lodging sector has generated considerable discourse regarding their transformative potential – particularly in enhancing operational efficiency and guest satisfaction. This essay evaluates the extent to which automation is displacing traditional manual systems in guest-facing hotel services. By examining eight distinct stages of the hotel guest journey, the analysis provides a data-informed perspective on where automation is currently prevailing, where it coexists with manual processes, and where human involvement remains indispensable.

METHODOLOGY

To evaluate the comparative effectiveness of automated versus manual systems, I deconstructed the hotel guest experience into eight sequential stages. Each stage was assessed based on prevalent technologies and traditional practices and categorized according to which approach demonstrated greater efficacy or user preference. The analysis is summarized below:

Stage	Automated Solution	Manual Equivalent	Dominant Approach
Shopping	Web-based advertising, digital storytelling, reviews	Travel agents, personal referrals	Automation
Reservations	Online booking platforms (direct/OTA)	Phone reservations	Automation
Check-in	Online pre-check-in, self-service kiosks	Front desk staff	Tie
Room Access	Mobile key systems, automated key dispensers	Physical keys issued by staff	Tie
In-Stay Services	Hotel apps, QR code menus, digital concierge tools	In-person or phone-based service requests	Tie
Housekeeping Requests	App-based service requests	Door signage, phone calls, direct requests	Manual
Checkout & Billing	Digital checkout, emailed invoices	In-person billing at the front desk	Tie
Post-Stay Feedback	Online review platforms (e.g., TripAdvisor)	Word-of-mouth referrals	Automation

FINDINGS AND DISCUSSION

The results of the analysis suggest that while automation has made substantial inroads into certain phases of the guest journey, particularly those involving pre- and post-stay activities, its dominance is far from comprehensive. Automation clearly outperforms manual systems in three of the eight stages (shopping, reservations, and reviews). Four stages exhibit parity between the two approaches, and one – housekeeping requests – is still more effectively managed through traditional means.

These findings imply a bifurcation in automation's success. Activities that are transactional, time-sensitive, and peripheral to the physical hotel environment (e.g., booking and review management) are more amenable to automation. Conversely, tasks embedded within the on-property experience, where personalization and responsiveness are paramount, show a persistent demand for human engagement.

BARRIERS TO FULL AUTOMATION

Several factors continue to inhibit the complete adoption of guest-facing automation:

- Guest Heterogeneity:** The hospitality sector serves a demographically and culturally diverse clientele. While some guests embrace digital interfaces, others – particularly older or less technologically confident individuals – prefer direct human interaction.
- Contextual Preferences:** Traveler needs vary depending on the nature of the trip. Business travelers often prioritize speed and efficiency, whereas leisure travelers may seek personal engagement and emotional connection. These situational factors affect preferences for automation versus manual service.
- Technological Limitations:** Not all automated tools function reliably. Mobile key systems, for example, frequently encounter technical issues that compromise user trust. Until these technologies achieve higher levels of dependability, adoption will likely remain uneven.
- Organizational Constraints:** Implementing automation entails financial investment, staff training, and cultural change. Smaller or independently operated hotels may lack the resources or strategic motivation to transition from established manual processes.

STRATEGIC IMPLICATIONS

The areas where automation has achieved the greatest traction – shopping, reservations, and reviews – are closely tied to marketing and revenue generation. These domains offer clear return on investment and benefit from relatively mature technologies. For hotel operators, these findings suggest that future automation efforts will likely concentrate on areas with strong financial incentives and high guest receptivity.

Nevertheless, full automation is unlikely to become the universal standard. The essence of hospitality lies in human connection, and the most successful service models may be those that enable guests to choose between high-touch and high-tech options according to their needs.

CONCLUSION

The hospitality industry stands at a pivotal juncture, navigating between the efficiency offered by automation and the enduring value of human service. While automation has made significant gains in certain operational domains, the guest journey continues to be characterized by a hybrid approach. The future of hotel service delivery may depend less on replacing manual systems and more on integrating them with digital solutions in a way that preserves choice, responsiveness, and personalization.

