

REIMAGINING THE GUEST JOURNEY IN THE AGE OF AI



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Introduction

Artificial Intelligence (AI) isn't just transforming hotel operations; it's redefining what it means to be a guest.

From how travelers discover destinations to how they book and communicate with staff; generative AI is becoming the invisible concierge shaping every moment of the journey. And behind the scenes, agentic AI has the potential to drive efficiencies and automation to make stays even more seamless. Yet even as technology advances, the heart of hospitality remains the same: people still want connection, warmth and care.

The hotels that succeed in this new era won't be the ones that automate everything, but the ones that understand where the human touch matters most, and how AI can enhance it.





This whitepaper explores the next era of hospitality. Whether you own, manage, or work in a hotel (or simply want a glimpse at the new guest experience) these insights will help you navigate the opportunities and pitfalls of AI-powered transformation.

Drawing on the perspectives of eighteen industry experts, we tested a series of scenarios through in-depth surveys, measuring their likelihood, impact, and desirability. The full findings reveal how emerging technologies will revolutionize guest journeys from search to stay, and what it takes for hotels to thrive amidst this wave of change.



A new backbone of intelligence

Let’s first clarify four key levels of Intelligence:

 AUTOMATION	Relies on static, rule-based systems that follow simple logic. If X happens, then do Y.
 MACHINE LEARNING	Learns from data to improve its output over time. It learns patterns and makes predictions, though still requires human direction.
 GENERATIVE AI	Creates new outputs (like text, images or code) based on patterns learned from vast datasets. It’s capable of reasoning and producing original responses but typically needs a human to initiate and guide each action.
 AGENTIC AI	Connects to multiple systems through APIs to set goals, plan and execute tasks autonomously, often collaborating with other systems or agents. Instead of waiting for instructions, it acts proactively within defined parameters to achieve desired outcomes.

These levels are converging to reshape the guest experience at every touchpoint.

Five key insights

Five key insights from our research that every hotelier should keep front-of-mind when planning for the new era:

01 DISCOVERY AND BOOKING WILL CHANGE FOREVER.

The guest journey is evolving into a single conversational flow by Generative AI, where your hotel's visibility will be defined by the quality of your data and the openness of your APIs.

02 A CHANCE FOR HOTELIERS TO OWN THE GUEST EXPERIENCE.

The rapid rise of Generative AI offers new levers to win direct bookings, but only for those investing in differentiating factors like bookable services. Allowing for greater personalization during booking will help hoteliers compete with OTAs.

03 AGENTIC AI BEGINS BACK OF HOUSE.

Agentic AI will change hotel operations. Expect early wins in back-office operations, guest communications, and housekeeping, provided robust integrations and clear guardrails are in place.

04 STAFF ROLES WILL EVOLVE, NOT DISAPPEAR.

Automation will free teams from transactional chores, allowing staff to focus on high-impact, human interactions. The real winners will know where to preserve the magic of service.

05 2026 IS A TURNING POINT.

The next year offers a window to align your tech stack, data, and training for AI-powered growth. Our report lays out a four-step roadmap to guide your journey.

EXPLORE MORE

In this paper you'll find deeper dives into each idea, including actionable checklists and practical examples.



SOPHIA

TRAVELER

Exploring the future of the guest journey

MEET SOPHIA, OUR TRAVELER.

Sophia is looking to book her dream holiday. She wants to take a two-week road trip through Italy, visiting Rome, Naples and Florence. She's excited about discovering history in Pompeii, the amazing architecture of Rome, and the natural beauty of Tuscany.

Let's follow her into 2035 where AI is fully embedded into the travel experience.



SECTION 1

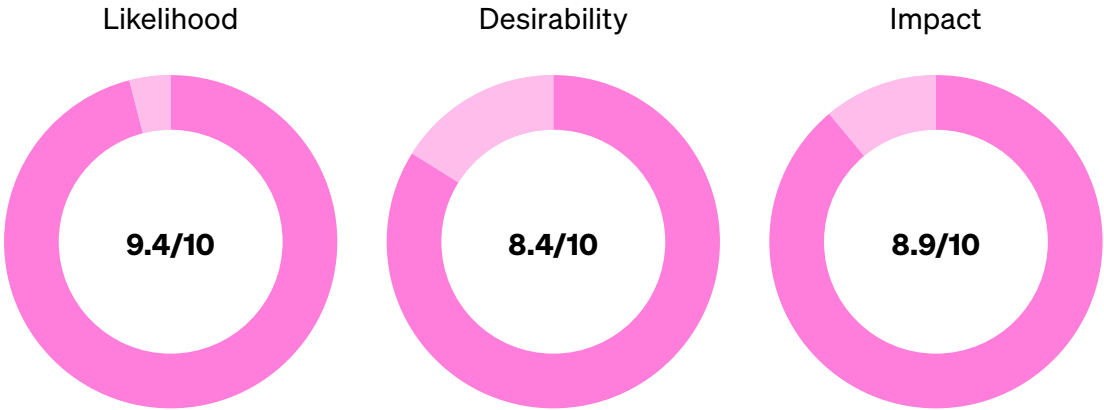
Generative AI

The new frontier in search and booking

SCENARIO

“In the next 10 years, generative AI chatbots like ChatGPT, Perplexity and Claude will fully integrate travel ecosystems, allowing guests to book hotels, flights, local transport, and experiences in a single transaction using AI-curated itineraries.”

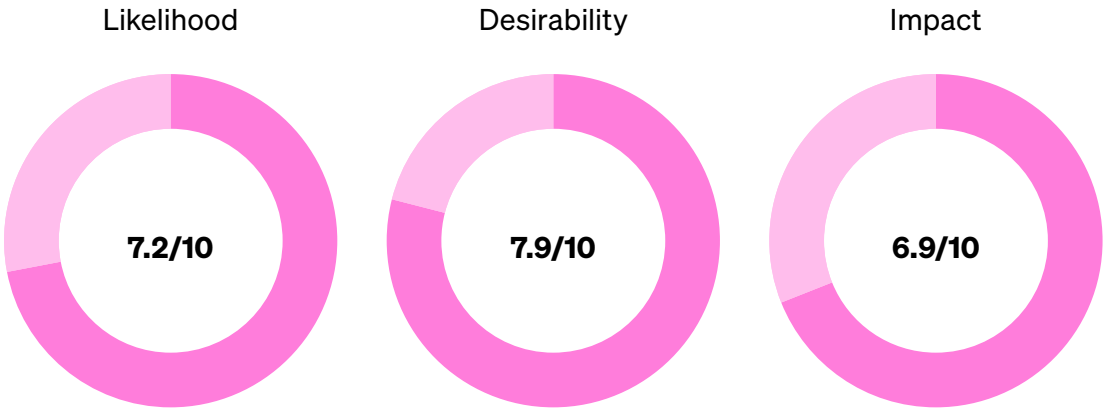
EXPERT VIEW



SCENARIO

“In the next 10 years, hotels will routinely access guest flight and taxi data (with consent) to dynamically adjust check-in/out times, room readiness, and airport transfers. This will be a major boost to personalization.”

EXPERT VIEW

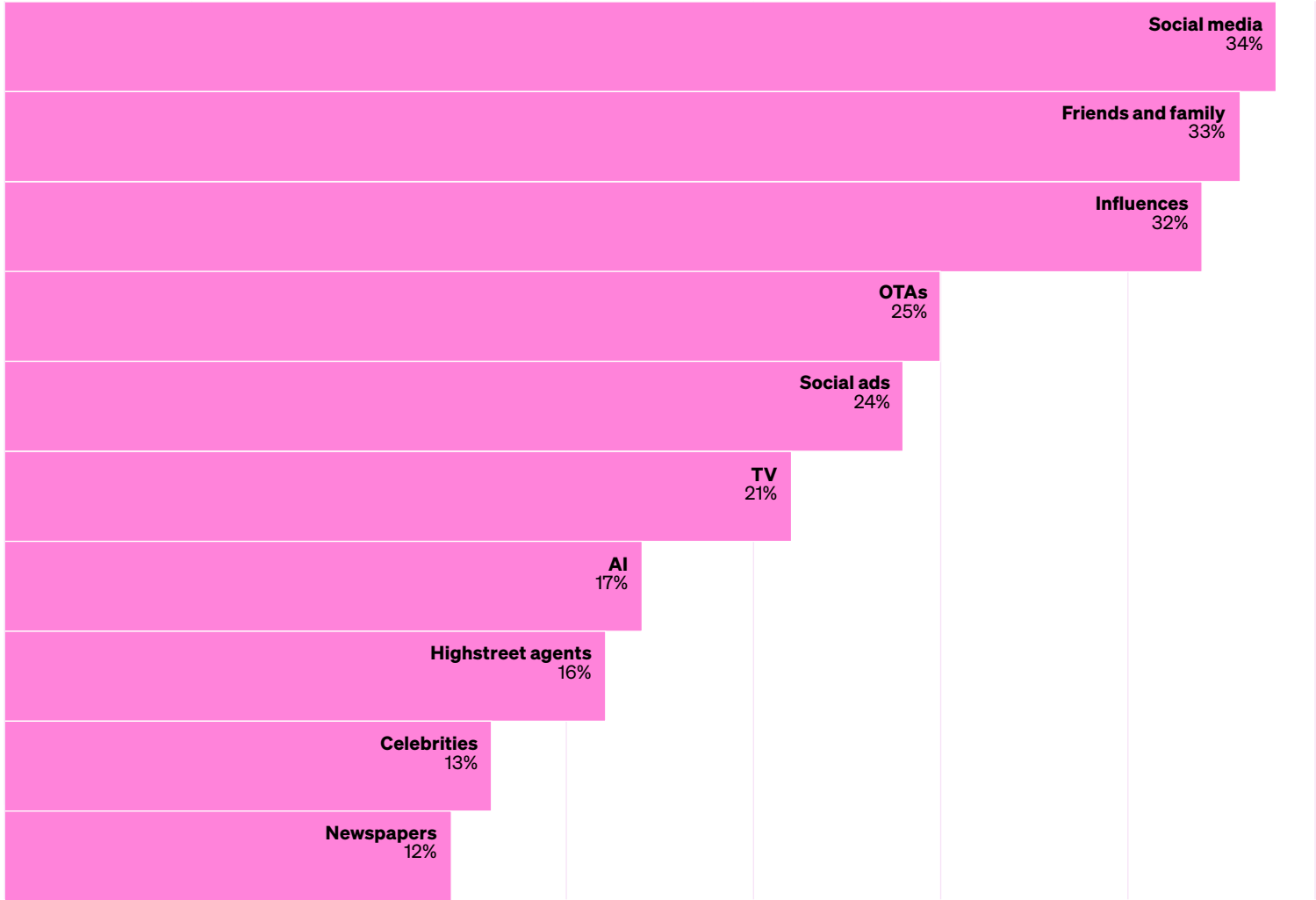


1.1 Discoverability through AI

The way guests search and book hotels has changed dramatically over the past decade. Social media is now a bigger source of inspiration than recommendations from friends and family, and most discovery today happens online, with guests comparing options across multiple channels, from social ads and influencers to OTAs and search engines. These platforms have become the gatekeepers of guest intent.

But the search experience is evolving once again. It’s moving from lists and filters to conversational, intelligent discovery, more akin to receiving recommendations from a trusted friend. AI is the fastest growing source of inspiration.

TOP SOURCES OF TRAVEL INSPIRATION



1.2 The rise of conversational search

Generative AI (GenAI) combines the power of online search with the conversational exchange of personal recommendations. Unlike traditional search engines or OTA filters, GenAI platforms don't just retrieve data, they understand context, intent and preferences, and respond in natural language to complex travel questions.

Travelers can now describe their dream trip ("a weekend spa retreat within three hours of London with great vegan food") and receive curated itineraries in seconds.



29%

**Of Americans use
AI for travel research.**



21%

**Trust AI to build
detailed itineraries.**

Skift Research and seoClarity found that in April 2025, 3% of Google hotel searches included an 'AI overview' – an AI-generated summary at the top of search results, aggregating information from multiple sources. This percentage is quickly increasing.