Rather than posing the question as a binary – automation or manual – the more pertinent inquiry may be: *how can hotels empower guests to shape their own service experiences?* The most resilient and guest-centric models will be those that embrace this flexibility.





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Beds, Assets & Balance Sheets: The Hotel Industry's Journey Through Change

Revenue Growth

Mylene Young

Co-Founder and Principal, Son Hospitality Consulting

Alan Dourado

Executive Chairman at Bestmarck Capital Management

After half a century in hospitality, one truth endures: this industry doesn't stand still. It evolves. Slowly at times, all at once at others. What was once a business built on bricks, beds, and brand loyalty is now a high-stakes game of capital flows, margin compression, and digital transformation. The fundamentals remain: service, trust, and consistency. But everything around them is shifting. If the last decade taught us how to survive disruption, the next one will ask us to lead through it. That begins by rethinking what hotels are, who they serve, and how every square foot and every line of code can drive performance.

Sixty years of combined experience in this business teaches one a few things: how to survive, how to adapt, and most importantly, how to lead through change. The hotel business is not just about rooms and revenues; it is about people, performance, and perseverance. We have weathered oil shocks, terrorist attacks, global recessions, and most recently, a pandemic that nearly brought global travel to its knees. Yet we stand here today to be transformed, tested, and more dynamic than ever.

HOW IT WAS: THE FOUNDATION YEARS

Traditionally, the leading hotel brands were companies that truly embodied the hospitality business – they built, owned, and operated their hotel assets. The big brands were as much real estate companies as they were hospitality brands. To these companies, real estate was a steady, predictable, and safe business, with modest upside potential. After all, how many other investments could you make that would yield 7-10% with a risk of loss that was next to zero?

Profit growth came from rising RevPAR and F&B margins. Not many considered optimizing profit per square foot or how to monetize every inch of space. Sales were generated by networking and deal-making in the conference room. Customer loyalty was built on name recognition and the goodwill of the front desk, not on comprehensive, data-driven analyses of how much a guest spends across the portfolio.

Those times are ancient history.

HOW IT IS: ASSET-LIGHT, DATA-RICH, AND MARGIN-TIGHT

In the current market, the predominant hotel brands have transformed into asset-light global operators. They have transitioned from ownership to management. The core business is no longer about owning and operating hotels, but rather about managing brand systems, loyalty platforms, and fee structures. The guest loyalty programs of the big hotel companies are not just engines of illusions and aspirations for the countless travelers navigating the constraints of mid-tier status (you, dear reader, may be among them); they are also engines of investor value and lead generation.

This shift has changed the distribution of power. Hotel chains concentrate on growing their memberships and planting their brand flags, while they shift the operational and financial responsibilities over to franchisees and real estate investors.

For the chains, the goal is to collect the royalty checks – usually somewhere between 8 and 12 percent of gross room revenue, with much of what's paid for marketing, technology, and reservations counted in the price. For hotel owners, though, the math just gets tougher.

Today's investors look to real estate first and don't mind paying good money for it. They are yield-driven and risk-sensitive. When it comes to hotels, they see them as financial instruments. They value them on CAP rate compression and not much else. And with the cost of capital rising sharply – particularly over the past two years, NOI optimization is more than important; it's essential.

People now converse about GOPPAR (gross operating profit per available room) more than they do about RevPAR. And certainly, less is said these days about profit per square foot. But every square foot of the building – and indeed every square foot of space in the physical plant that house buildings, and the virtual plant of any hotel business – remains under the financial microscope.

- Is there a way to earn money from the ballroom?
- Is it possible to change the way back-of-house space is being used to convert it into either short-term storage or retail?
- Does the rooftop contain an F&B concept that stimulates both positive cash flow and enticing brand buzz?

TODAY'S REVENUE AND PROFIT STORY

Revenue management has become a multidimensional function, integrating space optimization, spa, golf, F&B, parking, and channel mix profitability. AI tools have a major role in this. They offer real-time, demand-sensitive pricing models that maximize yield while minimizing labor dependency. Add to the mix, the power of new Revenue & Profit Operating Systems Platform which role is to assist uncovering every business opportunity from top line revenue to gross operating profit.

Artificial intelligence and profit automation are helping to fill the labor gap and are reducing fixed costs in operations. Predictive staffing, dynamic scheduling, smart energy systems, and robotics in housekeeping or food and beverage prep are delivering measurable lifts in net operating income.

Sales and marketing teams have become commercial strategists who use data to identify high-margin customer segments; to optimize channel costs; and to convert loyalty into a repeatable, trackable return on investment.

At the same time, budget-conscious asset managers have fallen for a seat at the capital-structure table, pouring over performance audits and lease-back valuations with a newfound intensity. Even the most obscure brand-ROI analytics have come under their glare.

These stereotypes of the capital stack may be even less willing (and able) to part with rights for the sake of a revenue stream.

WHERE IT'S GOING: THE NEXT DECADE OF HOSPITALITY

The future of hotels will be less about the physical and more about the digital, less about rooms and more about return on investment.

Ongoing CAP rate compression can be expected for high-performing properties located in major markets. However, this compression will likely be confined to those properties which possess a well-defended margin structure and some appreciable upside potential. Such properties will include those with low fixed costs, a strong brand affiliation, and a well-documented record of operating efficiency. On the opposite side of the spectrum, properties which are underperforming (or which have functional obsolescence issues) will find it much more difficult to get anything approaching favorable underwriting. These properties are also subjected to some virtual downward valuation pressure.

Companies will continue to make loyalty platforms their core value proposition to both consumers and investors. These platforms allow for better leverage in negotiations, reduce reliance on OTAs, and direct a ton of leads to owners around the world. The more "powerful" the loyalty engine, the more competitive the flag becomes.

For their part, investors will need to look for:

- Break-even periods that are shorter,
- Payback periods that are faster.
- Possibility of converting or repurposing a building for use other than what it was originally designed for while retaining its historic features.
- Management contracts that are light on fees or franchise terms that are favorable to the owner.
- Models of operation that are enabled by technology.

Every single square foot will count. Look for these things to be in place:

- Spaces for electric vehicles mean that parked vehicles converted to tech lounges or valet monetization spaces come as close to the possible parking of personal EVs. In other words, accompanying space must accommodate the charging of said personal EVs.
- Co-working pop-ups or vending kiosks have replaced dead retail storefronts.
- Food and beverage places of business that function in separate segments to increase their earnings for 18 hours.

In terms of operations, the separation between departments will fade. Revenue, marketing, and operations must act as one – unified by integrated KPIs and real-time dashboards. Labor models will evolve toward flexible, gig-based, or cross-trained teams, with AI scheduling platforms taking the place of old-school foremen.

Every aspect of the hotel will feel the influence of AI, from voice-activated rooms to machine-learning guest profiles and automated procurement.

FINAL THOUGHTS: LEADING THROUGH CHANGE

We can say this after 50 years: the fundamentals – hospitality, consistency, and stewardship – have not altered. What has altered is the way we deliver them, the way we measure them, and the people we answer to.

The winners in this next stage will be those who mix innovation with discipline, growth with efficiency, and technology with human touch. Whether you're a brand leader, an asset manager, a corporate officer, and hotel manager or a front-line employee, you're part of the same system. One that serves, one that performs, one that has the right tech-stack, and one that innovates.

The hospitality business is no longer static; it is changing. It will be the next half-century writers who figure out which kind of change will stick. Are you ready?



HYB



The Hotel Technology Paradox: More Present Yet Less Visible

Hotel Technology

Alan Young
VP, Strategy / Hospitality, Infor



Luxury isn't loud. It doesn't announce itself in flashing features or complicated tech. True luxury in hospitality whispers through anticipation, intuition, and the kind of personal touches that make a guest feel not just welcomed, but understood. It's not about the opulence of the building or the buzzwords on the website. It's about how effortlessly everything unfolds. Behind the scenes, there's powerful technology doing the heavy lifting. But on the surface, what the guest experiences is something far more human: calm, confidence, care. In this article, we'll explore how the best luxury properties use invisible systems to create unforgettable, seamless moments. Moments where service feels less like service and more like being seen.