Meanwhile, Expedia partnered with Perplexity to launch Comet, an AI-powered browser and assistant featuring a dedicated travel interface that helps users discover and plan trips.

SOPHIA**TRAVELER**

Sophia starts talking to her personalized agent on ChatGPT. The agent already knows her preferred accommodation types and budget, so asks further clarifying questions.

**SOPHIA**

Could you give me a travel itinerary for a 2-week road trip through Italy? I want to see Rome, Naples, Florence... learn the history of Pompeii, and enjoy Tuscany's natural beauty.

**PERSONALIZED AGENT**

Absolutely, Sophia! Before I build the route - I see your calendar is free between the 3rd and 25th of June. Any specific dates you would like to travel?

**SOPHIA**

I'm flexible.

**PERSONALIZED AGENT**

Perfect. And how would you like to travel between cities — rental car, trains, or a mix?

**SOPHIA**

Let's do a rental car. I want the freedom to explore Tuscany.

**PERSONALIZED AGENT**

Great choice. I'll optimize the whole route for minimal driving time and scenic stops. Here's a full itinerary with hotels, activities, estimated costs, and pre-booked time slots for Pompeii...

She gets a plan that's fully worked out and asks the agent to book. The agent handles all the administrative hassle for her.

Expert panel

Discovery and search are the stages of the travel journey where our expert panel observed the greatest impact from AI today, but booking capabilities are rapidly becoming part of the same seamless experience.

IMPACT OF AI ON STAGES OF THE TRAVELLER JOURNEY

	Very low	Low	Medium	High	Very high
Discovery	0%	0%	0%	19%	81%
Search	0%	0%	6%	25%	69%
Booking	0%	0%	31%	25%	44%
Pre-stay	0%	6%	25%	31%	38%
In-stay	0%	13%	44%	25%	19%
Post-stay	6%	13%	44%	25%	13%

In October, ChatGPT introduced its browser, Atlas, enabling automated travel reservations. It’s only a matter of time before other large language models (LLMs) follow suit.

As shown above, there is strong consensus amongst our panellists about the inevitability of AI chatbots such as ChatGPT, Perplexity and Claude fully integrating travel ecosystems, enabling guests to book hotels, flights, local transport and experiences in a single seamless transaction. At the current pace of innovation, this future will likely be here sooner rather than later.

1.3 Search and booking in 2035

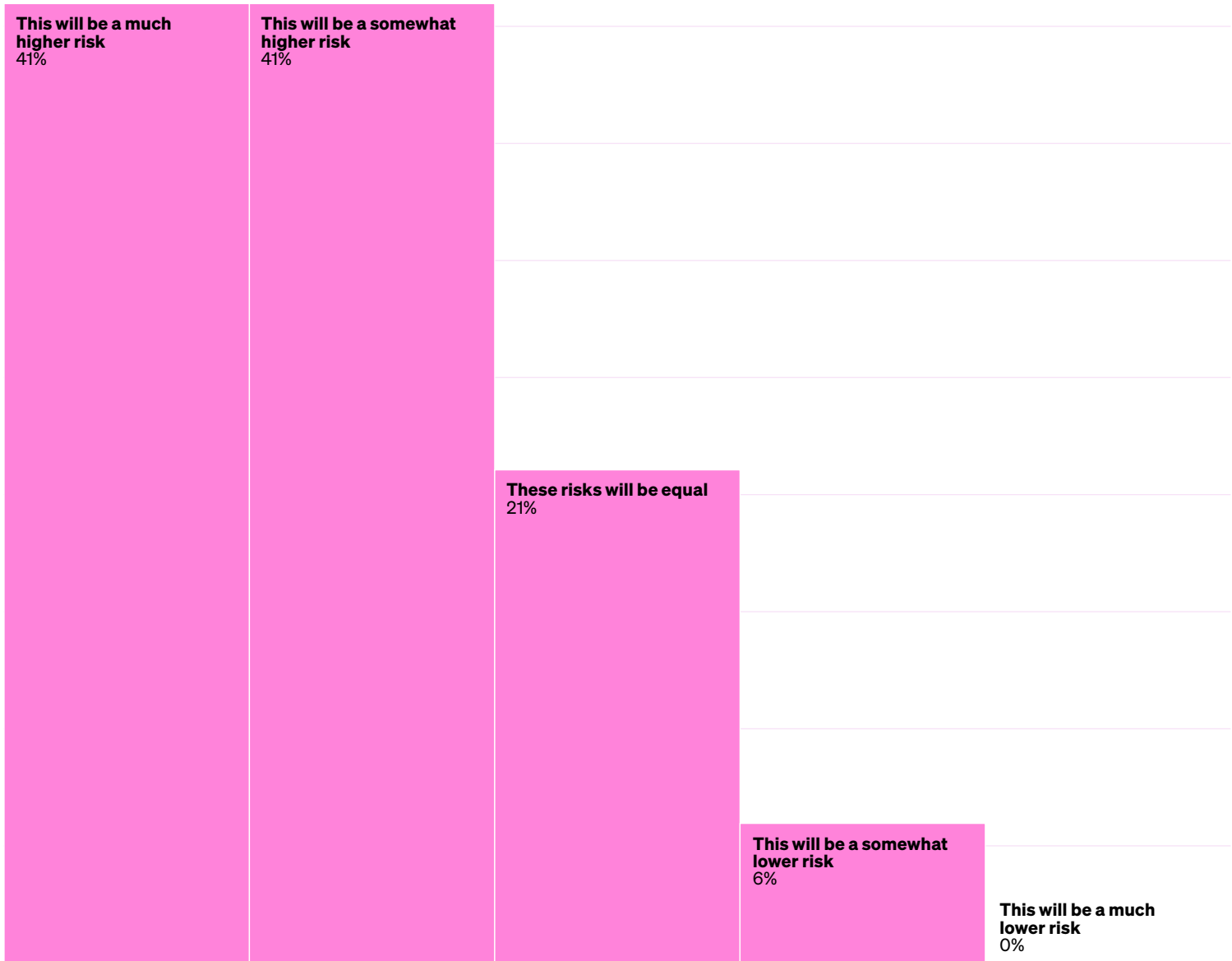
1.3.1 DATA PIPELINES

As booking journeys collapse from dozens of touchpoints into a single AI conversation, hotels risk losing visibility and control. The question becomes:

How do hotels position themselves to win bookings when AI intermediates the relationship?

EXPERT PANEL

“In the coming years, how concerned should hoteliers be about control and accuracy of hotel product representation of AI-generated outputs, compared with traditional risks like rate parity or visibility?”



What our expert panel says

If hotels fail to manage their data, they will be invisible.

Chris Hemmeter
Managing Partner,
Thayer Investment Partners



Early signs are that some GenAI platforms are initially solving the book and pay experience with aggregators (Shopify/Etsy) rather than allowing brands/merchants to represent themselves or open it up to fast moving tech platforms - I believe the technology is there for this to evolve into a level playing field where any hospitality provider or tech partner can become the source of content, availability, pricing and payment.

James Lemon
Hospitality, Travel & Leisure
Global Lead, Stripe

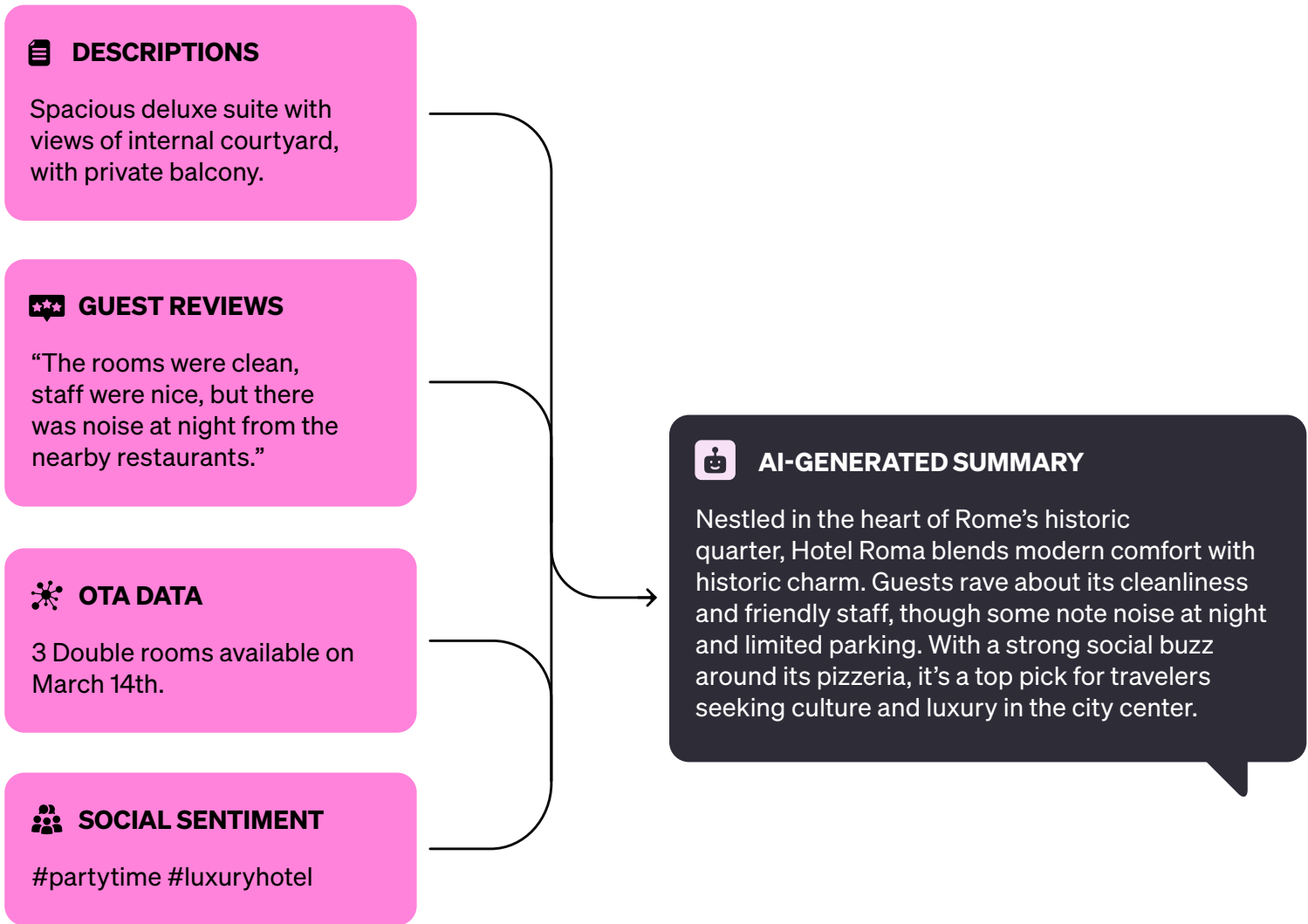


Structured data in, unstructured data out.

In the future, a guest’s first impression of your hotel may not come from your website, but from an AI-generated summary. One that blends your property descriptions, guest reviews, OTA data and social sentiment into a single narrative.

For GenAI to provide its natural-language response, **well-structured data is critical.**

Providing clear information, such as fact sheets and Q&A-style answers to common questions, helps ensure accuracy and consistency. AI search favors fact-based content and struggles with information conflicts across different sites.

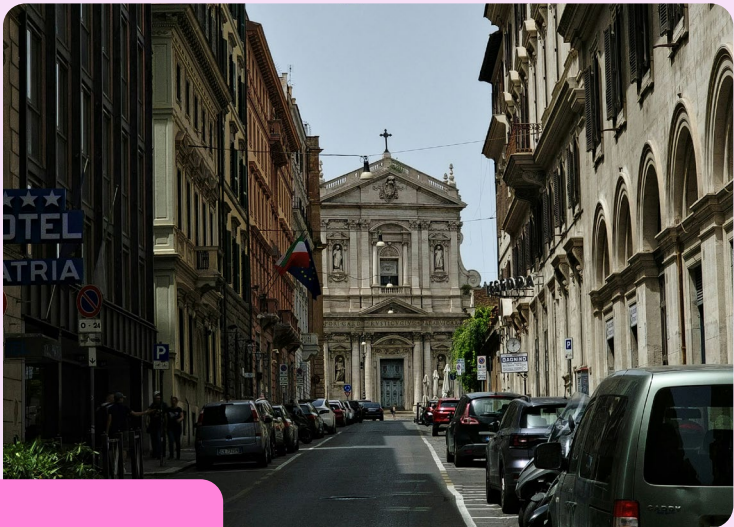


SOPHIA

TRAVELER

Sophia’s agent chooses Hotel Roma for her stay in Rome.

The hotel has an integration with Booking.com and does most of its business through third-party channels, so the agent books the hotel using Booking.com.



Booking.com



PERSONALIZED AGENT

book 4x nights



BOOKING CONFIRMED!



1.3.2 LOYALTY PROGRAMS

AI-driven search also raises questions about brand loyalty.

Will GenAI recognize and prioritize a guest’s loyalty status? Or will loyalty programs lose influence in favor of more objective factors such as location, price and amenities that are personalized to the traveler’s experiential preferences?

As researchers at Florida Atlantic University have noted: ‘AI agents will be the new gatekeepers of loyalty. The question is no longer just ‘How do we win a customer’s heart?’ but ‘How do we win the trust of the algorithms that are advising them?’

And AI assistants might select a property based on structured data (price/ amenities/ availability) rather than brand story, making consistent and AI-ready content more important.

EXPERT PANEL

Our expert panel was divided over the role of loyalty programs in a GenAI future.

“How might GenAI and AI assistants influence guest loyalty and the role of loyalty programs?”



What our expert panel says

Points-based loyalty is dead. Hotels that operationalize experiences are going to win guests over instead.

Bryson Koehler
CEO, Revinate



If you ask your AI bot to book for you, and it knows you're with Marriott Bonvoy, it will restrict search to Marriott only, so the value of loyalty programs will increase.

Luca Bovone,
Founder, Habyt,
Habyt and Atipico Hotels



Loyalty shifts from 'points' to practical, context-fit value. Travelers stick when perks match the trip, not just the brand. Ecosystem loyalty grows: unified, cross-vertical rewards pair with AI planning, favoring platforms that can reward the whole trip. Direct chain loyalty remains strong (especially in the U.S.), while bank/credit-card portals gain influence. AI will route to whichever option is most relevant and valuable for that specific trip.

Roemer Visser
Global Head of Managed
Partnerships, Booking.com



SOPHIA

TRAVELER

For her stay in Naples, Sophia's agent discovers a LuxSuite hotel, of which Sophia is a loyal member.

As her agent converses with hotel agent, the hotel's AI agent, it relays information about Sophia's membership status and her preference for a room on a higher floor with memory foam pillows.

**PERSONALIZED AGENT**

Hi Marco, booking Sophia Reyes for June 14–18.
Any availability?

**HOTEL AGENT**

Yes — and I see she's a Gold member. Shall I apply her usual preferences?

**PERSONALIZED AGENT**

Yes. High-floor room, memory foam pillows, and early check-in if possible.

**HOTEL AGENT**

All set. Early check-in approved, preferences applied.

**PERSONALIZED AGENT**

Great. Confirm the reservation and send the details my way.

This information triggers an automation in the hotel system to upgrade Sophia to a room on the top floor, and a message is sent to housekeeping staff prior to arrival to prepare her pillows.

When Sophia arrives, she's beyond delighted that she didn't have to cash her loyalty points in at the front desk to arrange this herself – she can just head straight to her top-floor suite, where she'll sleep soundly.

In an AI-driven ecosystem, relevance may trump recognition, and the hotels that provide the richest, most structured data will surface first. And with built-in automation, hoteliers can reward loyalty members with upgrades or personalized perks to ensure loyalty programs remain relevant.

1.3.3 OTAS VS HOTELS

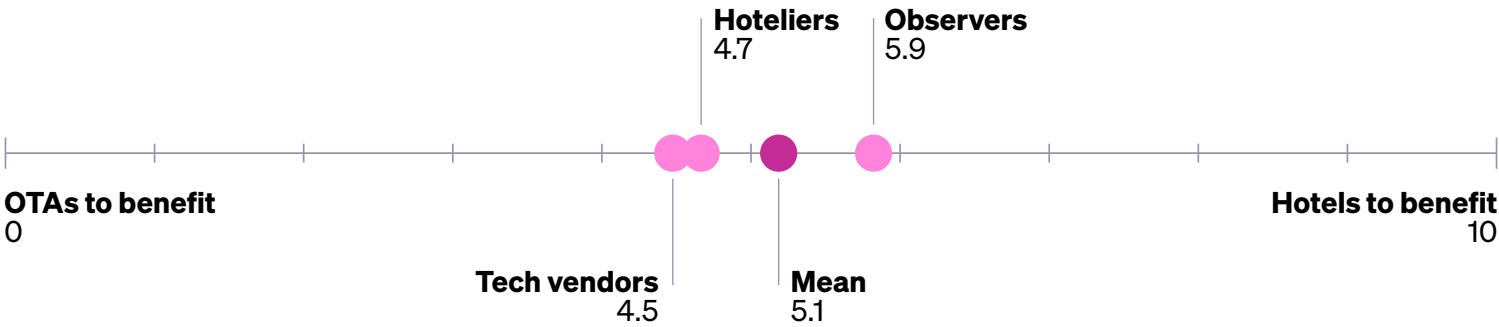
Where there are winners, there are inevitably losers. Over the past decades, the pendulum has swung back and forth, but OTAs have captured a significant share of revenue in exchange for broader distribution.

How can hotels ensure that history doesn't repeat itself?

EXPERT PANEL

 Voter type and average score

“On a scale from 0 to 10, who do you think has the net advantage when AI-enabled booking experiences become the norm?”



The expert panel did not take a clear stance on who will come out ahead once AI-enabled bookings becomes the norm. With no obvious favorite, the advantage is still up for grabs for those who prepare early and thoughtfully.

What our expert panel says

If chatbots source rates and inventory directly from the PMS, this could drive a renaissance in direct bookings, bypassing OTAs. But if OTAs own the integrations and data pipelines into AI platforms, they'll retain their dominant role. In reality, I expect a hybrid outcome.

H. Anthony Gambini
CEO & Founder, Premiere
Advisory Group



Hotels will win if they can build meaningful partnerships with other elements of the guest journey, not just those impacting their stay but, for example, credit card companies.

Leila Jiwnani
Head of Hospitality & Leisure
Advisory, Deloitte



Hotels will win if AI enables hotels to deliver hyper-personalized direct booking experiences: real-time room customization, predictive pricing and conversational service before, during and after booking. That makes direct channels far more competitive, with more personal interactions than an OTA can provide.

Chris Andre Pedersen
CEO, Kronengruppen SA



Generative AI could offer a reset, and ancillary services could be the key to swinging the pendulum back in favor of hotels.

OTAs still struggle to capture the entire guest journey. For instance, guests booking a spa retreat through an OTA often still need to contact the hotel directly to reserve treatments.



Hotels can gain a competitive advantage by making every service and space (rooms, dining, spa, coworking) bookable through their own engine. Direct bookings also enable smarter upselling and attribute-based selling, allowing hotels to personalize offers and increase revenue.



Ultimately, hotels that invest in connected systems, structured content and AI-ready data pipelines today will be best positioned to earn both guest and algorithmic trust, capturing more demand, deepening relationships, and retaining control over the experience.

TRAVELER

For Sophia's stay in Florence, Hotel Firenze has invested in a direct booking strategy where it offers ancillaries and options that are only available on its own channels.



Co-working

BOOKINGS

- ✓ Room
3x nights
- ✓ Restaurant
5-course meal experience

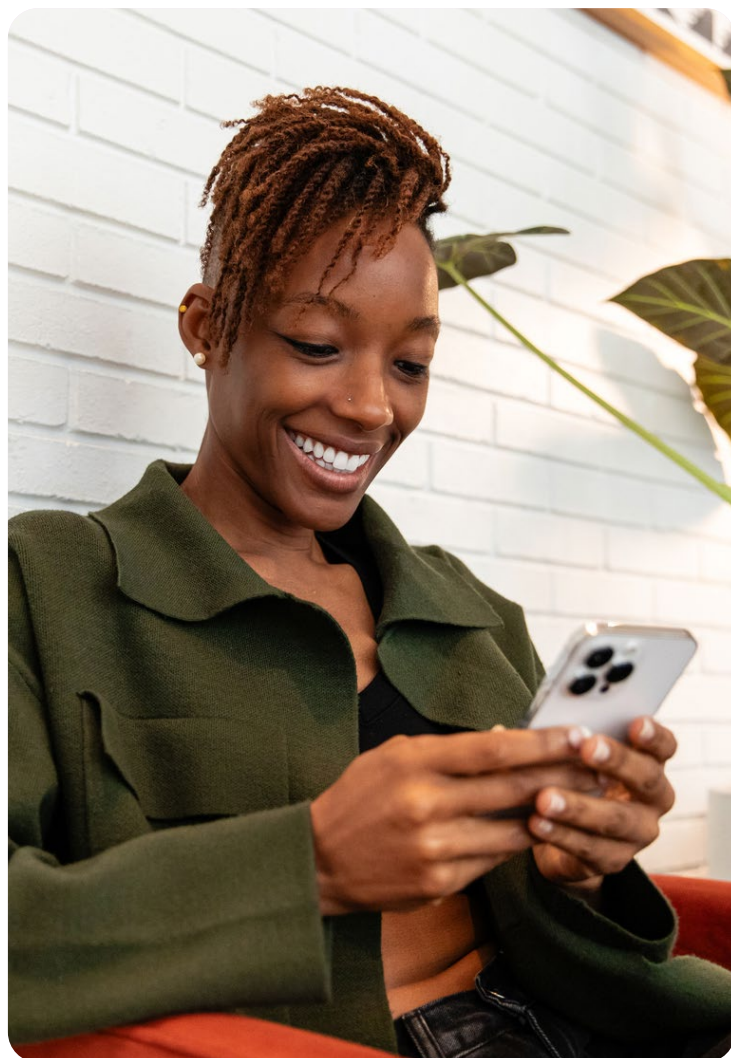
As her AI assistant knows that Sophia is a foodie, it chooses to book the experience through the hotel's direct booking engine, and adds a highly reviewed 5-course meal experience in the hotel restaurant to her booking.

Then start compiling your top 50 guest questions, along with clear, consistent answers that AI assistants can reliably reference.

1.4 What to expect from your tech stack

Generative AI is transforming how guests search, compare and book. A hotel's visibility in this evolving landscape will depend on the quality and connectivity of its data.

Robust integrations, supported by an open API infrastructure, are not just operational choices. They're essential to ensuring your property appears in AI-driven discovery and remains part of the future guest journey.



● SECTION 2

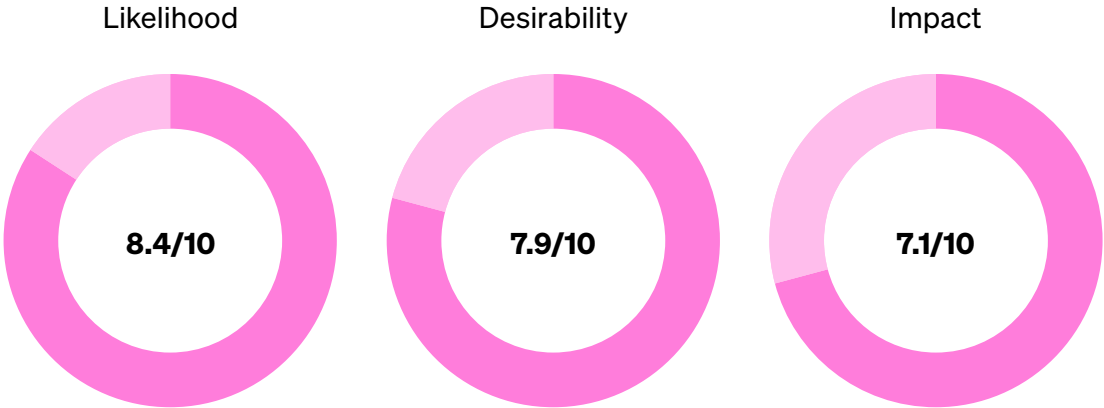
AI Agents

The future of frictionless operations

SCENARIO

“In the next 10 years, most midscale and upscale hotels will offer fully mobile stays, allowing guests to check in, unlock rooms, request services, and check out without human interaction.”