Luxury in hospitality transcends the conventional measures of star ratings or thread counts. What truly defines a luxury property is the ability to create deeply personal, anticipatory, and seamless experiences that leave guests feeling uniquely valued. Unlike standard hotels that focus primarily on providing comfortable accommodations and basic amenities, luxury properties establish emotional connections through meticulous attention to detail, hyper-personalization, and a level of service that anticipates needs before they're articulated.

Last month, I had the privilege of experiencing true luxury hospitality during my stay at Kruisherenhotel Maastricht, a remarkable property in the Oostwegel Collection. Nestled within a 15th-century monastery and church, this architectural marvel seamlessly blends historic grandeur with contemporary luxury. What struck me most wasn't just the stunning setting, but how effortless every interaction felt.

From the moment I arrived, staff greeted me by name, remembered my preference for still rather than sparkling water, and had already arranged a late checkout knowing my meeting schedule. This wasn't just service – it was anticipatory care that made me feel genuinely valued.

As someone who has spent years immersed in hospitality technology, I couldn't help but appreciate the invisible systems working behind the scenes to create this seemingly effortless experience. This perfect fusion of human touch enhanced by technology represents the future of luxury hospitality.

As technology becomes an essential part of creating exceptional guest experiences, it must also fade into the background. The finest properties understand this balance – technology should empower the experience, not overshadow it.

Today's travelers expect more than just name recognition. They want their preferences to be remembered and anticipated. Whether it's a specific pillow type, a favorite room location, or dietary needs, maintaining detailed guest profiles allows staff to deliver seamless personalization.

Advanced software systems now analyze guest behavior throughout their stay. Did they book a spa treatment last time? Prefer morning tee times? Regularly request extra towels? When staff can act on these details without being asked, the service feels effortless and almost magical.

For hotels, selecting the right technology partner is essential. The best solutions transcend mere software, seamlessly aligning with a property's service philosophy. They should be powerful yet intuitive, sophisticated yet unobtrusive – capable of managing complex data, while adapting to the unique service promise of each property.

And as personalization becomes more sophisticated, so must data governance. Leading properties recognize that privacy protection is itself a luxury amenity, not merely a compliance requirement. This requires technology that not only excels in delivering personalization but also embeds robust security measures to protect sensitive information and comply with global data standards – ensuring every stay is elevated without compromise.

THE INTELLIGENCE LAYER: MAKING SERVICE SEAMLESS

What makes world class service possible is the intelligent application of data. Modern hospitality solutions don't simply collect information – they decipher patterns, predict preferences, and enable proactive service.

The difference between a good luxury experience and an exceptional one often lies in this intelligence layer. When systems can identify a guest's preferences before they're explicitly stated, magic happens.

The intelligence layer also allows for personalized recommendations and experiences, tailored to each individual guest. By analyzing data such as past purchases, preferences, and interactions with the hotel, the system can suggest activities or amenities that are likely to be enjoyed by the guest. This not only enhances their stay but also creates a sense of being genuinely understood and valued as an individual, rather than treated as just another reservation.

AI-driven forecasting tools can now help predict occupancy trends, allowing properties to allocate resources efficiently. Automated housekeeping management systems optimize room readiness times, ensuring arrivals are never delayed. When a concierge receives a specific request, they can instantly pass details to housekeeping or the kitchen via a unified platform, ensuring every touchpoint is aligned with guest expectations.

The truth is, the most impressive technology works quietly in the background, removing friction and enabling human connections. Some examples include:

- Integrated room systems that adjust automatically based on guest preferences and occupancy.
- Real-time AI insights equip staff with real-time data on guest preferences and schedules, enabling highly personalized greetings and proactive service.
- Mobile check-ins and digital concierge services ensure convenience without sacrificing elegance.
- Communication tools that ensure staff know about special occasions or requests without guests having to repeat themselves.
- Predictive maintenance systems that prevent disruptions before they affect the guest experience.

When I requested a late checkout at Kruisherenhotel Maastricht, there was no typing, no checking of systems – just a genuine smile and immediate confirmation. The technology enabling that seamless response remained completely invisible to me as a guest.