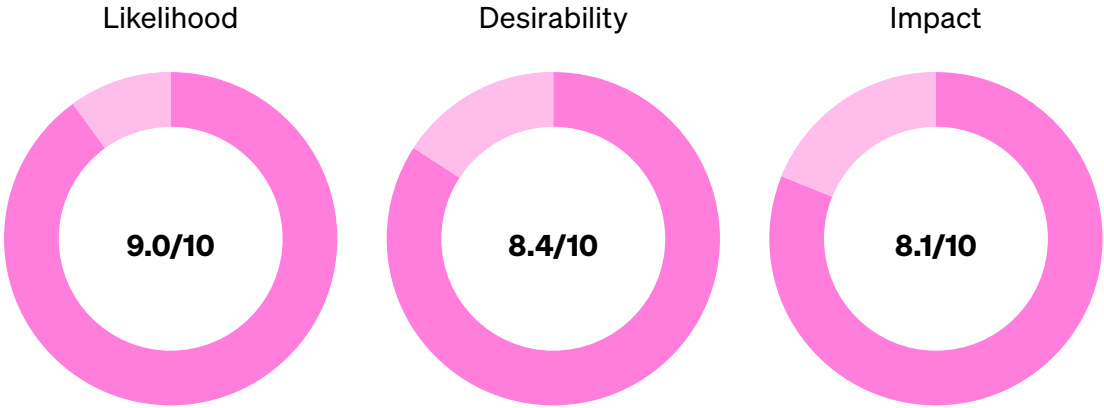
EXPERT VIEW



SCENARIO

“In the next 10 years, automated processes will handle at least 50% of back-office hotel tasks such as invoicing, scheduling, and procurement. AI-powered chatbots and digital concierges can handle up to 75% of routine guest requests, all reducing the need for physical staff considerably.”

EXPERT VIEW



2.1 The true potential of the front desk

Everyday guest experiences are often riddled with friction, making even simple interactions frustrating. Common pain points include:

- Long queues at check-in, repeated data entry, and paper forms.
- Guests arriving early and being asked to wait while rooms are prepared.
- Returning guests being asked if it's their first stay, despite previous visits.
- Guests unable to grab a quick breakfast before the buffet opens.
- Housekeeping knocking on doors to check which guests have departed.

59%

of guests go unrecognized as returning guests.

20%

take their business elsewhere afterwards.

These inefficiencies slow operations and dilute what should be moments of welcome, connection and thoughtful service. The front desk should be a place where personalized interactions and seamless experiences take center stage, rather than administrative friction.

SOPHIA

TRAVELER

Sophia’s arrival to LuxSuite, Naples, is delayed. Her AI assistant notifies the hotel agent, the hotel’s AI agent, which immediately updates her reservation with a late arrival note.



PERSONALIZED AGENT

Hi Marco, Sophia’s train to Naples is delayed by 90 minutes. Please update her reservation for a late arrival.



HOTEL AGENT

Update complete. She had a dinner reservation at 20:00 — would she prefer to move it to later tonight or to tomorrow?



PERSONALIZED AGENT

Tomorrow works best.



HOTEL AGENT

Done. I’ll send her the late-night room service menu. Should I filter for her usual dietary preferences?



PERSONALIZED AGENT

Yes — vegetarian, nut allergy.



HOTEL AGENT

Filtered menu sent. She can order directly in chat.

PRE-ORDER TONIGHT’S FOOD



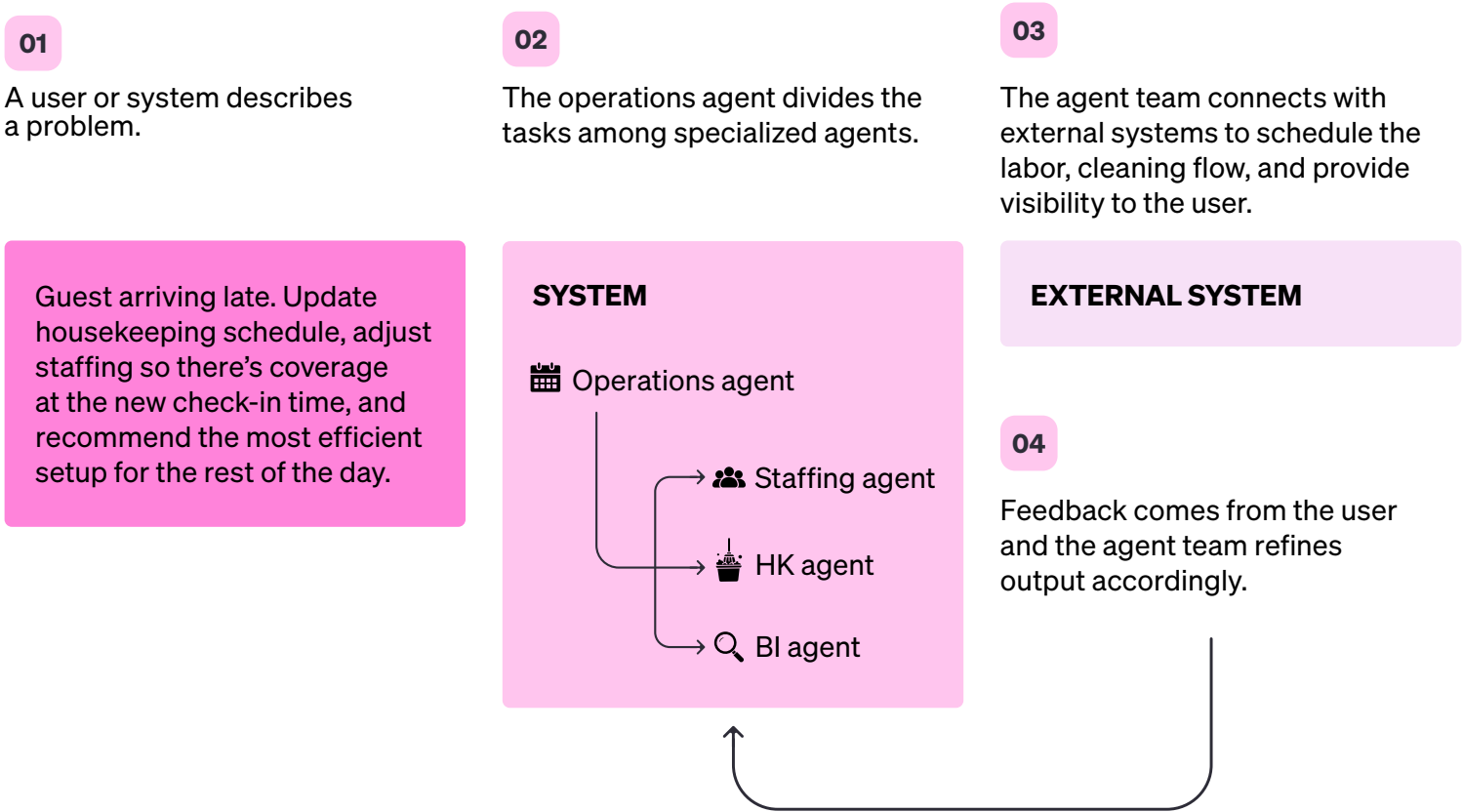
All of this happens seamlessly, without a single hotel staff member needing to intervene.

2.2 The rise of AI agents

Hotels have long leveraged cloud systems to automate manual processes, and many are now using generative AI assistants to handle general guest inquiries. Clunky booking systems, limited chatbots, and one-size-fits-all upselling tools should be relics of the past.

The next frontier is AI agents: intelligent assistants capable of both understanding natural language and taking autonomous action. These agents have the potential to become the ultimate colleagues for hotel staff, augmenting human intuition with speed, precision and insight.

HOW AI AGENTS WILL FUNCTION



EXPLORE MORE

Read more about Agentic AI's impact on hospitality in this whitepaper.



The potential of AI agents spans the entire property:

 RESERVATIONS

Manage new reservations, room allocations, cancellations and no-shows. Instantly retrieve guest data or booking information in natural language. Propose personalized upsells and ways to enhance the guest experience.

 REVENUE

Automatically adjust pricing based on real-time demand and historical data, often ahead of revenue managers spotting trends.

 OPERATIONS

Equip General Managers with timely strategic insights. Identify underperforming areas and recommend actionable improvements.

 GUEST EXPERIENCE

Deliver contextual recommendations and tailor in-stay interactions. For example, an AI agent can instantly identify VIP guests checking in, review their order history, select their preferred welcome amenities, and automatically notify staff to prepare the room, all enabling personalization at scale.

 HOUSEKEEPING

Predict occupancy, dynamically reallocate staff, schedule maintenance, and automate tasks to reduce turnaround times.

By handling operational complexity behind the scenes, agentic AI supports front- and back-of-house staff in their daily work. As more agents operate simultaneously, they can connect with each other and external sources, compounding impact and driving greater efficiency, quality, and operational performance.

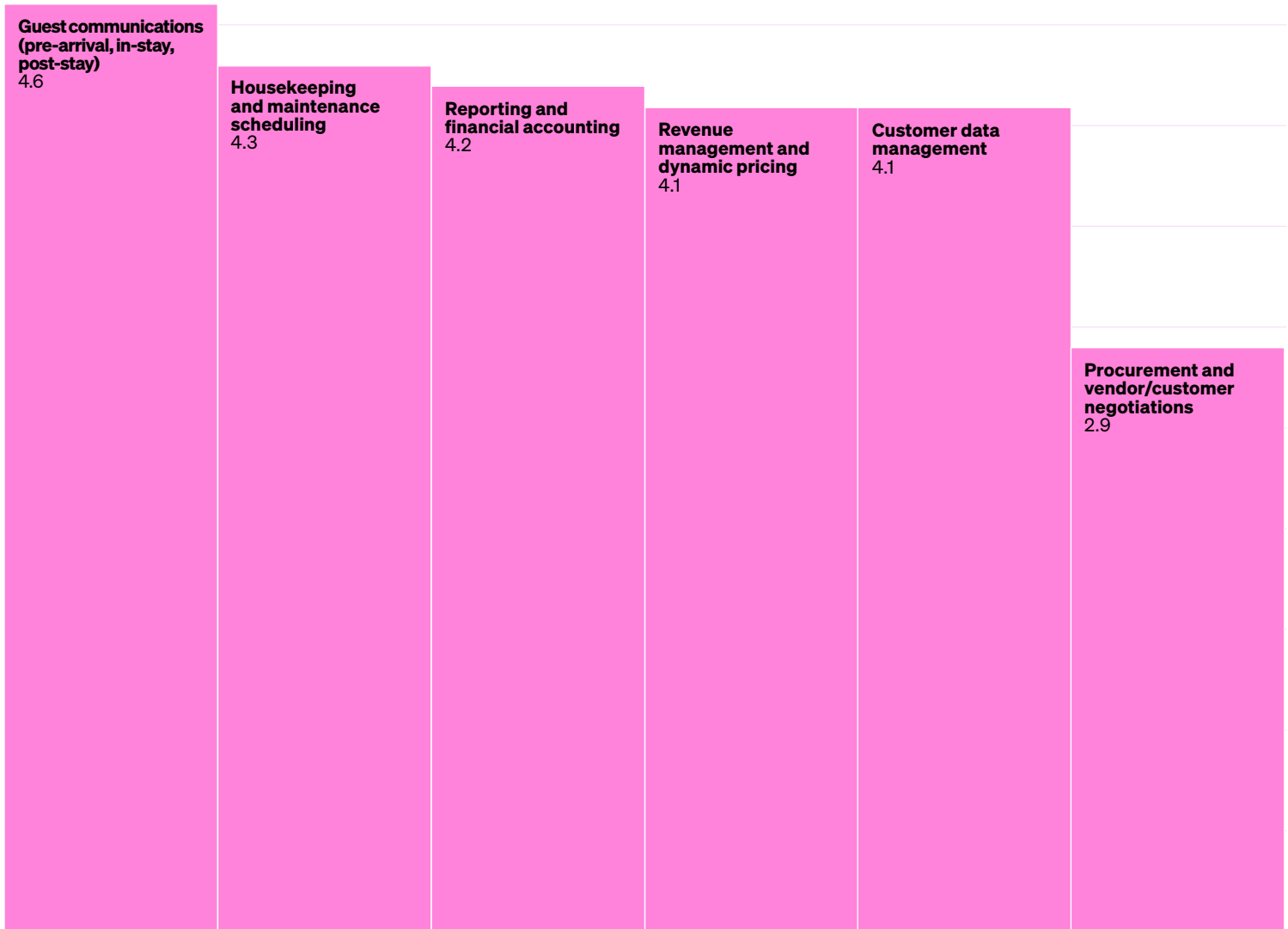
2.3 Agentic AI in 2035

2.3.1 DEPARTMENTAL READINESS FOR AGENTIC AI

EXPERT PANEL

A clear consensus emerged among our expert panel that back-office operations are the readiest for automation. Front-of-house functions, however, require careful consideration due to the importance of human interaction.

For each function below, please rate the likelihood that it will be fully delegated to Agentic AI in the future.



All scenarios scored on a likert scale with 0 = Highly unlikely to 5 = Highly likely. Graphs showing mean scores from 18 expert responses.

What our expert panel says

Automation in back-office functions (finance, HR scheduling, procurement) is already widespread in other industries, and hospitality is still playing catch up, making this inevitable. The efficiency gains are attractive – lower costs, faster response times, fewer human errors. But the downside is potential over-automation: if guest interactions feel ‘bot-heavy’ or staff presence feels skeletal, hotels risk damaging brand perception, especially in lifestyle or experiential segments.

Halima Aziz

Head of Hotels
Criterion Hospitality



We see a lot of willingness from the industry to test automation in back-office processes perhaps due to the perception that those will impact the guest experience less. Increasingly we see automated service providers bridging into digital marketing, real-time, dynamic processing, P2P, so it is in my view only a matter of time for this to be widespread across front and back office.

Leila Jiwnani

Head of Hospitality & Leisure
Advisory, Deloitte



50% of the back-office tasks might be automated, and that might be underestimated. Staff will still be required, but the skills will be split between 1) relational, 2) managerial (can orchestrate automation), and 3) strategic value to the business.

Jessica Gillingham

CEO, Abode Worldwide



The rollout of agentic AI will likely be slower and more targeted than GenAI chatbots, as operational agents require stable access to data and a strong semantic layer, capabilities many hotels are still developing. Early deployment will most likely focus on guest communications and housekeeping, while complex negotiation or procurement tasks remain largely human-led for now.

2.3.2 THE RISKS OF AGENTIC AI

The pace of change in generative and agentic AI is staggering, making it difficult for hotels to keep up. But what are the risks of rapid agentic AI adoption?

The biggest risks center on context-blind automation and exploitation. AI agents lacking human judgment could enable problematic decisions – like aggressive dynamic pricing during sensitive times when a human would recognize the need for restraint, or inadvertently discriminating against certain guests through pattern recognition.

James Bishop
VP, Ecosystem & Strategic Partnerships, SiteMinder



Humans make mistakes and cause risk today, so I am not sure Agentic AI will be any different. The bleeding edge companies will take the first risk, and everyone will learn the boundaries.

Dina Belon
President, Staypineapple



While agentic AI offers significant potential for automation and, ideally, personalization, it’s important to approach with caution. Agentic AI cannot simply be layered on top of legacy systems. It requires robust integrations across all platforms and a strong semantic layer. Only with these foundations in place can hotels begin testing AI agents safely and effectively.

BEST PRACTICE

Start small and stay in control. Introduce selective AI capabilities that support better decision-making while maintaining human oversight. Once your systems, integrations, and staff workflows

are stable, you can expand automation confidently. For a step-by-step approach, see the *Take Action* section at the end of this report.

2.4 What to expect from your tech stack

Your PMS should act as a central nervous system, connecting every AI agent, from pricing to housekeeping, into one ecosystem.

Strong connectivity and a single semantic layer allows agents to share insights across functions, handle repetitive tasks, and free staff to focus on exceptional, personalized service.



EXPLORE MORE

You can read more about our AI vision in this whitepaper.



SECTION 3

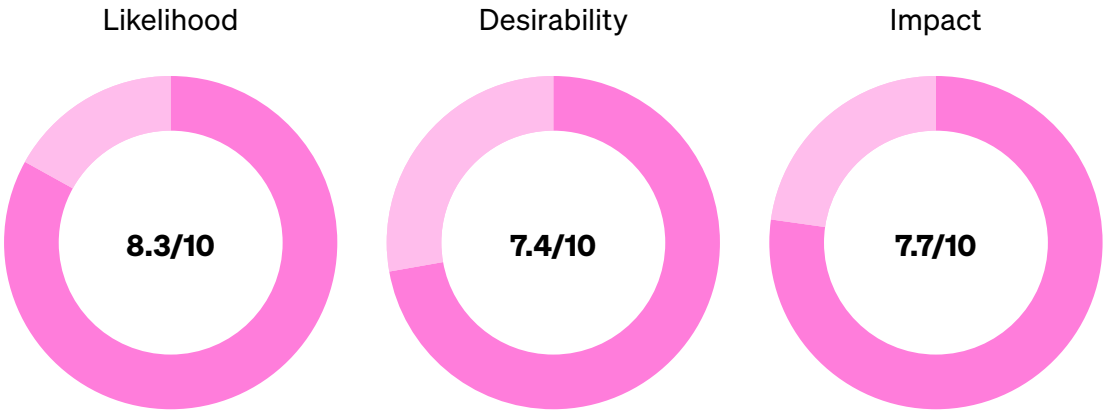
Automation

Elevating the human touch

SCENARIO

“In the next 10 years, hotel frontline roles will have evolved to focus solely on soft skills as all the transactional processes (check-in, upsells, payments, check-out) will be automated and enabled through digital self-service platforms.”

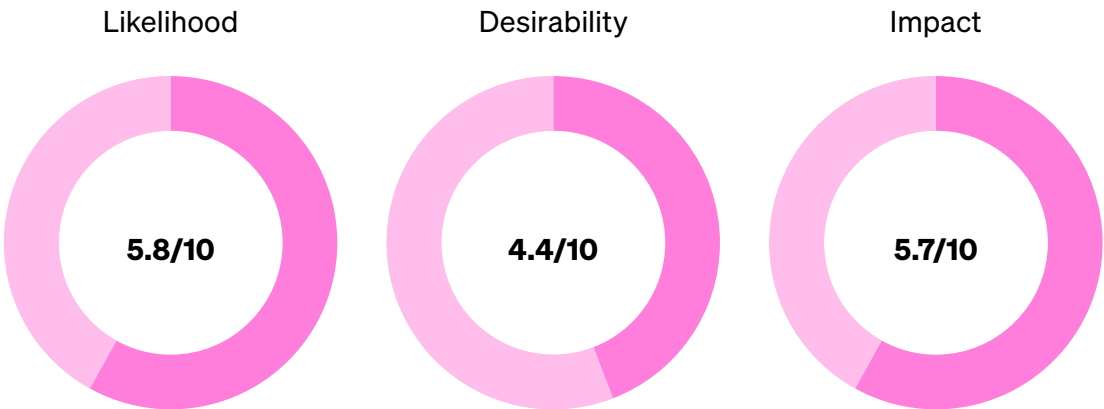
EXPERT VIEW



SCENARIO

“In the next 10 years, staffing in the hotel industry will function like a gig economy, with demand and supply for hospitality skills traded on a marketplace. Not unlike Uber today, short-term staffing shortages can be solved by purchasing time from professionals based on their availability.”

EXPERT VIEW



3.1 The soul of hospitality

Since the dawn of automation, hoteliers have feared that technology could strip away the warmth and humanity that define the guest experience. Yet hospitality, derived from the Latin *hospitalitas*, meaning “friendliness to guests”, is precisely about human connection.

It may sound counterintuitive, but technology can actually restore and enhance the human touch. As systems become smarter, faster and more intuitive, the industry faces a critical question:

Can we preserve the soul of hospitality at scale by using technology more intelligently?

There is no doubt, in an increasingly tech-first society, the human element is exactly what guests will be looking for. By reordering priorities and reimagining processes, hotels can free staff from administrative burdens, allowing them to focus on personalized interactions, thoughtful recommendations, and seamless experiences that make every stay feel distinctly human.



SOPHIA

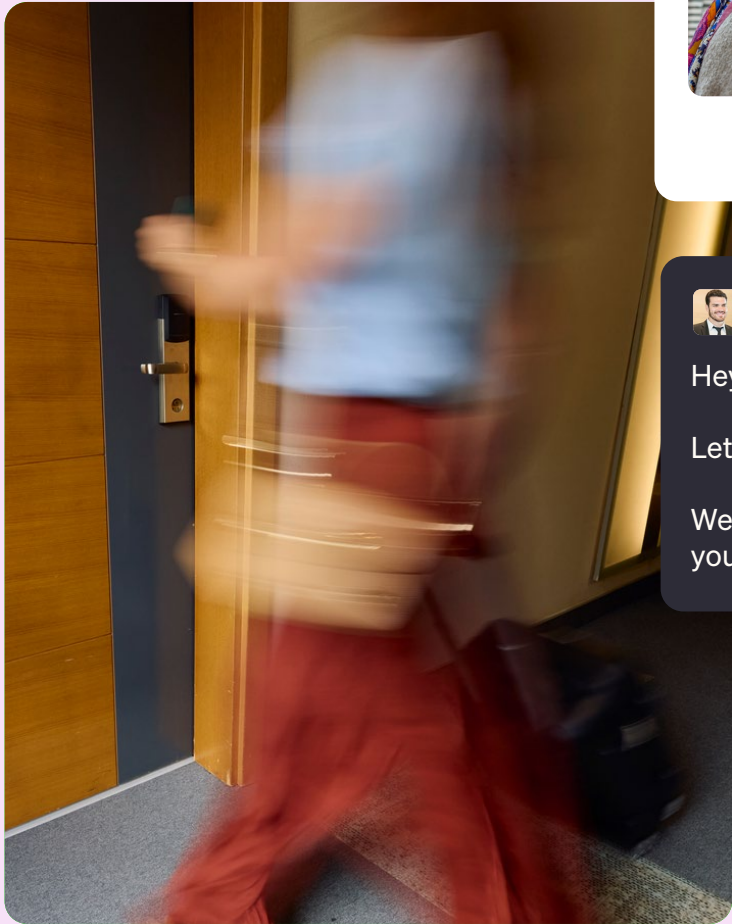
TRAVELER

After a long train ride from Rome, Sophia arrives at Hotel LuxSuite exhausted.

Thanks to her personal AI assistant, her passport details are already uploaded, and payment has been completed using the card on file, making check-in effortless.



NAME:	Sophia Reyes
PASSPORT:	Uploaded
PAYMENT:	Completed
PREFERENCES:	Vegan
INTERESTS:	Historical Architecture



HOTEL CONCIERGE

Hey, Sophia. You must be exhausted.

Let me take care of your bags.

We're bringing a hot chocolate up to your room so you can unwind a bit, after all those delays.

At the front desk, Francesco (the hotel's front-desk manager, concierge, and overall jack-of-all-trades), greets her warmly. Freed from administrative tasks, he can focus on creating meaningful connections.