THE FUTURE

As we look forward, the relationship between luxury hospitality and technology will continue to evolve. We may see more biometric recognition replacing traditional identification, predictive analytics anticipating guest needs based on external factors like weather or travel disruptions, and voice technology creating new ways to deliver service discretely.

Yet regardless of these advancements, the fundamental principle will remain unchanged: in luxury hospitality, technology exists to enhance human connections, not replace them. The most successful properties will be those that embrace innovation while keeping it elegantly behind the curtain.

Want to know if you're truly delivering ultimate experiences?

It's not when guests compliment your technology. It's when they don't notice it at all.

It's when they simply remark on how understood and valued they felt.

That feeling, that connection, is the true measure of luxury – powered by invisible systems working in perfect harmony with exceptional staff.

My experience at Kruisherenhotel Maastricht reminded me of this essential truth.

We don't create technology to showcase innovation. We create it to make human connections possible at a scale and depth previously unimaginable.

The future of luxury hospitality isn't about more technology. It's about making technology disappear completely.

That's the invisible revolution. And it's already here.

Are you ready?



HY8



Doing More With Less: The New Reality For Hotel Profitability

Operations

Sandrine Zechbauer
Chief Marketing Officer, RMS



Labour shortages and global uncertainty are putting serious strain on hotel operations. Margins are tighter, expectations are higher, and operators are being asked to deliver more with fewer resources. In this environment, technology is no longer a nice to have. It is essential. From automation to integration, the right tools can help you streamline operations, improve the guest experience, and protect your bottom line. Here is a practical look at what to do and what to avoid when using tech to ease the pressure and run a smarter, more efficient property.

With ongoing labour shortages and a tense international climate, hotel margins are under intense pressure. Property operators are being forced to do more with less – streamlining operations, boosting efficiency, and making every tool in their tech stack work harder.

Here's a practical look at the do's and don'ts of using technology to relieve some pressures, elevate operations and save valuable time along the way.

1 DO INVEST IN YOUR BOOKING ENGINE

Today's travellers are deeply connected, relying on technology at every stage of their booking journey.

If your business traditionally relies on OTAs that eat up your margins, 2025 might be the year to turn that around. A powerful, robust booking engine can help you drive more direct bookings and reclaim control of your margins.

A well-designed booking engine allows guests to:

- Browse real-time availability via calendar view
- View property photos
- Purchase add-ons and upgrades
- Access flexible rates and promotional offers
- Complete secure, seamless payments

Look for a solution that integrates directly with your PMS to ensure live availability, accurate pricing and a streamlined user experience. And make sure it is mobile optimised, as most of your guests will be booking from their phones.

2 DO ADOPT A PROPERTY MANAGEMENT SYSTEM

Adopting a Property Management System (PMS) that you trust is essential for delivering a frictionless guest and staff experience. From reservations and mobile check-in and -out to real-time pricing updates, a good PMS brings everything into one place.

With automated bookings, instant communication, and efficient workflows, a Property Management System (PMS) enables you to consistently exceed guest expectations. When your guests feel appreciated, supported, and in control throughout their visit, they're more likely to return and to spread the word.

Your staff will benefit, too. With mobile access from a phone or tablet, they can respond to customer queries on the move without being tied to the reception desk.

3 DON'T UNDERESTIMATE GUEST LOYALTY

You don't need to be part of a global hotel chain to reward guests for their loyalty. Most PMS platforms include built-in loyalty features letting you credit points or offer discounts based on nights stayed or total spend. These loyalty programs are easy to configure and set up.

Combined with special offers and promotions, loyalty programs are a powerful way to drive repeat bookings and shift more traffic to your direct channels. That means fewer OTA commissions and stronger guest relationships. For best results, consider exclusive rates, early access to bookings, and thoughtful extras that show guests you value their return.

4 DON'T USE DISCONNECTED TECH SOLUTIONS

Technology should make your life easier, not more complicated. But when you're juggling too many systems without the resources to manage them properly, it will be at best underutilized, and at worst will slow you down.