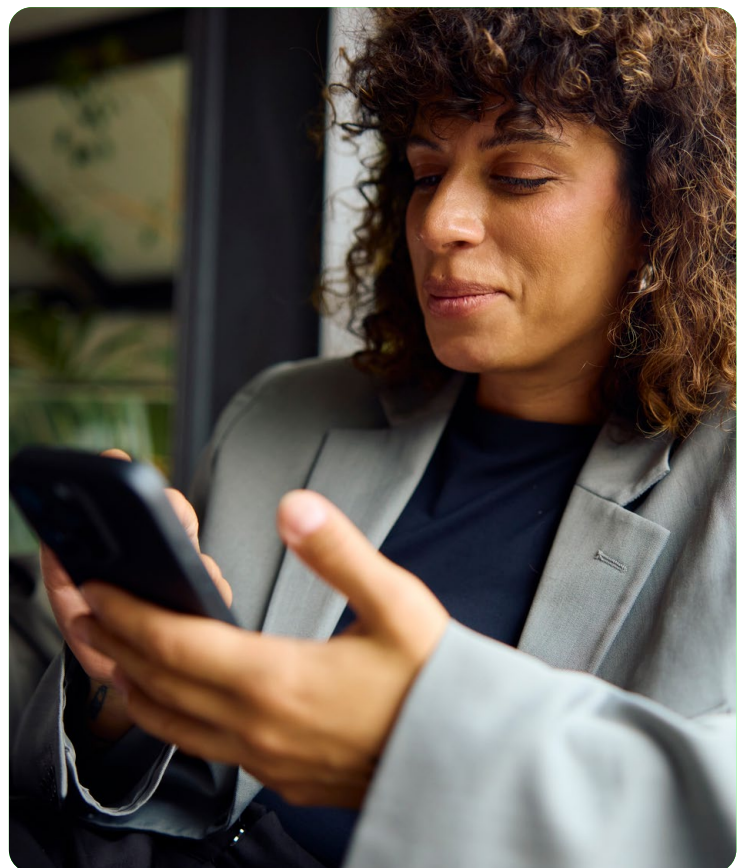
3.2 Robots, chatbots, and worker pools

From delivery bots to robotic concierges, the line between science fiction and service reality is rapidly blurring. Robots can clean rooms, deliver amenities and even mix drinks, but their greatest value is in supporting staff rather than replacing them.

Similarly, chatbots and AI agents capture valuable guest data (preferences, sentiment, friction points) which staff can then use to tailor experiences in real time. For example, if a guest mentions they are a foodie, an AI agent or staff member could proactively recommend a local tasting tour or highlight the evening's chef's specials.

This kind of human-AI collaboration enhances rather than diminishes hospitality, allowing staff to focus on empathy, connection and memorable moments.

Meanwhile, flexible worker pools or gig-style staffing models could help address labor shortages in non-guest-facing roles such as housekeeping, maintenance and kitchen operations. With high turnover and peaks and troughs in demand, this could provide a flexible solution to hoteliers that lack the time and resources to continuously train new staff members. By combining AI, robotics and adaptable staffing, hotels could deliver consistent, high-quality service without compromising the human touch.



3.3 Human hospitality in 2035

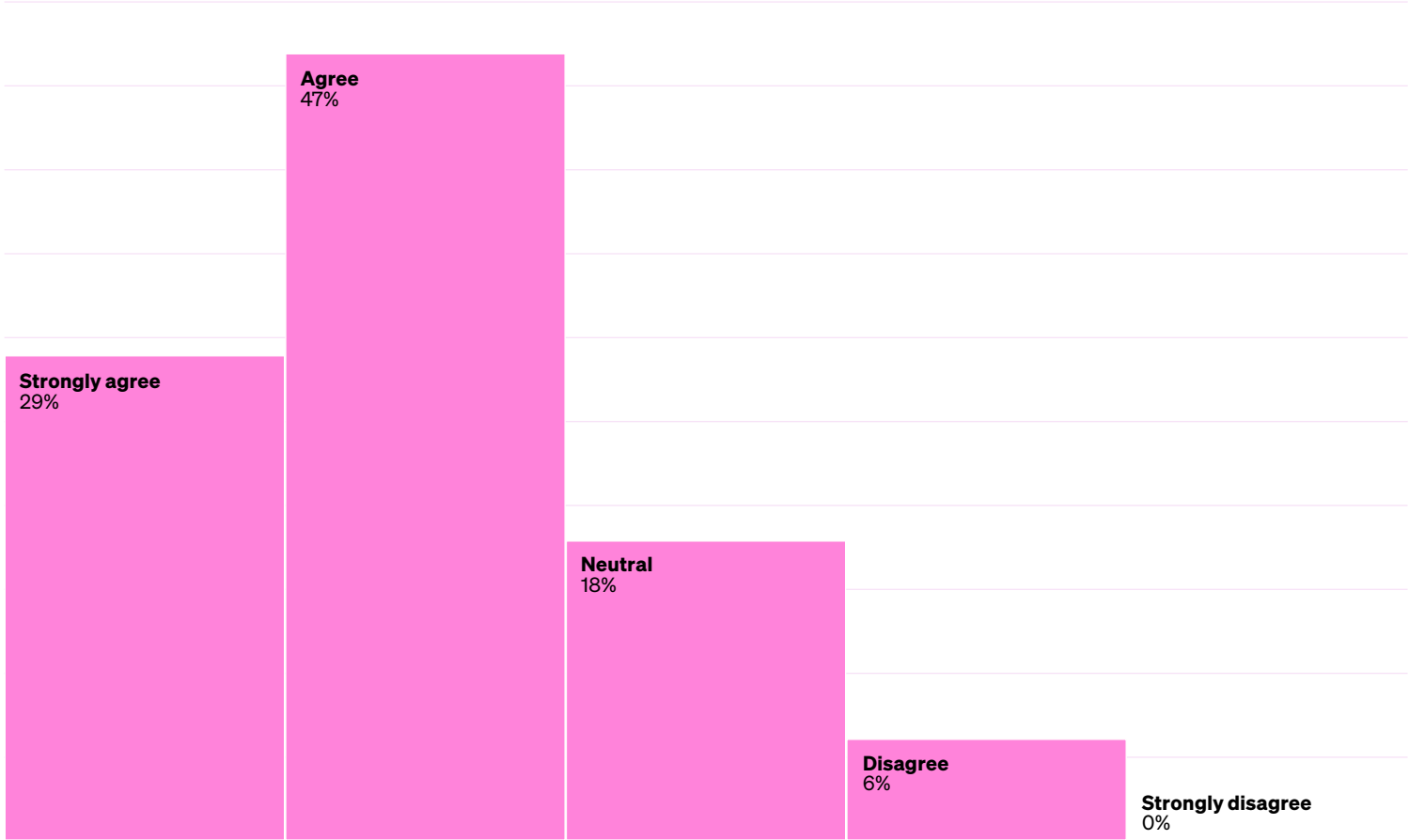
3.3.1 GUEST PREFERENCES

As hotels adopt AI and automation, a key question remains:

Do guests still value human interaction, or would they prefer a fully digital experience – checking in online, unlocking their room with a mobile key, and skipping conversation altogether?

EXPERT PANEL

“Guests will be less concerned with who delivers the service (robot vs. staff) if the outcome is fast, reliable, and personalized.”



76% of our panel agree that guests will be less concerned about who delivers the service (robot/staff) if the outcome is fast, reliable and personalized.

What our expert panel says

The future of hospitality depends on finding the right balance between automation and human touch. Skill sets will therefore become even more important than the systems, ensuring that technology enhances—rather than replaces—the human element in guest experiences. Being greeted with a genuine smile is something technology will never be able to replace.

Michaela Papenhoff

Founder and Managing Director
h2c GmbH



We are focused on removing the transaction and friction from the entire guest journey; however, there is a downside to this approach. If guests do not have to talk to us, we lose an opportunity to engage and learn things about them. Additionally, human trafficking is still something that we must be aware of, and knowing who is in the hotel is our best way to eradicate it.

Dina Belon

President, Staypineapple



As AI refines consistency and personalization, the true opportunity lies in using it to anticipate unspoken desires – ensuring every stay feels not only seamless but unexpectedly delightful. Luxury brands must elevate beyond efficiency – blending intelligent foresight with human intuition.

Julia Record

Global Director of
Communications & Partnerships,
Dorchester Collection



While automation can streamline operations and reduce friction, there are trade-offs. Human interaction is a critical source of insights about guests. It also plays a vital role in safety and security: recognizing who is in the hotel helps prevent issues such as human trafficking or unauthorized access.

Technology is better at capturing and executing some things. AI will consistently capture and store information like:

- Room preferences
- Dietary restrictions, allergies and wellness needs
- Travel motivations (leisure, business, special occasions)
- Service expectations (quiet floor, early breakfast, local experiences)
- Lifestyle preferences (fitness, spa, food, cultural interests)
- Upsell opportunities

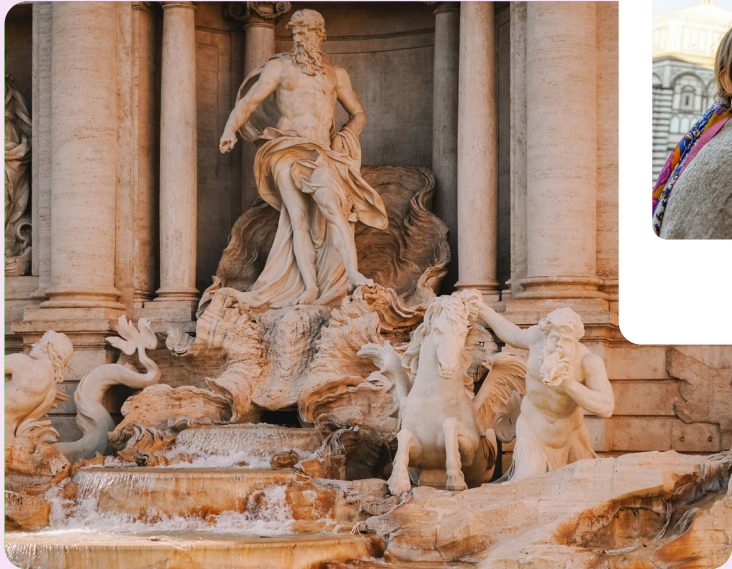
By combining these insights with human judgment, hotels can deliver deeply personalized experiences that balance efficiency with warmth.




SOPHIA

TRAVELER

Thanks to the hotel agent, Francesco knows that Sophia is passionate about history and architecture.





NAME:

Sophia Reyes

PASSPORT:

Uploaded

PAYMENT:


Completed

PREFERENCES:


Vegan

INTERESTS:


Historical
Architecture

 HOTEL AGENT


Sophia loves history and architecture.
Recommend a local tour.

 FRANCESCO

I thought you might like to know there's a guided tour of ruins nearby – do you want to check it out?

 SOPHIA

That's sounds awesome!

 HOTEL AGENT

Tour booked for 11.00



At her request the hotel agent books the tickets in the background while Sophia heads out.

3.3.2 SEGMENT NUANCES

To automate or not to automate?

Our panel believe that the answer depends largely on hotel class and clientele.

Economy and midscale hotels see automation as a way to reduce costs and maintain consistency across properties. In these hotels, nearly all service elements could eventually be automated, though roles such as bar and waiting staff are likely to remain human.

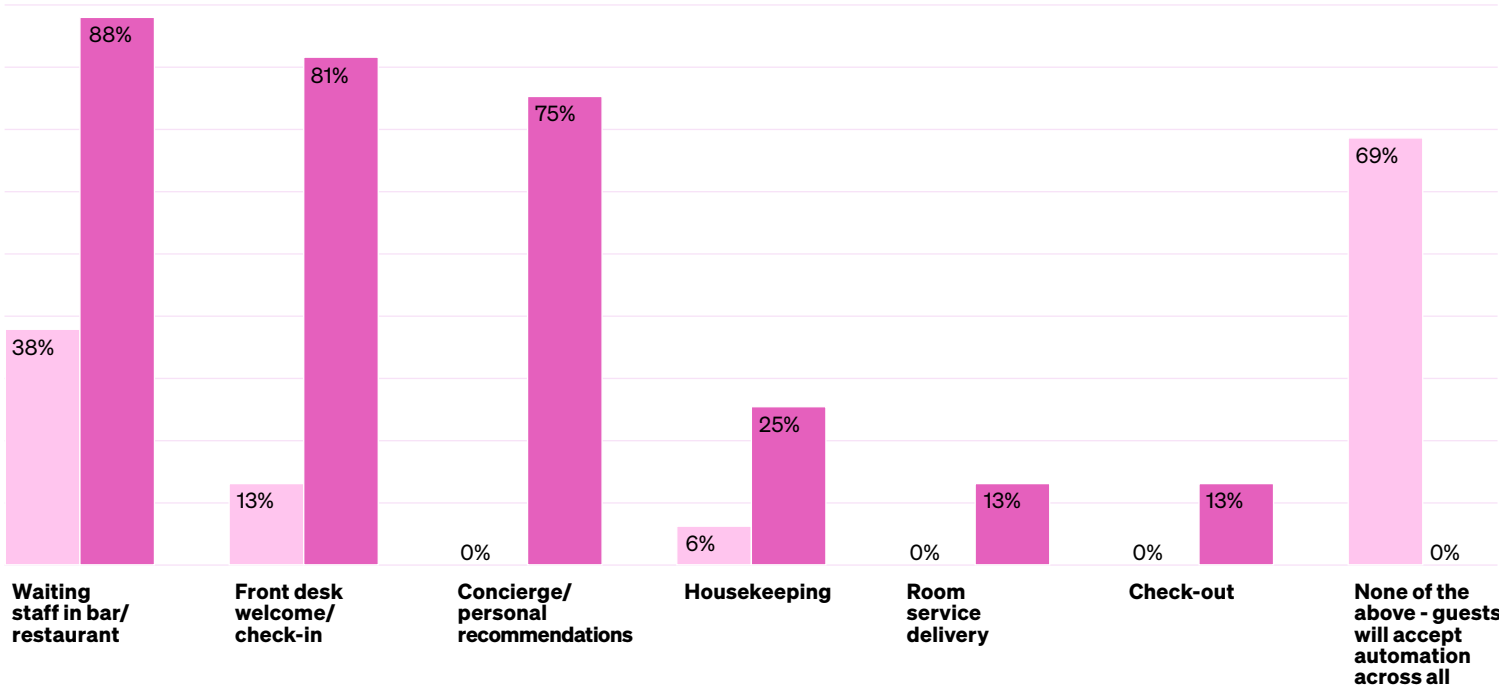
Luxury hotels, on the other hand, often perceive it as a potential threat to the essence of personalized service. In luxury hotels, human hosts will remain essential in roles that define the guest experience (such as front desk, concierge and restaurant service), while areas like housekeeping and checkout are expected to become fully automated.

It’s not only down to scale or class, but also location or guest segments. Business travelers tend to be more open to automation than leisure guests, who often seek emotional connection and memorable service moments.

EXPERT PANEL

- Midscale/economy hotel
- Luxury hotel

“According to you, which of these guest interactions must remain human-delivered to meet guest expectations in a midscale/economy or luxury hotel?”



What our expert panel says

In select-service and economy hotels, AI will be highly visible and widely used to drive efficiency, automate routine tasks, and deliver scalable personalized experiences, meeting the needs of cost-conscious travelers. Conversely, in upscale and luxury segments, AI tends to operate more discreetly behind the scenes, enhancing operational efficiency without replacing the deeply valued human elements of empathy, trust and nuanced personal interactions that discerning guests expect.

Henri Roelings
Founder, Hospitality Net



Automation of transactional processes is already underway with mobile check-in, keyless entry, kiosk upsells and digital payments. Over a 10-year horizon, it's reasonable to assume that most transactional touchpoints will be fully automated, particularly in urban, midscale, and lifestyle hotels. Luxury segments may retain some manual elements for "theatre" value, but even there, automation will support staff rather than replace them.

Halima Aziz
Head of Hotels,
Criterion Hospitality



What our expert panel says

3.3.3 REIMAGINING STAFF ROLES

The real challenge for hoteliers isn't whether to automate, but:

How to reimagine staff roles around the human moments that matter most.

Automation is already removing most transactional tasks, so it feels realistic that frontline roles will center almost entirely on soft skills. That shift could be very positive: staff focusing on creating connections, solving problems and delivering hospitality rather than pushing paper. The challenge will be training and hiring the right people who thrive in these more human-focused roles.

Adrie Vreeke
CEO, Capsule Hotel Group



Transactional processes like check-in, payments and check-out will be increasingly automated through digital platforms. This is desirable because it allows staff to focus on soft skills and authentic guest interaction, which ultimately matter more than the technology itself.

Michaela Papenhoff
Founder and Managing
Director, h2c GmbH



The skills needed for talent will change, and soft skills will become more desirable, as will management skills to orchestrate and oversee automation.

Jessica Gillingham
CEO, Abode Worldwide



Staff will need training in emotional intelligence, communication and brand storytelling, becoming true ambassadors rather than clerks. Hotels that invest in this transition will differentiate themselves, especially in upscale and luxury segments where human touch remains a defining factor.

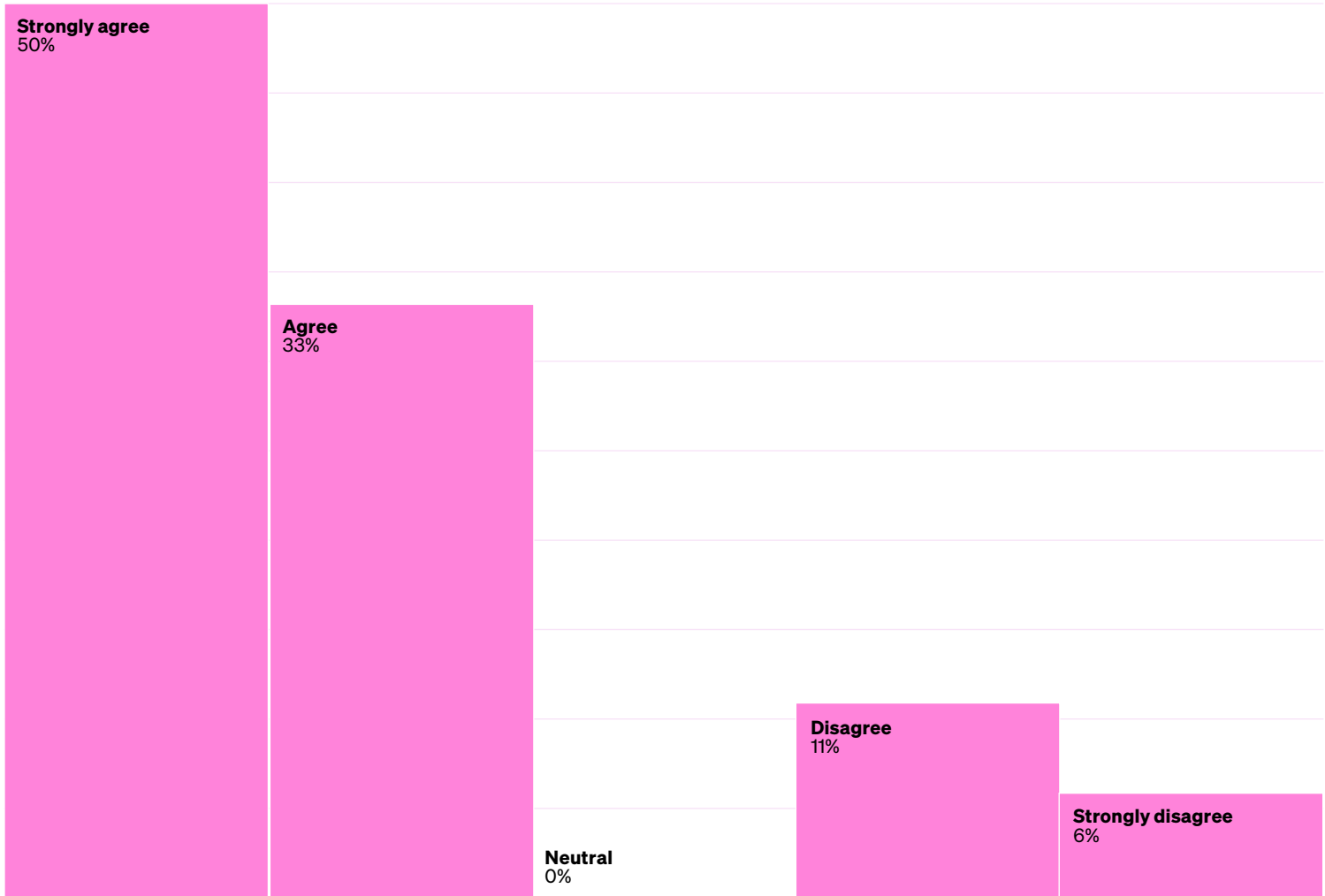
H. Anthony Gambini
CEO & Founder,
Premiere Advisory Group



EXPERT PANEL

Investing in staff will remain critical to achieving a sustainable business model where AI and human staff work in tandem. This is why our panel were skeptical about a future where robots or worker pools could alleviate staffing issues that have plagued the industry for so long.

“By 2035, hybrid service models (AI/robots for routine tasks, staff for emotional/complex interactions) will be the industry norm.”



The emotional intelligence, consistency and brand alignment required in hospitality are difficult to replicate through temporary or ad hoc labor.

However, worker pools or robotic assistance may prove effective in non-guest-facing areas such as housekeeping, maintenance or kitchen operations. And while robots may never replace human warmth, if one can deliver room service calmly and efficiently on a hectic day, perhaps that, too, is a form of hospitality.

What our expert panel says

Automated vacuums or carrier robots for housekeeping tasks are realistic and can support staff in physically demanding work. But I don't expect robots to play a meaningful role in the guest experience. Using them to serve guests directly feels both unlikely and undesirable, as it takes away from the human side of hospitality.

Adrie Vreeke
CEO, Capsule Hotel Group



Hotels will test flexible labor models. There's going to be more matching of housekeepers to meet surges in demand. That will be partly done on an Uber-style, on-demand labor pool model. But it will be tricky because, even at the most basic select service hotel, there are so many protocols. You need to train. A person can't just walk in and suddenly do it or not have done it for a week or two and then suddenly get it all right.

Sean O'Neill
Senior Hospitality Editor, Skift



As routine admin tasks become less important thanks to automation, team members will require growing levels of skill, brand and tone of voice training. This makes Uber-style outsourcing difficult to integrate within successful hotel teams.

Carlo del Mistro
Chief Digital Officer, Ennismore



There are a range of roles in hospitality, but it should be a rewarding career linked to the differentiated brand experiences, not a low skilled, commoditized, replaceable gig role.

James Lemon
Hospitality, Travel & Leisure
Global Lead, Stripe



BEST PRACTICE

Define your service identity. Clarify what your brand stands for and what guests and staff expect from a stay at your hotel. If these answers aren't clear today, use

AI agents to help reimagine and elevate your service standards, then develop SOPs in collaboration with your team.