Disconnected systems mean duplicating work – entering reservations in multiple systems, maintaining separate guest records, and wasting valuable time on admin.

Without a dedicated resource such as a tech manager, think about how you can consolidate your technology into one robust system that can handle key tasks within a single platform. The more streamlined your stack, the more efficient your operation.

5 DO USE A CHATBOT TO SUPPLEMENT YOUR RESERVATION TEAM

AI-powered chatbots are gaining traction across industries and we are now starting to see the first few chatbots specifically designed for hospitality. A well-built chatbot can:

- Handle guest questions and create a booking directly in your PMS
- Answer your most frequently asked questions such as "When can I check in?" or "Do you offer breakfast?" thus freeing up staff for higher-value tasks
- Be a resource when your reception is closed

6 DO AUTOMATE REPETITIVE TASKS

Adding a manual charge on hundreds of invoices, anyone?

So much of your precious staff's time is being wasted on repetitive tasks and away from the core of your business: looking after your guests.

Look closely at what your current tech stack can already automate. Push your vendors' customer success managers to demonstrate how their platform can save you tasks, clicks, or minutes of your time. Also, stay on top of product releases to make sure you are always making the most of the tech stack you already have.

7 DON'T IGNORE EMBEDDED PAYMENTS

Embedded payments aren't a luxury anymore – they are a core part of modern property management.

Night audits and manual reconciliations eat up hours each week. Fraudulent bookings and payment disputes drain revenue and staff morale, but it doesn't have to be this way.

By embedding payments into your PMS, you can streamline operations, cut down on fraud and drastically reduce disputes. Plus, offering guests flexible payment options improves conversion rates and adds a layer of convenience that travellers expect.

It's not just about processing transactions, it's about protecting your margins and delivering a smoother, more trustworthy experience.

With the right tech stack in place, delivering on the automation promises, you will be able to do more with less, and still deliver on your customer experience.



HYB

How Hotel-Brand Tech Leaders Are Redefining the CIO Role

Viewpoint



Technology no longer sits quietly in the background of hospitality - it is the business. And at the intersection of this transformation stands the modern CIO: no longer a systems custodian, but an architect of change, a translator of complexity, and increasingly, a strategist at the very core of decision-making. This shift was tangible at the first-ever [HFTP CIO Summit EMEA in Barcelona](#). What began as a gathering to discuss AI, data, and infrastructure quickly evolved into something more profound: a shared realization that the traditional CIO archetype is dissolving. The role is being reimagined in real-time, fluid, cross-functional, and increasingly guest-facing.

We posed a deceptively simple question to attendees: "How is your role changing as technology evolves?" The answers were not only illuminating but revolutionary. It's no longer about tools - it's about timing. It's no longer about systems - it's about strategy. And it's no longer about tech support - it's about business leadership.



ANDREW EVERS

Group Director of IT, Rocco Forte Hotels

The CIO role has moved far beyond infrastructure. We're no longer just maintaining networks - we're shaping the future of the guest experience. In luxury hospitality, where detail defines value, the convergence of guest service and technology is now absolute. There's no longer a boundary between them.

Today's CIO is expected to contribute to revenue growth, understand business models, anticipate operational challenges, and align digital strategy with brand values. Our influence spans privacy compliance, service design, and commercial outcomes. This is a strategic seat at the table - not a technical one in the server room.

One major focus area for me right now is personalization. We're building a unified guest view - collapsing silos across spa, dining, and accommodation to deliver a seamless experience. True luxury is about relevance, and AI helps us deliver that at scale.

There's a misconception that luxury should be untouched by AI. I disagree. The most refined experiences can be enhanced - not diminished - by intelligent systems. What matters is the orchestration: decisions must remain human, but they should be *informed* by AI. That's what I call 'hand-thought' service - curated by people, powered by data.



MUSTAFA GOKCEN

Global Head of Information Technology, Cheval Collection

Technology has become central to our business planning. IT is no longer a support function - it's a strategic pillar. I'm increasingly involved in shaping commercial roadmaps, evaluating distribution platforms, and making long-term investment decisions. My agenda isn't about fixing issues tomorrow; it's about anticipating what technology will define us three to five years from now.