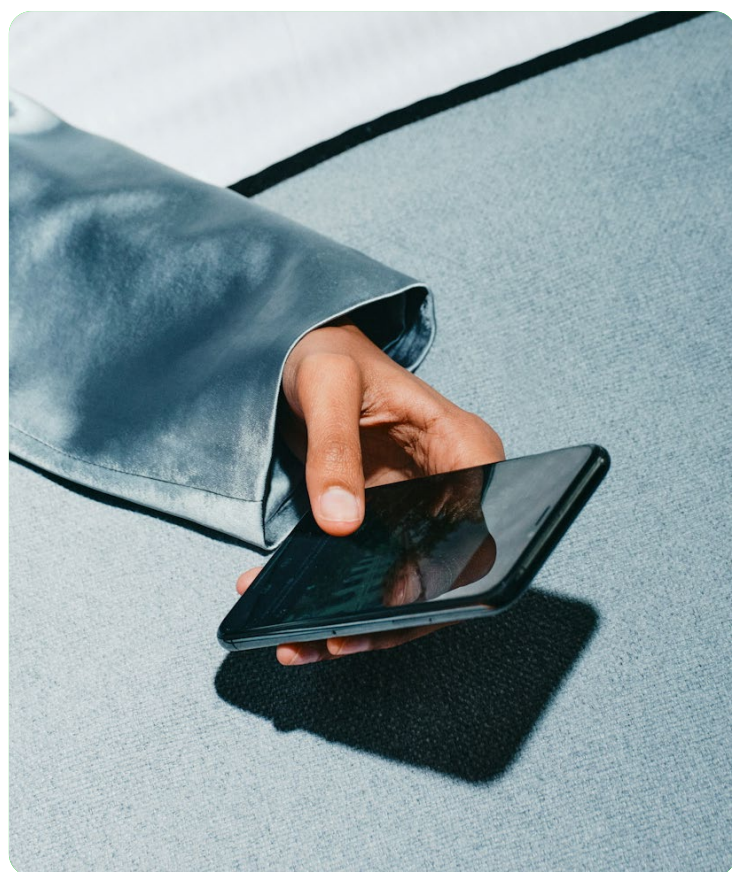
3.4 What to expect from your tech stack

Your approach should reflect your brand promise:

- For lean, digital-first models: focus on integrating technology and AI deeply to drive efficiency.
- For high-touch luxury brands: use AI to enhance humanity, surfacing insights that empower staff to deliver thoughtful, personal moments.

AI doesn't replace hospitality. The most successful hotels will be those that use AI to automate the unremarkable, so their staff can focus on the extraordinary.

Is your current technology stack able to support your vision?



Your AI-readiness checklist

The scenarios discussed in this report won't all transpire in 2026. In fact, when we put the scenarios to our expert panel, we told them to think 10 years into the future. However, many of the changes discussed in this report are already underway or will happen soon. 2026 will be the time to take action.

Use these four steps to assess your readiness and start working with generative and agentic AI in practical, low-risk ways.

1

ASSESS YOUR TECH STACK AND DATA READINESS

Before adopting AI tools or agents, understand what your current systems can support. This helps avoid fragmented pilots and wasted effort.

- Map your core systems – PMS, CRM, messaging, housekeeping, POS, payments and any integrations between them.
- Identify data gaps and silos – what data lives where, what's accessible via API, and what's still manual?
- Evaluate AI readiness – can your PMS or tech stack expose clean, structured data that AI tools could use? Are integrations open and well-documented?
- Check vendor roadmaps – understand which of your partners are evolving toward AI-driven features or APIs that can support future automation.
- Prioritize low-effort improvements – consistent naming conventions, automated data syncs and clean guest profiles are small steps that pay off later.

Speak with a Mews representative if your current tech setup falls short.

2

GET YOUR CONTENT AI-READY

Before you experiment with AI, make sure your hotel's information is accurate, structured and consistent. This is the foundation for GenAI search, booking and guest communication.

- Audit all guest-facing content – website, Google Business Profile, OTA listings, social media, PDFs.
- Create a single “source-of-truth” factsheet using structured fields (rooms, amenities, fees, policies, accessibility, etc.), ideally following schema.org standards.
- Write concise Q&As for your top 50 guest questions and ensure all answers align with policies and rates.
- Assign ownership and update cadence for each content field.
- Sync and monitor – check monthly for discrepancies across channels and track how AI summaries represent your property in search results.

3

RUN ONE SMALL, HUMAN-SUPERVISED PILOT WITH AN AI AGENT

Once your foundation is ready, start small. You don't need advanced AI agents to learn what works; begin with simple, measurable automation that lightens repetitive work.

- Choose a narrow use case – for example, answering routine pre-arrival questions, logging maintenance tickets, or summarizing guest feedback.
- Work within existing systems – many PMS or messaging tools (including Mews Marketplace apps) already enable limited automation or AI-assisted replies.
- Set guardrails – specify which actions can be autonomous and which require human review.
- Measure outcomes – track response times, accuracy, guest satisfaction and staff time saved over 4-6 weeks.
- Iterate weekly – review transcripts, edge cases and errors to refine the workflow. search results.

4

BUILD GOVERNANCE AND GROW WITH YOUR TEAM

Successful AI adoption is more about people and processes than technology. Make sure your team feels confident, and your policies are clear.

- Create a small AI working group – GM, Operations, Front Office and a tech lead. Meet monthly to review results, risks and next steps.
- Clarify responsibilities – define who reviews AI-assisted outputs, handles exceptions, and updates content or workflows.
- Train staff on “AI-to-human” handoffs and recovery skills so service remains personal.
- Collect staff feedback on what tasks feel repetitive or time-consuming – these are candidates for your next automation experiment.
- Track progress with a simple scorecard (response time, accuracy, guest sentiment, staff time saved) and expand slowly, one property or team at a time.

Summary

Generative and Agentic AI are set to redefine every stage of the guest journey over the coming years, from discovery to check-out, making connected data and systems more critical than ever.






This report has focused on a few key areas of change that will play out over the coming years:

- 01** GenAI is compressing discovery and booking into conversational journeys, making structured content and connectivity decisive for visibility and conversion. Hotels that invest in rich, consistent data and open APIs will surface more reliably across AI platforms and protect direct demand through differentiated ancillaries and experiences.
- 02** Agentic AI is set to augment operations first in back-office, guest communications and housekeeping, but success depends on strong integrations and a mature semantic layer before scaling automation.
- 03** The goal of agentic AI is not replacing hospitality but enhancing it: automate the admin so people can deliver personal experiences. Segment strategy matters. Economy/midscale can lean further into visible automation, while luxury should keep AI largely behind the scenes to elevate human touchpoints. Understand your identity and act accordingly.



Mews was built for this moment.

Our multi-product platform connects every part of the guest journey, turning fragmented data into actionable intelligence:

 SEARCH	Dynamic pricing optimization via Atomize.
 BOOKING	Unified booking for rooms, spaces, and services.
 CHECK-IN	Centralized guest profiles for seamless personalization.
 STAY	Integrated F&B management through a connected POS.
 PAYMENT	Tokenized, profile-linked payments that enable frictionless charging and lifetime spend tracking.

We’re consolidating data into useful formats and investing heavily in AI, so hotels can move faster, think smarter, and deliver more human hospitality than ever before.

We don’t just collect data, we structure it, connect it, and unlock its potential.

Methodology

We gathered 18 hospitality experts who are completely entrenched in the frontlines of our industry. While they can't predict the future, their collective insight into key topics provides an informed view of how the hospitality industry might evolve in the coming years.

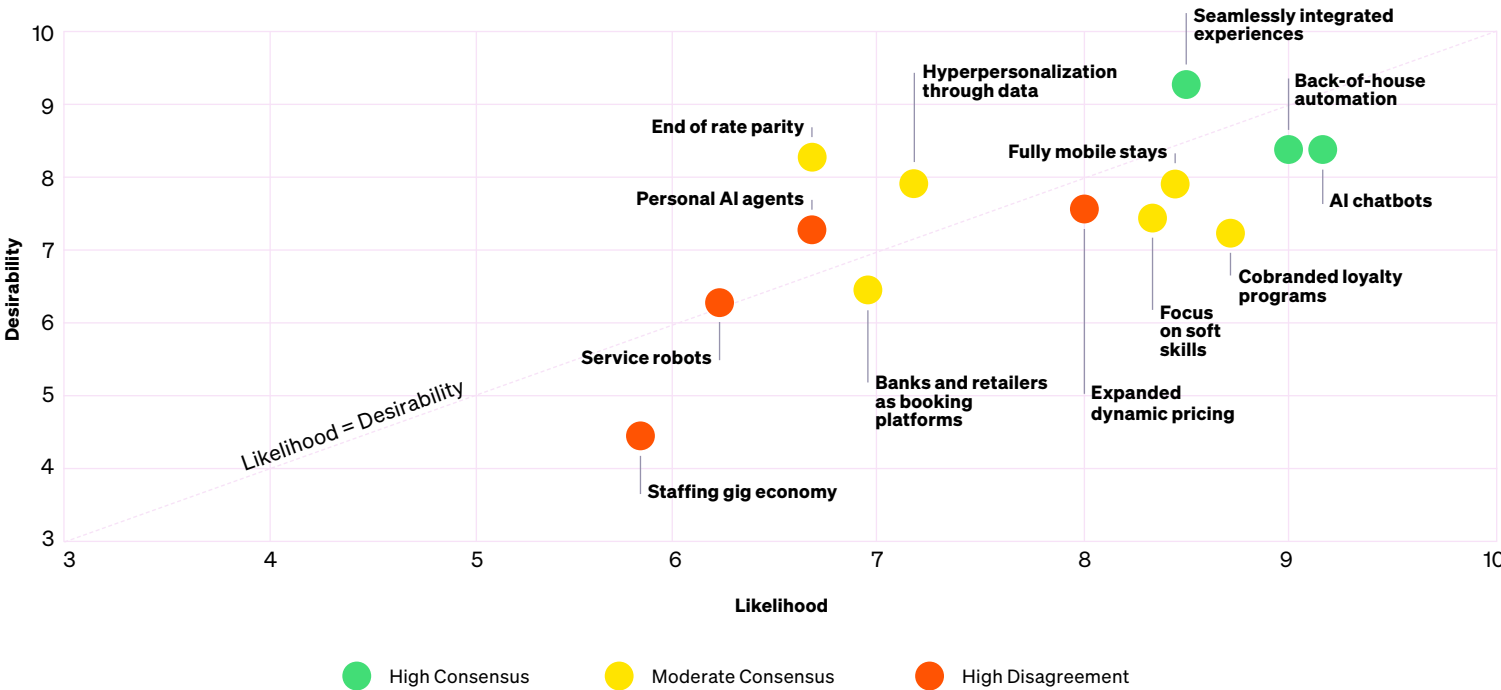
For this report, we utilized a Delphi-inspired research method, widely used for business forecasting. The aim was to canvas opinion and reach consensus, as well as highlight areas of disagreement – perfect for a study about the future of the hospitality industry.

In September 2025, our expert panel filled in two surveys. First, we sent an online survey with 15 future-looking statements, and asked the panel to independently score them based on likelihood, impact and desirability. Then, a second online survey dove deeper into major areas of contention or agreement between the experts, to collect further commentary and understanding.

How Likely Are the Following Future Scenarios?

Below is a schematic view of the different scenarios and how they were rated by our experts for likelihood and desirability. Consensus is based on the variation in answers and indicated with traffic light coloring.

Scenarios by Likelihood, Desirability and Agreement Level.



Likelihood and desirability scored from 0 (Low) to 10 (High). Agreement level is the compounded average of standard deviations of likelihood, desirability and impact scores. Below 2 is high consensus, between 2 and 2.5 is moderate consensus, and above 2.5 is high disagreement.

Acknowledgements

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Adrie Vreeke
CEO, Capsule
Hotel Group



H. Anthony Gambini
CEO & Founder, Premiere
Advisory Group



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Founder and Managing
Director, h2c GmbH



Roemer Visser
Global Head of
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Booking.com



Sean O'Neill
Senior Hospitality Editor,
Skift

A photograph of a bedroom interior. In the foreground, a bed with a white sheet is visible. A pillow with a white base and orange vertical stripes is placed on the bed. The pillow's top edge features a floral pattern with orange and green flowers. Behind the bed is a dark wooden headboard with a pointed finial. To the right, a light-colored wooden door or panel is partially visible. Sunlight streams in from the left, casting a bright, diagonal shadow across the white wall and the wooden door. The word "MEWS" is printed in a large, white, sans-serif font, centered horizontally and partially overlapping the wall and the door.

MEWS