The real power of AI isn't in flashy front-end features, but in what it enables behind the scenes. Automating routine back-office tasks frees up our teams to focus on what truly drives value - deeper financial analysis, revenue optimization, and

strategic foresight. This shift is essential if we want to scale efficiency sustainably.

Yet, the greatest barrier to progress remains integration. We manage over a hundred platforms, many of which still operate in isolation. Until we break down those silos and create a unified data ecosystem, we're only scratching the surface of what's possible. Innovation without integration is just noise. To build intelligence, we first need coherence.



LEON SMALLBONE

Assistant IT Director, Firmdale Hotel Group

We're witnessing a cultural shift in how technology is adopted within hospitality businesses. End users are increasingly tech-literate - they're evaluating tools on their own, consulting peers, and coming to IT with clear preferences. This has fundamentally changed our role.

Where we once dictated systems from the top down, we're now enablers of bottom-up innovation. Departments are selecting platforms that suit their needs, and IT's task is to ensure security, interoperability, and long-term viability. The result? A more collaborative and engaging environment, where shared ownership of systems aligns everyone toward common goals.

Looking ahead, AI will accelerate this transformation. It can take over manual tasks, deliver intelligent insights through conversational reporting, and help staff make faster, better-informed decisions. This isn't about replacing people - it's about removing friction, freeing up time, and shifting our collective focus from administration to strategy.



TIAGO ALVES

Director of IT Operations /Regional Director of IT, EMEA and APAC Belmond

At Belmond, we're reimagining the role of IT from system deployment to strategic enablement. Our work begins with understanding the operational vision - not just supporting it, but co-architecting solutions that align technology with frontline goals.

Automation plays a crucial role in this evolution. By integrating AI-driven processes, we relieve our staff from repetitive tasks, allowing them to focus on what truly matters: delivering exceptional, human-centered guest experiences. Technology becomes the silent partner, enabling - not replacing - the artistry of hospitality.

A key milestone in our transformation is the development of a proprietary booking engine. Our previous platform limited both innovation and data control. By building our own system in-house, we now own the full stack - from infrastructure to guest data. The engine integrates seamlessly with our website, PMS, and dining systems, creating a unified digital ecosystem.

We've also taken ownership of our API layer, following a philosophy similar to Apple's: when you control both the hardware and software, you can deliver a more refined, consistent, and adaptive experience. For us, that means building a flexible, fully integrated architecture - designed for the future, tailored to Belmond.



FERGUS BOYD
Hospitality Consultant

My journey has taken me from IT and digital into the world of revenue and asset management. Today, I advise at the CXO level, helping businesses bridge the gap between technology, customer expectations, and commercial performance.

Infrastructure alone doesn't move the needle anymore. IT leaders must understand strategy, brand positioning, and guest experience design. The real value lies in connecting the dots - turning technical fluency into business foresight. That requires both analytical rigor and creative thinking.

Not everyone brings that hybrid mindset, but those who do are uniquely positioned to drive meaningful transformation. Many seasoned IT executives should consider stepping into advisory, startup, or board roles, where their insight can shape long-term direction.

If I had to spotlight one technology for the next 12 months, it wouldn't be generative AI - it would be robotic process automation. RPA is practical, proven, and poised for a comeback. Tools like UiPath can streamline repetitive back-office workflows in finance, marketing, and operations. It's the kind of tech that delivers measurable ROI without the hype. While AI steals headlines, RPA gets things done.



ALEJANDRO VIDALES
VP of Technology, OKU Hotels

Our role as technology leaders is becoming increasingly strategic. In a landscape where innovation moves fast, staying reactive is no longer enough. We're expected to identify the right partners, vet scalable solutions, and - most importantly - ensure their seamless integration into the fabric of the business.

There's more visibility on CIOs than ever before. Senior leadership looks to us not just for operational support, but for direction. If you're not proactively shaping the digital roadmap, you're already behind.

At OKU Hotels, we're still a young brand, building our technological foundation from the ground up. That's why my top priority right now is cybersecurity. I'm seeking a unified, end-to-end solution - one that blends fraud prevention, data loss protection, and threat detection into a single, cohesive platform.

Security isn't a back-office concern anymore. It's a business enabler. In hospitality, trust is currency - and safeguarding it requires systems that are both intelligent and resilient.



MARK GAGE
Executive Director of Information Systems, Tanzerra
Resorts

At Tanzerra Resorts, our decentralized structure means each property operates independently - and that's by design. But it also means silos can emerge. Over the past year, my priority has been to break down those barriers through better communication, shared tools, and stronger team cohesion. We've rolled out new PMS and payment platforms, along with

operational tools like ALICE, but the real transformation comes from how people use them.

With a lean team spread across remote locations, my role has evolved from pure IT management to training, coaching, and leadership. I'm investing time in upskilling my staff - not just in cybersecurity, but in operational awareness.

I come from the floor: bellman, F&B, front desk. That background shapes how I lead today. I want my team to grasp the full guest journey, not just the backend systems. When a front desk printer goes down and guests are lining up to check in, that's not a technical hiccup - it's a service failure.

We're training our team to think beyond tickets and uptime, and to respond with hospitality-grade urgency. Technology doesn't just run hotels - it shapes the guest experience. And understanding that is where good IT becomes great hospitality.

ANONYMOUS CIO

Top-5 Global Hotel Group

Technology leadership is no longer confined to infrastructure - it's now embedded in the strategic core of the business. We're entering a phase where transformation is business-led, and technology's role is to support and accelerate that vision.

Today, IT leaders are expected to go far beyond system maintenance. We're actively shaping customer experiences, defining use cases, and contributing to measurable business outcomes. This requires a deep understanding of both the organization's commercial strategy and its operational realities.

One of the most profound shifts on the horizon is architectural: the PMS is no longer the gravitational center of the tech stack. The future is CRM-led. Platforms like Salesforce are enabling unified guest profiles that extend across marketing, sales, and service.

This model puts data at the heart of hospitality. When guest information is centralized and accessible, it can power truly personalized experiences across departments. The PMS will still matter for core operations, but it's no longer the brain - it's becoming one component in a broader, data-centric ecosystem.



JUDI BLAKEBURN
Chief Commercial Officer (CCO), Watergate Bay Hotel

The CIO dimension of my role has undergone a radical transformation. What was once a marginal aspect of my responsibilities has now become central. I'm spending an increasing amount of time exploring technology, running internal pilots, and translating emerging tools into real-world use cases.

AI, in particular, is no longer a buzzword - it's a necessity. With growing business demands and limited team expansion, improving productivity isn't optional; it's strategic. We're actively exploring how AI can support functions like marketing, HR, and even legal. Teams are buried under documents, and the ability of AI to accelerate analysis while enhancing output quality is game-changing.

One colleague recently told me how difficult it is to maintain concentration when reviewing dense documentation. That resonated deeply. AI, when applied correctly, doesn't replace people - it empowers them. It helps us do more, better, with less friction. That's the real opportunity: using intelligent tools to elevate human work, not eliminate it.



MARCO CORREIA

CIO, Mercan Properties

The CIO has become a strategic partner. Two decades ago, IT often reported to finance - today, we help shape the business itself. Our role now spans every department: HR, finance, operations, and even frontline services like housekeeping and F&B.

In Europe, however, regulatory frameworks - particularly around AI and guest profiling - introduce constraints that must be navigated carefully. Innovation cannot come at the expense of compliance. That's why our responsibility isn't just deploying technology; it's enabling *responsible* adoption across the organization.

My focus is on applied AI - specifically, analytical tools that solve real problems. One powerful example is visual-driven room inspections. A housekeeping supervisor can film a room, and AI instantly highlights what's missing: towels, pillows, amenities. It's fast, consistent, and reduces the chance of human oversight. This is not a concept - it's happening.

We need to move beyond the novelty of generative AI and focus on what creates measurable operational value. Analytical AI offers that. It's not about replacing people, but about giving them tools that make quality scalable.





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